

# User Management and Licensing

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### Overview

As an administrator of your FormAssembly instance, you can add, deactivate, restore, or edit users. You are also able to set and refine the permissions available to your users.

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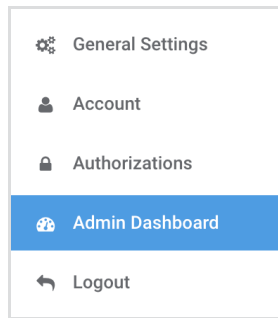
## Requirements

- Must be part of an Essentials plan or above.
- Administration permissions must be enabled for your user account.

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## Accessing the Admin Dashboard

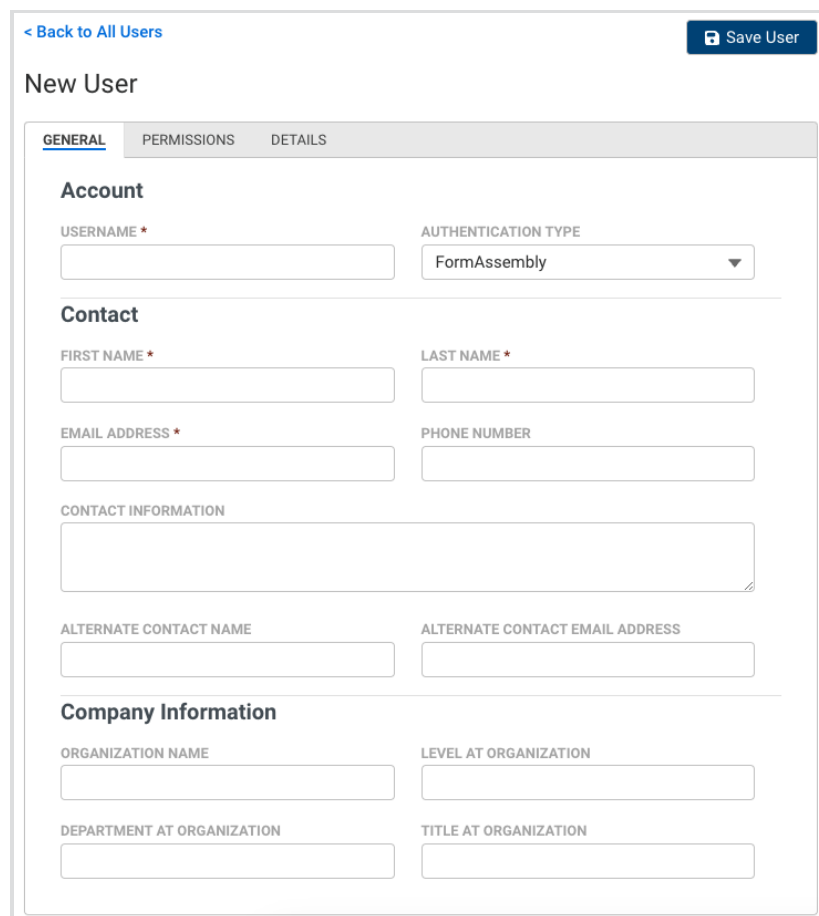
To perform the tasks below, you will need access to the Admin Dashboard. This can be found by going to the dropdown menu next to your name, at the top of the FormAssembly app. From here, you'll be able to select "Admin Dashboard".



A vertical menu with five items: 'General Settings' with a gear icon, 'Account' with a person icon, 'Authorizations' with a lock icon, 'Admin Dashboard' with a dashboard icon and a blue background, and 'Logout' with a back arrow icon.

## Adding a User

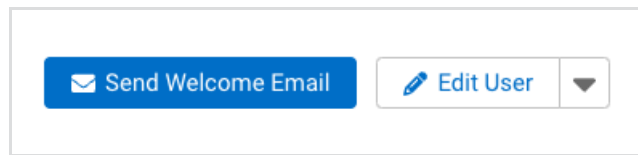
1. Browse to: **Admin Dashboard | Users**
2. Click **Add New User** on the left side menu.



