Getting Started with Form Building

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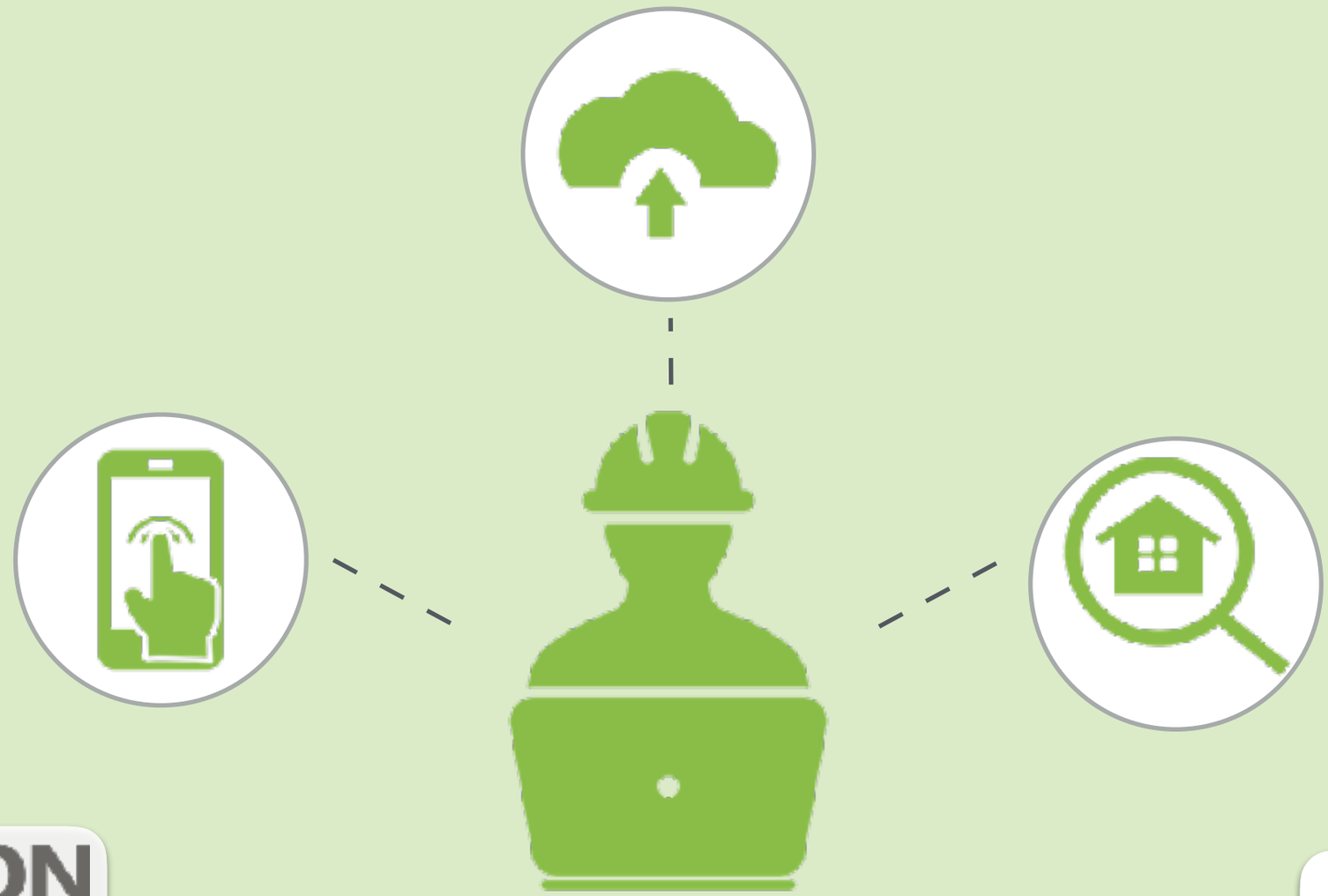

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What's New?

News & Updates

- The Role of Support: Making the Most of Field Service Solutions
- Locating Water Infrastructure More Easily

Upcoming Webinars

11/16/17		What Can I Do With APIs?
11/29/17		Cooking with Zerion
12/13/17		Hot Links

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About the Webinar

GETTING STARTED WITH FORM BUILDING

- Setting Up Your Workspace
- Elements of Form Building
- Using Option Lists
- 3 Golden Rules

