

WorldAPP

v8.6 changelog

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WorldAPP

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The WorldAPP Fall'14 Release (version 8.6) together with new Form.com and KeySurvey Mobile Apps (version 6.0) give you the tools and technology you need to supercharge operations and automate collaboration. With the enhanced task and workflow management system you can define, create, manage and execute data-driven processes at the office or in the field.

Tasks

The most significant functional improvements allow to:

- Do more with tasks – change due date, reassign, reopen or edit closed tasks
- Work with tasks effectively:
 - Apply changes to multiple tasks at a time
 - Narrow down task lists with data-driven filters
 - View tasks in a table with their properties displayed in columns
- Display data about tasks in task properties. Properties are taken from answers to questions in the forms, attached to tasks
- Manage tasks of others:
 - Specify task management permissions, i.e. who has rights to view, reassign, or change due date of that tasks
 - Manage unassigned tasks or tasks of others from the mobile apps
 - Export tasks to XML
- Create workflow with steps, conditional on data from tasks' forms.

The Tasks menu consists of 2 subsections – Task Definitions and Task management. Task Definitions is a blueprint used to create tasks, it specifies who the tasks can be assigned to, task statuses, due date, workflow.

The screenshot displays the 'Task Definitions' and 'Task Management' sections of the WorldAPP interface. The top navigation bar shows 'Task Definitions | Task Management'. Below this, the 'Task Definitions' section includes a lightbulb icon and text explaining that task definitions are blueprints used to create tasks, specifying properties like assignees and next activities. A table below lists task definitions with columns for 'View Tasks' and 'Task Definition Name'. The table contains one entry: 'Demo task'. Below the table, the 'Task Management' section is visible, showing a tree view of 'Task Definitions' with sub-items 'Demo task' and 'Test1', each with a gear icon. A 'Create Task' button with a green plus sign is also present.

View Tasks	Task Definition Name
View tasks	Demo task

The Task Definition settings are accessible via tabs menu:

- Basics
 - Customize contact groups of responsible parties using filters
 - User may close a task without submitting its form. Checkbox "Form submission is required to close task" allows making form submission optional when unchecked
 - Task definitions can be attached to Forms or Surveys Enhanced for Offline
 - The same form can be used only within one task definition
- Statuses
 - Task resolutions are no longer supported
 - Administrators can let users to close the tasks when changing status of the task. Check mark "Closes task" defines the status using which the user can select to close the task
 - The setting "Assign status based on the form" allows to specify the question in the form that will contain statuses list. When filling out the form users can modify the task status.
- Due date
 - User can now enter any number of days into the "Set default due date to X days after a task was created" setting
 - The status of overdue tasks may be automatically changed to a specified status within a specified number of days past due date. This is a set up in a new "Change status of overdue tasks" setting
- Actions
 - Workflow actions can be triggered based on a logical condition. Checkbox "Based on: Logical condition on form data" allows to set up such logical condition.
 - Actions executed on event "Task closed":
 - Are not conditional upon task resolution because resolution is deprecated
 - Are conditional upon task having one of the closing statuses, which a user may specify

- Permissions

Administrator may allow to perform the following actions with tasks assigned to a user:

- Edit closed task
- Change due date, unassign, and assign a task to people from customized contact group

Administrator may select a group of users that are allowed to manage tasks assigned to other users and also can specify:

- Task managers – as a customized contact group inside the task definition's contact manager
- Managed task list – as a filtered subset of tasks that belong to task definition
- Task manager's permissions, which include: edit due date, assign to me, unassign, assign to people from a customized contact group

Administrator may grant permissions based on how information about a user (contact manager field values) is related to tasks' properties.

