

Form.com & Key Survey Version 8.82 (Archived)

Important note

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

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

Devices Compatible with Mobile Application

The **Form.com** applications are capable of running on multiple mobile operating systems and preferred web browsers:

- iPhone, starting from iPhone 6S with **iOS 13 and higher**;
- iPad, starting from any iPad (2018 model and higher) with **iOS 13 and higher**;

The **Web version of the Mobile app** is available by the following [link](#) for Google Chrome and Safari browsers.

Application Installation and Upgrade

The application can be downloaded to the device of your choice by using one of the links provided:

	 iOS	 Android	 Windows
	 <p>Form.com Mobile is the latest version of the app for Apple devices. We strongly encourage all users to use this version of the app.</p> <p>See this FAQ for more details.</p> <p>DOWNLOAD</p>	 <p>Form.com is the latest version of the app available for Android. Recommended for most users.</p> <p>See this FAQ for more details.</p> <p>DOWNLOAD</p>	<p>Form.com for Windows Desktop</p> <p>Our brand new Form.com application for Windows</p> <p>DOWNLOAD</p> <p>This version substitutes the Classic Form.com for Windows Desktop app and most likely this is the version you are searching for.</p>
	 <p>Form.com Classic is the legacy version of the app. You may continue using this version, but please consider migrating to the new version as the support for this version ends in December 2020.</p>	 <p>Form.com Classic for Windows Desktop</p> <p>Classic Windows desktop application that is being substituted by the newer one.</p> <p>DOWNLOAD</p>	

	<p>See this FAQ for more details.</p> <p style="text-align: center;">DOWNLOAD</p>	<p>Form.com Classic is the legacy version of our Android app. Users should use this app only if instructed to do so by their account administrators.</p> <p>See this FAQ for more details.</p> <p style="text-align: center;">DOWNLOAD</p>	<p style="text-align: center;">Form.com Mobile</p> <p>Classic Windows desktop application</p> <p style="text-align: center;">without the auto-update</p> <p style="text-align: center;">DOWNLOAD</p> <p>Note: This version will overwrite any version of an application installed earlier.</p>
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The Windows desktop application can be installed using the remote administration tool; however, you must use the application on the computer where it is installed.

To start collecting data with the mobile apps, 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.
3. Adjust **Portal Settings** on the **Portal** tab.
4. **Publish** your Forms to the Participant Portal.
5. **Download** the **Form.com** 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](#).

Offline Compatible Form and Survey Setup

The **Form.com** application allows accessing and submitting Forms offline. Before downloading the forms to the device, they should be created online with the use of the Form.com tool.

Once a form has been created, the system will indicate if it is compatible with the **Form.com** application on the right Information Panel.

An **Available** icon indicates that the form can be accessed from the Form.com Mobile application.

Form Jul 21 2022 5:30:12 AM

Form ID: 41628922



Theme: Default

Offline Available

Completed: 0

In Progress: 0

Not Started: 0

Response Rate: 0%

A **Not available** icon notifies that the form is not compatible with offline mode.

Form 2

Form ID: 41628857



Theme: Default

Offline  Not available

Completed: 0

In Progress: 0

Not Started: 1

Response Rate: 0%

- [How to start collecting data with the mobile apps](#)
- [Application Requirements for Forms](#)
 - [Hyperlinks](#)
- [Not accessible features from the Form.com Mobile Application](#)

How to start collecting data with the mobile apps

- **Create** web forms for Offline data collection.
- **Create a Contact Manager** with a list of Contacts, who should have access to the Portal.
- Adjust **Portal Settings** on the **Portal** tab.
- **Publish** your Forms to the Participant Portal.
- **Download** the [Form.com](#) 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](#).

Application Requirements for Forms

In order for the form 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.

Hyperlinks

If 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. `Hyperlinked text` will be opened in **built-in** browser.
- Links **with the attribute target="_blank"** e.g. `Hyperlinked text` will be opened in **system** browser.

Not accessible features from the [Form.com](#) Mobile Application

There are certain features which are not accessible from the Form.com 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 which will later be accessed offline from the **Form.com** application:

Plugins marked with * become functional once the results are **uploaded** to the server.

- 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

In case a plugin is compatible/not compatible with offline data collection, the system displays the following next to the **Insert** button on the Plugins page:



1. Offline available;
2. Offline not available;
3. Offline available not in real time.

Portal User Access Setup

Important note

This article is archived. Please read a [new version of the article](#) about the Contact Manager Creation.

