Grant Access Feature for the Admin Dashboard

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In this Article

- Introduction
- Getting Started
- Granting Administrator Access
- Granting FormAssembly Access
- Reviewing Access Grants

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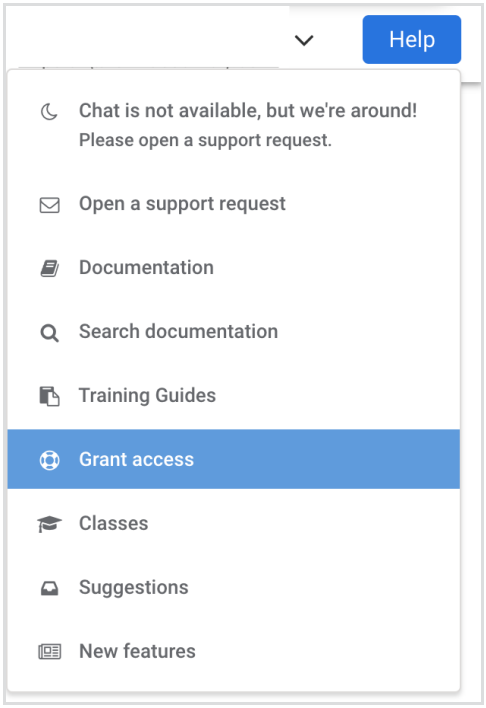
Introduction

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 Administrator has enabled the Grant Access feature, then they will need to request access to your account before being able to log in through your username.

Getting Started

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

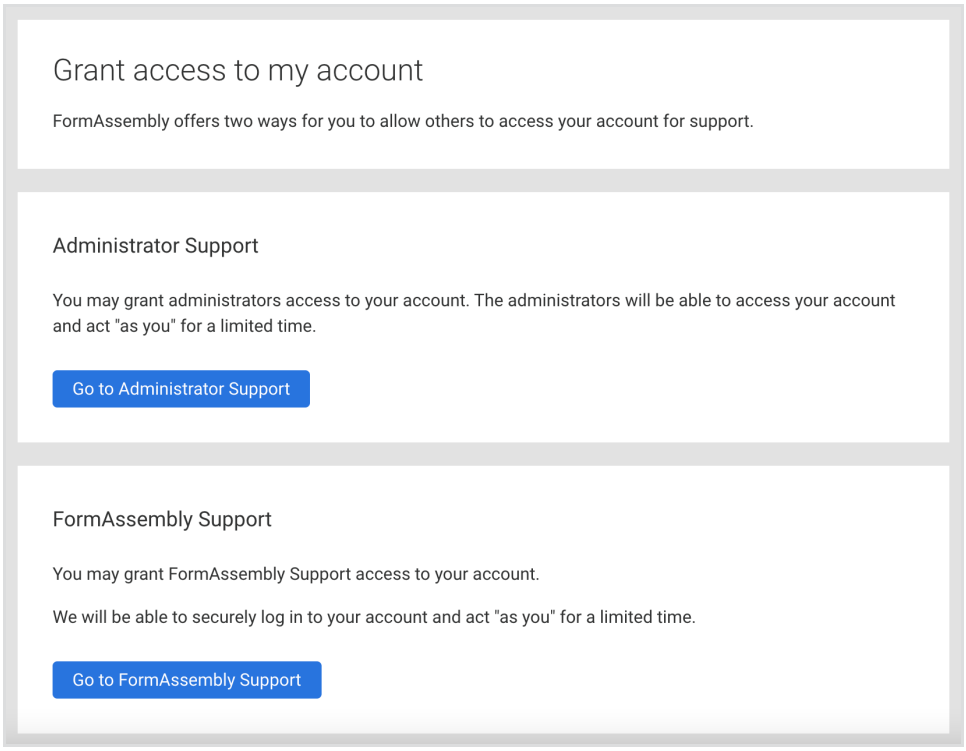


You will be taken to the Grant Access page, where you will see two options: Administrator Support and

