

Form Settings Page

The Module Levels Tab of Settings Page can be accessed from the Main Menu. The system default module levels for the module are visible in the Module Levels Table. New module levels with customizable permissions can be created and managed on this tab.

Settings

Forms > Settings > Module Levels

Module Levels

New Module Level

Module Level Name	Actions
Admin	
Guest	
Manager	
Office Administrators	
Staff	

There are four system default module levels associated with the Forms Module. An explanation of the permissions associated with each default module level are shown in the Forms Module Level Permissions Table below.

System default module levels cannot be customized.

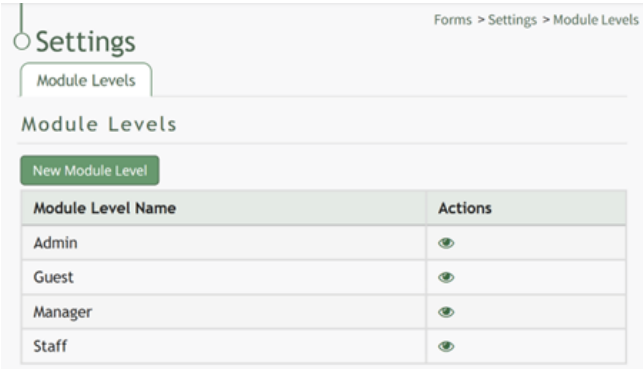
Forms Module Level Permissions Table	
Module Level	Permissions
Admin	Convert database to from, delete, add form, Customform (delete / edit / view / upload pdf / list / delete all customform, manage submissions, change status, design, download pdf), Admin (manage roles), Distribute, Create Form, View Submissions, Can Skip Payments, Can Edit Payment Form Entries, Formgroup (list / add / edit / delete / view formgroup)
Guest	Customform (view / list customform, download pdf), View submissions
Manager	Add form, Customform (edit / view / upload pdf / list customform, manage submissions, design, download pdf), Create Form, View Submissions
Staff	List Customform, View Submissions

New Module Levels can be created in order to customize module level permissions to suit your organization's needs. An explanation of the icons associated with customized module levels have been provided in the table below.

Module Level Customization Icons	
Icon	Explanation
	The eyeball icon allows you to view users assigned to the module level as well as the permissions assigned to them.
	The bulleted list icon allows you to assign permissions to customized module levels.
	The pencil icon opens the Edit Module Level Modal.
	The trashcan icon opens the Delete Module Level Confirmation Modal.

How To: Add a New Module Level (Forms Module)

To add a new module level in the Forms Module, go to the Settings Page and select the “New Module Level” button.



This opens the New Module Level Modal.

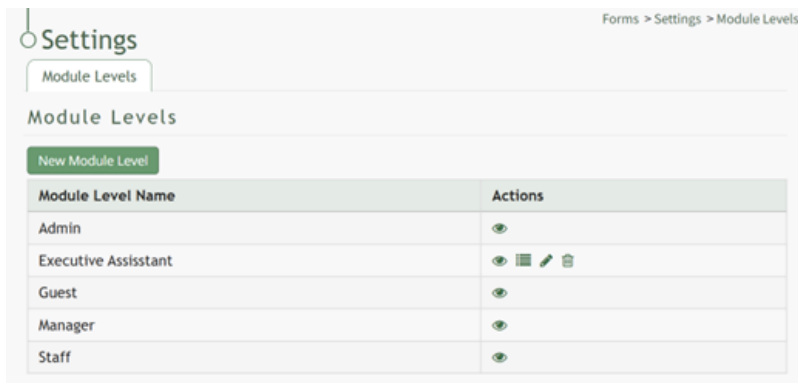
New Module Level

Module Level Name *

Save

Cancel

Input a name for the new module level and select the “Save” button.



The new module level will now show in the module level table on the Settings Page. Module levels created by your organization can be customized. The table below explains the action icons shown to the right of the custom module level.

Module Level Customization Icons	
Icon	Explanation
	The eyeball icon allows you to view users assigned to the module level as well as the permissions assigned to them.
	The bulleted list icon allows you to assign permissions to customized module levels.
	The pencil icon opens the Edit Module Level Modal.
	The trashcan icon opens the Delete Module Level Confirmation Modal.

Select the bulleted list icon to add permissions to the new module level.

Permissions for Executive Assistant ✕

- ☐ add-form
- ☐ admin
 - ☐ manage-roles
 - ☐ add-role
 - ☐ assign-hidden-roles
 - ☐ delete-role
 - ☐ edit-role
 - ☐ role-permissions
 - ☐ unassign-role
 - ☐ view-roles
- ☐ can-edit-payment-form-entries
- ☐ can-skip-payments
- ☐ convert-database-to-form
- ☐ create-form
- ☐ customform
 - ☐ changestatus
 - ☐ delete-all-customform
 - ☐ delete-customform
 - ☐ design
 - ☐ download-pdf
 - ☐ edit-customform
 - ☐ list-customform
 - ☐ manage-submissions
 - ☐ upload-pdf-customform
 - ☐ view-customform
- ☐ delete
- ☐ distribute
- ☐ formAggregation
- ☐ formgroup
 - ☐ add-formgroup
 - ☐ delete-formgroup
 - ☐ edit-formgroup
 - ☐ list-formgroup
 - ☐ view-formgroup
- ☐ list-specific-forms
- ☐ view-submissions

Click the checkboxes for the permissions you would like to be granted to the new module level.

Select "Save" when done added permissions.

A complete list of all permissions associated with the Forms Module have been provided below.

- ☐ add-form
- ☐ admin
 - ☐ manage-roles
 - ☐ add-role
 - ☐ assign-hidden-roles
 - ☐ delete-role
 - ☐ edit-role
 - ☐ role-permissions
 - ☐ unassign-role
 - ☐ view-roles
- ☐ can-edit-payment-form-entries
- ☐ can-skip-payments
- ☐ convert-database-to-form
- ☐ create-form
- ☐ customform
 - ☐ changestatus
 - ☐ delete-all-customform
 - ☐ delete-customform
 - ☐ design
 - ☐ download-pdf
 - ☐ edit-customform
 - ☐ list-customform
 - ☐ manage-submissions
 - ☐ upload-pdf-customform
 - ☐ view-customform
- ☐ delete
- ☐ distribute
- ☐ formAggregation
 - ☐ create-formAggregation
 - ☐ list-formAggregation
- ☐ formgroup
 - ☐ add-formgroup
 - ☐ delete-formgroup
 - ☐ edit-formgroup
 - ☐ list-formgroup
 - ☐ view-formgroup
- ☐ list-specific-forms
- ☐ view-submissions

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