Multi-Access Account

The account accessed by multiple users with different logins/passwords and different access rights, allocated by the user with Admin Access rights.

The following functionality requires the purchase of a multi-access license.

Access Level Management

Click here for more details:

Access Levels Management allows you to configure access to account resources for users or user groups by granting permissions such as read, edit, delete, launch, publish.

If you have Multi-Access License you can manage your access levels from the Administration page (click Administration tab at the top of your account). Sub-users who have administration rights are allowed to set access rights for other sub-accounts within the workgroup. For more details see the Access Rights help chapter.

On this page you can find the Access Permission tree containing two first-level folders: Users and Groups.

Users This folder includes the list of available users. Clicking + next to the folder will expand the list of users. Users folder is hyperlinked. Click on it to open the users table.

Click here for more details:

<table>
<thead>
<tr>
<th>Name</th>
<th>Displays subuser's name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>Displays subuser's email address or login.</td>
</tr>
<tr>
<td>Last Visit</td>
<td>Date and time of the last login.</td>
</tr>
</tbody>
</table>

Groups Indicate if a sub user belongs to the group or has individual rights assigned. The group name is hyperlinked. Click on the group name to edit the group profile. Note that only master account can edit the group profile.

Active Indicates whether subuser status is active or not. Active subusers are in black. Inactive subusers are in gray. The status can be changed the Profile page within the master account.

Action is the option that is available for master account owner only. It includes the following options:

- Edit Allows you to apply changes to a subuser profile.
- Delete Removes a subuser from this account.
Groups This folder includes the list of available groups. Clicking + next to the folder will expand the list of users. Users folder is hyperlinked. Click on it to open the users table.

- Click here for more details:

![Groups](image)

**Name** Displays groups names that were created in this workgroup.

**Members** Displays all members within this group. Member name is hyperlinked. Click on it to edit user’s profile. Note that only master account can edit the user profile.

**Action** is the option that is available for master account only and includes the following options:

- **Edit** Allows you to apply changes to group profile.
- **Delete** Removes group from this account.

- The following functionality requires the purchase of a multi-access license.
- Any modifications in the set of plan features that comes with the subscription of the main account will be reflected in all subaccounts. The modifications of the subaccount plan features do not affect the main account.
- Subaccounts are not given the bank of survey credits. All credits are withdrawn from the main account.
- If several subusers edit the same object (survey, question, etc.), the system saves the changes submitted by the last Save click.

Access Permissions

- Click here for more details:
The following table describes each right that can be granted to Sub-user:

<table>
<thead>
<tr>
<th>Form/Survey folders</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Read</strong></td>
<td>A user is able to view forms/surveys, but no modifications are allowed.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>A user is able to view, edit existing forms/surveys and create new ones.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>A user is able to view, edit, create new forms/surveys and delete existing ones.</td>
</tr>
<tr>
<td><strong>Publish</strong></td>
<td>A user is able to launch forms/surveys.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>A user is able to use forms/surveys as templates and create new forms/surveys by copying existing ones.</td>
</tr>
<tr>
<td><strong>Response Data</strong></td>
<td>A user is able to view, manage reports, and export collected data. He may also create, modify and publish dashboards.</td>
</tr>
<tr>
<td><strong>Admin</strong></td>
<td>A user is able to grant access rights to forms/surveys to other subaccounts of the workgroup.</td>
</tr>
<tr>
<td>Reports Folders</td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Read</strong></td>
<td>A user is able to view reports in the Custom folders, but no modifications are allowed.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>A user is able to view, copy, edit, existing reports and create new ones in the Custom folders.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>A user is able to view, copy, edit, delete existing reports and create new ones in the Custom folders.</td>
</tr>
<tr>
<td><strong>Publish</strong></td>
<td>A user is able to export data in various formats from the Publish page of reports, located in the Custom folders.</td>
</tr>
<tr>
<td><strong>Admin</strong></td>
<td>A user is able to grant access rights to Custom report folders to other subaccounts of the workgroup.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account level rights</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Custom Categories</strong></td>
<td>A user has access to Administrator Themes Folder on the Layout page and can apply Custom themes to forms/surveys they have access to.</td>
</tr>
<tr>
<td></td>
<td>Sub-users don't have a right to edit Custom themes.</td>
</tr>
<tr>
<td><strong>Manage Folders</strong></td>
<td>A user is able to perform folder operations, such as creating, renaming, deleting sub-folders, moving forms/surveys and reports among folders they have access to.</td>
</tr>
<tr>
<td></td>
<td>Surveys and reports can be moved between folders with the same set of rights assigned for this user.</td>
</tr>
<tr>
<td><strong>Edit Question Analysis Code</strong></td>
<td>A user can edit Question Analysis Code in existing forms and surveys, as well as new question analysis codes or delete them.</td>
</tr>
<tr>
<td><strong>Edit Question Library</strong></td>
<td>A user has full access to Questions Library and is able to use, add, edit or delete questions and custom categories there.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact manager account level rights</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Portal Impersonate</strong></td>
<td>A user has access to Impersonate mode on the Portal tab.</td>
</tr>
<tr>
<td></td>
<td>This is available to accounts configured to use the Online Portal only.</td>
</tr>
<tr>
<td><strong>Edit Contacts</strong></td>
<td>A user can edit contacts in a Contact Manager created in the administrator’s account.</td>
</tr>
<tr>
<td><strong>Add and delete contacts</strong></td>
<td>A user has full access to Contact Managers and can add or delete contacts.</td>
</tr>
<tr>
<td><strong>Create, delete and modify the structure</strong></td>
<td>A user has full access to Contact Managers and can create new Contact Managers, as well as modify and delete existing ones.</td>
</tr>
<tr>
<td><strong>Export as XML</strong></td>
<td>A user can export Contact Manager data in XML format using a Remote Data Retrieval link.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data model account level rights</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>View objects</strong></td>
<td>A user has access to administrator's Data Models, but can only view and export objects from them.</td>
</tr>
<tr>
<td><strong>Edit objects</strong></td>
<td>A user has access to administrator's Data Models; he can view, edit and export objects from them.</td>
</tr>
</tbody>
</table>
Add and delete objects

