

Form.com

Mobile App How To



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What is Form.com Mobile application?

Form.com Mobile application lets you collect data using forms in areas where internet is not available.

You can download the application from

- [iTunes App store](#)
- [Google Play Store](#)
- *Alternatively users who have stable internet connection can take an advantage of the web version of the mobile application. Please follow this link to access the application via a web browser:*
<http://app.form.com/offline/>

Form.com Mobile is available for the following devices:

- iPhone 4S, 5, 5S, 6, 6 Plus with **iOS 7 and higher**;
- iPad 2, 3, 4, Air, Air 2, Mini 1, Mini 2, Mini 3 with **iOS 7 and higher**;
- Android phones and Tablets with **Android 4.0 and higher**;
- Form.com Mobile application for **Windows desktop**

How to start working with the mobile application?

There are few steps to that:

- Set up a forms for remote data collection;
- Upload a list of contacts who be granted an access to the mobile application;
- Publish your forms to the Participant Portal;
- To collect data offline on your mobile device download the mobile application or visit <http://app.form.com/offline/> for browser access.

1. Create your form

Form.com Mobile application allows to access and fill out forms that have been previously created within the Form.com tool. Once you have created a form, the platform itself will indicate whether it is compatible with mobile application or not.

Please follow few simple recommendations when creating your forms.

- Use Linear Forms for data collection on a mobile device. Custom forms can be used as well, however their layout should be designed for one specific size of the device screen.
- When creating the layout for the Linear form don't apply fixed width in the css code of the form. Let it adjust to the screen size.
- Feel free to select one of the mobile layout themes in the Form.com library.
- Apply plugins to the form that are marked as compatible with mobile application.

The following form types cannot be accessed through the mobile application:

- Custom forms from Trash folder (or forms deleted from Trash);
- **Surveys** with any type of logic;
- **Common-password surveys.**

The features below would not work even if the form becomes available inside the application:

- Show results to respondents;
- Redirect Page.

Note: Multilingual forms are shown in the default language only. If the form language is pre-filled by the "Data flow" functionality the form will be displayed in the required language.

The following plugins can be used in forms which will later be accessed offline from the **Form.com** Mobile application:

- Create contact or custom data object*
- Update contact or custom data object*
- Respondent ID Saver*
- Score Calculator*
- External JDBC database writer*
- 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

Plugins marked with * are executed upon the synchronization.

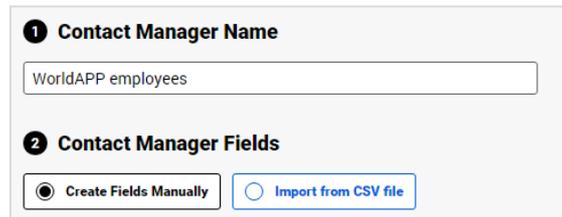
The application includes an indication of whether or not the Plugin is compatible with offline data collection. In case if Plugin is compatible with offline data collection, small picture of mobile phone with green plus sign will be shown close to "Insert" data. In other case, picture of mobile phone with red minus sign will be displayed. Example of compatible and non-compatible plugins showed on the image below:

Exclusive	This plugin is used to tag certain answer options of a 'Check all that apply' question as exclusive and disable other options for selecting. Before setting this plugin, add the <exclusive/> tag to the answer option you want to tag as exclusive.	Insert 
Fixed Header for Rate and Matrix Questions	This plugin is used to display answer options for 'Rate along the scale' or '3D Matrix' questions in a scrollable area with fixed height and fixed header. It is commonly used for questions with a long list of answer options.	Insert 

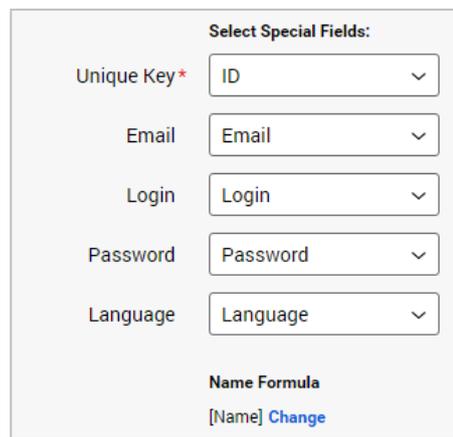
2. Setup user logins and password

Form.com uses Contact Manager within your account as a database of respondents.

