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OSOS

OSOS DOCUMENTATION

Using OSOS

A section of the OSOS Documentation and Help Center

English edition

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Guides · How-to

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Start Here

This section is for people who work **in** the OSOS portal, on the web or on the mobile app: employees, team leads, approvers and members of the public who fill in a form. It shows you how to submit and follow requests, approve the ones that come to you, find and update records, and stay on top of your notifications. You don't need to build or configure anything.

Your organization decides what you see. Its builders publish the applications, forms and lists you use, and its administrators decide who can open what. Two colleagues can see quite different portals, and that is normal.

Your first 10 minutes

1. Sign in

Open the address your organization gave you, or the mobile app. Enter your username or email and your password, then select **Sign in**. Tick **Remember me** to stay signed in on that device. If you've forgotten your password, select **Forgot password?** and follow the email you receive. Your organization may also ask for a second check, such as a code from an authenticator app.

More: Signing In & Choosing a Space · Account Security

2. Look around

- The **top bar** has the menu button, your organization's logo (select it to go home), where you are, **search** (or press **Ctrl + F** or **F3**), the notifications bell, and your profile menu.
- The **sidebar** on the left lists what you can open: your spaces, the **Services** group, and the applications and lists published to you. It only shows what you're allowed to open.
- The middle of the screen shows whatever you select.

More: Portal Layout & Navigation

3. Find your services

In the sidebar, open **Services** › **Services Catalog** and search for what you need, for example *leave* or *laptop*.

4. Submit a request

Open the service, select **New Request**, fill in the form, select **Save**, and then send it on with the first step's button, such as **Submit**.

Step by step: Submit & Track a Request

5. Check your Outbox, Inbox and notifications

- **Outbox** lists the requests you submitted and where each one stands. A request marked **Pending Your Action** is waiting for you.
- **Inbox** lists other people's requests that need your action.
- The bell at the top shows your notifications, such as **Action Required** when a request reaches you.

More: Services & Submitting Requests · Receiving Notifications

What do you want to do?

Requests and approvals

- Submit a request and follow it
- Fix a request that was sent back to you
- Approve, reject or return a request in your Inbox
- Watch requests you don't act on

Records and lists

- Create and edit records
- Search, filter and sort a list
- Change how a list looks or save your own view of it
- Keep records together in collections and lists
- Archive and restore records
- Export a list to Excel, CSV or PDF

Working with others and staying informed

- Comment, mention colleagues and attach files
- Read and manage your notifications
- View dashboards and reports (reports are available on the web only)

Your account and the portal

- Secure your account and reveal protected values
- Switch between spaces
- Set your language, theme, sidebar style, font size and time zone
- Use the mobile app, and what works where

Questions not answered here: Using the platform FAQ.

Can't see something you expected?

What appears in your portal is set by your organization, not by you. If a service, list, button or record you expected isn't there:

- **You may not have permission.** Your administrator decides who can open each application, list and service, and who can see each record. Ask them for access.
- **It may be limited to certain people.** A service can be published to particular groups only. See Why a service may be missing.
- **The screen may be set up without it.** The person who built a screen chooses which buttons, fields and tabs it shows. Ask the owner of that application.
- **You may be in another space.** If your organization uses several spaces, switch to the right one. See Signing In & Choosing a Space.
- **You may be acting for someone else.** While you work on behalf of a colleague who delegated to you, you only see what they delegated.

When you ask for help, say which screen you were on and what you expected to see.

Where to go next

1. Make your account safe: Account Security.
2. Get to know the portal: Portal Layout & Navigation.
3. Learn the request basics: Services & Submitting Requests.
4. If you approve requests: Executing Workflow Actions.
5. If you work with lists of records: Working With Data.

New to OSOS altogether? Overview [General] explains what the platform is and what organizations use it for.

Signing In & Choosing a Space

This page is for everyone who signs in to the OSOS portal, on the web or in the mobile app. It shows you how to sign in, how to confirm it's you when you're asked for a code, what to do if you've forgotten your password, and how to move between the spaces your organization gives you. It ends with what to do when the portal won't let you in.

To set up an authenticator app, passkeys or recovery codes, or to see where your account is signed in, see Account Security.

How it works

Your organization gives you a web address for the portal, for example `portal.example.com`. When you open it and you aren't signed in, you're taken to your organization's sign-in page. That page only offers the ways in that your organization allows: a username and password, a passkey, or a button for an outside account such as a national digital identity or your company's Microsoft account.

A **space** is a separate workspace inside your organization, with its own records, lists and services. Each space has its own web address, so the address in your browser decides which space you're in. Many people only ever have one.

An example. Omar works for a company with two spaces: *Head Office* at `portal.example.com` and *Sales* at `sales.portal.example.com`. He signs in at the first address with his username and password, types the code his authenticator app shows, and lands on his home page in *Head Office*. Later he picks *Sales* from the space list at the top of the sidebar, and the portal opens the *Sales* address, where he works with the sales team's records.

Sign in

1. Open the address your organization gave you, or open the mobile app.
2. Enter your **Username/ Email** and your **Password**.
3. To stay signed in on this device, tick **Remember me**.
4. Select **Sign in**.

   Instead of a password, you can select **Use Passkey** if you've set one up, or the **Sign in with …** button for your organization's outside account. You only see the options your organization has turned on.
5. If you're asked for a code, follow Confirm it's you.

You land on your home page, or on the page you were trying to open.

If the sign-in page offers **Sign up**, your organization lets new people create their own account. Select it and follow the steps.

If you signed in with your password and have no passkey yet, the portal may offer to set one up on a **Register Passkey** page. Select **Register Passkey** and follow your device's prompt, or select **Skip** to do it another time.

Your first sign-in

The first time you sign in, a welcome page greets you by name. Select **START USING** followed by your organization's name (for example **START USING OSOS**) to go into the portal. If your organization has set up a guided tour, it starts at that point; select **Skip** to close it. You won't see the welcome page again, but you can open it later from **Help** in your profile menu.

You followed a link to a page `Since 1.6`

If a colleague or an email sent you a link to a page in the portal and you aren't signed in, you're asked to sign in first and then taken straight to that page. If you're already signed in, the page opens at once. Only links to pages inside the portal work this way.

If you press **Back** on the sign-in page, you go to the portal's home page.

`Since 1.10` Your organization can also give you a sign-in link that goes straight to one particular outside account, for example the national digital identity, instead of showing you the choice of sign-in methods.

You went straight to your outside account `Since 1.10`

If the only way into your organization is one outside account, with no password, passkey or sign-up option, the portal doesn't show you a sign-in page with a single button. You go straight to that account's own sign-in page.

If that sign-in fails, or your account still has to be linked, you're brought back to your organization's sign-in page so you can read the message. You won't be sent back and forth in a loop.

Cancel signing in `Since 1.4`

To stop signing in, select **Cancel** on the sign-in page. You go back to the portal's home page. The same happens if you leave the sign-in page untouched for ten minutes.

If you went straight to an outside account, there is no **Cancel** link on your organization's page. Use the cancel option on the outside account's page.

Confirm it's you

After your password, or after signing in with an outside account, your organization may ask you to prove it's you a second way. You see the **Two-Factor Authentication** page.

1. Get your code:
    - **Authenticator app** `Since 1.8`: open the app on your phone and read the current code.
    - **Text message**, **WhatsApp** `Since 1.10` or **Email**: the code is sent to you. The page says where it went.
2. Type it into **Verification Code** and select **Verify**.

You can also:

- **Use another method.** Under **Use a different method:**, pick another way you've set up: **Authenticator app**, **Text message**, **WhatsApp**, **Email**, **Passkey** or **Recovery code**.
- **Ask for a new code.** Under **Didn't receive the code?**, select **Resend Code**. If a timer is shown, wait for it to finish first.
- **Use a recovery code** `Since 1.10` if you've lost your authenticator app. Choose **Recovery code** and type one of the codes you saved. Each code works once.

`Since 1.8` The page opens on the method you used last time. That choice belongs to your account, not to the computer, so if a colleague signs in on the same computer after you, the page opens on their method.

If your organization doesn't ask for a second step, or you have no second method, you're signed in straight after your password.

How to set up these methods is in Account Security.

A background check you may notice `Since 1.8`

Your organization may check that a real person is signing in. The check can run when you sign in, when you enter a second-step code and when you reset your password.

You don't have to do anything: there are no pictures to pick and no text to type. Your browser does the check in the background, and you may notice a short pause.

If the check can't run, usually because the service behind it is down, you can't sign in, confirm your code or reset your password, and waiting won't help. Tell your organization's support team. If sign-in stops working for everyone at once, mention this check when you report it.

Public forms can use a similar check. See Submit a public form without signing in.

Sign in with an outside account

If your organization lets you sign in with an outside account, such as a national digital identity or your company's Microsoft account, select its **Sign in with …** button. You sign in on that account's own page and are then brought back to the portal.

- **Your accounts are already linked.** You're signed in.
- **The portal doesn't recognize your outside account.** An **Account Not Found** page appears.
  - Select **Link my existing account** to connect the outside account to the portal account you already have. You confirm by signing in to the portal account once. You only do this once.
  - If your organization allows it, you can select **Create new account** instead.
  - If neither option is offered, ask your administrator to set up your account.
- **Your details are kept up to date.** Your organization may copy your name and other details from the outside account each time you sign in. If that copy fails, you're still signed in.

Forgot your password

1. On the sign-in page, select **Forgot password?**.
2. Enter your **Email** and select **Reset Password**.
3. The page says **Check your email for a link to reset your password**. You see this message whether or not the address belongs to an account, so nobody can use the page to find out who has an account.
4. Open the email and select the link.
5. Enter your new **Password**, type it again in **Confirm Password**, and select **Reset Password**.

Only the newest reset link works. If you asked more than once, use the latest email. For more about reset links, and how to change your password while signed in, see Your password.

If you sign in with an outside account, your password belongs to that account. Reset it there.

Choose a space

If you belong to more than one space, a space list appears at the top of the sidebar. It shows the space you're in now.

1. Open the space list at the top of the sidebar.
2. Select the space you want.

The portal opens that space's address. This is a new page load, so you may see the sign-in check for a moment before the space opens.

If you belong to only one space, there is no space list. While you're acting for a colleague who delegated work to you, the space list is hidden.

You can't open a space

- **The space isn't in the list.** You aren't a member of it, or it has been switched off. If you were added only a moment ago, reload the page after a short while. If it still isn't there, ask your administrator.
- **You opened a space's address but aren't a member.** A page says **You don't have access to this space!** and lists the spaces you can open. Select one of them.
- **The space is under maintenance.** Your administrator has closed it for a while. Wait until they open it again.

Your administrator decides who belongs to each space and can switch a space off. The main space of your organization can't be switched off.

When the portal can't start `Since 1.10`

Before the portal opens, it collects its sign-in settings for the address you used. If that fails, you see a short page in English and Arabic that says why, with a block of details and a **Retry** button.

Message	What to do
This address is not linked to an organisation.	Check the address. Use the one your organization gave you.
The sign-in service is not available on this server.	Contact your support team.
This organisation is still being set up. Please try again shortly.	Wait a few minutes, then select **Retry**.
The sign-in service returned an error. / **could not be reached.** / **took too long to respond.**	Usually temporary. Wait a moment, then select **Retry**.
The sign-in configuration is not supported by this version of the app. / **The application configuration could not be loaded.**	Contact your support team.

When you contact support, send a screenshot of the whole page. The details block holds what they need to find the problem.

Separately, if you select **Sign In** and the sign-in service can't be reached, you see an error message.

While your organization is being restored or moved `Since 1.10`

Sometimes your organization's data has to be restored from a backup or moved to another server. While that runs, sign-in is refused with a message such as *This tenant is being restored from a backup. Try again shortly.* If it happens while the portal is starting, you see **This organisation is still being set up. Please try again shortly.**

Nothing is wrong with your account. Wait a few minutes and try again. Sign-in works again as soon as the work finishes.

Good to know

- **Every sign-in is recorded.** Successful and failed attempts on your account are kept, so you can check for sign-ins that weren't you. See Sessions & Sign-in Attempts.
- **Signing out** ends your session in the portal. If you were acting for a colleague, signing out also stops that, so your next sign-in starts as yourself. To sign out, select your picture at the top of the page, then select **Sign Out**.
- **The mobile app** signs you in with the same sign-in page. How to add your organization to the app is in Get started with the mobile app.
- **Choosing a language.** The sign-in page opens in the language the portal is using.

Troubleshooting

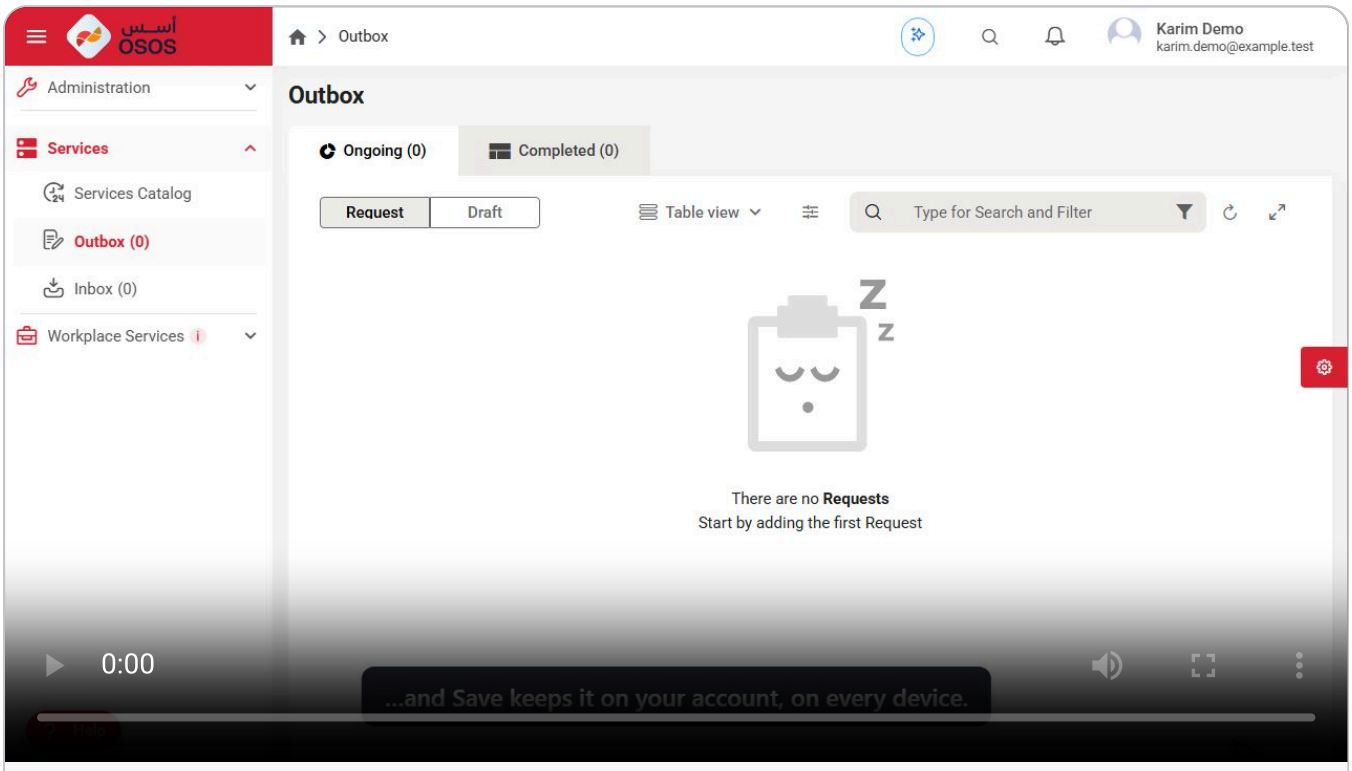
What you see	What to do
Invalid username or password.	Check both, including the keyboard language and Caps Lock. If you've forgotten your password, reset it.
Account is locked	Ask your administrator to unlock your account.
The account is deactivated, Please contact with your system administrator	Your account has been switched off. Ask your administrator.
Invalid verification code. Please try again.	Type the code again. For an authenticator app, use the code showing now, not an older one.
Verification code has expired. Please request a new code.	Select **Resend Code**.
Too many failed attempts. Please request a new code.	Select **Resend Code** and type the new code carefully.
Failed to send the verification code over WhatsApp. Please try again.	Select **Resend Code**, or choose another method under **Use a different method:**.
We couldn't verify that you're human. Please try again.	Try again. If it keeps failing, tell your support team. See A background check you may notice.
Sign-in keeps failing after many tries in a row	The sign-in service briefly blocks a device that sends too many sign-in requests. Wait about 15 minutes and try again.

Go deeper

For administrators: Identity providers [Administration › Sign-in methods & single sign-on] · Spaces & domains [Administration] · For integrators: Portal sign-in and spaces (internals) [Integrate & Extend] · Authentication & OAuth [Integrate & Extend] · For operators: Identity server

Portal Layout & Navigation

This page is for everyone who works in the OSOS portal on the web. It shows you what's on the screen, how to get to the things you use, and how to set the portal up the way you like it: language, theme, sidebar style, text size and time zone.



HOW-TO Find your way, and make it yours

The sidebar, the bell, your menu — and Quick Settings: Save or Apply · 0:44 · Recorded on OSOS 1.11.0-alpha.1

Using the phone instead? The mobile app is laid out differently. See Web & Mobile.

How it works

The portal has three areas:

- **The top bar** across the top: the menu button, your organization's logo, where you are, search, notifications and your profile menu.
- **The sidebar** on the left: your spaces, the **Services** group, and the applications and lists your organization has published to you.
- **The content area** in the middle, which shows whatever you select.

What you see depends on what your organization has given you. Two colleagues can have quite different sidebars, and that is normal.

An example. Khalid opens the portal and lands on his team's home page. He opens **Services** › **Inbox** in the sidebar to approve a request, then expands the *Assets* application and selects *Laptops* to check a record. Later he finds the text

small on his new screen, so he opens the settings panel, makes the text one step larger and selects **Save**. The next day the larger text is there on his laptop too.

The home page

When you open the portal, or select your organization's logo in the top bar, you see your **home page**. Your organization decides what it shows, and different people can have different home pages. Some home pages send you straight on to another page.

The sidebar

From top to bottom, the sidebar can hold:

Part	What it is	Who sees it
Administration	Tools for setting up the portal.	Only people with administration access.
Space list	The space you're in, and the others you can switch to.	People who belong to more than one space. See Choose a space.
Services	**Services Catalog**, **Outbox**, **Inbox** and **Watching**.	People whose organization uses services.
Your applications	Applications, with their pages, lists and reports.	Everyone, for whatever has been published to them.

Services

The **Services** group is where you submit and follow requests:

- **Services Catalog**: the services you can submit.
- **Outbox**: requests you submitted. The number next to it counts the ones still in progress.
- **Inbox**: other people's requests waiting for you. The number counts the ones still in progress.
- **Watching**: requests you follow without acting on them. It only appears if you've been named as a watcher of a service.

How to use them: Services & Submitting Requests.

Your applications and lists

1. Select an application's name to open or close it. The name only groups what's inside; it doesn't open a page.
2. Select a page, list or report inside it to open it.

Under a list you may also find:

- **your saved queries** for that list, your own filters saved under a name;
- **your collections** for that list, groups of records you put together; and
- **collections shared with you** by colleagues.

Each kind has its own small icon so you can tell them apart. See Saving Custom Views and Collections & Lists.

Reports open on the web only. The mobile app doesn't list them.

Why something isn't in your sidebar

The sidebar only lists what you're allowed to open. Something is missing when:

- it hasn't been published, or it's been archived;
- it's limited to particular people or groups, and you aren't among them;
- it's meant for visitors who aren't signed in, or only for signed-in people;
- it belongs to another sign-in address of your organization; or
- you're acting for a colleague, and they didn't delegate it to you.

If you need something that isn't there, ask your administrator.

If your account is restricted `Since 1.8`

Some accounts are set up as **restricted**. A restricted account doesn't see the space list or the **Services** group. Its **Administration** menu shows at most **Modules** and **Data Entities**, depending on what the account was given, and the sidebar shows only the applications and lists the account has access to.

The top bar

From left to right (right to left in Arabic):

- **Menu button**: hides or shows the sidebar.
- **Your organization's logo and name**: select to go back to your home page.
- **Where you are**: the path to the current page. On a record, arrows let you step to the previous or next record in the list.
- **Search**: opens search across the portal. You can also press **Ctrl + F** or **F3**. Select outside the search panel to close it.
- **OSOS AI**: opens the AI assistant beside the page. It only appears if your organization has turned it on.
- **The bell**: your notifications. The number shows how many you haven't read, up to **99+**. See Receiving Notifications.
- **Counters**: some organizations show live numbers next to the bell, such as the number of open tasks.
- **Your picture, name and email**: opens your profile menu.

On a small screen the same controls are arranged in a compact row.

Your profile menu

Select your picture to open the menu:

Item	What it does
User Preferences	Opens your profile and security settings. See User Preferences.
Delegations	Lists colleagues who delegated work to you. Select one to act for them.
Unmask / **Disable unmask**	Reveals protected values for a while, or hides them again. See Reveal a masked value.
Help	Opens the welcome page.
Start Tour	Starts a guided tour of the page. Only shown to administrators, where a tour exists.
Sign Out	Signs you out.

While you act for a colleague, the top bar shows a badge with their name next to yours, and a button to stop acting for them and go back to being yourself.

If you aren't signed in, you see **Sign In** instead of your picture.

Set your preferences

1. Select the gear button at the edge of the screen. The **Quick Settings** panel opens.
2. Under **Display Settings**, choose:
    - **Theme**: the colours of the portal.
    - **Scale**: select **−** or **+** to make all text smaller or larger. There are five sizes.
    - **Mode**: **Light** or **Dark**.
    - **Sidebar**: how the sidebar behaves. **Icons** (the usual choice), **Static**, **Overlay** or **Slim**.
3. Under **Regional Setting**, choose your **Language**, **Time Zone**, **Date Format**, **Time Format** and **Date Time Format**. Choosing Arabic turns the layout right-to-left.
4. Save your choices:
    - Select **Save** to keep them on your account. They follow you to every browser and device you sign in on.
    - Or open the menu next to **Save** and select **Apply** to use them in this browser only, until you close it. The page reloads.

