Form Administration

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Overview

As an administrator of an Essentials plan or higher, you have control over your users' forms.

Search for a Form

You can search for a specific form by navigating to **Admin Dashboard | Forms | All Forms**.

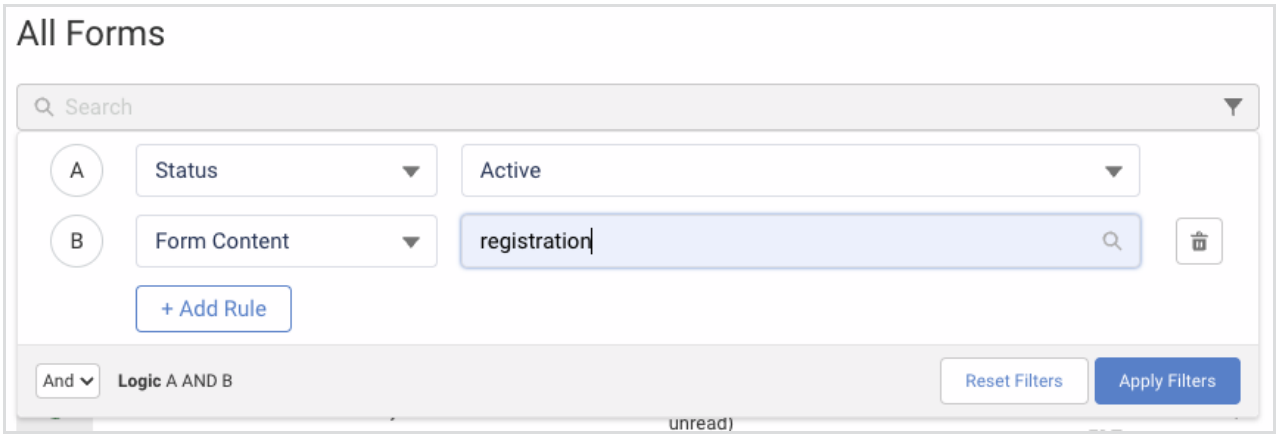


You can search for a form by the Form ID, Form Name, Form Content, Form Owner (username), Email (of the owner), User ID (of the owner), Form Spam Filter, Builder Version, and Status.

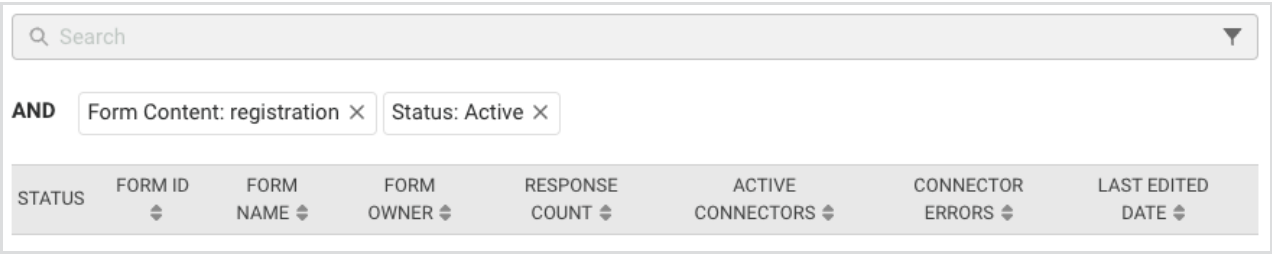
If you choose to search by form content, this will search all field labels, all HTML content, and all text content.

Refine Searches with Filters

If you choose to search by status, you can filter by "Active", "Archived", or “Deleted” status.



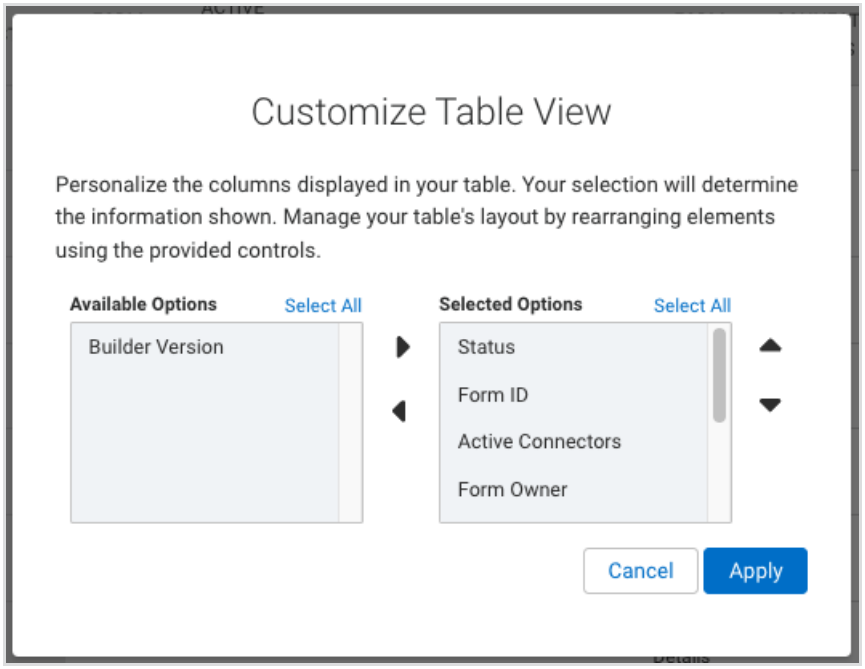
These search options can be applied as Filters and combined with either ‘AND’ or ‘OR’ logic to further refine your search queries. To apply filters, select the Filter (funnel) button within the search bar and configure your choices.



