Grant Access Feature

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In this Article

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Overview

The Grant Access Feature in FormAssembly can be used to accomplish two functions. First, if your organization is in need of support from the FormAssembly team, you can grant access to your forms so that we can better troubleshoot any issues you might be facing.

Second, as an Enterprise Administrator, you can decide the level of access you will have to your users' forms. You can either choose to be able to use the Admin Override function to log in as any of your users, or you can choose to use the Grant Access Feature where your users would need to give you permission to access their forms.

Details on how to enable and disable this feature can be found in the follow section.

Requirements

| Enterprise | Compliance Cloud |

For information on upgrading, please contact our Sales Department at sales@formassembly.com.

Enabling or Disabling the Grant Access Feature

When working with the Grant Access feature, you will need to visit your Admin Dashboard to enable or disable the feature.

Under the Admin Dashboard, go to **Settings → Miscellaneous** and then under **Privacy Settings** you can set the feature to be "on" or "off." If the feature is off, you will be able to login as any of your users without them needing to grant you access.

Privacy Settings

ADMINISTRATOR CANNOT LOG AS ANOTHER USER WITHOUT AN INVITATION

on ⬍

Set to ON to require invitations for user substitution.

Additionally, if you would like to be able to access your users' forms without permission being needed, you will need to go to **Settings → User Roles → Administrator** and make sure that the box is checked next to **Allow administrator to access user's data.**

Please ensure that you have clicked **Apply** after making changes to either of these settings.

Getting Started

To begin, use the dropdown Help menu at the top right of FormAssembly to select **Grant Access**.
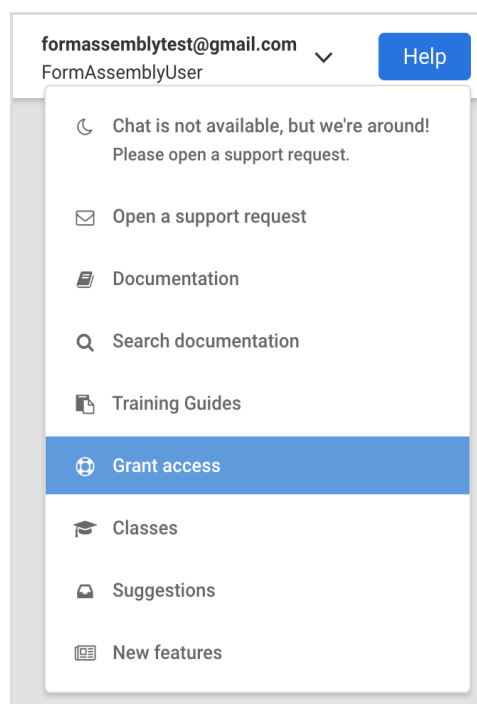
You will be taken to the Grant Access page where you will see two options: Administrator Support and FormAssembly Support.

If your users need to grant you access, as an Enterprise administrator, they would select **Go to Administrator Support**.

If you or your users need to grant access to FormAssembly in order to help troubleshoot an issue, you should select **Go to FormAssembly Support**

Grant access to my account

FormAssembly offers two ways for you to allow others to access your account for support.

Administrator Support

You may grant administrators access to your account. The administrators will be able to access your account and act "as you" for a limited time.

Go to Administrator Support

FormAssembly Support

You may grant FormAssembly Support access to your account.

We will be able to securely log in to your account and act "as you" for a limited time.

Go to FormAssembly Support

If you have selected that permission is not required for administrators to log in as users, your users will not see the Administrator Support option.

Granting Administrator Access

Once you click on **Go to Administrator Support** you will be taken to the Administrator Support screen, where your users will be able to select how many days account access will be granted (3, 5, 15, or 30 days). Once that selection has been made, they will need to confirm their password and click the **Grant Access** button.
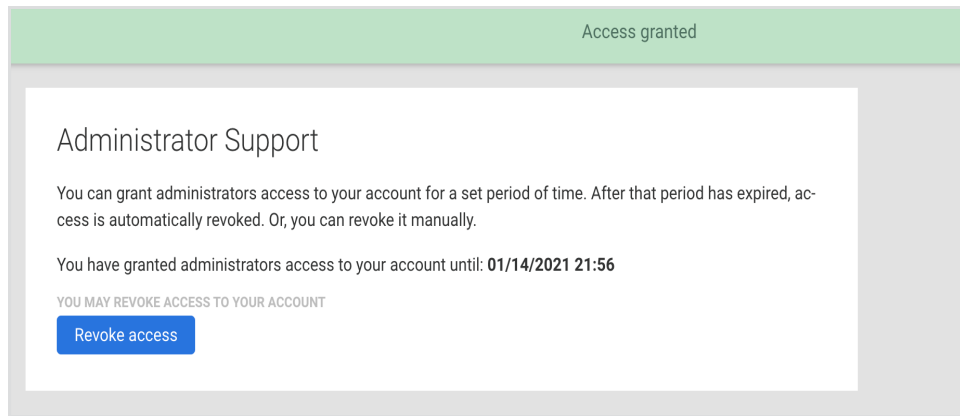

GRANT ACCESS TO YOUR ACCOUNT FOR:

✓ 3 Days
5 Days
15 Days
30 Days

Provided the user's password is correct, they will be taken to the confirmation screen which will give the date that administrator access has been provided until. The user can choose to revoke this access at any time by clicking the **Revoke Access** button.
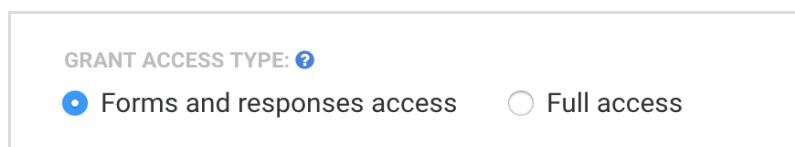
Access granted

Administrator Support

You can grant administrators access to your account for a set period of time. After that period has expired, access is automatically revoked. Or, you can revoke it manually.

