

User Management and Licensing

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Overview

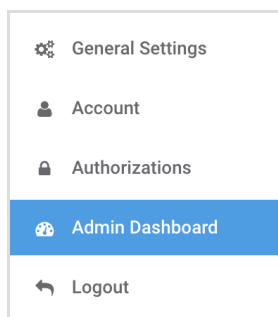
As an administrator of your FormAssembly instance, you can add, deactivate, restore, or edit users. You are also able to set and refine the permissions available to your users.

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.

Licensing & Usage

GENERAL

USAGE

ADD-ONS

i

To purchase more licenses please contact your Customer Success Manager or email sales@formassembly.com.
[Learn more about managing users and licensing](#)

PLAN

Team

LICENSES DEFINITION

Limited License
A limited license includes:

- 1 Basic Permission Package
- 1 Audit Permission Package

Standard License
A standard license includes:

- 1 Basic Permission Package
- 1 Content Management Permission Package
- 1 Administration Permission Package
- 1 Audit Permission Package

Approve License
An Approve license includes:

- 5 Basic Permission Packages
- 5 Approver Permission Packages
- 5 Audit Permission Packages

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

▼

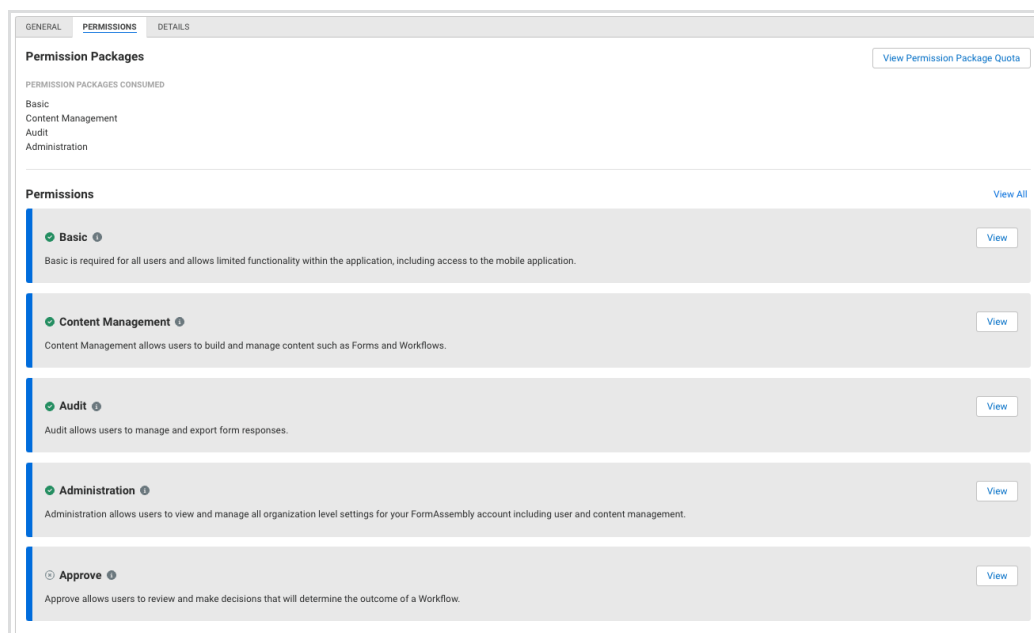
6. After the page refreshes, click **Send Welcome Email** to send an email to the user allowing them to create a password for their account. Once completed, the user can use the application immediately.

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.

