

# Role Permissions

Download the PDF of this article.

## In this Article

- Overview
- Administrator Access
- Form Processing
- Reporting
- Collaboration
- Edit Submitted Responses
- Edit form properties
- Form Builder
- Can use formulas
- Branding and Themes
- Moderation
- Can customize themes
- Force Use of 'Secure Browsing' option (SSL)
- Administrator
  - Can require authentication on forms
  - Allow user to enable E-Signature on forms
  - Can share form in the template library
  - Can use Datasets
  - Can use and create public Datasets
  - Allow form processing on forms created by this user
  - Allow user to perform searches over their response data
  - Allow user to (re)index form responses for search manually
  - Can create themes
  - Can use Dynamic Picklists
  - Use Connectors

## Related Articles

### Overview

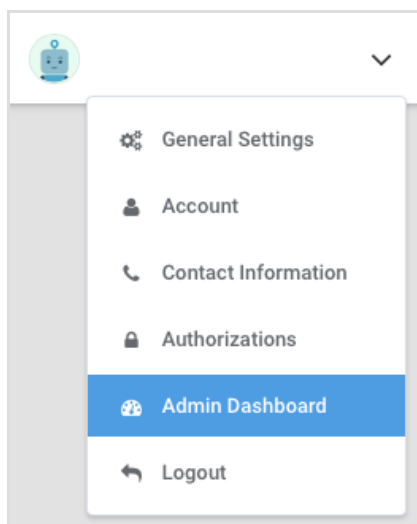
We're excited to officially launch a new licensing model and Permissions Packages for all multi-user FormAssembly plans! This document covers the legacy Enterprise and Compliance Cloud plans. Once your instance has been updated, you can refer to our new [User Management and Licensing](#) document or reach out to us with any questions.

---

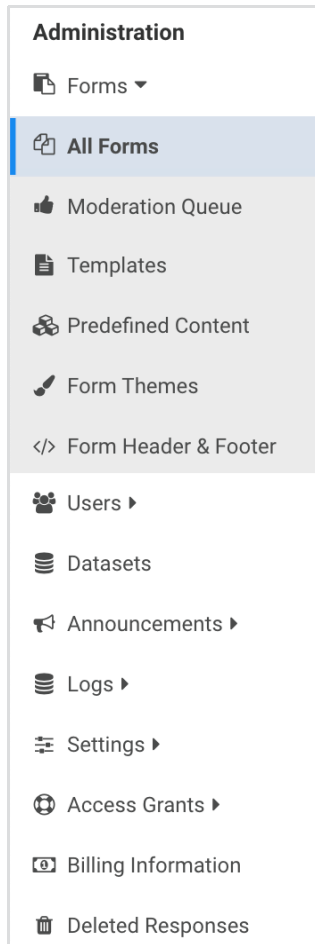
Administrators can customize role permissions to specify the options and functionalities that users can access based on their assigned role. If a user attempts to access an option that they don't have access to, they will see the message: **option is not available with their current role** .

## Administrator Access

This permission allows you to access the Admin Dashboard.



All options under Administration can be accessed with this permission enabled except for the Moderation Queue, Form Header & Footer and Datasets. These sections has its own permission that must be enabled separately.



---

## Form Processing

### Use Upload Field in Forms

This will allow form respondents to upload files to your form. When this permission is disabled, respondents will get an error when submitting a form that contains a file upload field.

### Enable 'Save and Resume' option

The [Save and Resume](#) option can be enabled on the **Processing** page. This will allow respondents to save their form and resume the form at another time.

OPTIONAL PROCESSING FEATURES:

Allow respondents to save their progress and resume the form later [?](#)

## Enable 'Review before submit' option

The [Review Before Submit](#) option can be enabled on the **Processing** page. This will let respondents review their form responses before submitting the form.

OPTIONAL PROCESSING FEATURES:

Allow respondents to review their response before a final submit [?](#)

## Use Secure Forms (SSL)

This is enabled by default and can no longer be changed.

## Use Captchas (Spam Protection)

[Google reCAPTCHA](#) can be enabled on the **Processing** page. This helps reduce spam on your form.

SPAM FILTER OPTIONS:


Use Google reCAPTCHA (a challenge that helps prevent spam) [?](#)

## Setup Email Notifications

This must be enabled together with the "Edit Form Properties" permission. [Email notifications](#) are automated emails sent to the form owner and other individuals you designate from within your organization.

