Manage Teams and User Role Permissions

Teams

Teams are an organizational tool to help you manage your users, surveys, and **data access across both Survey and Dashboard.** Once you assign a survey to a team, it is only visible to users on that team. This helps you organize content by department, client, location, or any other structure you need. You can create as many teams as needed.

How access works in Alchemer

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

- Each user is assigned a **license**, which controls access to features
- Each survey is owned by a **team**
- Users are assigned to a **team**, which determines which surveys and data they can access
- Each user has a **role**, which determines what actions they can take within those surveys

You can also think of this hierarchy as:

License → Team → Role

- A **license** determines what features a user can access
- A **team** controls what surveys and data the user can see
- A **role** determines what the user can do with those surveys

> Note: The more restrictive setting between license and role always takes precedence.

Teams and dashboard data access

In addition to controlling Survey access, Teams also control **default data visibility in Alchemer Dashboard.**

- Users (including Stakeholders) can see data from surveys assigned to their Team
- This data appears in dashboards by default
- If a dashboard includes data from multiple Teams, users will only see the data they have permission to access

Sharing across teams

Dashboard Creators can share dashboards or data with users outside their Team.

When this happens:

- Users gain access to the shared dashboard
- Users may also gain access to underlying data (if granted during sharing)

This allows you to maintain Team-based data governance while enabling broader visibility across your organization.

Teams and stakeholder users

Teams are especially important when working with **Stakeholder licenses.**

Stakeholder users:

- Have **view-only access to Survey reports**
- Have **interactive access to dashboards** (if enabled)
- Cannot create or edit surveys or dashboards

For Stakeholders:

- Team assignment determines which surveys and data they can access
- They can view:
  - Survey reports for their Team
  - Dashboards containing their Team's data
- Additional dashboards or data can be shared with them across Teams

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Roles

A Role in Alchemer is a selection of permissions that determines what actions a user can take within a survey (e.g., editing a survey, deleting responses).

Think of roles as the user's job within Alchemer. For example, a user who only needs to run reports would be assigned a **Reporter** role, which grants access to reporting without exposing unnecessary features.

There are four standard roles, and you can also create custom roles.

Standard roles

- **Editor** – Full control over a survey
- **Publisher** – Can test, style, launch, and report, but cannot build surveys
- **Reporter** – Can view reports and manage responses
- **Tester** – Can generate test data and send test links

Roles vs. licenses

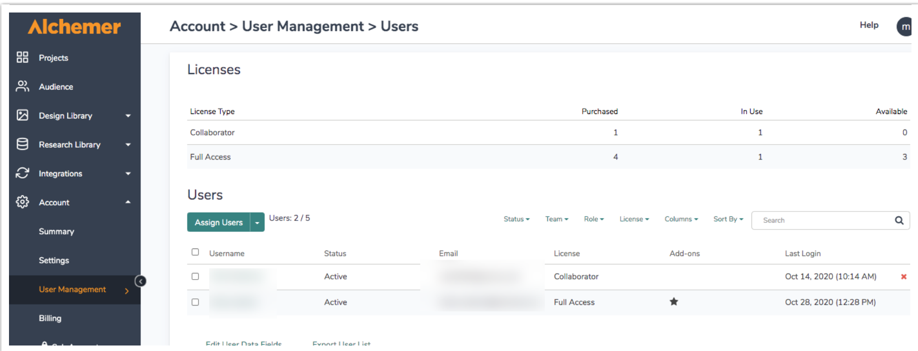
There are scenarios where roles override licenses and vice versa.

- If a user has a **Full Access license** but a restricted role (e.g., Tester), their access will be limited by the role
- If a user has a **Report license** but a more permissive role (e.g., Editor), their access will still be limited by the license

The most restrictive setting always applies.

