iFORM BUILDER WEBINAR

FORM BUILDING 101: THE BASICS
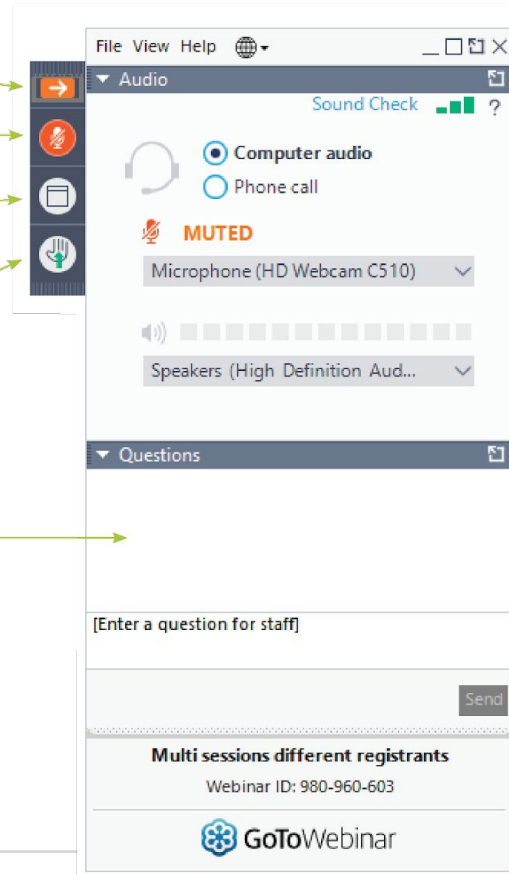
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Speakers (High Definition Aud...)

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POLL

Agenda

- Set Up For Success

- The Elements of Form Building

- The 3 Form Building Golden Rules
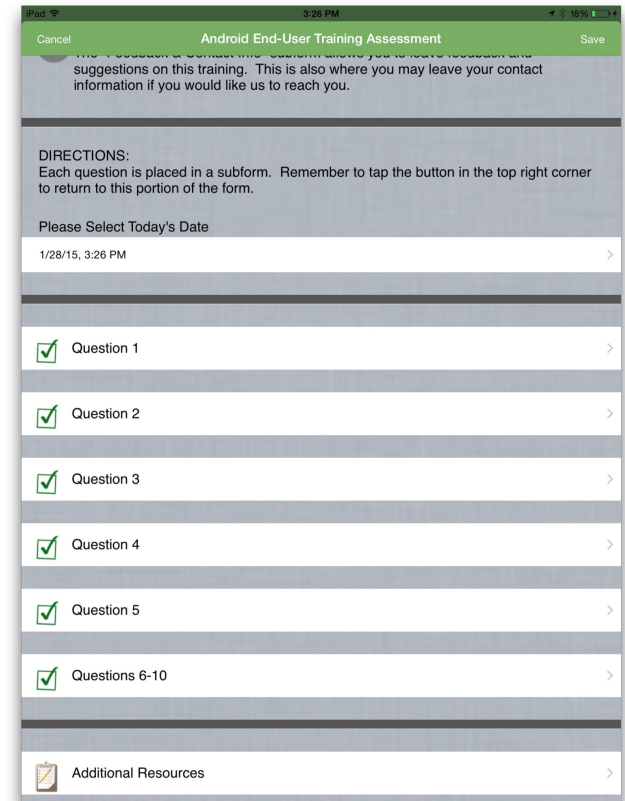
- Managing Option Lists

- Announcements

Set Up For Success

Project Planning

- What type of Data Collection will be used? Mobile Devices? Webforms? Public Links? All?

- What devices will the end-users have access to?

- Will users be online? Offline? Both?

- What naming convention do I use for this form and option list?

- How should I structure the form? Are there going to be subforms? Where can I split up my form into different subforms?

- What element types should I use for each question?

- Where can I add form functionality (Smart Controls) to cut down on human error and input?

Build Forms With End Users in Mind

Organization of Your Forms (Naming Convention)

Subforms are...

