Actions Templates Page

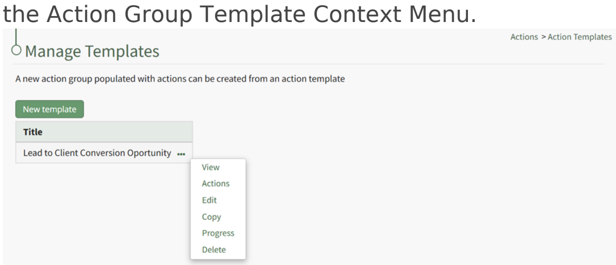
Selecting Templates from the Main Menu opens the Manage Templates Page that allows for the creation and management of templates that allow a new action group to be populated with action tasks. The creation of templates allows for the quick duplication of repeating / recurring action groups.

The Templates Table is located on the Manage Templates Page. Selecting the three-dot icon to the right of a template title opens a context menu with quick links for action group templates.

Template Context Menu Option Explanation	
Option	**Explanation**
View	Selecting View from the context menu opens the View Template Modal which states the template id number, title, description, and budget amount.
Actions	Selecting Actions from the context menu opens the Manage Actions Groups Page.

<table>
<tr>
<td>Edit</td>
<td>
Selecting Edit from the context menu opens the Edit Template Modal, which allows the Action Group Template to be edited.

How To: Edit an Action Group Template

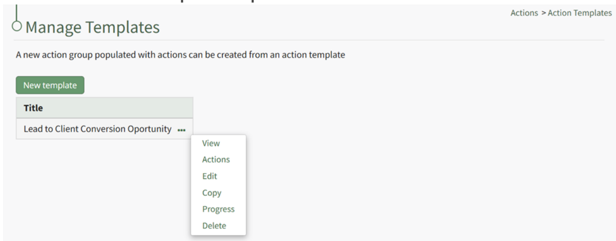
To edit an action group template, select Templates from the Actions Module Main Menu, opening the Manage Templates Page. Selecting the three dot icon to the right of the Action Group Template Title opens the Action Group Template Context Menu.


Select “Edit” on the context menu, opening the Edit Template Modal.
Make the desired changes to the action group template fields and select the “Save” button at the bottom of the modal when you are finished so that those changes will be reflected in the system.
</td>
</tr>
</table>

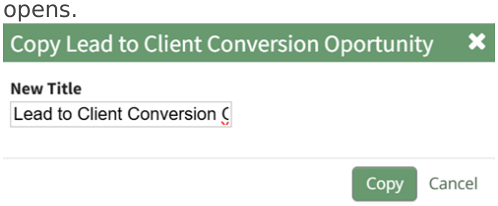
<table>
<tr>
<td>Copy</td>
<td>
Selecting Copy from the context menu opens the Copy Modal, which allows the new template to be renamed before being saved.

How To: Copy an Action Group Status

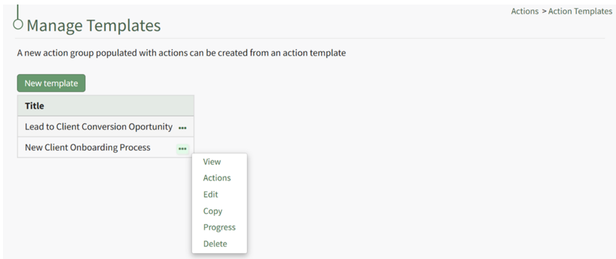
To copy an action group template, select Templates from the Actions Module Main Menu, opening the Manage Templates Page. Selecting the three-dot icon to the right of the Action Group Template Title opens the Action Group Template Context Menu.



Select “Copy” and the Copy TEMPLATE NAME Modal opens.



The modal allows for a new title to be given to newly created action group template. After inputting a new name, select the “Copy” button and the new Template will show on the Action Group Template Title Table.

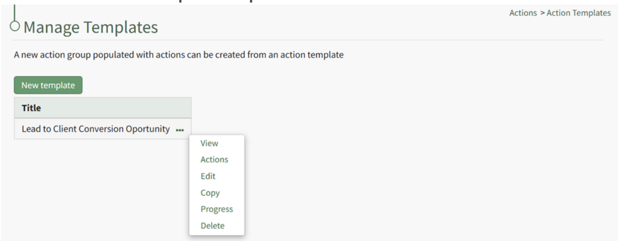


The Action Group Template Context Menu can be used to make any further adjustments as needed.
</td>
</tr>
<tr>
<td>Progress</td>
<td>Selecting Progress from the context menu opens a new page which shows the completion percentage of the action group template.</td>
</tr>
</table>

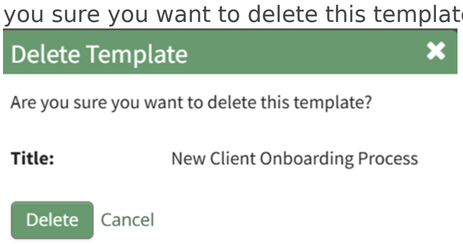
<table>
<tr>
<td>Delete</td>
<td>
Selecting Delete from the context menu opens the Delete Template Modal, which states the Title of the Template you are confirming deletion for. The template is permanently deleted through confirming this modal.