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 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 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

Field Name:	Format:		Select Special Fields:
Name	General	↑ ↓ ×	Unique Key* ID
Email	Email address	↑ ↓ ×	Email
ID	General	↑ ↓ ×	Login
Login	General	↑ ↓ ×	Password
Password	General	↑ ↓ ×	Language

ADD NEW COLUMN

Name Formula
[Name] Change

Name Format:

It will not be possible to change the **Unique Key** field once contacts are created in the **Contact Manager**.

- To view required details in the **Assigned to** column of the **Tasks** page, indicate the corresponding fields in the **Name Format** pop-up.

Edit Filter

Objects columns	Selected columns
System Name	Email
First Name	
Last Name	
Department	
Login	

Add >> << Remove

Type text between tags (optional)
[Email]

OK Cancel

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.

- Complete the profile data for each user.

+ Add Contact

Edit Profile Fields

Settings

Import

Export

Plugins

[Show response statistics for contacts](#)

Search Contacts... All Go

▣ Edit History System Name ▶ First Name ▶ Last Name ▶ Department ▶ Email ▶

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

Important note

This article is archived. Please read a **new version of the articles** about the [Launch page](#) and the [Ad-hoc \(via Portal/Mobile Apps\)](#) distribution method.

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.

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

Form availability settings

Set Start and End Dates (optional)

Start date: 2018-03-29 8 AM EST

End date: 2018-04-29 12 AM EST

Send alert when the Form expires Edit Email

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**.

If you wish to choose different dates when the Form should be visible on the Portal, you can indicate this on the **Publish on Participant Portal** page:

5 **Form should be visible on Portal between the following dates:**

Same as form start and end date

Different dates

Show on Portal page: 2018-03-29 7 AM EST

Hide on Portal page: 2018-04-29 12 AM EST

3. Select the **Publish to the User Portal and Mobile App** distribution method.

Select Form distribution method

3

- Publish to the User Portal and Mobile App
- Send email invitation with individual Form links
- Use passwords to identify users accessing the Form
- Embed the Form into your website, blog or application
- Distribute via Salesforce.com
- Upload responses

4. **Publish** on Participant Portal.

Forms can be published to the **User Portal**. This launch method is commonly used if you want your respondents to access all the forms published to them in one place.

To launch a desired Form (enhanced offline support) to the portal:

- Go to the Launch page and select the **Ad-hoc (via Portal/Mobile Apps)** option.

Select Form distribution method



Ad-hoc (via Portal/Mobile Apps)

Make this Form available on the Mobile App / Portal for ad-hoc submission



Task

Make this form a part of a task-based workflow

S

On the Launch page you can also indicate the **Start** and **End Dates** of a form availability if required.

Form availability settings

Set Start and End Dates (optional)

Set response limit (optional)

Start date EST

End date EST

Send alert when the Form expires [Edit Email](#)

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

1 Select Contact Manager:

[Change the Group of Contacts](#)

Currently **3 contacts** are selected

Auto Republish when contacts selection changes

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 on the User Portal. For more details consult the [Contact Groups](#) help chapter.

By clicking the hyperlinked amount of contacts, you can export the contacts to Excel or CSV and customize individual start and end date of the form for each participant

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 the **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.

- 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.

2

Data flow

[Setup](#)

Form Items

-Search-

- [Q1] Please select the most suitable option for you.
 - [Q1.A1] Daily
 - [Q1.A2] Weekly
 - [Q1.A3] Monthly
- [Q2] Do you like it?
- [Q3] ID
 - [Q3.A1]
- [Q4] Name
 - [Q4.A1]
- [Q5] Your data
 - [Q5.A1] City
 - [Q5.A2] Address

Overwrite with empty values

Contact Manager Fields

-Search-

- Name
- Email
- ID
- Login
- Language

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.

- 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.

3 Permissions

- Allow only one response per form
- Allow multiple responses per form

With existing responses allow to:

- Edit completed
- Copy
- Delete completed

If the portal user deletes his response on the Portal or Mobile App, it will also be removed from all form reports upon synchronization.

- Indicate the **Form should be visible on Portal between the following dates** setting by selecting the same dates as form start and end date.

If you wish to choose different dates when the form should be visible on the Portal use the **Different dates** option.

4 Form should be visible on Portal between the following dates:

- Same as form start and end date
- Different dates

Show on Portal page EST

Hide on Portal page EST

An **expired form will not be visible** on the Portal even if you allow a form to be visible on the portal using the Different Dates option.

- Activate the [send email notification to contacts when the form is published](#) functionality if required.

5

Send email notification to contacts when the form is published

From: anna.indychenko@form.com

Subject: Publish on Portal notification: Laundry tech USE IT !

