



February 22, 2017

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Announcements

News & Updates



Zerion Academy



Form Builder Certification

April 4, 5, 6; 10:00 AM - 12:00 PM EST

Upcoming Webinars

3/2/17



An Introduction to Zerion Identity Management

3/16/17



Zerion Spotlight on Customer Solutions

3/29/17



Getting Started with Data Integrations

About the Webinar

**Presenter:
Jonathan Hsu**

ESSENTIALS FOR PROJECT MANAGERS

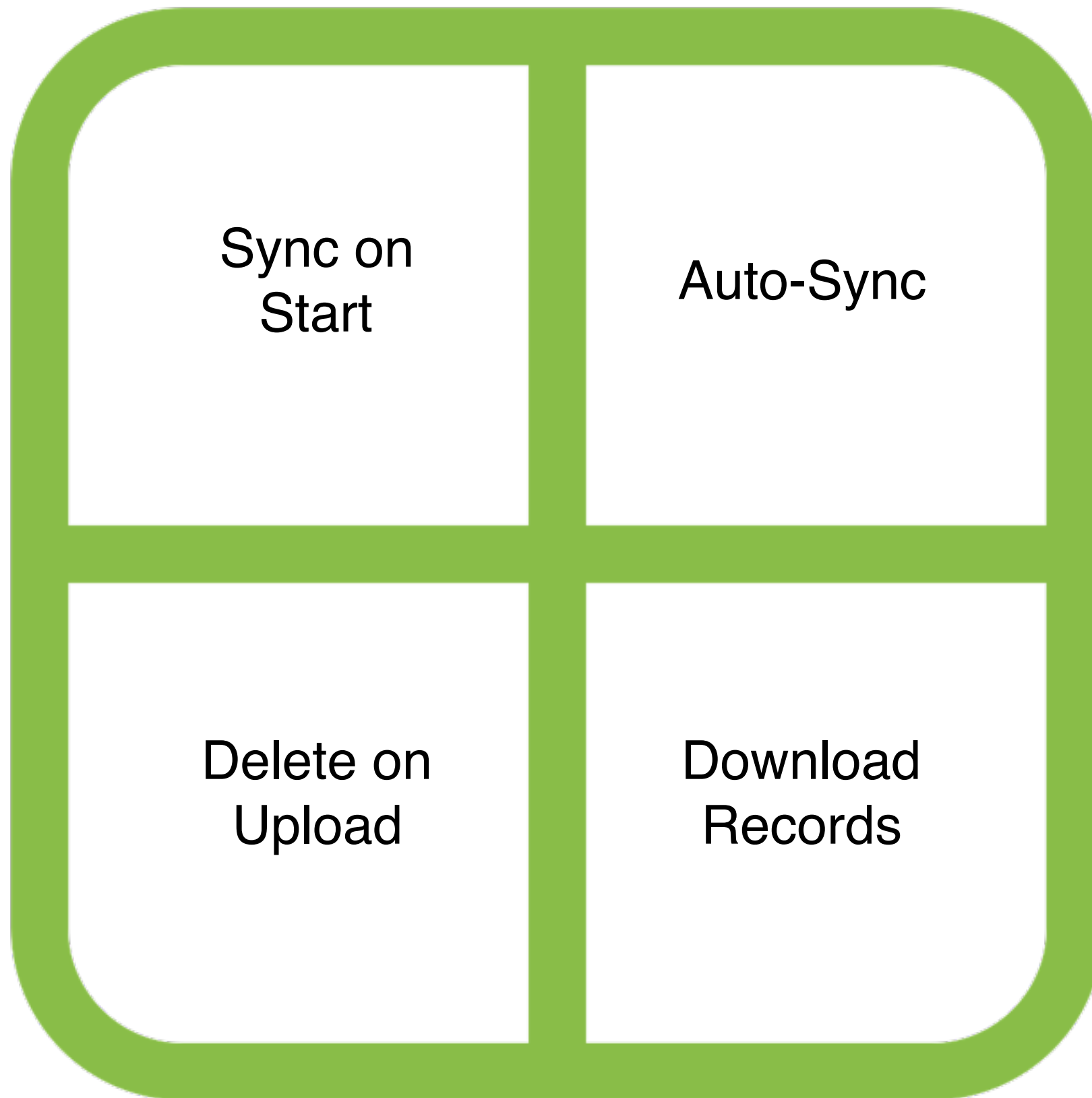
- ▶ Managing Devices
- ▶ Managing Data
- ▶ Managing Users/Forms
- ▶ Managing Workflow



