Form.com & Key Survey Version 8.56

The Form.com & Key Survey Mobile Application Guide consists of the following topics:

Devices Compatible with Mobile Application
The Form.com / Key Survey Mobile applications are capable of running on multiple mobile operating systems and preferred web browsers:

- iPhone, starting from iPhone 4S with iOS 9 and higher;
- iPad, starting from iPad 2 with iOS 9 and higher;
- Android phones and tablets with Android 5.1 and higher;

⚠️ Please note that some of the Android devices may be running a different operating system, for example, a Fire OS on Amazon Fire tablets. Such devices may not include the Google Play store, from which our apps are downloaded and installed. While it may be possible to make modifications to add the Google Play store to such devices, we do not support using our apps on Fire OS and cannot guarantee their stable performance.

Form.com Desktop application for Windows can run on Windows 7, Windows 8.1 Pro and Windows 10. Windows 8.1 RT is not a supported version.


Application Installation and Upgrade
The application can be downloaded to the device of your choice by using one of the links provided.
The Form.com Mobile application for Windows desktop
Auto-update feature is disabled
Note: This version will overwrite any version of an application installed earlier.

The Form.com Mobile is the legacy version of the mobile app for Android.
Users should use this app only if instructed to do so by their account administrators.
See this FAQ for more details.

The Key Survey Mobile application can be installed on the iPhone, iPad and iPod from the iTunes App Store.
The Key Survey Mobile application can be installed on Android devices from the Google Play Store.

Windows Desktop application can be installed using Remote Administration Tool, however, you need to use the application directly on the computer, where it is installed.

To start collecting data Offline, please follow these steps:
1. Create web forms for Offline data collection.
2. Create a Contact Manager with a list of Contacts, who should have access to the Portal.
4. Publish your Forms to the Participant Portal.
5. Download the Form.com/Key Survey Mobile application for offline data collection from your mobile device.

When your forms are ready for data collection, you need to go to the Mobile App, enter Portal ID, Login, and Password of the Portal User to log into the application and see the list of forms and tasks, published for this user. For more details please take a look at the Offline Application User Guide.

If you are using an outdated WorldAPP Offline application, and need to update to the latest version of the Form.com/Key Survey Mobile application, you will be required to undergo a small transition procedure.

1. Synchronize your data in WorldAPP Offline before installing the Form.com/Key Survey Mobile application.
2. Log into your account once the Form.com/Key Survey Mobile application is installed.
We strongly encourage the installation of Form.com/Key Survey Mobile since it provides all the latest features available to users of the platform.

- The WorldAPP Offline application will still be completely functional but not compatible with future improvements and functionality updates.
- Please synchronize your data before logging into the Form.com/Key Survey Mobile application instead of running the applications simultaneously since it may lead to data loss.

### Offline Compatible Form and Survey Setup

The Form.com/Key Survey Mobile application allows accessing and submitting Forms/Surveys offline. Before downloading the Forms/Surveys to the device, they should be created online with the use of the Form.com or Key Survey tool.

The Form/Survey administrator should:

1. **Login** to Form.com or Key Survey online application.
2. Press the **New** button from the Forms/Surveys home page.
3. Select **Survey** (enhanced for offline support) or **Linear Form** and proceed with the design.

Once the Form/Survey has been created, the system will indicate if it is compatible with the Form.com/Key Survey Mobile application. A green **Available** icon indicates that the Form/Survey can be accessed from the Form.com/Key Survey Mobile application. A red **Not available** icon notifies that the Form/Survey is not compatible with offline mode.

![Form.com/Key Survey Mobile screenshot](image)

In order for a Form/Survey to completely meet the mobile application requirements, certain limitations should be considered.
All the forms’ themes, available by going to Edit Form page -> Layout are mobile friendly and will resize automatically to fit the device screen. However, we do not recommend to use large scales or a lot of columns in the questions of your offline forms/surveys, as this may cause a scrollbar to appear at the bottom.

In you use hyperlinks in the offline forms which are accessed from Mobile or Desktop applications, please keep in mind that:

- Links without the target attribute e.g. `<a href="https://form.com"">Hyperlinked text</a>` will be opened in built-in browser.
- Links with the attribute target="_blank" e.g. `<a href="https://form.com/" target="_blank">Hyperlinked text</a>` will be opened in system browser.

Unfortunately, there are certain features which are not accessible from the Form.com/Key Survey Mobile application.

