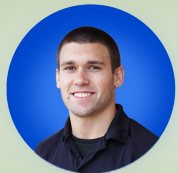


ZERION REIMAGINED



iFormBuilder Integration with Microsoft SharePoint, Dataverse, and Power BI



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AGENDA

- Welcome & Intros
- Integration Challenges
- The Solution
- Live Demo
- Q&A

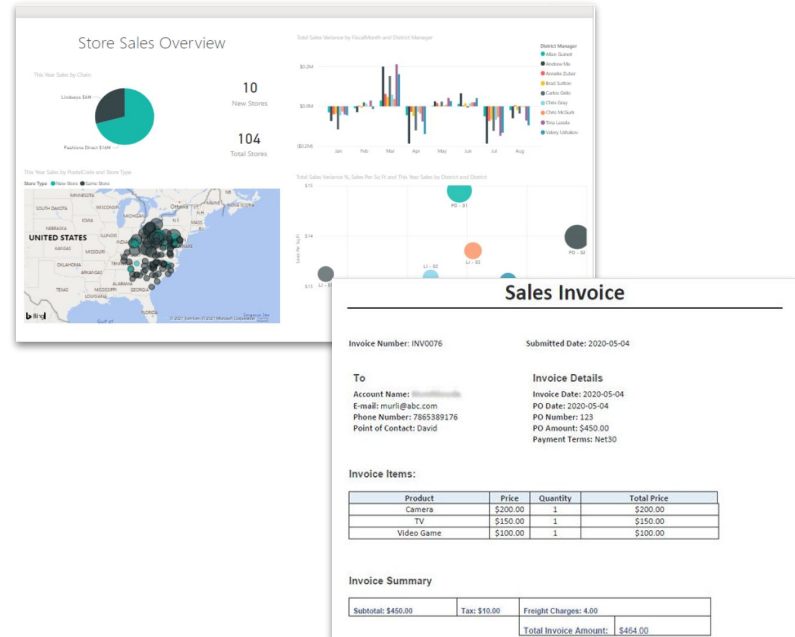


About CDG | Critical Data Group

- We help iFormBuilder / Zerion Customers leverage the good data collected with the right tools.
- Optimize workflows and help organizations think beyond paper to digital.
- Leverage organizations existing tools whenever possible.
- Help organizations with their post data collection workflows.
- Create tailored tools that drive efficiency.

Some Solutions **CDG** | Critical Data Group **Delivers...**

- Custom Dashboards using Power BI
- Integration with Microsoft 365 (Sharepoint and Dataverse)
- Custom PDF and Word Documents
- Custom Automation Solutions leveraging AI to increase operational efficiency
- Custom Connectors



POLL



How often do you report on your data?

- Daily
- Monthly
- Yearly
- Never but I'd like to



How do you report on your data?

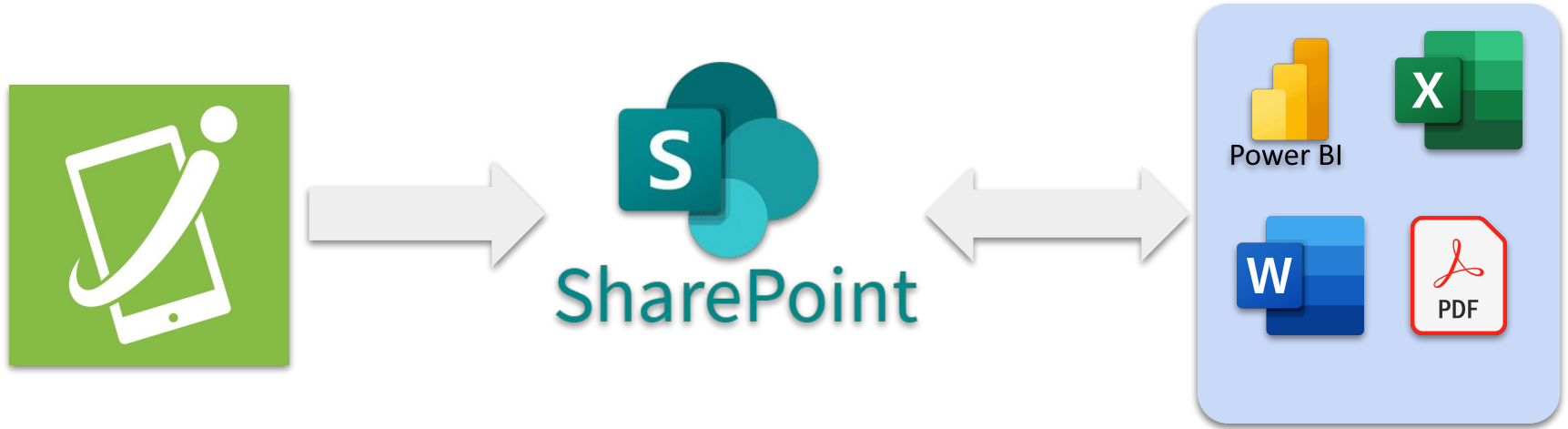
- Excel
- Power BI
- Other Reporting Tools

