

FORM BUILDING 101: THE BASICS







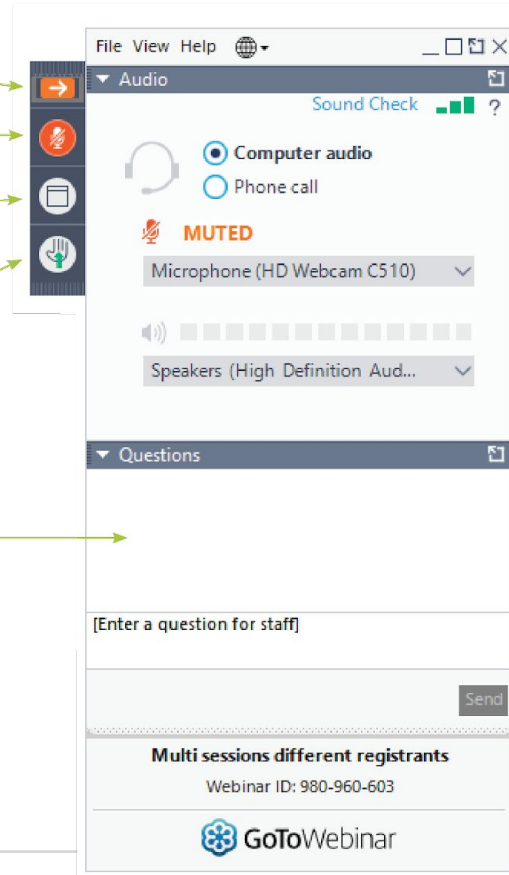
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POLL

Agenda

- Set Up For Success
- The Elements of Form Building
- The 3 Form Building Golden Rules
- Managing Option Lists
- Announcements