- a modular solution to lengthy forms
- created like a normal form
- stored in their own table
- displayed inline or standalone
- capable of single or multiple submission
- capable of being aggregated

_p   _c

Parent/Child Naming

Use the Table Name for organizing your forms

Uncheck 'Based on Label'

Append **_p** for parent or **_c** for child

Forms
elevator_inspection_basic_p
elevator_inspection_building_information_c
elevator_inspection_enhanced_p
elevator_inspection_inside_car_c
elevator_inspection_inside_car_enhanced_c

Mailing Address

Address Type

| Home | Work | Other |

Street 1

City

State

Zip Code

Done

Mailing Information

First Name

Last Name

Address Info * (0)

Done
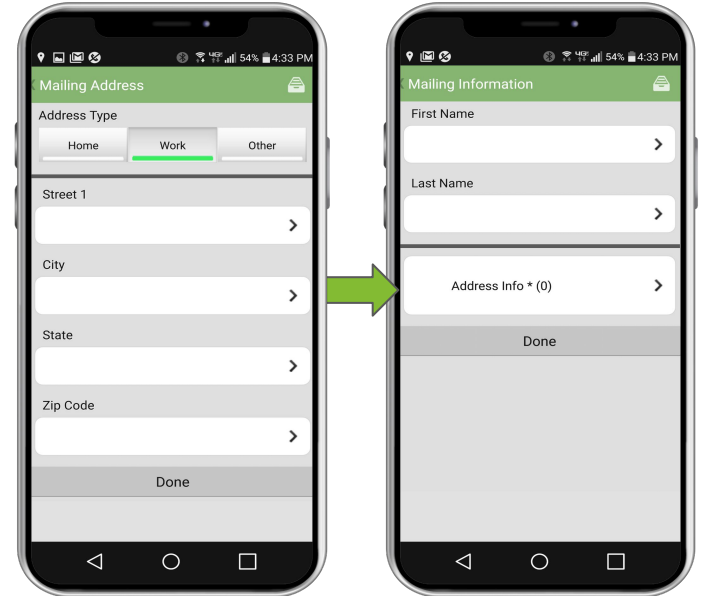
Best Practices

- Have device handy while building forms.

- Open multiple browser windows to eliminate error when copying data column names.

- All forms you create are automatically assigned to your username. (You may want to un-assign collect right for subforms.)

- Limit Amount of Elements on Form.

- Add a "Description" to fields with longer, more in-depth directions.

- Include directions to assist users.

- Follow Form Builder Golden Rules!

POLL

The Elements of Form Building

The Elements of Form Building

Appearance

Standard

Option-Based

Enhancement

Scanning and Hardware

Masking

There are 35+ form building elements to choose from

The Elements of Form Building

Element is equal to…
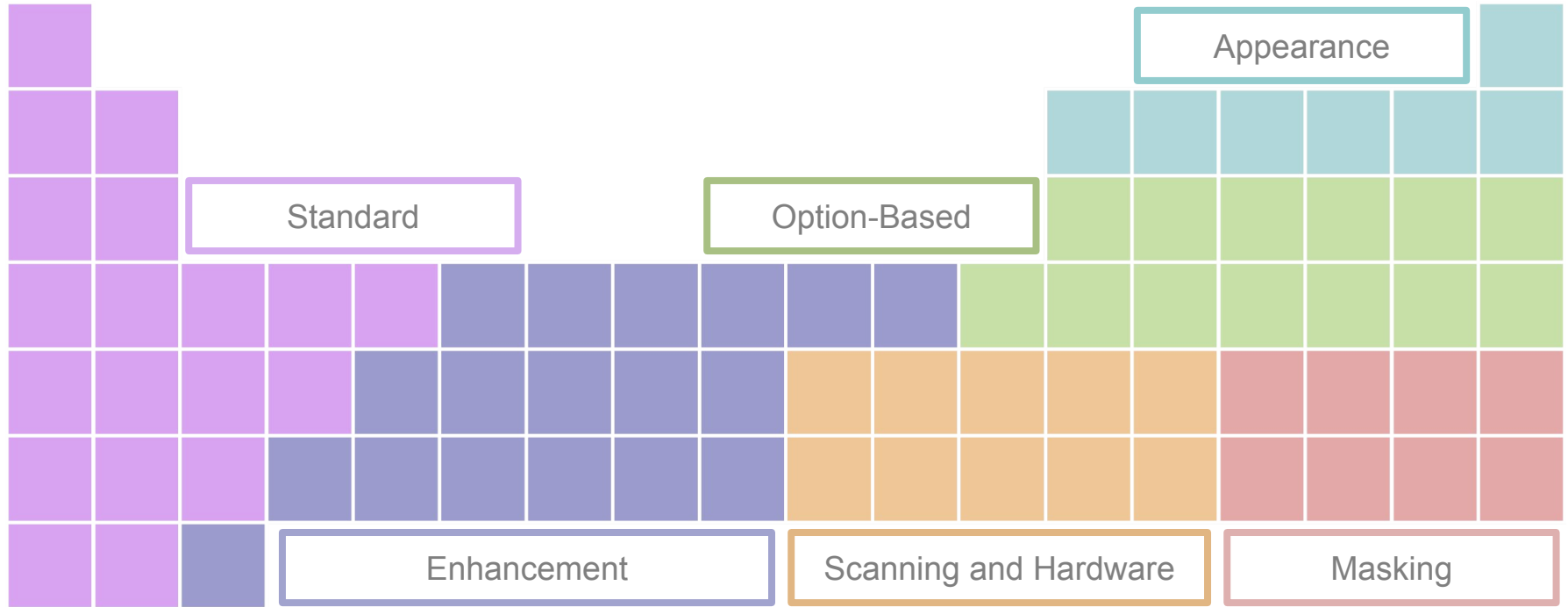**Widget**
Input
Input Type

