User Management

In this Article

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Overview

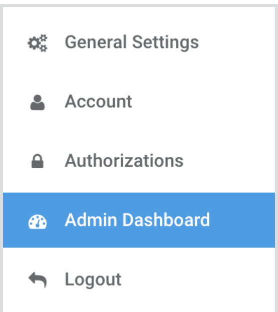
As an administrator of your FormAssembly instance, you can add, deactivate, restore, or edit users. You are also able to set and refine the permissions available to your users.

Requirements

- Administration permissions must be enabled for your user account.

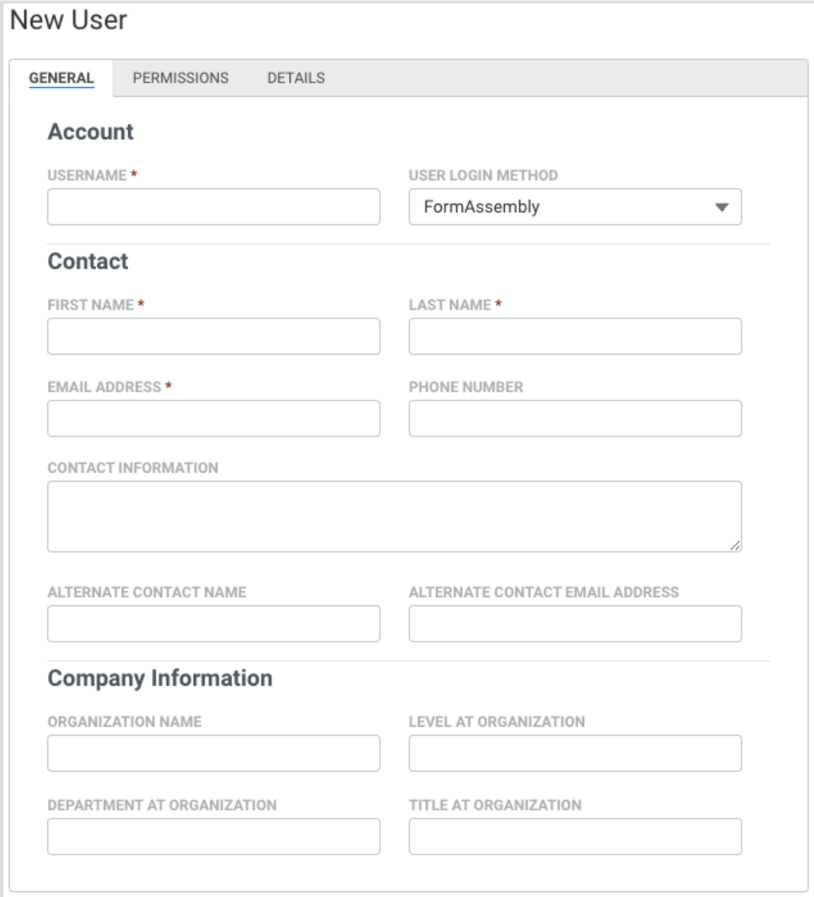
Accessing the Admin Dashboard

To perform the tasks below, you will need access to the Admin Dashboard. This can be found by going to the dropdown menu next to your name, at the top of the FormAssembly app. From here, you'll be able to select "Admin Dashboard".



Adding a User

1. On the left-side menu, select **User Management | Add New User**



2. Select a login method from the following User Login Method dropdown options:
   - **FormAssembly**: The standard FormAssembly account login method uses your FormAssembly username and password.
   - **SAML**: Uses your configured SAML identity provider as the login method.
     - To configure SAML for your instance, refer to our SAML authentication article.

   > **Note**: If an Instance Login Method is configured to an option other than "Manage via user's settings", the User Login Method will be locked to the option set on the Security page. For more details, refer to the Instance Login Method article.

