

Groups & users

Groups & users option enables the following functionality:

- To control which group or user is assigned to perform a specific step in the workflow;
- To create groups of users with the same permissions;
- To create groups to perform specific tasks in a project;
- To set Apptimized email notifications (i.e., which users will receive the email notifications).

Once the workflow reaches a specific step, the assignment rules will ensure that the task is assigned to the correct group of users (or a user). This will prevent from performing actions by unauthorized users.

All group members have equal permissions until the group manager is assigned.

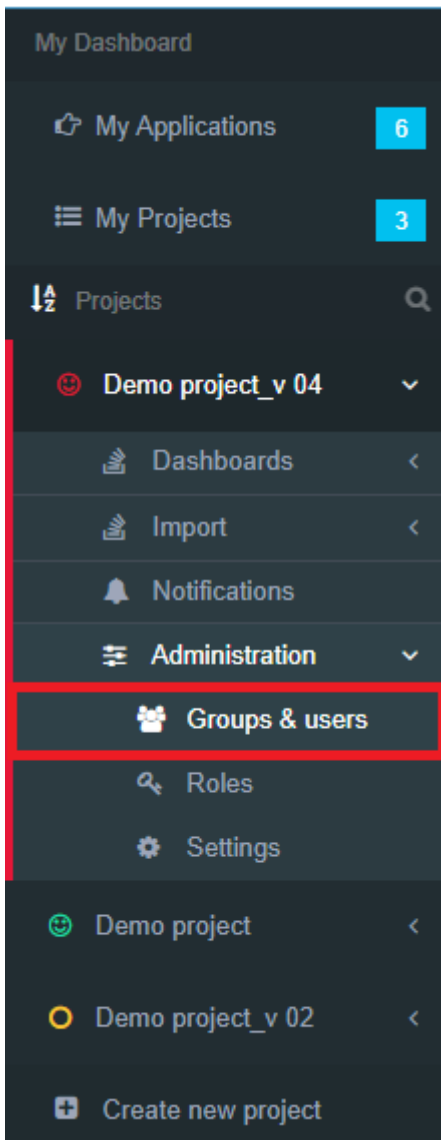
The **Project administrators** group appears as an initial default group after the project was created.

Project administrators can perform any workflow action.

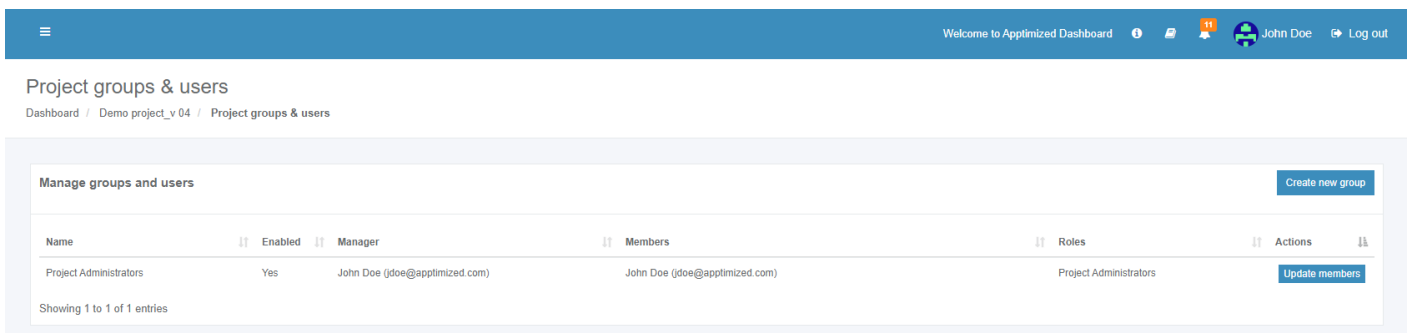
To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

Create a group

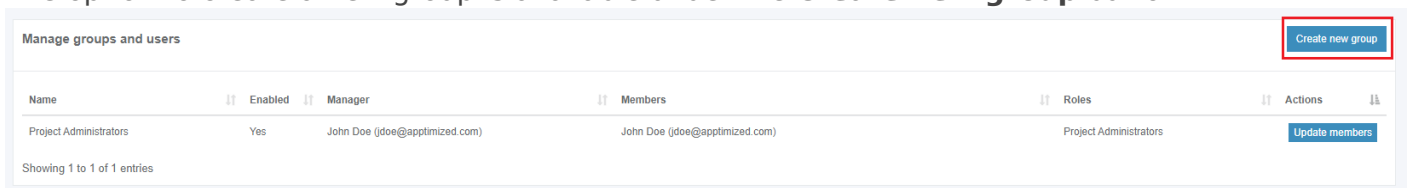
The option to create a group with needed permissions is available under **Groups & users** in project settings (**Project** menu > **Administration** > **Groups & users**).