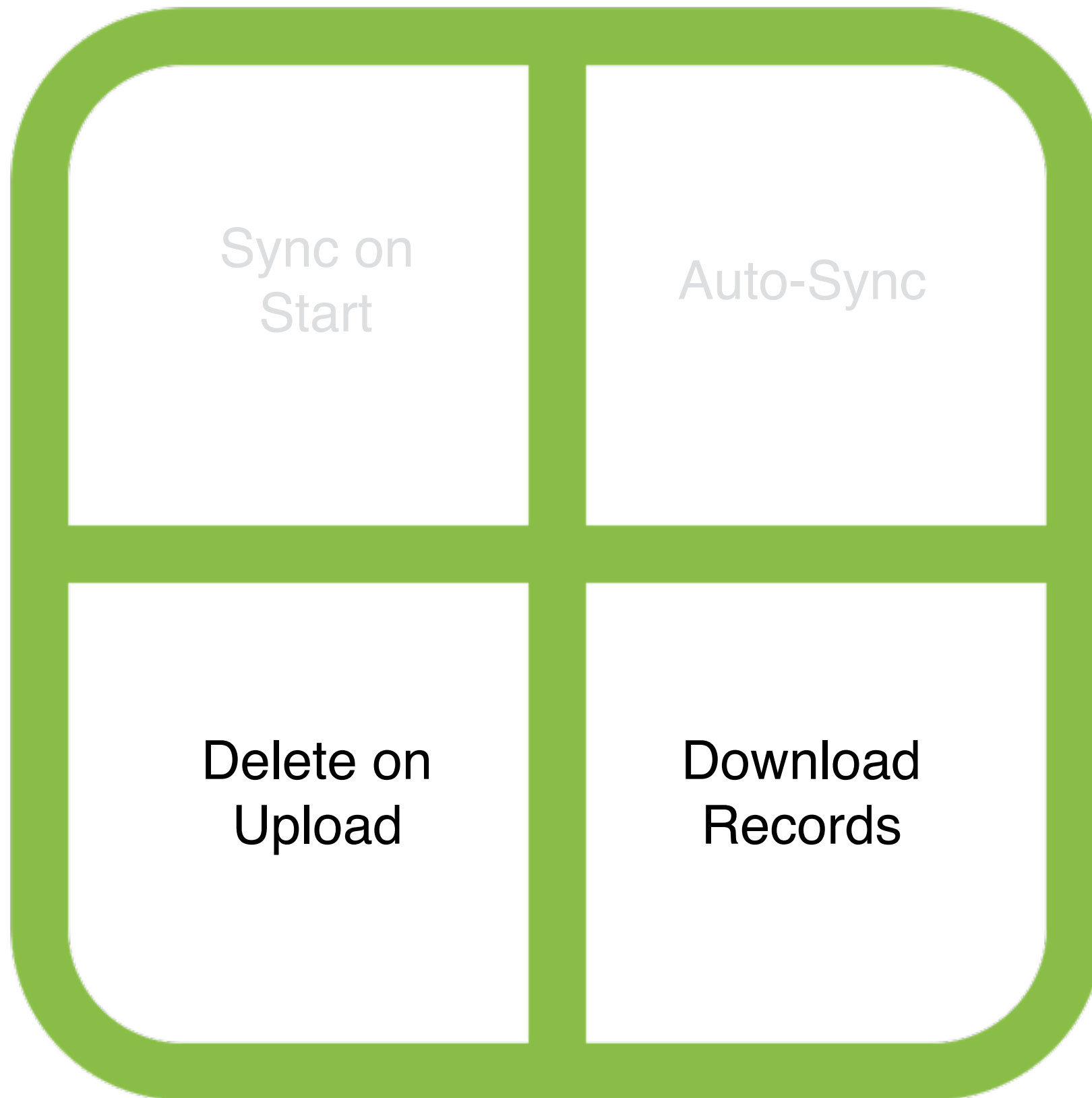
MANAGING DEVICES

Understand the trade-offs of different device configurations

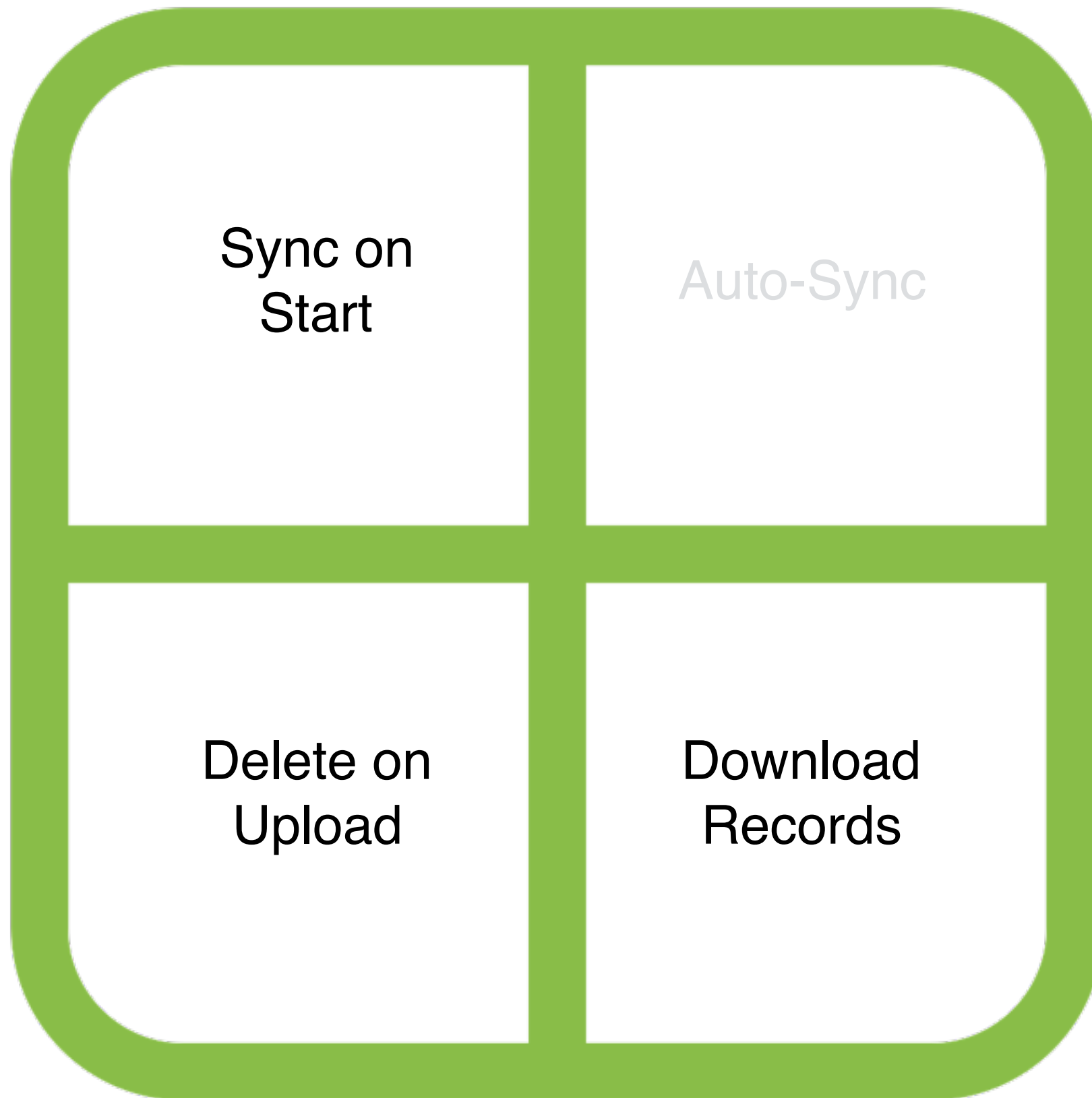
Synchronization Settings



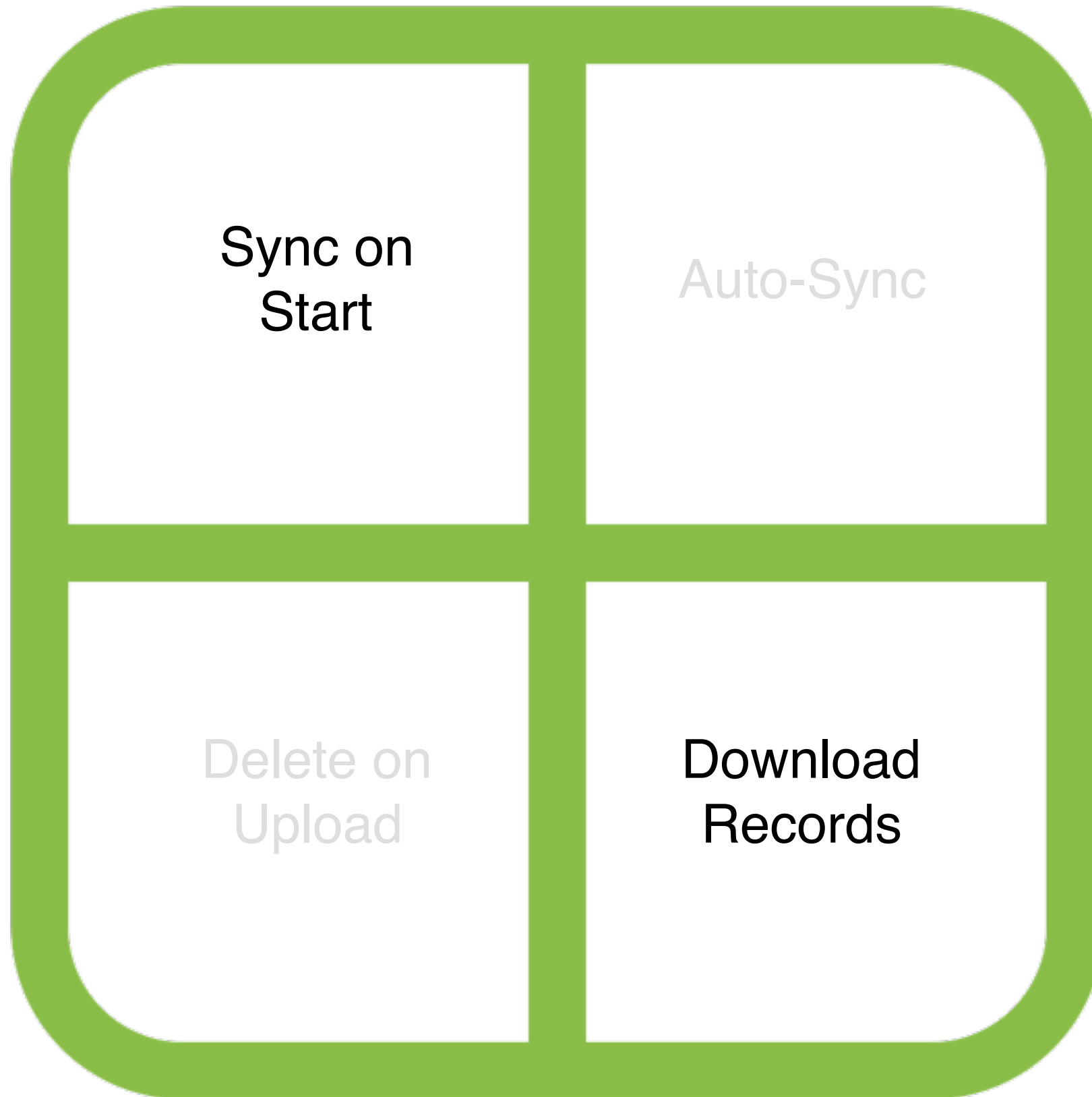
Zero Connectivity



Start the Day in the Office



Keep for Reference



Other Settings

DEVICE PERMISSIONS

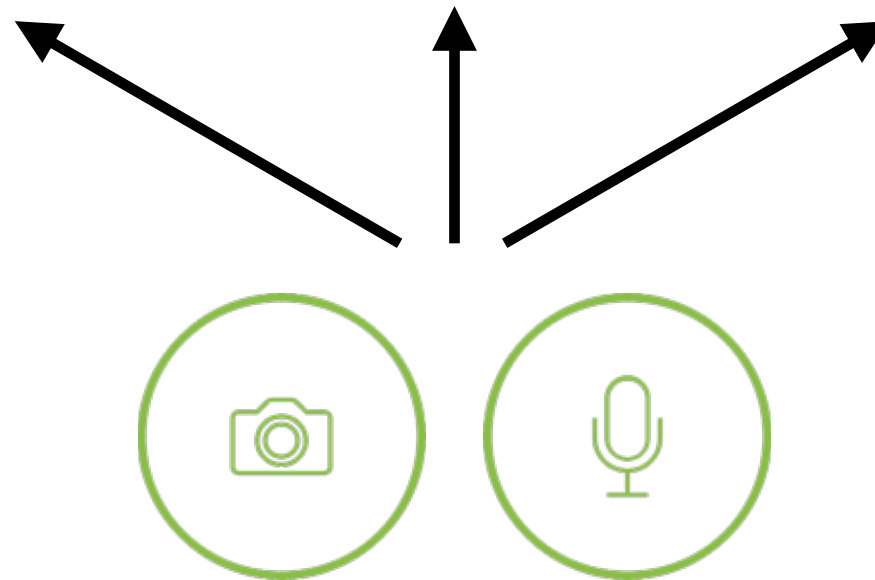


MISCELLANEOUS SETTINGS



The Drawing Element can drastically impact sync times

Media Configurations



Zerion Storage can be restricted to only allow media file access via the API