Body: NOTE: This is placeholder text. You must delete this text and

- Click the **Publish to Portal and Mobile Apps** button to publish the form.

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

Portal Mobile Access Setup

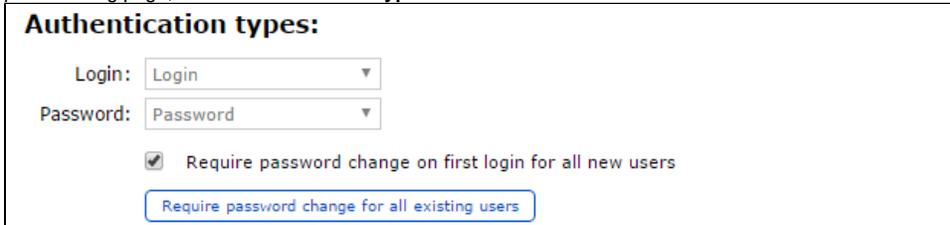
Important note

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.

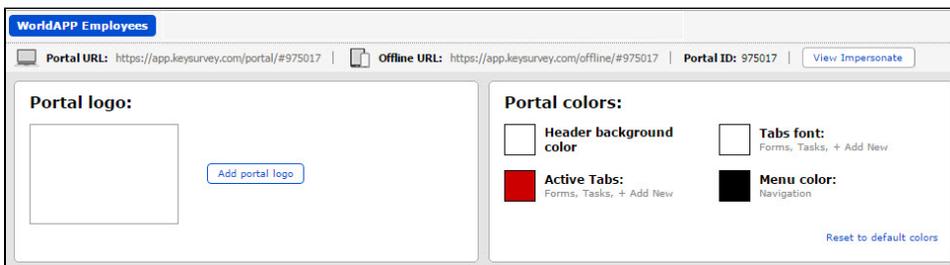
The Portal can be customized with the following steps:

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.



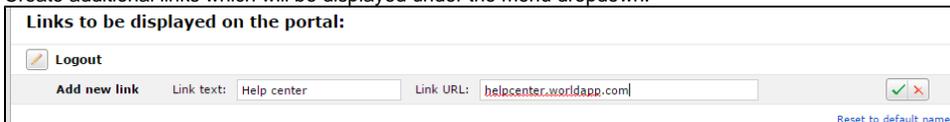
- a. Click the **Add portal logo** button to upload your Portal logo or select necessary file from media library.
- b. Click **Yes, change the colors** button to adjust the color scheme automatically. Do not change the colors if you would like to select portal colors manually.



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.

Keep uploaded forms and tasks on device:
Pinned, In progress as well as Open tasks will always remain on the device.

Always
 Delete after upload
 Delete after days

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**.

Participant Mobile Access Instructions

Important note

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

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

Important note

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

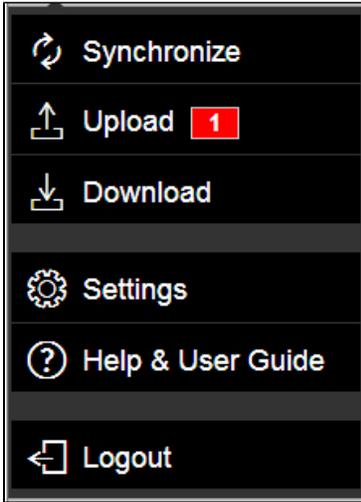
The user interface of the **Form.com/Key Survey Mobile** application includes the following features:



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.

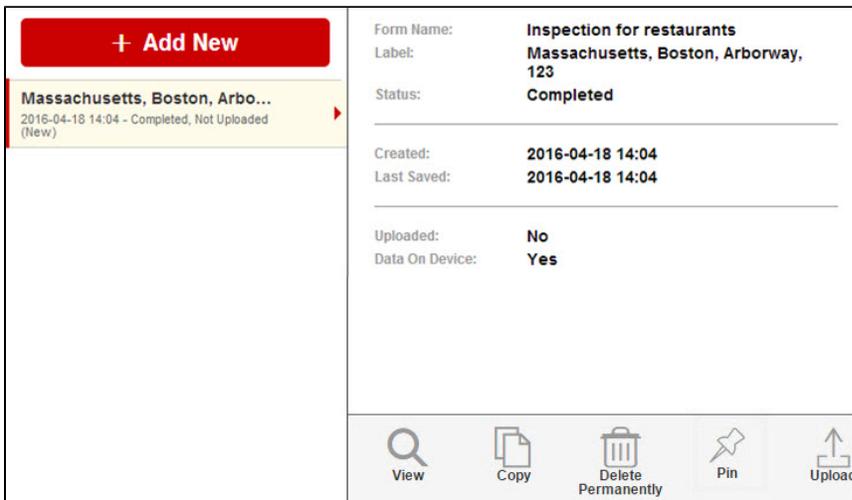
Information available about a response:



- **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.