The 'New User' form is displayed with a '< Back to All Users' link at the top left and a 'Save User' button at the top right. The form has three tabs: 'GENERAL' (selected), 'PERMISSIONS', and 'DETAILS'. The 'GENERAL' tab contains several sections: 'Account' with 'USERNAME \*' and 'AUTHENTICATION TYPE' (set to 'FormAssembly'); 'Contact' with 'FIRST NAME \*', 'LAST NAME \*', 'EMAIL ADDRESS \*', and 'PHONE NUMBER'; 'CONTACT INFORMATION' with a large text area; 'ALTERNATE CONTACT NAME' and 'ALTERNATE CONTACT EMAIL ADDRESS'; and 'Company Information' with 'ORGANIZATION NAME', 'LEVEL AT ORGANIZATION', 'DEPARTMENT AT ORGANIZATION', and 'TITLE AT ORGANIZATION'.

3. Set the Authentication Type to **FormAssembly**.
  - A local database setting indicates that passwords are stored locally and the application authenticates users directly.
  - If you would like to use SSO as your Authentication Type, please note that your FormAssembly username should match your SAML or Salesforce username.

4. Fill in the **Contact** and **Company Information** sections.
5. Open the **Permissions** tab to add user permissions. To learn more, continue to the User Permissions section below.
6. Click **Save User** at the top of the page, to finalize user creation.



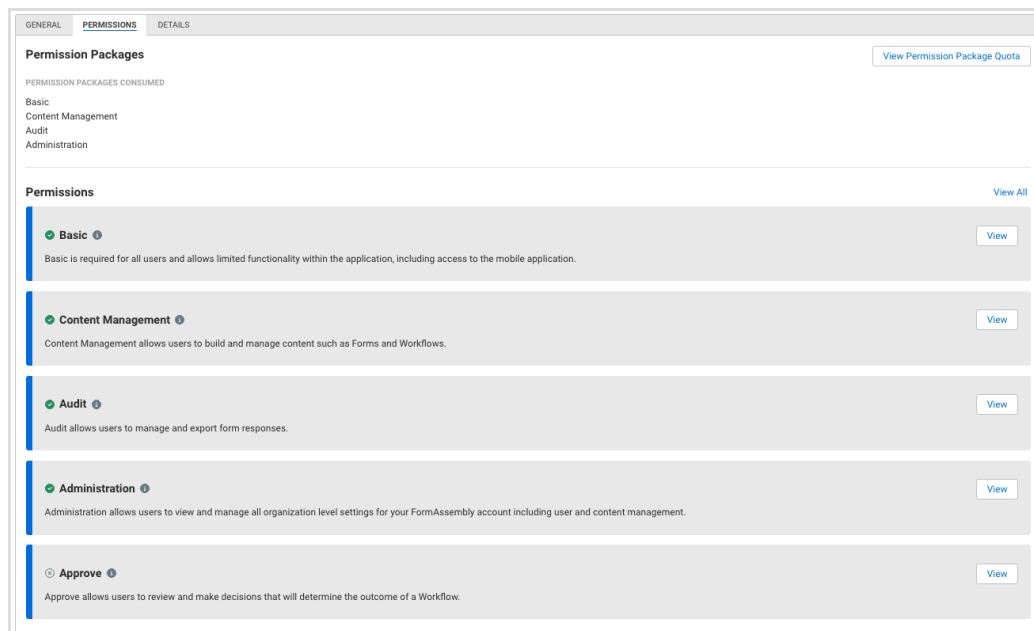
7. After the page refreshes, click **Send Welcome Email**, to send an email to the user allowing them to create a password for their account. Once completed the user can use the application immediately.

**Note:** The link within the welcome email expires after 72 hours. Click **Send Welcome Email** again to send a new email to the user, or instruct the user to select "**Forgot Password**" on the login page.

## User Permissions

To add, remove, or edit user permissions, follow these steps.

1. Open **Admin Dashboard | Users** to begin.
2. Locate the user within the **All Users** list.
3. Select the user and navigate to the **Permissions** tab.