**YOUR NOTIFICATIONS**

YOUR EMAIL NOTIFICATION:


enabled (text email) 

EMAIL TEMPLATE:


Default template

Customized template

EMAIL RESPONSES TO:



BCC:



### **Customize email notifications**

To use customized template for notifications, "Setup Email Notifications" and "Edit Form Properties" permissions must be enabled.

EMAIL TEMPLATE:

Default template

Customized template

EMAIL RESPONSES TO:

BCC:

SENDER EMAIL:

SENDER NAME:

EMAIL SUBJECT:

EMAIL CONTENT:

Your form "%%FORM\_NAME%%" has received the following response:

Submitted on: %%SUBMITTED\_DATE%%

Completion time: %%COMPLETION\_TIME%%

%%RESPONSE%%

## Use Auto-Responder

This must be enabled together with the "Edit Form Properties" permission. The [auto-responder](#) sends an email to a respondent after submitting the form.

**AUTO-RESPONDER**

AUTO-RESPONDER:  
enabled (text email) ▾

SENDER EMAIL:

SENDER NAME:  
 f

EMAIL SUBJECT:  
 f

EMAIL CONTENT:

## Use RSS Feed

This option is available on the **Notifications** page. This must be enabled together with the "Setup Email Notifications" and "Edit Form Properties" permissions.

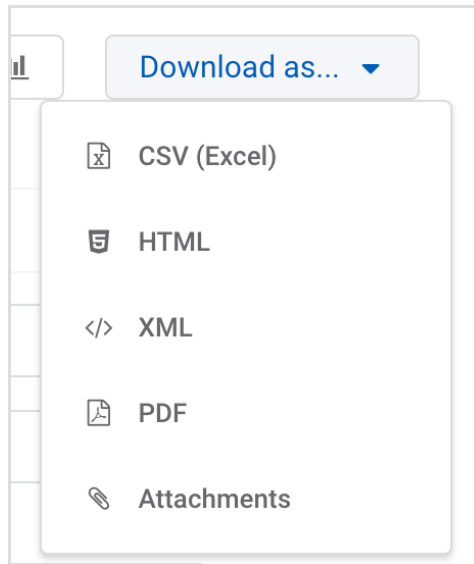
RSS FEED:  
 [Subscribe to this feed](#) ([What is RSS?](#))

---

## Reporting

### Export Submitted Data

This will allow you to [export response data](#) as CSV, HTML, XML, PDF or Attachments.

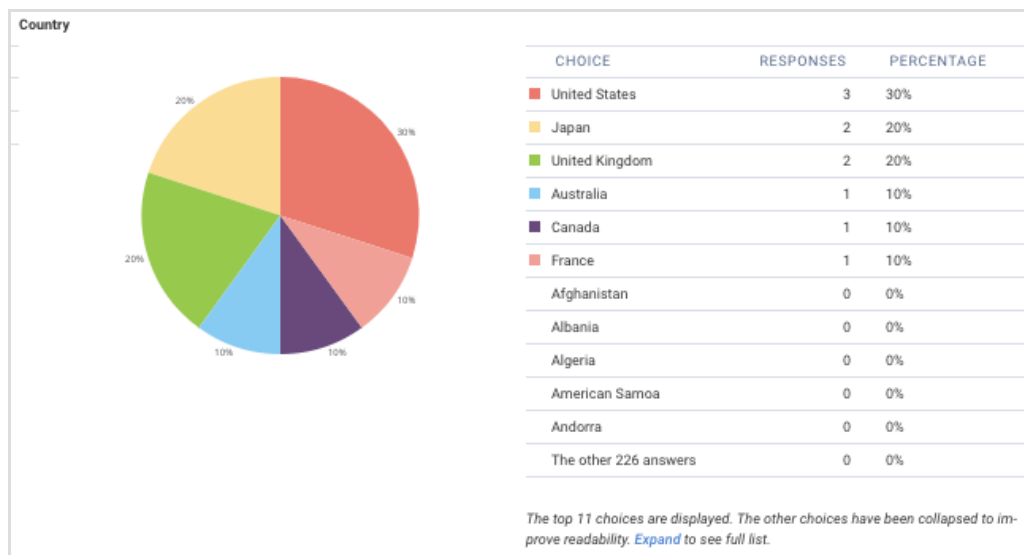


## View Charts

This will let you view a visual representation of form responses. It can be accessed in the [Report](#)



by clicking on this button.