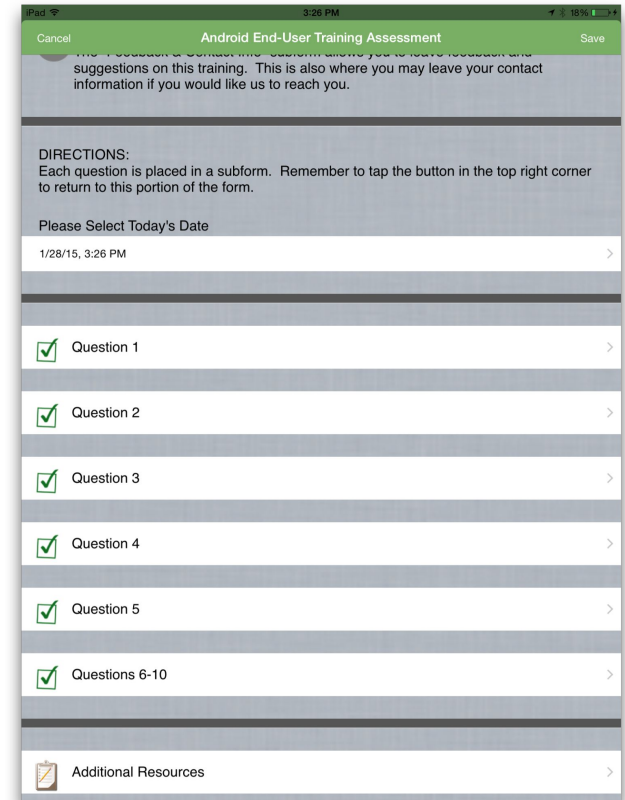


Set Up For Success



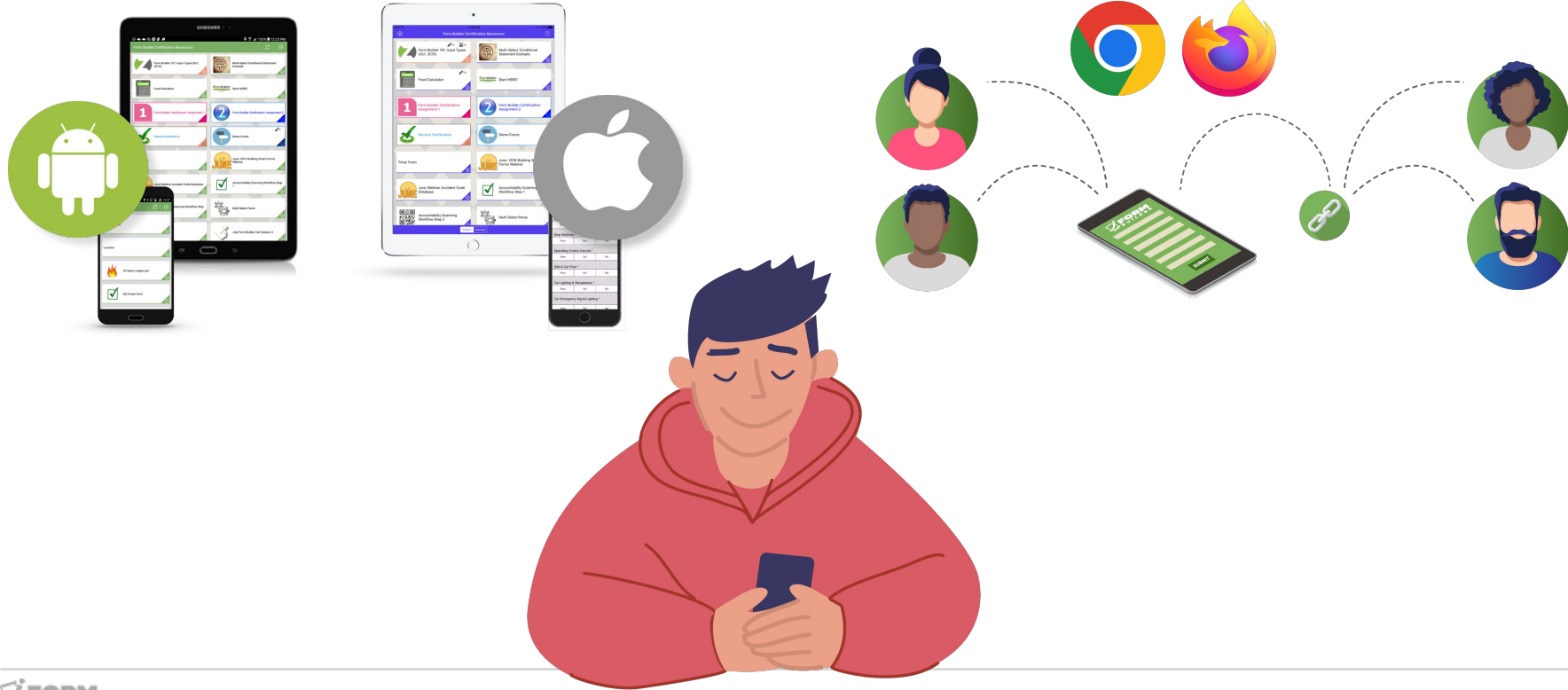
Project Planning

- 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?



The screenshot shows a mobile application interface for an 'Android End-User Training Assessment'. At the top, there is a green header bar with 'Cancel' on the left, 'Android End-User Training Assessment' in the center, and 'Save' on the right. Below the header, there is a grey box containing text: 'Tap the button in the bottom right corner above you to save feedback and suggestions on this training. This is also where you may leave your contact information if you would like us to reach you.' Below this is a section titled 'DIRECTIONS:' with the text: 'Each question is placed in a subform. Remember to tap the button in the top right corner to return to this portion of the form.' Underneath is a prompt 'Please Select Today's Date' followed by a date and time '1/28/15, 3:26 PM' and a right-pointing arrow. The main content area consists of a list of questions, each with a green checkmark icon on the left and a right-pointing arrow on the right. The questions are: 'Question 1', 'Question 2', 'Question 3', 'Question 4', 'Question 5', and 'Questions 6-10'. At the bottom of the list is an 'Additional Resources' section with a clipboard icon on the left and a right-pointing arrow on the right.

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



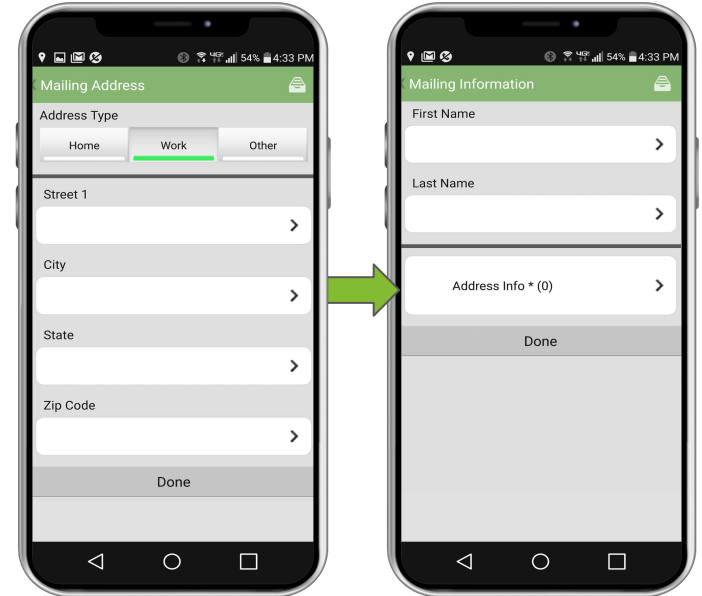
Parent/Child Naming

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



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!