4. The **Permissions** tab displays each of the available **Permission Packages**. You can apply any Permission Packages with an available quota to the user.
5. Once you have selected the Permission Packages that will apply to the user, you can expand

them further by clicking **View**. This will expand the list of available permissions for fine-tuning, grouped by **Permission Sets**.

☒ **Basic** ⓘ

Close ^

Basic is required for all users and allows limited functionality within the application, including access to the mobile application. **6792 Available**

☒ **GENERAL PERMISSIONS**

☒ Access shared forms

☐ **Content Management** ⓘ

Close ^

Content Management allows users to build and manage content such as Forms and Workflows. **809 Available**

☐ **FORM PERMISSIONS**

☐ Use Upload Fields in Forms  
☐ Add HTML Code to Form  
☐ Add custom code to form  
☐ Can use CSV datasets  
☐ Use Captchas (spam protection)  
☐ Enable 'Save and Resume' option  
☐ Enable 'Review before submit' option  
☐ Create and modify forms  
☐ Import images in form  
☐ Can require authentication on forms  
☐ Enable E-Signature on forms  
☐ Can use and create public datasets

☐ **CONNECTORS**

☐ CAS (Prefill)  
☐ LDAP (Prefill)  
☐ SAML (Prefill)  
☐ Google Sheets 2  
☐ HTTPS  
☐ Post Redirect

☐ **BRANDING PERMISSIONS**

☐ Can customize themes  
☐ Can create themes  
☐ Custom form branding

☐ **SENSITIVE DATA**

☐ Mark fields as containing payment information in form builder  
☐ Mark fields as general sensitive data in Form Builder  
☐ Mark fields as personally identifiable information in Form Builder

☐ **PROCESSING PERMISSIONS**

☐ Setup Email Notifications  
☐ Customize email notifications  
☐ Use Auto-Responder  
☐ Edit Form Properties  
☐ Can use formulas  
☐ Allow form processing on forms created by this user  
☐ Can set purge settings for responses

☐ **COLLABORATION PERMISSIONS**

☐ Share own forms with other users  
☐ Lookup user list when assigning permissions  
☐ Can share form in the template library

☐ **PUBLISHING PERMISSIONS**

☐ Must request publishing approval  
☐ Can grant publishing approval  
☐ Can use advanced publishing tools

Premium Add-Ons

☐ **SALESFORCE INTEGRATIONS**

☐ Salesforce (Prefill)  
☐ Salesforce Marketing Cloud (Prefill)  
☐ Salesforce  
☐ Salesforce Marketing Cloud  
☐ Salesforce Dynamic Picklists

☐ **PAYMENT INTEGRATIONS**

☐ Authorize.net  
☐ Chargent  
☐ CyberSource  
☐ Freshbooks  
☐ IATS  
☐ PayPal  
☐ Stripe

☐ **Audit** ⓘ
 Close ^

Audit allows users to manage and export form responses.
 5801 Available

☐ **AUDIT PERMISSIONS**

- ☐ Allow user to perform searches over their response data
- ☐ Edit submitted responses
- ☐ Allow user to (re)index form responses for search manually
- ☐ Use RSS Feed
- ☐ View Charts
- ☐ Export Submitted Data
- ☐ View Form Analytics

☐ **VIEW SENSITIVE DATA**

- ☐ View fields containing payment information in responses and reports
- ☐ View general sensitive data in responses and reports
- ☐ View personally identifiable information in responses and reports

☐ **Administration** ⓘ
 Close ^

Administration allows users to view and manage all organization level settings for your FormAssembly account including user and content management.
 821 Available

☐ **ADMIN PERMISSIONS**

- ☐ Administrator access
- ☐ Can manage users
- ☐ Can manage user groups
- ☐ Allow administrator to access security settings
- ☐ Allow administrator to access user's data
- ☐ Allow administrator to assign admin permissions and edit admin users
- ☐ Can manage multi-factor authentication
- ☐ Force use of multi-factor authentication
- ☐ Allow administrator to reassign a form to another user (including oneself)
- ☐ Can manage purge settings and logs
- ☐ Can manage form identity providers

☐ **Approve** ⓘ
 Close ^

Approve allows users to review and make decisions that will determine the outcome of a Workflow.
 4987 Available

☐ **APPROVE PERMISSIONS**

- ☐ Can be assigned as an Approver
- ☐ Can manually override an Approval

6. Selecting the checkbox on a Permission Package will also apply all related permissions to the user. You can then uncheck any permissions you would like to remove.

