

Form Collaboration

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In this Article

[Introduction](#)

[Requirements](#)

[Allow Another User to Edit Your Form and Access Submitted Responses](#)

[Remove a Collaborator from a Form](#)

[Transfer Form Ownership](#)

[Workflow Collaboration](#)

Related Articles

Introduction

By default, only you can access your forms and data. Nothing is shared. From the Form Collaboration page, as the form owner, you can share your form with others or transfer form ownership to another user.

Adding collaborators to a form enables the form owner to easily share the management workload by allowing other team members to assist with editing their forms, modify processing options, and/or access submitted responses.

Note: Only one user can edit a form at a time.

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 and Access Submitted Responses

Form owners can share their forms with other users or [user groups](#).

- Go to the Forms List, hover on **Configure** for the form you'd like to share, and click **Collaboration**.
- Search for or select a user or group from the "Share With Users and Groups" searchable dropdown
- The selected user or group is added to the **Current Access** list

- Select an **Access Level** for the added user or group:
 - **Editor** – can edit the form, but not view responses
 - **Auditor** – can view form responses, but not edit the form
 - **Manager** – can view responses and edit the form
 - Click **Save** in the top right to save changes
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Remove a Collaborator from a Form

- Click **Revoke Access** to remove access for a user in the Current Access list
 - Click **Save** in the top right to save changes
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Transfer Form Ownership

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.

- Click **Transfer Ownership** next to the owner listed in the Current Access list
 - The Form Ownership Transfer Confirmation modal opens
 - Search for or select a user from the searchable dropdown
 - Click **Transfer** to complete the ownership transfer
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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](#).