If there is no Contact Manager in your account yet, go to the Contacts tab and click the **New** button. Name new Contact Manager and select one of the methods of database creation:



1. Select the **Create contact list by manually editing fields** option to add Contact Manager columns manually. The upload file with data option allows adding contacts to the Contact Manager in batches. More details on this option can be found [here](#) in our Help center.
2. Once you have added all necessary fields, assign any mandatory fields and click Save.



-**Unique key** – contact identifier, has to be unique for each respondent.

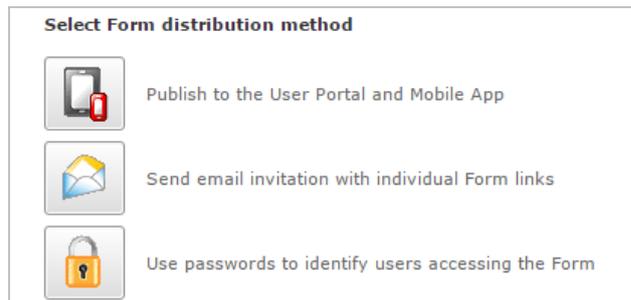
-**Email** – respondents' email address.

3. Now click the **Add Contact** button and complete profile data for each user or upload a file with a list of users.



3. Publish the form to users

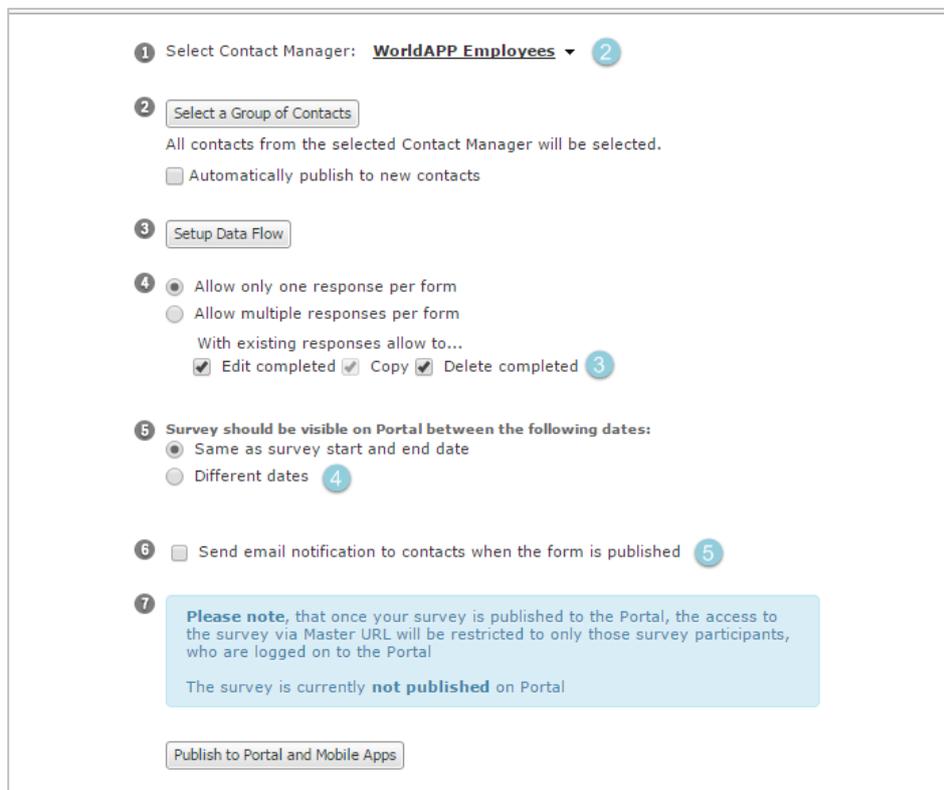
1. Go to the Launch page and select Publish to the User Portal and Mobile App.



Select Form distribution method

- Publish to the User Portal and Mobile App
- Send email invitation with individual Form links
- Use passwords to identify users accessing the Form

2. Select **Contact Manager** and list of users you would like to allow accessing a form. If you have already created recipient **groups** in your Contact Manager, select them and click Next. Otherwise, you can proceed with creating a new group. Click **Select a Group of Contacts** button and then:
 - Click New filter and set filters by any criteria to select a list of users that will receive the form once it launched;
 - The filter can also be set by specified activity criteria;
 - Save created filters.
3. Indicate and **Save** response modification rights.
4. Specify and save form availability date range.
5. Indicate whether to send email notification to your contacts when the form is published or not.