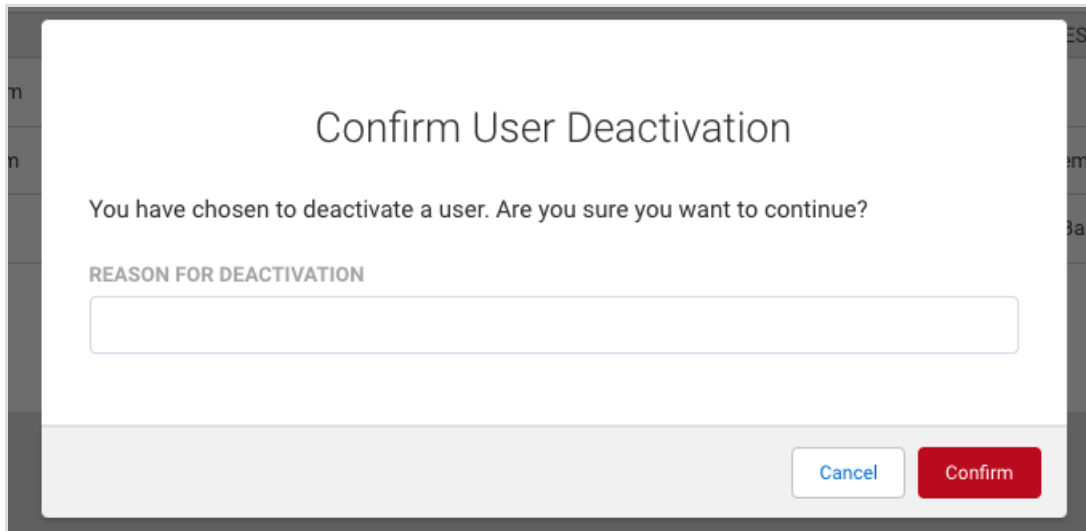
## Deactivating a User

### Note:

- Forms belonging to a deactivated user will no longer be available, and the application will no longer accept response submissions for those forms. You must move the forms to another active user before deactivating the owner.

- A deactivated user may no longer log in and access their data.

1. Browse to: **Admin Dashboard | Users**
2. Locate the user you want to delete from the list or through the Search.
3. From the **View User** drop-down menu in the Actions column, select **Deactivate User**. This opens the **Confirm User Deactivation** modal.

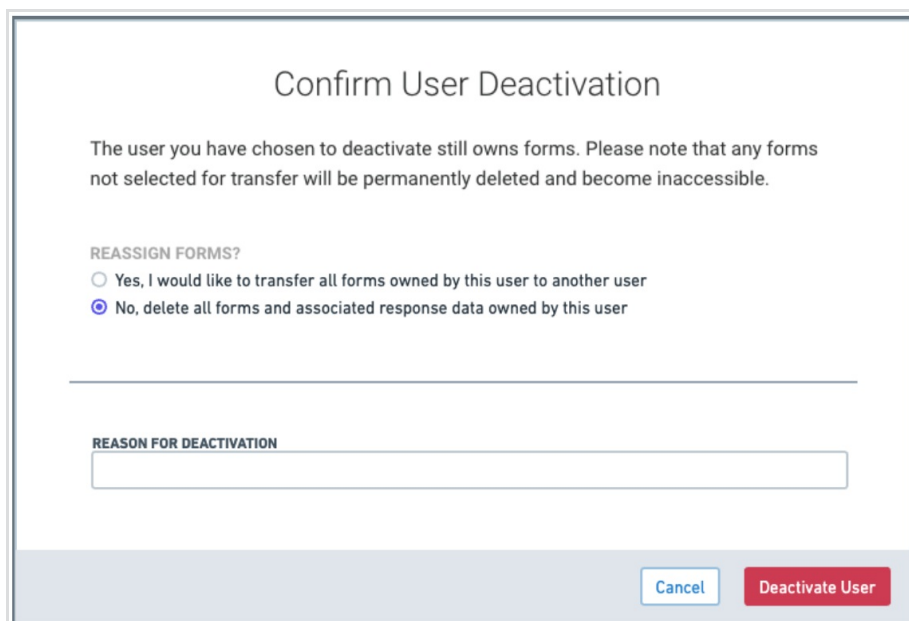
A modal window titled "Confirm User Deactivation". The text inside says "You have chosen to deactivate a user. Are you sure you want to continue?". Below this is a label "REASON FOR DEACTIVATION" followed by a text input field. At the bottom right are two buttons: "Cancel" (light blue) and "Confirm" (red).