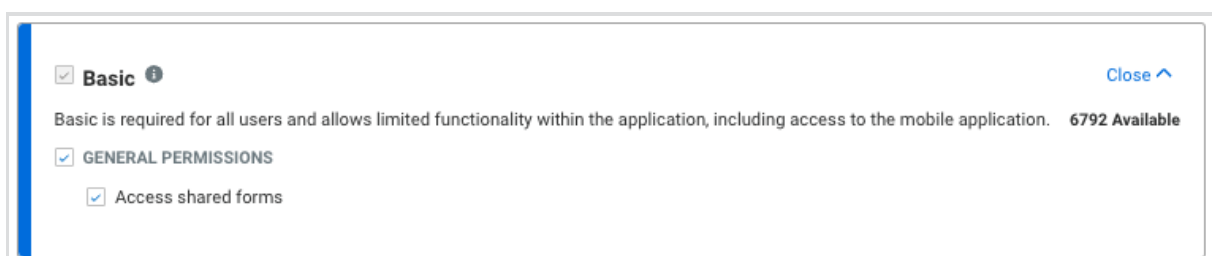
User Permissions

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.

809 Available

☐ FORM PERMISSIONS

- ☐ Use Upload Fields in Forms
- ☐ Add HTML Code to Form
- ☐ Add custom code to form
- ☐ Can use CSV datasets
- ☐ Use Captchas (spam protection)
- ☐ Enable 'Save and Resume' option
- ☐ Enable 'Review before submit' option
- ☐ Create and modify forms
- ☐ Import images in form
- ☐ Can require authentication on forms
- ☐ Enable E-Signature on forms
- ☐ Can use and create public datasets

☐ PROCESSING PERMISSIONS

- ☐ Setup Email Notifications
- ☐ Customize email notifications
- ☐ Use Auto-Responder
- ☐ Edit Form Properties
- ☐ Can use formulas
- ☐ Allow form processing on forms created by this user
- ☐ Can set purge settings for responses

☐ COLLABORATION PERMISSIONS

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

☐ CONNECTORS

- ☐ CAS (Prefill)
- ☐ LDAP (Prefill)
- ☐ SAML (Prefill)
- ☐ Google Sheets 2
- ☐ HTTPS
- ☐ Post Redirect

☐ PUBLISHING PERMISSIONS

- ☐ Must request publishing approval
- ☐ Can grant publishing approval
- ☐ Can use advanced publishing tools

☐ BRANDING PERMISSIONS

- ☐ Can customize themes
- ☐ Can 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 personally identifiable information in Form Builder

Premium Add-Ons

☐ SALESFORCE INTEGRATIONS

- ☐ Salesforce (Prefill)
- ☐ Salesforce Marketing Cloud (Prefill)
- ☐ Salesforce
- ☐ Salesforce Marketing Cloud
- ☐ Salesforce Dynamic Picklists

☐ PAYMENT INTEGRATIONS

- ☐ Authorize.net
- ☐ Chargent
- ☐ CyberSource
- ☐ Freshbooks
- ☐ IATS
- ☐ PayPal
- ☐ Stripe

☐ Audit ⓘ

[Close ^](#)

Audit allows users to manage and export form responses.

5801 Available

☐ AUDIT PERMISSIONS

- ☐ Allow user to perform searches over their response data
- ☐ Edit submitted responses
- ☐ Allow user to (re)index form responses for search manually
- ☐ Use RSS Feed
- ☐ View Charts
- ☐ Export Submitted Data
- ☐ View Form Analytics

☐ VIEW SENSITIVE DATA

- ☐ View fields containing payment information in responses and reports
- ☐ View general sensitive data in responses and reports
- ☐ View personally identifiable information in responses and reports

☐ **Administration** ⓘ
 Close ^

Administration allows users to view and manage all organization level settings for your FormAssembly account including user and content management. **821 Available**

☐ **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
- ☐ Force use of 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. **4987 Available**