1 Select Contact Manager: **WorldAPP Employees** 2

2 Select a Group of Contacts
All contacts from the selected Contact Manager will be selected.
 Automatically publish to new contacts

3 Setup Data Flow

4 Allow only one response per form
 Allow multiple responses per form
With existing responses allow to...
 Edit completed Copy Delete completed 3

5 Survey should be visible on Portal between the following dates:
 Same as survey start and end date
 Different dates 4

6 Send email notification to contacts when the form is published 5

7 **Please note**, that once your survey is published to the Portal, the access to the survey via Master URL will be restricted to only those survey participants, who are logged on to the Portal
The survey is currently **not published** on Portal

Publish to Portal and Mobile Apps

4. Setup Data Flow

Upon completing setup of the data flow functionality, specified Contact manager fields will autofill form questions or responses to the mapped question will be added to the contact manager.

1. Select the question and Contact manager field you would like to map.
2. Specify data flow direction (To, From or To and From)
3. Apply the mapping.

You are now ready to Publish form to the User Portal and Mobile application.

4. Provide access details to mobile application users.

To log into the Form.com Mobile application, users would need to have the Portal ID(1), and their Login and Password.

To define which fields of the Contact Manager will be used for respondent authentication, select these fields on the Portal page under the Authentication types section. (2)

Note: These fields can only be defined once and cannot be changed once settings applied to the Participant Portal.

If users from multiple Contact Managers will access the portal, then the declaration of the credentials ought to be done for each Contact Manager. (3)

Forms and Tasks tabs' names can be changed on the Participant Portal page. (4)

WorldAPP Employees

Portal URL: <https://app.keysurvey.com/portal/#975017> | Offline URL: <https://app.keysurvey.com/offline/#975017> | Portal ID: 975017 | [View Impersonate](#)

Portal logo:

 [Change logo](#) [Delete logo](#)

FDC, logo_500px.png

Change the colors to match the logo?

[Yes, change the colors](#) [No, do not change](#)

Header background color Tabs font: Forms, Tasks, + Add New

Active Tabs: Forms, Tasks, + Add New Menu color: Navigation

4 Available tabs:

Tasks

Forms

[Reset to default names](#)

Links to be displayed on the portal:

Logout

[Add new link](#)

[Reset to default names](#)

Portal languages:

Default language: English

To make your portal multilingual, please create a new language column in your Contact Manager:

[Create language column](#) or select an existing column: [Choose column](#) [Set](#)

After you create or set existing column you will be able to change it in the Contact Manager

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

Allow to Pin responses and tasks:

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

Yes

No

2 Authentication types:

Login: [Login](#)

Password: [Password](#)

Require password change on first login for all new users

[Require password change for all existing users](#)

Step-by-step instructions for mobile application users.

1. Install **Form.com** Mobile application on your mobile device and launch it.
2. Specify **Portal ID**, your **login** and a **password** provided by the portal administrator.
3. Form.com Mobile application synchronizes any launched forms and completed responses with the database upon logging in and later if the respective option is selected from the menu.

Note: During the first synchronization Data models used in forms are downloaded and made available to you on your device. If they were edited/updated by form administrator, you would need to click Synchronize once again in order to see the changes made.

