

Manage Teams and User Role Permissions

Teams are an organizational tool to help you manage your users and surveys. Once you assign a survey to a team, it's only visible to users on that team. This can help you with keeping your surveys separated by department, client or any other division you need. You can have as many teams as you need to help you organize your users.

A **Role** in Alchemer is a selection of permissions that determine which aspects of a survey individual users have access to (e.g. editing a survey, deleting responses, etc).

Think of roles as the user's job within Alchemer. Let's say you have a user who needs to run reports and exports on the survey data after it has been collected. Their "role" in Alchemer would be a Reporter which gives them access to the reporting and exporting tabs, without giving them unneeded tabs which don't fall within the realm of their job. There are five standard roles available, but you can also create custom roles.

The user and survey management hierarchy in Alchemer works like this:

- Each user is assigned a specific license which controls access to specific features.
- Each of your surveys is owned by a team.
- Users are assigned to a team which allows access to surveys that are assigned to the same team.
- Each user has a role. A role is a selection of survey permissions that allow you to customize exactly what your individual users are able to do (e.g. editing a survey, deleting responses, etc). Roles may further restrict a user's access to features otherwise available via their license.

You can also think of this hierarchy in this way:

A **license** determines the features that are accessed by a user > A **team** controls what surveys the user can access > A **role** determines what the user can do with those surveys.

It is important to note that there are scenarios in which **Roles** will trump **Licenses** but also scenarios in which **Licenses** will trump **Roles**.

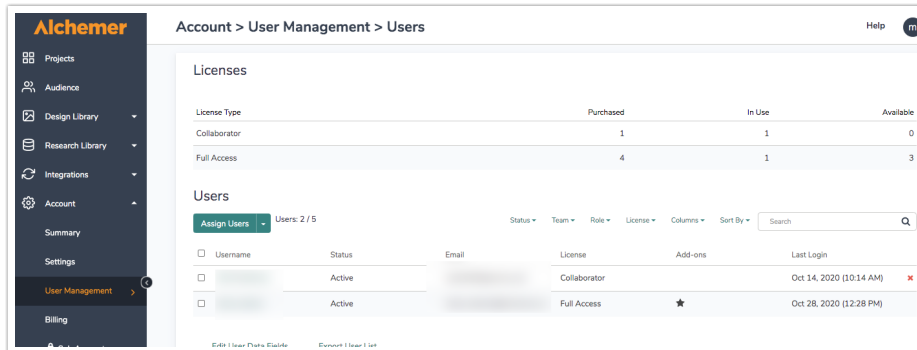
If a user has been assigned a **Full Access License** and given a **Tester Role** on a team, their full access would be restricted for any surveys on that same team.

Similarly, if a user has been assigned a **Report User License** and given an **Editor Role** on a team, their report license would restrict them from making edits to any surveys.

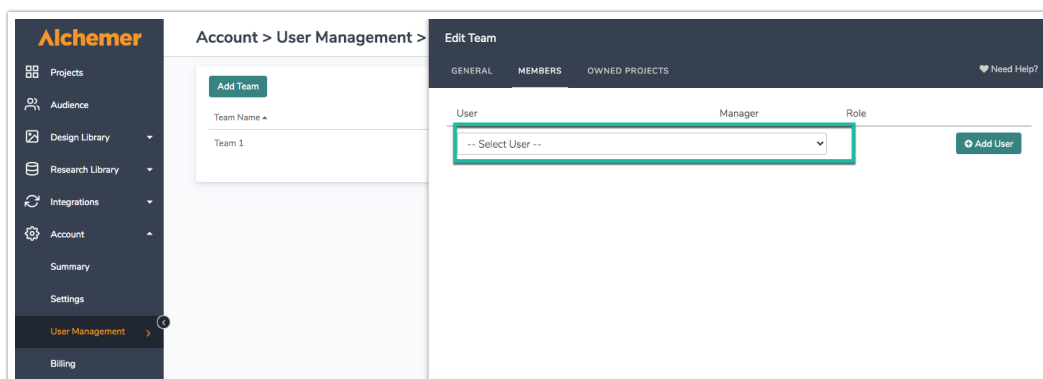
The take away is that the more restrictive of the two (License & Role) will take precedent.

Add Teams

1. Go to **Account > User Management > Teams**. To add a new team, click **Add Team** at the top of the page.



2. On the **General** tab enter a **Name** and **Description** for your team.
3. On the **Members** tab, you can add existing users to the team by selecting a user in the **Select User** dropdown and clicking **Add User**.