You see most changes as you make them. **Cancel** closes the panel and undoes them. **Reset** puts everything back to the default. The panel also shows the version of the portal, which is useful when you report a problem.

If you aren't signed in, there is only **Apply**.

User Preferences

Select your picture, then **User Preferences**. The page holds your details and security settings as a list of cards: **Profile** (your basic and organization information), **Account**, **Security** (password, two-factor authentication, passkeys) and **Logins** (sessions and sign-in attempts).

To edit your name, birthdate, gender or picture, select **Edit** on the **Basic Information** card.

`Since 1.10` An index helps you move around the page:

- **On a wide screen**, the index sits beside the cards and stays in view as you scroll. It's grouped as **Profile**, **Account**, **Security** and **Logins**, with each two-factor method listed under **Security**. The section you're reading is highlighted. Select an entry to jump to it, or type in the index's search box to narrow both the index and the cards.
- **On a narrow screen or a phone**, select **Show index** on the edge of the page, just under the top bar. The index slides in from the side. It closes when you pick an entry, select outside it, select its close button or press **Esc**.

Long values, such as a long email address, wrap inside their card.

What each security card does is explained in Account Security.

Links that open without signing in

Someone may send you a share link to a list or page. Some of these links open without signing in. A link that has expired, or was mistyped, doesn't open. Ask whoever sent it for a new one.

The admin bar `Since 1.10`

If you build or administer applications, you may see a thin bar above the top bar with a shortcut to the definition of the page, list, report or collection you're looking at. Select **Hide the admin bar** on it to hide it, and **Show admin bar** in

your profile menu to bring it back. Most people never see it. See The admin bar [Build Apps › The Admin Bar].

Troubleshooting

What you see	What to do
The sidebar has disappeared	Select the menu button at the top left (top right in Arabic). If you chose **Overlay** or **Slim**, the sidebar opens only when you need it.
Something you used yesterday is missing from the sidebar	You may be in another space, or acting for a colleague. Check the space list and your profile menu. Otherwise ask your administrator.
No **Services** group	Your organization doesn't use services, or your account is restricted.
Your settings went back to how they were	You used **Apply**, which only lasts for this browser session. Choose again and select **Save**.
Dates or times look wrong	Check **Time Zone** and the date and time formats in the settings panel.

Go deeper

For builders: The admin bar [Build Apps › The Admin Bar] · For integrators: Portal shell: home page, sidebar and share links (API) [Integrate & Extend]

Services & Submitting Requests

This page is for anyone who uses the OSOS portal to ask for something: leave, equipment, IT support, a certificate. It shows you how to find the right service, submit a request, follow it to the end, and fix it if it is sent back to you. If other people's requests come to you for approval, it also shows where to find them.

For the shortest path through submitting and tracking, see the how-to Submit & Track a Request.

How it works

A **service** is a form your organization has published, such as *Leave Request* or *IT Support*. When you fill it in and save it, you create a **request**. The request then follows a route that the service's designer set up: each stage, or **step**, belongs to someone, and that person moves the request on by approving, rejecting or returning it.

Everything about requests lives under **Services** in the sidebar:

Sidebar item	What you find there
Services Catalog	Every service you are allowed to submit.
Outbox	The requests **you** submitted, including drafts and requests sent back to you.
Inbox	Other people's requests that are waiting for **your** action, or that you acted on.
Watching	Requests you follow but don't act on. This item only appears if you have been named as a watcher of a service.

Outbox, **Inbox** and **Watching** each have two tabs. **Ongoing** holds requests that are still moving, and **Completed** holds requests that have finished.

Each list shows a request's **Request ID**, **Service Category**, **Service Name** and **Request Status**. **Watching** also shows **Current Step Name**, **Current Step Owner** and **Step Date**. The lists don't show what was filled in on the request, such as its purpose: open a request to see it.

An example. Sara wants three days of leave. She opens **Services Catalog**, finds *Leave Request*, fills in her dates, saves it and sends it on. The request goes to her manager's **Inbox**. Her manager sees that the end date falls on a public holiday and returns the request with a note. Sara gets an **Action Required** notification, finds the request in her **Outbox** marked **Pending Your Action**, corrects the date and sends it back. Her manager approves it, and it moves to **Completed** in Sara's **Outbox**.

Find a service

1. In the sidebar, open **Services**, then select **Services Catalog**.
2. Type in the search box to find a service by name. Search works in Arabic and English. If the catalog offers filters, such as a category, use them to narrow the list.
3. Select a service to open its page. Read the description and any help attached to it, so you know what you will be asked for.

Why a service may be missing

Each service decides who may submit it. If you don't see a service you expected, it was not published to you:

- It may be limited to particular people or groups, and you are not among them.

- It may be a public form intended only for visitors who are **not** signed in. Signed-in users don't see those.
- It may not be switched on yet, or it may have been archived.

There is no "request access" button. Ask the service owner or your administrator.

Submit a request

1. Open **Services Catalog** and find the service.
2. Select **Apply** on the service's card. The **New Request** form opens. (From the service's own page, which **Details** on the card opens, the same button is **New Request**.) If **Apply** is greyed out, you aren't allowed to submit this service. See Why a service may be missing.
3. Fill in the form. Some fields may already be filled in for you. The form checks your input as you type, so fix anything it marks before you continue.
4. Select **Save**, then confirm with **Save Changes**.
5. Send the request on. Saving creates the request, but it stays with you, marked **Draft**, until you send it. Open the request (many services open it for you after saving; otherwise find it in **Outbox** › **Ongoing**), select the action button for the first step and confirm. The designer of the service names this button, so it might be **Submit**, **Send** or similar.

The request now goes to the first person who has to act on it, and you can follow it in **Outbox** › **Ongoing**. Until you send it, you can still change it: open it and select **Edit Entry**.

Save a draft and finish later

If the service allows drafts, you can keep a form you haven't finished filling in. A draft doesn't create a request yet, and it doesn't show in the request list until you switch to drafts.

1. On the request form, open the menu next to **Save** and select **Save as Draft**.
2. To come back to it, open **Outbox** › **Ongoing**, then switch the list from entries to **Drafts**.
3. Open the draft, complete it and select **Save**.

If you don't see **Save as Draft**, this service doesn't allow drafts.

Submit on behalf of someone else

Some services let you raise a request for another person, for example a manager requesting equipment for a new team member. On those services the form includes a field for the person the request is for. Fill it in and that person is shown as the subject of the request. If you leave it empty, the request is about you.

Submit a public form without signing in

Some services are public: visitors can submit them without an account, for example a citizen filling in a complaint form. Open the link the organization published, fill in the form and save it. Right after you submit, you can open the request you created. That stops once someone in the organization takes it on.

A public form may also check that a real person is submitting it. This check is switched on form by form and is off unless the organization turned it on. You don't have to do anything: there are no pictures to pick and no text to type. Your browser does the check in the background and you only wait a moment. If you are signed in, you are never checked. If the check can't run because its service is temporarily unavailable, the form can't be submitted. Wait a little and try again.

Track your requests

1. In the sidebar, open **Services**, then select **Outbox**. The counter next to it shows how many of your requests are still ongoing.
2. Stay on **Ongoing** to see requests that are still moving, or switch to **Completed** for finished ones.
3. Look at the **Request Status** column to see where each request stands.
4. Select a request to open it and see its details, its history, comments and related emails.

The lists, counters and statuses update by themselves when someone acts on a request. If your connection drops, reload the page, or pull down to refresh on the mobile app.

What each status means

The **Request Status** column describes the request from your point of view:

Status	Meaning
Draft	Saved, but you haven't sent it on from its first step yet.
Pending Your Action	The current step is yours. On a request you already sent, this means it has been returned to you.
On Going	The request is with someone else.
Completed	The request has finished, whatever the outcome. Open it and check its history to see how it ended.
Obsolete	The request can no longer be processed as it is, usually because the service changed after it was submitted.

Change how the list looks

Depending on how the list was set up, you can search it, filter it (including quick filters), sort it, show it as a table, cards, a calendar, a board or a timeline, and save your own queries. See Filtering, Sorting & Search and Switching View Faces.

Export your requests

You can export a request list to Excel or PDF, and where the list offers the quick **Export Entries** action, to CSV as well. See Exporting Data.

Fix a request that was sent back to you

An approver can return your request to you to correct or complete it, for example because a date is wrong or a document is missing. They do this with an action such as **Return**, which moves the request back to your step. Whether an approver has that option depends on how the service was designed.

Your own requests never appear in your **Inbox**, even when they are waiting for you. You handle them from your **Outbox**.

1. Watch for the notification. When the request reaches you, you get an **Action Required** notification under the bell. Your organization may send an email as well.
2. In the sidebar, open **Services** › **Outbox** › **Ongoing**. The request shows **Pending Your Action** in the **Request Status** column.
3. Open the request. Read the approver's note in its history or comments so you know what needs to change.
4. To change the answers, open the actions menu and select **Edit Entry** (on some services the button is named after the request, for example **Edit Leave Request**). Make your corrections and select **Save**.

5. Send the request on with the action button for this step. The designer of the service names these buttons, so the label might be **Resubmit**, **Send** or something similar. If the button asks for a note, explain what you changed.

The request goes back to the person who returned it, and its status changes to **On Going**.

Act on requests waiting for you (Inbox)

If your job includes approving or handling other people's requests, they come to your **Inbox**.

1. In the sidebar, open **Services** › **Inbox**. **Ongoing** lists requests that need you or that you took part in.
2. Open a request and review it.
3. Select the action for your step, such as **Approve**, **Reject** or **Return**. Add a note if asked, and confirm.

Some actions can be run directly from the list. If the request still needs information before the action can run, you are taken to the form to complete it first.

A request you acted on stays in your **Inbox**. When it finishes, it moves to **Completed**, even if you approved it in an earlier part of a longer route.

How actions work, including reassigning a step, taking ownership and adding an approver, is covered in Executing Workflow Actions.

Watch requests

If you are named as a watcher of a service, for example as a department head who follows its requests without approving them, open **Services** › **Watching**. You can open these requests and read them, but you can't act on them. If watchers are added to or removed from a service later, the change applies to its earlier requests as well.

Completed requests

When a request's route ends, it moves from **Ongoing** to **Completed** in every list where it appears: your **Outbox**, the **Inbox** of everyone who took part, and **Watching**. The **Outbox**, **Inbox** and **Watching** items stay in the sidebar while they hold completed requests, even if nothing is ongoing.

There is one exception in the **Inbox**. If a step belonged to a whole group and someone else in the group handled it, the request doesn't appear in your **Completed** tab.

Good to know

- **Acting for a colleague.** If someone delegated their work to you, your **Outbox**, **Inbox** and **Watching** lists show only the services they delegated. See Acting as a delegate.
- **Archived services.** If a service is archived, its requests disappear from **Outbox**, **Inbox** and **Watching**. They come back if the service is restored.
- **Requests with several stages.** The current step and owner shown on a request are always those of the stage that is active right now. This includes a nested route that runs inside the main one.
- **Attachments.** What you can attach to a comment, and how big it can be, is set for each list. The usual limit is about 1 MB. See Comments & Collaboration.

- **Reports on the mobile app.** Reports built on request lists are available on the web only. The mobile app shows them as unavailable.
- **The catalog shows everything at once. Services Catalog** lists all your services on one page, without paging.

Troubleshooting

What you see	What to do
A service you need isn't in **Services Catalog**	It isn't published to you. Ask the service owner or your administrator. See Why a service may be missing.
Your request still shows **Draft** and nobody has acted on it	You saved it but haven't sent it on. Open it and select the action button for its first step, such as **Submit**.
Apply is greyed out, or a service's page has no **New Request**	You can read about the service but you aren't allowed to submit it. Ask the service owner.
Your returned request isn't in your **Inbox**	That's expected. Your own requests are always in **Outbox**, marked **Pending Your Action**.
You can't edit your own request	You can only change a request while the current step is yours. If it's with someone else, add a comment or contact them.
No **Save as Draft** option	This service doesn't allow drafts.
A public form refuses to submit	The background check couldn't run. Wait a little and try again.

Go deeper

For integrators: Requests & services (API and internals) [Integrate & Extend]

Browse a List and Change How It Looks

This page is for anyone who opens a list of records in the OSOS portal: a list of tasks, customers, assets or cases. It shows you how to read the list, switch between the displays it offers (a table, a board, a calendar and so on), and move cards on a Kanban board.

How it works

Everything you open from the sidebar of an application is a **view**: a list of records that the person who built the application set up for you. The view decides which records you can see, which fields are shown, and which buttons you get. Two colleagues can open the same view and see different records, because each of them only sees what they are allowed to.

A view can show the same records in more than one **display**. One display is the default, and it is what you see when you open the view. You can switch to any other display the view offers, and your search, filters and sorting stay as they are.

An example. A support team's *Tickets* view opens as a table. A team lead switches it to **Kanban view** to see the tickets as cards in columns by status, and drags a ticket from *New* to *In progress*. A colleague switches the same view to **Calendar view** to see tickets by due date.

The displays

Display	What you see	Good for
Table view	One row per record, one column per field.	Dense data, comparing records, editing in place, selecting many records.
Badge view	Each record as a compact badge or small card with a title and, if set up, an image.	Scanning a list at a glance.
Calendar view	Records placed on a calendar by a date field, with month, week, day and list layouts.	Anything that happens on a date: bookings, deadlines, visits.
Kanban view	Records as cards in columns, one column per value of a field such as a status.	Work that moves through stages.
Timeline view	Records along a time axis.	Following events in order.
Tree view	Records in a parent and child hierarchy that you expand level by level.	Org charts, category trees, anything nested.

A display only appears if the view offers it and the records suit it. For example, **Calendar view** needs a date field and **Kanban view** needs a field to split the board by. While you are looking at your drafts, **Timeline view** and **Tree view** are not offered.

Switch to another display

1. Open the view from the sidebar.
2. In the bar above the list, select the display menu. It shows the name of the current display, for example **Table view**.

3. Select the display you want.

If there is no display menu, the view offers only one display.

Read the list

- **The list keeps itself up to date.** When someone else adds or changes a record, or acts on its workflow, the change appears in your list without a reload. If your connection drops, reload the page, or pull down to refresh on the mobile app.
- **Refresh** (the circular arrow above the list) reloads the records without reloading the page. It keeps the columns you chose. Use it after an administrator changes your access, for example to see a protected value you have just been allowed to read.
- **A blank cell is not always empty.** At some stages of a workflow a field can be hidden from you. The cell is then completely blank, with no value and no `****`, and you can't edit it from the list. The value is still stored. Open the record once it reaches a stage that shows the field.
- `****` **means protected.** A field you are not allowed to read shows `****` instead of its value. See Protected values in a record.

What you can do from the list beyond reading it is covered on other pages: search, filter, sort and group it, save your own version of it, add and edit records, and export it.

Using each display

Table view

The table shows one row per record across the columns the view gives it. Where the view allows it, you can:

- choose which columns are shown and in what order (see Make a view your own),
- edit a value in place without opening the record (see Edit a value in place),
- add a record from a row at the end of the table,
- select rows, or select every matching record, and act on them all at once (see Change many records at once),
- drag rows into your own order.

What happens when you select a row (open the record, or nothing) is set by the view.

Kanban view

The board shows each record as a card, in a column for each value of the field the board is split by. That field is usually a category such as *Status* or *Priority*. It can also be a field that points at another record or at a list item, so you can have a board by customer, by project or by department.

- **Move a card** by dragging it to another column. This changes that field on the record and saves it. It works on the mobile app too.
- **Cards with no value** sit in a column called **Category not set**. Dropping a card there clears the field. A card whose option was later removed from the field also lands in this column, so it never disappears from the board.
- **Your own drafts** can appear on the board too, so you can see work in progress.
- **A card can show more**: a second title, an image, a date, and who created or last changed the record, depending on how the board was set up.

A card can't move to every column. If a move isn't allowed, the card snaps back and a message tells you why. This happens, for example, when the target column stands for an archived record, or for a value this card's field can't hold. Dropping a card inside its own column only changes its position, and only if the list allows reordering. A category field that holds several values can't split a board, because a card can't sit in two columns.

On the mobile app you can drag cards between columns, but you can't reorder the columns themselves.

Choose which columns you see `Since 1.10`

The person who built the board decides which columns it shows: every possible value, only the values that cards actually use, or a hand-picked set. A board shows at most **20 columns**. If there are more, a notice says how many are hidden, and another display may suit the data better. A column for a record that was deleted stays on the board, marked as deleted, so its cards are still reachable.

If the board allows it, you can pick your own columns:

1. Select **View Settings** (the sliders icon above the board).
2. Under **Columns**, tick the columns you want to see. Each one shows how many cards it holds.
3. To go back to the board's own columns, select **Reset** in that section.

Your choice lasts for your session. It is also dropped if the board itself is changed.

Calendar view

Each record sits on the calendar on the date in its date field, with its title and, if set up, a second title and an image. Switch between month, week, day and list layouts to read your records by when they happen.

Tree view

Records appear as a hierarchy. Expand a record to see the records below it, or expand everything at once. When you filter a tree, it keeps the parents of the matching records visible and marks which records matched and which are only there to show the path, so the hierarchy still makes sense. This works even when you filter by state alone, for example to show only archived records.

Badge view

Each record shows as a compact badge or small card with its title and, if set up, a second title and an image. You can drag badges into your own order where the view allows it. On the mobile app you can choose between a badge layout and a gallery layout.

Timeline view

Records appear in time order along a timeline. Search and the Filter panel are not available in this display.

Mini cards

A view can also have a mini-card layout: small cards with a title, an icon, a date and counters. You see it where the view's records appear in a counter on a page or dashboard, not in the display menu of the list. On the mobile app, if a view offers mini cards as a display, it shows an empty area: choose another display.

Good to know

- **The default display is set by the view.** Each time you open the view, you start on its default display.

- **What you can switch is set by the view.** If a display, a column choice or reordering isn't there, the view was set up without it. Ask the owner of the application.
- **Web and mobile differ in places.** See Web vs. Mobile for what works where.

Go deeper

For builders: Data Views & Faces [Build Apps] explains how each display is set up, including the Kanban column options.

Search, Filter, Sort and Group a List

This page is for anyone who works with lists of records in the OSOS portal. It shows you how to find the records you need: search by words, filter by exact conditions, apply quick filters, sort, group the list with totals, and page through long results. It also has ready-made recipes, such as showing only your own records or only last month's.

How it works

Each list gives you up to five tools, in the bar above it:

Tool	Use it to	Example
Search	Find records by the words in them.	Type *Riyadh* to find every customer with Riyadh anywhere in their details.
Filter	State exact conditions.	*Status* = *Open* and *Amount* > *1000*.
Status menu and quick filters	Apply conditions someone prepared for you, in one click.	*My open tickets*, *Overdue*.
Sort	Put the list in order.	Newest first, or by due date.
Group	Split the list into sections, each with its own totals.	Invoices grouped by customer, with a total per customer.

All of them work together: a search, filters and quick filters narrow the list at the same time, and sorting and grouping apply to whatever is left.

The person who built the view decides which tools you get. If you don't see a search box, a **Filter** button or a sort option, the view was set up without it.

Search the list

1. Type one or more words into the search box above the list.
2. Press **Enter**, or select the search icon.

Search looks through all of a record's searchable fields at once, so you don't pick a field. It finds the labels you see on screen: a category's name, the title of a linked record, a person's name. It finds text in every language your organization uses, whichever language it was typed in.

Tips for what to type:

You type	You get
`invoice paid`	Records that contain **either** word.
`"invoice paid"`	Records that contain that **exact phrase**. Use double quotes.
`invoice -paid`	Records that contain *invoice* but **not** *paid*.

Search matches whole words, and it ignores upper and lower case. It does not match other forms of a word: `run` does not find `running`. A record you have just created or changed can take a moment to appear in search results.

Search inside a picker

When you fill in a field that points at another record or at a person, you pick from a list and can type to narrow it. What you type is matched against the record's title in every language your organization uses, not only your own. With the portal in Arabic you can still find a colleague whose name was entered only in English, and the other way round. The match ignores case and finds your text anywhere in the title.

Filter the list

A filter is one or more **conditions**. Each condition picks a field, a comparison (the **Operator**) and a value.

1. Select the filter icon next to the search box. The **Filter** panel opens.
2. Add a **Condition**:
    1. Under **Field**, pick the field to check. Besides the record's own fields you may see **Entry Metadata** (such as **Created by** and **Created at**), **Current Step** and **Current User**, if the view allows filtering on them.
    2. Under **Operator**, pick a comparison, such as **Equal** or **Contains**.
    3. Under **Source**, choose where the value comes from (see Where the value comes from). Usually this is **Fixed**: you type or pick the value yourself.
    4. Enter or pick the **Value**.
3. To add more conditions, add another **Condition**. At the top of the group, choose **All conditions are met** (every condition must match) or **Some conditions are met** (at least one must match).
4. To mix the two, add a **Group**: a set of conditions inside the filter with its own *all* or *some* choice.
5. Select **Apply**.

The number of active filters shows as a chip in the search box, for example *2 Filters*. Remove the chip to clear them, or open the panel and select **Reset**.

Comparisons you can use

Which comparisons are offered depends on the type of field. The **Operator** list uses the names below; once the filter is set, its summary writes the short form (for example **=**, **!=**, **>=**).