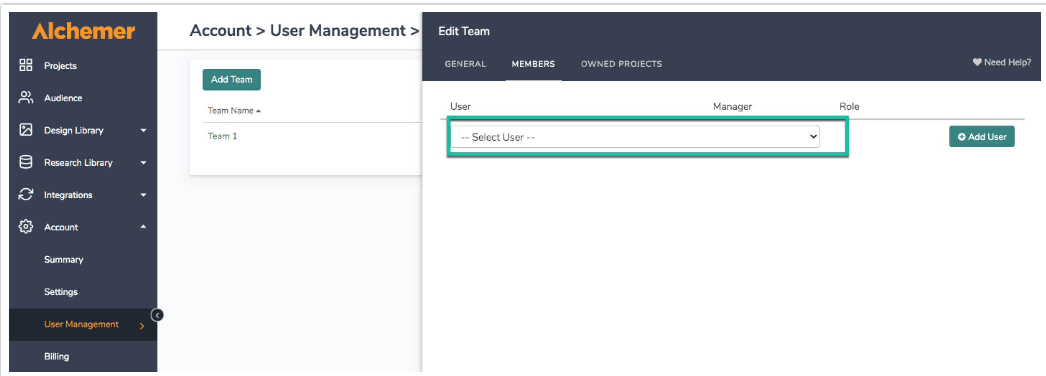
Add Teams

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

You can reassign a survey in two ways:

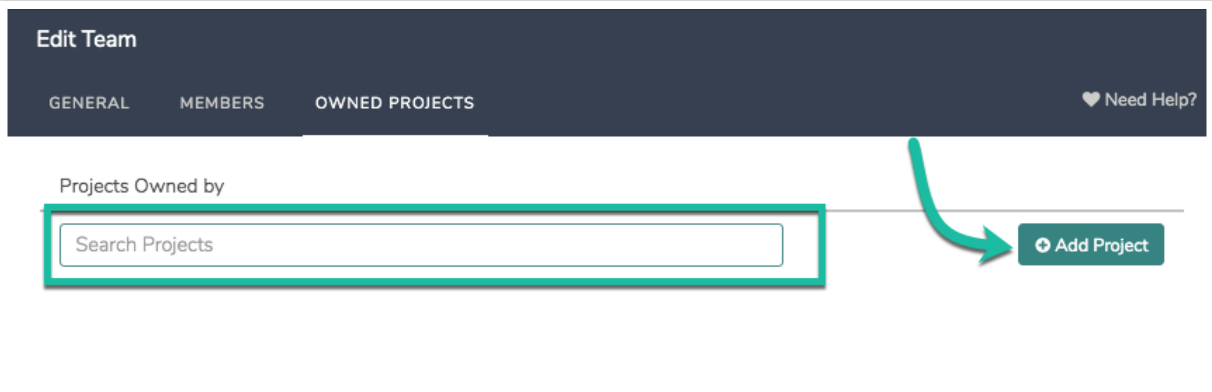
From within the survey:

- Go to **Tools** > **Survey Settings** and update Team ownership

From User Management:

- Go to **Teams** > **Owned Projects**

- Search for the survey and click **Add Project**
- Save the team

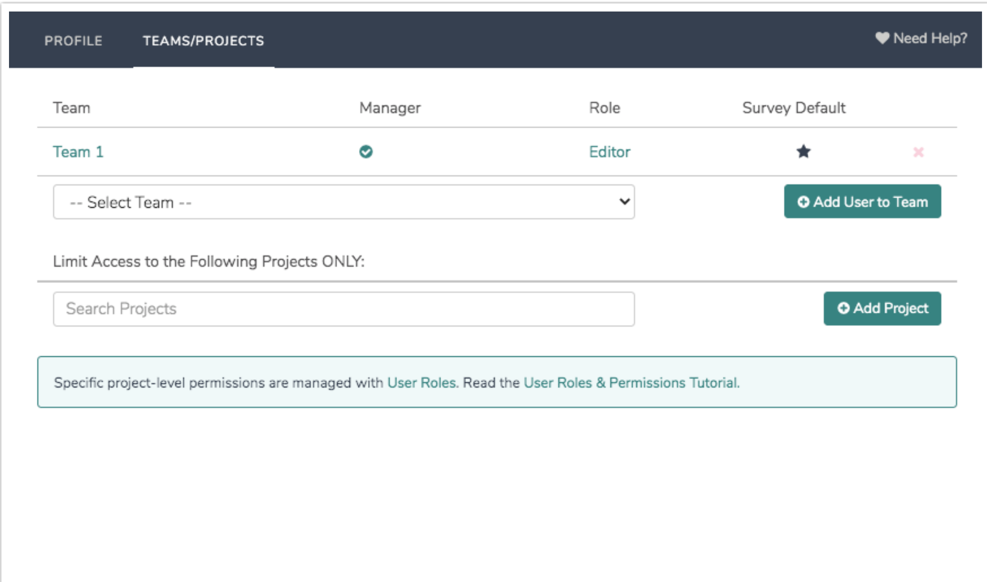


Change a User's Team

You can update team assignments from either the **Users** tab or the **Teams** tab.

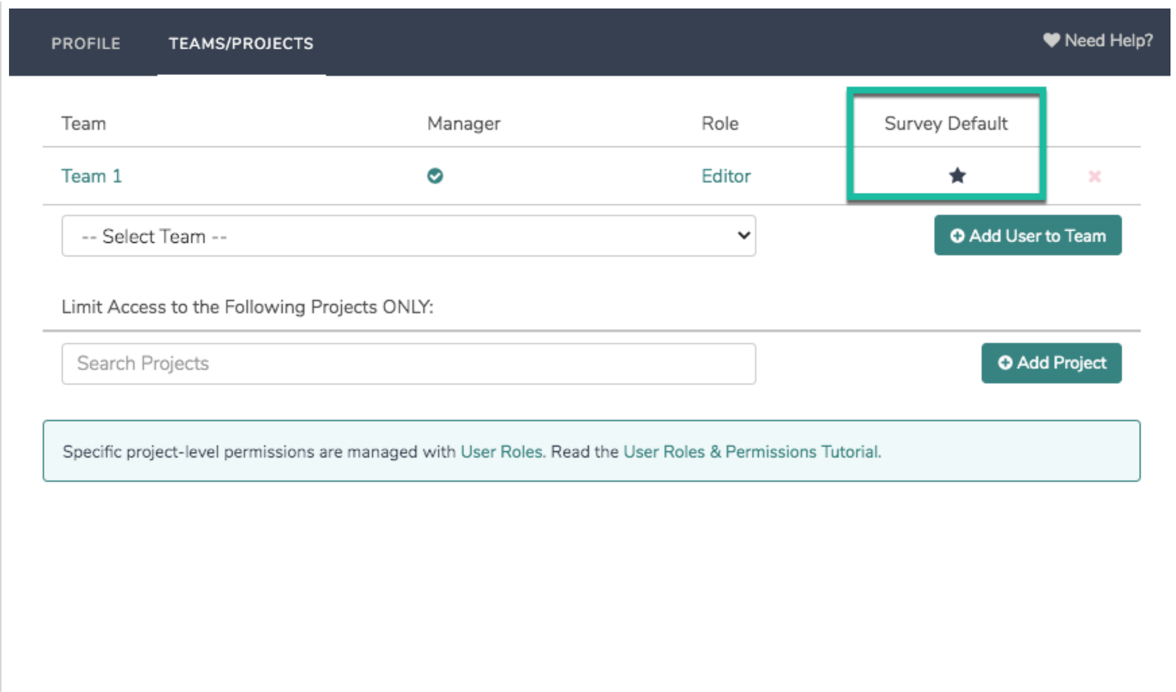
1. From the **Users** tab, click to edit the user and go to the **Teams/Projects** tab.

