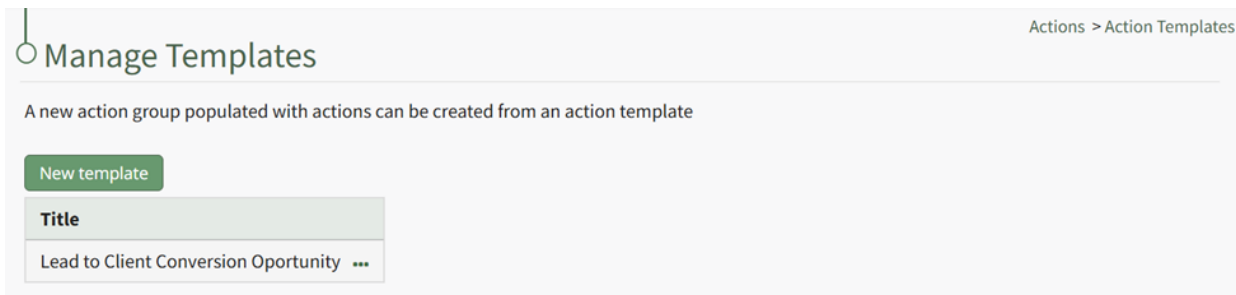


Create A New Action Group Template

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.

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

Use steps from template

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

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

If a user is removed from a certification role, update any groups created from this template to

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

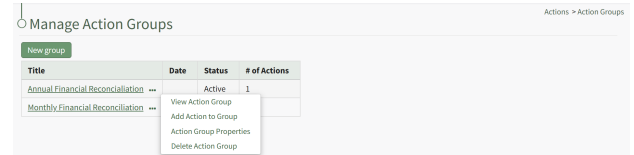
An action group can be assigned a status of Active, Needs Attention, Canceled, or Archived. Select the appropriate status from the Status dropdown menu on the modal.

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 ✕

Title
Annual Financial Reconciliation

Status
Active ▼
Active
Needs Attention ▼
Canceled
Archived ▼ (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).

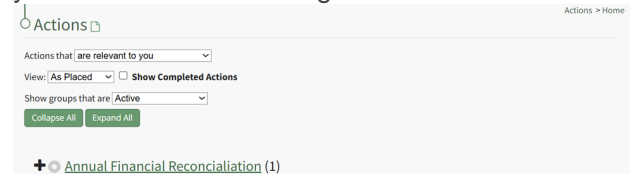
Date	The Action Group Date is flexible in concept and can be used as bet fit by your organization.
Description	Input a description for the action group.
Tags	Include any open, permissive, or restrictive tags as desired.
Budget (\$)	Leave this blank if you do not want to generate a new budget in the Finance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

Budget Alerts

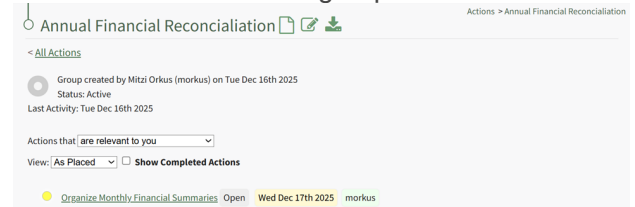
Click "Add Alert" in the Budget Alerts Section to create a budget alert to be associated with the action group budget. This will expand the modal displaying budget alert preferences.

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.

Action Group Properties

Title
Annual Financial Reconciliation

Status
Active

Workflow
Basic w/ Approval

Default Warn Before (Days)
5

Date
[] []

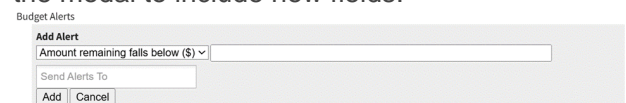
Description
[]

Tags
Select Some Options

Budget (\$)
[]

Budget Alerts
No Alerts Defined
[Add Alert](#)

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 1485 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 1485 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 1223 1485 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 1485 1655" 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="border: 1px solid #0070C0; background-color: #D9E1F2; padding: 5px; 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 #5

Created 2025-12-18 22:02:52 UTC by Mitzi Orkus

Updated 2026-01-24 23:37:11 UTC by Mitzi Orkus