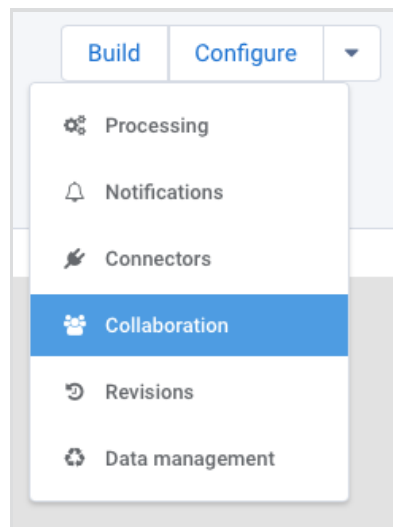
## Collaboration

### Share own forms with other users

This will allow you to access the **Collaboration** page and [share forms](#) with other users in your



instance. "Edit Form Properties" must be enabled together with this permission.



## Lookup user list when assigning permissions

This will let you see the list of users as you type on the username field in the **Collaboration** page when sharing forms with other users.

**SHARING OPTIONS**

This form is not currently shared.

**SHARE WITH:**

USERNAME:

testuser

testuser

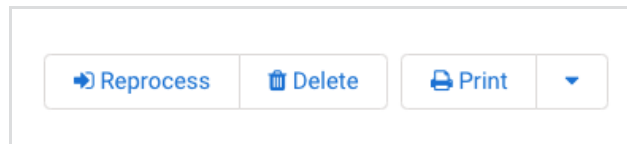
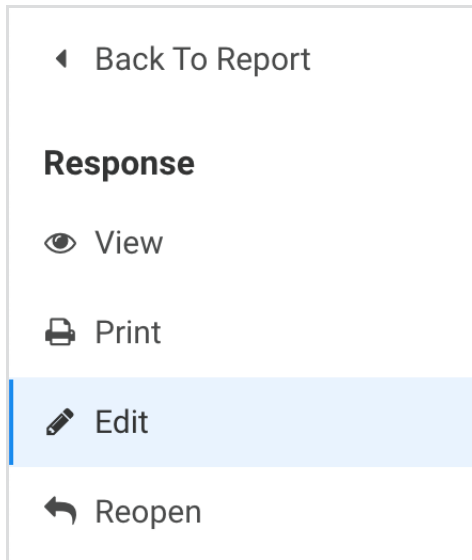
- Can read responses
- Can edit this form

Add

---

## Edit Submitted Responses

This will let you edit and delete form responses.



---

## Edit form properties

It's best to enable this permission for user roles that will have access to any of the following options. "Edit form properties" must be enabled for these functionalities to work.

- Enable 'Save and Resume' option
- Enable 'Preview before submit' option
- Use Captchas (spam protection)
- Setup Email Notifications
- Customize email notifications
- Use Auto-Responder
- Use RSS Feed
- Share own forms with other users

---

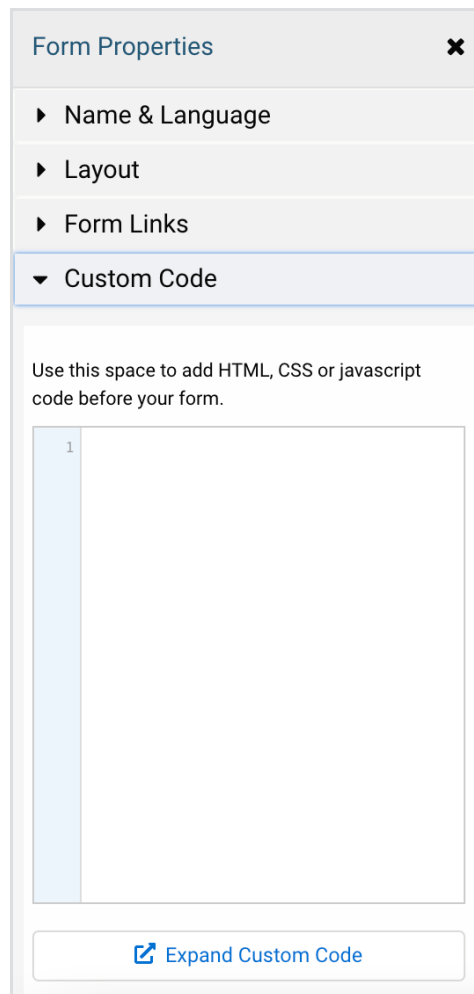
## Form Builder

## Create and modify forms

This will let you access the form builder and create new forms.