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

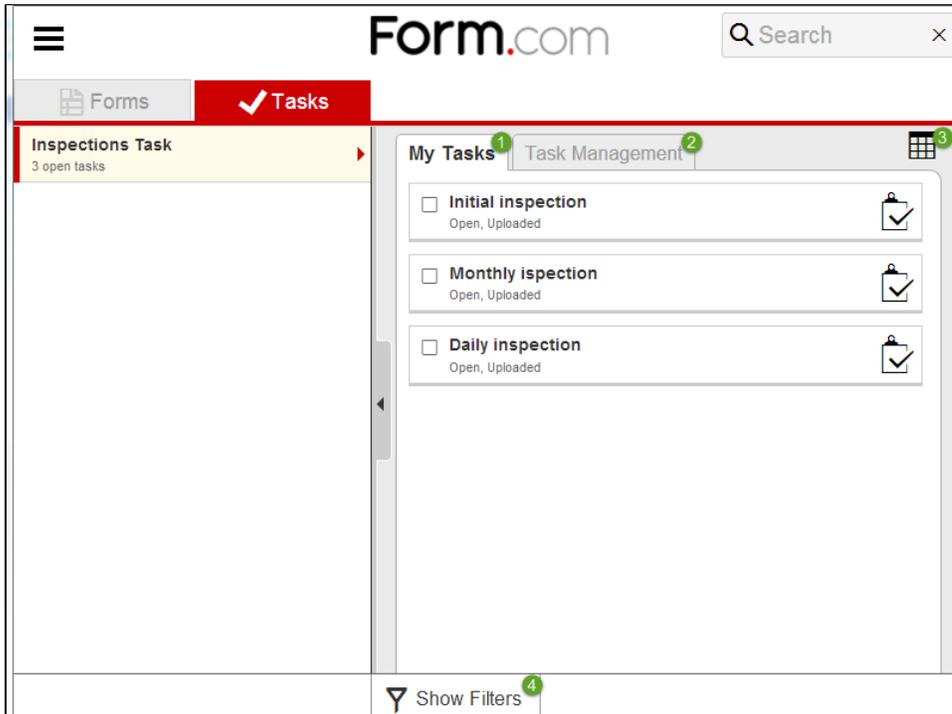
- **View** - Opens the response for a view.
- **Copy** - Copies the submitted response.
- **Delete Permanently** - Deletes the response from the device.
- **Pin** - Allows to pin responses.
- **Upload** - Uploads the collected response data to the server from the device in use.

3. The **Tasks** tab.

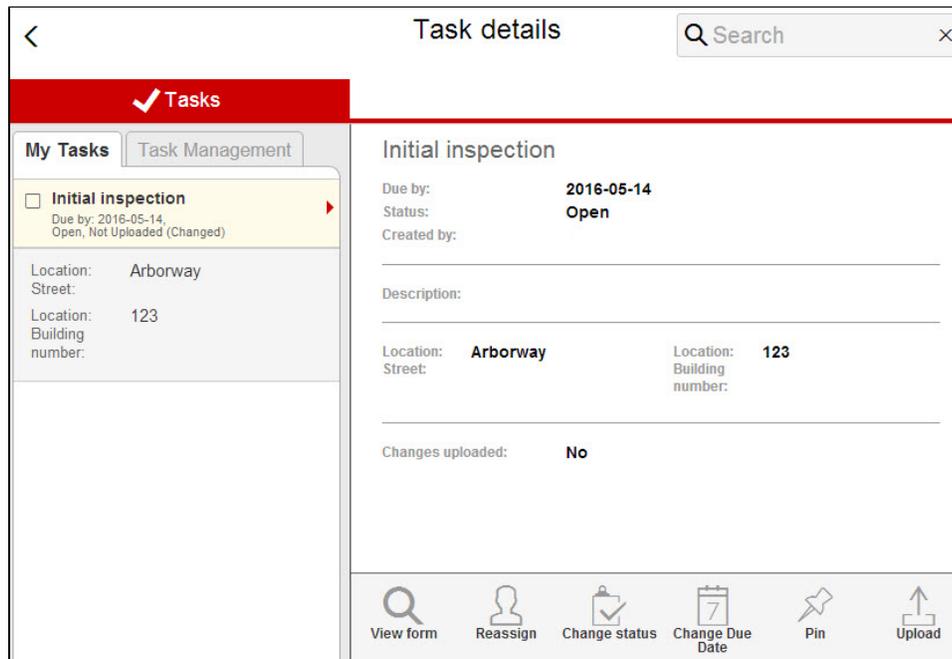
The **Tasks** tab contains the following functionality:

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.