The Reason We're Here Today?

Integrating iFormBuilder Data into your Microsoft Environment

**It's costing you time, money and frustration.
You need real time reporting to make decisions.**

SharePoint Integration for Smarter Data Utilization



Current Challenges with iFormBuilder Data Integration



Challenges Integrating Your Data

- **Time-Consuming and Costly Process**
 - Manually downloading iFormBuilder data and importing it into Excel or reporting systems wastes valuable time.

Time Spent Moving Data	# of Forms	Monthly Time Spent	Annual Time Spent
5 Hours Per Month / Per Form	50 Forms	250 Hours	3,000 Hours

That's because...

- **This has to be done for every form**
 - Repeating this manual process for every new form & update is inefficient and unsustainable, especially as data grows.
- **Lack of Developer Resources to Automate.**
 - Lack of developer resources makes integrating directly with the API difficult, hindering automation and efficiency.

Your Options



Manually Move the Data

Pros:

- **Full Control:** Allows you to control exactly what data is moved and how it's formatted.
- **Simple to Implement:** No need for technical setup or maintenance; you just export and import data as needed.

Cons:

- **Time-Consuming:** Manual processes can be slow, especially for large datasets or frequent updates.
- **Error-Prone:** Human errors are more likely to occur when handling data manually.
- **Not Scalable:** As the number of forms or data increases, the process becomes less manageable.
- **Inconsistent Updates:** Data might not be up-to-date if manual processes aren't performed regularly.

Power Automate to Integrate Data to Sharepoint



DEMO



Power Automate to Integrate Data to Sharepoint

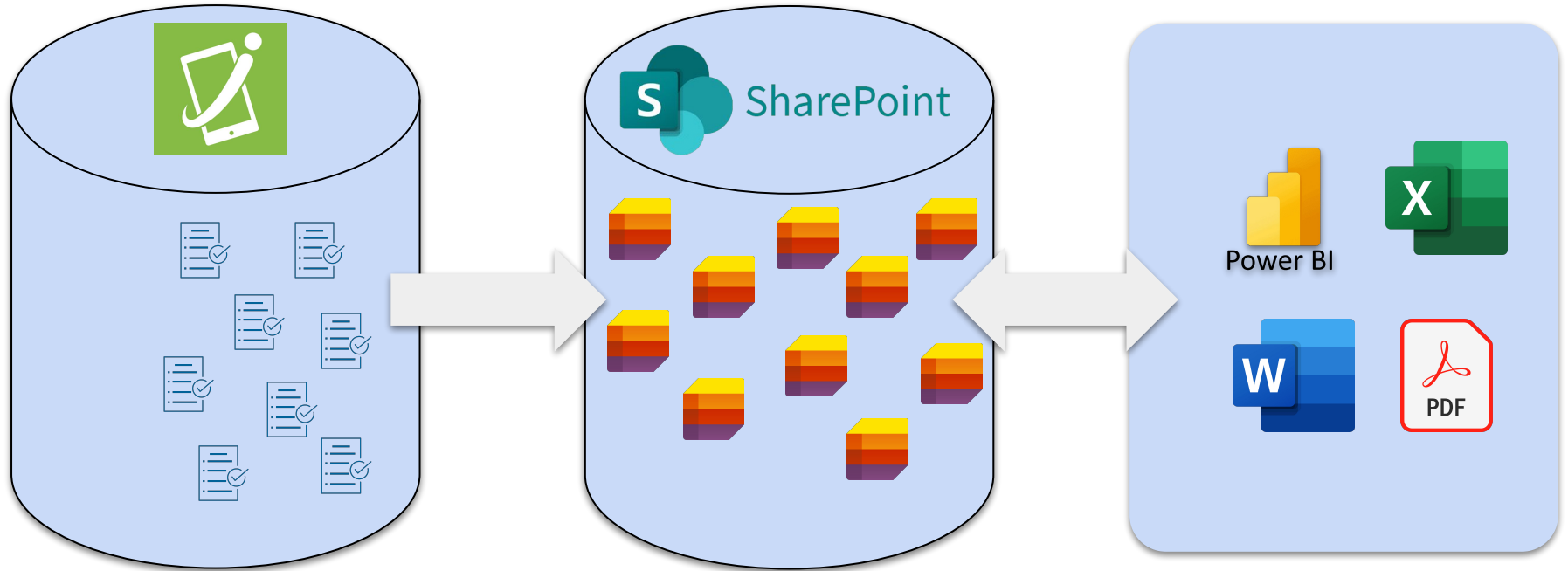
Pros:

- **Automation:** Reduces manual work by automating data transfer between iFormBuilder and SharePoint.
- **Flexible:** Allows customization for each form, including data transformation, filtering, and error handling.
- **Integration Capabilities:** Power Automate can connect to other services, offering more flexibility in workflows.
- **Notifications and Triggers:** Can set up alerts or trigger actions based on specific data changes or updates.

Cons:

- **Challenging Setup:** Each form requires its own automation, meaning any updates to forms need corresponding updates in Power Automate.
- **Potential for Errors:** Misconfigurations or overlooked updates in automation can cause data sync issues.
- **Performance Limits:** Power Automate has limitations on the number of runs and data volume, especially with free or lower-tier plans.
- **Complexity with Many Forms:** Managing automations for many forms can become complex and hard to track.

CDG Connector



DEMO



CDG Connector

Pros:

- **Hands-Off Syncing:** Automatically creates and syncs SharePoint lists with iFormBuilder, requiring little to no manual intervention.
- **Efficient:** Ensures data is always up-to-date without manual updates or complex automation flows.
- **Scalable:** Easily handles multiple forms and frequent updates without additional setup.
- **Consistent Structure:** The connector maintains data consistency by mirroring the form structure in SharePoint.

Cons:

- **Costs:** Monthly costs to run the connector
- **Limited Customization:** Might not support complex scenarios or specific business rules beyond basic data syncing.
- **Less Control:** Limited ability to customize the data transformation process; you're dependent on the connector's capabilities.

Recap of What we Covered

Power Automate for Data Integration

1. Setup Webhooks
2. Receive Data from iFormBuilder
3. Create your Sharepoint List
4. Map your Data into Sharepoint

For those of you looking to setup custom integrations per form this is a great option for you.

CDG Connector

1. iFormBuilder Forms Sync to Sharepoint Lists
2. iFormBuilder Records Sync to Sharepoint Lists

For those looking for Hands Off Data Syncing for All historic, current & future Forms this is a great option for you.

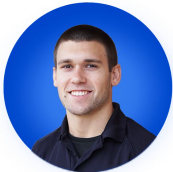
Sharepoint Integration Options Summary

	Time Savings	Value
Manually Move Data	Low	Significant Time required for every data refresh and update; not efficient for frequent changes. <i>**Best for infrequent updates</i>
Power Automate	Moderate	Saves time with automation but each form requires updates, maintenance and expertise in using Power Automate/Integration Tool. <i>**Balanced Good time savings but requires upkeep per form.</i>
CDG Connector	High	Maximizes time savings with seamless, hands-off data syncing; minimal upkeep. <i>**Ideal for ongoing, frequent data syncing.</i>

Connect your Data Today



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QUESTIONS



