

# Grant Access Feature

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## Overview

The Access Grants in FormAssembly can be used to accomplish two functions. First, if your organization needs support from the FormAssembly team, you can grant access to your forms so that we can better troubleshoot any issues you might be facing.

Second, as an Administrator, you can decide the level of access you will have to your users' forms. You can either choose to be able to use the Admin Override function to log in as any of your users, or you can choose to use Access Grants, where your users would need to permit you to access their forms.

Details on how to enable and disable this feature can be found in the following sections.

## Requirements

- The feature, Access Grants, is available on Essentials plans and up
- Administration Permission: Allow administrator to access security settings
- (optional) Administration Permission: Allow administrator to access user's data

## Enabling or Disabling the Access Grants for Administrators

From the Admin Dashboard, go to **Security**. Use the toggle under the header "**Administrator cannot log as another user without an invitation**" to enable or disable the feature. If the feature is disabled, you will be able to log in as any of your users without needing them to grant you access.

ADMINISTRATOR CANNOT LOG AS ANOTHER USER WITHOUT AN INVITATION  
Require invitations for user substitution.



To access your users' forms without permission, you must enable the Administration Permission " **Allow administrator to access user's data**" for your account.

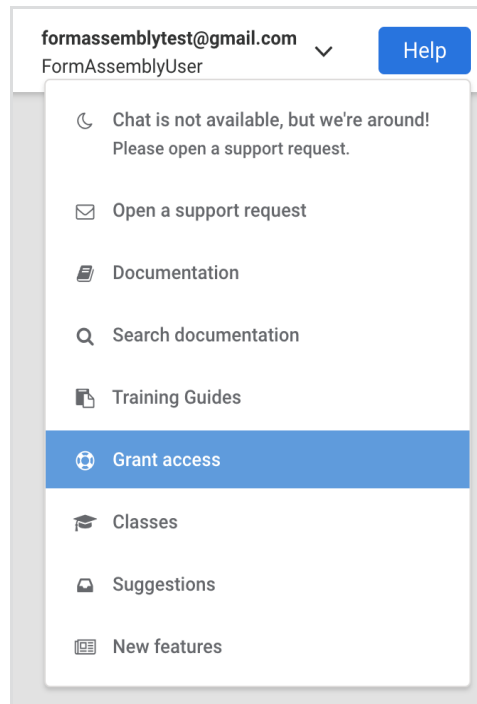
☒ Allow administrator to access user's data

Please ensure that you have clicked **Save** after making changes to either of these settings.

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## Getting Started

To begin, use the dropdown **Help** menu at the top right of FormAssembly to select **Grant Access**.



You will be taken to the Grant Access page, where you will see two options: Administrator Support and FormAssembly Support.

If your users need to grant you access, as an administrator, they would select **Go to Administrator Support**.

If you or your users need to grant access to FormAssembly to troubleshoot an issue, select **Go to FormAssembly Support**.

## Grant access to my account

FormAssembly offers two ways for you to allow others to access your account for support.

### Administrator Support

You may grant administrators access to your account. The administrators will be able to access your account and act "as you" for a limited time.

[Go to Administrator Support](#)

### FormAssembly Support

You may grant FormAssembly Support access to your account.

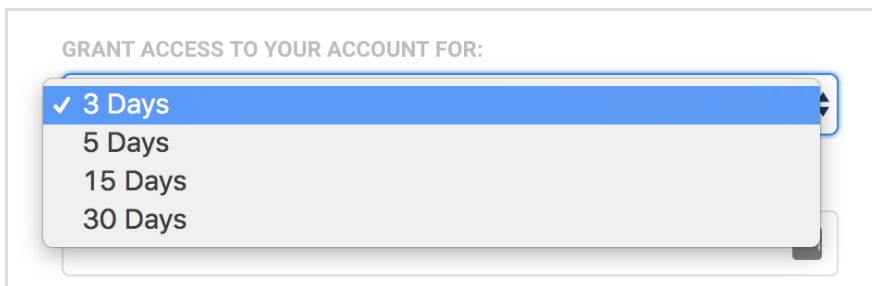
We will be able to securely log in to your account and act "as you" for a limited time.

[Go to FormAssembly Support](#)

**Note:** If you have selected that permission is not required for administrators to log in as users, your users will not see the Administrator Support option.

## Granting Administrator Access

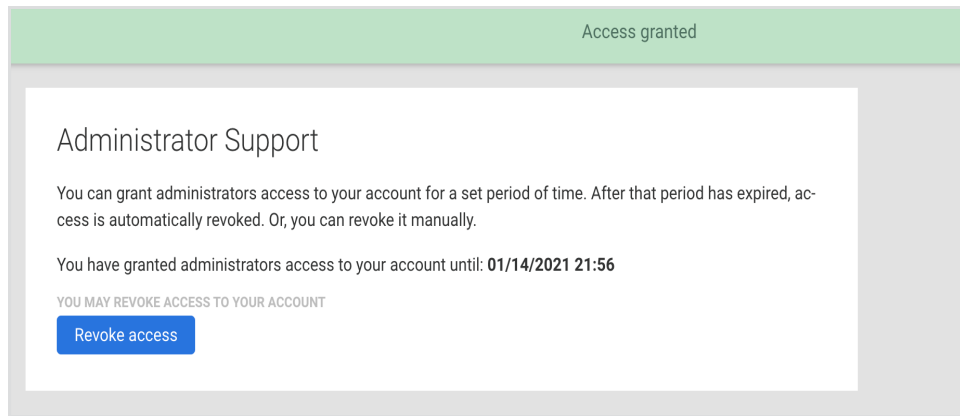
Once you click **Go to Administrator Support**, you will be taken to the Administrator Support screen, where your users can select the number of days account access will be granted (3, 5, 15, or 30 days). When a selection is made, they will need to confirm their password and click **Grant Access**.