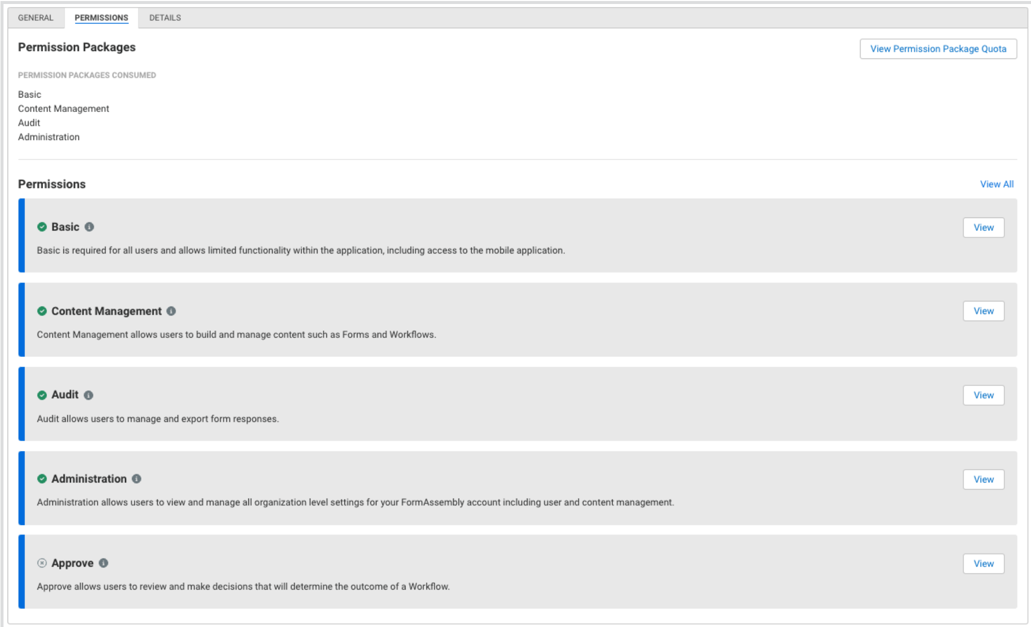
3. Fill in the **Contact** and **Company Information** sections.
4. Open the **Permissions** tab to add user permissions. To learn more, continue to the User Permissions section below.
5. Click **Save User** at the top of the page to finalize user creation.
6. After the page refreshes, click **Send Welcome Email** to send an email to the user, allowing them to create a password for their account. Once completed, the user can use the application immediately.

> **Note**: The link within the welcome email expires after 72 hours. Click **Send Welcome Email** again to send a new email to the user, or instruct the user to select "**Forgot Password**" on the login page.

User Permissions

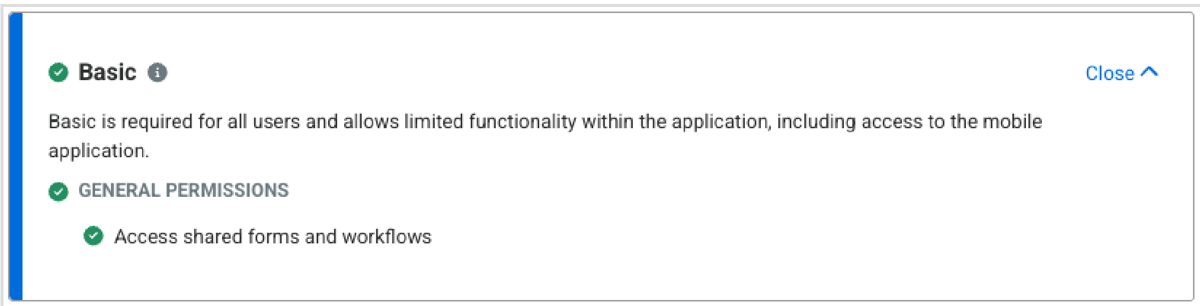
To add, remove, or edit user permissions, follow these steps.

1. On the left-side menu, select **User Management | All Users**
2. Locate the user within the **All Users** list.
3. Select the user and navigate to the **Permissions** tab.



4. The **Permissions** tab displays each of the available **Permission Packages**. You can apply any Permission Packages with an available quota to the user.

5. Once you have selected the Permission Packages that will apply to the user, you can expand them further by clicking **View**. This will expand the list of available permissions for fine-tuning, grouped by **Permission Sets**.