MANAGING DATA

Properly export data and utilize built-in reporting features

Exporting Data

DATA VIEWS

"Human readable"

Element and Option
List Labels

Basic Reporting Views



DATA FEEDS

"Machine readable"

Data Column Names
and Key Values

Record & Image
Metadata



Email and Document Generation

SEND EMAIL

Email Element

Email Alert



CREATE DOCUMENT

HTML Data View

PDF Data View



MANAGING FORMS & USERS

Setup a scalable solution to collection assignment

Form Groups & User Groups

Granting collect privileges for forms one user at a time is not a scalable solution. User Groups define sets of users and Form Groups define sets of forms to improve the scalability of form/user assignment.



User Group ↔ **Form Group**



Add `_group` to the end of names for clarity

MANAGING WORKFLOW

Automate processes and accelerate your
workflow

Automating Workflows

API



POST URL



**DATAFLOW
AUTOMATION**



zapier

Summary

Essentials for Project Managers

- 1** Mastering Device Settings
- 2** Exporting Data & Built-in Reporting
- 3** Organizing Forms and Users
- 4** Automating Your Workflow

Helpful Links

Links For More Information

[Getting Started with the API](#)

[Dataflow Automation Overview](#)

[Customizing Emails](#)

[Creating an Endpoint](#)

[Connecting iFormBuilder & Zapier](#)

THANK YOU



In 48 hours, you will receive an email with access to:

- Recording of Session
- Session PDF
- Form Package

NEXT WEBINAR

An Introduction to Zerion Identity Management

March 2, 2017, 11:00 AM EST

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