2. You can then select the team you wish to add them to in the **Select Team** dropdown.



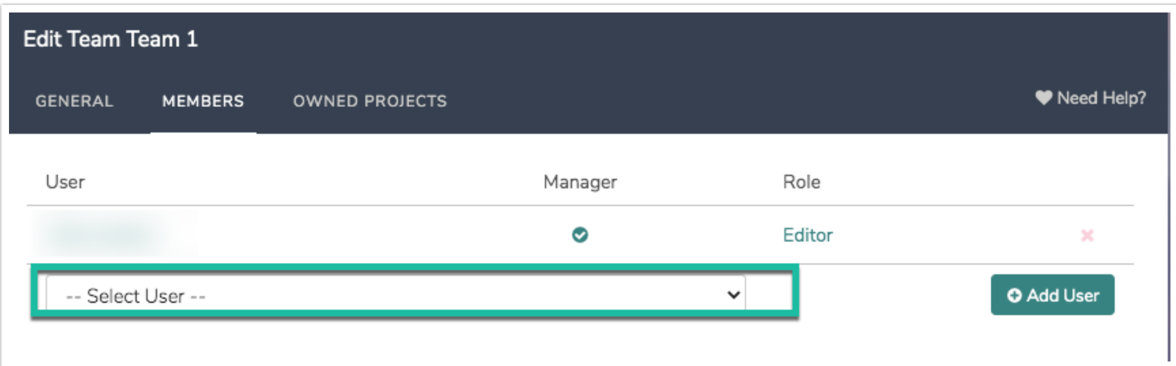
3. Be sure to click the **Add User to Team** button to complete the process. You can also delete the user from a team by clicking the red **x** to delete the team.

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.



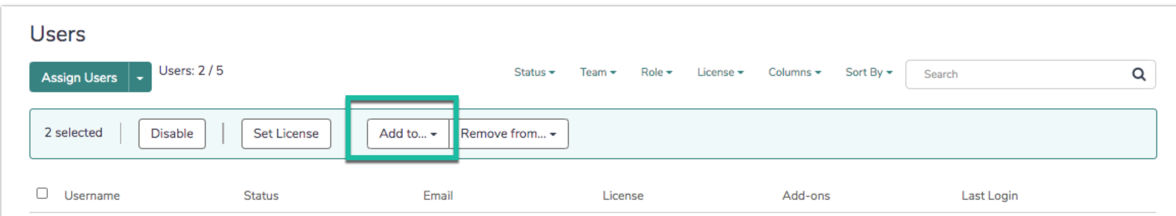
From the **Teams** page, you can manage the team members.

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.



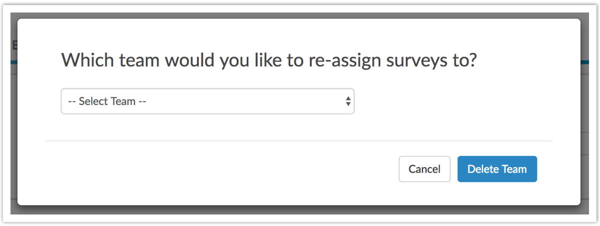
2. You can also add and remove users from teams in bulk. To do so, click the checkbox to the left of all users you wish to add to a team or remove from a team.

3. In the blue banner that appears click either the **Add to...** dropdown or the **Remove from...** dropdown to select the team.



Delete Teams

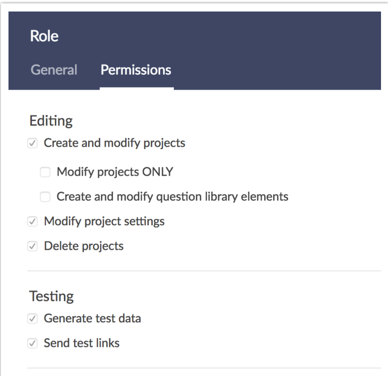
You can have as many teams as you need but if you need to delete a team simply click the red x on the **Teams** tab. Select a team to reassign the surveys to and click **Delete Team**.



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.



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.

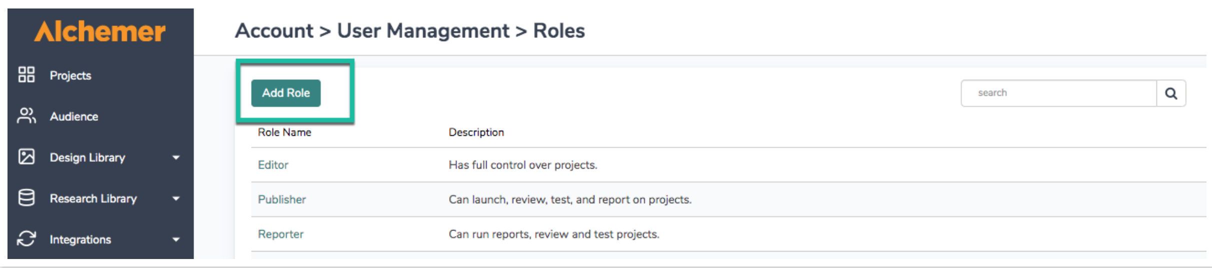
Reporter - Can report on the results collected, as well as modify or delete responses. Reporters cannot create, edit, delete or distribute a survey or customize the look & feel.