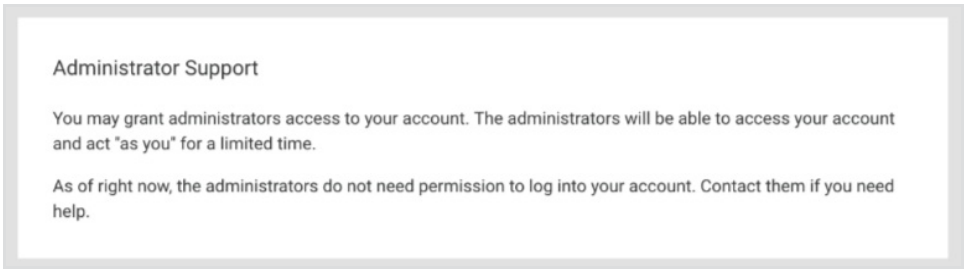
FormAssembly Support.

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

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

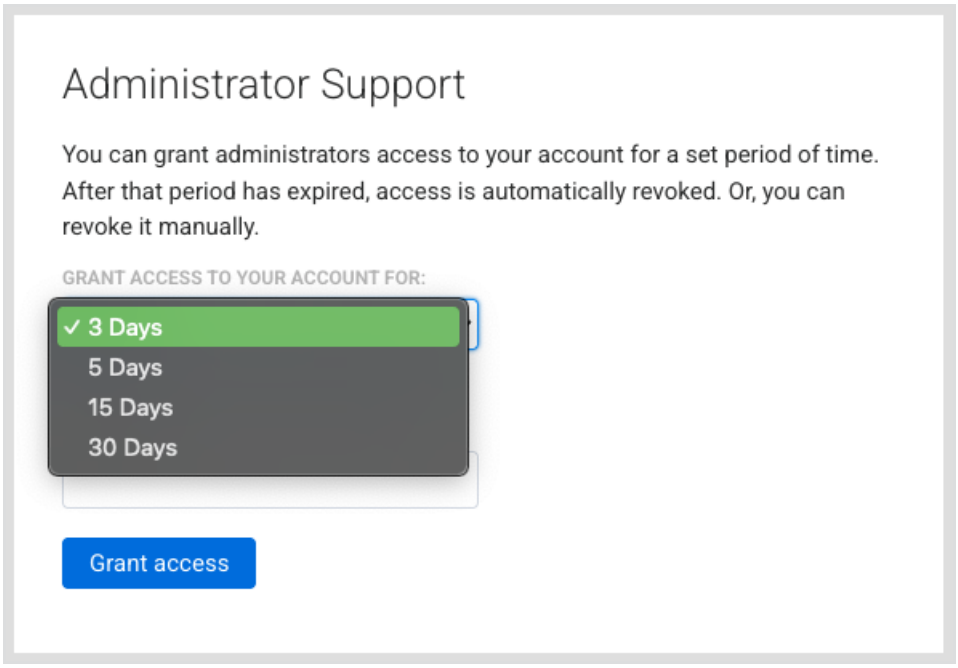


If your Administrator has selected that permission is not required to log in as users, then you will not see the Administrator Support option:

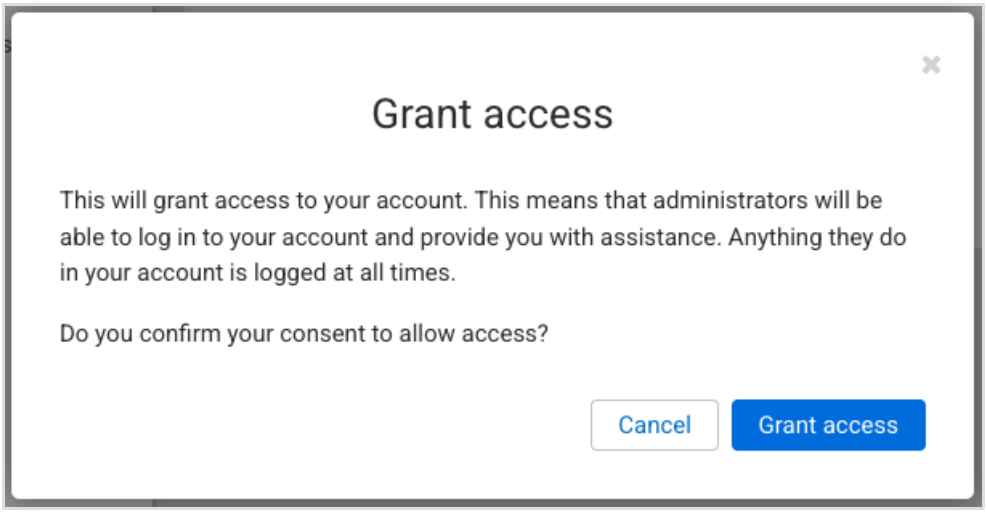


Granting Administrator Access

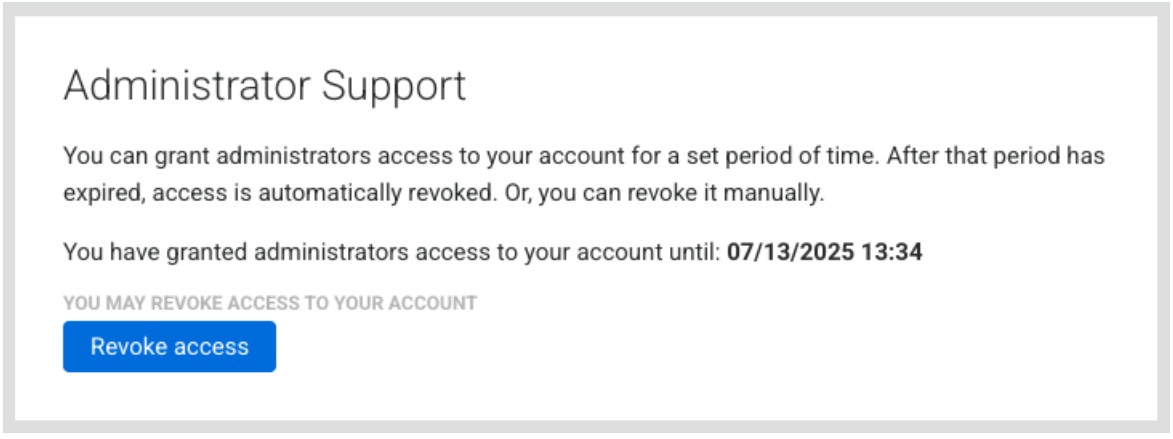
Once you click **"Go to Administrator Support,"** you will be taken to the Administrator Support screen, where you can select the number of days account access will be granted (3, 5, 15, or 30 days). Once the selection is made, you will need to confirm your password and then click the **Grant Access**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



A modal will appear prompting you to confirm your consent to allow access. Select **Grant Access** again to confirm.



The Administrator Support screen will display the date that administrator access will be provided until. You can choose to revoke this access at any time by clicking the **Revoke Access** button.