4. On the **Owned Projects** tab, you can search for existing surveys and click **Add Project** to assign that survey to your new team.

Reassign a Survey to Another Team

From within the survey, you can change the **Team Ownership** under **Tools > Survey Settings**.

You can also reassign the survey to a new team within **User Management** under **Teams > Owned Projects**. Scroll to the bottom of the list and search for the survey you wish to add then click **Add Project** and **Save Team**.

Edit Team

GENERAL MEMBERS OWNED PROJECTS ♥ Need Help?

Projects Owned by

➕ Add Project

Change a User's Team

You can change a user's team from the **Users** tab or the **Teams** tab.

1. From the **Users** tab, click to edit the user and go to the **Teams/Projects** tab.
2. You can then select the team you wish to add them to in the **Select Team** dropdown.

PROFILE TEAMS/PROJECTS ♥ Need Help?

| Team | Manager | Role | Survey Default |
|--------|---------|--------|----------------|
| Team 1 | ✓ | Editor | ★ ✕ |

-- Select Team --

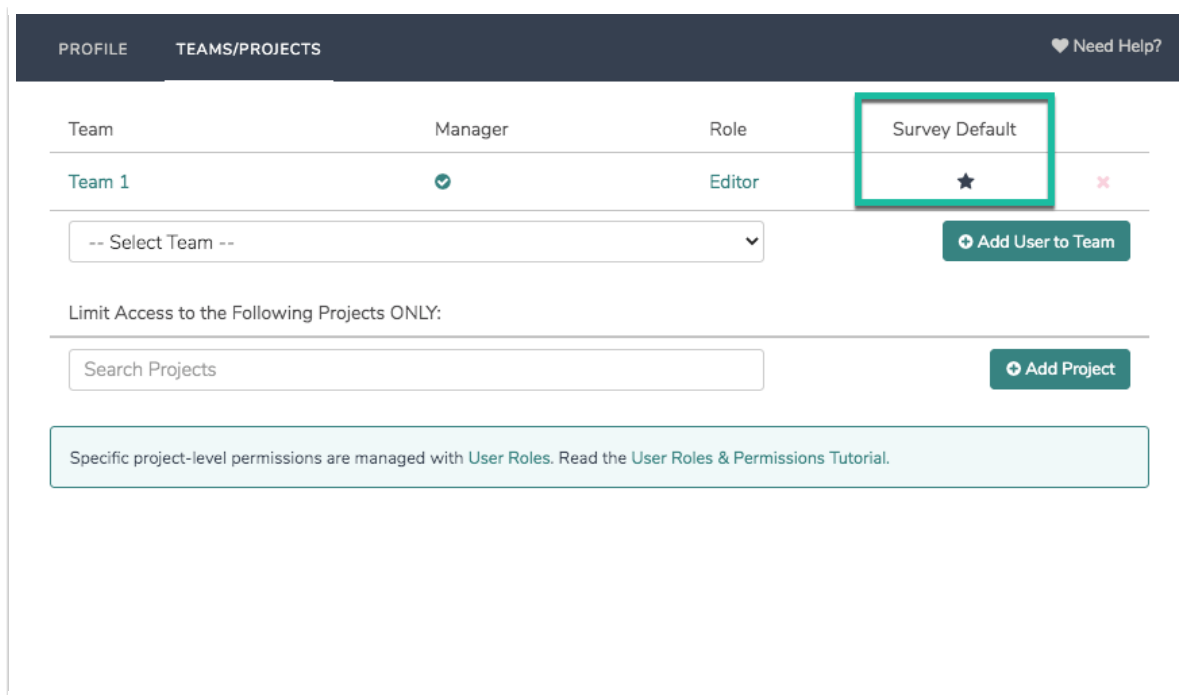
➕ Add User to Team

Limit Access to the Following Projects ONLY:

➕ Add Project

Specific project-level permissions are managed with User Roles. Read the User Roles & Permissions Tutorial.

3. Be sure to click the **Add User to Team** button to complete the process. You can also delete the user from a team by clicking the red **x** to delete the team.
4. If you added the user to more than one team you'll want to specify the survey default team. By default, when a user creates a survey it will be assigned to the team that appears first in their list of teams when alphabetized. If you wish to override this default click the star icon in the **Survey Default** column.