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.

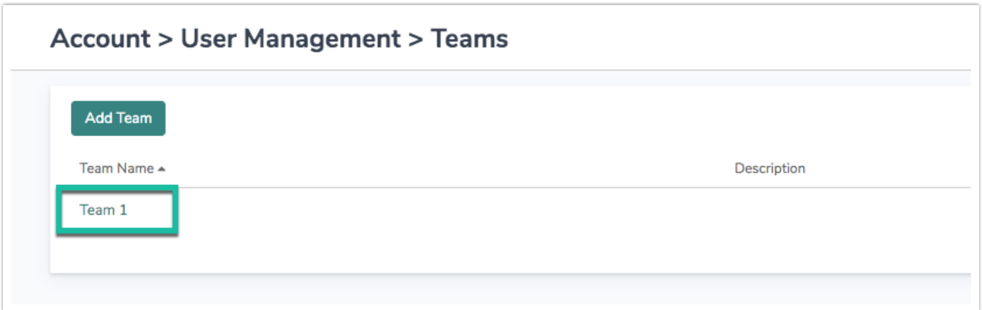
To create a new custom role you click the **Add Role** button or click the copy icon on any existing role to start.



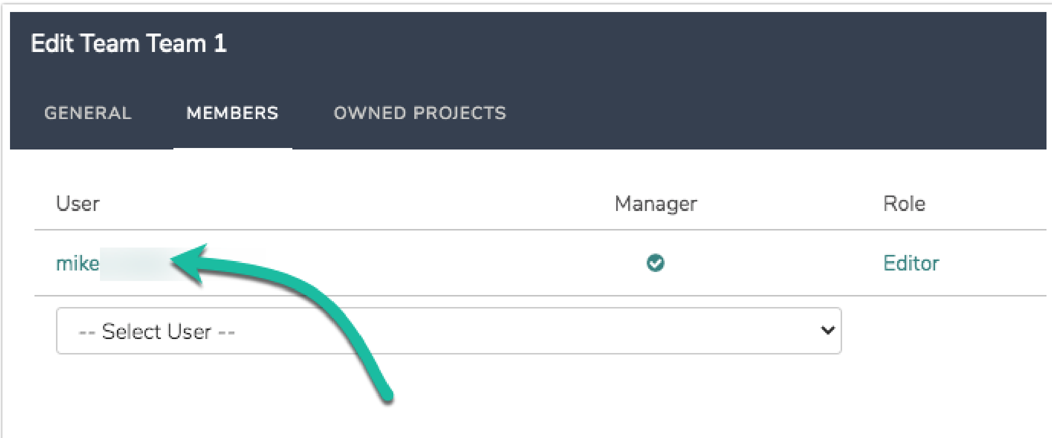
Change a User's Role

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.