- Custom Forms from Trash folder (or forms deleted even after Trash)
- Surveys with any type of Logic
- 360 Surveys
- Common-password Surveys
- Show results to respondents
- Redirect Page

### Offline Plugin Compatibility

The following Plugins can be used in Forms/Surveys which will later be accessed offline from the Form.com/Key Survey Mobile application:

- Create contact or custom data object
- Update contact or custom data object
- Respondent ID Saver
- Score Calculator
- Logical Data Sender
- Workflow
- Responses Signature
- Interactive Logic
- Circular Progress Bar
- Slider
- Star Ratings
- Calendar
- Comment Box
- Drag and Drop Functionality
- Exclusive
- Mobile friendly controls
- Predictive Text Input
- Score Calculator Offline
- 3D Matrix Calculations
The application includes an indication of whether or not the Plugin is compatible with offline data collection. In case if Plugin is compatible with offline data collection, small picture of mobile phone with green plus sign will be shown close to "Insert" data. In other case, picture of mobile phone with red minus sign will be displayed. Example of compatible and non-compatible plugins showed on the image below.

**Portal User Access Setup**

The Form.com/Key Survey Mobile respondent database is based on the Contact Managers which have been created in a Form.com or Key Survey account.

A new Contact Manager can be created from the Contacts page by clicking the New button and selecting Contact Manager from the dropdown.

1. Select the preferred creation method.
   - The Create contact list by uploading file with data option allows creating and adding batches of contacts to the Contact Manager.
   - The Create list by manually editing fields option allows creating Contact Manager fields manually.

2. Create the necessary fields.
   - The Contact Manager must include the following mandatory fields:
     - Unique Key – which will be used to store the contact identifier, which must be unique to each participant.
     - Email Address – which will be used to store the participant's email address.
     - Login – which will be used to store the participant’s Username for access to the Online/Offline Portal as well as the WorldAPP Form.com/Key Survey Mobile application.
     - Password – which will be used to store the Password required for the participant to access the Online/Offline Portal as well as the WorldAPP Form.com/Key Survey Mobile application.

3. Select the field Format and indicate the field containing the Unique Key/Email.
   - Once you have added all of the necessary fields, specified the required format and assigned the mandatory fields - it would be best to indicate the Name Format.

4. To view required details in the Assigned to column of the Tasks page, indicate the corresponding fields in the Name Format pop-up.
The Name Format is used to specify the format of the assignee name which will be visible to the you in the Assigned to: column of the Tasks page.

Once the Contact manager fields have been specified and the Name Format set, press the Save button.

5. Complete the profile data for each user.

In order to create additional contacts you can either manually input the details one by one or take advantage of the Import functionality.

⚠️ If the required Contact Manager does not exist, it must be created by the Form/Survey owner or administrator.

Form or Survey Portal Access Setup

A Form/Survey can be published to the Portal form the Launch page when accessed from the Form.com/Key Survey user or administrator account.

1. Open the Launch section of your form or survey.
2. Indicate the Start and End Dates if required.

Once on the Launch page, you can also activate:

- The Send alert when the Form/Survey expires to receive an email reminder of the expiry date.

Edit the address and contents of the Email Alert which will be sent when the Form/Survey expires.


   To launch a desired Form/Survey (enhanced offline support) to the portal, go to the Launch page and select the Publish to the User Portal and Mobile App option.

   a. Select the required Contact Manager from the dropdown. You can use only one Contact Manager per form/survey. This means that if you have already published the form/survey to people from one Contact Manager, you cannot publish it to people from another Contact Manager list.

   b. Click the Change the group of contacts button to add or remove contacts by adding the filter, which will determine who will see the form/survey on the Participant Portal. For more details consult the Contact Groups help chapter.
a. By clicking Manage selected contacts, you may export the contacts to Excel or CSV and customize individual start and end date of the form for each participant.

b. Auto Republish when contacts selection changes - this option enables automatic publishing of forms to the new contacts that match selected criteria, as well as removing access to forms ("un-publishing") for the contacts that no longer match the group filters criteria (due to filter or contact changes).

If ‘Auto Republish when contacts selection changes’ option is not checked, and the contacts’ selection change manually after the form has been published to the Participant Portal, saving new Filters will republish the form to the new group of contacts. Any changes to the filters will not take effect until you click ‘Save Filters’/ ‘Save Filters and Republish’ button.

c. Click the Setup Data Flow button, apply field mappings and data flow direction, to prefill the form with the data stored in the contact manager or update selected contacts with the new information from the submitted response.