Customize the All Forms Table

The All Forms table can be sorted by each column using the arrow icons next to each column header (Form ID, Form Name, Form Owner, Response Count, Active Connectors, Connector Errors, and Last Edited Date).

To customize the columns displayed on the All Forms table, select the **Customize Table Columns** button, and move options between the Available Options and Selected Options columns. If there are fewer than two options in the Selected Options column, the Apply button will be disabled. Reorder the columns with the up and down arrow buttons.



Click **Apply** to finalize your selections or **Cancel** to abort. The customized view is retained and does not need to be reconfigured the next time you log in. Each user's customized view is their own and does not impact any other user on the instance.

Note: The Connector Errors column displays a count of connector errors for form responses within the last 7 days. This count only includes errors for connectors that are **active**.

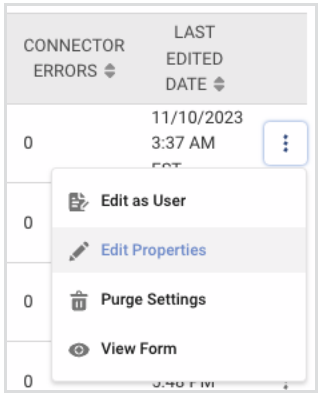
Download the All Forms Table

Select the **Export as CSV** (download) button to download the All Forms table as a .csv. Any filters, searches, or sorts applied to the table are reflected in the download; however, column customizations are not, so all columns are included in the download.

Change Form Owner

You may transfer the ownership of a form to another user. This is useful when a user is leaving the organization or when the creator won't be maintaining the form. To change ownership of a form:

1. Look up the User ID of the new owner with the **User** tab search
2. Look up the Form ID of the form you'll be transferring, under the **All Forms** search
3. Browse to: **Admin Dashboard | Forms | All Forms**
4. Search for the Form ID you found above
5. Click the vertical ellipsis on the right to select **Edit Properties**

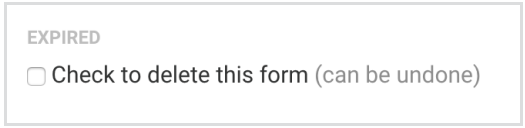


6. Select the new owner's User ID (step 1) from the **Owner Username** dropdown menu
7. Click **Apply**

Delete Forms

To delete a form:

1. Browse to: **Admin Dashboard | Forms | All Forms**
2. Search for the form you want to delete
3. Click the vertical ellipsis on the right to go to **Edit Properties**
4. Under **Expired,** check the "**Check to delete this form**" box



5. Click **Apply**

You can undo this action and restore a form. See below for details.

Restore a Form

To restore a form:

1. Browse to: **Admin Dashboard | Forms | All Forms**

2. Search for the form you want to restore
3. Click the vertical ellipsis on the right to go to **Edit Properties**
4. Under **Expired,** uncheck the "**Check to delete this form"** box
5. Click **Apply**

The form will become available again, and the collected data will be restored.

Preview Forms

You can preview forms that you have selected to be templates.

- Browse to: **Admin Dashboard | Templates**
- Click on the **Preview** button next to the form.

Forms will not submit a response from this page.

Edit Properties Options

Here's an overview of what you can **change** as an administrator on the **Edit Properties** page:

- Change Form Name
- Update Moderation Status
- Change Form Language
- Update Status
- Enable/Disable SSL
- Enable/Disable Captcha
- Enable/Disable Save & Resume
- Enable/Disable Confirmation Page
- List as a Template
- Set Category and/or Subcategory
- Change Form Owner
- Delete and Restore Form

You may **view** the form's version number, the date of creation, and the last modified date.

Changing Form and Workflow Ownership as a User without Administration Permissions

Any user account that is an owner of a form and has the permission "Share own forms with other users" enabled may transfer ownership of their form to any other user account within their FormAssembly instance without administrative restrictions. This means a form ownership transfer no longer needs to be completed by an admin, freeing administrators to focus on other tasks.

- If you would like your users to transfer ownership of their own **forms**, please navigate them to our Form

Collaboration article.

- If you would like your users to transfer ownership of their own **workflows**, please navigate them to our Workflow Collaboration article.