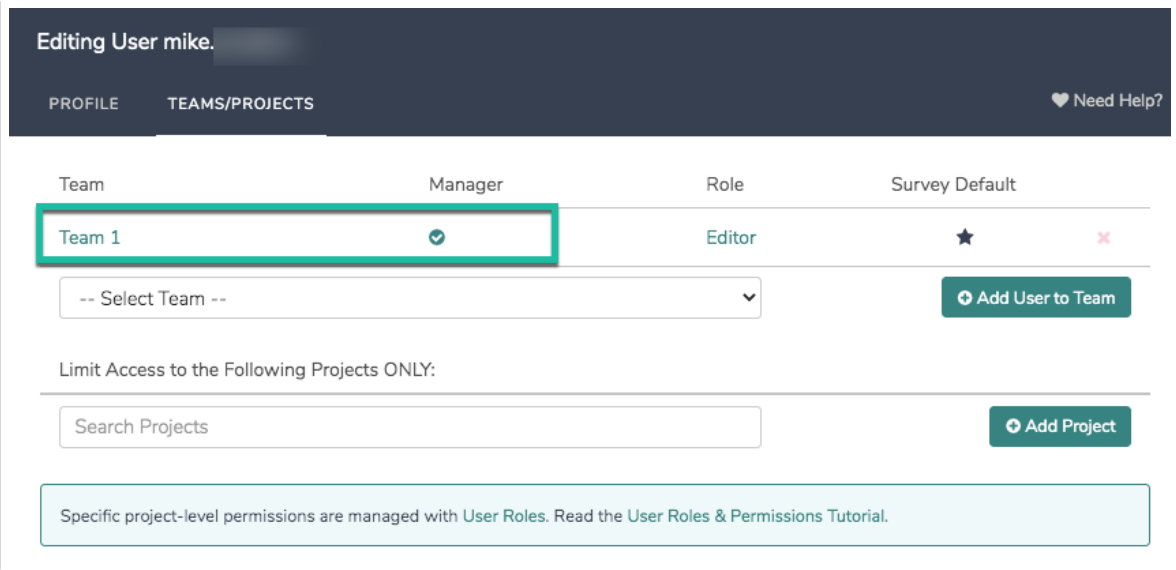


3. Click on the user, select a new role, click **Done**, and **Save Team.**

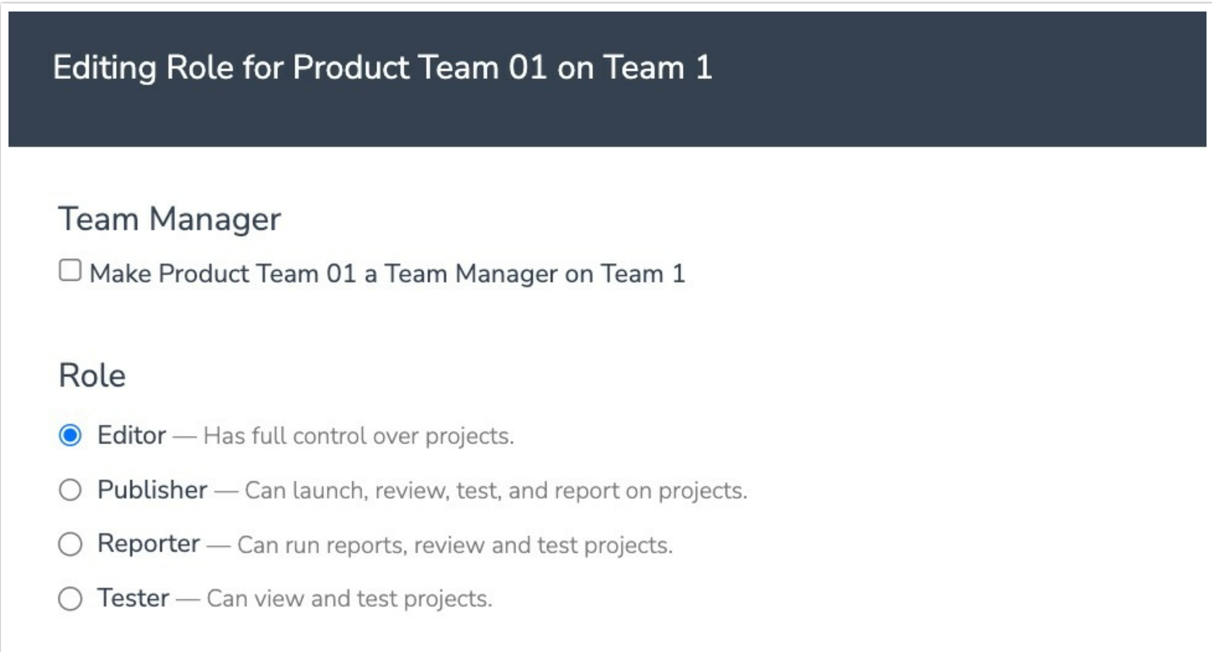
Alternatively, from the **Users** page find the specific user whose role you wish to change.

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**.