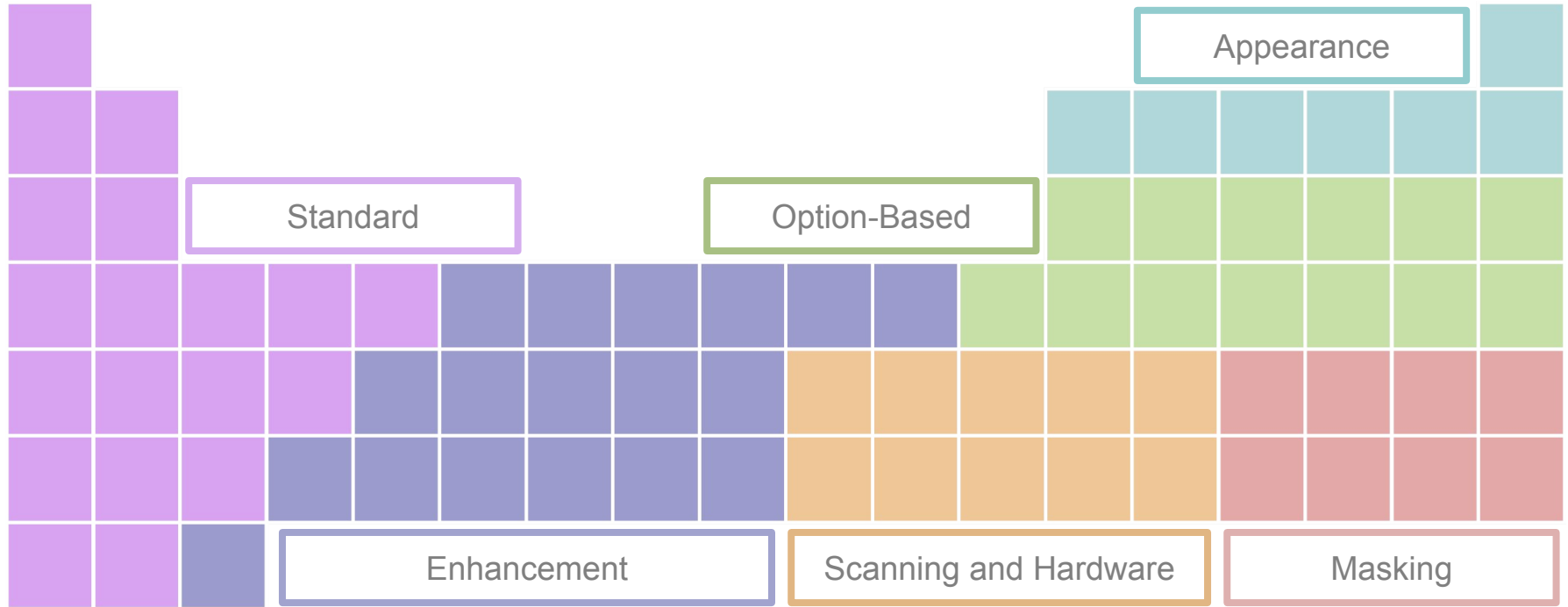


POLL

The Elements of Form Building



The Elements of Form Building



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

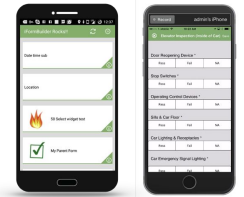
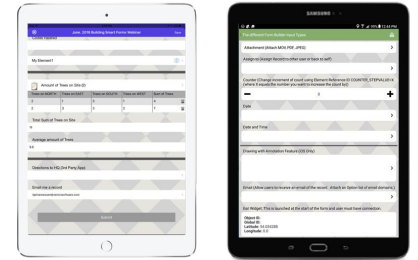
Test form on all device types iOS, Android, and webforms that users will have access to.

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



1. Test (Continued...)



**TEST, SYNC,
AND REVIEW**

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.



**SMART
CONTROLS**

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.

