

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.



Manage Templates Actions > Action Templates

A new action group populated with actions can be created from an action template

Title	
Alfa Test	...
CAF TEST	...

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.

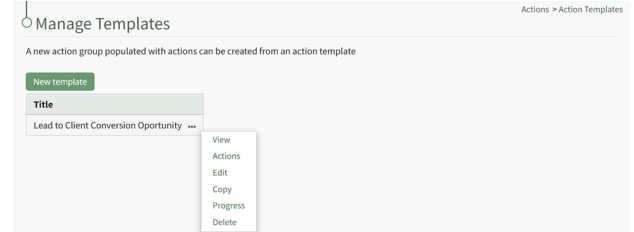
Template Context Menu Option Explanation	
Option	Explanation
View	Selecting View from the context menu opens the View Template Modal which states the template id number, title, description, and budget amount.
Actions	Selecting Actions from the context menu opens the Manage Actions Groups Page.

Edit

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.

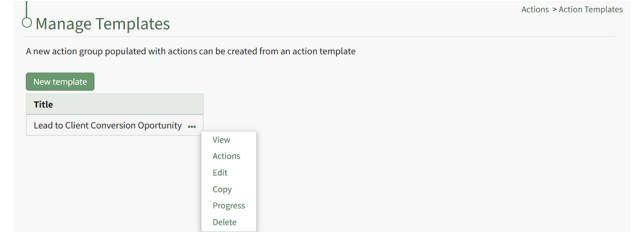
Make the desired changes to the action group template fields and select the "Save" button at the bottom of the modal when you are finished so that those changes will be reflected in the system.

Copy

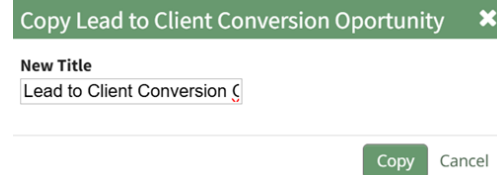
Selecting Copy from the context menu opens the Copy Modal, which allows the new template to be renamed before being saved.

How To: Copy an Action Group Status

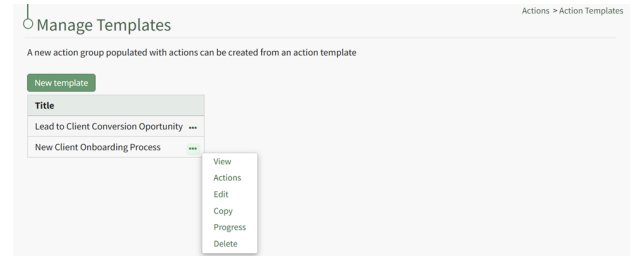
To copy an action group template, select Templates from the Actions Module Main Menu, opening the Manage Templates Page. Selecting the three-dot icon to the right of the Action Group Template Title opens the Action Group Template Context Menu.



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.

Progress

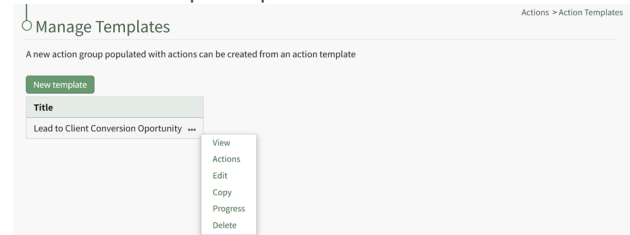
Selecting Progress from the context menu opens a new page which shows the completion percentage of the action group template.

Delete

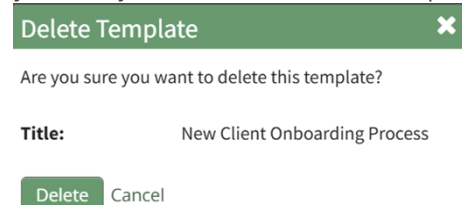
Selecting Delete from the context menu opens the Delete Template Modal, which states the Title of the Template you are confirming deletion for. The template is permanently deleted through confirming this modal.

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.

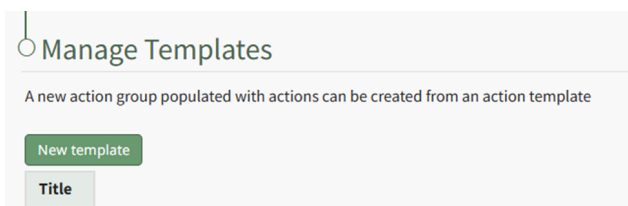


Select "Delete" and a Delete Template Confirmation Modal appears. The modal states the title of the action group template to be deleted and asks, "Are you sure you want to delete this template?"