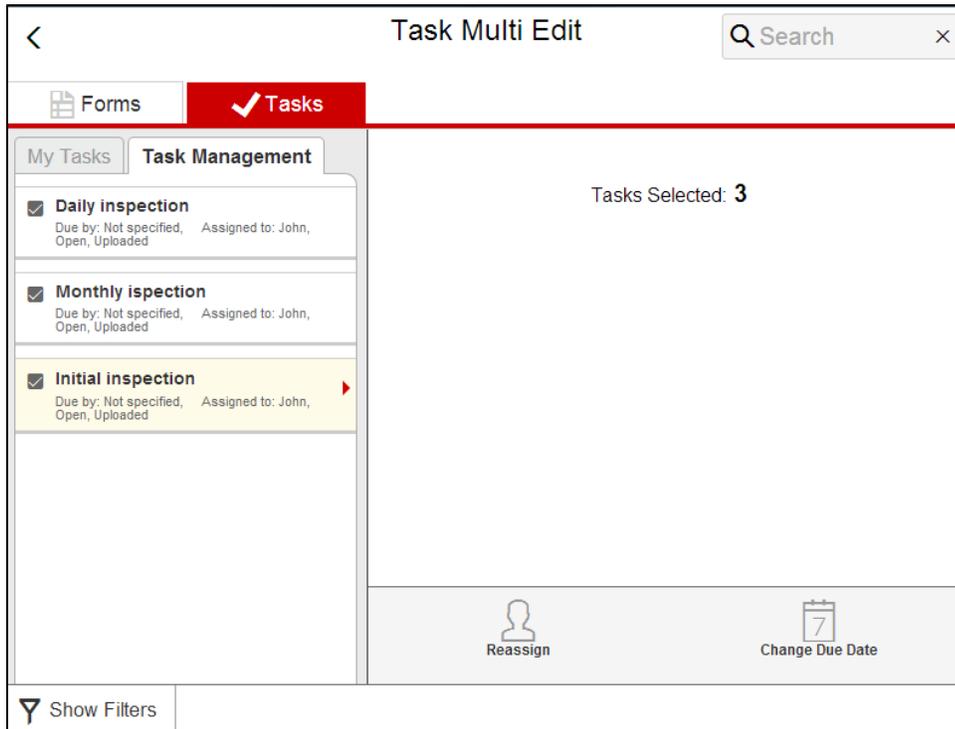
2. Task Management tab.

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.



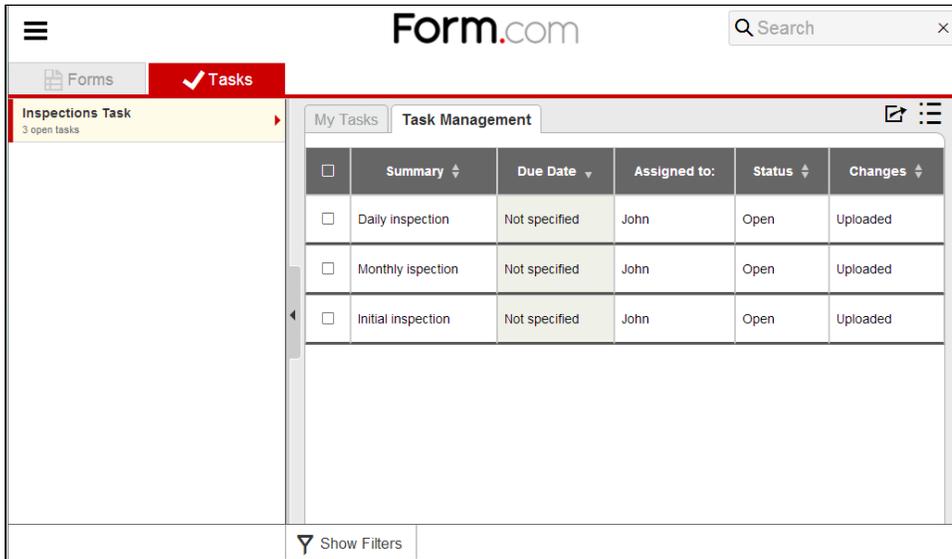
The following options will become available once required multiple Tasks have been selected:

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

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.



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:

x 
 x 

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:

- The first row should contain the labels for each column.
- Each row in the exported file represents a task.
- 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.