Example:
When respondents change their living address, job position, email and other personal details, you can update contact records with the up-to-date information. You can also prepopulate survey questions with the data from the Contact Manager. For more details consult the Data Flow chapter.

d. Specify the number of responses you wish to collect from each respondent per form. Allocate the response modification rights (Edit completed, Copy, Delete completed) for users of the portal, which are also applicable to the users of the Mobile application.

Please note, that if the portal user deletes his response on the Portal or Mobile App, it will also be removed from all form/survey reports upon synchronization.

e. Indicate the Participant Portal display conditions by selecting the same dates when the survey is active or set custom dates to modify the availability period.

f. Activate the send email notification to contacts when the form is published functionality if required.

g. Click the Publish to Portal and Mobile Apps button to publish the Form/Survey.

Once your survey is published to the Portal, the access to the form/survey via Master URL will be restricted to only those participants, who are logged on to the Portal.

Back button takes you back to the form/survey Launch page.
Portal Mobile Access Setup

The Portal settings can be modified on the Portal page when accessed from the Form.com/Key Survey user or administrator account.

A Participant Portal is created for each Contact Manager available within the account. At the top of the Portal page you can select the needed Contact Manager:

**Portal Settings**

<table>
<thead>
<tr>
<th>Area managers</th>
<th>Factory Inspections</th>
</tr>
</thead>
</table>

**Portal URL** allows to access Online portal through the web browser. **Portal ID** is a unique identifier of the Portal, which is required to log into the Mobile app.

Please note that starting from December 4th, we have removed the Portal Offline URL from the Portal page, as it is incompatible with some question types, such as File Upload, Object Lookup, Multiple Object Lookup. In case you would like to continue using the Offline URL, you can recreate it by following the next format:

```
Server URL/offline/#{Portal ID}
```

For example, https://app.form.com/offline/#1065188

However, if you need to collect data in the Offline mode, we recommend accessing the Offline Portal via Mobile or Desktop Offline application.

**Impersonate** functionality allows you to see the Portal from the side of particular respondent. To use this feature, click **View Impersonate** button, type in the respondent's unique ID stored in the Contact Manager and click **Ok**:

**Available tabs:**

On the **Portal Settings** page you can customize Portal behaviour and functions and apply design to the Portal layout in accordance with your corporate colors.

The **Portal Logo** option allows you to add a custom logo to the Portal. Select the image you would like to set as a logo by clicking the **Add portal logo** button. You can either select the image from the Media Library or upload a new one.
The **Portal colors** can be customized using the Colors pane. Once the Portal logo is selected or uploaded, the system may automatically match the colors to the logo:

![Portal logo](image)

It is still possible to select the Portal colors different from those matched by the system. Click "No, do not change" button and select necessary colors.

**Available tabs**

Portal administrators can change the names of **"Forms"** and **"Tasks" tabs** that appear in the mobile applications. The names' edit fields can be found on the Portal Settings page:

![Available tabs](image)

**Links to be displayed on Portal**

Logout link is displayed on the Portal page by default. You can edit its name by clicking **Pencil** button next to Logout line. You can also embed links to internal or external web pages or documents by clicking on the **New link**:

![Links to be displayed on the portal](image)

**Portal languages**

Form/survey administrators have control over the languages that mobile application users can select by adding them on the Participant portal settings page. Administrators will also be allowed to translate custom labels they have provided for the "Forms" and "Tasks" tabs, and custom links they have added to be displayed on the portal:

![Portal languages](image)

Please, see the complete list of supported languages below:
For details on how to use Multilingual Forms Offline, please refer to this help chapter.

Keep uploaded forms and tasks on device
This feature allows controlling whether Completed and Uploaded responses and tasks should stay on the device after upload or not. Responses or tasks may be removed from the device either immediately after uploading to the server or after a specified number of days. If you choose the option 'Always' they will stay on the device.

Security Options feature works in combination with the Delete after Upload/Delete after N days setting. It will prevent portal users from accessing Completed Responses and Tasks after they have been uploaded. This feature does not affect In Progress and Completed (Not Uploaded) responses.