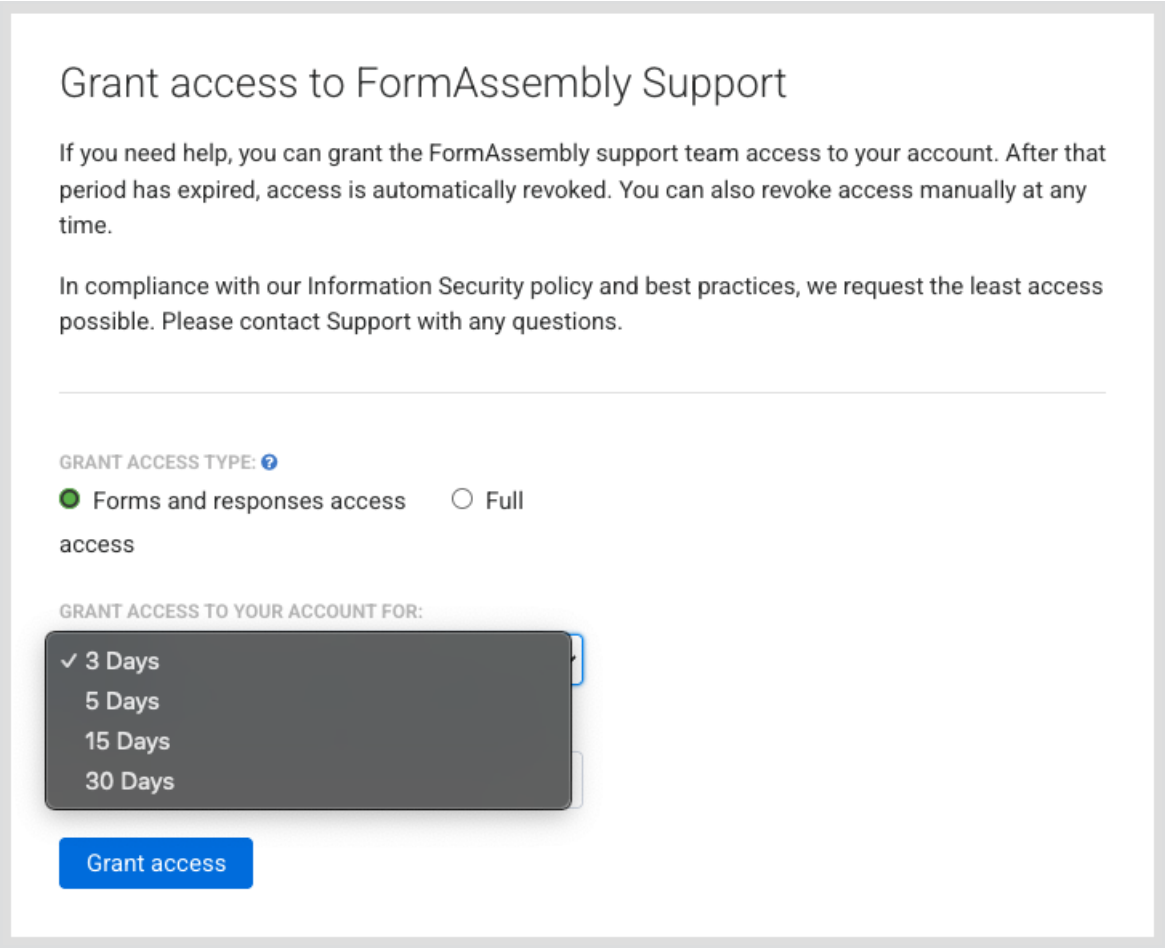
Granting FormAssembly Access

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.

On the FormAssembly Support Access screen, select the **Grant Access Type** you want to use.

- 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.