- Properties & Data Flow
 - Properties are data points that characterize tasks, they are displayed in task with other information about each task, e.g. status and due date. Users can specify properties to narrow down a task list they should work on. Properties' values are taken from a form that is attached to the task.
 - Data flow specifies from which for question each property is populated.
- Task filters & Columns
 - Administrator can select task properties for filtering
 - Administrator can choose what properties are displayed to a user in task views on Task management, My tasks, and Task Details pages.
- Contact filters

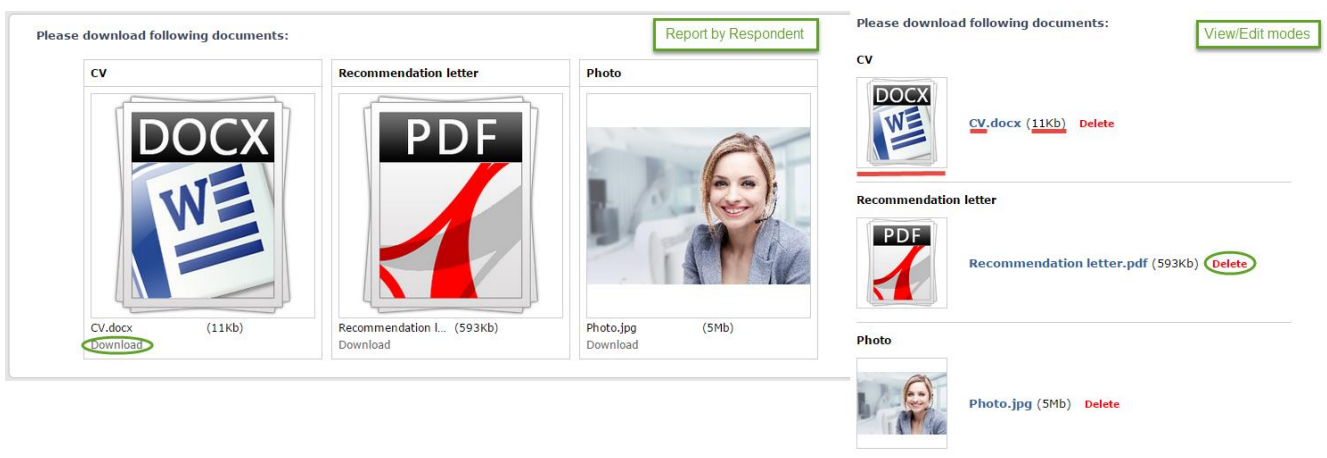
Administrator may select manager that allow users to narrow down the list of potential assignees to people with the specified field vales. Such fields are called contact filters.

Task management provides administrators with an interface to manage tasks. The following improvements are available in v8.6:

- Administrator now can:
 - Set status and set due date of multiple tasks at a time
 - Search task by a selected property or by all properties
 - View and edit submitted response, attached to a task, directly from the Task management interface
 - Narrow down the assignee list with the contact filters when reassigning tasks
 - Export tasks to Excel
- Task history will include changes to task's custom properties
- "Close tasks" operation for multiple tasks at a time is no longer available.
- The .CSV file for task import must contain new fields called "Creator ID" and "Status name". Information in these fields is optional.
- Values of custom tasks properties are updated when respondent changes answers to property-defining questions in the form record, attached to a task.

Forms and Surveys

- Built-in “Hover” functionality of the Rich text editor for questions and answer options will allow displaying customizable hints to the end users when hover or tap an item in the text.
- Import and export of translations for multilingual form or survey via .CSV file.
- Display improvements for the uploaded files. From now it is possible to:
 - Preview images in View and Edit modes as well as in report by respondent
 - Download images from Report by respondent
 - Delete and re-upload files in the Edit mode.