Select "Delete" and the template will no longer show in the Actions Group Templates Title Table.

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.

Manage Templates

A new action group populated with actions can be created from an action template

New template

Title

Lead to Client Conversion Opportunity ...

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

New Template ✕

Title

Description

Note when using the "Automatically apply this template when a user with access to this module is added to the following certification roles" setting for this template: Leave "Title For Group" blank to automatically set the group's title to the user's first and last name, followed by the name of this template.

Title For Group

Description For Group

Workflow
 Basic

Use steps from template
 (Use my own steps)

Budget Amount \$ (Blank for no budget)

Relative Due Dates
 If you choose the due date to be applied to the first action, the relative due dates of actions in this template will be calculated as after this date (e.g. Action 2 due date is set to 7 days after the chosen due date).
 If you choose the due date to be applied to the last action, the relative due dates of actions in this template will be calculated as before this date (e.g. Action 6 due date is set to 4 days before the chosen due date).
 When auto creating a group from this template (e.g. as a result of adding someone to a certification role), leave the "When creating a group, calculate action due dates from" field blank to use the date when the group is created as the base date.

Relative due dates
 Due Date Not Required

When creating a group, calculate action due dates from

Default Warn Before (Days)

Send an inactivity alert after this many days

Automatically apply this template when a user with access to this module is added to the following certification roles
 Select Some Options

If a user is removed from a certification role, update any groups created from this template to
 Do Not Change

If 'Editable' is checked, users will be able to add and remove actions from a group created from this template. Admins will be able to do so in manage action groups or bulk edit regardless of this setting.

Editable

- Assigned Users Permissions**
 For actions in groups created from this template, users by default can:
- Edit All Fields
 - Edit Action Status
 - Add Comments
 - Delete Own Comments
 - Upload Files

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.

Status

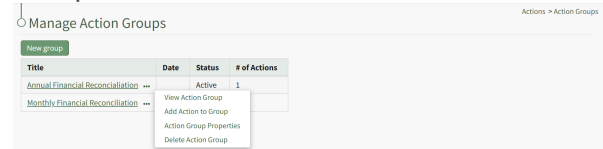
An action group can be assigned a status of Active, Needs Attention, Canceled, or Archived. Select the appropriate status from the Status dropdown menu on the modal.

The status of an action group is manually applied and edited.

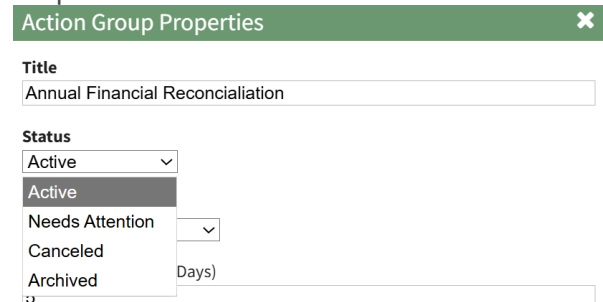
How To: Edit an Action Group Status

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.



Action Group Properties [X]

Title
Annual Financial Reconciliation

Status
Active [v]
Active
Needs Attention [v]
Canceled
Archived [v]
Days) []

Select the appropriate action group status from the dropdown menu provided and select "Save".

Workflow

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.

Default Warn Before

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).

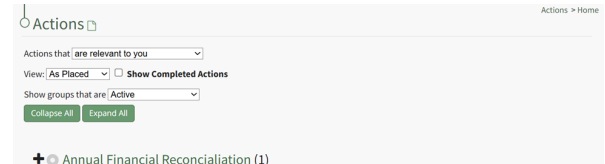
Date	The Action Group Date is flexible in concept and can be used as bet fit by your organization.
Description	Input a description for the action group.
Tags	Include any open, permissive, or restrictive tags as desired.
Budget (\$)	Leave this blank if you do not want to generate a new budget in the Finance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

Budget Alerts

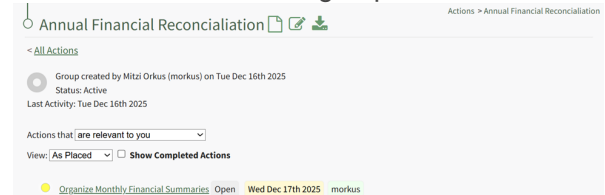
Click "Add Alert" in the Budget Alerts Section to create a budget alert to be associated with the action group budget. This will expand the modal displaying budget alert preferences.