## Add custom code to form

This will allow users to add custom code under **Properties** in the form builder.



Form Properties ✕

- ▶ Name & Language
- ▶ Layout
- ▶ Form Links
- ▼ Custom Code

Use this space to add HTML, CSS or javascript code before your form.

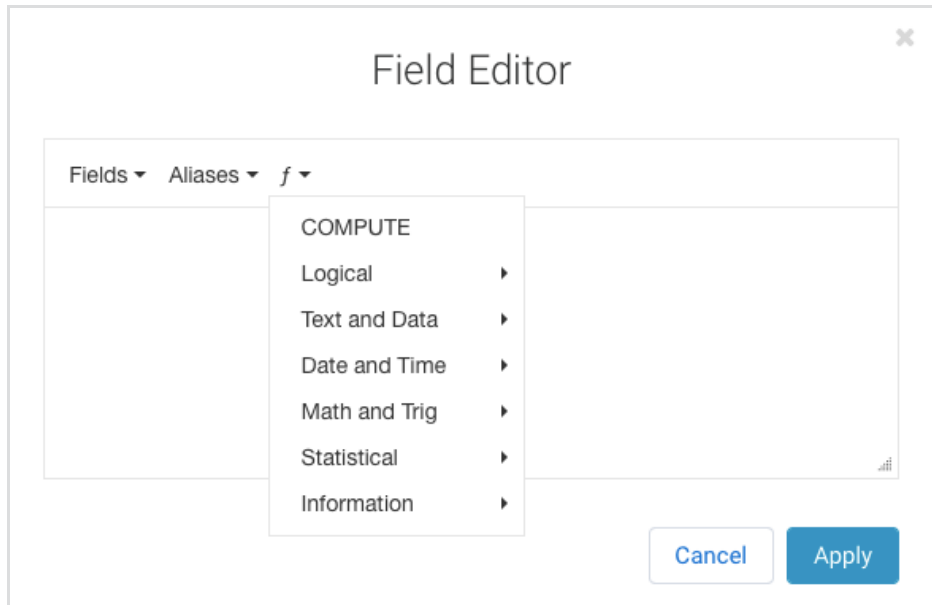
1

[Expand Custom Code](#)

---

## Can use formulas

You would need to enable this permission in order to use the formula engine and apply [formulas](#) in email templates, thank you messages, redirect URL and connectors.

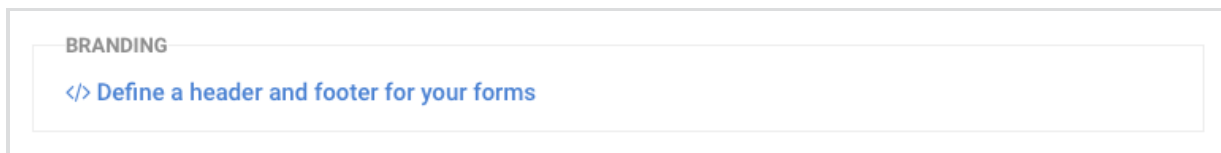


---

## Branding and Themes

### Custom form branding

Users with this permission will have access to the [Branding](#) feature under General Settings.



Enterprise administrators with this permission will be able to access the [Form Header & Footer](#) section **within** the Admin Dashboard.

◀ Back to Forms List

**Administration**

- 📁 Forms ▾
- 📄 All Forms
- 👍 Moderation Queue
- 📄 Templates
- 🔗 Predefined Content
- 🔧 Form Themes
- </> **Form Header & Footer**
- 👤 Users ▶
- 📄 Datasets
- 📣 Announcements ▶
- 📄 Logs ▶
- ⚙️ Settings ▶
- 🔑 Access Grants ▶

## Branding

### Default Page Header

1

The page header is displayed above your forms and on every page related to form processing (i.e. the submission confirmation page, the thank-you page, etc.). You may use this space to add your logo, navigation links, etc.. Please enter valid HTML.

