Workflow Collaboration

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Introduction

From the Collaboration tab in the Workflow Properties Panel, workflow owners may share their workflow with others or transfer workflow ownership to another user. Adding collaborators to a workflow allows a workflow owner to easily share the management workload, giving other team members access to assist with workflow editing and response review.

Access the Collaboration Tab

- Open your workflow in the workflow builder
- Click the **Workflow Properties** icon in the top right corner of the builder
- Select the **Collaboration** tab

Add a Collaborator

- In the **Collaboration** tab, search for or select a user or group from the **Share With Users and Groups** searchable dropdown
- The selected user or group is added to the **Current Access** list with a pending status
- Select an **Access Level** for the added user or group:
  - **Editor** - Can edit the workflow, but cannot view responses
  - **Auditor** - Can view responses, but cannot edit the workflow
  - **Manager** - Can both edit the workflow and view responses
- **Save** the workflow to save changes

Access Levels Explained

Editor

- **Can**:
  - Edit, add, and delete workflow steps
  - Configure workflow step settings
  - View the Publishing page
  - Edit Save & Resume configuration within Form Properties (workflow-specific settings only)

- **Cannot**:
    - View or access the Responses page
    - View submitted response data

Auditor

- **Can**:
    - View the Responses page
    - View submitted response data
    - Export responses (if they have export permissions)
- **Cannot**:
    - Access the workflow builder
    - Edit the workflow

Manager

- **Can**:
    - All Editor abilities (edit workflow, configure steps)
    - All Auditor abilities (view and export responses)
- **Cannot**:
    - Manage collaborators
    - Transfer workflow ownership

Collaborator Restrictions

All collaborators, regardless of access level, **cannot**:

- Manage collaborators
- Transfer workflow ownership

Only one user can edit a workflow at a time. If another user is already editing the workflow, any other users attempting to access the workflow will see a message indicating who is currently editing the workflow.

To add a form to a workflow, a user must have **ownership or edit access** granted to the form they wish to add. If the user does not have this access, they cannot look up or add the form as a Form Step.

> **Note**: Granting a user access as a collaborator to a workflow does not apply collaborator access to forms within that workflow.

Collaborator access to a workflow grants a user **view-only access** to the workflow's forms only while within the workflow builder. If edit access to a form is needed, collaborators must contact the form owner, listed in the blue information panel on the Configure or Form Availability tabs, to request access.

Remove a Collaborator

- In the **Current Access** list, click **Revoke Access** next to the user or group you want to remove
- **Save** the workflow to save changes

The user or group will lose all access to the workflow.

Transfer Workflow Ownership

Transfer Process

- Click **Transfer Ownership** next to the owner listed in the **Current Access** list
- The **Workflow Ownership Transfer Confirmation** modal opens
- Search for or select a user from the searchable dropdown
- Click **Transfer** to confirm the ownership transfer
- **Save** the workflow to complete the ownership transfer

Important Notes About Transfers

- The transfer enters a pending state until you save the workflow
- This allows you to make additional changes to the workflow before completing the transfer
- The new owner receives full ownership rights