

# HOW TO ADD CUSTOM FIELDS TO USERS







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# POLL

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# AGENDA

- i FormBuilder Users
- Automatic Lookup Element
- Common Use Cases



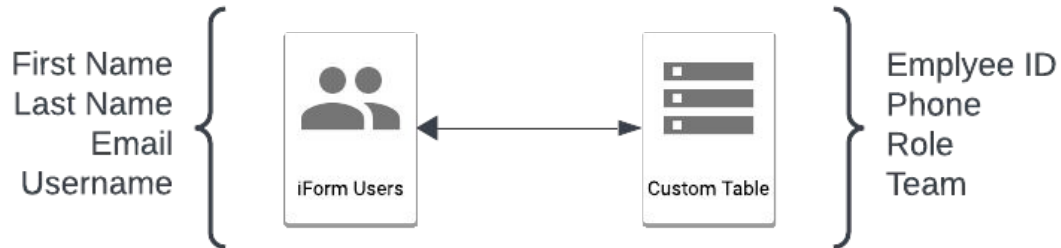


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# iForm Users

- IFB users have four primary properties
- Additional context-specific properties can aid in data collection
- Users should not "select themselves" nor change who they are
- A hidden lookup table with auto-select allows importing fields into a record



# iForm Users

## General Information

iForm User ID 53820222  
 ZIM User ID 64edf3da1e0afe6db500ecf6  
 Profile ID 408561  
 Username jhsu\_webinar  
 First Name Jonathan  
 Last Name Hsu  
 Email jhsu@zerionsoftware.com  
 Status Active  
 License Count

Change Password

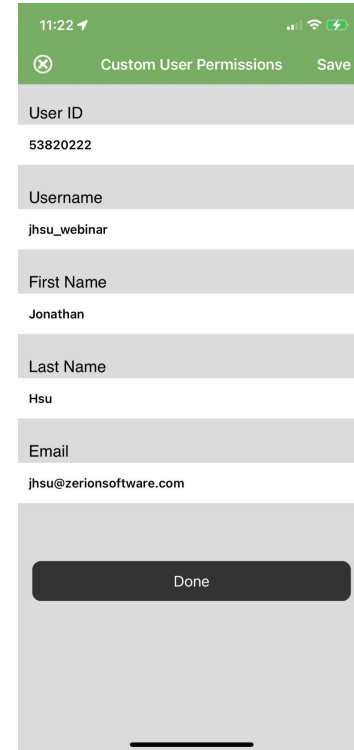
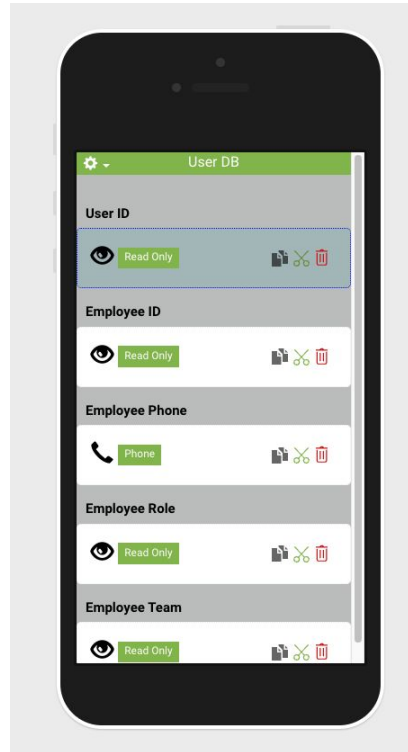
Assigned Policies

Assigned Groups



NAME

Basic User



# User Lookup

Element Properties

**Assign Lookup**

**Table Name \***

**Displayed Columns \***

Assign lookup
Clear lookup

**Dynamic Attributes**

Auto-Select  Filter

**Auto-Select**

The element will auto-populate when only one lookup record is available for selection. NOTE: Large lookup tables may experience slower performance.

**Filter**

Restrict the selectable records based on criteria

See Filter In [SQL query](#) | [JS Statement](#)





# Parsing the Lookup Element

Sort Order	Label	Name	Dynamic Value	Condition Value
0	User ID	user_id	iformbuilder.userID	
1	Username	username	iformbuilder.username	
2	First Name	first_name	iformbuilder.firstName	
3	Last Name	last_name	iformbuilder.lastName	
4	Email	email	iformbuilder.email	
5	User Lookup	user_lookup		false
6	Employee ID	employee_id	custom_user_permissions.user_lookup.employee_id	false
7	Employee Phone	employee_phone	custom_user_permissions.user_lookup.employee_phone	false
8	Employee Role	employee_role	custom_user_permissions.user_lookup.employee_role	false
9	Employee Team	employee_team	custom_user_permissions.user_lookup.employee_team	false





# POLL

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# Common Use Cases

- "Manager only" fields
- Add signatures to User DB
- Validation for "employee not found"
- Define direct supervisor
- Filter subsequent Lookup Elements

