Instance Login Method

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In this Article

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Administrators can enforce a standardized login method (such as SSO) for **all users** of the FormAssembly Instance or allow logins to be managed by user-level login preferences.

To adjust the login method for all users:

1. Locate the **Instance Login Method** section, on the Security page in the Admin Dashboard.

2. Select a login method from the following dropdown options:

   - **Manage via user's settings**: The login method set at the user account level will be used.

   - **FormAssembly**: The standard FormAssembly account login method uses your FormAssembly username and password.

   - **LDAP**: Uses your LDAP (or Active) Directory as the login method.
     - To configure LDAP for your instance, please open a case with FormAssembly Support and refer to our LDAP authentication article.

   - **SAML**: Uses your configured SAML identity provider as the login method.
     - To configure SAML for your instance, refer to our SAML authentication article.

3. Select whether to allow administrators to override the login method.

   - Allowing an administrator to override the login method would enable an admin to quickly recover the instance in the case of an identity provider outage.

4. Click **Save** at the top of the page to save your settings.

To adjust the login method for a specific user:

Note: The **User Login Method** will not be editable unless the **Instance Login Method** is set to "**Manage via user's settings**".

1. Navigate to **User Management | All Users** and select **Edit User**.

2. Select a login method from the **User Login Method** dropdown on the General tab. Choose from the following 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.
   - **LDAP**: Uses your LDAP (or Active) Directory as the login method.
     - To configure LDAP for your instance, please open a case with FormAssembly Support and refer to our LDAP authentication article.

3. Click **Save User** at the top of the page to finalize.

GENERAL   PERMISSIONS   DETAILS

Account

USERNAME *

lauren.johnson@formassembly.com

USER LOGIN METHOD

FormAssembly ▼

FormAssembly

SAML

LDAP