

USER ROLES AND PERMISSIONS

Form.com combines the efficiency of workflows with the organization of workgroups. Sophisticated administrative controls couple with a user-friendly interface to help you maintain the integrity and sensitivity of your data.

This document explains the various user types, roles, and permissions available within a Form.com account. User roles and permissions allow you to define, assign, and manage the level of access each end-user has within your account.

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User Types

Form.com provides administrative controls for user management and security. For the purposes of this document, “users” refers to individuals who use the application.

Back-end users

These are application users who have access to modules, such as the form suite, reporting, dashboards, and task management. They can build, edit, set up, launch, and monitor the data collection project and process. They also control permissions for their sub- and/or end-users.

The following account types can provision back-end users:

- Single Users
- Workgroups:
 - Multi-User
 - Multi-Access
- Super Admin (for the clients hosted outside of SaaS environment)

Front-end users and respondents

These end-users can access forms only when they are assigned or linked to them by users or administrators with higher-level permissions. They can be given permission to assign tasks, access dashboards, and view reports.

Form.com has multiple options that allow these users to collect data, conduct audits, and run inspections. You can publish form links on the web or intranet, via email, or publish forms to the web portal. You can also directly assign forms via the mobile app to a specific team or individual.

Depending on the distribution method we can define the following front-end users and respondents:

- Web respondents
- Web portal users
- Mobile app users (offline data collection)
- Third-party systems users (integration required)

Form.com Account Types

Form.com provides two types of accounts, which are mutually exclusive: Single User and Workgroups. Under the Workgroups account type, there are two additional, mutually exclusive subtypes: Multi-User and Multi-Access.

Single Users

This account type provides each end-user with a single login, which allows them to access the application modules available with your Form.com service.

Users can access the following modules under the Single User account type:

1. Form builder (any subscription)
2. Reporting (any subscription)
3. Data models (any subscription)
4. Contact manager (on-demand)
5. Portal (on-demand)
6. Task manager (on-demand)
7. Dashboards (on-demand)

From this account type, you can set up your forms/tasks and publish them to the portal, mobile users or share via link.

Workgroups

Workgroup accounts have an admin and several sub-users. All application modules available for the Single User account type are available for Workgroup accounts, but access rights are limited by their admins.

Users can access the following modules under the Workgroups account type:

1. Form builder (any subscription)
2. Reporting (any subscription)
3. Data models (any subscription)
4. Contact manager (on-demand)
5. Portal (on-demand)
6. Task manager (on-demand)
7. Dashboards (on-demand)
8. **Sub-user management (Workgroups only)**

From this account type, you can set up your forms or tasks and publish them to the portal, mobile users, or share with a link.

There are two account subtypes within Workgroups:

Multi-User

Sub-users own their separate accounts with an admin, who oversees all sub-accounts in a workgroup.

Sub-users cannot share their forms, contact managers, dashboards, or portals. All the data within their accounts are in a silo and can be accessed only by an account owner and the workgroup administrator.

Multi-Access

It is a single account accessed by sub-users. This allows different users to work with the same content, but with different rights to alter it.

More about Workgroup account types and their controls, you can learn from [this document](#).

Super Admin

Super admin (or an application admin) role is available only for private hosted customers. For SaaS model, this role is executed by Form.com Team.

Such admins have oversight and control over the application and its accounts, including:

- Adding, suspending, deleting accounts
- Changing user type
- Setting up feature sets for each individual account
- Managing credits
- Managing expiration dates
- Changing login names
- Resetting passwords

End Users and Distribution Methods

When your forms are ready, there are a variety of distribution methods available within the Form.com Platform.

Depending on the distribution method, we define the following end users of the platform:

Web respondents

The most basic distribution method will be a form link. You can:

- Publish it online
- Share link directly
- Send via email:
 - By using built-in email functionality
 - By using your email client or any other email tool

Form link can be open or password protected. Respondent list can be uploaded as a file or stored in the contact manager.

This method is limited to distribution forms only.

Web portal users

This type of users is stored in the contact manager and have their unique login and password.

Portal users have access to:

- Forms that were published for them directly
- Receive, execute and report on tasks
- Access dashboards and filter data

Mobile app users with offline support

Mobile app users are the portal users with the option to work with Form.com being offline. They will get access to the forms and tasks via the mobile app, available for:

- [iOS](#)
- [Android](#)
- [Windows](#)

This type of users can use web portal to access their forms and tasks with the same login credentials. Dashboards are currently available only via web portal.

Third-party systems users

Form.com is integrative platform, as you can get most from your data if you can share it within your existing IT infrastructure.

When there's a need to distribute data further, trigger follow up actions, share contact lists or any data bases, it can be done by means of API, data import and export capabilities. That's when the user of any other third-party system can benefit from Form.com Platform data.

Your employees can use the same in-house login credentials, as Form.com support Single Sign-On.

More about integration capabilities can be found in [this document](#).