In the Operator list	Short form	Means	Works with
Equal / **Not equal**	**=** / **!=**	Is / is not exactly this value.	Every type of field.
Less than, **Less than or equal**, **Greater than**, **Greater than or equal**	**<**, **<=**, **>**, **>=**	Less than, at most, greater than, at least.	Numbers and dates.
In / **Not in**	**in** / **not In**	Is / is not one of several values.	Categories, linked records, people.
Contains / **Does not contain**	**contains** / **doesn't contain**	Has / doesn't have this text somewhere in it. Ignores case.	Text.
Start with / **Does not start with**	**starts with** / **doesn't start with**	Begins / doesn't begin with this text. Ignores case.	Text.
Like / **Is not like**	**is like** / **isn't like**	Matches / doesn't match a text pattern. Ignores case.	Text.
Is empty / **Is filled**	**is empty** / **is filled**	Has no value / has a value. No value to enter.	Every type of field.
Under	**under**	Sits anywhere below this record in a hierarchy.	Tree-shaped data, such as a category tree.

For a field that holds several values, such as a repeating section, you can first reduce the values to one and then compare it: **Count of values**, **Sum**, **Average**, **Min**, **Max**, **First Value**, **Last Value**, or **Any Value** (the default: a record matches if any one value does). For example, **Count of values Greater than** 3 finds records with more than three rows.

Empty and filled

Is empty matches a field that has no value, including a field that is not on the record at all. **Is filled** matches only a field that is there and holds a real value.

This matters for a field inside a repeating section. A record whose section has no rows counts as **empty** for that field. A condition looks at the field across the whole section, not row by row: if one row leaves the field blank, the section counts as empty, so you can't filter for "at least one row is filled".

Where the value comes from

Source	The value is	Example
Fixed	What you type or pick.	*Status = Open*
Pointer	Something the platform fills in for you at the moment the filter runs.	**@me** (you), **@today**
Field	The value of another field on the same record.	*Delivered on > Promised on*
Expression	The result of a short formula.	Today's date, the start of this month
Parameter	A value you are asked for each time a saved query runs.	A department you pick each time

Expression values `Since 1.10`

An **Expression** is a short formula whose result is compared with the field. It is offered for text, number, date, date-and-time, time, yes/no and linked-record fields. A hint under the box says what the formula must return, for example:

- a **date** field needs a date such as `2026-11-05`, or a formula such as `scope.today()` or `scope.StartOfMonth()`;
- a **number** field needs a number such as `10`, not `'10'`;
- a **linked-record** field needs a record, such as `scope.me()` for you.

If the formula returns the wrong kind of value, the editor shows a warning but still lets you select **Apply**. The filter then matches nothing, so check the warning.

Recipe: show only your own records

1. Open the **Filter** panel and add a **Condition**.
2. Under **Field**, open **Entry Metadata** and pick **Created by**.
3. Under **Operator**, pick **Equal**.
4. Under **Source**, pick **Pointer**, then pick **@me**.
5. Select **Apply**.

To see records assigned to you instead, pick the record's own field that holds the person responsible (for example *Assigned to*) in step 2. If you don't see **Entry Metadata**, the view doesn't allow filtering on who created a record.

Recipe: show only a date range, such as last month

1. Open the **Filter** panel and add a **Condition**.
2. Pick the date field, for example **Entry Metadata** › **Created at**, or a date field of the record such as *Due date*.
3. Choose **>=** and enter the first day of the range, for example 1 October.
4. Add a second **Condition** on the same field: **<** and the day after the range ends, for example 1 November.
5. Keep **All conditions are met** and select **Apply**.

To have the range move forward by itself, use an **Expression** instead of a fixed date: `scope.StartOfMonth('-1M')` for the start of last month and `scope.StartOfMonth()` for the start of this month.

To keep a filter like these and reuse it, save it as a query: see Save a filter so you can reuse it.

Archived, invalid and obsolete records

The **Status** menu next to the search box can also switch between record states, if the view allows it:

- **Active** shows records in normal use. **Archived** shows records that were archived. See Archive and restore records.
- **Valid** shows records that fit the application's current form and workflow. **Invalid** shows the ones that don't, split into **Obsolete** (made with an older version of the form) and **Invalid requirements** (missing something the form now requires).

You can combine states, for example **Archived** together with **Obsolete**.

Protected fields in a filter

- **A protected field you can't read can't be filtered or searched.** It is left out of the **Field** list, and a filter on it is refused, so a hidden value can't be guessed by trying one filter after another.
- **A protected field you have been allowed to read stays in the Field list**, even before you reveal it.
- **An encrypted field can never be filtered, searched or sorted**, by anyone. Search doesn't look inside it either.

See Protected values in a record.

What a view may switch off

A view can switch off parts of filtering. When it does, the option simply isn't offered, and anything you can't use is ignored. A view may switch off:

- search;
- filtering on the record's current or previous workflow steps;
- filtering on when a record was created or changed, or by whom;
- filtering by "me" or "my groups";
- showing archived, obsolete or invalid records.

Quick filters and the Status menu

A view can come with **quick filters**: named filters someone prepared, such as *Overdue* or *My open tickets*. Select one to apply it. If you apply several, a record must match all of them, on top of your search and your own filters. Some quick filters are already on when the list opens.

Where quick filters appear `Since 1.10`

Each quick filter appears in one of two places, as the person who built the view chose:

- **In the Status menu.** Open **Status** and tick the filters you want. Related filters can sit under a heading: tick the heading to apply or clear the whole group. A partly ticked heading means only some of its filters are on.
- **As a toggle in the bar**, just before **Status**. A group of toggles appears as a drop-down. Toggles that don't fit wrap onto a row below.

Quick filters appear in the order they were arranged. On the mobile app they appear in the Status sheet or as chips next to the Status chip, in the same order. A long name shows in full when you hover over it.

Quick filters that ask for a value `Since 1.10`

Some quick filters and saved queries ask for a value each time, such as a department or a date range. When you apply one, a **Query Parameters** dialog asks for each value, and the list then runs with them.

- Each quick filter keeps its own values, even when two of them ask for a value with the same name.
- After you apply one, the **Filter** panel shows its conditions with your values filled in. You can edit them there. Saving the result creates a new query and leaves the original as it was.
- A quick filter that asks for a value is never on by default.

Filter from a column `Since 1.10`

In a table, a column's own filter and the **Filter** panel share the same conditions. A condition you set in either place shows up, and is saved, in the other.

- A column filter shows only simple *all of these* conditions. For a field with several conditions it shows the last one.
- Applying a column filter adds to what is there. It never replaces another condition on the same field, so a range you built in the **Filter** panel is kept. **Reset** in the column filter removes only the condition it shows.
- If your filter uses *some conditions are met* or has a group inside it, the column filter first asks whether to clear it or keep it as a group.

Sort the list

1. Select **View Settings** (the sliders icon above the list).
2. Under **Sort**, pick a field under **Sort By** and a **Direction**.
3. To sort by more than one field, add another field. Sorting follows the order shown: the first field decides, and the next one breaks ties.

In a table you can also select the sort icon in a column header to switch that column between ascending and descending.

Ascending order puts numbers first, then Latin letters A to Z, then Arabic letters, and dates from oldest to newest. Descending reverses it. Records that tie keep a stable order, so they don't jump between pages.

If you don't choose a sort, or the view doesn't let you, the view's own sorting applies. A new list is usually sorted with the most recently changed records first. If you remove every sort field, the list stays unsorted for the rest of your session.

Group the list and see totals `Since 1.10`

In a table, the list can be split into groups, for example invoices by customer, with totals for each group. The person who built the view may have set up a grouping and the totals already. If the view allows it, you can choose your own.

Choose your own grouping

1. Select **View Settings** (the sliders icon above the list).
2. Under **Grouping**, select **Add Group** and pick a field under **Group by**.

3. To group inside the groups, add another field. Drag the fields to reorder them: the first field makes the outer groups.
4. To go back to a flat list, select **Reset** in the **Grouping** section.

Changing the grouping takes you back to the first page of the list.

Your own grouping lasts for your session. It survives a page reload and moving around the app. When you open the view again later, in a new tab, the next day or after signing in again, you get the view's own grouping. If the view's grouping is changed while yours is active, yours is dropped.

Only fields shown in the table can be chosen, and some fields can't split a list into clear groups, so the picker leaves them out:

- fields that hold several values at once;
- fields that repeat, and any field inside a repeating section;
- encrypted fields.

A field that links to one other record, a field inside a section that doesn't repeat, and a protected (sensitive) field can all be chosen.

Read a grouped list

- Each group starts with a header row. Select the arrow to fold the group away.
- Each group has a **subtotal** row with one figure per total. Folding a group hides its records but keeps its subtotal on screen.
- A **grand total** row at the bottom adds up every record your filters match, not just the page you are looking at. When there is only one group, the grand total is left out, because it would repeat that group's subtotal.
- **Add Entry** appears below every group, even when all groups are folded.

On the mobile app, grouped lists hide the grand-total row, and a folded group hides its subtotal. See Grouping and totals on mobile.

When a total is blank or masked

You see	It means
`-`	There was nothing to total: no matching records, or none had a value. A real total of zero shows as `0`.
`****`	The total was worked out but is hidden from you, because it is over a field you are not allowed to read.

A total over an encrypted field isn't offered at all.

Grouping by a protected field gives one group. If you group by a sensitive or encrypted field, every matching record goes into a single group labelled `****`, with the count and subtotals for all of them. Records with no value in that field land in the same group. This is the same for everyone, including people allowed to read the field, so the grouping can't reveal anything.

Lists that ask for a filter first

Some lists are **filter-first**: they show nothing until you fill in one or more filter fields, so you don't load a huge list by accident.

1. Fill in the fields the list asks for.

2. Search.

The panel then folds into a short bar above the results that shows what you searched for. Select it to change your search. When you come back to the list, for example from a record, your results and the short bar are still there.

Page through a long list `Since 1.10`

Every paged list has the same bar at the bottom:

- the range you are looking at, such as *21–40 of 137 items*;
- buttons for the first, previous, next and last page;
- a *page X of Y* indicator: select it, type a page number and confirm to jump straight there;
- a page-size menu with **20**, **50** or **100** items per page. The default is 20, and refreshing the browser returns to it.

The bar is hidden when everything fits on one page. If the page you were on stops existing, for example because you deleted its last record, the list moves you to the new last page.

On the mobile app

In the mobile app's table, tap the ⋮ icon right after a column's name to open that column's options: **Filter**, **Aggregator**, **Sort** and **Group**. Each section appears only when it applies to that field. For example, **Group** appears only if the view lets you group and the field can be grouped, and a field you are not allowed to read never offers **Filter** or **Aggregator**. Your changes wait until you tap **Apply**, so you can set several at once.

Troubleshooting

What you see	What to do
A record you just created doesn't show in search.	Wait a moment and search again. New and changed records take a short time to reach search.
The search box is greyed out.	The view has search switched off, or you are looking at your drafts. Use the **Filter** panel instead.
The filter matches nothing, but you expected results.	Check the warning under any **Expression** value, and check **All conditions are met** versus **Some conditions are met**.
A field you want isn't in the **Field** list.	It may be protected and you can't read it, or the view doesn't allow filtering on it.
You can't group by a field.	It holds several values, repeats, is encrypted, or isn't shown in the table.

ⓘ Go deeper

For builders: Queries [Build Apps › Queries & filters] (operators, parameters, saved and quick queries) · Data Views & Faces [Build Apps] (which search, filter and sort options a view offers) · Entity Aggregates & Entry Grouping [Build Apps › Totals & grouping]. For integrators: Records and lists: behaviour reference [Integrate & Extend › Records and Lists: Behaviour Reference].

Make a View Your Own

This page is for anyone who opens the same list in the OSOS portal again and again. It shows you how to save a filter so you can reuse it in one click, how to choose the columns and styles you see, and which of these choices the portal keeps for you.

How it works

The person who built a view decides what it can show. Within those limits, you can tailor it to the way you work. Some of your choices are **kept** until you change them. Others last only for your **session**: they survive a page reload and moving around the app, but are gone when you open the view in a new tab, the next day, or after signing in again.

Your choice	Kept or session only	How
A filter saved as a query	**Kept**	Save a filter
Your own lists of records	**Kept**	Lists
Which table columns are shown	Session only	Choose your columns
Sort order	Session only	Sort the list
Grouping	Session only	Group the list
Kanban columns	Session only	Choose which columns you see
Styles	Session only	Apply styles

An example. Every Monday, Omar reviews overdue invoices over 10,000 for his region. He builds that filter once and saves it as *My overdue invoices*. Each Monday he opens it from the sidebar instead of building the filter again. He also hides the columns he doesn't need, which lasts until he closes the tab.

If an option on this page isn't there, the view was set up without it.

Save a filter so you can reuse it

A filter you save is called a **query**. It keeps your conditions, not the records, so each time you open it you see the records that match today.

1. Build your filter in the **Filter** panel. See Filter the list.
2. In the **Filter** panel, select **Save Query**.
3. In the **New Query** dialog, give the query a name, then save.

The query is saved for you, under this view. To use it again, open it from the sidebar, where your saved queries appear under the view's name.

To change a saved query, open it, change its conditions in the **Filter** panel and select **Save Query** again: this updates the query you opened.

Queries that ask for a value

If one of your conditions uses **Parameter** as its source, the query asks for that value each time it runs, for example a region or a date range. This lets one query serve many cases. See Quick filters that ask for a value.

When you can’t save

- **There is no Save Query button.** The view doesn’t allow saved queries, you are looking at your drafts, or you are not signed in.
- **The name is refused.** A query with that name already exists for this list. Choose another name.

Choose your columns

In **Table view**, if the view allows it:

1. Select **Columns Shown** above the table.
2. Tick the columns you want and clear the ones you don’t. Type in the box to find a column by name.

Where the table allows it, you can also drag columns into a different order. Your choice lasts for your session, and **Refresh** keeps it.

Apply styles

A view can colour its records by their tags, for example a red border on urgent records. If the view lets you choose:

1. Select **View Settings** (the sliders icon above the list).
2. Under **Style**, switch on the styles you want.
3. To go back to the view’s own styles, select **Reset** in that section.

Your other options

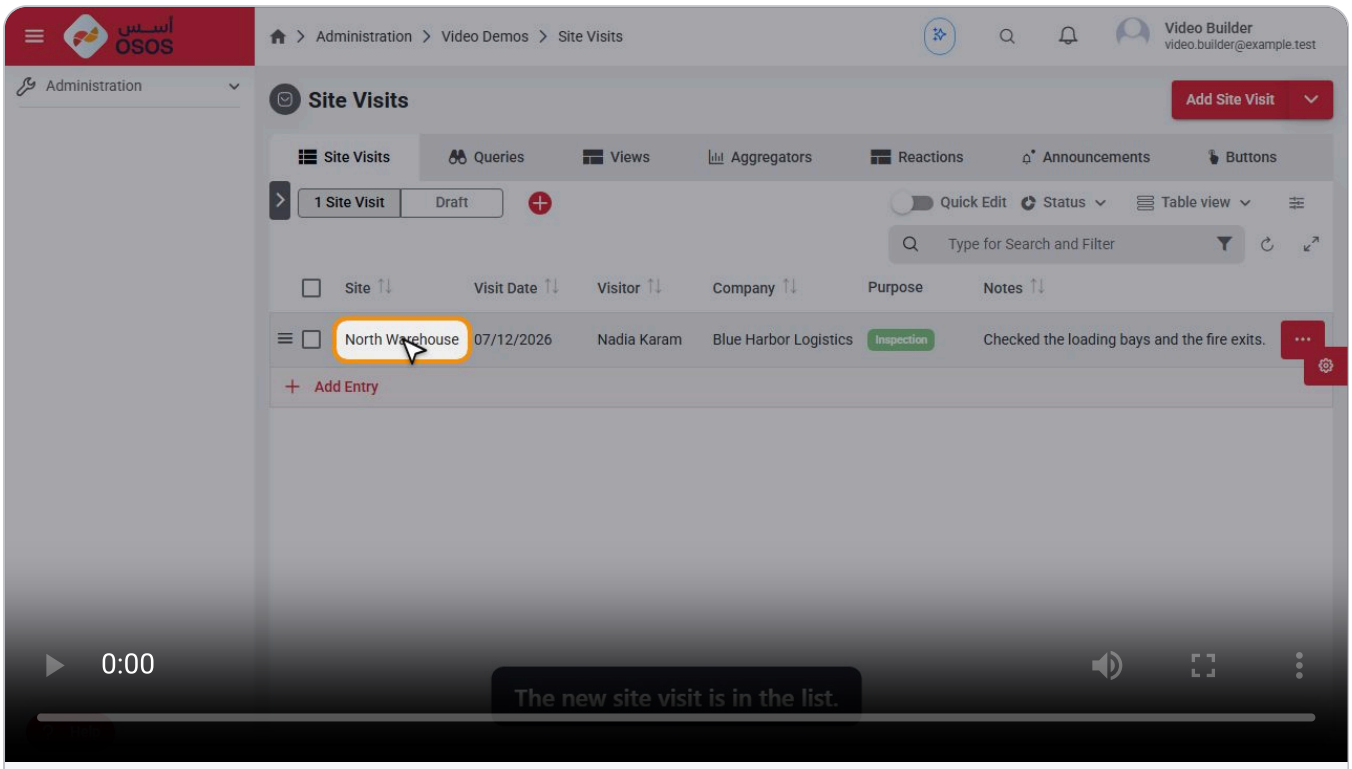
These are covered on the pages that own them:

- **Quick filters** someone prepared for you: Quick filters and the Status menu.
- **A different display**, such as a board or a calendar: Browse a List and Change How It Looks.
- **Your own sets of records**, kept by hand rather than by a filter: Lists.

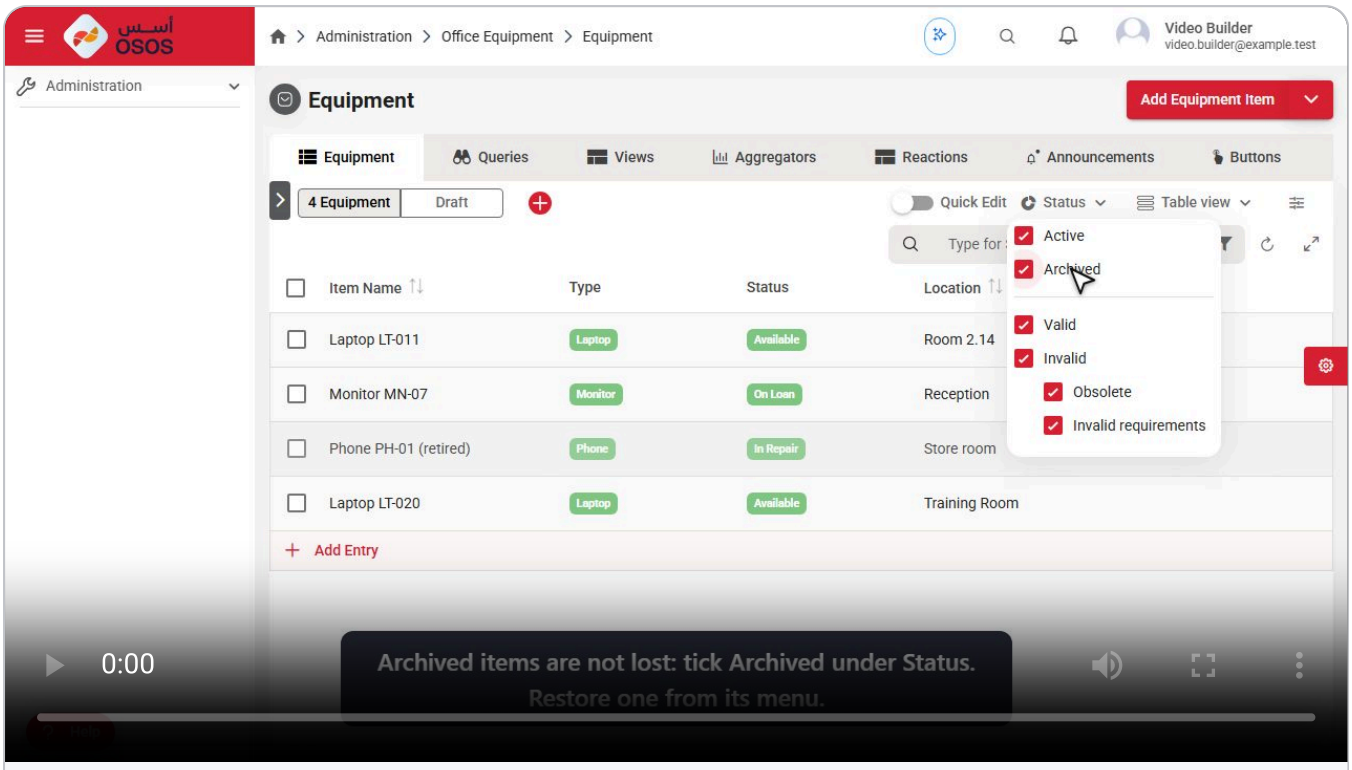
> ### Go deeper
>
> For builders: Queries [Build Apps › Queries & filters] (saving, sharing and tagging queries in Administration) · Data Views & Faces [Build Apps] (which of these options a view offers).

Create and Edit Records

This page is for anyone who adds or updates information in the OSOS portal: a new customer, a site visit, an asset, a case. It shows you how to add a record, keep an unfinished one as a draft, edit records one at a time or many at once, and work with fields whose values are protected.



HOW-TO **Add a record** Fill in the form and save · 0:36 · Recorded on OSOS 1.11.0-alpha.1



HOW-TO A record from draft to archive

Draft, save, archive, restore, export · 0:58 · Recorded on OSOS 1.11.0-alpha.1

To read a record and use its tabs (history, comments, emails), see The Record Page. To submit a request for approval, see Services & Submitting Requests.

How it works

Information in OSOS is kept as **records**, also called **entries**. You always reach records through a **view**: a list that the person who built the application set up. The view decides which records you see, which fields its forms show, and whether you may add, edit or archive records at all. If a button on this page isn't there for you, the view doesn't offer it.