Content Management

Close

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

FORM PERMISSIONS

- Use Upload Fields in Forms
- Add HTML Code to Forms
- Add Custom Code to Forms
- Can use CSV datasets
- Configure Workflow Spam Protection
- Save & Resume
- Configure 'Review before submit' for Workflow Steps
- Create and modify forms
- Import images in form
- Configure Form Step Authentication
- Can use and create public datasets

CONNECTORS

- CAS Prefill
- LDAP Prefill
- SAML Prefill
- HTTPS
- Configure Post Redirect

BRANDING PERMISSIONS

- Customize Themes
- Create Themes
- Custom Form Branding

SENSITIVE DATA

- Mark fields as containing payment information in form builder
- Mark fields as general sensitive data in Form Builder
- Mark fields as PII in Form Builder
- Mark fields as PHI in Form Builder

PROCESSING PERMISSIONS

- Setup Email Notifications
- Customize email notifications
- Use Auto-Responder
- Edit Form Properties
- Can use formulas
- Allow workflow processing
- Advanced Document Generation
- Enable E-Signature

COLLABORATION PERMISSIONS

- Share own forms with other users
- Lookup user list when assigning permissions
- Can share form in the template library

PUBLISHING PERMISSIONS

- Must request publishing approval
- Can grant publishing approval
- Can use Advanced Workflow Publishing Tools

Premium Add-Ons

SALESFORCE INTEGRATIONS

- Salesforce (Prefill)
- Salesforce Marketing Cloud Prefill
- Salesforce
- Salesforce Marketing Cloud
- Salesforce Dynamic Picklists (Advanced)

MICROSOFT INTEGRATIONS

- Microsoft Excel
- Microsoft SharePoint

AUTOMATION INTEGRATIONS

- Webhook

CRM / MARKETING INTEGRATIONS

- HubSpot

PAYMENT INTEGRATIONS

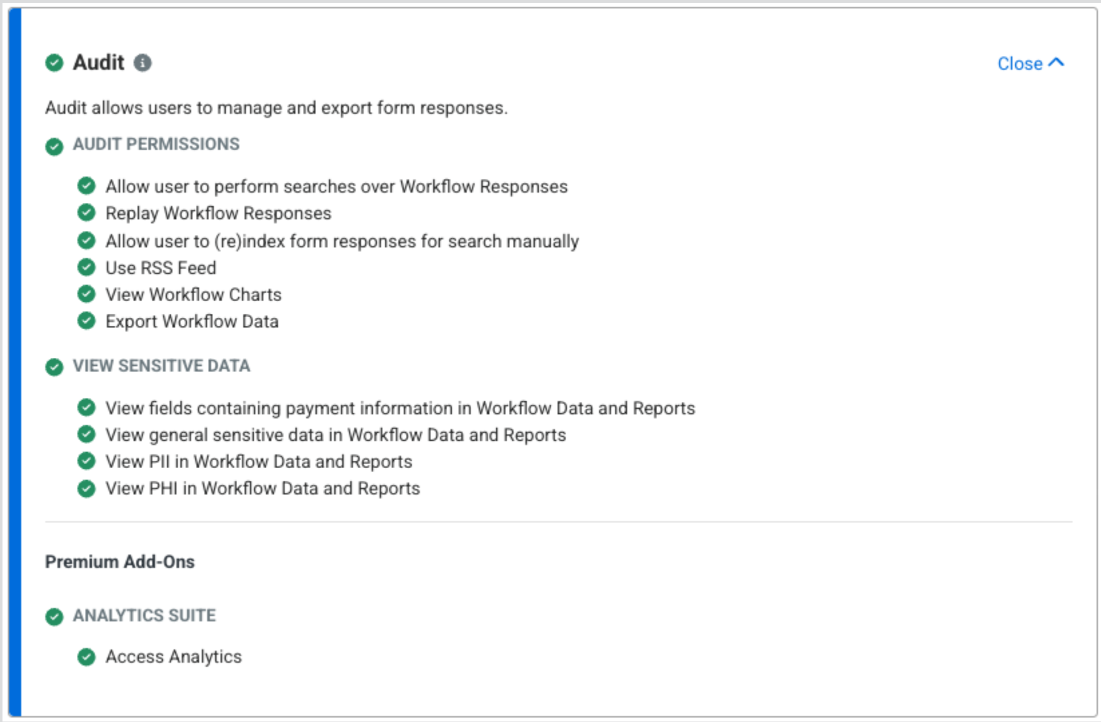
- Authorize.Net Payment
- Chargent Payment
- CyberSource Payment
- Freshbooks
- iATS Payment
- PayPal Payment
- Stripe

