

Workflow Collaboration

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Introduction

From the workflow Collaboration page, 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 workflow management workload by allowing other members of their team to assist with workflow editing and response review.

Collaboration Save

APPLICANT WORKFLOW

The table lists all users and groups with workflow access. Add more collaborators from the dropdown, or manage access in the table.

SHARE WITH USERS AND GROUPS

Q Search users and groups ▼

Current Access

USERS AND GROUPS	ACCESS	ACTIONS
Lauren Johnson	Owner	Transfer ownership
Evaluators - Test (pending)	Can edit	Revoke access

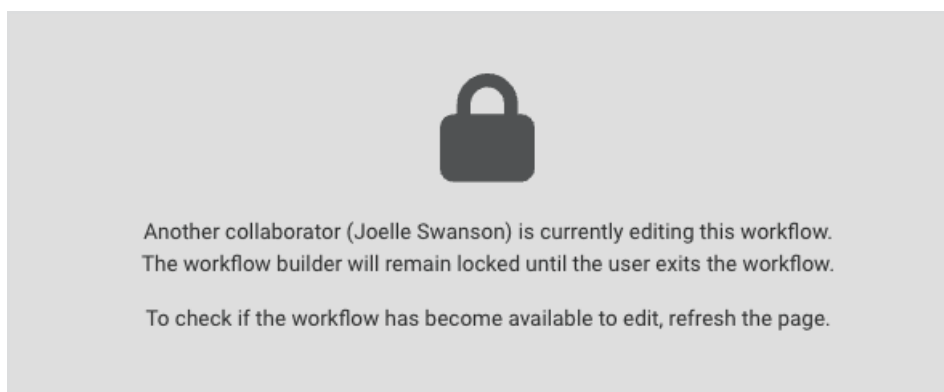
Allow Another User to Edit Your Workflow and Access Submitted Responses

Workflow owners can share their workflows with other users or [user groups](#).

- 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 pending “Can edit” access
- Click **Save** in the top right to save changes

Collaborator Abilities and Limits

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.



Collaborator Abilities

- Edit/Delete Steps
- View Responses
- View the Publishing Page

Collaborator Restrictions

- Cannot delete the workflow
- Cannot delete responses
- Cannot manage collaborators
- Cannot transfer workflow ownership

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

Granting a user access as a collaborator to a workflow does not apply collaborator access to forms that are a part of the workflow. Collaborator access to a workflow grants a user view-only access to the forms of a workflow **only while within the workflow builder**. Within the configuration panel of a form step, a collaborator can edit the Save and Resume configuration, as this only affects the Save and Resume behavior within the workflow. Other configuration options modify the behavior of the form globally on the instance (outside the scope of just the workflow), so collaborators cannot edit these settings.

Form Properties

DESCRIPTION

CONFIGURE

FORM AVAILABILITY

ASSIGNMENT

PREFILL

Form

Select the next form in your workflow.

i

Some configuration options are disabled because you do not currently have access to the Form selected. Contact the form owner (Joelle Swanson) to grant you access if you wish to make changes.

FORM *

X Mortgage Co-Applicant Application

Additional Options

Changes made in this section will be applied everywhere this form is published, except for Save & Resume. Save & Resume settings apply independently to this workflow and will not impact form level settings or any other workflows.

[Learn more about additional options](#)

IP ANONYMIZATION

☐ Anonymize respondent IP addresses for this form. ?

OPTIONAL PROCESSING FEATURES

☐ Allow respondents to review their response before a final submit. ?

SAVE & RESUME

☐ Allow respondents to save their progress and resume the form later. ?

SPAM FILTER OPTIONS

☐ Use google reCAPTCHA (A challenge that helps prevent spam). ?

E-SIGNATURE

☐ Enable E-Signature

Notice: Because E-Signature Records must be retrievable by the respondent, all E-Signature Records are stored indefinitely. If you have any questions or concerns, please contact Support.

Delete Step

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 from a Workflow

- Click the **Revoke Access** button to remove edit access for a user in the **Current Access** list
- Click **Save** in the top right to save changes

Transfer Workflow Ownership

- Click the **Transfer Ownership** button 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 complete the ownership transfer

Workflow Ownership Transfer Confirmation

You have chosen to transfer ownership of this workflow, **Approval**.

TRANSFER OWNERSHIP TO THIS USER

× Kayla Condello | kayla@formassembly.com ▼

Cancel

Transfer