A record moves through a few states:

State	What it means
Draft	You started it but haven't saved it as a real record yet. Only you can see it.
Active	A normal record. People with access can see and use it.
Obsolete	The form it was made with has changed so much that the record no longer fits. It is hidden from normal lists until it is upgraded.
Archived	Taken out of use but kept. It can be restored. See Archive and restore records.

An example. Huda logs a site visit. She opens the *Site Visits* view, selects **Add Entry**, and fills in the date and the site. She is called away before adding her notes, so she saves the form as a draft. The next morning she opens her drafts, adds the notes and saves it. It is now an active record that her manager can see.

Add a record

1. Open the view from the sidebar.

2. Select **Add Entry**. The button may name the kind of record instead, for example **Add Site Visit**.
3. Fill in the form. Required fields are marked, and some fields may already be filled in for you. Fix anything the form marks before you continue.
4. Select **Save**.

If **Add Entry** isn't there, the view doesn't let you add records. A request for a service is added through the service instead: see Submit a request.

While you fill in the form:

- **Fields that must be unique** are checked when you save. If the value is already taken, change it.
- **A Yes/No field** opens ticked if its default is *Yes*, and empty if it has no default.
- **Fields filled in for you** update straight away. When picking a record fills in other fields, any "Required" warning on those fields clears as soon as the value arrives, along with the error badges on the form's tabs.
- **Repeating sections** can be put in order where the form allows it: drag a row by its handle. The handle appears once there is more than one row. This works on the web and in the mobile app.

Add or change a category option while you fill in a record `Since 1.10`

If the form allows it, a category field lets you **add a new option** or **edit an existing one** (its name in each language, and its colour) without leaving the form. The option is saved together with the record. If someone else changed the options in the meantime, the save is refused with a message: reload the page and try again.

A category field can also allow **several values**, so you pick more than one option for the same record. This works in the mobile app too.

Paste formatted text `Since 1.10`

In a text editor that works in markdown, pasting text that is written in markdown (headings, lists, quotes, tables, code, bold text, links) turns it into formatted content. You can undo it in one step. Pasting an image or ordinary text works as usual.

Attached files are kept only when you save `Since 1.10`

A file you upload while filling in a form, such as a file or image field or a comment attachment, is only kept once you save. If you upload a file and never save, it is not kept. You may see:

Message	What to do
A file you attached has expired or is no longer available. Please upload it again.	The form was open too long. Upload the file again, then save.
File storage is temporarily unavailable. Please try saving again.	Save again in a moment.

Save an unfinished record as a draft

If the view allows drafts:

1. On the form, select the arrow next to **Save**, then select **Save as Draft**. At least one field must have a value. Nothing else is checked yet.
2. To come back to it, open the view and use the switch above the list. It reads the number of records and their name, for example **12 Tasks**, next to **Draft**: select **Draft**.
3. Open the draft, finish it and select **Save**.

Drafts are visible only to you. You can edit and re-save a draft, or delete it. Once you save it as a real record, the draft is removed and the record is checked like any other: every required field must be filled in. A draft has no effect on anything else until then: it can't be picked in other records, and no automation runs for it. Your drafts can also appear on a Kanban board.

Add a record without leaving the table

In **Table view**, where the view allows adding records, a row for a new record appears in the table. Enter the first value and confirm. If the record needs more fields, open the full form from there.

Add a record together with related records

Some forms let you add rows to a related list while you fill in the main record, for example the items of an order. Saving the form creates the main record and all its related rows in one go.

When your organization's record limit is reached `Since 1.10`

Your organization's plan can limit how many records it holds. Once the limit is passed by 10%, new records are refused, unless the plan allows going over it. You can still open, edit and export records. Freeing room or changing the plan is your administrator's decision, so ask them.

Edit a record

1. Open the record.
2. Select **Edit**.
3. Change the fields, then select **Save**.

The same checks apply as when you add a record: required fields, unique values, and the rules of the record's current workflow step.

Good to know:

- **Some fields are locked.** A field can be read-only, for example on a record that combines figures from other records.
- **Once a workflow is complete**, the person who owned its last step can still edit the record from **Edit**. Editing values in place in the list is switched off for every field of that record.
- **Repeating sections keep what you can't see.** If the form lets you edit only some columns of a repeating section, the other columns are kept when you save, row by row. Deleting or reordering rows is safe: hidden values stay with their row. A row you add starts with those other columns empty.
- **The buttons stay on screen.** A view can hide its page title, but **Save**, **Save as Draft**, **Archive**, **Edit** and the workflow buttons are always shown.
- **Upgrading a record.** If the application's form has changed, a record can be upgraded to the new version. Upgrading can send its workflow back to the start.
- **Workflow actions**, such as moving the record to the next step or taking ownership of it, are covered in Executing Workflow Actions.

Technical details

Repeating-section rows are recognised by a hidden id of their own from release 1.10.1; the upgrade to 1.10.1 gives one to every row saved before it. On the 1.4, 1.6 and 1.8 lines rows have no id, and a row is

recognised by its unchanged values instead, so on those lines deleting or reordering rows above a row can move hidden values.

Edit a value in place

You can often change one value without opening the form. Select the value in the list or on the record page and change it there. On the web, press **Enter** or select outside the field to save, **Esc** to cancel, or **Ctrl + S** to save.

A value can't be edited in place when the field is locked, when the view or the workflow step doesn't allow it, or when the record's workflow is complete.

When someone else saved the record first `Since 1.10`

Your organization may have turned on a check for changes made by someone else while you were editing. If it has:

- **While you are editing**, if someone else saves the same record, a notice on the form says "*This entry has changed since you opened it. Reload to get the latest version.*" **Save** is disabled until you select **Reload**. If you have unsaved changes, you are asked to confirm before they are discarded.
- **When you save**, if someone else saved in the meantime, a dialog headed **This record has changed** offers one action, **Reload**. Reload, then make your change again on top of their version.

If the check is not turned on, the last person to save wins.

Change many records at once

1. In the list, tick the records you want. To act on every record that matches your current search and filters, including those on other pages, use the option to select all of them.
2. Open the actions menu for the selection.
3. Choose an action:

Action	What it does
Bulk Edit	Set one or more fields to a value on every selected record. You add a rule for each field to change.
Archive Records	Archive every selected record. See Archive and restore records.
Add to List / **Create New List**	Add the records to one of your lists. See Lists.

The menu only offers what the view allows, and the action may use the name of the records, for example **Archive Visits**. If nothing is selected, nothing happens. Large selections run in the background and report which records succeeded and which failed.

Protected values in a record

Some fields hold confidential values, such as an identity number, a salary or a bank account. Your organization can protect such fields in two ways:

- A **sensitive** field shows `****` instead of its value to anyone who hasn't been allowed to read it. People who have been allowed to read it still confirm who they are before the values appear.
- An **encrypted** field is stored encrypted. Everyone sees `****`, and the value is revealed one field at a time, after an identity check.

The `****` follows the value everywhere: on the record page, in every list, in the record's history and in exports. A field you can't read always looks protected, never blank, so you can tell it apart from a field that is simply empty. Your administrator decides who may read which fields.

See a protected value

- **Sensitive fields:** select the eye icon next to the `****` (its tooltip says **Unmask**), or select **Unmask** in your profile menu at the top of the page. Choose how long the values should stay visible and confirm who you are with a code. Every sensitive value you are allowed to read then stays visible for that time, or until you select **Disable unmask** in the same menu.
- **Encrypted fields:** select the eye icon next to the `****` and confirm who you are. The value is shown until you leave the field or reload the page. Each reveal is recorded. Where you see a lock instead of an eye, you are not allowed to read the field.

The steps, the verification methods and the messages you may see are explained in Account Security and Revealing an encrypted field.

A revealed text field that holds a value per language shows the value in your language. A revealed map field shows at full width.

Change a protected value

You can replace a protected value without seeing it:

- **In the form:** select the `****` in the field. The field empties, and what you type becomes the new value when you save. Once you have selected it, you can't get the old value back in that form: leave without saving if you change your mind.
- **In place:** in the list or on the record page, select the `****` itself (not the eye icon) to edit the value in place. It starts empty. This works on the web and in the mobile app.

If you leave a protected field alone, saving the record keeps its value. Editing another field never overwrites a value you can't read. An encrypted field always opens empty, even for someone allowed to read it.

Filter, sort and total on protected fields

You can't filter or search on a sensitive field you aren't allowed to read, and nobody can filter, search or sort on an encrypted field. Totals over a protected field show `****`. See Protected fields in a filter and When a total is blank or masked.

Why you can't see or change something

- **The view hides it.** A view can leave out records, fields and buttons. A view that doesn't show archived or invalid records won't open them even from a direct link: you see a message that the record isn't available through this view.
- **You aren't allowed to read the linked records.** A picker for people or for another application's records can come back empty if you aren't allowed to read those records. Being able to see that a record links to another doesn't let you read the other one.
- **Pickers only offer records in use.** Archived and obsolete records are never offered.
- **Requests have their own rules.** You can only open a request you are part of, for example as the person who submitted it, its current owner or a watcher.

- **The record lives somewhere else.** Some lists show records that are kept in another application. Whether you can add, edit or archive them there depends on how that list was set up, and some actions, such as adding many records at once, are never available through it.

Ask the owner of the application, or your administrator, if you need access.

Looking for something else?

These topics moved to the page that covers them:

- Reading a list, live updates and the displays: Browse a List and Change How It Looks
- Kanban columns and moving cards: Kanban view
- Grouping and totals: Group the list and see totals
- Filtering on protected fields: Protected fields in a filter
- The record page, its tabs, links, QR code and buttons: The Record Page
- Export and print: Export a List
- Archive, restore and permanent delete: Archive and Restore Records

Go deeper

For builders: Data Views & Faces [Build Apps] (what a view lets people do) · Sensitive Fields [Build Apps › Protect a field] · Virtual Entities [Build Apps › Virtual entities] (lists that show records kept elsewhere). For integrators: Writing Data [Integrate & Extend] · Records and lists: behaviour reference [Integrate & Extend › Records and Lists: Behaviour Reference].

The Record Page

This page is for anyone who opens a record in the OSOS portal to read it or act on it. It shows you what is on the record page, how to move from one record to the next, and where to find a record's history, workflow, discussion and emails.

To add or change records, see Create and Edit Records.

How it works

Select a record in a list to open its page. The page has three parts:

- **The header** at the top, with the record's title and its buttons: **Edit**, workflow buttons such as **Approve**, and a menu with more actions.
- **The fields**, in two columns: each field's name and its value.
- **The side panel**, with tabs for the record's information, workflow, discussion, history and emails.

The view you opened the record from decides which fields, buttons and tabs appear. Two people can open the same record and see different things.

An example. Faisal opens a *Maintenance Job* record from his list. He reads the fields, opens **History** to see who changed the priority yesterday, adds a comment in **Discussion** to ask a question, and then selects the next arrow in the top bar to move to the next job in his list without going back.

Move between records

When you open a record from a list, the top bar shows your position in that list, for example `< 01/30 >`. Select the arrows to open the previous or next record without going back to the list.

The buttons in the header

What you see depends on the view and on the record's workflow:

- **Edit** opens the record's form. See Edit a record.
- **Workflow buttons**, such as **Approve** or **Return**, move the record through its workflow. **Take Ownership** lets you take a step that is waiting for any member of a group. See Executing Workflow Actions.
- **The actions menu**, next to the main button, holds the rest: **Archive**, **Join** for a call about the record (see below), and any buttons the application adds, such as *Print* or *Send reminder*.
- **An archived record** can't be restored from a view. Administrators restore or permanently delete it from Administration. See Archive and Restore Records.

Buttons that start a job

Some buttons start work in the background, such as generating a document. The button waits until that work has finished, or failed, before it shows a success message, moves you to another page or stops its loading indicator. On a public page, a visitor who isn't signed in sees the value such a button saved appear on the record straight away.

The side panel

Each tab appears only if the view turns it on.

Information

Entry information shows when the record was **Created** and by whom (**Created by**), and when it was **Last updated** and by whom (**Last updated by**). Under **Attachments** you find every file attached to the record, split into files in its **Fields** and files attached to its **Discussions**.

WorkFlow

Shows every step of the record's workflow and highlights the current one. Completed steps are green and upcoming steps are grey. Select a completed step to see its details.

Discussion

The record's comments. Add a comment, mention a colleague with `@` and their name, and attach a file. See Comments & Collaboration.

History

A timeline of everything that happened to the record: when it was created, every change with the values entered, workflow actions, archiving, notifications that were sent, and overdue deadlines. Each event shows who did it. Protected values show as `****` in the history too.

When an event involved a person chosen from another field, for example *Assigned to* taken from *Updated by*, the event's details show that information.

E-Mail

Every email sent about the record, newest first, with its subject, date and recipients. Select **Expand** to read a message in full: its **To**, **CC** and **BCC** recipients, subject, body, date, and which automation sent it.

Other panels

- **Warnings**: messages the platform attached to the record, for example when something about it needs your attention.
- **Relations**: if other records belong to this one, such as the items of an order, a tab lists them.

What you see in the fields

Links to records, web pages and email addresses `Since 1.10`

A field that points at another record, a web address and an email address all look the same: a small link icon followed by underlined text. Select the text to open the linked record. If you can edit the field in place, selecting the text opens the editor instead, and the link icon still takes you to the target.

Protected values

A field you are not allowed to read shows `****`. To reveal or change a protected value, see Protected values in a record.

The record's QR code `Since 1.10`

If the view turns it on, the record's header carries a QR code. Scan it with another device, such as your phone, to open the same record there. The code always points at the record itself, even if you reached the page through a bookmark or a shortened link.

Call about a record

On the web, a record can have its own audio and video call, so the people working on it can talk it through without leaving it. Everyone who joins from the same record joins the same call.

1. Open the record's actions menu and select **Join**.
2. Confirm, then turn on your camera and microphone if you want to. You can also share your screen.

The call is not available in the mobile app. Each person still edits the record on their own, through **Edit**.

Good to know

- **A tab or button is missing.** The view doesn't turn it on, or the record's workflow doesn't allow it at this step. Ask the owner of the application.
- **Opening a record from a link fails.** If the view doesn't show archived, invalid or obsolete records, it won't open them from a direct link either. See Why you can't see or change something.

Looking for something else? Displays and list controls are on Browse a List and Change How It Looks. Adding records, drafts and editing values in place are on Create and Edit Records. Export and print are on Export a List.

> ⓘ **Go deeper**
>
> For builders: Data Views & Faces [Integrate & Extend › Data views API reference] (which tabs and buttons a record page shows) · Buttons [Build Apps].

Lists: Keep Records Together

This page is for anyone who keeps coming back to the same set of records in the OSOS portal: the customers you are following up, the assets due for an inspection, the candidates on a shortlist. It shows you how to gather records into a **list** of your own, open it again in one click, and share it with colleagues.

How it works

A **list** is a named set of records that you pick by hand. It is like a playlist for your data: you add the records you care about once, give the list a name, and open it whenever you need that set.

A list is different from a saved filter:

	A list	**A saved filter (query)**
What it holds	Exactly the records you added.	Whatever records match its conditions today.
How it changes	Only when you add or remove records.	By itself, as records change.
Best for	A hand-picked set: a shortlist, a follow-up set.	A rule: *overdue invoices*, *my open tickets*.

For saved filters, see Save a filter so you can reuse it.

Each list belongs to one view and holds records of one kind only. A record can be in several lists at once, and adding it to a list never changes the record itself. Your lists, and the lists other people shared with you, appear in the sidebar under the view they belong to.

An example. Noura, a recruiter, filters the *Candidates* view for applicants with five years' experience. She ticks the eight she wants to interview and creates a list called *Interview shortlist*. She shares it with the hiring manager, who finds it in the sidebar under *Candidates* and opens it the next morning.

You can only create lists in a view that allows them. If you don't see **Create New List** or **Add to List** in the view's selection menu, the view doesn't.

Create a list

1. Open the view, and tick the records you want in the list. To include every record that matches your search and filters, select all of them.
2. Open the actions menu for the selection and select **Create New List**.
3. In the **Create new list** dialog, enter a **Name**. Optionally choose an **Icon** and add a **Description**. The name and description can be entered in each language your organization uses.
4. Select **Save**.

The new list holds the records you selected, and it appears in the sidebar under the view. The name must be unique among your lists: if it's taken, the dialog says so and asks for a new one.

Add records to a list

1. In the view, tick the records you want to add, or select all matching records.
2. Open the actions menu for the selection and select **Add to List**.

3. Under **Choose List**, pick the list, then select **Save**.

A record that is already in the list isn't added twice. The message tells you how many records were added and how many were already there.

Open a list and work with its records

1. In the sidebar, open the view the list belongs to.
2. Select the list under the view's name.

The list opens like any other list of records. You can search, filter, sort and group it, open or edit a record, select records and act on them, and drag records into your own order. The view's own rules still apply: if the view hides archived records, they are hidden in the list too.

Remove records from a list

1. Open the list and tick the records to remove.
2. Select **Remove from list** and confirm.

The records leave the list. The records themselves are not deleted.

Manage a list

Open the list, then open the menu in its header:

Action	What it does	Who can do it
Edit	Change the list's name, icon or description. The button may show the list's name.	The list's owner.
Export list	Download the list's records as an Excel file.	Anyone who can open the list.
Share list	Share the list with colleagues or groups.	The owner, and anyone the list allows to re-share it.
Duplicate list	Make your own copy under a new name.	Anyone who can open the list.
Delete list	Delete the list. Its records are not deleted.	The list's owner.

Share a list

1. Open the list and select **Share list**.
2. Choose the people or groups to share it with, and save.

The people you shared with find the list in the sidebar under the same view. You can only share with people who can already open that view. A list in a view that anyone can open without signing in can't be shared.

Duplicate a list

1. Open the list and select **Duplicate list**.
2. Enter a name for the copy, and optionally a new icon and description, then save.

The copy is yours. It is not shared with anyone, even if the original was, and it remembers which list it was copied from.

Good to know

- **Someone else changed the list at the same time.** If two people save changes to the same list at once, the second save is refused instead of overwriting the first. Reload the list and try again.
- **On the mobile app** you can open lists and add records to them. Creating, duplicating and sharing lists are web-only. When you add or remove a record on mobile, the list updates straight away.
- **Long lists** use the same paging bar as other lists. See Page through a long list.
- **Lists that feed fields and boards.** Builders also make lists in Administration, for example the choices offered in a field, or the columns of a Kanban board. You see those as options when you fill in a record, not as your own lists. A Kanban board can be split by such a list, with one column per item: see Kanban view.

Go deeper

For builders: Lists in Administration [Build Apps] (value lists, record lists and hierarchies). For integrators: Records and lists: behaviour reference [Integrate & Extend › Records and Lists: Behaviour Reference].

Create a List

This page points you to the right place to create a list in OSOS. There are two kinds, for two different jobs.

Your own list of records

To keep a hand-picked set of records together, such as a shortlist or a set of records to follow up, tick the records in a view and select **Create New List** from the selection's actions menu. Step by step, with adding records later, sharing, duplicating and deleting a list: Lists: Keep Records Together.

A list of values for fields and boards

Lists of values, such as the choices offered in a field or a category tree, are set up by builders in **Administration › Lists**. If that is what you need, see Lists in Administration [Build Apps]. If you don't have access to Administration, ask the owner of the application.

Archive and Restore Records

This page is for anyone who removes records from everyday use in the OSOS portal. It shows you how to archive one record or many, how to see archived records again, and who can bring them back or delete them for good.

How it works

Archiving is the everyday way to remove a record. An archived record drops out of the normal list but is not lost: it is kept, and it can be restored. **Permanent deletion** removes a record for good. It is a separate action that administrators take, and it can't be undone.

	Archive	**Permanently delete**
Who	Anyone the view allows to archive.	Administrators, in Administration.
Can it be undone?	Yes: the record can be restored.	No.
Where	In the view, on the record or on a selection.	On the archived record's page in Administration.

An example. A sales team closes a deal and archives the *Opportunity* record, so it no longer clutters the pipeline. Six months later the customer comes back. A team member switches the list to **Archived**, finds the old record, and asks an administrator to restore it.

Archive a record

1. Open the record.
2. Open the actions menu in the record's header and select **Archive**.
3. Confirm.

The record leaves the active list. If **Archive** isn't there, the view doesn't let you archive records.

Archive many records at once

1. In the list, tick the records you want to archive. To archive every record that matches your search and filters, including those on other pages, select all of them.
2. Open the actions menu for the selection and select **Archive Records**. The button may use the name of the records instead, for example **Archive Opportunities**.
3. Confirm.

If no record is selected, nothing happens.

See archived records

1. Open the view.
2. Open the **Status** menu next to the search box.
3. Select **Archived**. To go back, select **Active**.

If **Archived** isn't in the menu, the view doesn't show archived records. Such a view won't open an archived record even from a direct link: you see a message that the record isn't available through this view.

Restore a record

Restoring brings an archived record back into normal use. In the portal's views there is no restore button: restoring is an administrator action, taken on the record's page in Administration with **Restore Archived Records**. Ask your administrator, and tell them which record you need, for example by sending them its link.

Permanent deletion

An administrator can permanently delete an archived record from its page in Administration with **Permanently Delete Records**. A record can't be deleted while other records still point at it. The delete dialog lists those records and only allows the deletion once there are none: the links must be removed or changed first.

Prefer archiving for anything you might need again.