### Default Page Footer

1

The page footer is displayed below your forms and on every page related to form processing (i.e. the submission confirmation page, the thank-you page, etc.). You may use this space to add legal mentions, navigation links, etc.. Please enter valid HTML.

## Moderation

### Must request publishing approval

Users with this permission need to request approval to publish their created forms.

### Can grant publishing approval

Users with this permission have access to the moderation queue and can grant approval to forms in [moderation](#).

### Moderation Queue

1 forms in queue

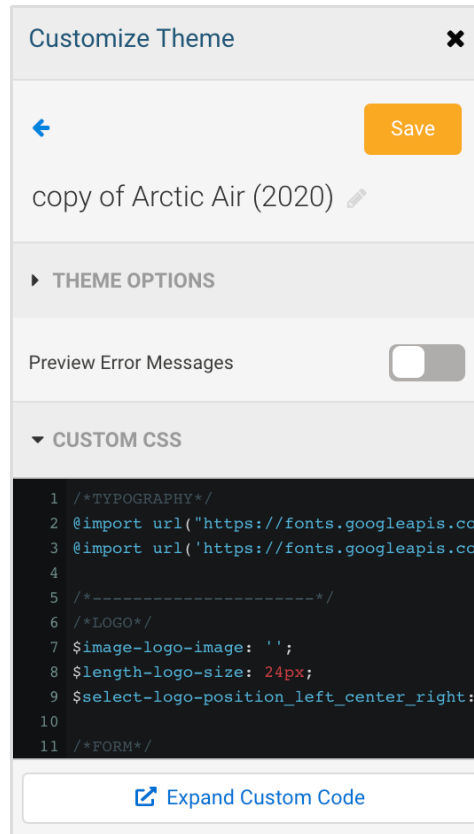
**FILTER**

form id ▾ matches:  Search reset

STATUS	FORM	CREATED ON	USER
Need Approval	Contact Form	12/11/2018 07:07:27 PM	user

## Can customize themes

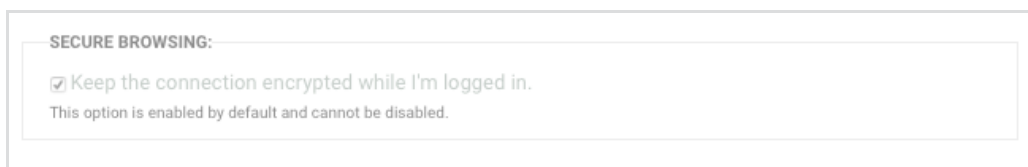
This allows a user to customize themes with [Theme Editor 2.0](#).



---

## Force Use of 'Secure Browsing' option (SSL)

This is enabled by default and can no longer be changed.



---

## Administrator

### Allow administrator to access user's data

This will give the administrator the ability to log in as the [user](#) and access the user's forms.

### User Information

[Log in as this user](#) | [Edit](#) | [Delete](#)

#### User Details

USERNAME / ID  
**username / 40**

## Allow administrator to edit role permissions

This will allow the administrator to customize role permissions. When this is disabled, the administrator can still see the User Roles page but will not be able to make changes to the permissions.

### Roles

[Back to all roles](#)

#### ROLE

NAME

LISTING ORDER

EXTERNAL REFERENCE

[Delete this role](#)

#### PERMISSIONS

Check All

Administrator Access

Use Upload Field in Forms

Enable 'Save and Resume' option

Enable 'Preview before submit' option

## Allow administrator to assign admin roles and edit admin users

Administrators with this permission would be able to assign the Administrator role to any user. It will also allow them to view and edit the information for other Administrators.

### User Information


[Delete User](#)

**EDIT USER**

USERNAME

ROLE

AUTHENTICATION TYPE

EMAIL:  
 \*

FIRST NAME:

MIDDLE NAME:

LAST NAME:  
 \*

### Allow administrator to reassign a form to another user (including oneself)

Administrators with this permission can view and edit the owner ID field on the the form's **Edit Properties** page to [reassign forms](#) to another user.

**EDIT FORM**

FORM ID (REVISION #):  
4678235 (4)

NAME

OWNER ID  
 Enter a valid user ID to reassign the form to a different user.

## Can require authentication on forms

This will allow users to enable [respondent authentication](#) on their forms to restrict form access to



authenticated users.