4. If the selected user does not own a form, enter a reason for the deactivation and click **Confirm**.

## If the selected user is a form owner, select whether to transfer the user's forms to another user.

**Note:** Forms belonging to a deactivated user will no longer be available, and the application will no longer accept response submissions for those forms. You must move the forms to another active user before deactivating the owner.

### Option 1 - Don't Transfer Any Forms

A modal window titled "Confirm User Deactivation". The text inside says "The user you have chosen to deactivate still owns forms. Please note that any forms not selected for transfer will be permanently deleted and become inaccessible." Below this is a label "REASSIGN FORMS?" followed by two radio button options: "Yes, I would like to transfer all forms owned by this user to another user" and "No, delete all forms and associated response data owned by this user". The second option is selected. Below the radio buttons is a horizontal line. Below the line is a label "REASON FOR DEACTIVATION" followed by a text input field. At the bottom right are two buttons: "Cancel" (light blue) and "Deactivate User" (red).

- Select “**No, delete all forms and associated response data owned by this user**”.
- Enter a reason for the deactivation and click **Confirm** to complete the user deactivation.

## Option 2 - Bulk Transfer Forms to a New Owner

**Note:** This bulk transfer process transfers all forms from one user being deactivated to another user. You cannot pick and choose forms to transfer or divide ownership among several new owners using this method. If you would like to transfer ownership more granularly, please see the [Form Administration](#) article.

**Confirm User Deactivation**

The user you have chosen to deactivate still owns forms. Please note that any forms not selected for transfer will be permanently deleted and become inaccessible.

**REASSIGN FORMS?**

☒ Yes, I would like to transfer all forms owned by this user to another user

☐ No, delete all forms and associated response data owned by this user

**TRANSFER FORM OWNERSHIP TO THIS USER \***

🔍 Please Select ▼

**REASON FOR DEACTIVATION**

**Cancel** **Confirm**

- Select “**Yes, I would like to transfer all forms owned by this user to another user**”.
- Select a new owner from the **TRANSFER FORM OWNERSHIP TO THIS USER** menu.
- Enter a reason for the deactivation and click **Confirm** to complete the form transfer and user deactivation.

## Editing a User

1. Browse to: **Admin Dashboard | Users**
2. Select the user you want to edit from the list or through the Search.
3. Click **Edit** and proceed to make any necessary changes.
4. Click **Apply** when finished.

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## Restoring a User

1. Locate the user on the **All Users** page.
2. Click on the Username or select the **Edit** button for the desired user.
3. In the **Details** tab, click the **Reactivate User** link.

Once the account is reactivated, all forms and all previously received responses will become available again.

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## Changing/Replacing an Account Admin

If you need to change the admin listed on your account, you can edit your existing admin's information to update it. All FormAssembly forms will then be under the new admin's account. Please make sure that your new admin has access to your FormAssembly account before leaving your organization or changing roles.

You will also need to contact your Customer Success Manager so that we can update your account information in our customer database.

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