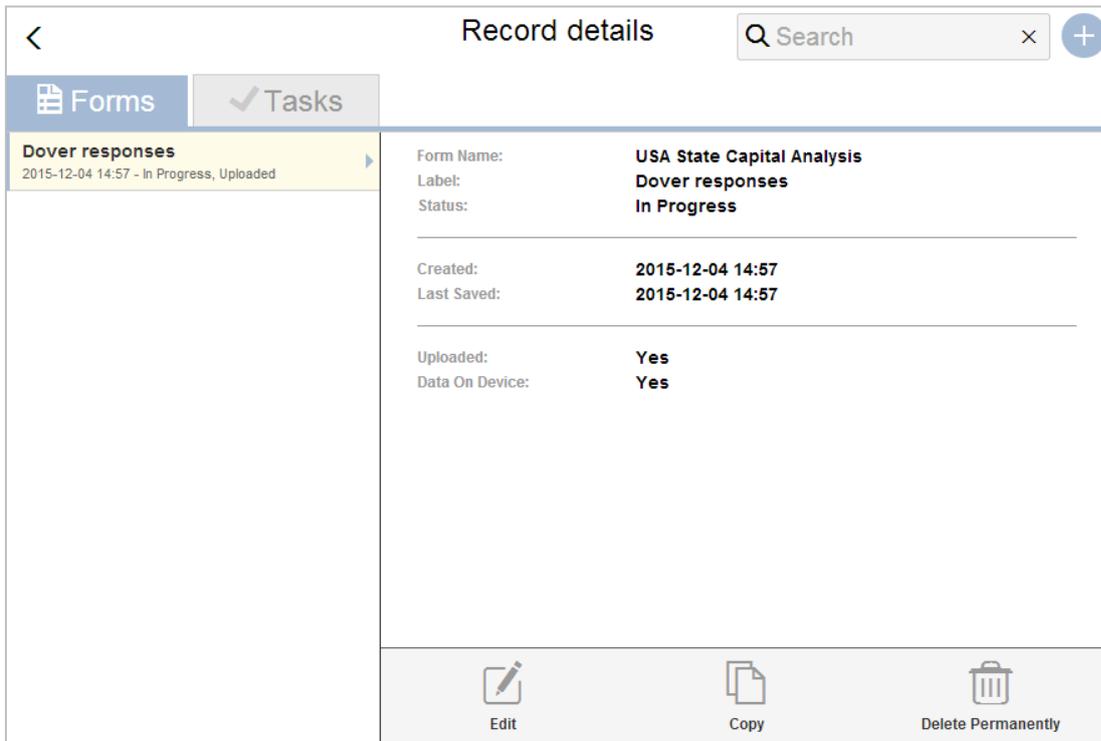
4. Forms and tasks downloading process will start.

Mobile Forms Functionality



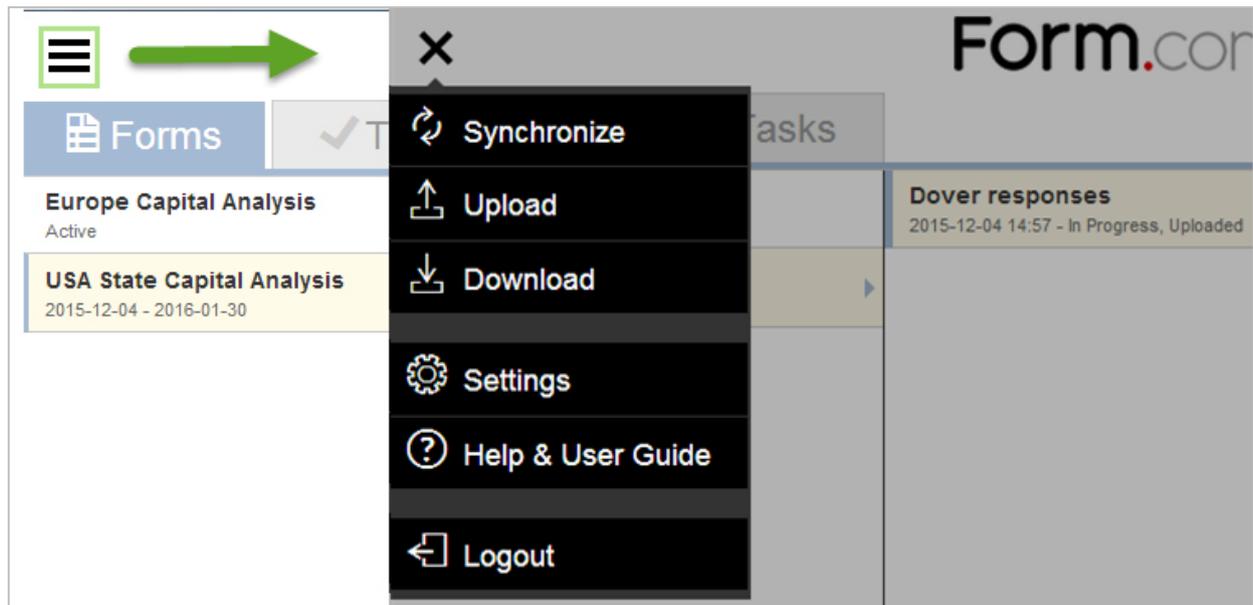
1. **Form** name
2. Dates when the form is available
3. Date when response was submitted
4. List of responses for the particular form
5. Click to **add** a new response for selected form
6. Click to **copy*** the response.

