

User Management and Licensing

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Related Articles

Overview

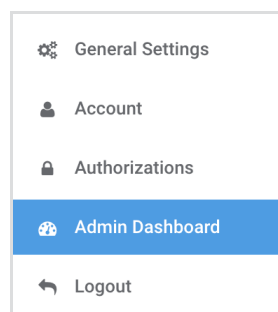
As an administrator of your FormAssembly instance, you can add, deactivate, restore, or edit users. You are also able to set and refine the permissions available to your users.

Requirements

- Must be part of an Essentials plan or above.
- Administration permissions must be enabled for your user account.

Accessing the Admin Dashboard

To perform the tasks below, you will need access to the Admin Dashboard. This can be found by going to the dropdown menu next to your name, at the top of the FormAssembly app. From here, you'll be able to select "Admin Dashboard".



Licensing & Usage

The Licensing & Usage page displays information about the licenses and add-ons available to your FormAssembly instance, and usage information for permission packages and [Advanced Document Generation](#).

Access this page by selecting **User Management | Licensing** on the left-side menu.

LICENSES DEFINITION
Limited License A limited license includes: <ul style="list-style-type: none">• 1 Basic Permission Package• 1 Audit Permission Package
Standard License A standard license includes: <ul style="list-style-type: none">• 1 Basic Permission Package• 1 Content Management Permission Package• 1 Administration Permission Package• 1 Audit Permission Package
Approve License An Approve license includes: <ul style="list-style-type: none">• 1 Basic Permission Package• 1 Approver Permission Package• 1 Audit Permission Package

Adding a User

1. On the left-side menu, select **User Management | Add New User**

New User

GENERAL
PERMISSIONS
DETAILS

Account

USERNAME *

USER LOGIN METHOD

FormAssembly ▼

Contact

FIRST NAME *

LAST NAME *

EMAIL ADDRESS *

PHONE NUMBER

CONTACT INFORMATION

ALTERNATE CONTACT NAME

ALTERNATE CONTACT EMAIL ADDRESS

Company Information

ORGANIZATION NAME

LEVEL AT ORGANIZATION

DEPARTMENT AT ORGANIZATION

TITLE AT ORGANIZATION

2. Select a login method from the following User Login Method dropdown options:
 - **FormAssembly:** The standard FormAssembly account login method uses your FormAssembly username and password.
 - **SAML:** Uses your configured SAML identity provider as the login method.
 - To configure SAML for your instance, refer to our [SAML authentication article](#).
 - **LDAP:** Uses your LDAP (or Active) Directory as the login method.
 - To configure LDAP for your instance, please [open a case with FormAssembly Support](#) and refer to our [LDAP authentication article](#).

Note: If an Instance Login Method is configured to an option other than “Manage via user’s settings”, the User Login Method will be locked to the option set on the Security page. For more details, refer to the [Instance Login Method article](#).

3. Fill in the **Contact** and **Company Information** sections.
4. Open the **Permissions** tab to add user permissions. To learn more, continue to the User Permissions section below.
5. Click **Save User** at the top of the page to finalize user creation.

Send Welcome Email

Edit User ▼

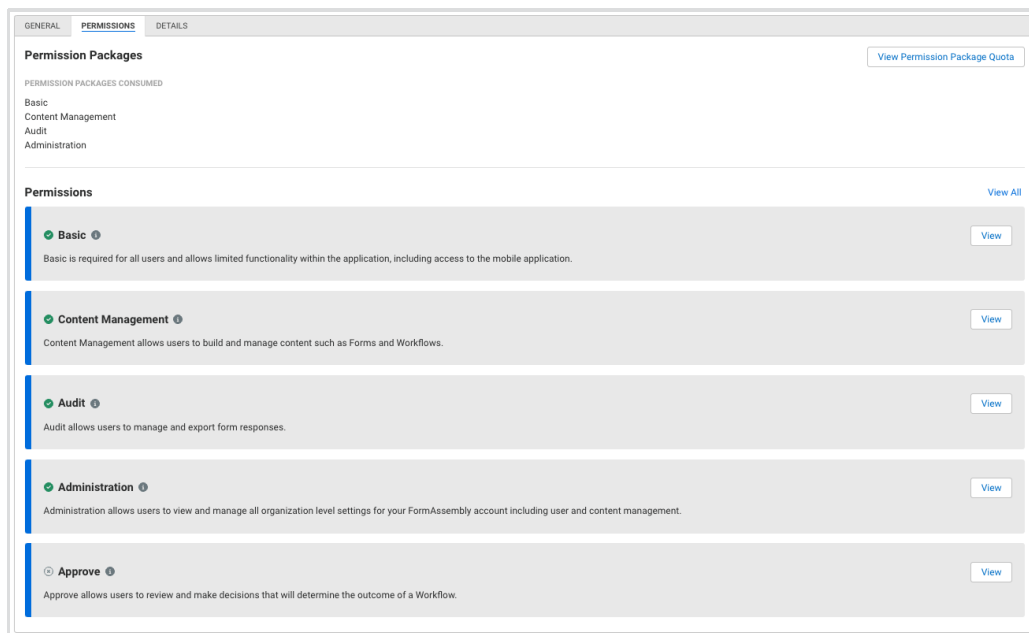
6. After the page refreshes, click **Send Welcome Email** to send an email to the user allowing them to create a password for their account. Once completed, the user can use the application immediately.