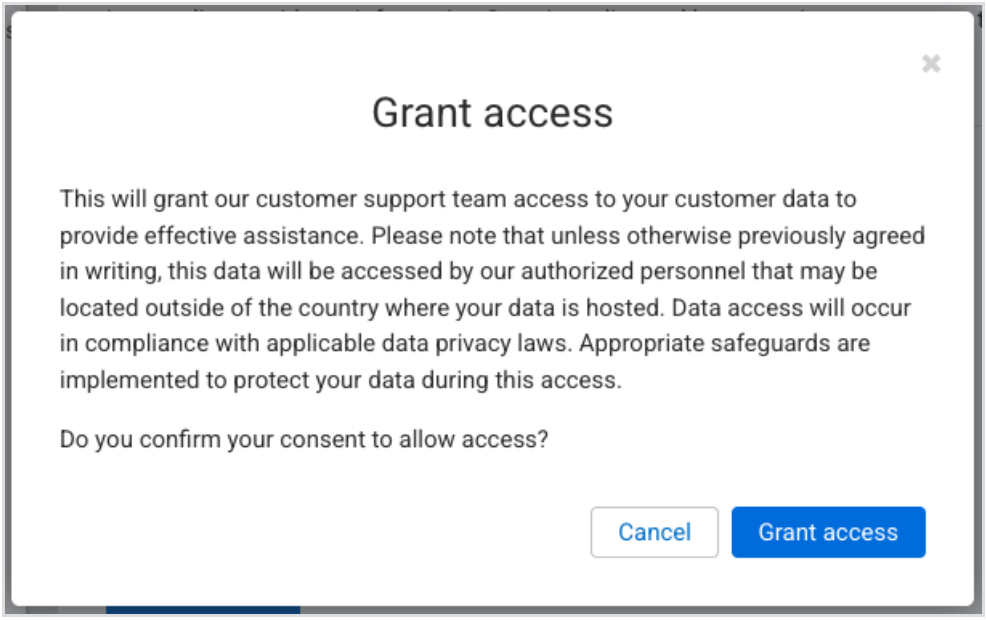
Additionally, you will need to select the number of days (3, 5, 15, or 30) for which access will be granted.



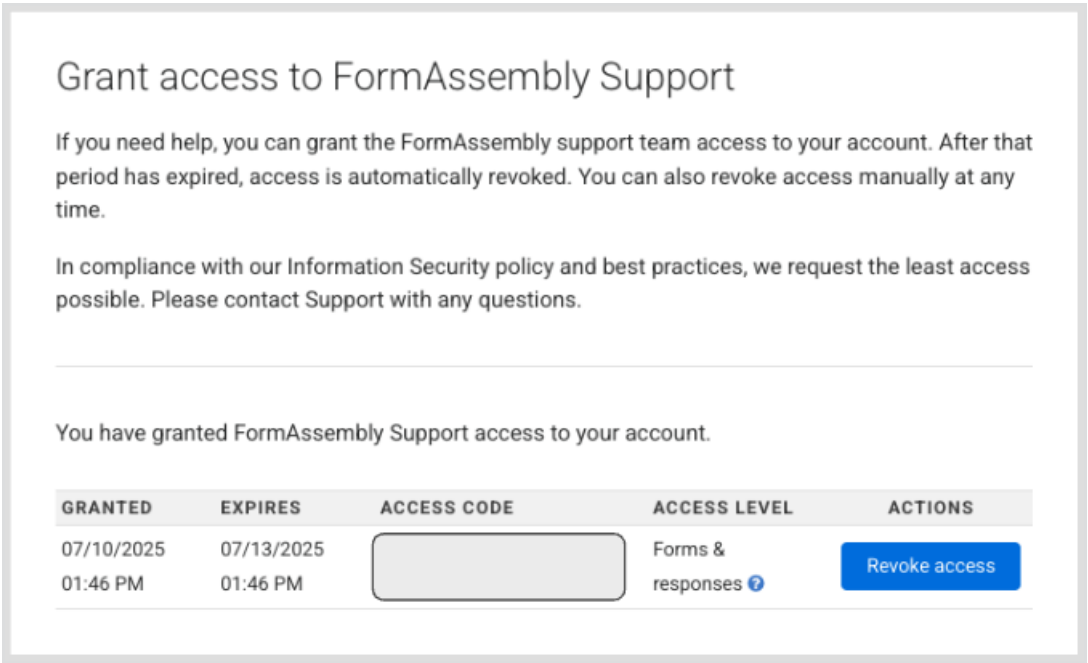
Once selections are made, enter your FormAssembly password and click the **Grant Access** button to give access to the FormAssembly support team.

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

A modal will appear prompting you to confirm your consent to allow access. Select **Grant Access** again to confirm.