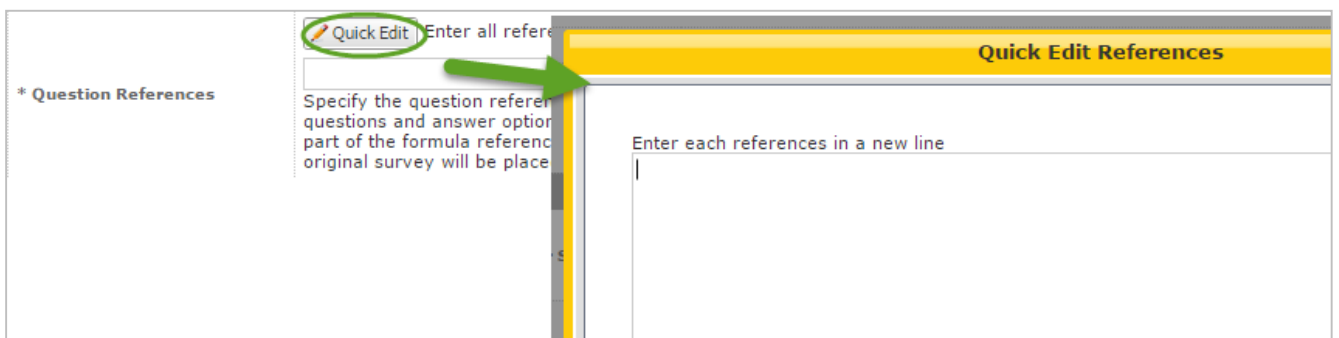
- If a form is linked to a Task definition the following settings are different from the usual:
 - For returning respondents system will let overwrite previous values regardless of the rule set on the Settings page
 - Show results to respondents, response limit and time limit functions are not available
 - Users will always return to the “Tasks” page in the portal mobile app, so Redirect page function is not applicable
 - There is no start and end date – such form are available for users till tasks are.
- Question Analysis code field length increased from 50 to 255 symbols.
- It is possible to copy questions with Calculated value from one survey to another
- “Make this form a part of the workflow” button on the Launch page allows making Forms and linear forms a part of a Task definition.



- Forms are no longer allowed to have “empty” names consisting of space characters only.

Plugins

- Task Workflow plugin has been updated to be compatible with the new task definitions:
 - Multiple instances of this plugin may be applied within one form, to allow multiple tasks creation upon submit
 - Ability to specify the “Due date” and “Assignor” fields for tasks that are created by the plugin.
 - Ability to quickly add multiple question mappings in the plugin settings
- 3D Matrix Conditional Show/hide plugin allows dynamically showing or hiding elements of a 3D Matrix questions based on logical conditions.
- Task workflow plugin creates Unassigned task if the answer option specified in the “Assignee reference” field of the plugin is empty in submitted form
- Execute on Repeat Submissions setting of Task Workflow plugin allows to specify whether a new task shall be created each time the same respondent resubmits the form or only once upon the first submission
- Respondent Counter Saver plugin has been changed:
 - The plugin will start counting with 1, not with 0 as it used to.
 - If a current respondent does not match logic criteria the plugin will not count the respondent
- The Random Sequence generator plugin can populate an answer field with a randomly generated string of characters
- It is possible to pass the file that respondent uploaded from one form to another using Copy responses plugin
- Quick editor for all Workflow plugins: question references may be edited in one textbox

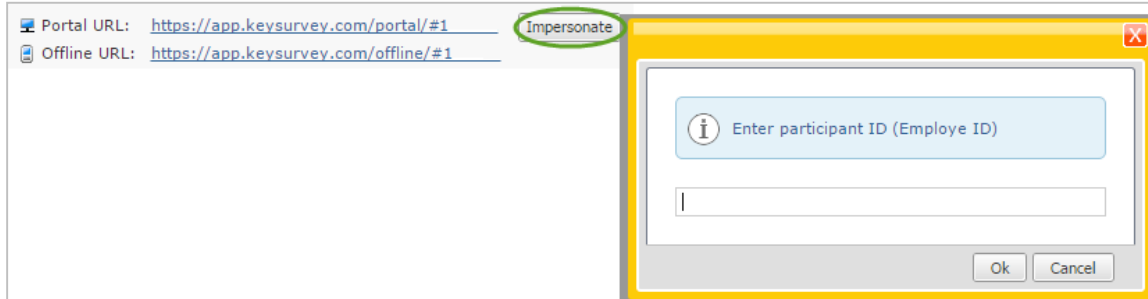


- Condition for Update/Create contact or custom data object plugin: update or create operation can be executed based on the form data and a specified logical condition.

Portal Functionality

Brand new mobile friendly online portal.

