

Participant Mobile Application Functionality (Archived)

Important note

This article is archived. Please read a [new version of the articles](#) about [Form.com iOS](#) / [Android](#) Mobile Applications.

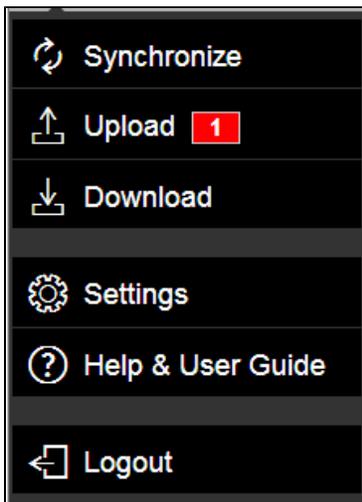
The user interface of the **Form.com/Key Survey Mobile** application includes the following features:



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.

Settings	
 Upload data when online <input type="checkbox"/> off	Language: <input type="text" value="English"/>
 Force Full Sync <input type="checkbox"/> off	Autosave Responses: <input type="text" value="Enable"/>
	Last Upload: 2018-06-07 9:11:59 AM
	Last Download: 2018-06-07 9:11:59 AM
	App Version: 8.27.971

- 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 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:



- **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.

+ Add New	Form Name: Inspection for restaurants
Massachusetts, Boston, Arbo... 2016-04-18 14:04 - Completed, Not Uploaded (New)	Label: Massachusetts, Boston, Arborway, 123
	Status: Completed
	Created: 2016-04-18 14:04
	Last Saved: 2016-04-18 14:04
	Uploaded: No
	Data On Device: Yes
	View Copy Delete Permanently Pin Upload

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:

Form.com Search

Forms **Tasks**

Inspections Task
3 open tasks

My Tasks Task Management

- Initial inspection**
Open, Uploaded
- Monthly inspection**
Open, Uploaded
- Daily inspection**
Open, Uploaded

Show Filters

- 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:

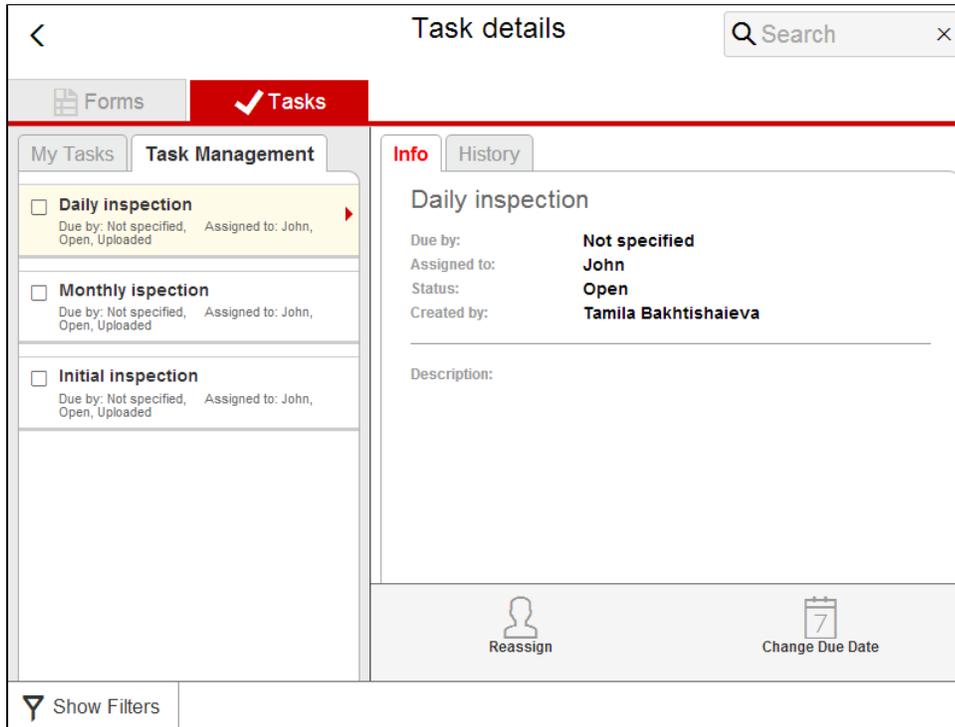
- **Reassign** - allows selecting a contact to reassign multiple Tasks.
- **Change Due Date** - allows specifying a due date for multiple Tasks.
- **Change Status** - allows changing the status of multiple Tasks.