How To: Delete an Action Group Template

To delete an action group template, select Templates from the Actions Module Main Menu, opening the Manage Templates Page. Selecting the three-dot icon to the right of the Action Group Template Title opens the Action Group Template Context Menu.

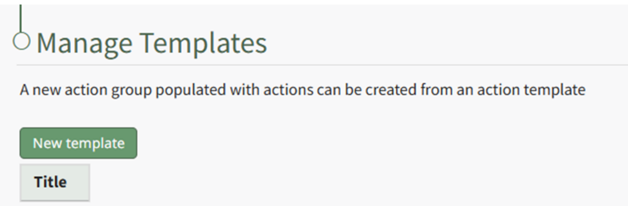


Select “Delete” and a Delete Template Confirmation Modal appears. The modal states the title of the action group template to be deleted and asks, “Are you sure you want to delete this template?”



Select “Delete” and the template will no longer show in the Actions Group Templates Title Table.
</td>
</tr>
</table>

If your user account has the appropriate permissions, , the New Template Button will show above the Template Table.

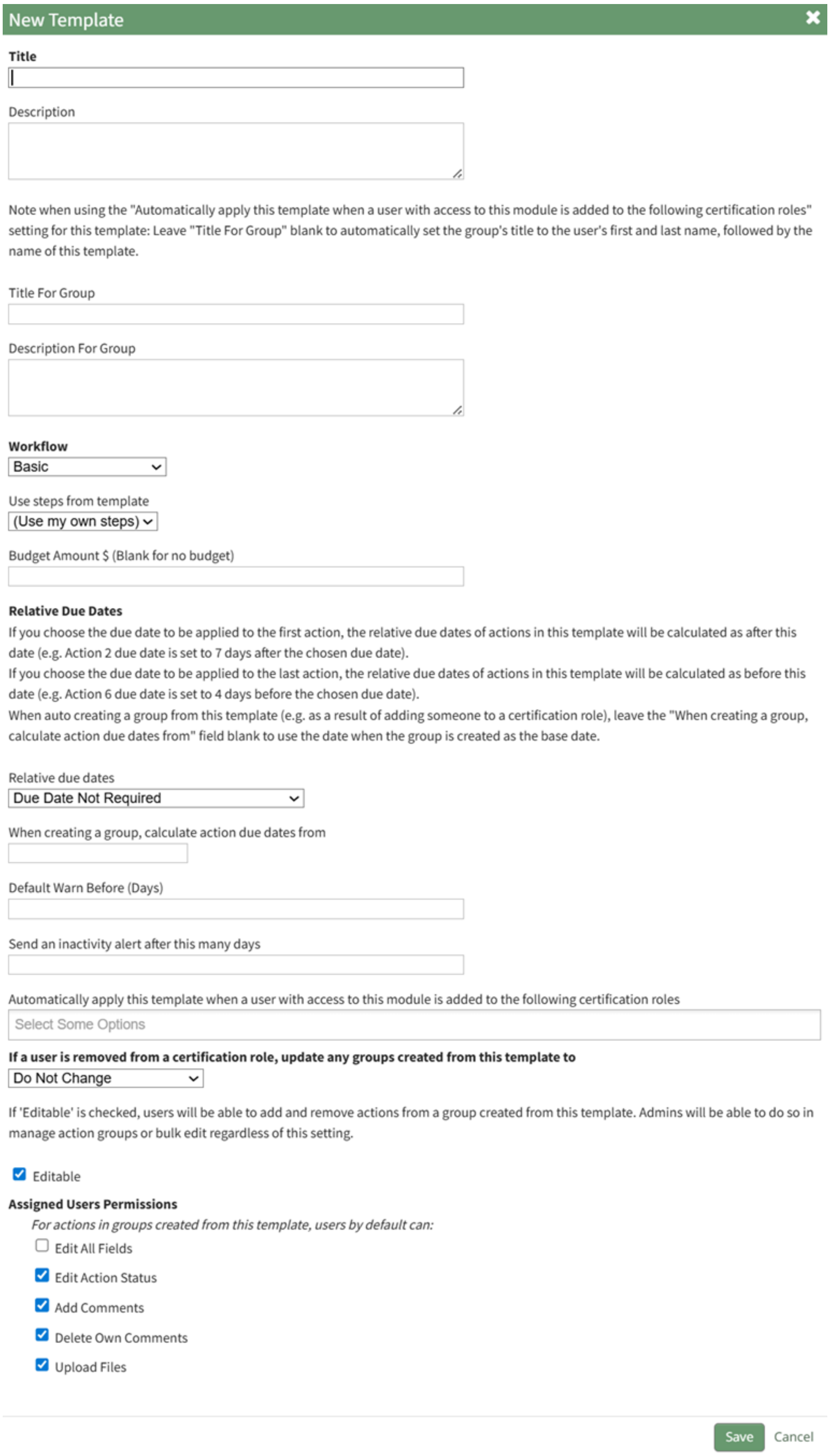


Clicking the New Template button will open the New Template Modal where new action group templates and their associated actions can be created.

How To: Create a New Action Group Template

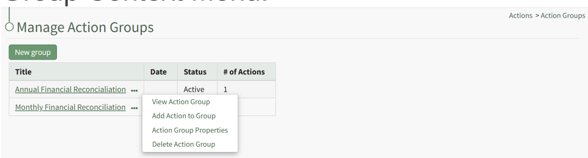
To create a New Action Group Template, select Templates from the Actions Module Main Menu, opening the Manage Templates Page.

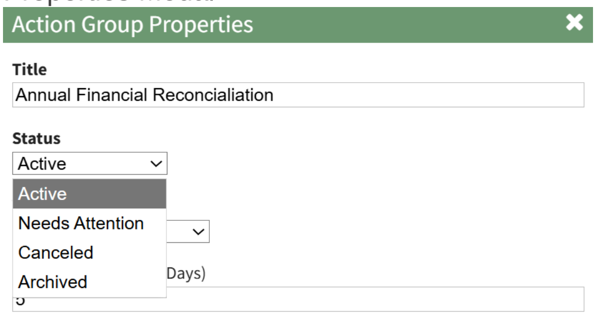
Select the “New Template” button, opening the New Template Modal.



There are several fields associated with the creation of an action group template.

Action Group Field Input Explanations	
Field	**Explanation**
Title	Input the title for the new action group.

<table>
<tr><td>Status</td><td>
An action group can be assigned a status of Active, Needs Attention, Canceled, or Archived. Select the appropriate status from the Status dropdown menu on the modal.
The status of an action group is manually applied and edited.
How To: Edit an Action Group Status
