

Form Collaboration

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Requirements

- You must be on an Essentials plan or higher to share your own forms and data.
- Any user you share your form with must have their own FormAssembly account, on your FormAssembly instance.
- Form owners can transfer to *any* user on their instance.

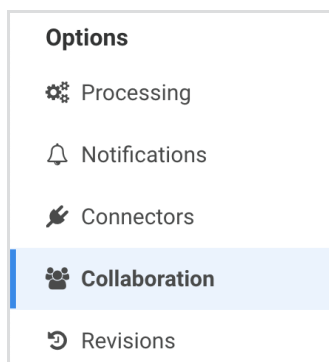
Note: Content Management permissions are not required for form ownership.

Allow Another User to Edit Your Form

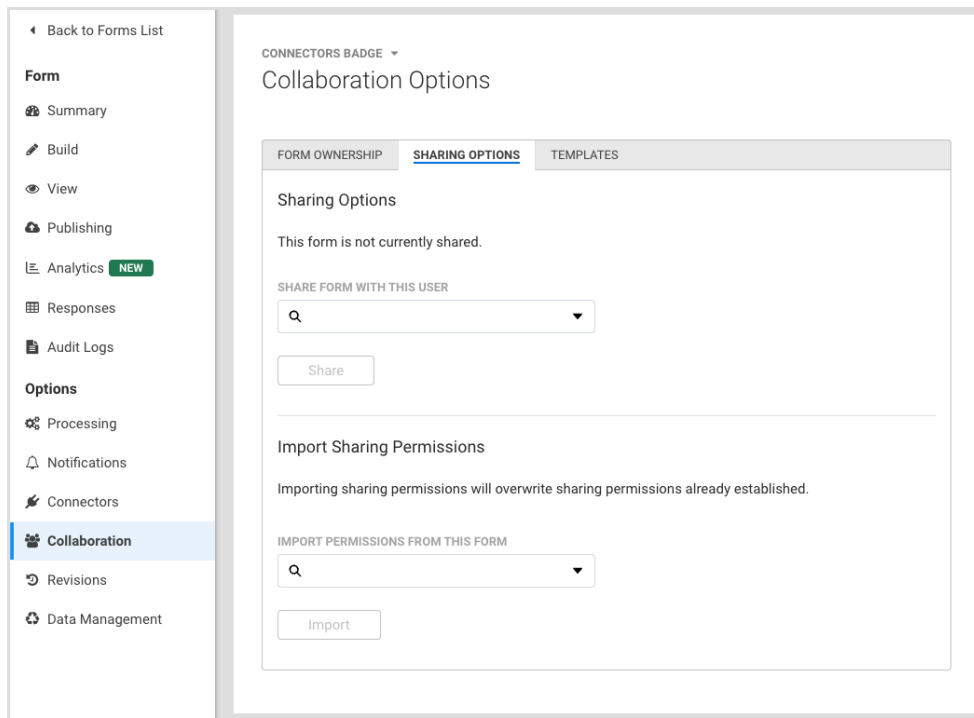
By default, **only you** can access your forms and data. Nothing is shared.

To allow another FormAssembly user to edit your forms, modify the processing options, and/or access the submitted responses:

- Go to the **Forms List**, hover **Configure** for the form you'd like to share, and click **Collaboration**.



- From the **Collaboration Options** window, select the **Sharing Options** tab.



Sharing Options

- In the **Sharing Options** section, select the username of the user you want to share the form with from the user dropdown menu.
- Choose the **PERMISSIONS** you want the user to have. You may select checkboxes for “Can read responses” and/or “Can edit form”.

Note:

- Selecting "Can read responses" will allow the user to both view responses and add notes to submitted responses. If only the "Can edit form" permission is selected, the user will not be able to view responses or add notes.
- Selecting both "Can read responses" and "Can edit form" permissions will allow the user to Archive the form, and Activate the form. Selecting only "Can read responses" will not allow the selected user to Archive or Activate the form.

- **You must select at least one of the permission boxes in order to share the form.**
- Click the **Share** button to complete the sharing process.
- You can share the same form with additional users by selecting another user from the user dropdown menu again, repeating the same steps as before.

Import Sharing Permissions

Access permissions must be configured on a form-by-form basis.

To quickly share several forms or set up another form with many sharing options, you may copy the permissions from an already configured form to other forms in your FormAssembly instance. From the **Import Sharing Permissions** section, select the form you want to copy permissions from in the form dropdown menu.

You may view the username(s) of the user accounts you have shared your form with, and choose to revoke permissions at any time.