PROFILE TEAMS/PROJECTS ♥ Need Help?

| Team | Manager | Role | |
|--------|---------|--------|--------------------|
| Team 1 | ✓ | Editor | Survey Default ★ ✕ |

-- Select Team --

[+ Add User to Team](#)

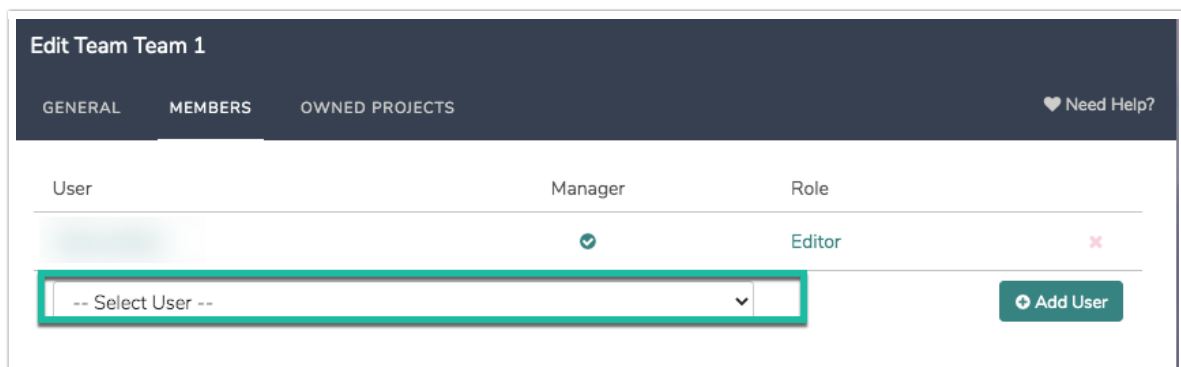
Limit Access to the Following Projects ONLY:

Search Projects [+ Add Project](#)

Specific project-level permissions are managed with [User Roles](#). Read the [User Roles & Permissions Tutorial](#).

From the **Teams** page, you can manage the team members.

1. Go to **Teams > Members** and scroll to the bottom of the list of team members and select the user you would like to add and click **Add User**. You can use the red x to delete a member from a team.



Edit Team Team 1 ♥ Need Help?

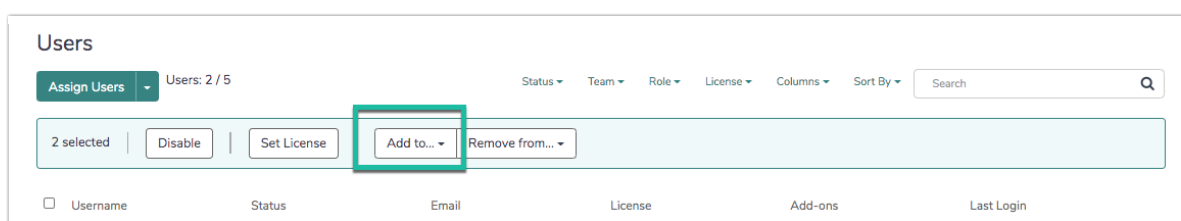
GENERAL MEMBERS OWNED PROJECTS

| User | Manager | Role | |
|------|---------|--------|---|
| | ✓ | Editor | ✕ |

-- Select User --

[+ Add User](#)

2. You can also add and remove users from teams in bulk. To do so, click the checkbox to the left of all users you wish to add to a team or remove from a team.
3. In the blue banner that appears click either the **Add to...** dropdown or the **Remove from...** dropdown to select the team.



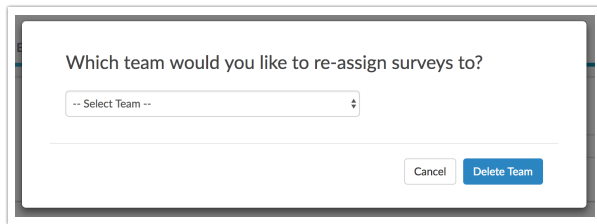
Users Assign Users Users: 2 / 5 Status Team Role License Columns Sort By Search Q

2 selected | [Disable](#) | [Set License](#) | [Add to...](#) | [Remove from...](#)

| Username | Status | Email | License | Add-ons | Last Login |
|----------|--------|-------|---------|---------|------------|
|----------|--------|-------|---------|---------|------------|

Delete Teams

You can have as many teams as you need but if you need to delete a team simply click the red x on the **Teams** tab. Select a team to reassign the surveys to and click **Delete Team**.

