

WORKGROUPS

This document explains the difference between Workgroup account types, what roles and controls they have. Workgroup accounts have an admin and several sub-users.

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. Everything within their accounts is in a silo and can be accessed only by an account owner or the workgroup administrator.

Multi-Access

This is a single account that can be accessed by sub-users. This allows multiple users to work with the same content using different rights to alter it.

Multi-User	Multi-Access
Sub-user management	
<ul style="list-style-type: none"> • Admin can add, suspend sub-users. • Admin has control over sub-accounts credits. • Admin can download a sub-account’s log files. 	<ul style="list-style-type: none"> • Admin can add and delete sub-users. • Account credits are shared between admin and sub-users. • Admin owns whole workgroup account. • Sub-users have access to only assigned folders.
Forms	
<ul style="list-style-type: none"> • Each sub-user has their own forms, which cannot be shared. • Admin can restrict launch option and require an approval. • Admin can grant access to the corporate themes • Sub-users cannot share form branding. 	<ul style="list-style-type: none"> • Access to the forms are granted by an admin. Forms can be shared between sub-users. • Admin has access to all forms. • Admin has complete control over the forms and can allow or deny creating, modifying, publishing and viewing the results. • Sub-users have access to mutual base of form themes. • Users can share form design within the workgroup.

Multi-User

Multi-Access

Tasks

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| <ul style="list-style-type: none"> Each sub-user has their own forms, which cannot be shared. | <ul style="list-style-type: none"> Admin can grant access to the workgroup tasks. |
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Contact manager

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| <ul style="list-style-type: none"> Contacts within the contact manager will be isolated for each particular sub-user. | <ul style="list-style-type: none"> All sub-users share access to the contact manager. Admin has controls over who can add, edit, and delete contacts within the contact manager. |
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Data models

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| <ul style="list-style-type: none"> Data models within the contact manager will be isolated for each particular sub-user. | <ul style="list-style-type: none"> All sub-users share access to the data models. Admin has controls over who can add, edit, and delete data within the data model. |
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Portal

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| <ul style="list-style-type: none"> Each sub-user has their own portal and can publish forms, to the contacts available only within their account . | <ul style="list-style-type: none"> Sub-users can publish forms to any portal available. Sub-users do not have the Portal tab. Only admin has access to the portal settings. |
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Dashboards

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| <ul style="list-style-type: none"> Each sub-user can build their own dashboards. Sub-users do not have access to other's dashboards settings, data or filters. | <ul style="list-style-type: none"> Admin controls rights and what data will be available. Admin has access to all dashboards built by the sub-users. Sub-users can view dashboards based only on the data they have access to. |
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