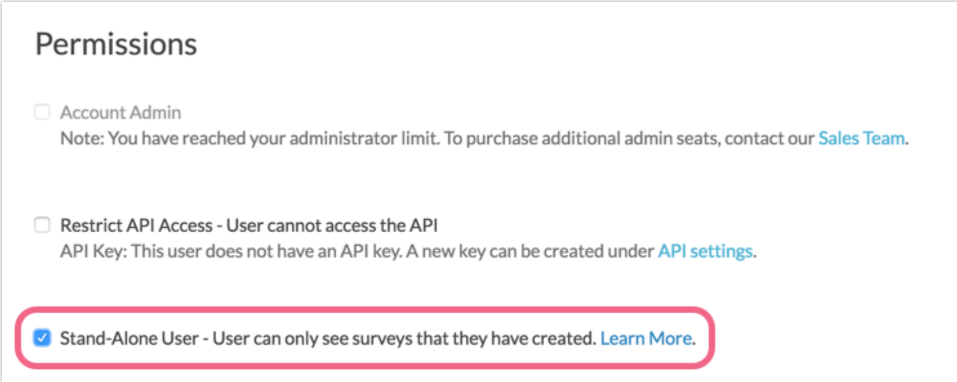
Delete Roles

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).



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

Team Managers

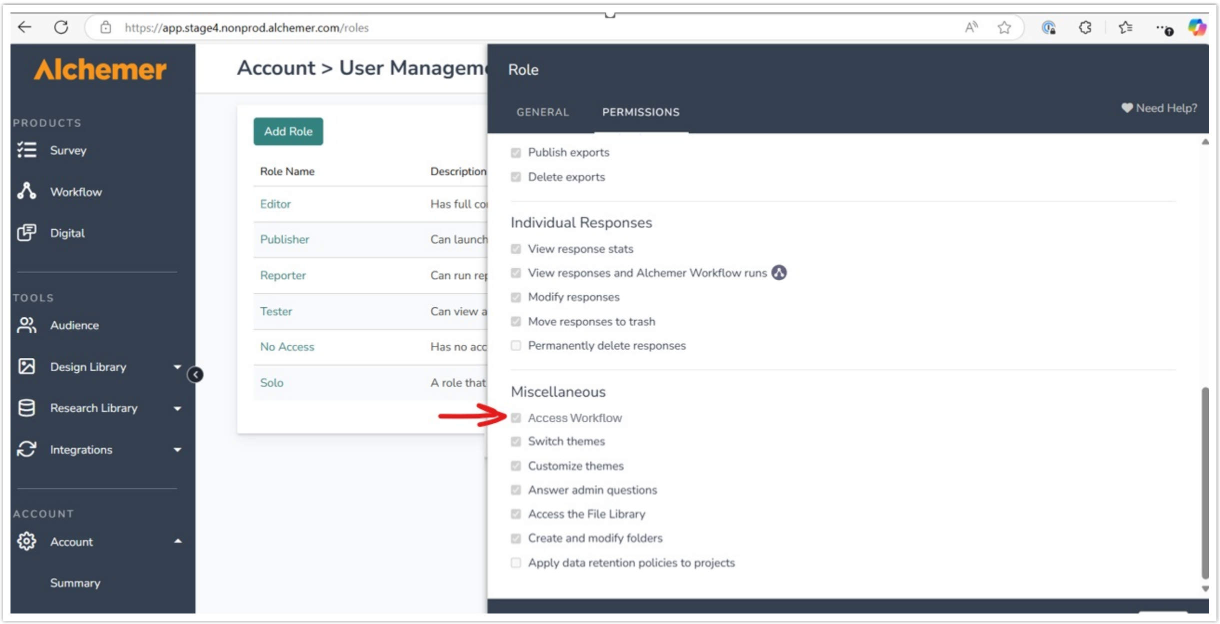
When editing a Role, you can make that user a Team Manager. The Team Manager has the following additional permissions:

- 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



Summary

Teams are the foundation of access control in Alchemer:

- In **Survey**, they control which surveys users can access
- In **Dashboard**, they control what data users can see by default
- Combined with sharing settings, Teams enable secure and flexible access across your organization

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