- **30+ ELEMENTS AND GROWING**
  - Masking
  - Option Lists
  - Enhancements
  - Scanning and Hardware

- **SMART DATA COLLECTION**
  - Reduce user error
  - Accelerate collection speed
  - Homogenize format of data

- **SMART FORM DESIGN**
  - Dynamically populated values
  - Adaptive form routing
  - Client-side validation

3rd Party	ESRI	Magstrip*	SSN	Timer
Assign to	BlueTherm® ETI Thermometer	Manatee Works*	Select (Option List)	Toggle
Attachment	HTTP Request **(Requires Online)**	Multi-Photo	Signature	Unique ID
Counter	Image	Multi-Select (Option List)	Socket Scanner*	Zip Code
Date	Image Label	Number	Sound	
Date-Time	Label	Phone	Subform	
Divider	Linea Pro*	Pick List (Option List)	Text	
Drawing	Location	Range	Text Area	
E-mail	Lookup	Read-Only	Time	

What Are Subforms?

- A Subform is an element that opens another form as part of the record. The original form is referred to as the parent and the subform as the child.

- Use Subforms to break apart lengthy forms or for general information that will be used across multiple forms/projects.

- Use Subforms to create a "one-to-many" relationship where a set of fields may need to be answered repeatedly.

Parent Form

Child Form

Form Building Golden Rules

Golden Rules

1. Test form before going live/deploying to users.
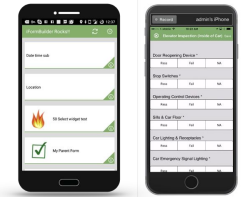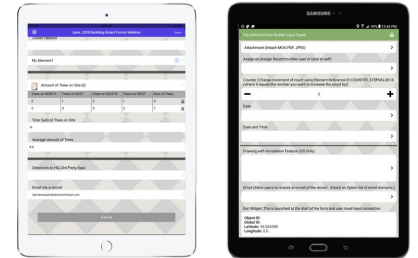
OPERATING SYSTEMS

Test form on all device types iOS, Android, and webforms that users will have access to.

SMALLEST DEVICE

If all text is legible for Select and Toggle element on the smallest device, it will work on larger.

IFORM APP

Build for iForm app version users will have access to. (Easiest way to version control is always use latest version from the app store.)

Golden Rules

TEST, SYNC, AND REVIEW

SMART CONTROLS

TEST EARLY AND OFTEN

Complete the entire form and check option lists and subforms have the correct assignments, no spelling errors, all required fields are assigned and sync to the cloud. Review data feed and check Data Column Names are not my_element_1 etc.

If you have added Smart Controls, submit multiple records meeting all data collection scenarios to test functions are working properly. Test calculations, validation, default values, etc. Different operating systems may call for different smart control statements.

Golden Rules

2. Make sure you use Unique Data Column Names (DCN) that are database friendly (Reserved Word List), or you will not be able to save.

RULE

Element Properties

Common ⊖

Label: ⓘ

Location

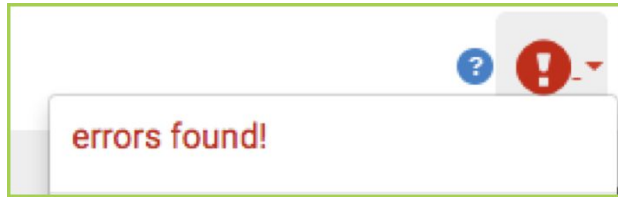**Name** ⓘ

location

* name is a reserved word <u>Learn More</u>

Based on label ☑

errors found!

If DCN is not friendly, and you receive an error message, uncheck "Based on Label" and change DCN. Once you have made the change, you need to clear error message to save the form.