To edit*, copy* or delete* the response, select necessary response in the list and click on its name:



Note: Options, marked with * available only if a respective properties were set on the "Publish on Participant portal" page.

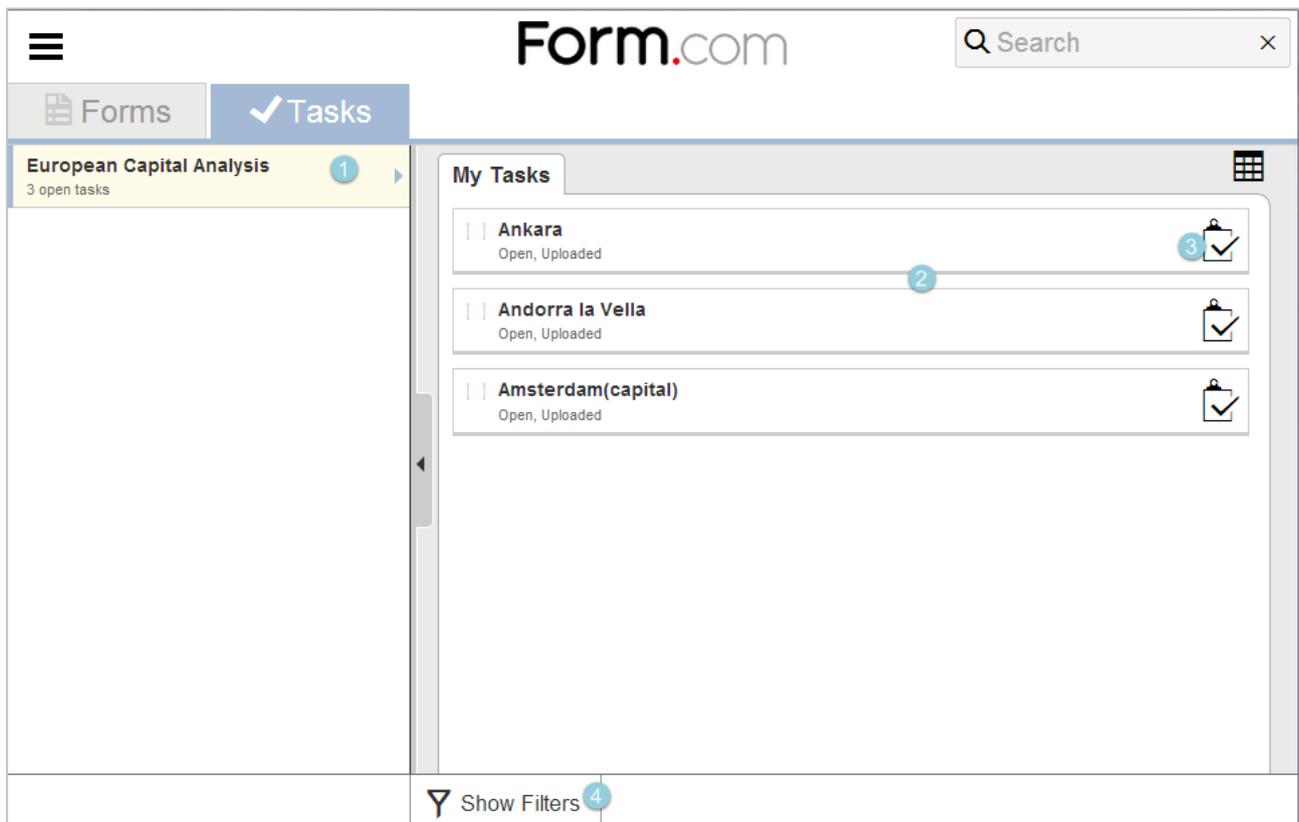
To logout, synchronize and download responses to your device, navigate to the functional menu of the application that is located in the top left corner. Select necessary option from the list:



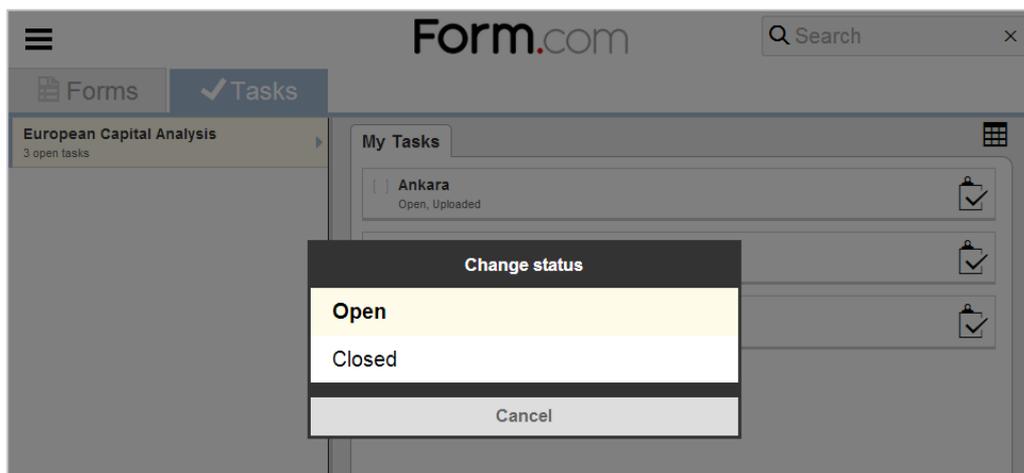
This is a preview of a portal's appearance when accessed from the PC:



Mobile Tasks Functionality.



1. Task definition
2. List of tasks available to the user
3. Click here to modify the status of task.



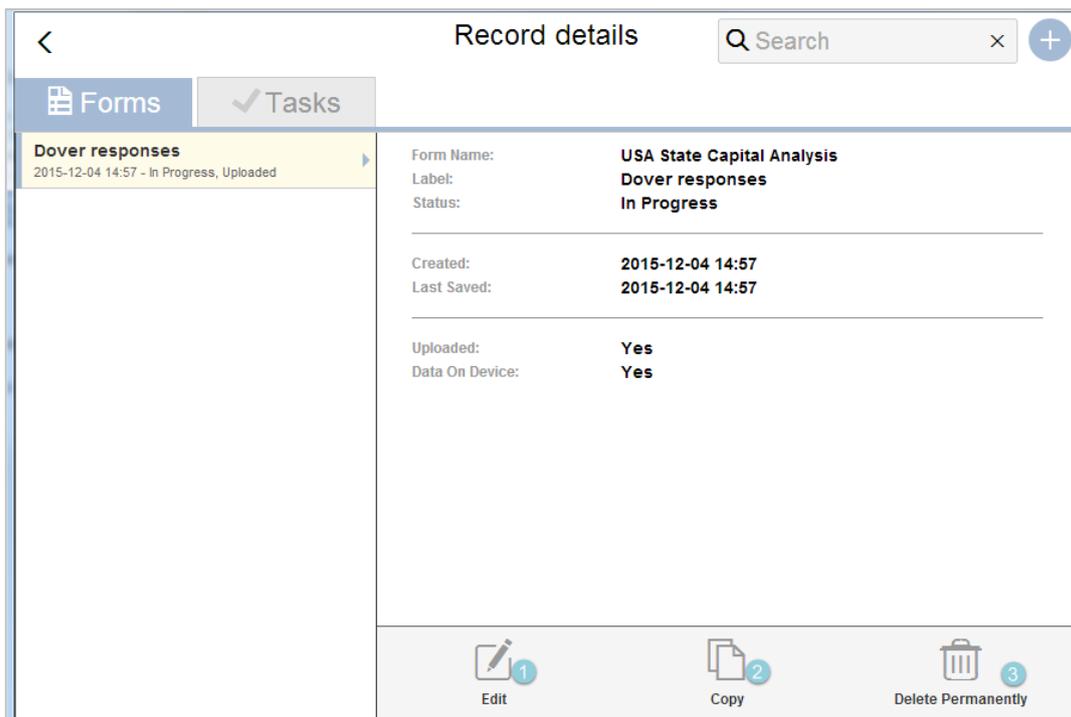
4. Click here to filter the list of Tasks.

Response section

1. Click the "Add new" button to create a new response.



2. Click on the response's name to edit(1), copy(2) or delete(3) the response permanently.



Useful sources

- Online WorldAPP help: <http://helpcenter.worldapp.com>
- For more information contact WorldAPP support team:
 - US (781) 849-8118
 - US (888) 708-8118
 - UK +44(0)8451-303345
 - Email: support@worldapp.com