Note: The link within the welcome email expires after 72 hours. Click **Send Welcome Email** again to send a new email to the user, or instruct the user to select **"Forgot Password"** on the login page.

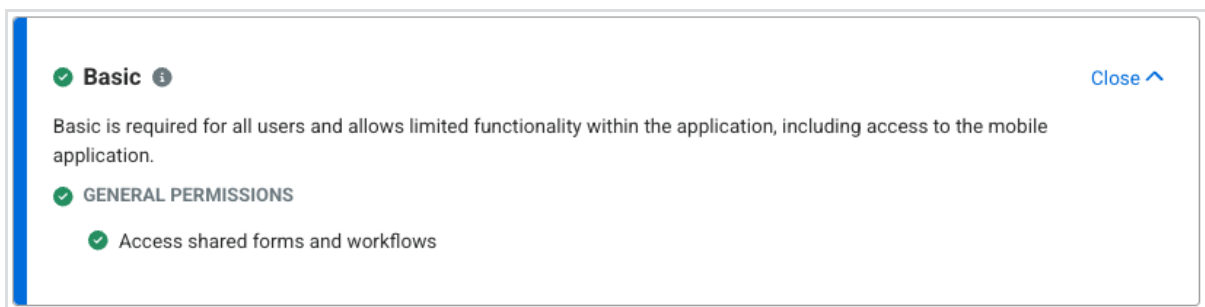
User Permissions

To add, remove, or edit user permissions, follow these steps.

1. On the left-side menu, select **User Management | All Users**
2. Locate the user within the **All Users** list.
3. Select the user and navigate to the **Permissions** tab.



4. The **Permissions** tab displays each of the available **Permission Packages**. You can apply any Permission Packages with an available quota to the user.
5. Once you have selected the Permission Packages that will apply to the user, you can expand them further by clicking **View**. This will expand the list of available permissions for fine-tuning, grouped by **Permission Sets**.



✔ Content Management ⓘ

Close ^

Content Management allows users to build and manage content such as Forms and Workflows.

✔ FORM PERMISSIONS

- ✔ Use Upload Fields in Forms
- ✔ Add HTML Code to Forms
- ✔ Add Custom Code to Forms
- ✔ Can use CSV datasets
- ✔ Configure Workflow Spam Protection
- ✔ Save & Resume
- ✔ Configure 'Review before submit' for Workflow Steps
- ✔ Create and modify forms
- ✔ Import images in form
- ✔ Configure Form Step Authentication
- ✔ Can use and create public datasets

✔ CONNECTORS

- ✔ CAS Prefill
- ✔ LDAP Prefill
- ✔ SAML Prefill
- ✔ HTTPS
- ✔ Configure Post Redirect

✔ BRANDING PERMISSIONS

- ✔ Customize Themes
- ✔ Create Themes
- ✔ Custom Form Branding

✔ SENSITIVE DATA

- ✔ Mark fields as containing payment information in form builder
- ✔ Mark fields as general sensitive data in Form Builder
- ✔ Mark fields as PII in Form Builder
- ✔ Mark fields as PHI in Form Builder