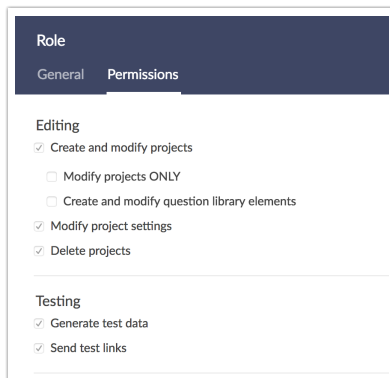


A modal dialog box with a dark header bar. The text inside asks "Which team would you like to re-assign surveys to?". Below this is a dropdown menu with the placeholder text "-- Select Team --". At the bottom right of the dialog are two buttons: "Cancel" and "Delete Team".

Standard Roles

You can access **User Roles** via **Account > User Management > Roles**.

The standard roles are **Editor, Publisher, Reporter, Tester**. To learn more about the specific permissions for each of these roles you can click the role and then the **Permissions** tab.



A screenshot of the "Role" configuration page, specifically the "Permissions" tab. The page has a dark header with "Role" and two sub-tabs: "General" and "Permissions". Under the "Permissions" tab, there are two sections: "Editing" and "Testing". The "Editing" section has four items: "Create and modify projects" (checked), "Modify projects ONLY" (unchecked), "Create and modify question library elements" (unchecked), "Modify project settings" (checked), and "Delete projects" (checked). The "Testing" section has two items: "Generate test data" (checked) and "Send test links" (checked).

Editor - Full control over a survey, from start to finish. All permissions are enabled.

Publisher - Can test, style and launch a survey, review results and generate reports. Publishers cannot create, edit or delete a survey or the responses collected.

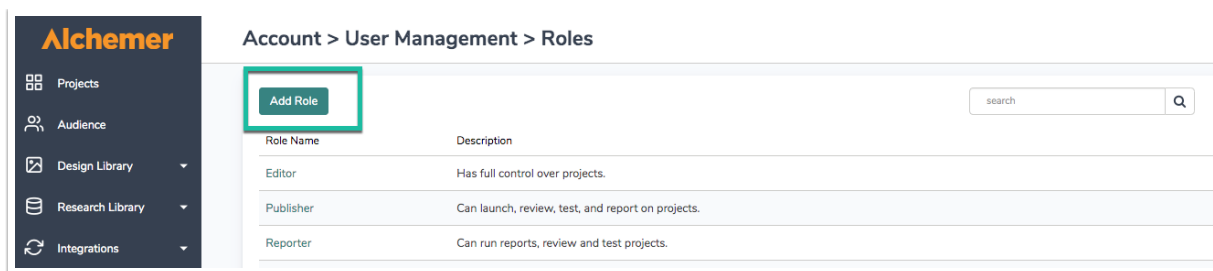
Reporter - Can report on the results collected, as well as modify or delete responses. Reporters cannot create, edit, delete or distribute a survey or customize the look & feel.

Tester - Can only generate test data or send test links.

Custom Roles

Custom roles can be created by Account Administrators. They allow you to assign more specific permissions to your users.

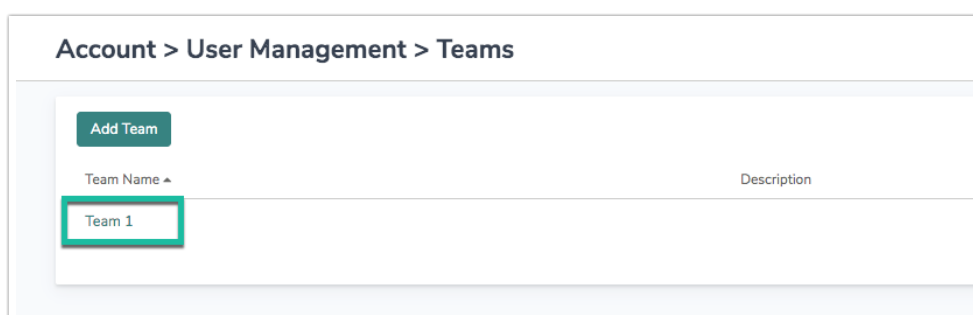
To create a new custom role you click the **Add Role** button or click the copy icon on any existing role to start.