<table>
<thead>
<tr>
<th>Keep uploaded forms and tasks on device:</th>
</tr>
</thead>
<tbody>
<tr>
<td>In progress forms, as well as open tasks, will always remain on the device. Pinned forms and tasks will remain on the device only if the allow users access to Completed Responses option is selected. If it is not selected, Pinned forms and tasks will not be accessible from the device once they have been Completed/Closed and Uploaded.</td>
</tr>
</tbody>
</table>

Security Options:
Use this setting to allow or deny users' access to accessing completed responses and tasks (online portal), and completed uploaded responses and tasks (offline portal).

- Allow Users Access to Completed Responses
- Deny Users Access to Completed Responses

There are two Security Options available:

- **Allow Users Access to Completed Responses** - this setting in combination with 'Delete after Upload/Delete after N days' option works for the Offline App only and removes data from the device to save space, but does not delete response headers. Therefore, when the internet is available, the Portal user can still click on the header of the completed response and download it.
- **Deny Users Access to Completed Responses** - this setting in combination with 'Delete after Upload/Delete after N days' option applies to both Online Portal and Offline App, and does not allow the portal user to access completed and uploaded responses and tasks, as their headers are also removed from the portal.
• Security Options applies to the whole portal, not to individual forms/tasks and does not impact Task Management
• ‘Always’ option in Keep uploaded forms and tasks on device section is compatible only with Allow Users Access to Completed Responses security option
• As the Portal administrator, you are able to change the setting from Allow Users Access to Completed Responses to Deny Users Access to Completed Responses and vice versa when needed. Once the Security option is changed, Online portal users will immediately see the change reflected on their portal. Offline users will need to synchronize their portal for this change to take effect.
• Pinned forms and tasks will NOT be accessible once Completed/Closed and Uploaded, unless ‘Allow Users Access to Completed Responses and Closed Tasks’ option is selected
• For Responses, X days are counted from the day when response was created (on server); for Tasks, X days are counted from the day the task was Closed
• For Tasks, it does not matter whether the form linked to the Task has been Completed. You will be able to access the form until that Task is Closed

Allow to Pin responses and tasks
Once a response or a task is pinned, its data with attachments will never be removed from the mobile device. The pinned response will be placed at the top of the list and all pinned responses will be sorted by submit date.

Authentication types
Portal page is personal per each participant and should be secured. Therefore when creating Contact manager, two of its fields should be set as Login and Password for accessing the Participant portal (for instance email address, users’ names or personal ID). Contact manager fields that are used as Login and Password for the particular portal are listed under the Authentication type pane:

Require password change at first login for all new users If this option is checked, all new users added to the Contact manager after you configure the portal settings will be asked to change their passwords on their first login. If you need to apply it to existing Contact manager users, please use ‘Require password change for all existing users’ option.

Require password change for all existing users If this option is checked, all existing contacts will be asked to change their password upon logging into the portal for the first time or their next login.

Portal is available
Set up Portal activation date and time so the Portal is opened for respondents for a set period of time or make it accessible all the time by selecting the Always option.

Automatically download file attachments to Mobile app
For In progress responses and "Open" tasks you may specify whether the attached files should be downloaded back to the mobile device or not:

Automatically download image attachments to mobile app:
- Enabled
- Disabled
**Autosave responses in Mobile app**
New changes on the Portal will be periodically **autosaved** (every 5 seconds) if this feature is enabled.

You may turn it on for the whole Portal on this page or let the Portal user decide whether new data should be automatically saved on the background. A Portal user may enable this feature by going to **Settings in Mobile app**, or while filling out a form. By default, this option is disabled on the Portal Settings page.

**Filter Data Models for specific Contacts**

Data Model filtering allows to limit the Data Model records that will be presented in the Object Lookup questions depending on the Contact properties. This feature is quite useful if you collect data in the offline mode. Data Model filters will reduce the amount of data that needs to be downloaded to the device during synchronization. As a result, the sync time may also decrease.

At the bottom of the Portal Settings page, you will see a list of Data Models currently used in Forms and Tasks which are published to the Portal:

You can also see the size of the Data Model, as filters will be useful for large Data Models in particular.

To filter Data Model records for a specific contact group, click the **Add Filters** button. You will be directed to the **Data Model Filters** page, where you will be able to select the contact group and set up filters for it.

**Participant Mobile Access Instructions**

Run the Form.com/Key Survey Mobile application on your device and indicate the login credentials.

The login details should be provided to participants by a Form/Survey owner. Once logged in, the users are able to download accessible Forms and Surveys, submit responses, upload collected data to the server and carry out tasks assigned to the user. To log in next set of actions should be executed:
Type in the **Server link** which you are attempting to access (app.keysurvey.com, app.form.com or other link to access a custom solution).