✔ PROCESSING PERMISSIONS

- ✔ Setup Email Notifications
- ✔ Customize email notifications
- ✔ Use Auto-Responder
- ✔ Edit Form Properties
- ✔ Can use formulas
- ✔ Allow workflow processing
- ✔ Advanced Document Generation
- ✔ Enable E-Signature

✔ COLLABORATION PERMISSIONS

- ✔ Share own forms with other users
- ✔ Lookup user list when assigning permissions
- ✔ Can share form in the template library

✔ PUBLISHING PERMISSIONS

- ⓘ Must request publishing approval
- ✔ Can grant publishing approval
- ✔ Can use Advanced Workflow Publishing Tools

Premium Add-Ons

✔ SALESFORCE INTEGRATIONS

- ✔ Salesforce (Prefill)
- ✔ Salesforce Marketing Cloud Prefill
- ✔ Salesforce
- ✔ Salesforce Marketing Cloud
- ✔ Salesforce Dynamic Picklists (Advanced)

✔ MICROSOFT INTEGRATIONS

- ✔ Microsoft Excel
- ✔ Microsoft SharePoint

✔ AUTOMATION INTEGRATIONS

- ✔ Webhook

✔ CRM / MARKETING INTEGRATIONS

- ✔ HubSpot

✔ PAYMENT INTEGRATIONS

- ✔ Authorize.Net Payment
- ✔ Chargent Payment
- ✔ CyberSource Payment
- ✔ Freshbooks
- ✔ iATS Payment
- ✔ PayPal Payment
- ✔ Stripe

✔ GOOGLE INTEGRATIONS

- ✔ Google Sheets
- ✔ Google Drive

✔ FILE STORAGE INTEGRATIONS

- ✔ Dropbox
- ✔ Box

Audit ⓘ

Close ^

Audit allows users to manage and export form responses.

AUDIT PERMISSIONS

- Allow user to perform searches over Workflow Responses
- Replay Workflow Responses
- Allow user to (re)index form responses for search manually
- Use RSS Feed
- View Workflow Charts
- Export Workflow Data

VIEW SENSITIVE DATA

- View fields containing payment information in Workflow Data and Reports
- View general sensitive data in Workflow Data and Reports
- View PII in Workflow Data and Reports
- View PHI in Workflow Data and Reports

Premium Add-Ons

ANALYTICS SUITE

- Access Analytics

Administration ⓘ

Close ^

Administration allows users to view and manage all organization level settings for your FormAssembly account including user and content management.

ADMIN PERMISSIONS

- Administrator access
- Can manage users
- Can manage user groups
- Allow administrator to access security settings
- Allow administrator to access user's data
- Allow administrator to assign admin permissions and edit admin users
- Can manage multi-factor authentication
- Allow administrator to reassign a form to another user (including oneself)
- Can manage purge settings and logs
- Can manage form identity providers

Approve ⓘ

Close ^

Approve allows users to review and make decisions that will determine the outcome of a Workflow.

APPROVE PERMISSIONS

- Can be assigned as an Approver
- Can manually override an Approval

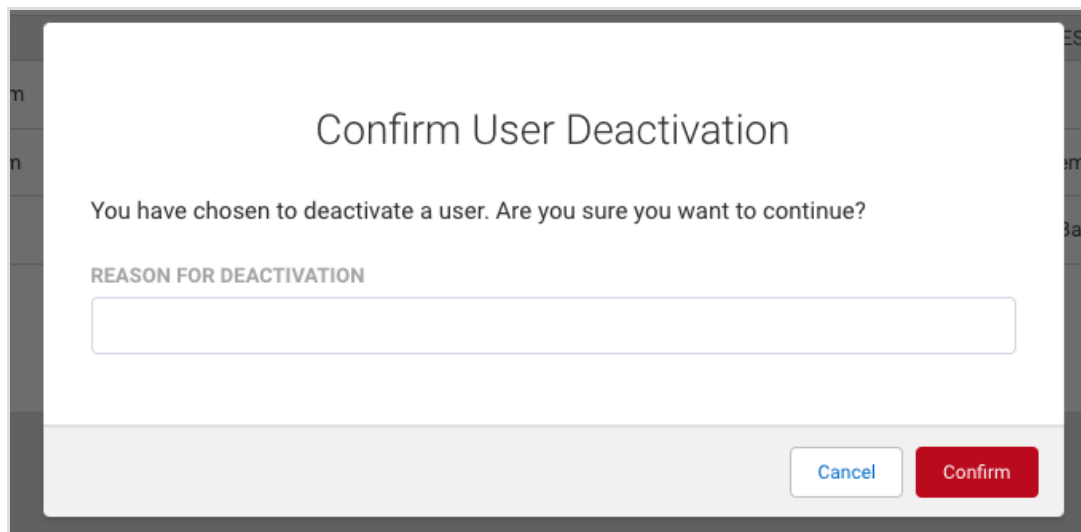
6. Selecting the checkbox on a Permission Package will also apply all related permissions to the user. You can then uncheck any permissions you would like to remove.