How To: Add A Budget Alert for an Action Group

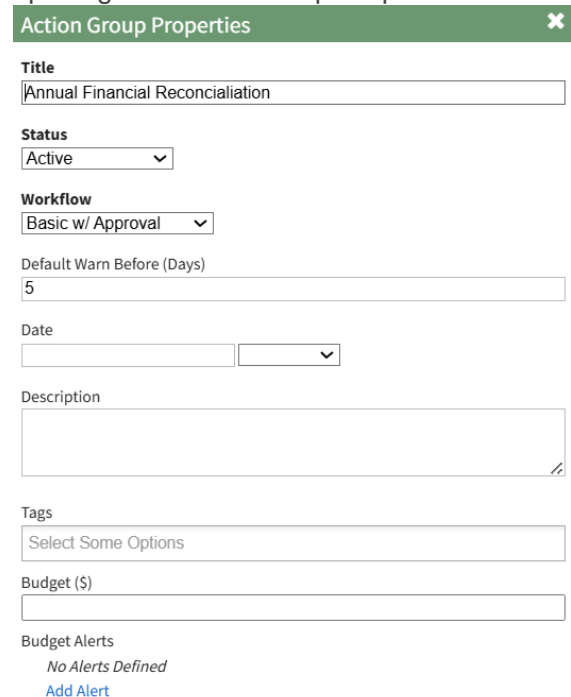
To add a budget alert for an action group, edit the group from the Groups Page, or go to the Actions Home Page and click the title of the action group you wish to create a budget alert for.



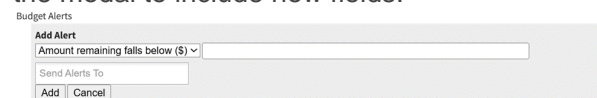
This opens the specific action group page. The second icon to the right of the action group header is the edit action group icon.



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

A screenshot of the 'Action Group Properties' modal. The modal has a title bar 'Action Group Properties' with a close button. Below the title bar are several fields: 'Title' (Annual Financial Reconciliation), 'Status' (Active), 'Workflow' (Basic w/ Approval), 'Default Warn Before (Days)' (5), 'Date' (empty), 'Description' (empty), 'Tags' (Select Some Options), and 'Budget (\$)' (empty). At the bottom, there is a 'Budget Alerts' section with the text 'No Alerts Defined' and a blue 'Add Alert' link.

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	<p>Select the desired budget approver group from the dropdown menu.</p> <p>Note: Budget approval groups at the Action Group level must be created on the Settings Page: Budget Approvers Tab.</p>
Send an Inactivity alert after # of days	<p>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.</p> <div data-bbox="815 539 1460 723" style="background-color: #e1f5fe; padding: 10px; border-left: 2px solid #00796b;"> <p>Within an action group, a workflow status change, creating or completing an action, a file upload, or action comment will reset the inactivity alert.</p> </div> <div data-bbox="815 757 1460 875" style="background-color: #e1f5fe; padding: 10px; border-left: 2px solid #00796b;"> <p>Permission for comments to reset the inactivity alert is a customizable preference.</p> </div>
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	<p>Select the Users / Roles who can view this action group.</p> <div data-bbox="815 1227 1460 1375" style="background-color: #e1f5fe; padding: 10px; border-left: 2px solid #00796b;"> <p>The users / roles selected will have view only permissions for every action within the action group.</p> </div>
Users / Roles who can edit their own actions	<p>Select the Users / Roles who can edit their own actions.</p> <div data-bbox="815 1503 1460 1650" style="background-color: #e1f5fe; padding: 10px; border-left: 2px solid #00796b;"> <p>The users / roles selected will have the ability to edit any actions they created or are assigned to in the action group.</p> </div>

Focal Point User For this Group	<p>Identify the focal point user of the group. This field is purely informational. There are no permissions associated with the focal point designation.</p> <p>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.</p> <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #00796b; margin-top: 10px;"> <p>Only one user can be designated as the focal point.</p> </div>
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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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