The screenshot shows a 'Processing Options' form. It has three main sections: 'FORM AVAILABILITY:', 'STATUS:', and 'ALLOW RESPONSES FROM:'. Under 'STATUS:', there are two radio buttons: 'Active' (selected) and 'Archived (no processing)'. Under 'ALLOW RESPONSES FROM:', there is a dropdown menu with 'Anyone' selected. The dropdown menu is open, showing a list of options: 'Anyone', 'CAS Authenticated Users', 'LDAP Authenticated Users', 'Salesforce Community User', and 'SAML Authenticated Users'.

## Allow user to enable E-Signature on forms

This will allow users to enable [e-signature](#) on their forms on the **Processing** page.

The screenshot shows an 'E-SIGNATURE' form. It has a checkbox labeled 'Enable E-Signature' which is checked. To the right of this checkbox is a notice: 'Notice: Because E-Signature Records must be retrievable by the respondent, all E-Signature Records are stored indefinitely. If you have any questions or concerns, please contact Support.' Below the notice is a paragraph: 'Please provide the contact information of a person able to answer any questions related to the signature process. This information will be shared with the respondents.' There are two input fields: 'CONTACT NAME:' and 'CONTACT EMAIL ADDRESS:'. Below these fields are two checkboxes: 'Show E-Signature emails as being sent on behalf of this contact.' and 'Collect respondent's initials along with the signature.'.

## Can share form in the template library

This will give form owners the ability to share their own forms to the Template Library. This option is available on the form's **Collaboration** page.

Note that in order for the form to display in the Template Library, the Enterprise administrator must approve the form by going to: **Admin Dashboard | Forms | Templates.**

Collaboration Options

TEMPLATES

ADD TO THE TEMPLATE LIBRARY?

No

Yes

Forms listed in the Template Library are available to all FormAssembly users. Your responses and processing options, however, **remain private.**

Please note that templates must be approved in order to be listed in the library. If you need to share your form with another user, use the 'Share' tab.

Apply


## Can use Datasets


You will need to make sure that this permission is enabled in order to use [datasets](#) with the Autosuggest feature. This is enabled by default for all users.

Setup Choices


Select an option to set the source for this question's list of choices. You can change the source at any time in the Edit Choices modal.

[Learn more about creating your list of choices.](#)

 **Manual Input**  
Add choices by typing or copying and pasting.

 **Dataset**  
Add choices from an existing dataset or upload a new dataset (CSV file). Supports up to 250,000 choices. This option will automatically change your question into a text input.

Edit Choices: Dataset ▼

 **Data in datasets should be public data only.** [Learn more.](#)

Upload a CSV file to create a new dataset. [Learn more about formatting files.](#)

no file selected

---

## Can use and create public Datasets

This will allow you to use public datasets and make your datasets public so other users in your instance can use these in their forms. Note that you will need to enable "Can use dataset" along with this permission.

All Datasets					
Active Datasets					
FILENAME	CREATOR	LANGUAGE	CREATED	MODIFIED	VISIBILITY
US States.csv	username	English (US)	10/04/2018 07:39:20 PM	10/04/2018 07:41:03 PM	Public <a href="#">Make Private</a>

---

## Allow form processing on forms created by this user

This permission must be enabled for your active forms to be available and accessible to respondents. Respondents will see a message that the **Form is not available** if a respondent tries to access your form and this permission is disabled.

---

## Allow user to perform searches over their response data

This will let you search [form responses](#) across all fields or from within a specific field.

<input type="text" value="Search"/>
<input type="text" value="All Fields"/>

---

## Allow user to (re)index form responses for search manually

This will give users the ability to [re-index a response](#) if there are issues with your responses search results.

### Form Indexer for Search

RESPONSE PAGES TO INDEX

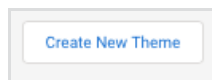
[Click to index all response pages.](#)

RESPONSES PAGE: 1

[+ Click to index page 1 of responses.](#) Contains responses: 704 to 704. Count: 1


## Can create themes

This will allow you to [create a new theme](#) using Theme Editor 2.0. This is enabled by default for all users. If this permission is not checked the user will still be able to customize and clone themes using the Theme Editor's customization controls, but they will not be able to access or change the Custom CSS/SCSS variables.