Deactivating a User

Note:

- Forms and responses belonging to a deactivated user are permanently deleted. To retain forms owned by a user you are planning to deactivate, reassign their forms to an active user before completing deactivation steps.
- If the user to be deactivated is a Collaborator on a form or workflow, remove the user from the [sharing options](#) on the form or workflow before deactivating the account; otherwise, issues may occur with the related form/workflow.
- A deactivated user may no longer log in and access their data.

1. On the left-side menu, select **User Management | All Users**
2. Locate the user within the **All Users** list or through the Search.
3. From the **View User** drop-down menu in the Actions column, select **Deactivate User**. This opens the **Confirm User Deactivation** modal.

A modal window titled "Confirm User Deactivation" with a light gray background. The title is centered at the top in a large, dark font. Below the title is a question: "You have chosen to deactivate a user. Are you sure you want to continue?". Underneath this is a label "REASON FOR DEACTIVATION" followed by a single-line text input field. At the bottom right of the modal are two buttons: a white "Cancel" button with a blue border and a red "Confirm" button with white text.

4. If the selected user does not own a form, enter a reason for the deactivation and click **Confirm**.

If the selected user is a form owner, select whether to transfer the user's forms to another user.

Note: Forms belonging to a deactivated user will no longer be available, and the application will no longer accept response submissions for those forms. You must move the forms to another active user before deactivating the owner.

Option 1 – Don't Transfer Any Forms

Confirm User Deactivation

The user you have chosen to deactivate still owns forms. Please note that any forms not selected for transfer will be permanently deleted and become inaccessible.

REASSIGN FORMS?

☐ Yes, I would like to transfer all forms owned by this user to another user
☒ No, delete all forms and associated response data owned by this user

REASON FOR DEACTIVATION

Cancel
Deactivate User

- Select **"No, delete all forms and associated response data owned by this user"**.
- Enter a reason for the deactivation and click Confirm to complete the user deactivation.

Option 2 – Bulk Transfer Forms to a New Owner

Note: This bulk transfer process transfers all forms from one user being deactivated to another user. You cannot pick and choose forms to transfer or divide ownership among several new owners using this method. If you would like to transfer ownership more granularly, please see the [Form Administration](#) article.

Confirm User Deactivation

The user you have chosen to deactivate still owns forms. Please note that any forms not selected for transfer will be permanently deleted and become inaccessible.

REASSIGN FORMS?

☒ Yes, I would like to transfer all forms owned by this user to another user
☐ No, delete all forms and associated response data owned by this user

TRANSFER FORM OWNERSHIP TO THIS USER *

Please Select

REASON FOR DEACTIVATION

Cancel
Confirm

- Select “**Yes, I would like to transfer all forms owned by this user to another user**”.
 - Select a new owner from the **TRANSFER FORM OWNERSHIP TO THIS USER** menu.
 - Enter a reason for the deactivation and click **Confirm** to complete the form transfer and user deactivation.
-

Editing a User

1. On the left-side menu, select **User Management | All Users**
 2. Locate the user within the **All Users** list or through the Search.
 3. Click **Edit** and proceed to make any necessary changes.
 4. Click **Apply** when finished.
-

Restoring a User

1. Locate the user on the **All Users** page.
 2. Click on the Username or select the **Edit** button for the desired user.
 3. In the **Details** tab, click the **Reactivate User** link.
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Changing/Replacing an Account Admin

If you need to change the admin listed on your account, you can edit your existing admin's information to update it. All FormAssembly forms will then be under the new admin's account. Please make sure that your new admin has access to your FormAssembly account before leaving your organization or changing roles.

You will also need to contact your Customer Success Manager so that we can update your account information in our customer database.