- New “Impersonate” button:



- Located on the Portal settings page
- Allows to enter the contact unique identifier and see the appropriate portal that this contact would see if logged in
- The look of the online portal will be the same as the offline portal look and portal settings will be applied to both online and offline portal at the same time.
- “Portal colors” setting will allow customization of three colors: header background color, active tabs color, and tabs icon color
- All changes will be applied on the server immediately:
 - Creating or editing a response (online voting functionality will be used)
 - Copying a response
 - Deleting a response
 - All changes to tasks
 - Editing form records, attached to tasks

New Portal feature can be activated by support representative upon customer’s request.

Reports

- The XML export for a report on a form that is linked to the Task Definition will contain additional XML tags for task properties
- Automated report delivery will no longer deliver the reports that have been moved to “Trash” as well as reports for deleted forms
- Report by respondent for Multilingual forms may be opened in a language different from the account’s default language if an additional parameter is specified in URL. The following options are available:
 - User account language
 - User browser language

- Specify the language code in the URL as a parameter – “&language=”
- Multi-access reports can open a report generated by sub-user and vice versa
- Export to SPSS: increased export size limit of answers to Multiline questions from 512 to 4000 characters

API & Integration

- Web Services API offers operations with tasks. The following operations are available:
 - Get list of task definitions
 - Get list of tasks
 - Create task
 - Re-assign task
 - Delete task
 - Update task

When requesting an XML report via remote data retrieval procedure an HTTP 403(Forbidden) status code will be returned if the user does not have permissions to access this report.

Security

- Audit log for Multi-Access account admin now includes information about the activity within sub-accounts
- Audit log will record form/survey cloning events. Event details include ID of a target account and information whether the cloned copy contains collected results
- Stricter cache-control policy for the Login page to avoid caching the page by proxy servers.
- The system logs the operations of import and export of translation file.
- The system logs logins to portal in Impersonate mode

Mobile applications

WorldAPP has released the Windows Desktop offline application.

The application has the same interface and options that are available in Form.com and KeySurvey mobile application.

Improvements implemented in mobile applications:

Navigation

- Form record filters and Task filters are accessible via Filter button
- Sorting Tasks is moved to a table view of tasks.

Forms

- Display improvements for the uploaded files. From now it is possible to:
 - Preview images in View and Edit modes as well as in report by respondent
 - Download images in View mode
 - Delete and re-upload files in the Edit mode.
- Forms and form records, attached to tasks, are no longer visible on the "Forms" tabs.
- Sorting form records is no longer possible. The records are sorted by create date(latest on top)
- User can view completed form records in read-only mode, without editing them
- When the form record is copied the new record has the "In progress" status.

Tasks

New way to work with own tasks, based on administrator's settings:

- View tasks in a table view
- View tasks' properties
- Sort task properties in a table view
- Narrow down a task list with filters
- Reassign, unassign, change status, change due date, or upload multiple tasks at a time
- See a number of changed data items, i.e. form records and tasks, that have not been uploaded
- See the number of open tasks assigned to you for each one of the Task definition
- Only Task Definitions where the user is in Responsible Parties or that user is allowed to manage will be displayed in the list of Task Definitions

New actions on own tasks based on permissions:

- Change due date, unassign or reassign own tasks to someone else
- Close tasks without submitting an attached form, if it is allowed in a task definition
- Set task's status by answering to a specific question of an attached form. The status is updated automatically when user changes answer to a question and saves the form record.
- View an attached form record of a closed task
- Edit closed tasks
- Export tasks to XML(Windows only)

The following information about tasks is no longer displayed to users:

- No resolutions – they have been deprecated
- Linked form name

- Time of the last change, made to a task
- Name of a task creator, i.e. "Created by" field.

Task history is available from mobile applications and portal users with Task management permissions.

Task management tab – a way to work with unassigned tasks or tasks assigned to others. Works only when internet connection is available.

- View unassigned tasks or tasks assigned to others including their attached form records
- Sort tasks by properties
- Narrow down a task list with filters(Specified in Task filters settings)
- Assign to oneself, unassign, reassign or change due dates of tasks
- Take action on multiple tasks at a time
- Tasks may be exported to Excel from the "Task management" tab

Other

- Proper version number is displayed on the Settings page instead of the build number
- Ability to send the backup data to WorldAPP for issue investigation
- The unsynchronized data counter includes modified Task data