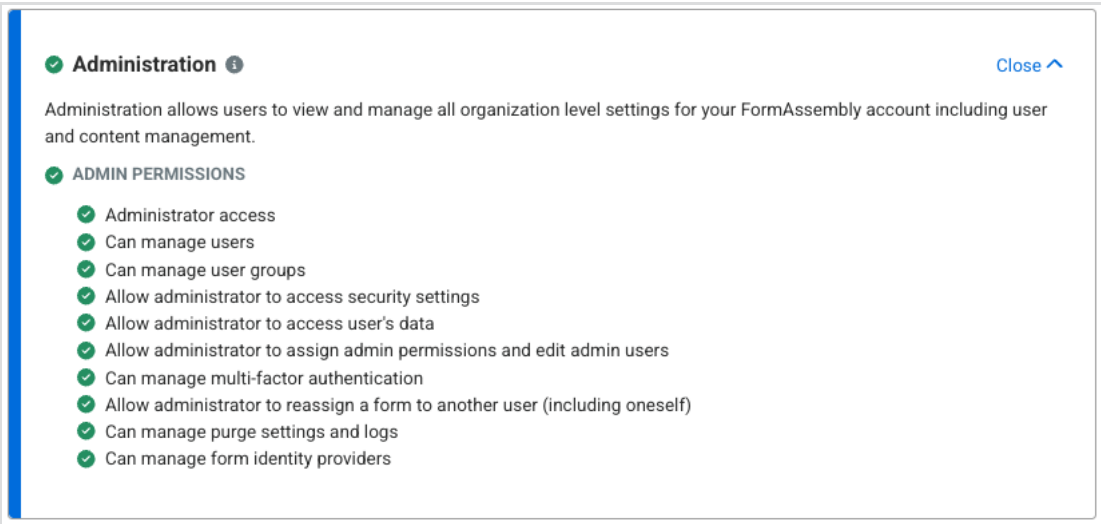
GOOGLE INTEGRATIONS

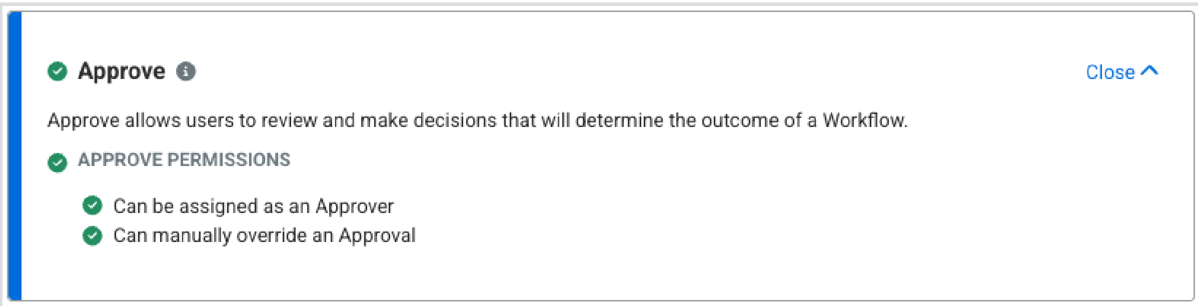
- Google Sheets
- Google Drive

FILE STORAGE INTEGRATIONS

- Dropbox
- Box







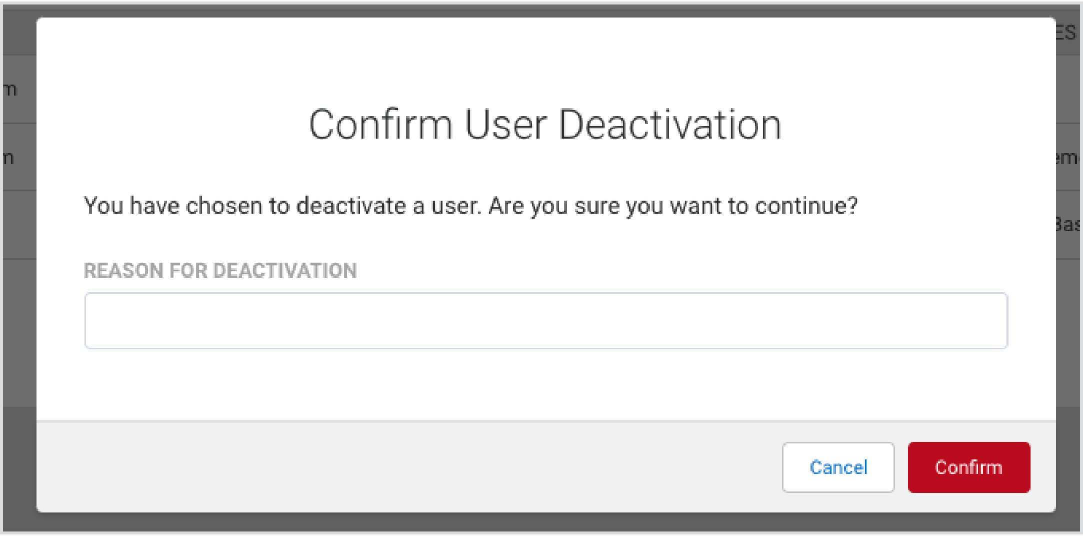
6. Selecting the checkbox on a Permission Package will also apply all related permissions to the user. You can then uncheck any permissions you would like to remove.

