

4 Ways to Supercharge Your Forms



Webinar

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Announcements

News & Updates



Form Builder Re-Certification: May 23 & 25
Form Builder Certification: June 20-22



Release of Zerion Documents

Upcoming Webinars

5/2/17



Transformation Tuesdays

5/10/17



Unlocking the New Form Builder

5/31/17



Saving Time with Dataflow Automation

About the Webinar

**Presenter:
Jonathan Hsu**

4 WAYS TO SUPER CHARGE YOUR FORMS

- ▶ Reference IDs
- ▶ Option List Icons
- ▶ Smart(er) Table Search
- ▶ Parsing Location Data



PAGE-LEVEL REFERENCE IDS

Modifying Default Behaviors

What are Reference IDs?

Reference IDs are a library of settings and flags used to alter the behavior and appearance of a form or element.

Setting = Reference ID that requires specific value

Flag = Reference ID that does not require additional information

PAGE-LEVEL REF ID

Affect how the form behaves/appears

Configured in Form Settings

ELEMENT REF ID

Affect how an element behaves/appears

Configured in Element Properties

Form Reference IDs

Reference IDs 1-5

- 1** Form Interaction Rules | Setup Kiosk Mode
- 2** Subform Table Display
- 3** Customize Form Details
- 4** Override "Delete on Upload" Device Setting
- 5** Adjust Form Coloring

Reference ID 1

PAGETYPE_DAILYSUBMISSION	Only one record can be submitted for that specific date. *
PAGETYPE_TIMEAWARE=9:00-19:00	Form is only available on the device during this timeframe. *
PAGETYPE_SINGLESUBMISSION	Only submit one record per form. If this flag is applied to a form that has one or more records collected you will not be able to collect any records from the device.
PAGETYPE_NEWFROMLASTRECORD	Pre-populate field data from last submitted record in new record. *Need to have a local record on the device to create copy from. Turn off 'Delete on Upload' in Device Settings)
PDF_SUBFORM_NEW_PAGE	Create new page for subform(s) in PDF report
PAGETYPE_DWINDLINGOL=element_index	This flag removes options from a list after they have been selected. To use, define which element should assume this property (defined by the index value). *NOTE: Option is only removed after a successful sync with the server. *
PAGETYPE_INFO	No new record is created for the form and no data is uploaded from the device. Mainly for use with informative forms. (**Requires 4.2 client**)

* Available on iOS only

Reference ID 2

The **DISPLAYORDER** Reference ID modifies which elements are shown in the summary table. Refer to the element by its sort order.

DISPLAYORDER =



Individual Team Member			
Choose the	Did you make	Are you	
Caroline	5	5	
Scott Carter	5	5	
Kevin Ellison	5	5	

SORTORDER =



The **SORTORDER** Reference ID modifies the ordering of subform records in the table. Refer to elements by their sort order. Add 'D' to order descending.

Make sure to set the Reference ID on the child form!

Reference ID 3

Customize the form details shown when pressing the info icon.

FORMINFO_PROPERTYLIST =

version	<i>Version number of the form.</i>
created_by	<i>Who originally created the form.</i>
created_date	<i>When the form was originally created.</i>
modified_by	<i>Who was the last one to change the form.</i>
modified_date	<i>When the form was last changed.</i>

FORMINFO_CUSTOMPROPERTYLIST=version,modified_date,
modified_by,Custom Information,Customizable,Custom
Information2,Customizable2

