

User Management and Licensing

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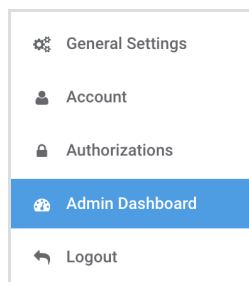
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Overview

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.

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"



Adding a User

1. Browse to: **Admin Dashboard | Users**
2. Click **Add New User** on the left side menu.

3. Set the Authentication Type to **FormAssembly**.

- A local database setting indicates that passwords are stored locally and the application authenticates users directly.
- If you would like to use SSO as your Authentication Type, please note that your FormAssembly username should match your SAML or Salesforce username.

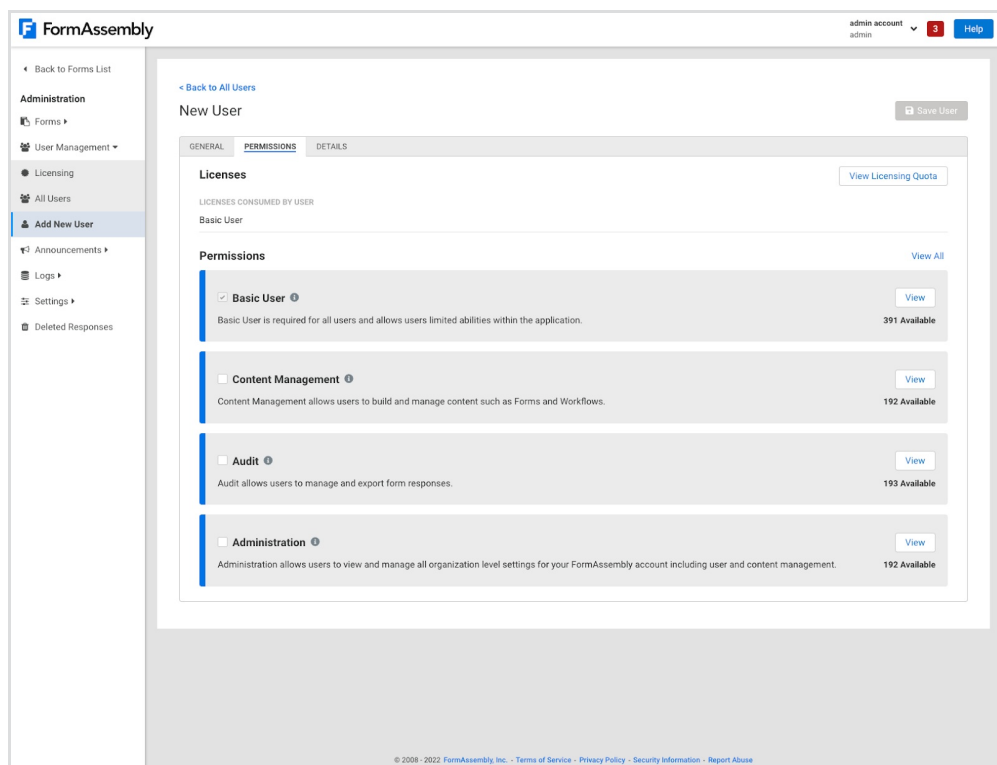
4. Fill in the **Contact** and **Company Information** sections.

5. Open the **Permissions** tab to add user permissions. To learn more, continue to the User Permissions section below.

User Permissions

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

1. Open **Admin Dashboard | Users** to begin.
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**.

The screenshot displays the 'New User' configuration page in FormAssembly. The interface includes a sidebar with navigation options such as 'Forms', 'User Management', and 'Add New User'. The main content area is titled 'New User' and features tabs for 'GENERAL', 'PERMISSIONS', and 'DETAILS'. The 'PERMISSIONS' tab is active, showing a list of permission packages. The 'Basic User' package is selected and expanded, revealing a detailed list of sub-permissions categorized into 'FORM PERMISSIONS', 'PROCESSING PERMISSIONS', 'COLLABORATION PERMISSIONS', 'PUBLISHING PERMISSIONS', 'CONNECTORS', 'BRANDING PERMISSIONS', 'SALESFORCE INTEGRATIONS', and 'PAYMENT INTEGRATIONS'. Other permission packages like 'Content Management', 'Audit', and 'Administration' are also visible but not expanded. A 'Save User' button is located at the top right of the main content area. The footer contains copyright information: '© 2008 - 2022 FormAssembly, Inc. - Terms of Service - Privacy Policy - Security Information - Report Abuse'.

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

Deactivating a User

1. Browse to: **Admin Dashboard | Users**
2. Select the user you would like to delete, either from the list or through the Search.
3. Click the **Deactivate** link.
4. Enter a reason for the deactivation and click **Confirm**.

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.
- A deactivated user may no longer log in and access their data.

Editing a User

1. Browse to: **Admin Dashboard | Users**
2. Select the user you would like to edit, either from the 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.