Action groups are manually assigned a group status that can be manually edited as needed for the action group. The default Group Statuses include Active, Needs Attention, Cancelled, and Archived.
To change the action group status, click the edit icon next to the group's title on the Actions Home Page, or select the Groups Page on the Main Menu, opening the Manage Action Groups Page. Then click the three-dot icon to the right of the action group to open the Action Group Context Menu.


Select “Action Group Properties” from the context menu opening the Action Group Properties Modal.


Select the appropriate action group status from the dropdown menu provided and select “Save”.
</td></tr>
<tr><td>Workflow</td><td>The workflow dropdown menu will offer the system default workflows (Basic, Basic with Approval, Complex with Approval), as well as any workflows that have been created by your organization.</td></tr>
<tr><td>Default Warn Before</td><td>Input a numerical value for the number of days a default warning will be sent. This input determines when action within the action group will turn from blue (the action is outstanding) to yellow (the action is nearing its due date).</td></tr>
</table>

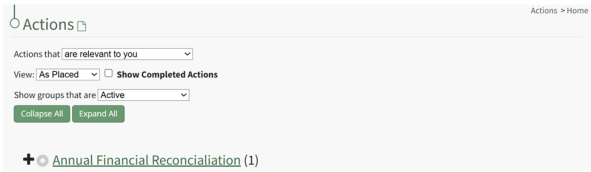
Date	The Action Group Date is flexible in concept and can be used as bet fit by your organization.
Description	Input a description for the action group.
Tags	Include any open, permissive, or restrictive tags as desired.
Budget ($)	Leave this blank if you do not want to generate a new budget in the Finance Module for the Action Group. Input a dollar amount to create the budget.

Budget Alerts

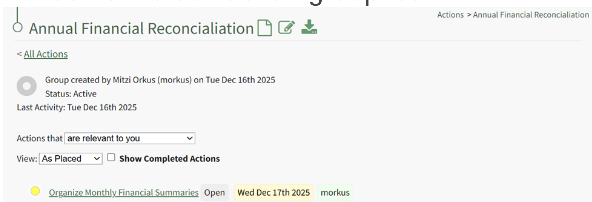
Click "Add Alert" in the Budget Alerts Section to create a budget alert to be associated with the action group budget. This will expand the modal displaying budget alert preferences.