Good to know

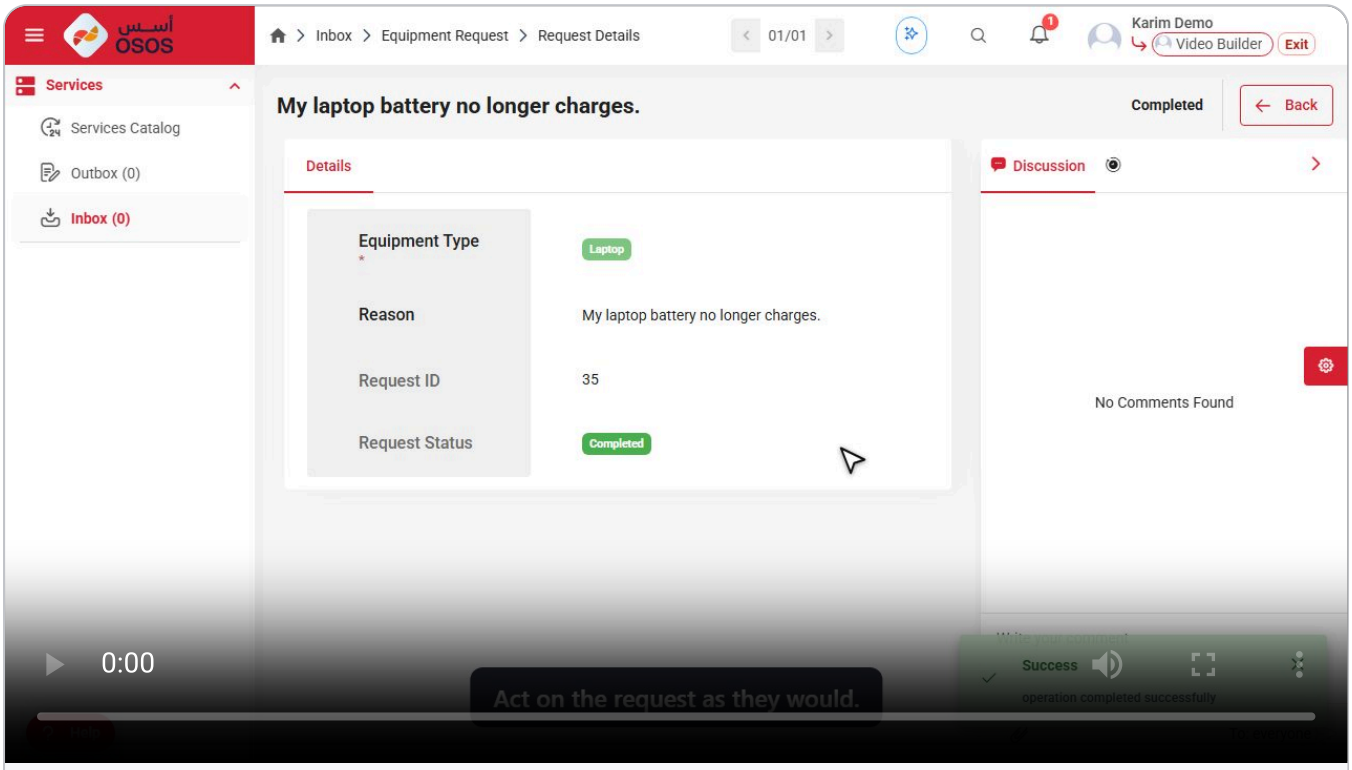
- **Someone archived it first.** If someone else archives the same record just before you, your archive is refused with a message that it is already archived. Refresh the list to see the record's current state.
- **Archiving can happen automatically.** An application can archive records by itself when certain conditions are met.
- **Archived records count less.** If your organization's plan limits how many records it holds, archiving records frees room. See When your organization's record limit is reached.

Go deeper

For builders: Data Modeling: Entities [Build Apps › Create and design an entity] (archive and permanent delete in Administration) · Data Views & Faces [Integrate & Extend › Data views API reference] (whether a view shows archived records).

Acting on Workflow Steps

This page is for anyone whose job includes approving, reviewing or handling requests and records that move through a route, such as a manager approving leave or a finance clerk checking an expense claim. It shows you how to act on a step that is waiting for you, claim a step that was offered to your team, hand a step to a colleague, bring in an extra approver, and see where a record stands.



HOW-TO Work on behalf of a colleague

When someone delegates their work to you · 0:45 · Recorded on OSOS 1.11.0-alpha.1

If you only submit requests and follow them, start with Services & Submitting Requests.

How it works

Many records follow a **workflow**: a route of stages, called **steps**, that someone in your organization designed. Each step belongs to an **owner**. The owner can be one person, or a group of people where any member can pick it up. The owner moves the record on with one of the step's **actions**, such as **Approve**, **Return** or **Reject**. The designer of the workflow names these buttons, so yours may be called something else.

An example. Omar submits an expense claim. The first step, *Manager review*, belongs to his manager Lina. She opens the claim from her **Inbox** and sees an **Approve** button with an arrow next to it that offers **Return** and **Reject**. She approves it, and the claim moves to *Finance check*, which belongs to the whole Finance team. Any member of the team can select **Take Ownership**, and the claim is theirs to finish.

What you see on a record depends on whether the current step is yours:

- **The step is yours.** The top of the record shows the step's main action button, an arrow with the step's other actions, **Edit Entry** for the fields this step lets you change, and **Back**.
- **The step is not yours.** You can read the record and its route, but you can't act on it. **Back** returns you to the list you came from.

Back only takes you back to the previous screen. It is not the same as an action named **Return**, which sends the record back along its route.

The page you open the record from also matters. Two people can see different buttons on the same record because their pages offer different options.

Act on a step that is yours

1. In the sidebar, open **Services** › **Inbox**, or open the list where the record lives. Records waiting for you are on the **Ongoing** tab.
2. Open the record and review it. If the step lets you change some fields, select **Edit Entry**, make your changes and select **Save**.
3. Select the action you want. The main action is the button itself. For the others, such as **Return** or **Reject**, select the arrow next to it.
4. If a dialog opens, type a note in **Leave a Comment**, then select the button that carries the action's name, such as **Approve**. If the note is required, that button stays disabled until you type one.
5. If an **Additional verification** dialog opens, see Confirm it's you before an action runs.

The record moves to its next step, and the new owner is notified. Your action and the time appear in the record's workflow history. Your note appears on the **Discussion** tab, under the step's name (for example *In Step "Manager approval"*:), if the page's designer turned on **Workflow comments** (under **Entries details** › **Discussion**); otherwise it is not shown on the record.

If the step still needs information before it can move on, for example a required field that is empty, you are taken to the form first. Fill it in, save it, and select the action again.

Confirm it's you before an action runs `Since 1.10`

Some actions ask you to confirm your identity right before they run, even though you are already signed in. The workflow's designer decides which ones.

1. Select the action and fill in its dialog as usual.
2. In **Additional verification**, enter the code from your authenticator app, or the one-time code sent to you by SMS or email. If you have none of these, you are asked for your account password instead.
3. The action runs as soon as the code is accepted.

Good to know:

- A passkey isn't offered here, even if you sign in with one. This check needs a code you type.
- The verification lasts only a couple of minutes and covers only that one action. Don't leave the dialog open.
- If you cancel or close the dialog, the action doesn't run and the record stays where it was. You see *Verification was not completed; the action was not executed.* Select the action again when you are ready.
- This check is separate from the one you pass to reveal a protected value. Passing one never counts for the other. See Account Security.

- If your page lets you act on a step you don't own, as an administrator acting for the owner, you aren't asked to verify.

Act on several records at once

You can apply the same action to several records in one go, for example to approve a batch of requests.

1. In the list, select the records.
2. Select the action and confirm it.

All the records you select must be on the **same step**. Otherwise nothing is done. Each record is then handled on its own, so some can succeed while others fail. For any record that fails, open it and act on it from its own page.

If the action asks you to confirm your identity, you verify **once** for the whole selection. If you cancel, nothing in the selection runs. A selection that is too large for one verification shows a message asking you to select fewer records.

If someone else acted first `Since 1.10`

If a colleague acted on the same record, or changed its owner or step, after you opened it, your action is refused and nothing is recorded. You see **This record has changed**.

1. Select **Reload**.
2. Check where the record now stands, and act again if it is still yours.

Changes other people made to the record's fields are kept. If you had already confirmed your identity, you can use the same verification again while it is still valid.

See where a record stands

Open the record and select the workflow tab in its side panel: the route icon. Most side-panel tabs show only their icons; a tab's name (**WorkFlow** for this one) appears when you point at it or open it. The tab is there only if the page's designer turned on **Workflow path** (under **Entries details**); without it, read what happened on the record's **History** tab. The tab stays on a completed record, with every step marked done. It lists the route's steps in order:

- **Steps already done** show who acted and when.
- **The current step** is highlighted, with its owner and how long it has been waiting.
- **Upcoming steps** are listed without their details. If the route depends on a choice made later, for example an amount that sends large claims to a director, the upcoming steps can't be shown yet.

Turn on **Show History** at the bottom of the tab to see everything that happened, including steps that ran more than once and smaller routes that ran inside the main one. The switch only appears if your page offers the full history. `Since 1.8` The page's designer can make the tab open on the full history instead of the route. The mobile app follows the same setting.

The **History** tab, if the page shows it, lists everything that happened to the record, newest first: workflow actions, owner changes, steps added or moved, and changes to its values. If a step took longer than its allowed time, you see **Exceeded Time** there.

Some pages hide the names of step owners, or show only the steps that are yours. Visitors who aren't signed in never see who owns or handled a step.

A step owned by a group lists every member

When a step belongs to a group, the route lists every member of the group. The person who acted is ticked, with the time. The others stay listed, unticked, so you can always see who the step was offered to, not only who answered it.

After a workflow is reset `Since 1.8`

When someone resets a record's workflow, the record starts its route again. The history then shows only the steps of the new run.

Take ownership of your group's step

When a step is offered to a group, a list of people or a team, it may wait without an owner until one member picks it up.

1. Open the record. If you belong to the group and nobody holds the step yet, you see **Take Ownership**.
2. Select **Take Ownership** and confirm.
3. The step is now yours. Act on it as described in Act on a step that is yours.

If someone else took the step a moment before you, you see a message saying the step already has an owner. Reload the record to see who has it.

Act without taking ownership first `Since 1.10`

On some pages you don't need to press **Take Ownership** first. The step's own action buttons appear instead. When you select one, the step becomes yours and the action runs straight away. If the step can't be claimed, the action doesn't run.

On other pages, **Take Ownership** is a split button: the other actions you can use on the record, such as **Back** or **Edit Entry**, are in its dropdown.

A step waiting for someone in the group `Since 1.8`

A group's step can sit without an owner on purpose, waiting for a volunteer. This happens when someone hands the step back to the group, or when an automatic rule leaves the choice to the group. **Take Ownership** appears for you when:

- the step has no owner right now,
- it was offered to a group or a list of people, not to one person,
- the step is set up for one member to pick it up, and
- you belong to that group or list.

Hand your step to someone else

If a step is yours and its design allows it, you can pass it to a colleague, for example while you are away.

1. Open the record and select **Reassign Owner**. If you don't see it, look under **More**.
2. In **Choose Owner**, search for the person. People whose accounts are archived or switched off aren't offered.
3. Optionally, explain why in **Leave a Comment**.
4. Confirm.

The step now belongs to the new owner. If the page shows workflow comments, your note also appears in the record's discussion, so others can see why the step moved. See Comments & Collaboration.

Bring in an extra approver

If the step allows it, you can add an extra step without changing the workflow, for example to ask a specialist to sign off on a contract before you approve it.

1. Open the record and select **Add ad hoc step**. If you don't see it, look under **More**.
2. In **Step Type**, choose **Additional Approval** to ask for an extra sign-off, or **Additional Information** to ask someone for more details.
3. In **Assign to**, choose **User** or **Group**, then pick who should handle it.
4. Optionally, add a **Note** that explains why. It is shown later next to the extra step. `Since 1.8`
5. Confirm, then select **Create** when asked *Are you sure you want to create this step?*

The record waits at the extra step until that person or group acts. Then it comes back to your step, and you continue where you left off.

Complete a step in another system `Since 1.8`

Some steps send you to an outside system instead of showing action buttons, for example an e-signature service, a payment page or a partner portal. The step moves on only when that system reports back.

When the step is yours, the outside page opens by itself as soon as the record reaches the step. If the step isn't yours, you see it like any other step you don't own.

Depending on how the step was set up, the outside page opens in one of these ways:

Opens as	What you see
Full Screen	Your browser goes to the outside page.
Iframe	The outside page appears inside the record.
Sidebar	The outside page opens in a side panel.
Dialog	The outside page opens in a pop-up dialog.
Popup Window	The outside page opens in a new browser window or tab.

If your browser blocks the window, you see *Your browser blocked this popup. Allow popups and retry.* Allow pop-ups for the portal, then select **Retry**.

When you finish in the outside system, it brings you back to OSOS and the record shows its new step. If something goes wrong on the way back, you see a short message instead:

Message	What to do
This step has already been completed.	Nothing. The step has moved on.
This link is invalid or has expired.	Open the record again from your **Inbox**.
We couldn't confirm this step. Please try again or contact support if the problem persists.	Try again. If it keeps happening, contact support.
This step completed, but we couldn't open the updated entry. Please refresh and try again.	Refresh the page.

If the record is archived or out of date while it waits on this step, the outside page no longer opens. You can still upgrade an out-of-date record.

The mobile app opens outside pages as **Full Screen** or **Iframe**. A step set up to open any other way opens full screen on mobile.

Act for a colleague

If a colleague delegated their work to you, you can act on their steps while the delegation lasts. To start, open your profile menu, select **Delegations** and choose the colleague. While you act for them, the top bar shows a badge with their name and a button to go back to being yourself. Your actions are marked **On behalf of** in the record's **WorkFlow** and **History** tabs, so everyone can see that a delegate acted. See Portal Layout & Navigation.

A manager can also act on a step on behalf of its owner, without reassigning it first. The history then shows the manager as the person who acted.

Extra controls some pages give you

Some pages give reviewers or administrators extra control over a record's route. These appear under **Admin Actions** only if the page grants them:

Action	What it does
Return to previous step	Sends the record back to a step it has already been through.
Move to Step	Moves the record forward to a later step. The steps in between are marked as skipped.
Reset Workflow	Starts the route again from the beginning. Not offered while the record is still on its first step.
Close workflow	Ends the route.
Change Owner	Gives the current step to someone else. In **Change Type**, choose **Temporary** for this visit only, or **Permanent** so the new owner keeps the step if the record comes back to it later.

Each action takes an optional note. You can't move a record straight to its last step, or forward past a step that is waiting for an outside system: while the record is on such a step, these actions are shown but greyed out.

The step's field rules still apply to you `Since 1.6`

A page can let reviewers see and edit every field, including fields that the current step hides or locks. That only applies to people who take no part in the current step. If the step is yours, or your group's, the step's rules apply to you on that page too.

Good to know

- **Time limits.** A step can have a time limit. If it runs out before the step is done, the record's **History** tab marks it **Exceeded Time**, and your organization may send reminders or escalate it.
- **Lists stay current.** Your **Inbox** and other lists update by themselves when someone acts on a record.
- **Records shown from another record.** Some lists show rows that come from another record. Once that other record's route has finished, **Edit Entry** no longer appears on those rows. `Since 1.8`

Troubleshooting

What you see	What it means and what to do
No action buttons on a record	The current step isn't yours. Check the **WorkFlow** tab to see who owns it.
Take Ownership but no action buttons	The step belongs to your group and nobody holds it yet. Select **Take Ownership** first.
The action button stays disabled in its dialog	The note is required. Type one in **Leave a Comment**.
You are taken to the form instead of the action running	A field this step needs is empty. Fill it in, save, and select the action again.
A message says the action isn't allowed	The action isn't available for this record, or you already did your part on a step several people must each complete.
This record has changed	Someone acted first. Select **Reload**, check the record and act again.
This user already own this step.	You picked the current owner. Choose someone else.
A message says you can't change the owner	The step's design doesn't let you hand it on. Ask the workflow's owner or your administrator.
The **Admin Actions** are greyed out	The record is waiting for an outside system. They come back once that step is done.
This action requires additional verification of your identity before it can be executed.	Confirm it's you in the **Additional verification** dialog. See Confirm it's you before an action runs.
Verification is no longer valid. Run the action again.	The verification expired or the record moved on. Select the action again.

Go deeper

For builders: Workflows (Design) [Build Apps › Workflows & approvals] · For integrators: Workflow participation reference [Integrate & Extend] · Workflow model and API reference [Integrate & Extend]

Comments & Collaboration

This page is for anyone who works on records together with colleagues. It shows you how to discuss a record in its comments, mention people so they are notified, attach files, keep a comment between a few people, react to posts, read the emails sent about a record, and join a call on a record.

How it works

Every record can have its own discussion: a thread of comments that stays with that record. Comments on one record never appear on another. The thread also shows notes that people left when they acted on the record's workflow steps, so you can follow the whole conversation in one place.

An example. A purchase request for new laptops is waiting for IT's opinion. The buyer opens the record, selects the **Discussion** tab and writes *@Sami can you confirm these models are supported?*. Sami gets a notification, opens the record from it, attaches the supported-models list and replies. When the manager later returns the request with a note, that note appears in the same thread.

What you can do depends on the page you opened the record from. If you don't see the **Discussion** tab, the comment box, the attach button or mentions, this page has that feature turned off. It is not a problem with your account.

Read a record's comments

1. Open the record.
2. Select the **Discussion** tab in its side panel.

Comments are listed oldest first. Each one shows its author with their picture, the time, the text, any attached files and, when the comment was meant for particular people, who it was addressed to. A record with no comments shows **No Comments Found**.

You also see:

- **Workflow notes.** If the page shows workflow comments, a note left with a workflow action appears in the thread, labelled with the step it came from.
- **Owner change notes** `Since 1.10`. A note left when someone reassigned a step or changed its owner appears here too. If you already have the record open in another tab, that note shows up after you reopen the record or switch tabs and back.
- **Anonymous comments** `Since 1.10`. A comment left by a visitor who wasn't signed in, on a public page, is shown as **Anonymous**.

Write a comment

1. Open the record and select the **Discussion** tab.
2. Type in **Write your comment**.
3. To attach files, select the attach button and choose them. See Attach files.
4. To keep the comment between a few people, see Address a comment to particular people.
5. Select the send button.

Your name and the time are added for you.

Change who a comment is addressed to

You can change who one of **your own** comments is addressed to. Select the names after **to** on your comment, then add or remove people and groups. You can't change the text of a comment after you send it. Removing everyone makes the comment visible to everyone who can see the thread again.

There is no button to delete a comment.

Mention someone

1. In **Write your comment**, type **@** followed by the first letters of a person's or group's name. You can also type part of a person's email address or username.
2. Pick the person or group from the suggestions.
3. Finish your comment and send it.

The people you mention, and the members of the groups you mention, get an in-app notification titled **Mention**: *(your name) has mentioned you in a comment*.

Who you can mention depends on the page. It may be anyone in your organization, only people who can open this page, a fixed list, or people named in the record itself, such as its assignees. Visitors who aren't signed in can't mention anyone.

`Since 1.10` If you mentioned someone whose account or group was later deleted or switched off, the mention reads **@Unknown**. The rest of the thread still works.

Address a comment to particular people

A comment is visible to everyone who can see the record's thread, unless you address it to particular people. Then only you, the people you chose and the members of the groups you chose can see it.

1. Next to the send button, select **everyone** (after **To:**). If you don't see it, this page doesn't let you address comments.
2. In **Enter user or group**, pick the people or groups. The comment box then shows **you and** the number of others.
3. Write and send your comment.

Use this for a side conversation on a record that many people can see, for example to ask HR a question about an employee's request without the whole team reading it.

Comments kept to one page

Some pages keep their comments to themselves: a comment written on that page is only shown to people who open the record from the same page. On such a page you see that page's own comments plus every comment that isn't kept to a page.

Attach files

1. In the comment box, select the attach button.

2. Choose one or more files. To see which file types and sizes the page accepts, point at the attach button: its tip shows them, for example **Limit: 1 MB**.
3. Send the comment.

The page decides which file types you can attach and how large they can be. If it doesn't set a size, the limit is about 1 MB per file. If a file is too large or of a type the page doesn't accept, the comment isn't sent and you see *Failed to upload the file. Please ensure it meets the upload requirements and try again.*

A file you attach is kept only once you send the comment. If you attach a file and never send it, it isn't kept. `Since 1.10` For the messages you may see when an attached file expires, see Create and Edit Records.

React to a post

On timeline posts, and on other records where the page allows it, you can like a post. Select the like button to add your like, and select it again to take it away. You have one like per post.

Read a record's emails

If the page shows it, the **E-Mail** tab of a record lists the emails the platform sent about that record, such as workflow notifications.

1. Open the record and select the **E-Mail** tab.
2. Select an email to read it. Select **See all details** for the full message and its attachments.

You can only read emails here. You can't write or forward them.

Join a call on a record

Some records let colleagues meet in a live call about that record, with camera, microphone and screen sharing. Everyone who joins from the same record is in the same call.

1. Open the record.
2. In its actions, select **Join**.
3. Allow your browser to use your camera and microphone when it asks.

Calls work in the web portal only. **Join** appears only when the record's type has calls turned on.

Good to know

- **You need access to the record.** To read the comments you need to be able to view the record. To write a comment or react, you need to be able to edit it. Access you have through a module or a single type of record counts. `Since 1.8`
- **The page decides the features.** Discussions, writing comments, attaching files and mentions are each switched on or off per page.
- **Preview.** When a builder previews a page, its threads show sample comments. These are never real comments.

Troubleshooting

What you see	What to do
No **Discussion** tab	This page doesn't show discussions. Open the record from another page, or ask the page's owner.
You can read comments but there's no comment box	You can view this record but not edit it, or this page doesn't allow new comments.
No suggestions when you type **@**	Mentions are off on this page, or you aren't signed in.
Failed to upload the file. Please ensure it meets the upload requirements and try again.	The file is too large or of a type this page doesn't accept. Point at the attach button to see what the page accepts.
A mention shows **@Unknown**	The person's account or the group was removed.
A colleague can't see your comment	You addressed it to particular people, or it was written on a page that keeps comments to itself.
No **Join** in the record's actions	Calls aren't turned on for this kind of record, or you're on the mobile app.

