

User Groups

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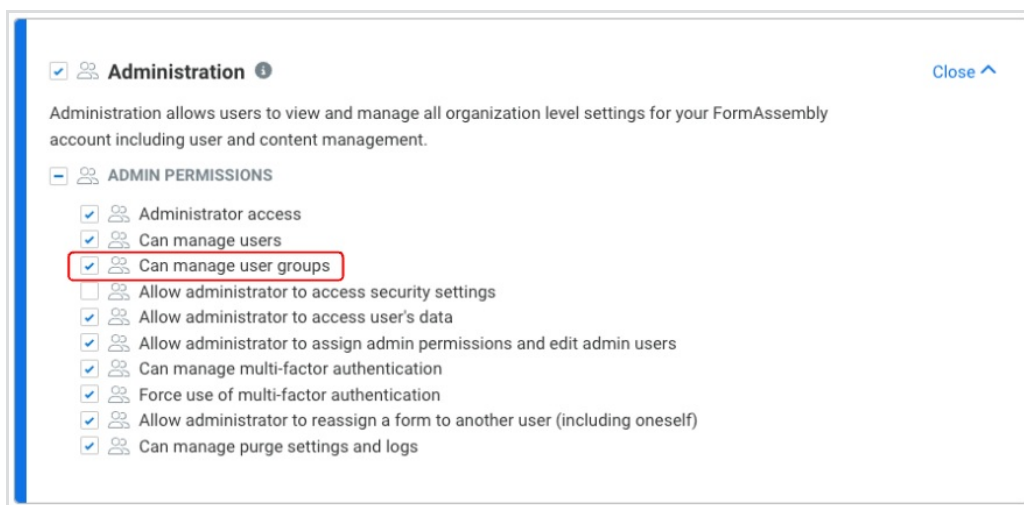
Overview

Instead of individually managing permissions for every user via the All Users list - a potentially time-consuming task for administrators with large user bases - our User Groups feature offers a more efficient method. With User Groups, you can establish a group with specific permissions, and then allocate users to this group. This enables bulk management of permissions, saving you valuable time and effort. It's important to note that User Groups will only enhance or add permissions; they will not remove or limit any already assigned permissions at the individual user level. This ensures that no user will inadvertently lose any pre-existing permissions.

For general information about managing individual user permissions, [please read our article on user management and licensing](#).

Getting Started

User Group Administration Permissions Setup



1. Open the **Admin Dashboard**

2. Under “User Management”, select **All Users**
3. Locate the user profile for the user(s) who will be authorized to create, edit, and delete user groups
4. **Edit** the user profile
5. Open the **Permissions** tab
6. View the permissions under the **Administration** permission package
7. Expand the section for **Admin Permissions**, if not already expanded
8. Select the checkbox for “**Can manage user groups**”
9. Click **Save**

Accessing User Groups

- Browse to: **Admin Dashboard | User Management**
- Click **User Groups**

GROUP NAME	GROUP DESCRIPTION	GROUP MEMBERS	ACTIONS
Product Team		8	View User Group ▼
Sales		8	View User Group ▼
Add-ons	All add-ons enabled	2	View User Group ▼

Create a New User Group

- Click **+ Create New User Group**
- [Configure the user group General, Permissions, and Members settings](#)
- Click **Save User Group** when complete

Edit an Existing User Group

- Find the group you want to edit, and hover over or click the dropdown button in the Actions column
- Select **Edit User Group**
- [Adjust the configured user group General, Permissions, and Members settings](#)
- Click **Save User Group** when complete

or

- Find the group you want to edit, and click **View User Group**
- Click **Edit User Group**
- [Adjust the configured user group General, Permissions, and Members settings](#)
- Click **Save User Group** when complete

Delete a User Group

- Find the group you want to delete, and hover over or click the dropdown button in the Actions column
- Select **Delete User Group**
- Confirm you want to delete the group by clicking the red **Delete User Group** button

or

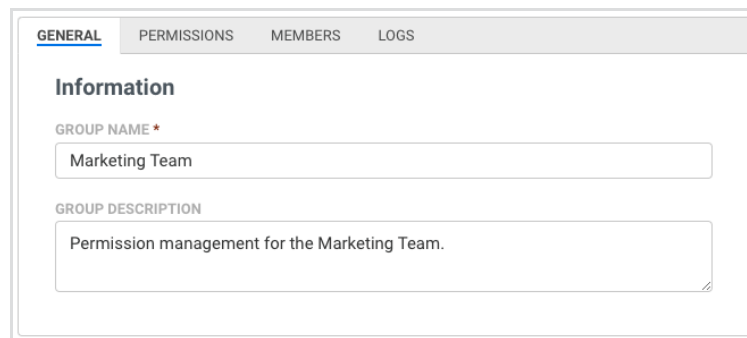
- Find the group you want to delete, and click **View User Group**
- Hover over or click the dropdown button next to the Edit User Group button
- Click **Delete User Group**
- Confirm you want to delete the group by clicking the red **Delete User Group** button

Note: Deleting a user group will not delete any user accounts; group deletion will only remove any permissions granted to a group member by the deleted group only.