Solutions Engineer
Training & Implementation

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Setting Up Your Workspace

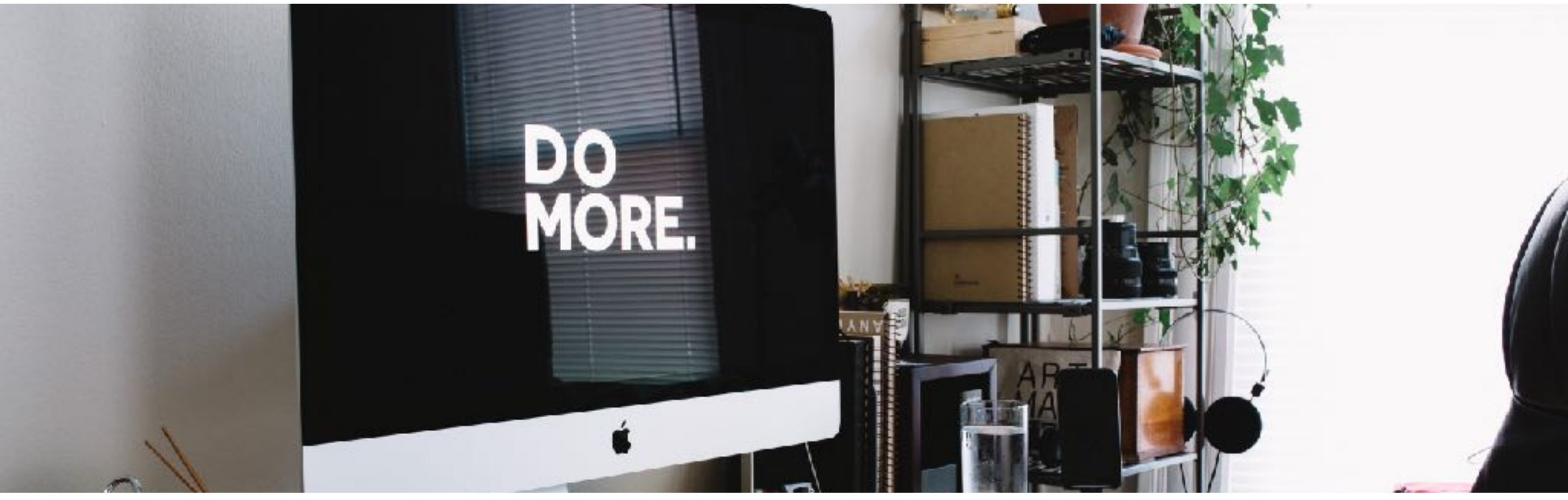

Photo by Carl Heyerdahl on Unsplash

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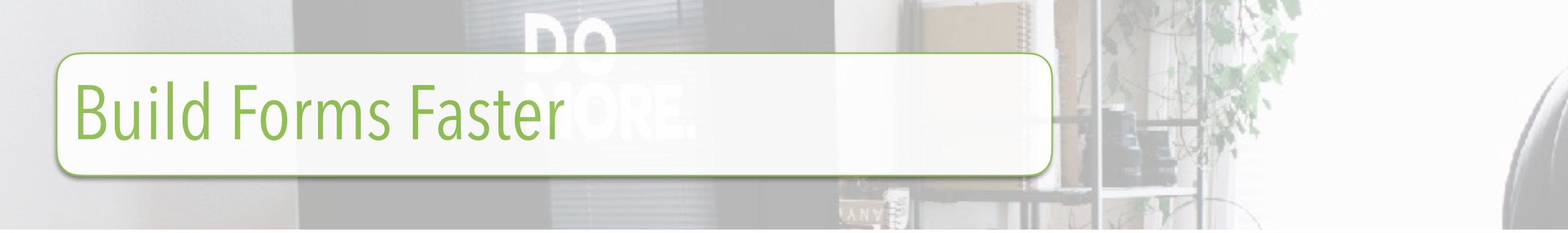

Build Forms Faster

Accelerate your form building by using multiple tabs

Open the Option List Manager to edit existing Option Lists and upload CSV templates

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Device View vs. Table View

Device View to rapidly add elements or to view the full details of a single element

Table View for copy/paste and seeing the relationship between elements

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The Elements of Form Building

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Substituting Paper for Mobile

Standard Elements provide a similar experience to traditional pen-and-paper fields.

Choose Elements to...

- Simplify collection for field inspectors
- Reduce opportunities for incorrect data entry
- Automate data collection
- Homogenize data
- Minimize unnecessary interactions with the form

Standard Elements

- Counter
- Date
- Date-Time
- Number
- Range
- Read-Only
- Signature
- Text
- Text Area
- Time
- Timer
- Toggle

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Augment with Mobile Features

Enhancement Elements extend the capability of your data collection to leverage the functionalities of your mobile device.

Use the Assign-To element to send an in-progress record to another user

Open an external webpage with the Attachment element

The Image element allows you to take picture or select a saved image. The Drawing element allows annotations on the image.

Enhancement Elements

- 3rd Party
- Assign-To
- Attachment
- Drawing
- ESRI
- Image
- Location
- Sound
- Subform
- Unique ID
- URL Scheme

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Scan, Collect and Save Time

Scanning & Hardware Elements enable data collectors to use external scanning hardware or their camera to scan codes.

Scanning & Hardware Elements

- BlueTherm Temp Probe
- Linea Pro
- Manatee Works
- QR Code
- Socket Scanner

Combine a Scanning element with Smart Table Search for automated lookup

Standardizing Flexible Inputs

Masking Elements require the user to enter data in a specific format. Standardizing values will reduce user error.

Masking Elements

- Phone
- Social Security Number
- Zip Code

The Social Security Number element is the most flexible of the three.