Go deeper

For builders: Data Views & Faces [Build Apps] · For integrators: Comments and mentions reference [Integrate & Extend] · Real-time (sockets and calls) [Integrate & Extend › Real-time: live events and calls]

Export a List

This page is for anyone who needs records from the OSOS portal in a file: to work on them in a spreadsheet, send them to someone, or print them. It shows you the ways to export, how to run each one, and what ends up in the file.

How it works

You always export what you are allowed to see, through the view or list you have open. The view decides whether an export is offered at all.

What you want	Where	Formats	Web	Mobile app
The records in a list, as you see them	**Export Entries** in the list's actions menu	Excel (XLSX) or CSV	Yes	No
One of your own lists	**Export list** in the list's menu	Excel (XLSX)	Yes	Yes
Records laid out in a designed document	A print or export template, named by your organization	The template's format, or PDF	Yes	Yes
A report	The report page	PDF or Excel (XLSX)	Yes	No

CSV is available only from **Export Entries**.

An example. Lina filters the *Purchase Orders* view to this quarter's open orders, selects **Export Entries**, picks **Excel (XLSX)** and opens the file straight away. When she needs all 40,000 orders of the year, the export continues in the background and the bell tells her when the file is ready.

Export the records in a list `Since 1.10`

1. Open the view and narrow the list the way you want it: search, filters, quick filters. To export only some records, tick them.
2. Open the list's actions menu and select **Export Entries**.
3. In the **Export entries** dialog, choose **Excel (XLSX)** or **CSV**.

The file downloads. It is named after the list, with the date and time, for example *Purchase Orders_2026-11-20_14-05.xlsx*.

If **Export Entries** isn't there, the view doesn't allow exporting.

What the file contains

- **The records.** Every record that matches the list as you see it: your search, filters, quick filters (with the values you gave them), tags and filter-first values, in the list's order.
- **Only the records you ticked**, if you ticked any. You can export up to **150** ticked records this way. If you selected all matching records instead, the file has every match, including pages you haven't opened.
- **The columns** the table shows, in the order you arranged them. If the list has no table, the view's fields in their usual order.
- **No group headings and no totals**, even if the list on screen is grouped.

Field values are written the way you read them, not as raw data. See How values appear in a file.

Large exports

Up to **10,000** records download straight away. For more:

- **If you are signed in**, the export continues in the background and you get a notification when the file is ready. A background file holds up to 100,000 records; if there were more, its name says *first-* and the number it holds.
- **If you are not signed in**, for example on a public list, the dialog offers **Export first 10,000**. You can also cancel and narrow the list with filters, or sign in to receive the full file.

If a background export fails, you get no file and no notification. Run it again, or narrow the list first.

Technical details

- **CSV encoding.** The file is UTF-8 with a byte-order mark, so Excel shows Arabic text correctly, and its values are separated by commas.
- **Formula protection.** A text value that starts with `=`, `+`, `-` or `@` gets a leading apostrophe so that a spreadsheet doesn't run it as a formula. Numbers, and text that reads as a number (such as `-5` or a `+966…` phone number), are left as they are.
- **Sections.** A field inside a section becomes a column named *Section › Field*. In Excel such columns get a two-row header with the section name merged above its fields.
- **Limits.** The 10,000 and 100,000 limits are defaults that your organization's operators can change.

Export one of your lists

1. Open the list from the sidebar. See Lists: Keep Records Together.
2. Open the list's menu and select **Export list**.

You get an Excel file with one worksheet named after the list, one column per field the list shows, and your organization's header image at the top if it has one. Fields inside a section become grouped columns, and repeating sections become repeated groups of columns. If the list is empty, you see *The list has no entries to export*.

How values appear in a file

Field	In the file
A linked record or a person	The record's title, for example the person's full name
Category	The option's label
Date	`DD/MM/YYYY`
Date and time	`DD/MM/YYYY hh:mm`
Time	`hh:mm`
Time range	`hh:mm - hh:mm`
Month and year	`MM/yyyy`
Date or date-and-time range	`start - end`
File, image or document	The file name
Switch	The chosen value's title
Map	The saved coordinates

Field	In the file
A field with several values	The values, separated by commas
Password	Always `****`
A protected field you can't read	`****`

If one value can't be written in its column, that cell is left blank and the rest of the file is produced as usual. A blank cell in an otherwise complete file is worth checking against the record on screen.

Print or export with a template

Your organization can set up templates that lay records out as a designed document, spreadsheet or page, and can turn them into a PDF.

1. Open the list, or open a record. In a list, tick the records you want.
2. Open the actions menu and select the template by its name.

Small jobs download straight away. Large ones run in the background so you can keep working, and you are notified when the file is ready. A template export leaves out quick filters that ask for a value, and tells you so when it starts.

Export a report to PDF or Excel

Reports produce PDF and Excel files laid out by your organization, with a header and footer, page numbers ("Page X of Y", in English or Arabic to match your language) and portrait or landscape pages. Reports are available on the web only. See Dashboards & Reports.

Troubleshooting

What you see	What to do
Select at most 150 entries to export, or clear the selection to export every result.	Tick fewer records, or clear your selection to export every match.
Apply the required filters before exporting.	The list asks for a filter first. Fill it in, search, then export.
The export failed. Please try again.	Try again. If it keeps failing, narrow the list with filters.
The file has fewer records than you expected.	Check your search, filters and quick filters, and whether you ticked some records. A background file stops at 100,000 records.
A cell is blank.	That one value couldn't be written. Check it on the record.

Go deeper

For builders: Data Views & Faces [Build Apps] (turning on exports) · Templates [Build Apps › Export templates] · Reports [Build Apps]. For integrators: Records and lists: behaviour reference [Integrate & Extend › Records and Lists: Behaviour Reference].

Dashboards, Counters & Reports

This page is for anyone who follows figures in the OSOS portal, such as a team lead watching open requests or a manager who receives a monthly report. It shows you how to read a dashboard, open the records behind a number, use counters, and open, search and export a report.

You don't build any of these. Someone in your organization designs them and makes them available on the pages you can open.

How it works

- A **dashboard** is a set of **summaries** shown on a list's page: numbers, short lists and charts, such as *open requests by department*.
- A **counter** is a single live number, such as *requests waiting for me*. On the web, your counters sit in the top bar.
- A **report** is a ready-made table of records with set columns that you can search, filter and export to Excel or PDF.

An example. Nadia leads a support team. Each morning she opens the *Support tickets* list and selects its **Dashboard** tab. A pie chart shows tickets by status, and a number shows how many are overdue. She selects the *Overdue* slice to open those tickets. At the end of the month she opens the *Monthly tickets* report from the sidebar and selects **Export to Excel** to send it to her manager.

What you see depends on your access, on the space you're in, and on what the page's designer switched on. Two colleagues can see different summaries on the same dashboard.

Read a dashboard

1. Open the list from the sidebar.
2. If the list has a dashboard, select the **Dashboard** tab. The other tab, **Entries** or the list's own name, shows the records.
3. Read the summaries. Each one is a number, a short list of top values, or a chart: column, bar, line, pie or doughnut. A chart with many values groups the smallest ones under **Other Values**.

If the list has no **Dashboard** tab, its page doesn't have a dashboard.

Work with a summary

From a summary card you can:

- **Narrow it by date.** Choose **This Week**, **This Month** or **Range**, then pick the dates in **From - To**.
- **Enlarge it.** Select **Enlarge** in the card's menu to see it in a larger window.
- **Open the records behind it.** Select a number or a chart segment to open the matching records. This only works if the page's designer switched it on.

Summaries refresh by themselves while the page is open. The **N Entries** caption on a card counts the same records you see when you open them.

Protected figures `Since 1.10`

Some summaries are built on protected fields:

- If you aren't allowed to see the figure, the card shows a lock and *You do not have permission to view this summary*. The rest of the dashboard works as usual. Ask the dashboard's owner if you think you should see it.
- If you are allowed to see it but haven't revealed protected values yet, the card shows `****` and *Sensitive value — unmask sensitive fields to view it*. Select the eye on the card to confirm it's you and reveal the figure. See Account Security.

A card whose summary was deleted shows *The summary does not exist!*. A card with nothing to count shows **No Data**.

Your organization may also publish dashboards in Grafana, built on the same data. `Since 1.6` They show only the records your access allows, as here, but they work like any Grafana dashboard and this page doesn't cover them.

Use your counters

Counters show you a live number for the space you're in, such as how many records are waiting in a list.

- **On the web**, each counter is an icon in the top bar with a badge that shows its number (**99+** above 99). Select it to open a panel with its most recent records, and select a record to open it.
- **On the mobile app**, open the **Counters** screen. Tap a counter to open its records.

You only see counters for lists you can open in your current space. They appear in the order the designer set. On the mobile app, a counter that can't be loaded is simply left out.

Open a report

1. In the sidebar, select the report. You may also receive a link to a report by email, if a report is scheduled to be sent to you.
2. The report opens as a table with its own columns. Hover over its name to read its description.
3. Search it, filter it, or move through its pages like any list. If the report allows it, you can also choose which of its columns to show. See Search, Filter, Sort and Group a List.

Reports work in the web portal only. On the mobile app a report link shows as unavailable.

Export a report

1. Open the report and narrow it with search or filters if you need to.
2. Open the actions menu at the top of the report.
3. Select **Export to Excel** or **Export to PDF**.

The file is named after the report and keeps your search and filters. If the report lets you choose columns, the file has the columns you chose. A PDF follows the report's layout, such as its orientation, header, footer and page numbers. Reports can't be exported to CSV; to get CSV, export a list instead. See Export a List.

Protected fields you aren't allowed to read show as `****` in the report, in the exported file and in emailed copies. Ask your administrator if you need access.

Reports sent by email

A report's owner can schedule it to be emailed to you, with a link to open it in the portal, the file attached, or both. `Since 1.8` The email always arrives on schedule. If the file can't be attached, you still get the email with its link.

Good to know

- **Which reports you see.** A report appears only once its owner has published it, and either to everyone or only to the people they chose.
- **You can't change dashboards or reports.** Creating, editing or publishing them needs builder or administrator access.
- **Preview.** When a builder previews a page, its summaries show sample figures. What you see on the live page is real data.

Troubleshooting

What you see	What to do
No **Dashboard** tab on a list	This list's page has no dashboard. Ask its owner if you expected one.
A summary shows a lock and *You do not have permission to view this summary*	The figure uses a protected field you aren't allowed to see.
A summary shows `****`	Select the eye on the card and confirm it's you to reveal it.
Selecting a chart doesn't open records	Opening records from the dashboard is switched off on this page.
A report isn't in your sidebar	It isn't published to you, or it belongs to another space.
A report link says unavailable on your phone	Reports work on the web only. Open the link in a browser.
A colleague's dashboard shows more summaries	They have access to figures you don't.

Technical details

- Only active counters are listed, highest display order first. A counter's count and its records are always checked against the page it belongs to.
- A dashboard loads all its cards in one request. A card you can't read, or whose summary was deleted, shows its own message without stopping the others. `Since 1.10`
- `Since 1.4` the "N Entries" caption applies the page's own filter, and the counter list stays fast however many pages your organization has. Both were also delivered to the 1.4, 1.6 and 1.8 lines as updates.

Go deeper

For builders: Summaries & dashboards [Build Apps › Summaries, dashboards & counters] · Reports [Build Apps] · For integrators: Dashboard API [Integrate & Extend › Dashboard — data-service] · Counter widget API [Integrate & Extend › CounterWidget — data-service] · Report API [Integrate & Extend › ReportEntry — data-service]

Receiving Notifications

This page is for everyone who uses the OSOS portal or mobile app. It shows you where your notifications appear, how to read and open them, how to get pop-ups on your phone, and what to do with a notification that a colleague's delegation forwarded to you. It also explains which emails and text messages the platform may send you.

How it works

When something happens that concerns you, for example a request reaches your step, a file you exported is ready, or you asked to reset your password, the platform can tell you in up to four ways:

Where	What you get
The bell at the top of the portal, and the **Notifications** tab in the mobile app	A list of your notifications. Unread ones stand out. This is the only place you can read them again later.
Pop-ups on your phone	The same notifications, as alerts from the mobile app, even when the app is closed.
Email	Messages your organization's automations send, and account emails such as a password reset link.
Text message	Short messages your organization's automations send.

Your organization decides which events notify you and how. You don't need to subscribe to anything.

An example. Huda submits a leave request. When her manager returns it with a question, the portal's bell shows a red **1**, and a pop-up appears in the corner of the screen. Huda is out of the office, so her phone shows the same notification as an alert. She taps it, the mobile app opens the request, and the notification is marked as read on both her phone and the web.

Read your notifications on the web

1. Select the bell at the top of the portal. The number on it is how many notifications you haven't read yet. Above 99 it shows **99+**.
2. The **Notifications** panel lists your latest notifications. Unread ones are highlighted. Scroll down to load older ones.
3. Select a notification to open what it's about, such as the record or request. It's marked as read, and the number on the bell goes down.
4. To see the full list, select **All Notifications**. The list always opens on its first page.

When there's nothing new, the panel says **There are no new notifications**.

New notifications while you work `Since 1.10`

While the portal is open, a new notification arrives by itself: a short pop-up message appears and the number on the bell goes up. You don't have to reload the page.

You only see live notifications for the space you're working in. If you belong to several spaces, a notification for another space waits until you open that space, so you don't get the same pop-up twice.

Notifications that open a page `Since 1.10`

Some notifications take you to a particular page in the portal, for example a package page in the marketplace. Selecting one, in the bell panel or in **All Notifications**, marks it as read and opens that page.

Notifications on the mobile app

1. Open the **Notifications** tab at the bottom of the app. The number on it is how many you haven't read.
2. Tap a notification to open what it's about. It's marked as read straight away.
3. Scroll down to load older ones.

While the app is open, a new notification also appears as a banner at the top of the screen. Tap it to see the details.

Get pop-ups on your phone

The mobile app sends you pop-up alerts, even when it's closed.

1. Sign in to the mobile app.
2. When your phone asks whether the app may send notifications, allow it.

That's all. The app registers your phone for you.

- **To stop pop-ups**, turn notifications off for the app in your phone's settings. Your notifications still appear in the app and on the web.
- **A phone you haven't used for a long time** stops getting pop-ups after about 90 days `Since 1.10`. Sign in on it again to start them again.
- **Each phone gets each pop-up once** `Since 1.10`, even if it was registered more than once.

The web portal doesn't send pop-ups to your computer when the portal is closed. You see new notifications the next time you open it.

Notifications forwarded from a colleague `Since 1.10`

When a colleague delegates their work to you, the delegation can include **Forward Notifications** and **Forward Emails**. Then, while the delegation is active, you also receive a copy of their notifications (or emails) for the work they delegated. You still get your own notifications as usual, and you never get a second copy of something that was already addressed to you.

A forwarded notification shows whose it is (on the mobile app, **Delegated from** and their name) and arrives unread. To open it:

1. Select it.
2. If you're already acting for that colleague, it opens straight away.
3. Otherwise you're asked to confirm: **Switch to *name*'s account**, with the message that you'll act on their behalf within your delegated permissions. Select **Continue**. The portal switches to acting for them and opens the notification.

If the delegation has ended, or you're acting for a different colleague, the notification is greyed out and says **This delegation is no longer available**.

On the mobile app, a forwarded notification is marked as read only when it actually opens, and any file attached to it isn't downloaded to your phone.

Forwarded **emails** reach you as a copy: you're added in CC, or in BCC if your colleague was in BCC. Your colleague still gets the email.

Whether forwarding is on is part of the delegation. Ask whoever manages delegations in your organization. Signing out also stops acting for a colleague, so your next sign-in starts as yourself.

When an exported file is ready

When you export a large list or generate a file that takes a while, you don't have to wait on the screen. When the file is ready, you get a notification titled **Your file is ready to download**, with the file attached. Select it to get the file. If you use the mobile app, you also get it as a pop-up.

If the export fails part-way, you don't get a notification and no file is made `Since 1.10`, so you're never handed a broken file. If the notification doesn't arrive, export again, or narrow the list with filters first. See Quick export.

Emails and text messages

You may receive:

- **Emails from your organization's automations**, for example when a request reaches a step. They can include attachments and a link to the item.
- **A password reset email**, when you ask for one. See Forgot your password.
- **An API token email**, if you're the contact for an application that was given an API token. It contains the token, so store it safely.
- **Text messages from your organization's automations**, usually short alerts with a link.

Links in emails and text messages point to your own space's address and are shortened, so they're easy to select. Emails and text messages go to the email address and phone number on your profile. They don't appear in your notification list.

Can I choose what I receive?

Not yourself. There is no page where you turn notifications on or off by type.

- **In the portal and the app**, you receive every notification your organization creates for you.
- **Pop-ups** depend on whether you allowed the app to send notifications on your phone.
- **Emails and text messages** are set up by your organization, and go to the contact details on your profile.

If you get too many, or too few, ask your administrator.

Good to know

- **Only yours, only here.** You only see your own notifications, and only for the space you're in. Archived notifications aren't shown.
- **One at a time.** A notification is marked as read when you open it. There is no "mark all as read" and no way to delete a notification yourself.
- **Language of pop-ups.** Phone pop-ups arrive in English when an English version exists. The notification list in the portal and the app shows your own language when the notification has it.
- **Request notifications** such as **Action Required** are explained in Services & Submitting Requests.

Troubleshooting

What you see	What to do
No pop-ups on your phone	Check that notifications are allowed for the app in your phone's settings. If you haven't used the app for a long time, sign in again.
A notification you expected isn't there	Check you're in the right space. If it was about an export, the export may have failed: try again. Otherwise ask your administrator whether that event notifies you.
This delegation is no longer available	The delegation has ended, or you're acting for someone else. Stop acting for the other colleague, or ask them to renew the delegation.
The number on the bell seems wrong	Reload the page.
An email or text message went to an old address or number	Ask your administrator to update the contact details on your profile.

Go deeper

For administrators: Notification configuration [Administration › Notifications & email templates] · For integrators: Notifications and delivery (API and internals) [Integrate & Extend]

Web vs Mobile

This page is for everyone who uses OSOS on a phone as well as, or instead of, a computer. It shows you how to install and sign in to the mobile app, how to find your way around it, and which tasks work on the phone and which need the web portal.

How it works

The web portal and the mobile app show the same organization, the same records and the same requests. Your organization sets up its applications once, and they appear in both. A change you make on the phone is there when you open the web portal, and the other way round.

- **The mobile app** (iPhone and Android) is for getting your work done on the move: submitting and approving requests, finding and updating records, scanning codes, and getting pop-up alerts. It can also unlock with your face or fingerprint.
- **The web portal** does everything the app does, and more: reports, editing a record together with colleagues at the same time, managing collections, and everything to do with building and setting up applications.

An example. Yousef is a field engineer. In the morning he gets a pop-up on his phone: a maintenance request is waiting for him. He opens it in the app, scans the QR code on the machine to fill in its asset number, records his location, and approves the step. Back at his desk, he opens the monthly report on the web portal, because reports are on the web only.

Get started with the mobile app

1. Install the app from the **App Store** (iPhone) or **Google Play** (Android). Your organization tells you which app to look for.

2. Open it and choose your language: English or Arabic.

3. If the app asks for **Hub URL**, enter your organization's address. Your organization gives you this address; it's usually the same one you use for the web portal. An app built for one organization already knows its address and goes straight to **Login**.

   If you only want to look at pages that are open to everyone, such as a visitor page, select **Continue as Guest** instead. You can sign in later with **Login**.

4. Sign in with your **Username/ Email** and **Password**. Tick **Remember me** to stay signed in. If you've forgotten your password, select **Forgot password?**. See Forgot your password.

5. If you're asked for a code, enter it. See Confirm it's you.

Find your way around the app

The bar at the bottom of the app has:

Button	What it opens
Home	Your home page.
Go To	Your applications, lists, saved queries and collections. You can search it, and it shows counts for your services.
Services	The services you can submit. It only appears if your organization uses services.
Notifications	Your notifications. Only when you're signed in. See Notifications on the mobile app.
More	Your spaces and switching between them, delegations, and signing out.

Switching between these refreshes the numbers on them.

Your profile, security settings and sign-ins are in the **User Center**, with the tabs **Profile**, **Security** and **Logins**. See Your profile and security on the phone.

Switch organization or space

The app calls an organization's address a **hub**.

- **Add another organization.** Select **Add a Hub** and enter its address. The app can keep it in **Saved hubs**, so you can switch back quickly.
- **Switch organization.** Select **Switch Hub** and choose one of your saved hubs.
- **Switch space.** After you choose a hub, the app loads your spaces. It may pick the matching space for you, or you choose one from **Select Space**.

If you choose a space you don't have access to, the app says **You don't have access to this space!** and offers the spaces you can open.

Unlock with your face or fingerprint

In the app's settings, select **Activate Biometric ID**. From then on, the app asks for your face, fingerprint or other biometric check before it opens. To stop it, select **Deactivate Biometric ID**. This is on the phone only.

Your profile and security on the phone

The **User Center** has three tabs, the same as **User Preferences** on the web:

- **Profile**: your details. To change your name, birthdate, gender or picture, select **Edit Basic Information**. The form keeps the names you entered in other languages and saves only your basic information. If saving works but refreshing your profile fails, the form stays open so you can try again.
- **Security**: your password, two-factor authentication, recovery codes and passkeys. See Account Security.
- **Logins**: the devices signed in to your account and recent sign-in attempts.

There is no separate **Security** item in the app's menu. Use the tab.

Settings on the phone

In the app's **Settings** you can choose your **Language**, **Theme**, time zone, **Date Format**, **Time Format** and date-time format, or reset them. They're saved to your account, so they also apply on the web. After a change, the app refreshes for a moment.

Sign out of the mobile app

1. Open the menu and select **Logout**.
2. Confirm.
    - If you've added more than one organization, the app asks **Do you want to remove the Hub too?** Select **Only Logout** to keep it in your saved hubs, or **Yes, Logout and remove Hub** to remove it.
    - As a guest, you're signed out straight away.