How To: Add A Budget Alert for an Action Group

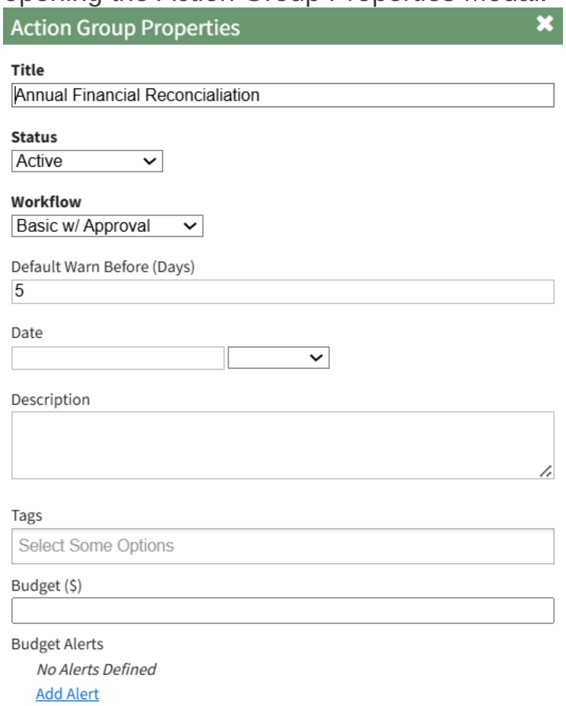
To add a budget alert for an action group, edit the group from the Groups Page, or go to the Actions Home Page and click the title of the action group you wish to create a budget alert for.



This opens the specific action group page. The second icon to the right of the action group header is the edit action group icon.



Select the Action Group Properties Icon, opening the Action Group Properties Modal.



Select the clickable “Add Alert” link, expanding the modal to include new fields.

The alert can be triggered by the amount remaining in the budget falling below a specified amount, or if the percentage remaining falls before a specified percentage. Budget alerts can be sent to users or roles. Input the preferred alert specifics and select add. The newly saved budget alert will show as saved in the modal.

Budget Approvers	Select the desired budget approver group from the dropdown menu. Note: Budget approval groups at the Action Group level must be created on the Settings Page: Budget Approvers Tab.
Send an Inactivity alert after # of days	An Action Group inactivity alert will be sent to the designated users / roles after a specified number of days of inactivity. Input a numerical value telling the system to send a notice after the specified days of inactivity. Within an action group, a workflow status change, creating or completing an action, a file upload, or action comment will reset the inactivity alert. Permission for comments to reset the inactivity alert is a customizable preference.
Send the inactivity alert to	Input the users and roles you wish to receive the inactivity alert.
Admins	Input the users who are to be identified as Admins for the Action Groups.
Users / Roles who can view this group	Select the Users / Roles who can view this action group. The users / roles selected will have view only permissions for every action within the action group.
Users / Roles who can edit their own actions	Select the Users / Roles who can edit their own actions. The users / roles selected will have the ability to edit any actions they created or are assigned to in the action group.

Focal Point User For this Group	Identify the focal point user of the group. This field is purely informational. There are no permissions associated with the focal point designation. Organization can utilize this field to identify a key contact for an action group. If this action group is being utilized for certification or training processes, using the relevant individual’s name as the focal point provides a database reference that enables reports and organizational capabilities. Only one user can be designated as the focal point.
Assigned User Permissions Section *The permissions established in this section will be applied to all users in the group by default.*	
Edit All Fields	Selecting the "Edit All Fields" checkbox will remove all other checkboxes from the modal and will give all users in the action group the ability to edit action status, add comments, delete own comments, and upload files.
Edit Action Status	Selecting the "Edit Action Status" checkbox will give all assigned users in the action group the ability to edit the action status.
Add Comments	Selecting the "Add Comments" checkbox will give all users in the action group the ability to add comments to an action.
Delete Own Comments	Selecting the "Delete Own Comments" checkbox will give all users in the action group the ability to delete their own comments made regarding an action.
Upload Files	Selecting the "Upload Files" checkbox will give all users in the action group the ability to upload files to an action.

After inputting the appropriate information into the modal, select “Save”.

The new Action Group Template will be displayed on the Templates Page in the Action Group Templates Table.

Revision #6
Created 2025-12-08 22:21:09 UTC by Mitzi Orkus
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