☐ **APPROVE PERMISSIONS**

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

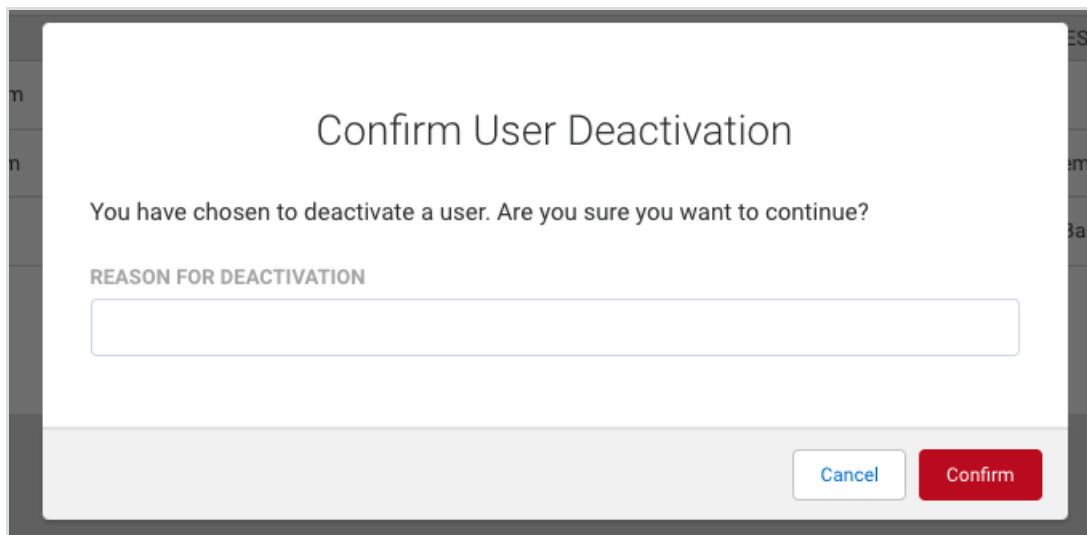
6. Selecting the checkbox on a Permission Package will also apply all related permissions to the user. You can then uncheck any permissions you would like to remove.

Deactivating a User

Note:

- Forms 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.
- 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.



Confirm User Deactivation

You have chosen to deactivate a user. Are you sure you want to continue?

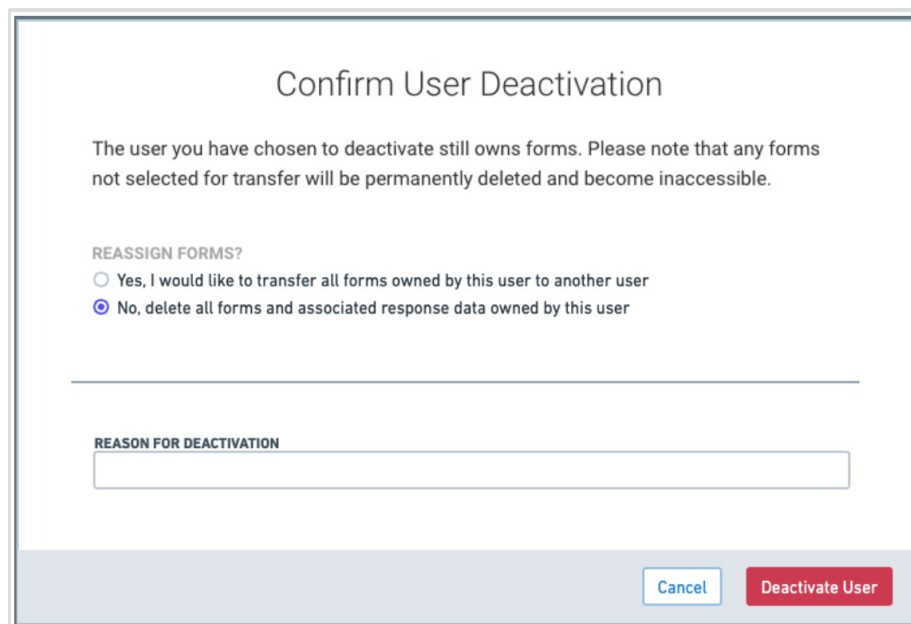
REASON FOR DEACTIVATION

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

- 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 *

REASON FOR DEACTIVATION

CancelConfirm

- 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.

Once the account is reactivated, all forms and all previously received responses will become available again.

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.