# ANNOUNCEMENTS

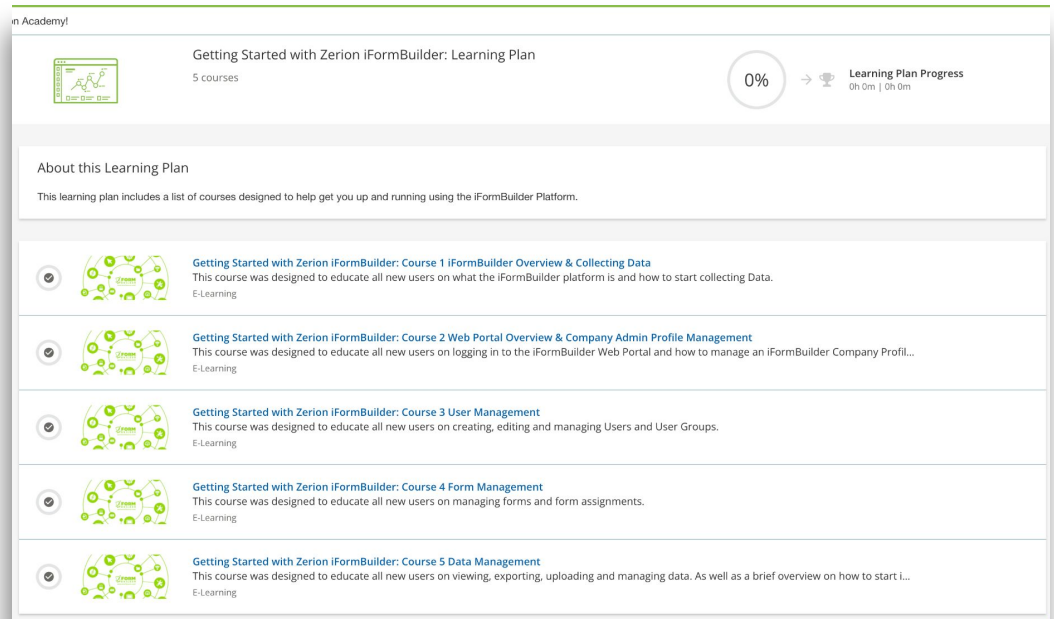
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- Zerion Academy Asynchronous Courses Now Available!
- Attend Zerion Reimagined Onsite Workshops & Certification: Sept 12-15 in Herndon, VA.
- Upcoming Webinars:
  - September 20 - Form Building 102: The Building Blocks of Smart Controls
  - October 4 - Public Link Forms, More Than Just a Form

# How to Access Getting Started Asynchronous Courses

1. Create a user in Zerion Academy  
<https://zerionsoftware.docebosaas.com/learn/register> . We suggest creating a username that is your email address. (Already have one? Skip to step 3.)
2. Follow the steps in the email to confirm your account and change your password.
3. Log in to Zerion Academy. Once logged in, click on the following Learning Plan link. This enrolls you and brings you to the learning plan that contains the courses.  
[https://zerionsoftware.docebosaas.com/lms/index.php?r=coursepath/deeplink&id\\_path=21&hash=34ca05d869b49e9dd58548a4417cfb1a98b7e83c&generated\\_by=13007](https://zerionsoftware.docebosaas.com/lms/index.php?r=coursepath/deeplink&id_path=21&hash=34ca05d869b49e9dd58548a4417cfb1a98b7e83c&generated_by=13007)



The screenshot shows the 'Getting Started with Zerion iFormBuilder: Learning Plan' page. At the top, it indicates '5 courses' and a progress indicator showing '0%' completion. Below this, there is an 'About this Learning Plan' section stating that the plan includes a list of courses designed to help get users up and running. The main content area lists five courses, each with a green circular icon and a description:

- Getting Started with Zerion iFormBuilder: Course 1 iFormBuilder Overview & Collecting Data**  
This course was designed to educate all new users on what the iFormBuilder platform is and how to start collecting Data. E-Learning
- Getting Started with Zerion iFormBuilder: Course 2 Web Portal Overview & Company Admin Profile Management**  
This course was designed to educate all new users on logging in to the iFormBuilder Web Portal and how to manage an iFormBuilder Company Profile. E-Learning
- Getting Started with Zerion iFormBuilder: Course 3 User Management**  
This course was designed to educate all new users on creating, editing and managing Users and User Groups. E-Learning
- Getting Started with Zerion iFormBuilder: Course 4 Form Management**  
This course was designed to educate all new users on managing forms and form assignments. E-Learning
- Getting Started with Zerion iFormBuilder: Course 5 Data Management**  
This course was designed to educate all new users on viewing, exporting, uploading and managing data. As well as a brief overview on how to start i... E-Learning

# THANK YOU!

