Grant Access Feature for Enterprise Users

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In this Article
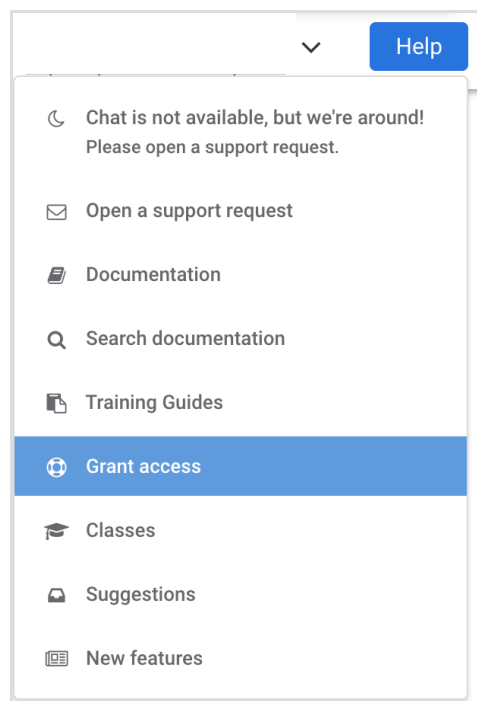
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Introduction

The Grant Access Feature in FormAssembly can be used to accomplish two functions. First, if your organization is in need of 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, if your Enterprise Administrator has enabled the Grant Access feature, then they will need to request access to your account before being able login through your username.

Getting Started

To begin, hover over the blue **Help** menu at the top right of FormAssembly and select **Grant Access**.

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

FormAssembly Support.

If you need to grant your Enterprise Administrator access you would select **Go to Administrator Support**.

If you need to grant access to FormAssembly in order to help troubleshoot an issue, you should select **Go to FormAssembly Support**

Note: On-site Enterprise customers will only see the Administrator Support option, as there is no way currently to grant on-site access to FormAssembly support.

If your Enterprise Administrator has selected that permission is not required to login as users, then you will not see the Administrator Support option:
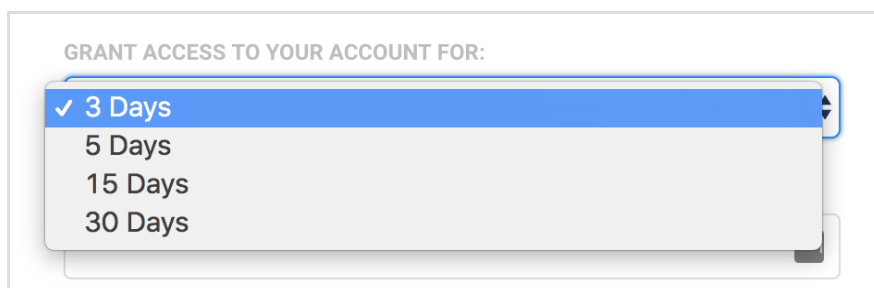

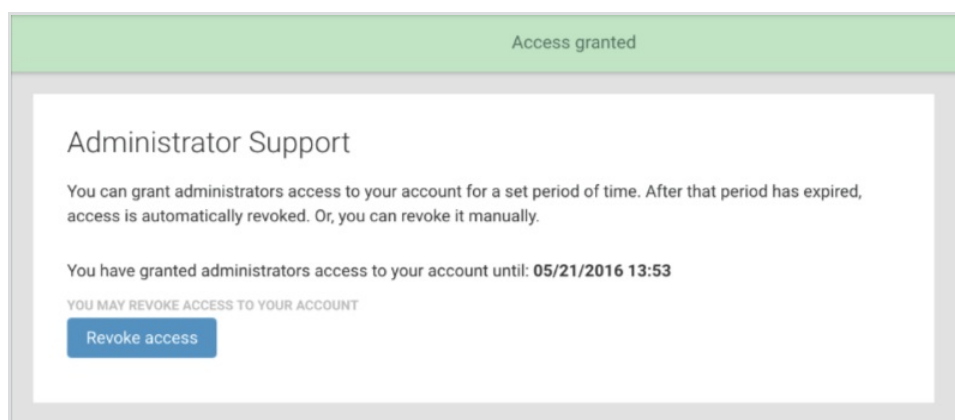# Granting Administrator Access

Once you click on **Go to Administrator Support** you will be taken to the Administrator Support screen, where you will be able to select how many days account access will be granted (3, 5, 15, or 30 days). Once that selection has

been made, you will need to confirm your password and then click the **Grant Access** button.

Next, you will be taken to the confirmation screen which will give the date that administrator access has been provided until. You can choose to revoke this access at any time by clicking the **Revoke Access** button.
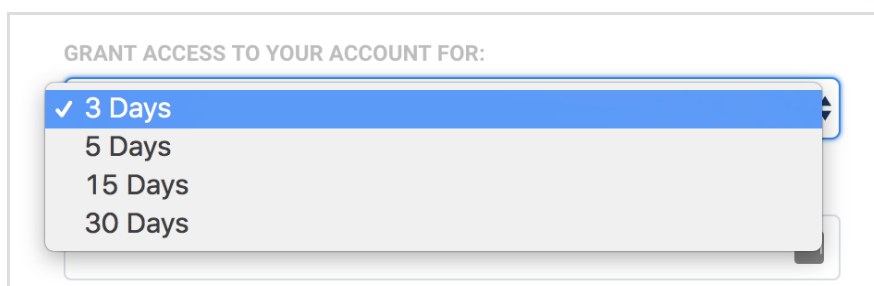

Granting FormAssembly Access

For Enterprise Cloud customers, 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, you will need to select the number of days (3, 5, 15, or 30) that access will be granted for.

You will also need to select the access type. Selecting **Forms and Responses** will grant access to your forms, connectors, and form responses. Selecting **Full Access** will grant access to forms and responses, as well as your notifications and processing options.

GRANT ACCESS TYPE: ❓

◉ Forms and responses access ⚪ Full access

Once that has been selected, you will need to enter your FormAssembly password and click the **Grant Access** button to give access to the FormAssembly support team 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 will be able to see your current access grants at the bottom of the page. You can also choose to revoke access should you need to.

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 ❓	Revoke access

Reviewing Access Grants

Should you need to review your Access Grants at any point in time, they are available at the bottom of the Grant Access page. From here, you will be able to see all the Access Grants that are currently approved.