Display will vary between iOS & Android

Reference ID 4

Set a flag to override the "Delete on Upload" synchronization setting

RECORD_DELETE_ON_UPLOAD

every completed record will be deleted from the device once synced

For forms with sensitive data

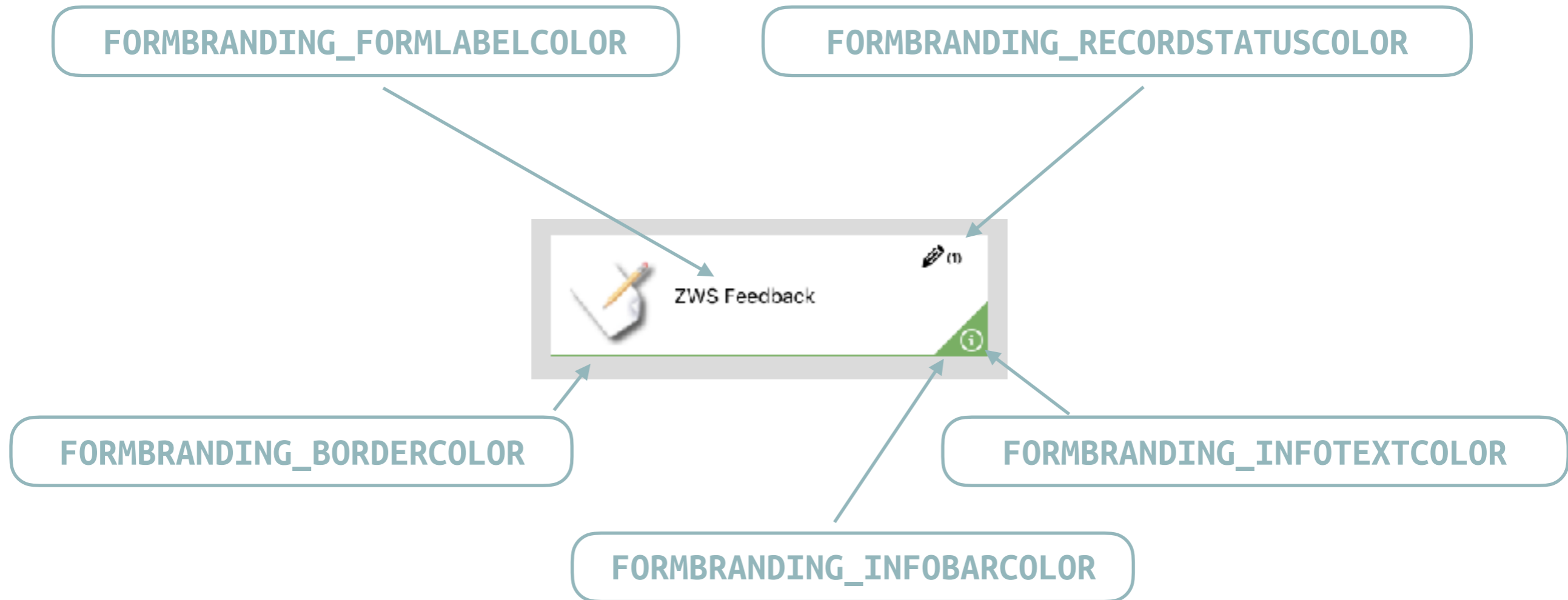
RECORD_NO_DELETE_ON_UPLOAD

every completed record will be saved on the device

Use together with **PAGETYPE_NEWFROMLASTRECORD**

Reference ID 5

Modify the color of the form for branding purposes or to organize a list of forms.



All values are 6-digit Hexadecimal RGB colors

OPTION LIST ICONS

Improve the Aesthetics of Your Form

Including Images in Your Form

Using Dropbox

- 1** Link a Dropbox Account (Media Configuration)
- 2** To reference a folder, use `dropbox://folderStructure`
- 3** Format images and file names `<dcn.png>` `<key_value.png>`
- 4** Add folder reference in `Form Properties > Form Icons URL`
- 5** Add folder reference in `Option List Properties > Option Icons`

Ensure you limit icon sizes

Including Images in Your Form

This screenshot shows the initial state of the 'ZWS Feedback' form. It includes a header with a back arrow, a title 'ZWS Feedback', and a 'Save' button. Below the header are three input fields: 'First Name *' (containing 'Jon'), 'Last Name *', and 'Email Address *'. A section titled 'What is your favorite Zerion Web Service?' displays five icons with labels: 'Data Collector', 'Dataflow Automatic', 'Reports', 'Documents', and 'Identity+Access M'. Below this is a section 'I'd like to leave additional feedback for the following Zerion Web Services' with a right-pointing arrow. At the bottom, there is a 'Done' button.

This screenshot shows the same 'ZWS Feedback' form as the first, but with a large, semi-transparent green speech bubble graphic overlaid on the top half of the screen. The form fields and service options are still visible behind the graphic.

This screenshot shows the 'ZWS Feedback' form with a dropdown menu open over the 'What is your favorite Zerion Web Service?' section. The dropdown menu contains a search bar and a list of service options: 'Data Collector', 'Dataflow Automation', 'Reports', 'Documents', and 'Identity+Access Management'. A 'Select' button is located at the bottom of the dropdown. The form fields and other UI elements are visible in the background.

SMART TABLE SEARCH

Ways to Trigger a Lookup Table

What is a Smart Table Search?

Smart Table Search allows a set of local records to be used as a lookup table to auto-populate form elements.

- Choose from pre-defined values
- Leverage existing data
- Minimize data entry
- Improve data integrity

Defaulting a Smart Table Search

Smart Table Search allows a set of local records to be used as a lookup table to auto-populate form elements.

Challenge: Smart Table Search will not execute at form load

Solution: Use a Select or Toggle Element to "trigger" the Smart Table Search's default value

Dynamic Value of Smart Table Search

```
if(start_trigger == 0) { first_name = iformbuilder.username } else  
{first_name = ""}
```

Default Lookup Value

Clear Lookup Value

Data Column Name of Select

Bonus: Scanning + Smart Table Search

Smart Table Search allows a set of local records to be used as a lookup table to auto-populate form elements.

Challenge: Manually searching through a set of records is too slow

Solution: Use scanning technology to accelerate data entry

SCANNING ELEMENT

Hardware Elements:

Manatee Works

CAPTURE RAW DATA

Dynamic Value:

`dcn.raw`

SET UP STS

Disable PickList Ref ID:

`DISABLE_LIST`

LOCATION PARSING

Parse Out Complex Data Structures

Location Element

The Location element captures GPS information that can be individually accessed.

Challenge: Location data can be difficult to parse after collected

Solution: Use Text Element to create JSON Object



Latitude:	38.957425
Longitude:	-77.414416
Altitude:	106.655716
Speed (m/s):	-1.000000
Horizontal Accuracy (m):	65.000000
Vertical Accuracy (m):	10.000000
Time:	3:43:22 PM EDT

[Refresh](#)

```
{  
  "latitude" : 38.95,  
  "longitude" : -77.41  
}
```