Masking Character	Allowed Input
#	Only Numeric
?	Only Alphabetic
A	Alphanumeric
9	Optional Numeric
a	Optional Alphabetic

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Improve the User's Experience

Appearance Elements improve the user experience for your data collectors by adding space between elements and additional prompts.

Appearance Elements

- Divider
- Image Label
- Label

Add the Reference ID ELEMENT_SKIP_REPORT to omit elements from HTML view & Emails

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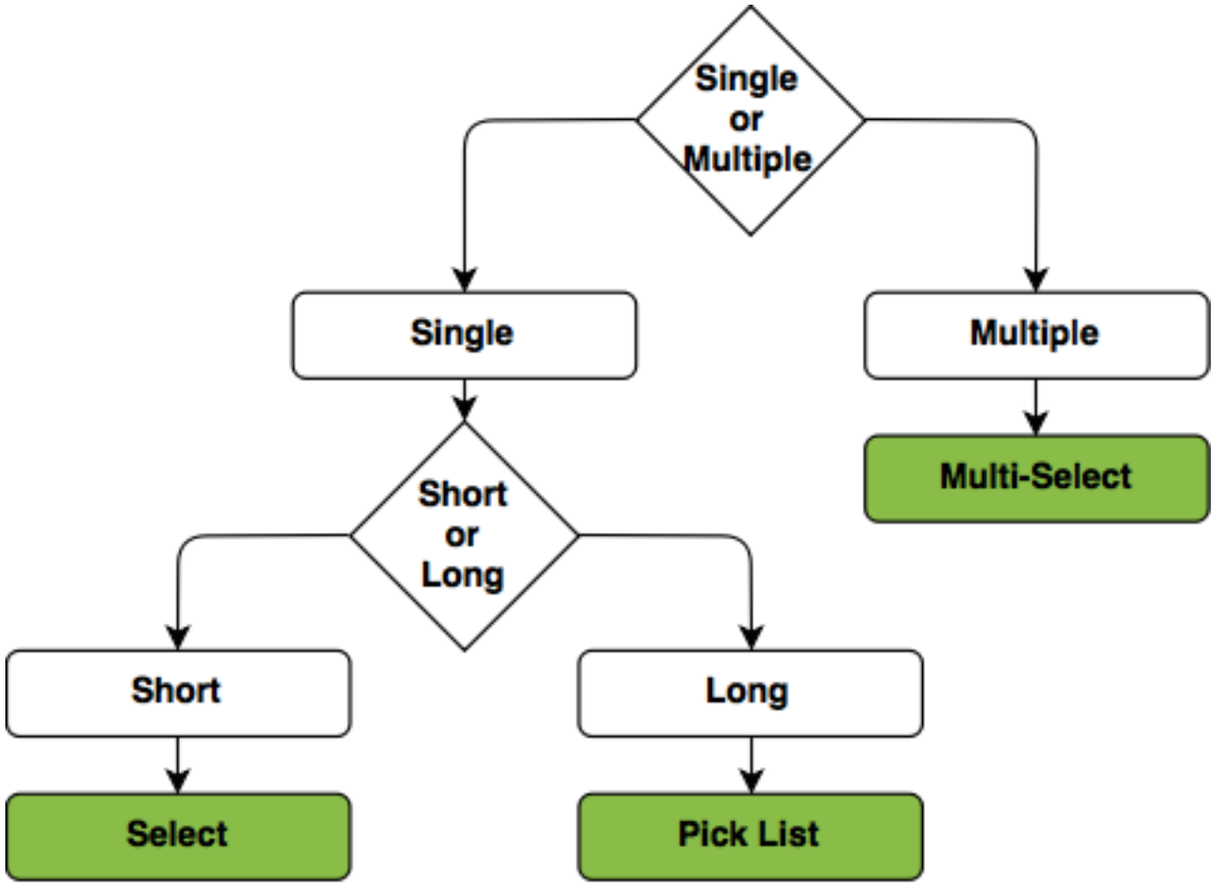
The Preferred Data Input

Option-based Elements greatly improve the integrity of your data collection. The user will select from a pre-defined 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

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Using Option Lists

Photo by Kaboompics on Pexels.com

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Three Key Properties of Option Lists

Label text is shown on the device -- clear and concise, can be localized

Key Values uniquely identify each option -- avoid special characters, may mirror Label text

Sort Order controls the arrangement of options -- starts with 0, useful for comparing a range of options

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Inline View vs. Option List Manager

Inline View: assign existing Option List or create a simple list -- don't forget to save!

Option List Manager: Create an Option List in one of three ways -- make use of CSV upload!

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Form Building Golden Rules

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Test Before Going Live

Test your form on all anticipated operating systems, device types, and environments

Gather feedback on usability, text clarity, and different data inputs

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Meaningful Data Column Names

The DCN is an element's identifier

Ensure DCNs are unique and database-friendly

Use short but descriptive naming conventions

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Avoid Data Loss While Updating

Changing the data type, data size, or encryption will lead to data loss

Update a form using the duplicate, adjust, disable technique

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