Apptimized shows the following screen when successful:



The option to create a new group is available under the **Create new group** button:



Apptimized shows the following modal window when successful:

Add new group

Name*

☐

Enable

Roles:

Add

Cancel

The new group requires its name and role. All required fields are marked with an asterisk *.

Add new group

Name *

☐ Enable

Roles:

Add

Cancel

Add new group

Name *

Project staff

☒ Enable

Roles:

✕ Role 1 |

Project Administrators

Role 1

Add

Cancel

Add new group

Name *

Project staff

☒ Enable

Roles:

✕ Role 1 |

Add

Cancel

Adding a role to a group implies that the role has already been created (see [Project roles](#) chapter).

Apptimized shows the following notification and screen when successful:

Project groups & users

Dashboard / Demo project_v 04 / Project groups & users

Group 'Project staff' created successfully.

Manage groups and users

Create new group

Name	Enabled	Manager	Members	Roles	Actions
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators	Update members
Project staff	Yes	No manager		Role 1	Update members Edit Delete

Showing 1 to 2 of 2 entries

Manage a group

Users can be added to the group via the **Update members** button (**Update members** button > **Add users** field > Select a user from a drop-down list > **Save** button).

Manage groups and users

Create new group

Name	Enabled	Manager	Members	Roles	Actions
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators	Update members
Project staff	Yes	No manager		Role 1	Update members Edit Delete

Showing 1 to 2 of 2 entries

Update members in Project staff group

Group manager

Select manager from dropdown

Add users

Search for members to update or invite

Save

Cancel


Update members in Project staff group

Group manager

Select manager from dropdown

Add users

Search for members to update or invite

 John Doe jdoe@apptimized.com

Save

Cancel

Update members in Project staff group

Group manager

Select manager from dropdown

Add users

✕ John Doe jdoe@apptimized.com

Save

Cancel

Apptimized shows the following notifications and screen when successful:

Project groups & users

Dashboard / Demo project_v 04 / Project groups & users

Group members updated successfully.

User jdoe@apptimized.com added to group Project staff successfully.

Create new group

Manage groups and users

Name	Enabled	Manager	Members	Roles	Actions
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators	<div>Update members</div>
Project staff	Yes	No manager	John Doe (jdoe@apptimized.com)	Role 1	<div><div>Update members</div><div>Edit</div><div>Delete</div></div>

Showing 1 to 2 of 2 entries

If the person does not have an Apptimized account, the Email address will not appear in the drop-down menu. The option to invite a new user to Apptimized and to add the to-be-created user account to a group is available under the **Update members** button > **Add users** field > Enter Email > **Save** button. The person will be informed via Email (see **Register to Apptimized Portal**)

Update members in Project staff group

Group manager

Select manager from dropdown

Add users

o.hryshchenko@apptimized.com

Invite "o.hryshchenko@apptimized.com" by email

John Doe jdoe@apptimized.com

Save

Cancel

Project Invitation



Apptimized Notification <noreply@notification.apptimized.com>

To Olena Hryshchenko

Reply Reply All Forward ...

Thu 4/16/2020 2:26 PM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Apptimized Project Invitation

Hello

You have been invited to the group Project staff in the project Demo project_v 04 by John Doe .

In order to accept the invitation and join the project please click the link below:

<https://next-dev.apptimized.com/Account/GroupInvite?encoded=H4sIAAAAAAACpt6%252FT9X1PUFcTMnyV1Ub1ztXpRfWuCZV5ZZknpR%252BMcefL2MosrijOSM1LzsfIfEgoKSzNzMqtQUveT8XABKjwomOgAAAA%253D%253D.8jW60xLZVmTD6k%252B06Qaamg%253D%253D>

Please note: This link will expire in 24 hours.

Best regards,
Apptimized Support

The option to delete a group member is available under the **Update members** button > **Bin** symbol in front of the user's name > **Save** button.