GRANT ACCESS TO YOUR ACCOUNT FOR:

- ✓ 3 Days
- 5 Days
- 15 Days
- 30 Days

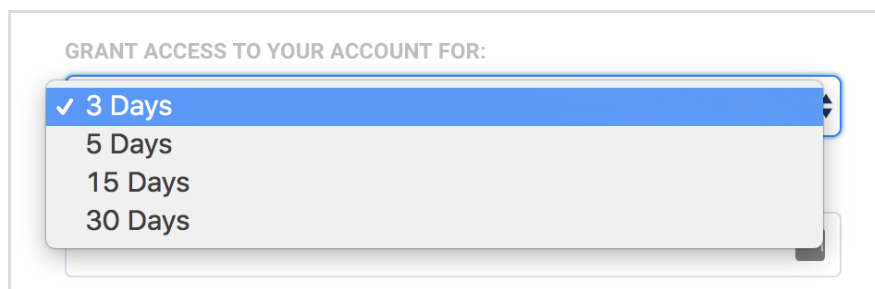
Provided the user's password is correct, the Administrator Support screen will update and display the date and time the administrator's access will expire. The user can revoke this access at any time by clicking the **Revoke Access** button.



## Granting FormAssembly Access

If the need arises for you to grant the FormAssembly support team access to your account, you can do so by clicking the **Go to FormAssembly Support** button.

Next, select the number of days (3, 5, 15, or 30) to allow access.



You will also need to select the access type.

- Selecting **Forms and Responses** will grant access to your forms, connectors, notifications, processing options, and form responses.
- Selecting **Full Access** will grant access to all of these options plus the Admin Dashboard (if you are an administrator), General Settings, and Account Pages.

A screenshot of a form section titled "GRANT ACCESS TYPE: ?". It contains two radio button options: "Forms and responses access" (which is selected) and "Full access".

Once selected, you will need to enter your FormAssembly password and click **Grant Access**.

## FormAssembly Support

You can grant FormAssembly support access to your account for a set period of time. After that period has expired, access is automatically revoked. Or, you can revoke it manually.

GRANT ACCESS TO YOUR ACCOUNT FOR:

1 Day

FOR SECURITY, PLEASE CONFIRM YOUR PASSWORD:

Grant access

**Note:** If you are a Single Sign-On (SSO) user through Salesforce, you will not be required to enter your password during this step.

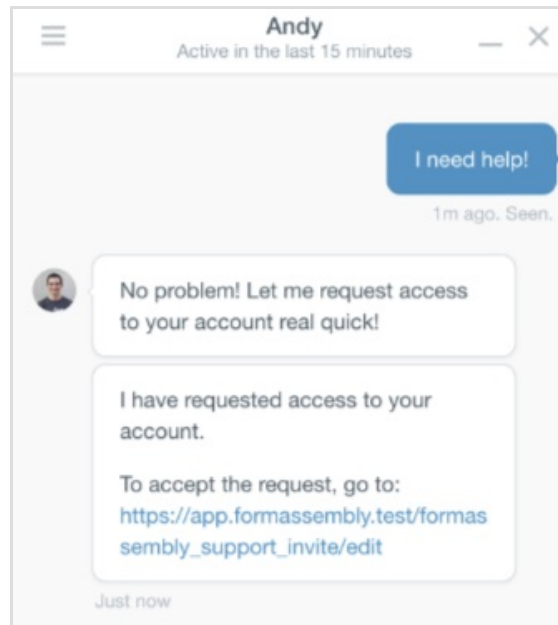
Once access has been granted to FormAssembly, you can see your current access grants at the bottom of the page. You can revoke this access at any time by clicking the **Revoke Access** button

You have granted FormAssembly Support access to your account.

GRANTED	EXPIRES	ACCESS CODE	ACCESS LEVEL	ACTIONS
10/04/2017 17:45	10/07/2017 17:45	<a href="#">443d9e07-a2fa-4ca6-8e3f-494a96ef5786</a>	Forms & responses ⓘ	<a href="#">Revoke access</a>

## FormAssembly Access Request

Our support team may request access through our in-app support chat. If you need assistance or troubleshooting, our support team can send you a direct link to grant access to your account.



Once you click on the link, you'll be taken to the Grant Access page, where you'll be able to see any pending Access Requests. Enter your password and select **Accept**, or choose **Deny** if you do not wish to grant access.


Access Requests				
STAFF MEMBER	DAYS	REQUEST EXPIRES	ACTIONS	
andy@veerwest.com	1 Day	05/20/2016 14:59	<input type="password"/>	<button>Accept</button> <button>Deny</button>

Once you have granted access, you will see that a new Access Grant has been added to your list of Current Access Grants at the bottom of the page.


You have granted FormAssembly Support access to your account.				
GRANTED	EXPIRES	ACCESS CODE	ACCESS LEVEL	ACTIONS
10/04/2017 17:45	10/07/2017 17:45	443d9e07-a2fa-4ca6-8e3f-494a96ef5786	Forms & responses ⓘ	<button>Revoke access</button>

## Reviewing Access Grants

If you are an administrator and you need to review the active Access Grants for your instance, they are accessible on the Admin Dashboard sidebar. You have a dropdown menu labeled **Access Grants** from which you can view both Admin Support grants and FormAssembly Support grants.

 Access Grants ▾

 Admin Support

 FormAssembly Support

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