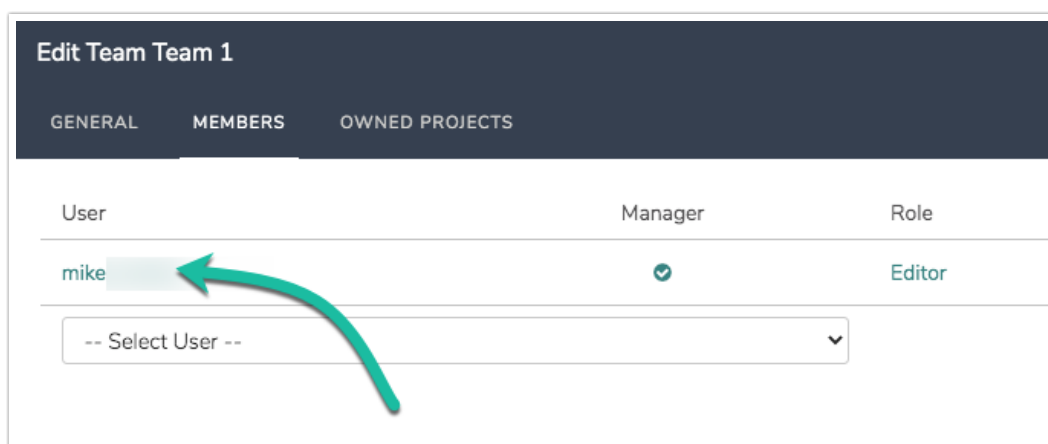
Change a User's Role

You can change a user's role from the Users page or the Teams page. From the **Teams** page:

1. Click to edit the team for which you would like to change the user's role.



2. Go to the **Members** tab.



3. Click on the user, select a new role, click **Done**, and **Save Team**.

Alternatively, from the **Users** page find the specific user whose role you wish to change.

1. Click to edit the user.
2. Go to the **Teams/Projects** tab and click on the team for which you would like to change the user's role.



3. Select a new role, click **Done**, and **Save Team**.

Editing Role for Product Team 01 on Team 1

Team Manager

☐ Make Product Team 01 a Team Manager on Team 1

Role

☒ **Editor** — Has full control over projects.

☐ **Publisher** — Can launch, review, test, and report on projects.

☐ **Reporter** — Can run reports, review and test projects.

☐ **Tester** — Can view and test projects.

Delete Roles

You cannot delete standard roles but if you have custom roles that you no longer need you can delete them simply by clicking the red x on the **Roles** tab.

Stand Alone Users

Stand Alone Users are available as an **add-on** for Account Managed accounts. Contact your Account Manager for details.

If you wish to set up a user such that, regardless of team or role, they will only be able to see the surveys that they create, check the option to make them a **Standalone User** found on the user **Profile** tab. Standalone users will have full access (meaning they will be Editors) to their own surveys (provided that their user license supports survey editing).

Permissions

☐ Account Admin

Note: You have reached your administrator limit. To purchase additional admin seats, contact our [Sales Team](#).

☐ Restrict API Access - User cannot access the API

API Key: This user does not have an API key. A new key can be created under [API settings](#).

☒ Stand-Alone User - User can only see surveys that they have created. [Learn More](#).

Stand Alone users will not have access to Folders on the Alchemer Dashboard.

Team Managers

When editing a Role, you can make that user a Team Manager. The Team Manager has the following additional permissions:

- Edit the Team name and description
- Add Users to the Team
- Edit Users on the Team (Make them Team Managers, change their roles)
- Delete Users from the Team
- Add surveys to the list of Owned Projects
- Search through their teams

Controlling User Access to Workflow

Administrators can now restrict access to the **Workflow** product using a new role-based permission.

A '**Access Workflow**' permission has been added under the **Miscellaneous** section of Role Permissions. When creating new custom roles, this permission will appear (disabled by default), so you can decide whether to grant access

Alchemer

Account > User Management

Role

GENERAL PERMISSIONS

Need Help?

PRODUCTS

- Survey
- Workflow
- Digital

TOOLS

- Audience
- Design Library
- Research Library
- Integrations

ACCOUNT

- Account
- Summary

Add Role

| Role Name | Description |
|-----------|-------------|
| Editor | Has full co |
| Publisher | Can launch |
| Reporter | Can run res |
| Tester | Can view a |
| No Access | Has no acc |
| Solo | A role that |

Individual Responses

- ☒ Publish exports
- ☒ Delete exports
- ☒ View response stats
- ☒ View responses and Alchemer Workflow runs
- ☒ Modify responses
- ☒ Move responses to trash
- ☐ Permanently delete responses

Miscellaneous

- ☒ Access Workflow
- ☒ Switch themes
- ☒ Customize themes
- ☒ Answer admin questions
- ☒ Access the File Library
- ☒ Create and modify folders
- ☐ Apply data retention policies to projects

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