

Portal Mobile Access Setup (Archived)

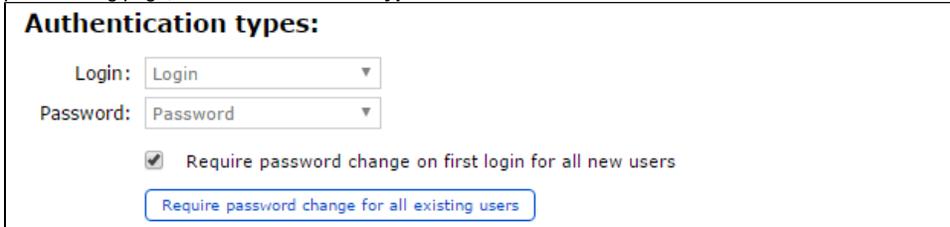
Important note

This article is archived. Please read a [new version of the article](#) about the User Portal.

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

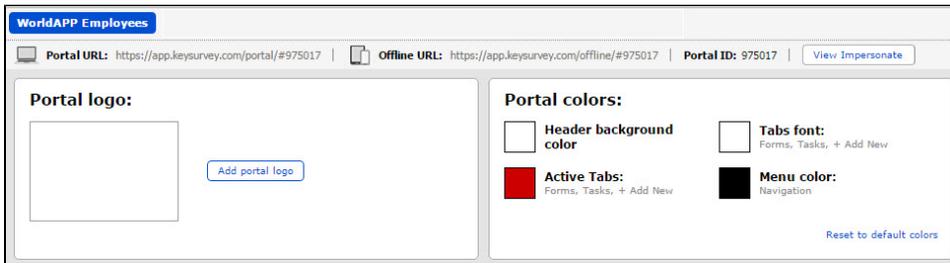
The Portal can be customized with the following steps:

1. When creating Contact Manager define the fields to be used for the Portal users authentication. These fields will be displayed on the Participant portal setting page, in the **Authentication types** section:

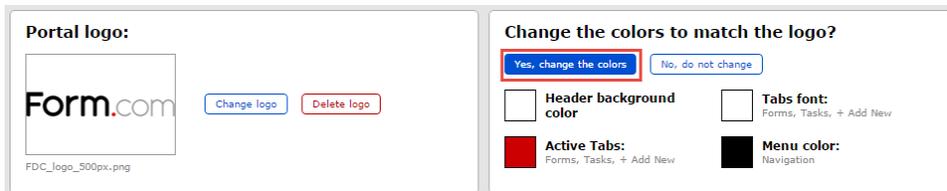


In order to require a new password to be created for all existing or new respondents at the time of their first login activate the corresponding feature.

2. Customize the **Portal** look based on your requirements.



- a. Click the **Add portal logo** button to upload your Portal logo or select necessary file from media library.
- b. Click **Yes, change the colors** button to adjust the color scheme automatically. Do not change the colors if you would like to select portal colors manually.



3. Change the names of **"Forms"** and **"Tasks"** tabs that appear in the mobile applications if necessary.



4. Create additional links which will be displayed under the menu dropdown:



5. If you would like to translate a portal/mobile application interface into multiple languages, create a language column or select existing one.
6. Limit the data stored in the mobile app to a set time period. Response may be deleted from the device either immediately upon upload to the server or after specified number of days after upload, or stay on the device forever.



7. Allow or restrict portal users to pin responses and tasks. Once a response 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.

Allow to Pin responses and tasks:
Pin important responses and tasks, so you can access them anytime from your device.

Yes
 No

8. Indicate the time period you wish for the Portal to be accessible to the respondents.

Portal is available:

Always
 For a set period of time

Activate portal: 

Deactivate portal: 

9. For **In progress** responses and **"Open"** tasks specify whether attached files should be downloaded back to the mobile device or not.

Automatically download file attachments to mobile app:

Enabled
 Disabled

To login to the **Form.com/Key Survey Mobile** application, the participants must be provided with the **Portal ID**, as well as their **Login** and **Password**.