User Group Configuration

General Tab

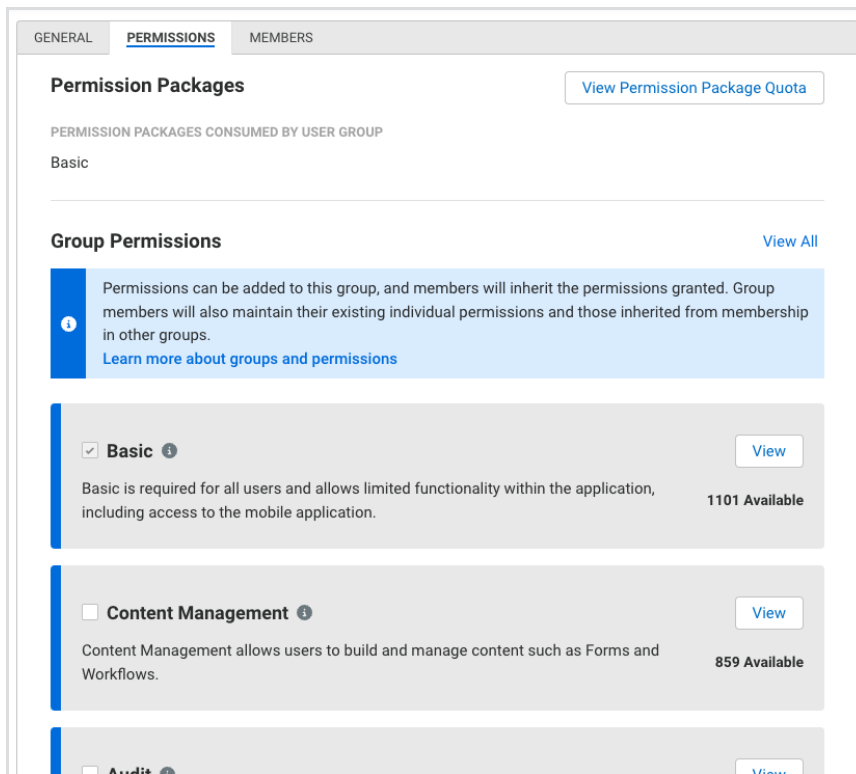
The General tab is where you define what the group is and what it is for with a Group Name and a Group Description. All groups require a name.



The screenshot shows a web interface for configuring a user group. At the top, there are four tabs: GENERAL (selected), PERMISSIONS, MEMBERS, and LOGS. Below the tabs, the 'Information' section contains two input fields. The first is labeled 'GROUP NAME *' and contains the text 'Marketing Team'. The second is labeled 'GROUP DESCRIPTION' and contains the text 'Permission management for the Marketing Team.'.

Permissions Tab

The Permissions tab is where you set the permissions the group will grant to the group members.



Permission Packages

- **View Permission Package Quota** - Click this button to view a summary of all permission packages and their quantities available to your FormAssembly instance.

Permission Packages Summary

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

PERMISSION PACKAGE	PURCHASED	CONSUMED*	PENDING
Basic	1249	148	0
Content Management	999	140	0
Audit	1249	131	0
Administration	999	134	0
Approve	250	20	0

Ok

- **Permission Packages Consumed by User Group** - Permission package names assigned within the current group you are viewing or configuring are listed here (Basic, Content Management, Audit, Administration, and Approve).

Group Permissions

When editing Group Permissions, select the checkbox associated with the permission pack to apply all permissions within the package to the user group, or click the View button to expand the permission package and customize which of the individual permissions within the package to include or exclude. Once the user group is saved, review the group permissions included (marked by green check icons) and excluded (marked with grey 'x' icons).

