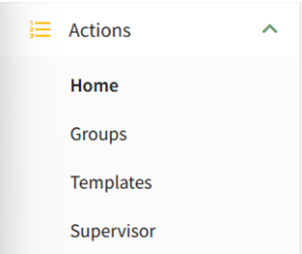
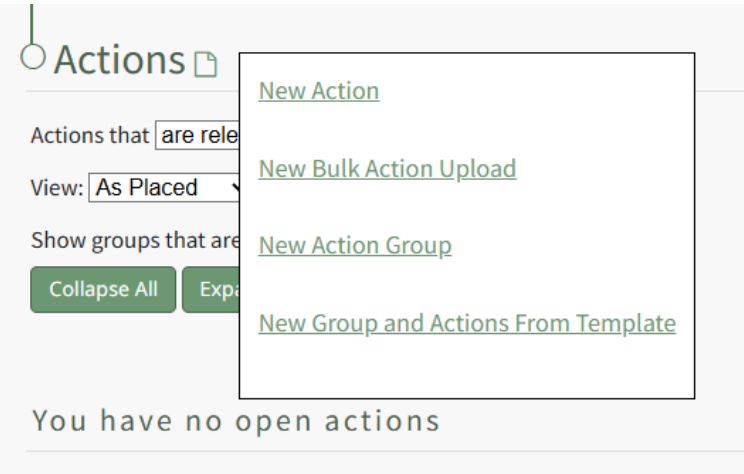


Create a New Action Group

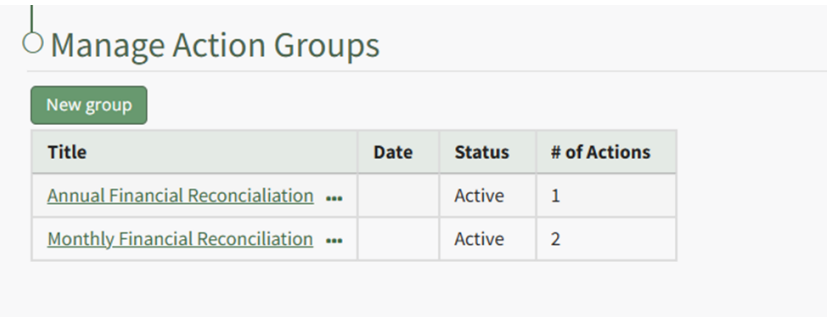
New Action Groups can be created from both the Home Actions Page as well as the Groups Page, both accessible from the Main Menu.



To create a new action group from the Actions Home Page, hover your icon over the page icon to the right of the Actions page header, displaying the Home Page Context Menu. Click “New Action Group” to open the New Action Group Modal.



To create a new action group from the Groups Page, select Groups on the Main Menu opening the Manage Action Groups Page.



Select the “New Group” button to open the New Action Group Modal.

New Action Group

Title

Status

Active

Workflow

Basic

Default Warn Before (Days)

5

Date

Description

Tags

Select Some Options

Budget (\$)

Budget Alerts

No Alerts Defined

[Add Alert](#)

Budget Approvers

Send an inactivity alert after this many days

Send the inactivity alert to

Select Some Options

Admins

Mitzi Orkus (morkus)

Users/Roles who can view this group

Select Some Options

Users/Roles who can edit their own actions

Select Some Options

Focal Point User for this group

Assigned Users Permissions

For actions in this group, users by default can:

☐ Edit All Fields

☒ Edit Action Status

☒ Add Comments

☒ Delete Own Comments

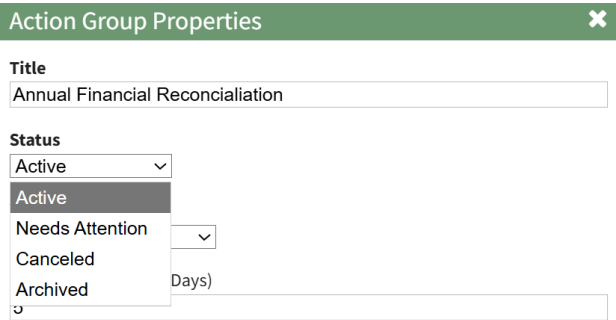
☒ Upload Files

Save

Cancel

The Action Group Field Input Explanation Table below explains the fields on the New Action Group Modal so that you can customize the action group.

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

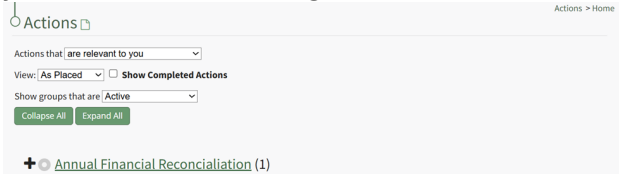
Status	An action group can be assigned a status of Active, Needs Attention, Canceled, or Archived. Select the appropriate status from the Status dropdown menu on the modal. The status of an action group is manually applied and can be edited. How To: Edit an Action Group Status Action groups are manually 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”.
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	To send a warning prior to the due date, input a numerical value for the default number of days. This input determines when the 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.

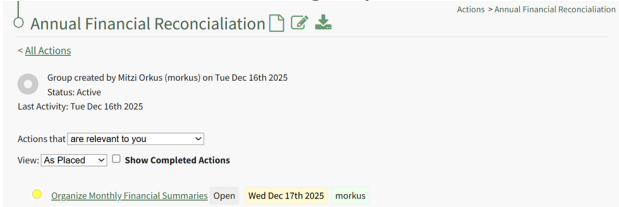
Click "Add Alert" in the Budget Alerts Section to create a budget alert to be associated with the action group budget. This will expand the modal displaying budget alert preferences.

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

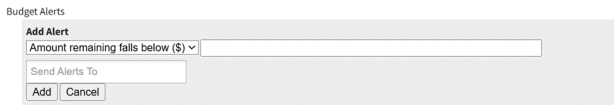
Budget (\$)

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	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 status change, creating or completing an action, a file upload, or action comment will reset inactivity. 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. Establishing a user as an Action Group Admin grants the ability to edit the group, plus view, and edit actions in the action group. Action Group Admins also have the ability to delete files associated with action in the action group.
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 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 <i>The permissions established in this section will be applied to all assigned users in the group by default.</i>	
Edit All Fields	Selecting the "Edit All Fields" checkbox will remove all other checkboxes from the modal and will give all assigned 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 making the appropriate selections in the New Action Group Modal, click the “Save” button to complete new group creation. The group is now created and has been added to the Groups Table on Groups Page.

Clicking on the group title will display the action group page which displays the associated actions in the action group in list format.