Signing out clears your details, notifications and display choices from the app. On the web, sign out from your profile menu with **Sign Out**.

What works where

✅ works · ⚠️ works with limits · ⛔ not available

Signing in

Task	Web	Phone	Notes
Sign in with your organization's sign-in page	✅	✅	Same page on both.
Use the portal as a guest	✅	✅	A guest can't act for a colleague and has no history.
Unlock with face or fingerprint	⛔	✅	
Act for a colleague who delegated to you	✅	✅	Not as a guest.
Switch space	✅	✅	

Services and requests

Task	Web	Phone	Notes
Find a service	✅	✅	
Submit a request	✅	✅	You can save a draft on both.
Outbox, **Inbox**, **Watching**	✅	✅	

The web portal also has fuller public pages for services and requests, which your organization may publish. The app shows services more simply.

Lists and records

Both show the same list displays: table, cards, calendar, board, timeline and tree. The **mini card** display isn't available on the phone: it shows an empty area, so ask the list's owner for another display if you need it.

Task	Web	Phone	Notes
Add, edit and quick-edit records	✅	✅	
Drafts	✅	✅	
Add several records at once, edit several at once	✅	✅	
Delete a record permanently	✅	✅	Not while other records point to it.
Edit a record together with colleagues at the same time	✅	⛔	
JSON (object) fields	⚠️	⛔	The web has an editor; the phone doesn't show them.

Task	Web	Phone	Notes
Masked (`****`) values	✅	✅	You can still edit a masked value on both.
Reorder repeated values and rows by dragging	✅	✅	`Since 1.8`
Map fields	✅	✅	The phone can fill in your current location.
Record history	✅	✅	
Move cards on a board	✅	⚠️	On the phone you can move cards, but not reorder columns.

On the phone:

- the **table** offers quick add, row selection and column reordering;
- the **calendar** has month, week, day and list views;
- the **timeline** shows pinned records first, then the rest by date;
- the **tree** opens its branches as you expand them;
- the **card** display has several layouts;
- one screen can show several lists as tabs side by side.

Grouping and totals `Since 1.10`

Grouped records and totals work on the phone as on the web, on a **table** display only: the same collapsible group headings, subtotals per group and a grand total. What grouping means is explained once, for both, in Grouping and totals.

Task	Web	Phone	Notes
See grouped records and totals	✅	✅	Table display only on the phone.
A collapsed group still shows its subtotal	✅	⛔	On the phone, collapsing a group hides its subtotal.
Choose your own grouping, or reset it	✅	✅	Only where the list allows it.
Set up a list's grouping or totals	✅	⛔	That's done on the web, by the list's builder.

- **Your own grouping is remembered differently.** On the web it lasts until you reopen the list. On the phone it's saved, so it's still there next time.
- **The phone doesn't show the kind of total** (sum, count and so on), only its name and figure.

Reveal an encrypted value on the phone `Since 1.10`

Tap the masked value itself; there's no separate eye button. You're asked to prove it's you before the value shows. A screen reader announces *"Encrypted field, value hidden. Tap to decrypt"*. See Reveal an encrypted value.

Filtering and search

Task	Web	Phone	Notes
Quick filters	✅	✅	
Build a filter	✅	✅	
Saved queries	✅	✅	Listed under the list in the sidebar on both.
Tags	✅	✅	
Sort	✅	✅	
Show archived records	✅	✅	Where the list allows it. Your choice stays when you switch display, including the tree, at every level `Since 1.8`.

Task	Web	Phone	Notes
Search the whole portal	✅	✅	

On the phone, the **Background color**, **Border color** and **Tag** style chips of a list each have a **Reset** in their settings `Since 1.10`. Reset clears that one choice for this visit; the list's own setting comes back next time you open it.

Collections

Task	Web	Phone	Notes
Open collections	✅	✅	Unless your organization has turned collections off.
Add records to a collection	✅	✅	
Create, copy or share a collection	✅	⛔	

Dashboards, counters and reports

Task	Web	Phone	Notes
Summaries and charts	✅	✅	
Select a chart to see its records	✅	⚠️	Only where the builder turned it on.
Counters	✅	✅	On the phone, counters appear as a side menu; tap one to open its records.
Reports	✅	⛔	Web only. They don't appear in the app's sidebar.
Save a page as PDF	✅	⛔	
Export a list	✅	⚠️	The phone exports through the list's export templates, such as **Export to Excel**. **Export Entries** and CSV are web only. See Exporting Data.

Workflows

Task	Web	Phone	Notes
Approve, reject and other step actions	✅	✅	
Take, assign or reassign a step	✅	✅	
Add an extra step on the fly	✅	✅	On the phone, its description shows as a tooltip next to the step name when it's the current step `Since 1.10`.
Run a button's action	✅	✅	One kind of button, which takes you to a related record, doesn't work on the phone.
Steps handled by an outside system	✅	⚠️	See below.
Live updates	✅	✅	

The **Duplicate** command always shows its name on the phone `Since 1.10`.

Steps handled by an outside system `Since 1.8`

Some steps send you to another system to finish the task, and come back when you have. Only the person whose step it is gets this; everyone else sees that there's no action for them. The builder chooses how the other system opens:

Opens as	Web	Phone
Full Screen	Full page	Full screen

Opens as	Web	Phone
Iframe	Inside the record	Inside the record
Sidebar	Side panel	Full screen
Dialog	Dialog box	Full screen
Popup Window	New browser window	Full screen

On the web, if your browser blocks the popup window, you're told so. Allow popups for the portal and try again.

Working with others

Task	Web	Phone	Notes
Comments and discussions	✅	✅	
Mention colleagues	✅	✅	
Choose who sees a comment	✅	✅	
Attach files to comments	✅	✅	Which files you can attach is set per list; the usual limit is about 1 MB.
Reactions on posts	✅	✅	On the phone, tap to like, or press and hold to choose another reaction.
Timeline posts	✅	✅	Publishing, scheduling and pinning depend on your permissions.
Emails on a record	✅	✅	

On the phone, a comment you send appears straight away and is sent in the background, one after another. Each shows whether it's sending, sent or failed; you can resend or delete a failed one. New comments from others arrive by themselves.

Notifications

Task	Web	Phone	Notes
Notification list	✅	✅	
Pop-ups when the app or portal is closed	⛔	✅	The web shows new notifications while it's open.
Emails and text messages	✅	✅	Sent by your organization's automations.
Open the record, download the file, go to a page	✅	✅	

Only on the phone

- Unlocking with your face or fingerprint.
- Pop-up alerts when the app is closed.
- Scanning a QR code or barcode with the camera, for example to fill in a field.
- Filling in a map field with your current location.

Only on the web

- Reports, and saving a page as PDF.
- Editing a record together with colleagues at the same time.
- JSON fields, and creating, copying or sharing collections.
- **Export Entries** (Excel or CSV), including exporting only the rows you selected `Since 1.10`.

- The clear messages when a file you attached has expired or storage is briefly unavailable `Since 1.10`. The same rules apply to a save from the phone, but the app shows a general error.
- Building and setting up applications, and almost all administration.

Which to use

- Use the **phone** for work on the move: submitting and approving, scanning codes, recording your location, and staying alerted.
- Use the **web portal** at a desk for the same work, plus reports, editing together, JSON fields, managing collections, exporting with **Export Entries**, and, if it's your job, building and administering applications.

For administrators on the phone

If you're an administrator, the app has a small administration area: access permissions (including sensitive-field grants), system logs, and some organization and service settings. Everything about designing applications stays on the web. See Sensitive-field grants [Administration › Sensitive Permissions].

Good to know

- **No offline mode.** The app and the web portal need a connection to work with your organization's data.
- **What your organization publishes** can differ between the web and the app, for example which public pages are available.
- **Lists can look different on the phone** if the list's builder chose a display the phone doesn't offer. See Lists and records.

What's New

This page is for people who use the portal and the mobile app. It lists what release **1.10** brings to your everyday work, grouped by what you do. Each item links to the page that explains it. Your organization has these once it runs 1.10.

For every release, including what changed for administrators, builders and operators, see Versions [General].

Lists and records

- **Group a list and see totals.** On a table, rows can be grouped under headings you can collapse, with a subtotal for each group and a grand total for everything your filters match. You can add a record under any group. See Grouping and totals.
- **Group a list your own way**, where the list allows it. Your grouping lasts for your session, then the list's own grouping returns; **Reset** clears it. See Grouping.
- **Boards by customer or project.** A board can have a column per record of another list, such as one per customer. See Board columns and moves.
- **Quick filters** can have names, sit in the **Status** list or stand alone, come in groups, and several can be on from the start. See Quick filter placement.
- **Queries that ask you for values.** A saved or quick query can ask for values in a **Query parameters** dialog. See Queries that ask for values.
- **A formula as a filter value**, with suggestions as you type and a warning when the result is the wrong kind. See A formula in a filter.
- **One page bar on every long list**: which items you're seeing, a jump to any page, and 20, 50 or 100 items per page. See The pagination bar.
- **A cleared sort stays cleared**, and an empty list of saved queries says **No queries found**. See Sorting.
- **Sensitive values in filters.** A sensitive field you have access to can be used in filters and queries. An encrypted field can never be filtered, searched or sorted. See Sensitive fields in filters.
- **Add a category option while you fill in a record**, where your administrator allows it, and pick several values in one category field. See Category options.
- **Attached files are kept only when you save**, with a clear message if a file has expired ("upload it again") or storage is briefly unavailable ("try saving again"). See Files you attach.
- **A warning when someone else saved the record you're editing**, if your organization has turned it on. See Save conflicts.
- **Pasted markdown keeps its formatting** in a markdown editor. See Pasting markdown.
- **Record QR codes appear straight away** and always point to the record's own link. See Entry QR codes.
- **Fields filled in from a record you picked** lose their **Required** warning straight away. See Working With Data.

Exporting

- **Export Entries** on any display exports every record that matches what you see, to Excel or CSV, where the list allows export. Tick up to 150 rows to export just those. It's on the web only. See Quick export.
- **A time range exports as "from - to"**, and a value that can't be written leaves one empty cell instead of stopping the export. See How field values appear.

- **A failed large export sends nothing**, rather than a broken file. If the "file ready" notification doesn't come, export again.

Requests and approvals

- **Act on a group's step without taking it first**, where the page allows it: the step's action buttons claim it for you and run the action in one go. See Acting without taking ownership.
- **Two people acting at once.** If someone else moved the request first, your action is refused and nothing is recorded. Reload and act again. See Concurrent actions.

Protected values and your account

- **Reveal an encrypted value** by selecting the eye next to `****` and proving it's you, once for that value. A lock means you don't have access. Every reveal is recorded. See Reveal an encrypted value.
- **Recovery codes** for when you lose your authenticator app. See Save your recovery codes.
- **See where you're signed in**, sign out a device, and check recent sign-ins. See Sessions & Sign-in Attempts.
- **Codes over WhatsApp**, where your organization offers it. See Codes over WhatsApp.
- **An index on User Preferences**, beside the page or in a drawer on a small screen. See User Preferences.

Notifications

- **Notifications forwarded from a colleague** who delegated work to you. See Forwarded notifications.
- **Notifications that open a page** when you select them. See Notifications that open a page.
- **Live notifications only for the space you're in**, so you don't get the same pop-up twice. See New notifications while you work.

Signing in

- **Straight to your outside account** when it's the only way in. See You went straight to your outside account.
- **A page that explains why the portal can't start**, with a **Retry** button. See When the portal can't start.
- **A clear "try again shortly"** while your organization is being restored or moved. See While your organization is being restored or moved.

Comments

- **A mention that can't be found reads "Unknown"**, and the record still opens. See How a mention is stored.
- **Comments from visitors who aren't signed in** show as *Anonymous* on a public record. See Comments & Collaboration.

On the mobile app

- **Grouping and totals** as on the web, on a table. A collapsed group hides its subtotal on the phone. See Grouping and totals on the phone.
- **Reveal an encrypted value** by tapping it.
- **Reset** on the **Background color**, **Border color** and **Tag** style chips of a list.

- **A description tooltip** next to an extra step added on the fly.
- **Duplicate** always shows its name.
- **Recovery codes** saved through your phone's own save dialog, passkeys showing when they were added and last used, and **Security** as a tab of the **User Center**. See Good to know.
- **Edit Basic Information** has its own form, which keeps your names in other languages. See Your profile and security on the phone.

Also new on older lines

These reached earlier releases as updates as well:

- **Since 1.4**: a **Cancel** link on the sign-in page (Cancel signing in), and requests you approved inside a longer route appearing under **Inbox** › **Completed** (Completed requests).
- **Since 1.6**: sign-in links that bring you back to the page you wanted (You followed a link to a page), and pickers that find a record or person by a name in any of your organization's languages (Picker search).
- **Since 1.8**: **Edit** on a request after its route has finished, for the owner of the last step (Working With Data), and buttons that wait until their job has finished (Buttons that run a job).

Account Security & Revealing Protected Values

> **Availability**
>
> **Since 1.8**: authenticator app, passkey management and revealing masked values. **Since 1.10**: recovery codes, sessions and sign-in attempts, verification codes over WhatsApp, and a verification step before an encrypted value is shown.

This page is for everyone with a portal account. It shows you how to protect your account with a second sign-in step, recovery codes and passkeys, how to see where you're signed in and sign out a device you don't recognize, and how to reveal a protected value when your organization has given you access to it. Each task works on the web and in the mobile app.

How to sign in, and what the sign-in screens look like, is in Signing In & Choosing a Space.

How it works

Your security settings are on one page:

- **On the web**, select your picture at the top of the page, then select **User Preferences**. Scroll to **Security** and **Logins**, or use the index beside the page (on a narrow screen, select **Show index**).
- **In the mobile app**, open the **User Center** and use its **Security** and **Logins** tabs.

Card	What you do there
Password	Change your password.
Two-factor authentication	Choose how you prove it's you after your password: an authenticator app, a text message, an email or WhatsApp. Manage your recovery codes.
Passkeys	Add or remove passkeys, which let you sign in with your face, fingerprint or device PIN instead of a password.
Sessions	See every device signed in to your account, and sign one out.
Attempts	See recent sign-ins to your account, including ones that failed.

Some values in records are **protected**. You see `****` instead of the value until you prove who you are:

- A **sensitive** value stays visible for a length of time you choose, then hides again.
- An **encrypted** value is shown one field at a time, and you prove who you are each time.

An example. Layla works in HR. On her first day she turns on the authenticator app and saves her recovery codes in her password manager. A month later she opens an employee record whose salary shows `****`. She selects the eye next to it, chooses **10 minutes**, types the code from her app, and the salary appears. When she's done, she selects **Disable unmask** in her profile menu so the values hide again straight away.

If your account comes from your organization's own sign-in system, such as your company's Microsoft account, you see the message **Two-factor authentication and passkeys for this account are managed by your organization's identity provider.** Set these up with your organization's IT team instead.

Your password

To change your password:

1. Open your security settings (see How it works).
2. On the **Password** card, select **Change Password**.
3. Enter your **Old Password**, then your new **Password**, and type it again in **Confirm Password**.
4. Select **Change Password**.

If you've forgotten your password, reset it from the sign-in page. See Forgot your password.

About reset links `Since 1.4`:

- **Only the newest link works.** If you ask for a reset again, the earlier link stops working. Asking again doesn't extend an old link.
- **A link lasts 24 hours** unless your organization has set another limit.
- **A link from before an upgrade may not work.** If your organization has upgraded since you received the link, request a new one.

Set up two-factor authentication

With two-factor authentication, signing in takes your password **and** a code. Someone who learns your password still can't get in.

The **Two-factor authentication** card lists the methods: **Authenticator app**, **Mobile MFA** (a code by text message), **Email MFA** (a code by email) and, where your organization offers it, **WhatsApp**. Your default method shows **Enabled since** and a date. The others show **Disabled**.

Text message and email codes go to the phone number and email address on your account. Your organization decides whether they're available. You can't remove them, but you can choose which method is your default.

Turn on the authenticator app `Since 1.8`

You need an authenticator app on your phone, such as Microsoft Authenticator or Google Authenticator.

1. On the **Two-factor authentication** card, select **Enable** next to **Authenticator app**.
2. Enter your password under **Confirm your password** and continue.
3. On **Set up your authenticator app**, scan the QR code with your app. If you can't scan it, select **Enter this key manually** and type the key into the app.
4. Type the 6-digit code your app now shows, and confirm.
5. Save your recovery codes (next section), then select **Done**.

The setup code is short-lived. If it runs out before you confirm, you start again with a new QR code. You didn't do anything wrong.

Save your recovery codes `Since 1.10`

When you turn on the authenticator app, you get **8 recovery codes** on the **Save your recovery codes** screen. If you lose your phone, you can sign in with one of them instead of a code from the app. Each code works once.

You see the codes **only once**. After that, the page only shows how many you have left.

1. Select **Copy Codes** or **Download** and keep them somewhere safe, such as a password manager. Don't keep them on the same phone as your authenticator app.
2. Tick **I have saved my recovery codes**.
3. Select **Done**.

To use one, choose **Recovery code** on the sign-in code page. See Confirm it's you.

Get a new set. If you've used most of your codes, or think someone has seen them:

1. On the **Two-factor authentication** card, select **Regenerate recovery codes**.
2. Confirm. Your current codes stop working as soon as you continue.
3. Prove it's you with a code from your authenticator app or your password.
4. Save the new codes as above.

If you turn off the authenticator app, your recovery codes are deleted too.

Choose your default method

Next to a method you can use, select **Set as default**. The sign-in code page opens on that method. You can still switch to another method there.

Turn off the authenticator app

1. On the **Two-factor authentication** card, select **Disable**.
2. Enter a current code from your authenticator app, **or** your password.
3. Confirm.

Codes over WhatsApp `Since 1.10`

If your organization has turned on WhatsApp for verification codes and your account has a verified phone number, you can get your codes by WhatsApp as well as by text message.

- **You'll be asked for a code when you sign in.** Once WhatsApp is offered to you, it counts as a second method, so signing in asks for a code even if it didn't before.
- **Make it your default** on the web: select **Set as default** on the **WhatsApp** row. The row only appears while your organization offers WhatsApp to you, or while it's already your default.
- **What you receive.** A WhatsApp message with your code from your organization's business number. The prompt says **Check your WhatsApp**.
- **Which method comes first.** Your default, if you've chosen one. If you haven't, and both text message and WhatsApp are offered, your organization's preferred one comes first. You can switch on the same screen.
- **On the mobile app** the **Security** tab doesn't list WhatsApp. Use the web to make it your default.

If the code doesn't arrive, select **Resend Code** or switch method. If WhatsApp codes never arrive, tell your administrator.

Passkeys

A passkey lets you sign in with your face, fingerprint, device PIN or a security key instead of typing a password. It can also act as your second step.

Add a passkey

1. On the **Passkeys** card, select **Add a passkey** (on the mobile app, **Add Passkey**).
2. Continue, and follow your device's prompt (Face ID, Touch ID, Windows Hello or your device PIN).
3. When you see **Passkey added successfully**, select **Done**.

Each passkey is listed with its name, the device it's on, when it was added and when it was last used (or **Never used**). Add one on each device you sign in from.

Remove a passkey

1. Select **Remove** next to it.
2. In **Revoke passkey?**, select **Revoke**.

That passkey can no longer sign in to your account. If it's your only passkey, you're warned first, because removing it changes how you sign in.

Sessions & Sign-in Attempts `Since 1.10`

Under **Logins** you can check who is using your account.

Sessions lists every device and browser signed in to your account now, with when it started and when it was last used. Your current one is marked **This device**.

To sign a device out:

1. Select **Remove** next to it.
2. In **Remove this session?**, confirm.

That device is signed out straight away and can't be used any more. If you remove your own session, you're signed out too.

Attempts is a history of sign-ins to your account from the last 60 days, newest first. Each row shows the device, the browser, the time and whether it succeeded or failed. Select **Load more** to see older ones. You can't change anything here: it's for checking.

If you see a sign-in that wasn't you, remove that session, change your password, and tell your administrator.

Reveal a masked value

A value marked **sensitive** shows as `****` wherever it appears: in lists, on the record, in exports and in history. If your organization has given you access to it, you can reveal it for a while. Your administrator decides who has access. Being able to open the record isn't enough.

1. Select the eye next to the masked value. (On the web you can also select your picture at the top of the page, then **Unmask**.)
2. Under **Expiry**, choose how long values should stay visible: **2**, **5**, **10** or **30 minutes**, or **1**, **3**, **4**, **6** or **8 hours**. Select **Next**.
3. Prove it's you. The dialog asks for whichever method suits your account, usually your default one:
    - For a text message, email or WhatsApp code, the dialog says where it sent the code, for example **Check your email**. Type the code under **Enter OTP**.
    - For the authenticator app, type the code your app shows.
    - Read the dialog for the code length. It isn't always 6 digits.

    - If you have no method set up, the dialog may ask for your password instead. See Password instead of a code.
4. Select **Verify**.

The values appear in place and stay visible until the time runs out. To hide them sooner, select your picture at the top of the page, then **Disable unmask**.

In the dialog you can also select **Resend code** (after a short wait) or **Use a different method**. You can't use a passkey to reveal values.

One reveal covers all your protected values. While it's on, every sensitive value you have access to is shown, not only the one you selected. Reveal values only when you need them, and end the reveal when you're done.

It ends by itself when you sign out, switch space, or start or stop acting for a colleague. On the mobile app, values hide again when you come back to the app, until the app has checked that your reveal is still on.

Password instead of a code

If your account has no way to receive a code, your organization may allow you to confirm with your password instead (your administrator turns on **Allow Password Step-Up** for this). You don't choose this. The dialog simply asks for your password under **Confirm your password**, with the message **No verification method is available, so confirm your account password to continue.** In that case there is no code to resend and no other method to pick.