Content Management ⓘ
Close ^

Content Management allows users to build and manage content such as Forms and Workflows. **859 Available**

<input checked="" type="checkbox"/> FORM PERMISSIONS <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Use Upload Fields in Forms <input checked="" type="checkbox"/> Add HTML Code to Form <input checked="" type="checkbox"/> Add custom code to form <input checked="" type="checkbox"/> Can use CSV datasets <input checked="" type="checkbox"/> Use Captchas (spam protection) <input checked="" type="checkbox"/> Enable 'Save and Resume' option <input checked="" type="checkbox"/> Enable 'Review before submit' option <input checked="" type="checkbox"/> Create and modify forms <input checked="" type="checkbox"/> Import images in form <input checked="" type="checkbox"/> Can require authentication on forms <input checked="" type="checkbox"/> Enable E-Signature on forms <input checked="" type="checkbox"/> Can use and create public datasets 	<input type="checkbox"/> PROCESSING PERMISSIONS <ul style="list-style-type: none"> <input type="checkbox"/> Setup Email Notifications <input type="checkbox"/> Customize email notifications <input type="checkbox"/> Use Auto-Responder <input type="checkbox"/> Edit Form Properties <input type="checkbox"/> Can use formulas <input type="checkbox"/> Allow form processing on forms created by this user <input type="checkbox"/> Can set purge settings for responses
<input type="checkbox"/> CONNECTORS	<input type="checkbox"/> COLLABORATION PERMISSIONS <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Share own forms with other users <input type="checkbox"/> Lookup user list when assigning permissions <input type="checkbox"/> Can share form in the template library

View when configuring or editing permissions

Content Management ⓘ
Close ^

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

<input checked="" type="checkbox"/> FORM PERMISSIONS <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Use Upload Fields in Forms <input checked="" type="checkbox"/> Add HTML Code to Form <input checked="" type="checkbox"/> Add custom code to form <input checked="" type="checkbox"/> Can use CSV datasets <input checked="" type="checkbox"/> Use Captchas (spam protection) <input checked="" type="checkbox"/> Enable 'Save and Resume' option <input checked="" type="checkbox"/> Enable 'Review before submit' option <input checked="" type="checkbox"/> Create and modify forms <input checked="" type="checkbox"/> Import images in form <input checked="" type="checkbox"/> Can require authentication on forms <input checked="" type="checkbox"/> Enable E-Signature on forms <input checked="" type="checkbox"/> Can use and create public datasets 	<input type="checkbox"/> PROCESSING PERMISSIONS <ul style="list-style-type: none"> <input type="checkbox"/> Setup Email Notifications <input type="checkbox"/> Customize email notifications <input type="checkbox"/> Use Auto-Responder <input type="checkbox"/> Edit Form Properties <input type="checkbox"/> Can use formulas <input type="checkbox"/> Allow form processing on forms created by this user <input type="checkbox"/> Can set purge settings for responses
<input type="checkbox"/> CONNECTORS	<input checked="" type="checkbox"/> COLLABORATION PERMISSIONS <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Share own forms with other users <input type="checkbox"/> Lookup user list when assigning permissions <input type="checkbox"/> Can share form in the template library

View when viewing saved permissions

Members Tab

Control who is a part of the user group within the Members tab.

Group members are listed within the Members table with their Status, Username, Email, First Name, Last Name, and **all** Permission Packages that are assigned to the user (including permission packages assigned outside of this user group).

Add Users

While editing the Members tab, search for and select users from the Add Users list. Selected group members will appear beneath the Add Users list with the option to remove them by clicking their associated 'x'.

Note: Removing a group member will not delete their user account.

GENERAL PERMISSIONS **MEMBERS** LOGS

Members

Add users who will become members of this group upon Save.

ADD USERS

🔍 Search Users

Lauren Johnson lauren.john... ✕

STATUS	USERNAME	EMAIL	FIRST NAME	LAST NAME	PERMISSION PACKAGES
	lauren.johnson@formassembly.com	lauren.johnson@formassembly.com	Lauren	Johnson	Administration, Audit, Basic, Content Management

User Group Logs

Once a User Group is created and saved, a new Log tab is available when viewing or editing a user group. This log lists the updates made to the user group, such as when the group was created, when permissions are changed, and when group members are updated. The log indicates when the changes took place and what user account made the change.

GENERAL PERMISSIONS MEMBERS **LOGS**

Logs

07/21/2023 2:03 PM EDT	Group members updated by User ID 150
07/21/2023 2:00 PM EDT	Group permissions updated by User ID 150
07/21/2023 2:00 PM EDT	Group members updated by User ID 150
07/20/2023 12:45 PM EDT	Group permissions updated by User ID 150
07/20/2023 12:20 PM EDT	Group permissions updated by User ID 150
07/20/2023 12:20 PM EDT	Group members updated by User ID 150
07/19/2023 12:36 AM EDT	Group created by User ID 150

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