Once access has been granted to FormAssembly, you will be able to see your current access grants at the bottom of the page. If needed, you may revoke access here by selecting **Revoke Access**.



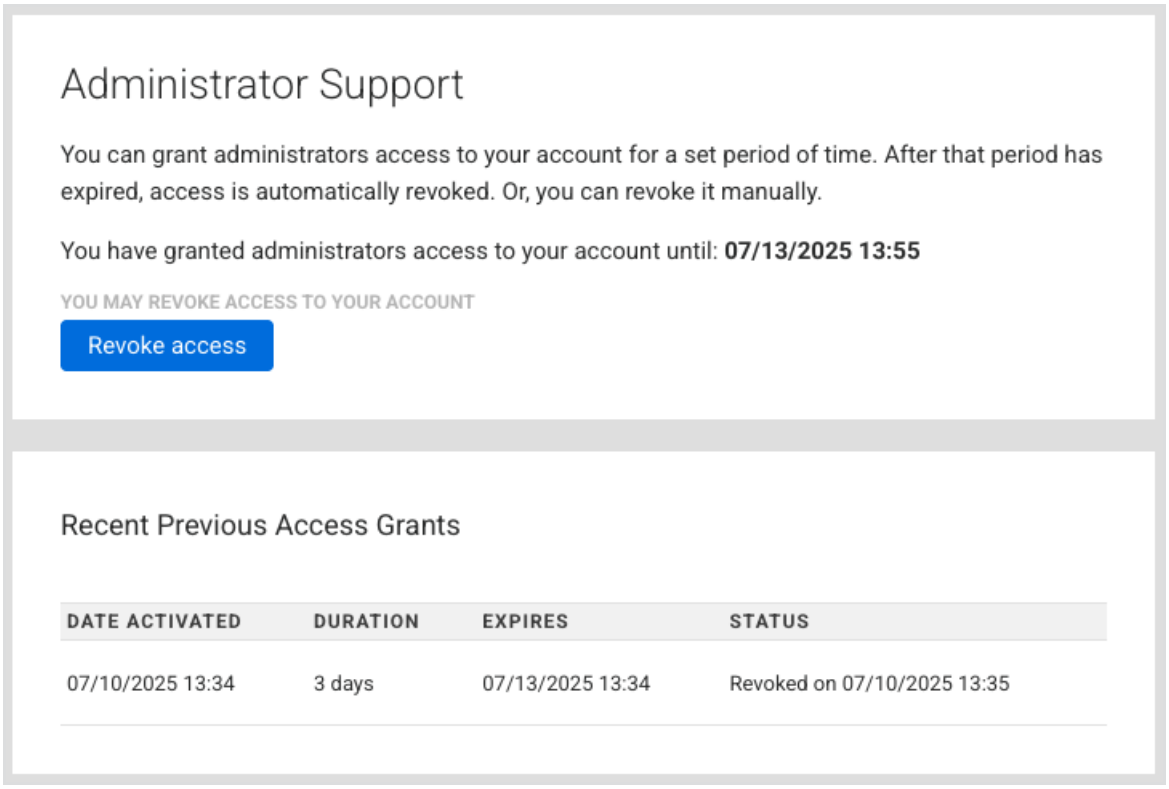
Reviewing Access Grants

Should you need to review your Access Grants at any point in time, they are available on the Grant Access pages for both Administrator Support and FormAssembly Support.

Administrator Support

If Administrator Support access is currently active, the option to **Revoke Access** is available. If no access grant is active, you will see the option to create an access grant.

At the bottom of the page, a log of Recent Previous Access Grants is available for review, displaying the date the access was granted, the duration of the access grant, the expiration date, and the current status.



FormAssembly Support

Your current access grants are displayed at the bottom of the page with the date the access was granted, the date the access expires, the access code to provide to the FormAssembly Support team, and the access level selected for the access grant.

If needed, you may revoke access with the **Revoke Access** button.