Deactivating a User

Note:

- Forms and responses belonging to a deactivated user are permanently deleted. To retain forms owned by a user you are planning to deactivate, reassign their forms to an active user before completing deactivation steps.
- If the user to be deactivated is a Collaborator on a workflow, remove the user from the workflow before deactivating the account; otherwise, issues may occur with the related workflow.
- A deactivated user may no longer log in and access their data.

1. On the left-side menu, select **User Management | All Users**
2. Locate the user within the **All Users** list or through the Search.
3. From the **View User** drop-down menu in the Actions column, select **Deactivate User**. This opens the **Confirm User Deactivation** modal.

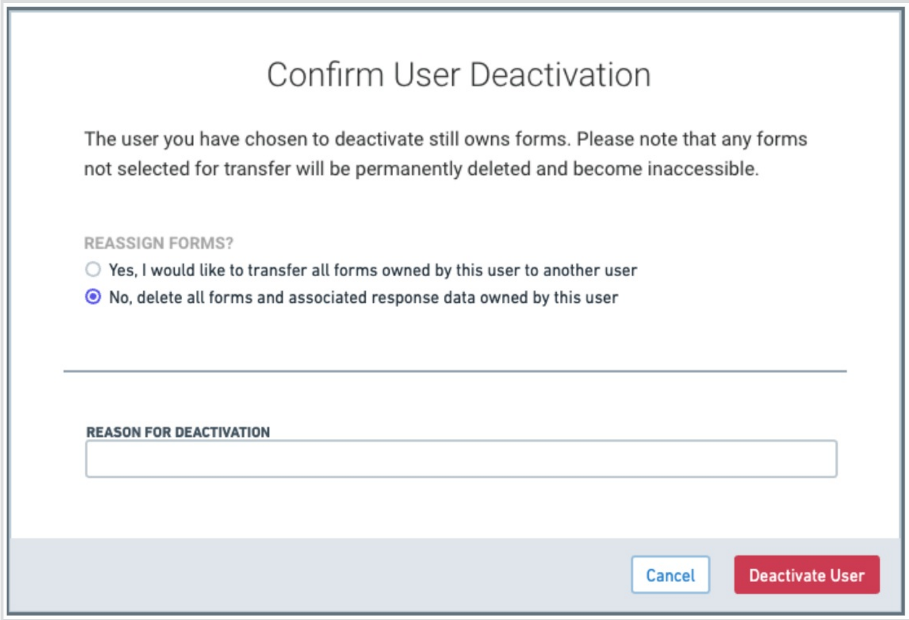


4. If the selected user does not own a form, enter a reason for the deactivation and click **Confirm**.

If the selected user is a form owner, select whether to transfer the user's forms to another user.

Note: Forms belonging to a deactivated user will no longer be available, and the application will no longer accept response submissions for those forms. You must move the forms to another active user before deactivating the owner.

