

# USER ROLES AND PERMISSIONS

This document explains the various user types, roles, and permissions available within a Key Survey account. User roles and permissions allow you to define, assign, and manage the level of access each end-user has within your account.

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## User Types

Key Survey provides administrative controls for user management and security. For the purposes of this document, “users” refers to individuals who use the application.

### Back-end users

These are application users who have access to modules, such as the survey suite, reporting, and dashboards. They can build, edit, set up, launch, and monitor the data collection project and process. They also control permissions for their sub- and/or end-users.

The following account types can provision back-end users:

- Single Users
- Workgroups:
  - Multi-User
  - Multi-Access
- Super Admin (for the clients hosted outside of SaaS environment)

### Front-end users and respondents

These end-users can access surveys only when they are assigned or linked to them by users or administrators with higher-level permissions. They can be given permission to access dashboards, and view reports.

Key Survey has multiple options that allow these users to collect data, conduct surveys, and run assessments. You can publish survey links on the web or intranet, via email.

Depending on the distribution method we can define the following front-end users and respondents:

- Web respondents
- Third-party systems users (integration required)

## Key Survey Account Types

Key Survey provides two types of accounts, which are mutually exclusive: Single User and Workgroups. Under the Workgroups account type, there are two additional, mutually exclusive subtypes: Multi-User and Multi-Access.

### Single Users

This account type provides each end-user with a single login, which allows them to access the application modules available with your Key Survey service.

Users can access the following modules under the Single User account type:

1. Survey builder (any subscription)
2. Reporting (any subscription)
3. Data models (any subscription)
4. Contact manager (on-demand)
5. Dashboards (on-demand)

From this account type, you can set up your surveys and launch them via email or share via link.

## Workgroups

Workgroup accounts have an admin and several sub-users. All application modules available for the Single User account type are available for Workgroup accounts, but access rights are limited by their admins.

Users can access the following modules under the Workgroups account type:

1. Survey builder (any subscription)
2. Reporting (any subscription)
3. Data models (any subscription)
4. Contact manager (on-demand)
5. Dashboards (on-demand)
6. **Sub-user management (Workgroups only)**

From this account type, you can set up your surveys and launch them via email or share via link

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 surveys, contact managers or dashboards. All the data within their accounts are in a silo and can be accessed only by an account owner and the workgroup administrator.

### Multi-Access

It is a single account accessed by sub-users. This allows different users to work with the same content, but with different rights to alter it.

More about Workgroup account types and their controls, you can learn from [this document](#).

## Super Admin

Super admin (or an application admin) role is available only for private hosted customers. For SaaS model, this role is executed by Key Survey Team.

Such admins have oversight and control over the application and its accounts, including:

- Adding, suspending, deleting accounts
- Changing user type

- Setting up feature sets for each individual account
- Managing credits
- Managing expiration dates
- Changing login names
- Resetting passwords

## End Users and Distribution Methods

When your surveys are ready, there are variety of distribution methods available within the Key Survey Platform.

Depending on the distribution method, we define the following end users of the platform:

### Web respondents

The most basic distribution method will be a survey link. You can:

- Publish it online
- Share link directly
- Send via email:
  - By using built-in email functionality
  - By using your email client or any other email tool

Survey link can be open or password protected. Respondent list can be uploaded as a file or stored in the contact manager.

This method is limited to distribution surveys only.

### Third-party systems users

Key Survey is integrative platform, as you can get most from your data if you can share it within your existing IT infrastructure.

When there's a need to distribute data further, trigger follow up actions, share contact lists or any data bases, it can be done by means of API, data import and export capabilities. That's when the user of any other third-party system can benefit from Key Survey Platform data.

Your employees can use the same in-house login credentials, as Key Survey support Single Sign-On.

More about integration capabilities can be found in [this document](#).