Specify the **Portal ID**.

Indicate the **Login**.

Enter the **Password**.

In case you forgot your password, click on the **Forgot your password?** link.

In order to receive a temporary password you will be required to input:

- The **Server link** which you are attempting to access.
- The **Portal ID** of the Portal you wish to access.
- The **Username** which is associated with the password you wish to reset.

**Participant Mobile Application Functionality**

The user interface of the **Form.com/Key Survey Mobile** application includes the following features:

1. **The Menu button**.

   The **Menu button** indicates the number of **responses** as well as **task modifications** which are currently stored on the device and have not yet been uploaded to the server.
The **Menu** provides the following options:

- The **Synchronize** option to update Forms and Tasks on your device and upload collected data to the server.
- The **Download** option only downloads any new and updates existing Forms/Surveys if any changes were applied by the Form/Survey owner.
- The **Upload** option indicates the number of collected responses and sends collected data to the server when pressed.
- The **Settings** option brings you to the details of the application version. Here you can see the last upload date and time and you can activate the automatic data upload to the server.

```
<table>
<thead>
<tr>
<th>Settings</th>
<th>Language: English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload data when online</td>
<td>Off</td>
</tr>
<tr>
<td>Force Full Sync</td>
<td>Off</td>
</tr>
<tr>
<td>Last Upload</td>
<td>2018-06-07 9:11:59 AM</td>
</tr>
<tr>
<td>Last Download</td>
<td>2018-06-07 9:11:59 AM</td>
</tr>
<tr>
<td>App Version</td>
<td>8.27.971</td>
</tr>
</tbody>
</table>
```

- Switch the **Upload data when online** *On* and the application will upload collected data to the server automatically when your device connects to the internet.
  
  Automatic data upload takes place when users launch the application on a mobile device and then updates every five minutes. If a user has saved changes to responses and an internet connection is available, the changes will be uploaded before the five minutes period expires. The application should be active, i.e. on the screen, in order for the automatic upload to work. If the user leaves the application or launches some other application, the next automatic upload will work immediately after the user returns to the **Form.com/Key Survey Mobile** application. Last upload information will not be updated on the screen during auto upload. The user should navigate to another screen and then return to see that information regarding the uploaded data. The Forms/Surveys owner can see the data right after it has been uploaded.

- **Force Full Sync** option can trigger manual **Full Synchronization** of the Mobile App. Since the release of version 8.18 of our application, the Mobile App uses **Incremental Sync**, which significantly improves the sync speed by downloading only new or changed forms, tasks and data models from the server instead of always downloading all data for the user. Full synchronization is also performed after application or server updates.
- **Language** if a Portal is set up as Multilingual, a portal user may switch the language on the Portal Settings page. There are two options: **Change and Run synchronization** will trigger mobile app sync and change both Portal interface and Multilingual Form's language. **Change without synchronization** will change only Portal interface language.
- **Autosave Responses** If this feature is enabled, new changes on the Portal will be autosaved every five seconds. Also, Autosave can be enabled when filling out offline forms.

- The **Logout** option allows the user to properly exit the **Form.com/Key Survey Mobile** application.
2. The **Forms** tab.

Available forms and surveys are listed on the left side of the screen. Tap on a Form/Survey name to select it. Once you collect responses to the selected Form/Survey the collected responses will be visible on the right side of the screen.

Information available about a response:

![Forms tab](image)

- **New Response** - the date and time inform users of when the response was created.
- **Date and time under the New Response** - informs of the date and time when the response was last modified.
- **In Progress status** - means that the **Submit** button was not pressed to complete the response. A user can save partial responses by clicking **Save** and/or **Next** button on the Form/Survey.
  - The **Completed** status means that the response was submitted.
  - The **Uploaded** status informs that the response was uploaded to the server.
  - The **Changed after sync** status informs the users that the response was modified on a device after the original response was uploaded to the server.
- **Pinned response** - Once a response is pinned, its data with attachments will not be removed from the mobile device. The pinned response will be placed at the top of the list and all pinned responses will be sorted by submit date. All of them marked with a pin mark next to the status.

A response can be copied by tapping the **Copy** button which is located on the right of a stored response.

Moreover, the response can be modified by tapping on the desired one.