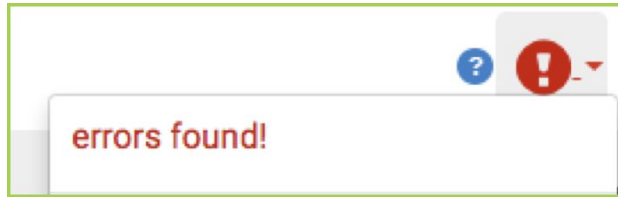
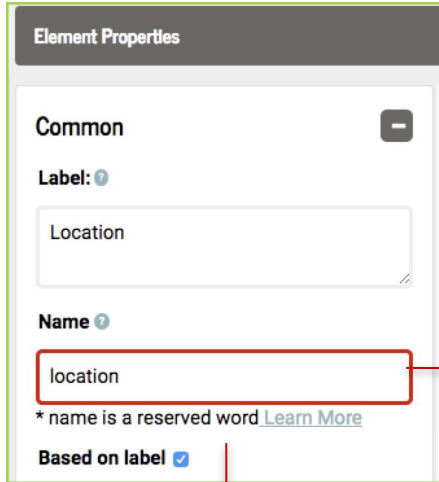


**TEST EARLY
AND OFTEN**

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.



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

2022 Test Form

Type Address

A Text

Copy selected element and paste directly below copy.

Capture Location

Location

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

Type Address

A Text

Capture Location

Location

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

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

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

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.

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

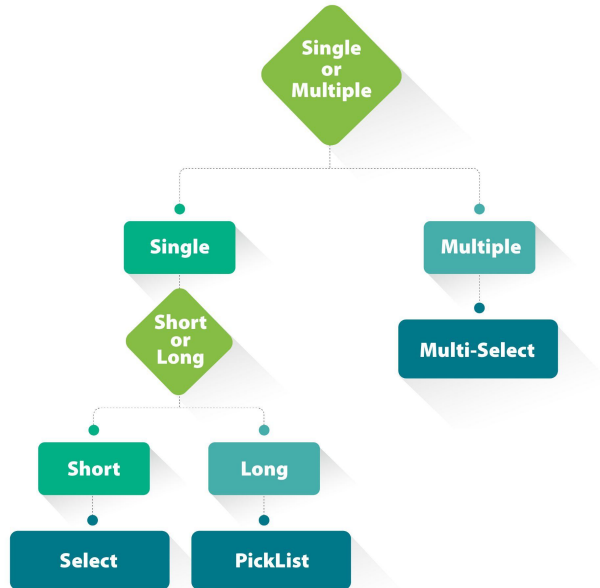


Managing Option Lists

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](#)

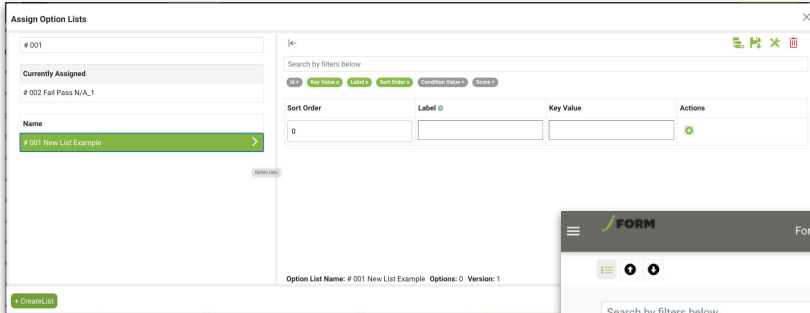


Assign an Option List of approved domain names for an Email element

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

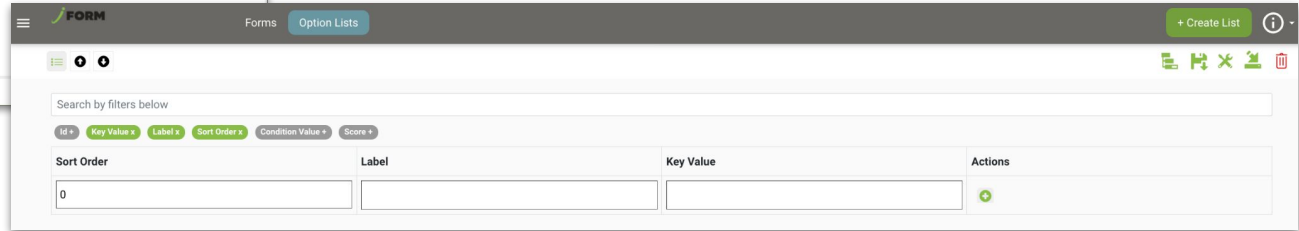
Managing Option Lists

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	 
<input type="text"/>	<input type="text"/>	<input type="text" value="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	 
<input type="text"/>	<input type="text"/>	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 Key Value.

Demonstration





POLL

ANNOUNCEMENTS



- Zerion Academy Asynchronous Courses Now Available!
- Upcoming Webinars:
 - 4/25: Form Building 102: The Building Blocks of Smart Controls
 - 5/22: Zerion AI with CEO Sze Wong

save the date

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THANK YOU!



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