A user has access to administrator's Data Models; he can add or delete objects.

Create, delete and modify the structure

A user has full access to Data Models and is able to create new Data Models, as well as modify and delete existing ones.

Export as XML

A user can export Data Model objects in XML format using a Remote Data Retrieval link.

Tasks

Subaccounts that have Manage Folders and Admin rights can create private folders that will be flagged with the icon. Such folders do not inherit access rights of the higher level folder they are created within. By default, private folders will be visible for workgroup administrator and subaccount that created these folders.

Click Save to apply all the changes done on this page. Click Cancel to undo all changes.

- The following functionality requires the purchase of a Multi-Access license.
- Select the Apply Rights to Subfolders option to automatically activate corresponding access rights to all nested folders. If this option is not selected, the access rights may be given separately to folders and their subfolders one by one.

Add New Access Group

Click here for more details:

To create a new group you need to follow these steps:

1. At the top of your account click Administration tab
2. Click the Groups folder on the left pane.
3. Click the New Group button.
4. Fill out the form on the New Group page.

1. **Group Name** Give a name to your New Group. This field is mandatory to fill out.
2. **Description** Provide your group with the description.
3. Select subusers in the Available Users list.
4. Move subusers to Selected Users list.

5. Click the Save button to submit new group information and add it to your workgroup.
Click **Cancel** to undo all actions up to the last saved one.

Once the new group has been saved, click **Rights** tab to assign access permissions.

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The following functionality requires the purchase of a multi-access license.

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**Add New User**

- **Click here for more details:**
- To add a subuser to your multi-access account you need to login to the administration account of your workgroup and follow these steps:

  1. At the top of your account click **Administration** tab.
  2. Click the **New User** button from the **Users** table menu.
  3. Provide personal information on the **New User** page.

- **Click here for more details:**

![Profile](image)

- Click **Cancel** to empty all the form fields.
- All fields marked with * are mandatory to fill out.
- When added, system will send an automated email to the address indicated in the **Email** field.

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**The letter will have the following content**

Your administrator has granted you an access to her account. Listed below is the information in your profile.

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4. Click **Save** to submit new subuser information and add new user to your workgroup.

After you have added a new subuser, you can edit his profile, using the master account. For more info, visit **Edit User Profile** page.

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- The following functionality requires the purchase of a multi-access license.
- The number of subusers who can be added to your workgroup cannot exceed your user license limit.

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**Edit Group Profile**

- **Click here for more details:**
- Group profile can be edited by the master account holder only. To edit group profile you need to go to the **Group** folder and then click the appropriate group name on the **Administration** > **Access Levels** > **Manage Groups** page.

You can change information in the following fields:
- **Group Name** Allows to edit your group name.
- **Description** Allows to edit your group description.
- Select appropriate user and move it to your group from Available Users list.

Be sure to **Save** your changes to the modified group profile.

Click **Cancel** to undo all actions up to the last saved one.

Click the **Rights** tab to assign access permissions to this group.

Requires a multi-access license purchase

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**Edit User Profile**

Click here for more details:

Workgroup's user profile can be edited by the master account only. To edit user profile click the Edit button next to subuser on the Administration > Access Levels > Manage Users page.

If you need you can change information in the following fields:

- **First Name**
- **Last Name**
- **Email**
- **Company**
- **Phone**
- **Login**

**Active** Select this option to grant your account access to subuser. This option is selected by default.

**New Password** Select this option to generate new password for subuser. Once clicked **Save** the new automatically generated password will be emailed to subuser.

**Notify user immediately** If any changes were applied to subuser profile, select this option and click **Save** to send an email notification about profile changes to the email address indicated in **Email** field.

Select **Individual rights** option to provide subuser with individual rights.

Select **Groups** option to grant a subuser rights assigned to a certain sub-users group. Once clicked, you can select a group the subuser will belong to.

Click **Save** to apply changes to subuser profile.

Click **Cancel** to undo all actions up to the last saved one.

- The following functionality requires the purchase of a multi-access license.
- All fields marked with * are mandatory to fill out.