When you can't reveal

- **No method set up.** The dialog says **No verification method is available for your account. Contact your administrator to enable one.** On the mobile app, where setting up a method yourself would help, the message offers **Set up a verification method**, which opens your security settings.
- **Your account comes from your organization's sign-in system.** These accounts can't reveal values this way. Ask your administrator.
- **A lock icon instead of an eye.** You don't have access to that value.

Too many attempts

If you type a wrong code or password too many times, or ask for codes too quickly, you're blocked for a while. The dialog says **Too many attempts. Unmasking is blocked for another** and how long. The limit belongs to your account, so opening another browser or device doesn't help. Wait, then try again.

Reveal an encrypted value

Some values are **encrypted**: the organization stores them scrambled, not just hidden on screen. They also show as `****`, but you reveal them one at a time, and you prove who you are every time.

1. **On the web**, select the eye next to the value (its tooltip says **Decrypt**). **On the mobile app**, tap the masked value itself.
2. In **Verify your identity**, prove it's you with a code or your password, in the same way as above.
3. The value appears in place.

Good to know:

- **Every reveal needs its own check.** A check covers one value only. Revealing a second value, or the same value again after you reload, asks again. If you don't finish within about two minutes, start again.

- **There is no timer.** The value stays visible while it's on your screen. When you leave the page, scroll it away or reload, it hides again.
- **You may see a lock instead of an eye.** That means you don't have access to that value, and there is nothing to select. Password fields never show an eye.
- **Every reveal is recorded.** Your administrators can see that you revealed a value, when, and which field. The value itself is never recorded.
- **If you cancel or the check fails,** the value stays hidden. Too many wrong codes block you for a while, as described in Too many attempts.

The same kind of check can also protect a workflow action. See Verifying your identity before an action runs.

Good to know

- **The web and the mobile app share your settings.** A method or passkey you set up on one is there on the other.
- **On the mobile app**, recovery codes open your phone's own save dialog when you select **Download**. You see **Download finished** or **Download failed**. Security is the middle tab of the **User Center** (**Profile**, **Security**, **Logins**), as it is on the web. Passkeys show when each was added and last used.
- **On the mobile app, a revealed value isn't protected from screenshots.** End the reveal before you show your screen to someone or hand over your phone.
- **Who can see a protected value** is decided by your administrator. See Sensitive-field grants [Administration › Sensitive Permissions].

Troubleshooting

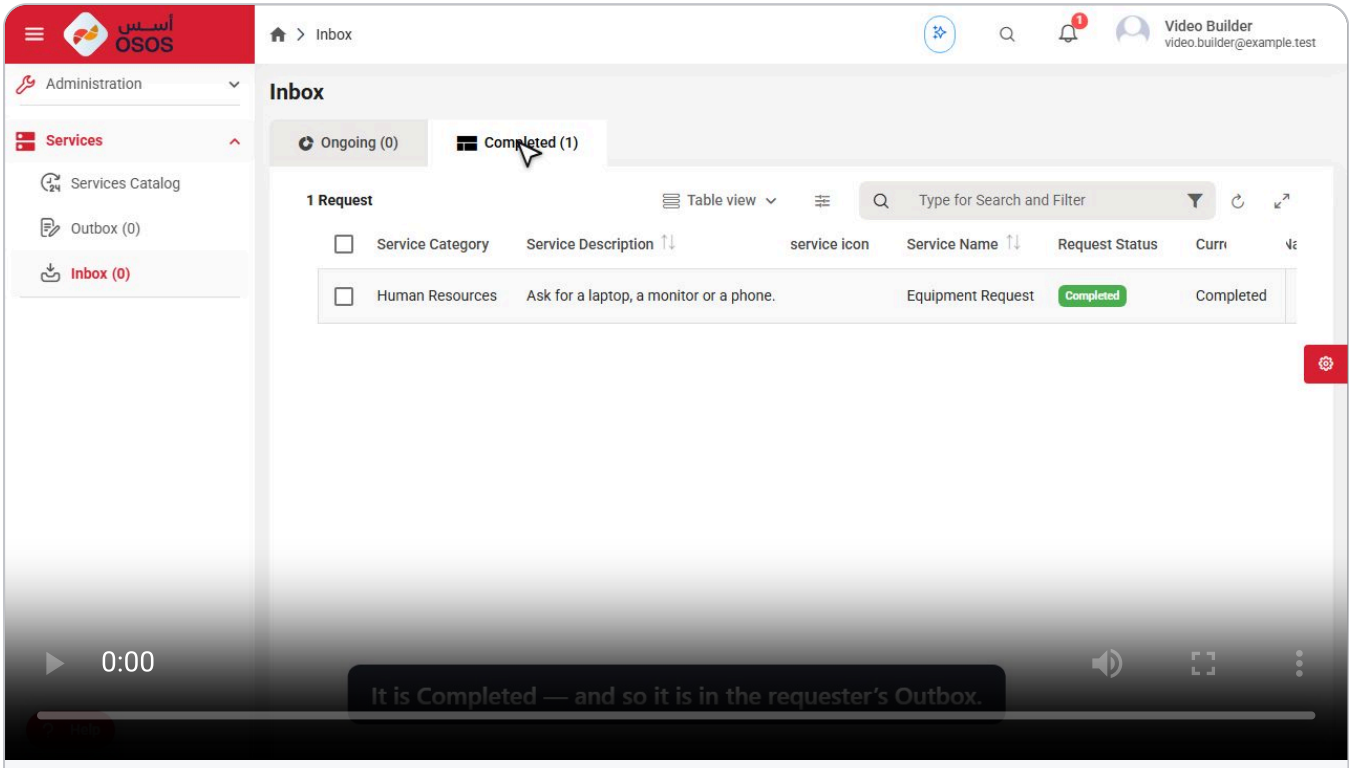
What you see	What to do
No **Two-factor authentication** or **Passkeys** card, but a message that they're managed by your organization	Your account comes from your organization's sign-in system. Ask your organization's IT team.
The QR code expired while you were setting up the app	Start again. You get a new QR code.
You lost your phone with the authenticator app	Sign in with a recovery code, then turn the app off and on again on your new phone. If you have no codes left, ask your administrator.
The eye isn't there, or there's a lock	You don't have access to that value. Ask your administrator.
The code you entered is incorrect.	Type it again. For an authenticator app, use the code showing now.
This code has expired. Request a new one.	Select **Resend code**.
You have used all attempts for this code. Request a new one to continue.	Select **Resend code**.
A value is still `****` after you revealed	You don't have access to that field. Reveal only shows values you've been given access to.

Go deeper

For integrators: Account security and step-up (internals) [Integrate & Extend] · For operators: Second factors, codes and passkeys

Submit & Track a Request

Use this recipe to send a request, such as a leave request, and follow it until it's done. For more detail on each step, see Services & Submitting Requests.



HOW-TO **A request, there and back**

Submit it, approve it from the Inbox, see it completed · 0:47 · Recorded on OSOS 1.11.0-alpha.1

Before you start

- You need to be signed in to the portal.
- You can only submit services that have been published to you. If the one you need is missing, ask your administrator. See Why a service may be missing.

Submit a request

1. In the sidebar, open **Services**, then select **Services Catalog**.
2. Search for the service, for example *leave*, and select it.
3. Read the description so you know what you'll be asked for, then select **New Request**.
4. Fill in the form. Some fields may be filled in for you, and the form flags mistakes as you type.
5. Select **Save**, then confirm with **Save Changes**.
6. Open the request if it isn't already open, select the action button for the first step (for example **Submit**) and confirm.

To stop halfway and finish later, use **Save as Draft** in the menu next to **Save**, if the service offers it. See Save a draft and finish later.

Track it

1. In the sidebar, open **Services** › **Outbox**.
2. Find your request on the **Ongoing** tab and read its **Request Status**: **On Going** means it's with someone else, and **Pending Your Action** means it's waiting for you. See What each status means.
3. Open the request to see its history, comments and related emails.

The list updates by itself as people act on your request. When the request finishes, it moves to the **Completed** tab.

If it comes back to you

When an approver returns your request, you get an **Action Required** notification and the request shows **Pending Your Action** in your **Outbox**. It won't appear in your **Inbox**.

1. Open the request from **Outbox** › **Ongoing** and read the approver's note.
2. Select **Edit Entry**, make the changes and select **Save**.
3. Select the step's action button, for example **Resubmit**, and confirm.

The full steps are in Fix a request that was sent back to you.

Related

- Act on requests waiting for you (Inbox)
- Executing Workflow Actions
- Receiving Notifications

Video script: Submit & Track a Request

> ⚠ **This video hasn't been recorded yet**
>
> This page is the **script** the recording team will use. There is no video here yet. To submit and follow a request now, use the written steps in Submit & Track a Request.

For the recording team. Record the flow from the point of view of an employee who submits a request and follows it. Sign in as an ordinary user with no administration rights, in a space with at least one published service that has two steps, so the request can be sent back once. Read the **Narration** column aloud while you perform the **On screen** column. Target length: about two minutes. When the video exists, embed it in the written how-to and retire this page.

Storyboard

Scene	On screen	Narration	Time
1. Intro	The portal, just after signing in.	"Let's send a request and follow it until it's done."	8 s
2. Find the service	In the sidebar, open **Services** › **Services Catalog** and type *leave* in the search box.	"All the services you can use are in the Services Catalog. Search for the one you need."	10 s
3. Open the service	Select the service. Point at its description and help.	"The service page tells you what you'll be asked for."	10 s
4. Start the request	On the service page, select **New Request**. (On the catalog's card the same button is **Apply**; this script goes through the service page.)	"Select New Request to open the form."	6 s
5. Fill in the form	Fill in the required fields. Point at a field that is already filled in, and at a field the form flags as you type.	"Some fields are filled in for you, and the form checks your answers as you type."	14 s
6. Save	Select **Save**, then **Save Changes**.	"Save the request."	6 s
7. Send it on	Select the first step's action button, for example **Submit**, and confirm.	"Saving keeps it as a draft. Send it on with the step's button, here Submit."	10 s
8. Track it	Open **Services** › **Outbox**. On **Ongoing**, point at the request's **Request Status**: **On Going**.	"Your Outbox shows every request you sent and where it stands."	12 s
9. Read the details	Open the request. Show the **WorkFlow** tab, then the **Discussion** tab.	"Open a request to see its route, its history and its comments."	10 s
10. Sent back	(Prepared in advance: the approver returned the request with a note.) Show the **Action Required** notification under the bell, then the request in **Outbox** marked **Pending Your Action**.	"If the approver sends it back, you're notified, and it's waiting for you in your Outbox, not your Inbox."	14 s
11. Fix and resend	Read the note, select **Edit Entry**, correct a field, **Save**, then select the step's action button, for example **Resubmit**.	"Read the note, fix what's needed, and send it back."	12 s
12. Done	Show the request on the **Completed** tab of the **Outbox**.	"When the route ends, the request moves to Completed. That's it."	8 s

Labels used in this script

The labels come from the English portal. Check them against the build you record on, because a service's step buttons, such as **Submit** and **Resubmit**, are named by the person who designed that service.

Where	Label
Sidebar	**Services**, **Services Catalog**, **Outbox**, **Inbox**
Services Catalog card	**Apply**
Service page	**New Request**
Request form	**Save**, **Save Changes**, **Edit Entry**
Lists	**Ongoing**, **Completed**, **Request Status**
Statuses	**On Going**, **Pending Your Action**, **Completed**
Request side panel	**WorkFlow**, **Discussion**
Notifications	**Action Required**

Questions from people using the portal

This page is for anyone who uses the OSOS portal or mobile app at work. Each answer is short and points you to the page with the full steps. Questions about managing users, permissions and settings are in the Administration FAQ [Administration].

Getting started

What is OSOS?

OSOS is a platform your organization uses to build its own web and mobile applications without writing code: forms, records, requests and the approval routes behind them, such as HR, project, document or service systems. Its name refers to the foundation it gives an organization's digital services. It is about 97% no-code; small expressions are used only in a few specific cases. See Overview [General].

Do I need to build anything to use the portal?

No. People in your organization build the applications, and you work inside them: you fill in forms, browse records, submit requests and approve the ones sent to you. What you see depends on your access, so a colleague's portal can look different from yours. See Using the platform.

What is a space, and how do I switch between spaces?

A space is your organization's own area of the platform, with its own address, data and people. If you belong to more than one, open the space list at the top of the sidebar and select another space. The portal then opens that space's address. If you belong to only one space, there is no list. See Signing In & Choosing a Space.

I followed a link and had to sign in first. Will I lose my place?

No. After you sign in, the portal takes you to the page the link pointed to. See Signing In & Choosing a Space.

What happens the first time I sign in?

You see a welcome page. Select **START USING** followed by your organization's name to go into the portal. Your organization may also start a short guided tour. You see the welcome page only once. See Signing In & Choosing a Space.

Signing in and your account

Can I sign in without a password?

Yes, if your organization allows passkeys. A passkey uses your device's fingerprint, face or PIN, or a security key. After you sign in with a password, the portal may offer to set one up. See Account Security.

Why am I asked for a code after my password?

Your organization uses two-factor authentication, or you turned it on. Enter the code from your authenticator app, or the one sent to you by text message, email or WhatsApp. If a code doesn't arrive, select **Resend** or choose another method. See Signing In & Choosing a Space and Account Security.

Can I get my codes over WhatsApp? `Since 1.10`

Only if your organization turned WhatsApp on and your account has a verified phone number. WhatsApp then appears as one more way to get a code, and you can make it your default in the security area of your profile on the web. See Account Security.

Why did my password-reset link stop working?

Only the newest link works. Asking for another reset replaces the earlier link, and each link expires after a while (24 hours unless your organization changed it). Ask for a new link and use the most recent email. See Account Security.

Sign-in briefly pauses, or the portal says it can’t start. What should I do?

A short pause is a background check that you’re a real person. There is nothing to click. If the portal shows a page saying it can’t start, or that your organization is being restored or moved, wait a few minutes and try again. If it keeps happening, contact your support team and quote the details on the page. See Signing In & Choosing a Space.

Finding your way

Why does my sidebar look different from a colleague’s?

The sidebar only shows what you’re allowed to open, in the space you’re in. While you act for a colleague, it shows only what they delegated to you. See Portal Layout & Navigation.

How do I search the whole portal?

Select the search icon in the top bar, or press **Ctrl + F** or **F3**. On the mobile app, the menu has its own search. See Portal Layout & Navigation.

How do I change the language, theme or date format?

Select the gear button at the edge of the screen to open **Quick Settings**. There you choose the theme, light or dark mode, the text size, the language (Arabic switches the layout to right to left), your time zone and date formats. You can save them to your account so they follow you on every device. See Portal Layout & Navigation.

How do I act for a colleague who delegated work to me?

Open your profile menu, select **Delegations** and choose the colleague. While you act for them, the top bar shows their name and a button to go back to being yourself. See Portal Layout & Navigation and Acting on Workflow Steps.

Records

How do I add a record?

Open the list, select the button to add a record, fill in the form and save. If there is no such button, this list’s page doesn’t let you add records. You can’t save until the required fields are filled in. See Create and Edit Records.

Can I save a record and finish it later?

Yes, if the page allows drafts. Save it as a draft: only you can see it, and you can come back to it from the list’s drafts. See Create and Edit Records.

Why does a field show `****`, and how do I see the value?

The value is protected. If your administrator gave you access to it, select the eye next to it, choose how long it should stay visible, confirm it's you with a code, and select **Verify**. A lock instead of an eye means you don't have access. See Account Security & Revealing Protected Values.

Saving says "This record has changed". What do I do?

Someone else saved the record after you opened it. Select **Reload**, then make your change again on top of theirs. You can't overwrite their version from this message. See Create and Edit Records.

A file I attached says it has expired. What happened?

A file you attach is kept only when you save. If the form stayed open too long, the file expired before you saved. Attach it again, then save. See Create and Edit Records.

Why can't I add new records? `Since 1.10`

Your organization may have reached its plan's records limit. You can still open, edit and export records. Freeing room or changing the plan is your administrator's decision, so ask them. See When your organization's record limit is reached.

Why is a picker empty when I try to choose a person or record?

You may not have access to the records it offers, or there are no active records to choose from. Ask your administrator if you expected to see some. See Create and Edit Records.

What's the difference between archiving and deleting?

Archiving hides a record from the normal lists but keeps it, so it can be restored. Permanent deletion removes it for good, is usually kept for administrators, and isn't possible while other records still point to it. See Archive and Restore Records.

How do I see archived records?

Use the list's status filter to switch to archived records. If the filter isn't there, this list's page doesn't show archived records. See Archive and Restore Records.

Lists, search and export

How do I show a list as cards, a board or a calendar?

If the list offers more than one display, choose another one from the list's toolbar. Your search and filters carry over. Some displays aren't available on the mobile app. See Browse a List and Change How It Looks.

How do I filter a list or search it?

Type in the list's search box to find records by their text, or open the filter to set conditions such as *Status is Open*. You can also use the quick filters the list offers. See Search, Filter, Sort and Group a List.

Why doesn't a record I just added show up in search?

Search catches up a moment after a record is added or changed. Wait a few seconds and search again. See Search, Filter, Sort and Group a List.

Can I save a filter and use it again?

Yes, if the list allows it. Save your filter under a name, and choose whether only you or others can use it. See Make a View Your Own.

How do I keep a hand-picked set of records together?

Make a list: select the records and add them to a new or existing list. A list keeps exactly the records you added, and you can share it with colleagues who can open the same page. See Lists: Keep Records Together.

Why don't the group subtotals add up to the grand total?

The grand total covers every record your filters match, not only the ones on screen. Adding up subtotals works for sums but not for averages. A total of `****` means the figure is hidden from you; `-` means there was nothing to total. See Search, Filter, Sort and Group a List.

How do I export a list to Excel or CSV?

If the list allows it, select **Export Entries** in its toolbar and choose Excel or CSV. Large exports arrive later, with a notification when the file is ready. Exports don't include group totals. See Export a List.

Can I get a PDF?

Yes, from a report: open it and select **Export to PDF**. Some pages also offer print templates that can produce a PDF. Reports work on the web only. See Dashboards, Counters & Reports.

Are protected values included when I export?

Only if you're allowed to see them. Otherwise they show as `****` in the file, as they do on screen. See Export a List.

Requests and approvals

Why don't I see a service I need?

It isn't published to you, it's meant only for visitors who aren't signed in, or it's switched off. There is no button to ask for access. Ask the service owner or your administrator. See Services & Submitting Requests.

Where do I find my requests?

In the sidebar, open **Services** › **Outbox**. Requests still moving are on **Ongoing**, finished ones on **Completed**. The **Request Status** column shows where each one stands. See Services & Submitting Requests.

My request was sent back to me. How do I fix it?

Open **Services** › **Outbox** › **Ongoing**. The request shows **Pending Your Action**. Open it, read the note, select **Edit Entry**, make the change, save, and send it back with the step's button, such as **Resubmit**. It never appears in your **Inbox**. See Fix a request that was sent back to you.

Can I submit a request without signing in?

Only on a public form your organization published. Open its link, fill it in and submit. Some public forms run a short background check; if the form refuses to submit, wait a little and try again. See Services & Submitting Requests.

How do I approve or return a request sent to me?

Open **Services** › **Inbox**, open the request, and select the action, such as **Approve**, **Return** or **Reject**. Add a note if asked, and confirm. See Acting on Workflow Steps.

Why are there no action buttons on a request?

The current step isn't yours. Open the **WorkFlow** tab to see who has it. If you see **Take Ownership**, the step belongs to your group: take it first. See Acting on Workflow Steps.

My action was refused with "This record has changed". What happened? `Since 1.10`

Someone acted on the request, or changed its owner, after you opened it. Nothing was recorded. Select **Reload**, check where it stands, and act again if it's still yours. See Acting on Workflow Steps.

Can I approve many requests at once?

Yes. Select them in the list and choose the action. They must all be on the same step. If the action asks you to confirm it's you, you confirm once for all of them. See Acting on Workflow Steps.

Can I pass a step to a colleague or ask someone else to approve too?

Yes, if the step allows it. Use **Reassign Owner** to hand the step over, or **Add ad hoc step** to bring in an extra approver before you continue. Look under **More** if you don't see them. See Acting on Workflow Steps.

A step sent me to another website. What do I do? `Since 1.8`

That step is completed in an outside system, such as an e-signature or payment page. Finish there and you are brought back. If your browser blocked the window, allow pop-ups and select **Retry**. See Complete a step in another system.

Comments and collaboration

How do I comment on a record and mention someone?

Open the record and select the **Discussion** tab. Type in **Write your comment**, type **@** and pick a person or group to mention them, then send. They get a notification. See Comments & Collaboration.

Can I edit or delete a comment?

You can change who your own comment is addressed to, but not its text. There is no button to delete a comment. See Comments & Collaboration.

What files can I attach to a comment?

Each page sets the file types and size it accepts, usually up to about 1 MB per file. Point at the attach button to see the limits. See Comments & Collaboration.

Notifications and the mobile app

How do I read my notifications?

Select the bell at the top of the portal. The number shows how many you haven't read. Select a notification to open what it's about; it's then marked as read. There is no "mark all as read". See Receiving Notifications.

Why am I getting notifications meant for a colleague? `Since 1.10`

They delegated work to you and chose to forward their notifications or emails. You get copies while the delegation lasts. Opening one switches you to acting for them. See Receiving Notifications.

Can I choose which notifications I get?

Not yourself. You get every notification your organization sets up for you, and emails and text messages go to the contact details on your profile. Phone pop-ups depend on whether you allowed the app to notify you. Ask your administrator if you get too many or too few. See Receiving Notifications.

What can I do on the mobile app?

Almost everything you do day to day: submit and follow requests, approve steps, browse and edit records, filter, read dashboards and counters, and comment. Reports, calls on a record and building applications are web only. The app adds face or fingerprint unlock, phone notifications and barcode scanning. See Web vs Mobile.

Can I use the same account on several devices?

Yes. You can be signed in on the web and on your phone at the same time, and on more than one device. See Web vs Mobile.

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