### Customize Theme

← Save

New Theme 

▶ THEME OPTIONS

Preview Error Messages

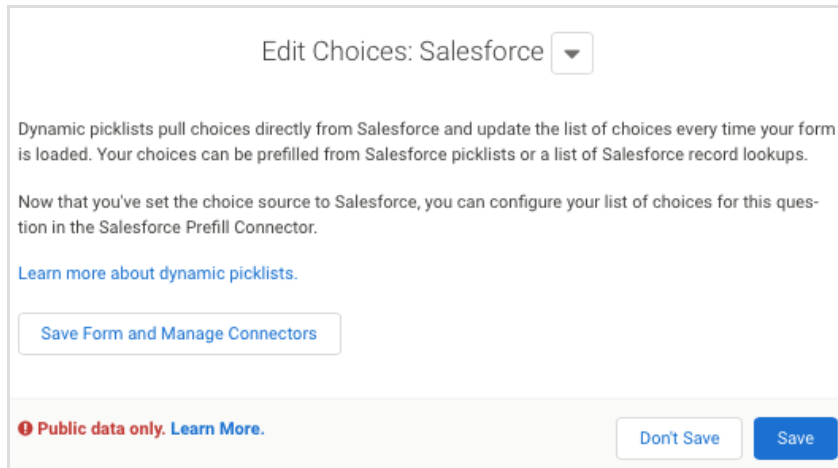
▼ CUSTOM CSS

```
1
```

[Expand Custom Code](#)

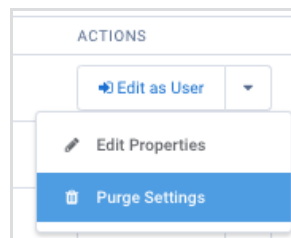
## Can use Dynamic Picklists

Users with this permission will be able to use the [Dynamic Picklist](#) feature which will allow you to use drop-down menus in your forms that pull options directly from Salesforce picklists or lookup results.

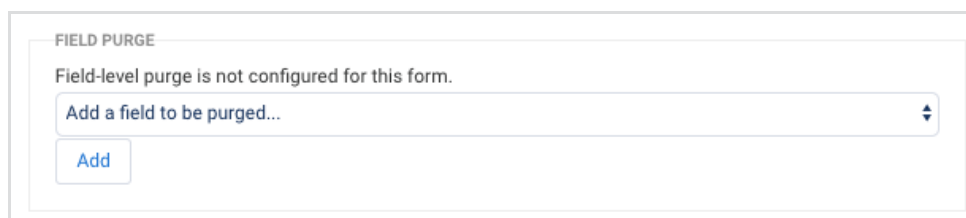


The screenshot shows a configuration panel titled "Edit Choices: Salesforce" with a dropdown arrow. Below the title, there is explanatory text: "Dynamic picklists pull choices directly from Salesforce and update the list of choices every time your form is loaded. Your choices can be prefilled from Salesforce picklists or a list of Salesforce record lookups." This is followed by another paragraph: "Now that you've set the choice source to Salesforce, you can configure your list of choices for this question in the Salesforce Prefill Connector." A link "Learn more about dynamic picklists." is provided. A button "Save Form and Manage Connectors" is located below the text. At the bottom, there is a red warning icon and text "Public data only. Learn More." followed by "Don't Save" and "Save" buttons.

[field-level purge](#) for the forms that they own. The custom data retention must be enabled in order to use this option.



The screenshot shows a menu titled "ACTIONS". The menu items are "Edit as User" (with a dropdown arrow), "Edit Properties" (with a pencil icon), and "Purge Settings" (with a trash icon and highlighted in blue).



The screenshot shows a configuration panel titled "FIELD PURGE". The text inside says "Field-level purge is not configured for this form." Below this is a text input field containing "Add a field to be purged..." with a dropdown arrow on the right. An "Add" button is located below the input field.

---

## Use Connectors

Each connector has a permission that must be enabled separately for it to be available on the connector timeline.

Authorize.Net

CAS (Prefill)

Chargent

CyberSource

Salesforce Marketing Cloud

Salesforce Marketing Cloud (Prefilling)

FreshBooks

HTTPS

iATS

LDAP (Prefill)

PayPal

Post Redirect

Salesforce (v.1)

**This connector is deprecated and will be removed in future versions.**

Salesforce

Salesforce (Prefill)

SAML (Prefill)

Stripe

Google Spreadsheets

**This connector is deprecated and will be removed in future versions.**

Google Sheets 2

---