Update members in Project staff group


Group manager


Select manager from dropdown

Add users

Search for members to update or invite

Existing members

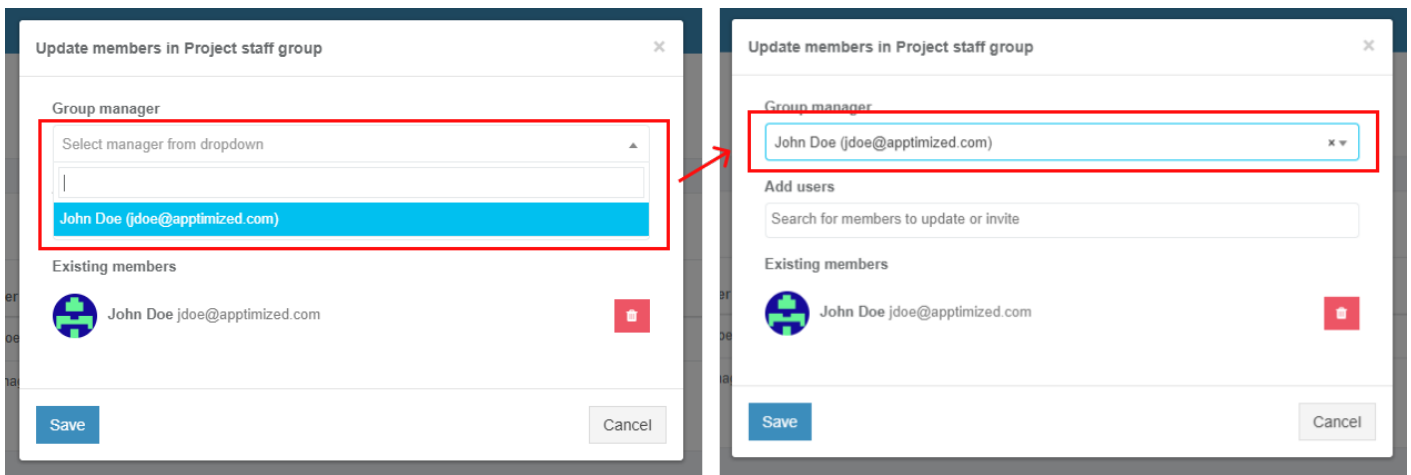
 John Doe jdoe@apptimized.com

Delete member 

Save

Cancel

The option to set a group manager is available under the **Update members** button > **Group manager** field > Select a user from a drop-down list > **Save** button.



A group can be changed with the **Edit** button and by following the same set of operations as for adding a new group.

Manage groups and users							Create new group
Name	Enabled	Manager	Members	Roles	Actions		
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators	Update members		
Project staff	Yes	No manager	John Doe (jdoe@apptimized.com)	Role 1	Update members	Edit	Delete

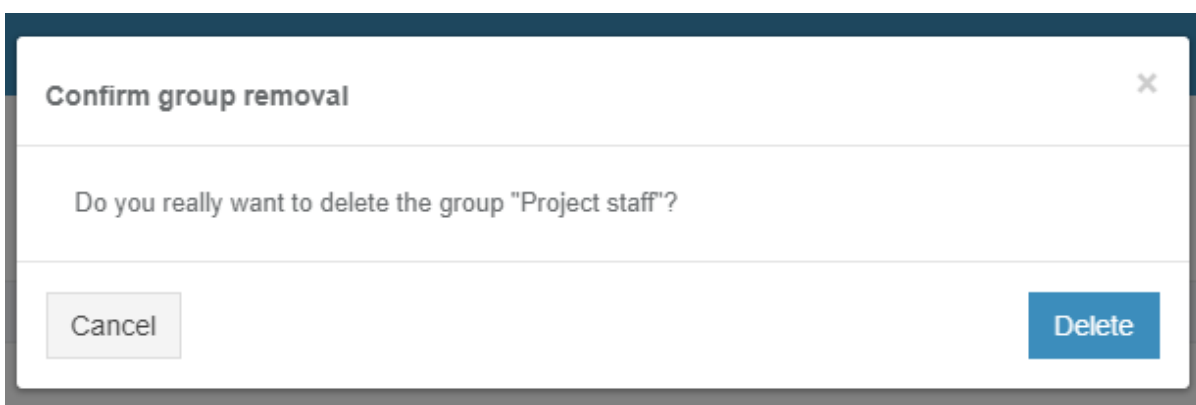
Showing 1 to 2 of 2 entries

The option to delete the group is available under the **Delete** button.

Manage groups and users							Create new group
Name	Enabled	Manager	Members	Roles	Actions		
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators	Update members		
Project staff	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Role 1	Update members	Edit	Delete

Showing 1 to 2 of 2 entries

Apptimized shows the following modal window:



Apptimized shows the following notification and screen when successful:

Manage groups and users						Create new group
Name	Enabled	Manager	Members	Roles	Actions	
Project Administrators	Yes	John Doe (jdoe@apptimized.com)	John Doe (jdoe@apptimized.com)	Project Administrators		Update members
Showing 1 to 1 of 1 entries						

Revision #3

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