IMPORTANT:
If you are planning on using the API, it is especially important to review the Reserved Word List.

Golden Rules

3. Do NOT change **element type** and **encryption,** on a live form (a form that already has data associated to it). It will DELETE DATA.

Element Properties

Note: Changing "Element Type" or "Encryption" for any element will cause all existing data to be deleted for that element.

Element Type: Text

☐ Encryption ? ☐ Disabled ? ☐ Required ?
☐ Read-Only ? ☐ Hide Typing ?
☐ Personal Data ?

Data size: 50 ?

If you are *no longer* using an element on a live form, or need to change the **Element Type** or **Encryption**, copy the original element and then disable the element on the form.

Make a **Copy** of the original element.

Check the "**Disabled**" box on the original element's Attributes.

You can now make necessary changes to the copy including changing the **Element Type** or **Encryption**. Copying and Disabling the original element will add a new row to your data, and you won't lose any data previously collected. The disabled element is now acting as a placeholder in the data, but isn't being downloaded on the device.

Demonstration

Demonstration

✓ Overview of Form Builder Home Screen

✓ Creating a New Form

✓ Different Form Builder Views

✓ Form Building in the Device View

    ○ How to add elements

    ○ Copy, Edit, Change, Delete Elements

✓ Edit Form Properties: Disable/Enable Forms

Managing Option Lists

Managing Option Lists

Option-based Elements greatly improve the integrity of your data collection. The user will select from a predefined set of options, called an Option List.

Option-Based Elements

- Email
- Multi-Select
- Pick-List
- Select
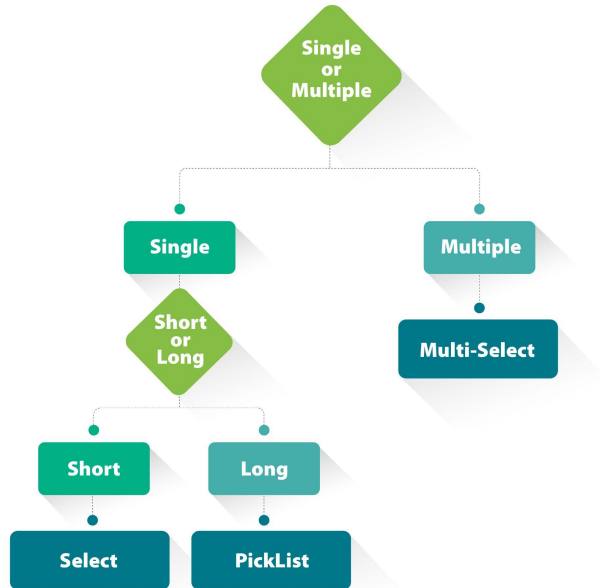
Assign an Option List of approved domain names for an Email element

The resolution of a device can affect the **Select** element's display

Single or Multiple

Single

Multiple

Short or Long

Multi-Select

Short

Long

Select

PickList

Managing Option Lists

Form Builder
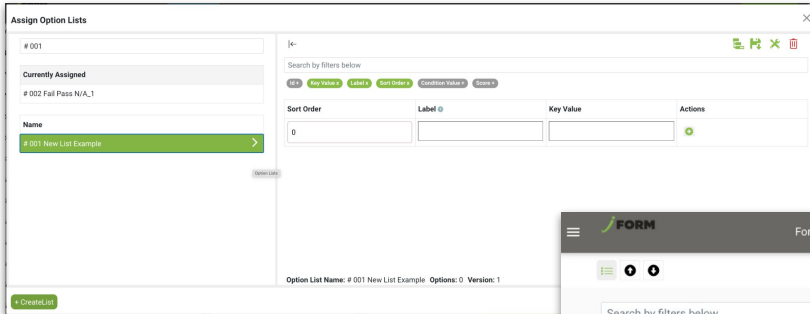
VS.

Option List Builder

- Option Lists can be added in Form Builder with the inline Option List element and in the **Option List Builder**.
- Use the **Option List Builder** for longer lists and edits as it allows for uploading and downloading of the list.
- Make short lists and edits within the Form Builder.