The screenshot displays the 'SHARING OPTIONS' tab of a form management interface. At the top, there are three tabs: 'FORM OWNERSHIP', 'SHARING OPTIONS' (which is active), and 'TEMPLATES'. Below the tabs, the section is titled 'Sharing Options'. It states 'This form is currently shared with:' followed by a table. The table has four columns: 'USERNAME', 'CAN READ RESPONSES', 'CAN EDIT FORM', and 'ACTIONS'. There are two rows of data. The first row shows a user with 'CAN READ RESPONSES' checked (green checkmark) and 'CAN EDIT FORM' unchecked (red circle with slash), with a 'Revoke permissions' link in the 'ACTIONS' column. The second row shows a user with both 'CAN READ RESPONSES' and 'CAN EDIT FORM' checked (green checkmarks), also with a 'Revoke permissions' link. Below the table, there is a section 'SHARE FORM WITH THIS USER' with a search dropdown menu and a 'Share' button. Further down, there is a section 'Import Sharing Permissions' with a note: 'Importing sharing permissions will overwrite sharing permissions already established.' Below this is another section 'IMPORT PERMISSIONS FROM THIS FORM' with a search dropdown menu and an 'Import' button.

Changing Form Ownership as a User without Administration Permissions

Any user account that is an owner of a form may transfer ownership of their form to any other user account within their FormAssembly instance without administrative restrictions. This means that form ownership transfer is no longer required to be completed by an admin, freeing up administrators to complete other tasks.

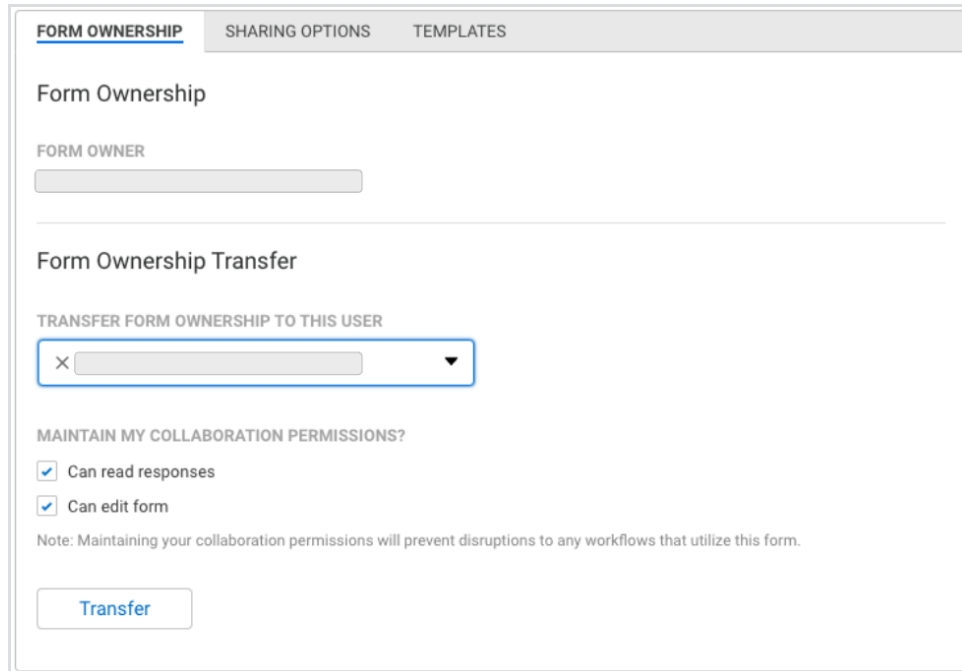
To Complete a Form Ownership Transfer as a Form Owner:

1. Select **Collaboration** to get to **Collaboration Options**
2. Select the **Form Ownership** tab
 - The current form owner is listed under the **FORM OWNER** section. If you are listed as the form owner, you may transfer form ownership to another user account within your FormAssembly instance.
3. In **Form Ownership Transfer**, select a new form owner from the user dropdown menu.
4. If the form is used in a workflow, we recommend that you maintain your collaboration permissions to the

form to prevent errors in the workflow setup due to form ownership transfer.

- Under **MAINTAIN MY COLLABORATION PERMISSIONS**:
 - select the checkbox for **Can read responses**
 - select the checkbox for **Can edit form**

5. Click **Transfer** to complete the form transfer process.



The screenshot shows a web interface for transferring form ownership. At the top, there are three tabs: **FORM OWNERSHIP** (active), **SHARING OPTIONS**, and **TEMPLATES**. Below the tabs, the section is titled **Form Ownership**. Underneath, there is a **FORM OWNER** label and an empty text input field. A horizontal line separates this from the **Form Ownership Transfer** section. In this section, there is a label **TRANSFER FORM OWNERSHIP TO THIS USER** and a dropdown menu with a search icon (X) and a downward arrow. Below the dropdown, there is a section titled **MAINTAIN MY COLLABORATION PERMISSIONS?** with two checked checkboxes: **Can read responses** and **Can edit form**. A note below the checkboxes states: "Note: Maintaining your collaboration permissions will prevent disruptions to any workflows that utilize this form." At the bottom of the form, there is a **Transfer** button.

Workflow Collaboration

To learn about adding collaborators to workflows or transferring ownership of a workflow to another user, [please read our article on workflow collaboration](#).