The **Task** modification option **availability** is subject to change once the corresponding [Responsible Party Permissions](#) are allocated to the user.

2. Task Management tab.

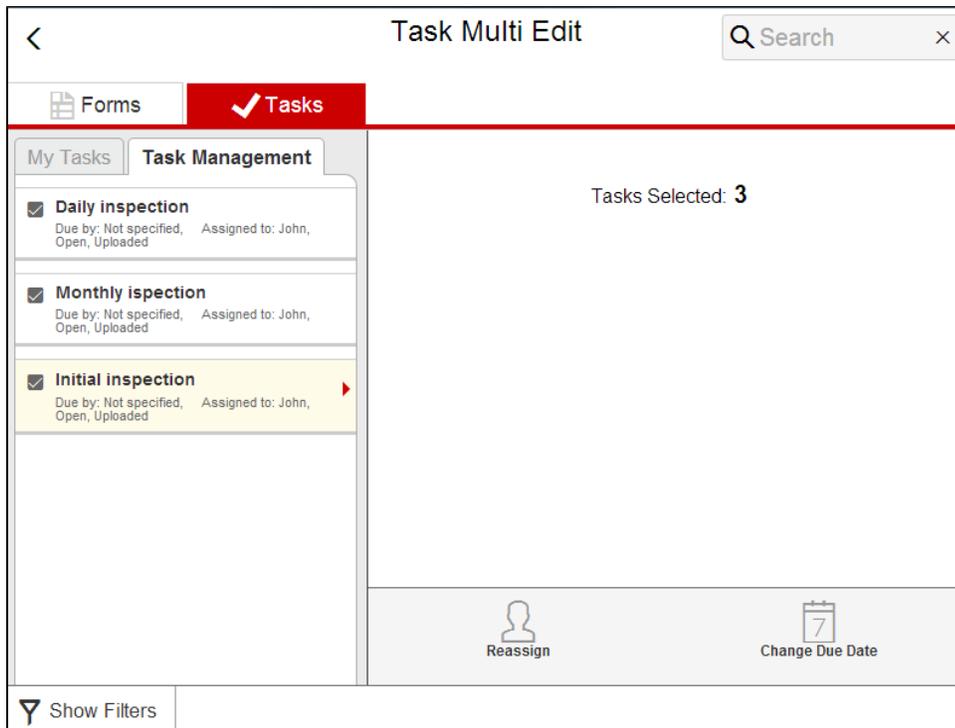
The **Task Management** tab provides the following features:

- 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.

The **Task Management** tab becomes **available** once the corresponding [Task Manager Permissions](#) are allocated to the user.

3. **Table/List** view.

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

Form.com

Forms Tasks

Inspections Task
3 open tasks

My Tasks Task Management

<input type="checkbox"/>	Summary	Due Date	Assigned to:	Status	Changes
<input type="checkbox"/>	Daily inspection	Not specified	John	Open	Uploaded
<input type="checkbox"/>	Monthly inspection	Not specified	John	Open	Uploaded
<input type="checkbox"/>	Initial inspection	Not specified	John	Open	Uploaded

Show Filters

4. Show Filters button.

Apply Filters

Done Clear All

Hide Closed & Uploaded

Status:
Select option

Assigned to:
Select option

Due date is after: Due date is before:

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/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.