Managing Option Lists

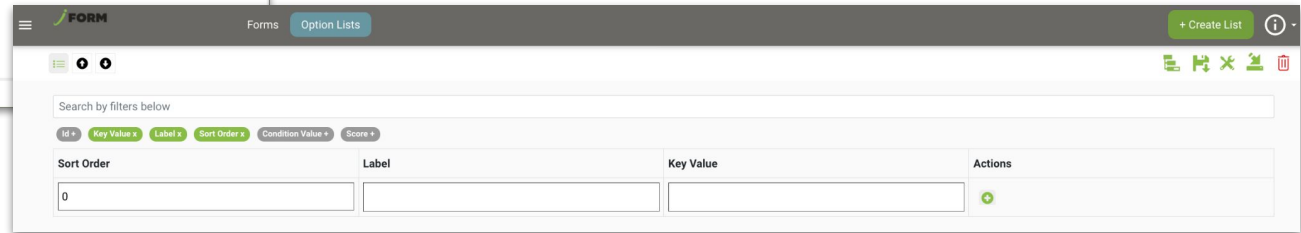- Changing the **Key_Value** or **Sort Order (Index Value)** on a live option list can result in data being hidden in Views.

- Changing the option list **element type** will result in data lose.

Label	Key Value	Sort Order	Actions
Arabic	arabic	0	
English	english	1	
Other	other	2	
		3	

- **Copy** lists to eliminate chance for error when making multiple edits.
  Note: Keep Key Value's the same.

- Form Builder allows for **uploading** of lists, raw or CSV upload.

- Use **ZCDisplayValue** or **ZCDisplayKey** instead of sort order or binary values in Smart Controls.

Managing Option Lists

How to Hide Options in a list.

- Place false in Condition Value to hide an option if no longer in use (and true where the list should show again).

Label	Key Value	Sort Order	Actions
Arabic	arabic	0	
English	english	1	
Other	other	2	
		3	

Understanding Option List Data

- Data Views will always show the label of a response.
- XLS, XLS+ Feeds will show the Sort Order of response.
- XML, JSON, RSS and ATOM Feeds will show the KeyValue.
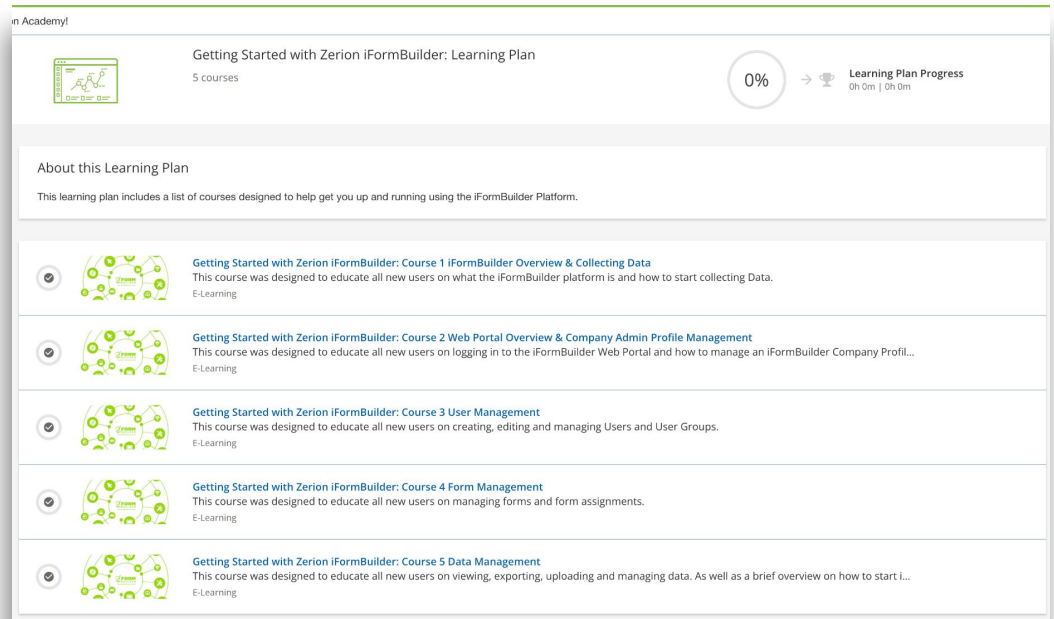
Demonstration

POLL

ANNOUNCEMENTS

- Zerion Academy Asynchronous Courses Now Available!

- Attend Zerion Reimagined Onsite Workshops & Certification: Sept 12-15 in Herndon, VA.

- Upcoming Webinars:
  - August 30 - How to Add Custom Fields to Users
  - 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

on Academy!

Getting Started with Zerion iFormBuilder: Learning Plan
5 courses

0% → 🏆 **Learning Plan Progress**
0h 0m | 0h 0m

About this Learning Plan
This learning plan includes a list of courses designed to help get you up and running using the iFormBuilder Platform.

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 Profil...
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!