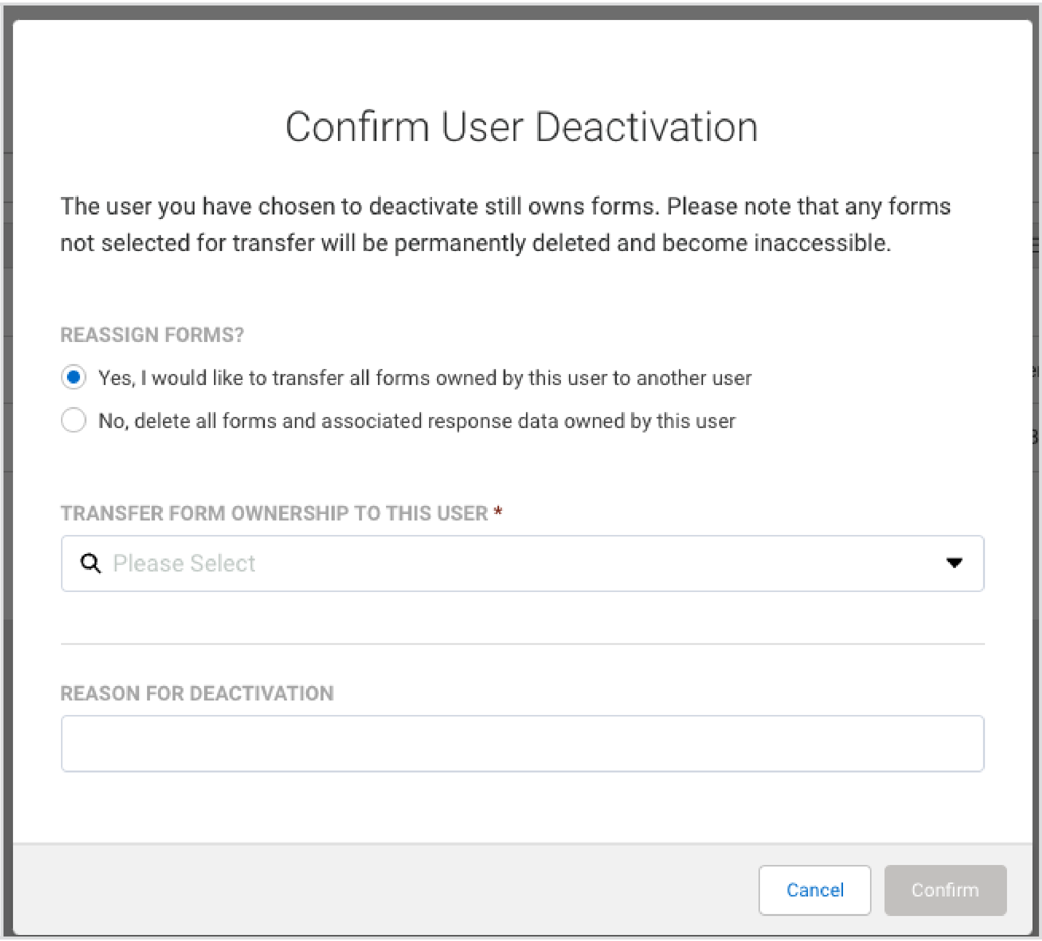
Option 1 - Don't Transfer Any Forms



- Select "**No, delete all forms and associated response data owned by this user**".
- Enter a reason for the deactivation and click Confirm to complete the user deactivation.

Option 2 - Bulk Transfer Forms to a New Owner

Note: This bulk transfer process transfers all forms from one user being deactivated to another user. You cannot pick and choose forms to transfer or divide ownership among several new owners using this method. If you would like to transfer ownership more granularly, please see the Form Administration article.



- Select "**Yes, I would like to transfer all forms owned by this user to another user** ".
- Select a new owner from the **TRANSFER FORM OWNERSHIP TO THIS USER** menu.
- Enter a reason for the deactivation and click **Confirm** to complete the form transfer and user deactivation.

Editing a User

1. On the left-side menu, select **User Management | All Users**
2. Locate the user within the **All Users** list or through the Search.
3. Click **Edit** and proceed to make any necessary changes.
4. Click **Apply** when finished.

Restoring a User

1. Locate the user on the **All Users** page.
2. Click on the Username or select the **Edit** button for the desired user.
3. In the **Details** tab, click the **Reactivate User** link.

Changing/Replacing an Account Admin

If you need to change the admin listed on your account, you can edit your existing admin's information to update it. All FormAssembly forms will then be under the new admin's account. Please make sure that your new admin has access to your FormAssembly account before leaving your organization or changing roles.

You will also need to contact your Customer Success Manager so that we can update your account information in our customer database.