You have granted administrators access to your account until: **01/14/2021 21:56**

YOU MAY REVOKE ACCESS TO YOUR ACCOUNT

[Revoke access]

Granting FormAssembly Access

For Enterprise Cloud customers, if the need arises for you to grant the FormAssembly support team access to your account, you can do so by clicking the **Go to FormAssembly Support** button.

Next, you will need to select the number of days (3, 5, 15, or 30) that access will be granted for.

GRANT ACCESS TO YOUR ACCOUNT FOR:

✓ 3 Days
5 Days
15 Days
30 Days
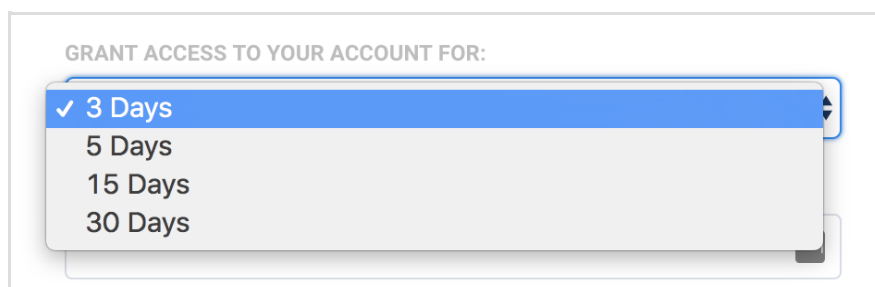
You will also need to select the access type. Selecting **Forms and Responses** will grant access to your forms, connectors, notifications, processing options, and form responses. Selecting **Full Access** will grant access to all of these options plus the Admin Dashboard (if you are an administrator), General Settings, and Account Pages.

GRANT ACCESS TYPE: ?

● Forms and responses access   ○ Full access

Once that has been selected, you will need to enter your FormAssembly password and click the **Grant Access** button to give access to the FormAssembly support team access.

FormAssembly Support

You can grant FormAssembly support access to your account for a set period of time. After that period has expired, access is automatically revoked. Or, you can revoke it manually.

GRANT ACCESS TO YOUR ACCOUNT FOR:

1 Day	⬍

FOR SECURITY, PLEASE CONFIRM YOUR PASSWORD:

[   ]

Grant access

> **Note**: If you are a Single Sign-On (SSO) user through Salesforce, you will not be required to enter your password during this step.

Once access has been granted to FormAssembly, you will be able to see your current access grants at the bottom of the page. You can also choose to revoke access should you need to.

You have granted FormAssembly Support access to your account.

GRANTED	EXPIRES	ACCESS CODE	ACCESS LEVEL	ACTIONS
10/04/2017 17:45	10/07/2017 17:45	443d9e07-a2fa-4ca6-8e3f-494a96ef5786	Forms & responses ❓	Revoke access

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FormAssembly Access Request

Our support team may also request access through our in-app support chat. If you are in need of assistance or troubleshooting, our support team can send you a direct link to grant access to your account.
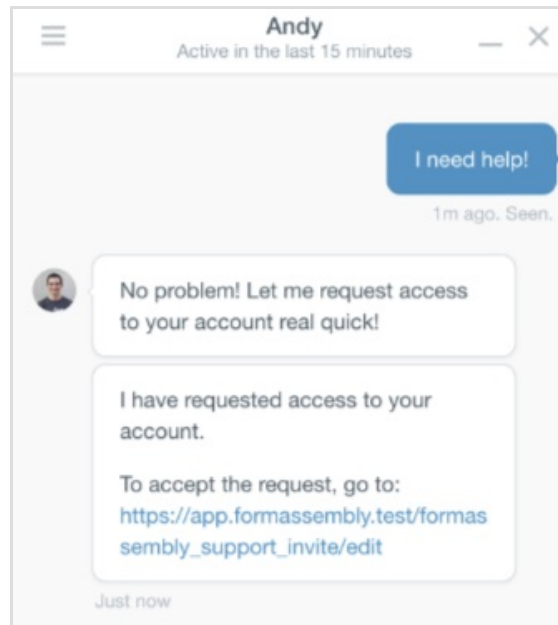
Once you click on the link, you'll be taken to Grant Access page where you'll be able to see any pending Access Requests. Simply enter your password and choose **Accept**, or choose Deny if you do not wish to grant access.

Once you have granted access, you will see the green Access Granted banner across the top of the page and you will see that the a new Access Grant has been added to your list of Current Access Grants at the bottom of the page.

From there, the FormAssembly support team will be able to access your account to further assist you with any troubleshooting.

Reviewing Access Grants

If you are an administrator and you need to review the active Access Grants for your instance, they are accessible

on the Admin Dashboard sidebar. You have a dropdown menu labeled **Access Grants** from which you can view both Admin Support grants and FormAssembly Support grants.

| 🛟 Access Grants ▾ |
| 🛟 Admin Support |
| 🛟 FormAssembly Support |