

FormAssembly Licensing and Plans Update FAQ

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What is happening?

FormAssembly is introducing a new license called the Limited License. We are also changing the name of the existing, original FormAssembly License to the Standard License. Standard Licenses will now have configurable Permissions Packages (vs Roles). In addition, we are introducing a new user interface for an improved user management experience for admins. The new UI will also serve as the foundation for new functionality.

FormAssembly is also adding the option for Approver Licenses. Approver Licenses are similar to Standard Licenses but include permission packages focused on the [Workflow Approval](#) feature.

Why is licensing changing?

Customers have asked us to provide them with more control over their users' permissions and roles. Introducing Permissions Packages within licenses provides the ability to easily tailor users'

permissions and needs. In addition, we are introducing the new Limited License in response to customers' request to provide access to a basic sub-set of FormAssembly functionality, such as "view only" or "mobile only". The new Limited License offers a cost-effective way to provide access to users who do not require full access to FormAssembly functionality. The Standard License represents the original full-featured FormAssembly License but has additional control ability with the Permissions Packages.

What are Permission Packages?

A Permissions Package is a group of permissions. The new Permissions Packages are as follows:

Basic

- Ability to log in, access assigned forms, and use the FormAssembly mobile app.

Content Management

- Build and manage forms and workflows.

Audit

- Search and edit responses, and view reports.

Administration

- Access to the Admin Dashboard.

Approve

- Allows users to review and make decisions that will determine the outcome of a Workflow.

Each user must have Basic permissions to log in.

- The Limited License includes Basic and Audit permissions only.
- The Standard License includes the Basic Permissions Package and can be configured to include Content Management, Audit, and/or Administration Permissions Packages as needed.
- The Approver License includes the Basic Permissions Package, Audit Permissions Package, and Approve Permissions Package.

Once a set of permissions is applied, the Admin can further refine the permissions within that package from the User Page.

How are Permission Packages different than Roles?

Roles required the FormAssembly Admin to manually select and assign functionality to users from a list of over 70 options. Permissions Packages are sets of functionality that can be assigned with one click. Once a package is assigned to a user, the Admin has the option to further refine those permissions from the User Page. All FormAssembly Licenses will be converted to Standard Licenses and the permissions will be configured based on the existing Roles.

How does this affect my current user license agreement with FormAssembly?

Your current license agreement will remain the same. Your invoices will reflect the new license names, however, your contract, previous agreement, and pricing with FormAssembly will remain the same.

Will my pricing increase due to this update?

No. Your pricing and user license agreement will not be impacted by this update.

Is there anything that I need to do on my end before or after the rollout of the new licenses?

No. There is no need to update anything in preparation for the licensing rollout or following it. You may want to check out the new Admin user interface and review permissions for each of your users.

How do I know which license type to purchase?

It depends on what those users will be doing. The functionality of the Limited License enables users to log in to FormAssembly, use the FormAssembly mobile app, access assigned forms, search and edit responses, and view reports. The functionality of the Standard License provides users with access to a wider range of features that can be assigned per user, by the FormAssembly Admin. Your FormAssembly customer service rep can walk you through the licenses and permissions and help you make the best choices for your organization.

If I edit a current user to have different permissions will this affect my pricing?

No, changes to permissions will not change your pricing. You cannot distribute more permissions than what you have purchased.

How were my current users migrated to a specific license type?

Existing licenses will be converted to Standard Licenses and their assigned permissions at the time of conversion will be based on their existing Role. Admins can adjust permissions as needed.

Will I be able to identify users who previously were assigned to custom Roles prior to being converted to Permission Packages?

Roles are being replaced by Permissions Packages. After the migration, you will not be able to identify users by a Role assignment; however, your users will retain the selected permissions in their profiles that they had before the update.

Will there be an active count for the form "Admin" user to easily monitor who has what licensing within the product? (assigned vs. total)

Yes, you will see the License Definitions and Permissions Package counts when you navigate to Admin Dashboard > User Management > Licensing. You will also have the option to review a Permissions Package summary when you are in the Permissions Package assignment tab as you add a new user.

How do I purchase more users Standard or Limited?

To purchase additional Standard or Limited user licenses contact your FormAssembly Account Manager, Customer Success, or simply contact us at sales@formassembly.com.

What will the UI look like compared to how it looks now?

The UI improvements to your user management pages will make adding a new user more effortless and efficient, allowing you to quickly add User information and fine-tune user permissions. User searchability has also been enhanced with the ability to sort columns.

Will I need to contact support differently? Standard vs Limited.

No, this will only affect how permissions and user management are handled within the product. Generally, all Standard Licensed users can contact support directly, like before the update.