![Forms tab](image)

Following options will become available once a response has been selected:

- **View** - Opens the response for a view.
- **Copy** - Copies the submitted response.
- **Delete Permanently** - Deletes the response from the device.
- **Pin** - Allows to pin responses.
- **Upload** - Uploads the collected response data to the server from the device in use.

3. The **Tasks** tab.

The **Tasks** tab contains the following functionality:

1. **My Tasks** tab.

   The **My Tasks** tab provides the following features:
• Viewing and modifying the Task by clicking on the **Name** of the associated Task.

The following options will become available once a Task has been selected:

• **View form** - allows reviewing filled form if it is attached to a task.
• **Reassign** - allows reassigning the Task to another assignee.
• **Change status** - allows changing the Status of the Task.
• **Change Due Date** - allows changing the Due Date of the selected Task.
• **Pin** - allows pinning a task. Once the task is pinned, its data will never be removed from a mobile device.
• **Upload** - uploads the modified task details to the server.

• Changing the Task Status by tapping the **Change Status** button located to the right of the associated Task.
• Selecting and modifying multiple tasks by tapping on the **Checkbox** on the left of the associated Tasks.
The following options will become available once required multiple Tasks have been selected:

- **Reassign** - allows selecting a contact to reassign multiple Tasks.
- **Change Due Date** - allows specifying a due date for multiple Tasks.
- **Change Status** - allows changing the status of multiple Tasks.

The Task modification option availability is subject to change once the corresponding Responsible Party Permissions are allocated to the user.

2. **Task Management** tab.

The Task Management tab provides the following features:

- Viewing and modifying the Task by clicking on the Name of the associated Task. Multiple Tasks can be modified by pressing on the checkboxes on the left of the name.

The following options will become available once a Task/Tasks have been selected:

- **Reassign** - allows reassigning the Task to another assignee.
- **Change Due Date** - allows changing the Due Date of the selected Task.
- Selecting and modifying multiple tasks by tapping on the Checkbox on the left of the associated Tasks.
The following options will become available once required multiple Tasks have been selected:

- **Reassign** - allows selecting a contact to reassign multiple Tasks.
- **Change Due Date** - allows specifying a due date for multiple Tasks.

3. **Table/List view.**

   Allows sorting the Tasks by clicking the column headers when the Table view is activated.

4. **Show Filters** button.
The Filter functionality allows to view the Tasks that only fit the following selected criteria:

- **Hide Closed & Uploaded** - removes the Closed & Uploaded Tasks from the list when activated.
- **Status** - displays only the Tasks which match the specified Status.
- **Assigned to** - displays only the Tasks which match the specified assignee.
- **Due date is after** and **Due date is before** - displays only the Tasks which match the specified Due date time frame.

The **Assigned to** feature is only applicable to the **Task Management** tab.
An Export feature will be available to the users which have accessed their Portal via the Desktop or Browser. It will allow the user to export the tasks which satisfy the current filter or search condition.

The Export feature is located to the left of the Table/List button.

The file will contain the following structure:

a. The first row should contain the labels for each column.
b. Each row in the exported file represents a task.
c. The file contains the following columns:
   - Summary.
   - Description.
   - Status - a text value of the task's current status.
   - Responsible Party - the name of the person to whom the tasks is currently assigned to.

The Name Format will be exported in accordance with the Name Format selected on the Edit Fields page of the associated Contact Manager.

- Due date - the assigned due date of a task.

The column will only be present if the task definition has an assigned due date.

- Custom properties - the values of a custom property. The custom properties will be exported in the order they are placed on the Task Management page.

The label for the column will be the name of the custom property.

- Only the properties that are configured to be visible in the Task Management tab can be exported from the portal.
- All custom properties can be exported from the admin page.
- Response link - a link to a Report by Respondent in the administrator mode.

- The column is only displayed for tasks which have forms attached to them.
- The Report by Respondent will include all hidden questions.

The Export feature is only available to users with Task Management permissions and administrators.

4. The Search field.

The Search field can be used to search by response labels on the Forms tab and by tasks labels on the Tasks tab.

5. The Add New button.

The Add New button opens the selected Form/Survey for response submission.

- The Username and Password should be specified in the Contact Manager for each participant by the forms/surveys owner.
- Also, the Contact Manager fields that contain the username and password should be selected on the Participant Portal settings page.
- The forms owner can find the six-digit Portal ID on the Portal Settings page under the selected Contact manager in the online application account or at the end of the Portal URL.