

# 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 Aptimized 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.

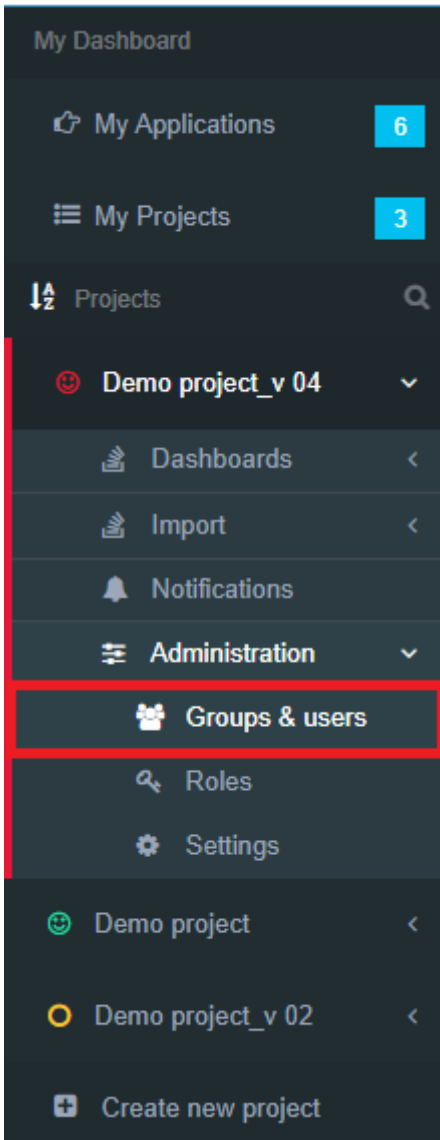
The **Project administrators** group appears as an initial default group after the project was created.

Project administrators can perform any workflow action.

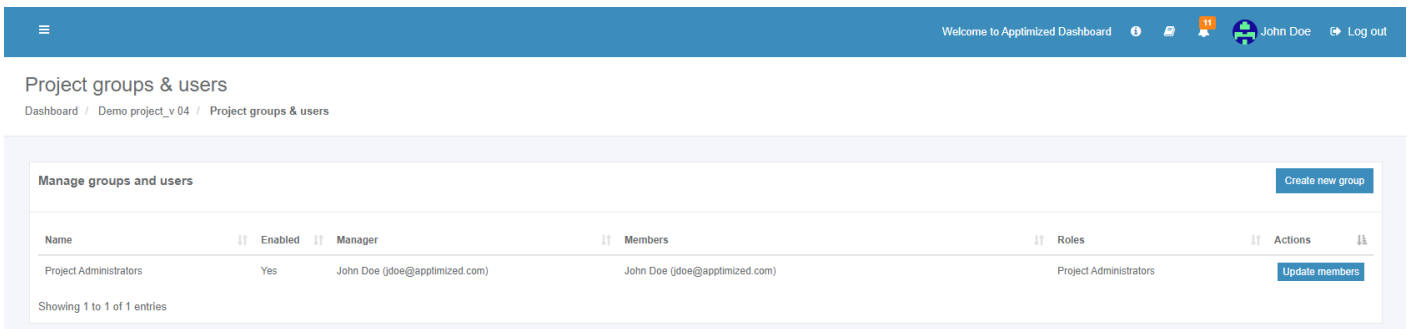
To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

## Create a group

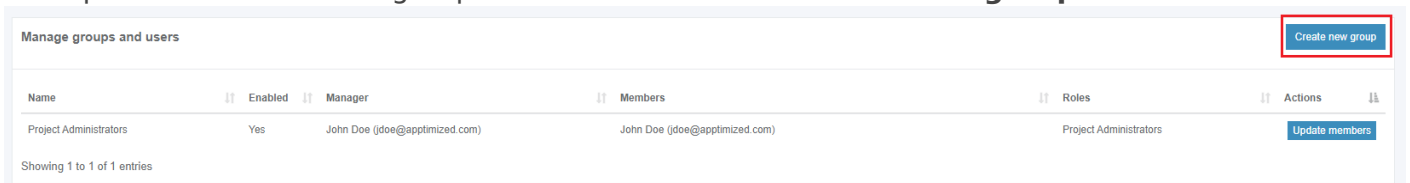
The option to create a group with needed permissions is available under **Groups & users** in project settings (**Project** menu > **Administration** > **Groups & users**).



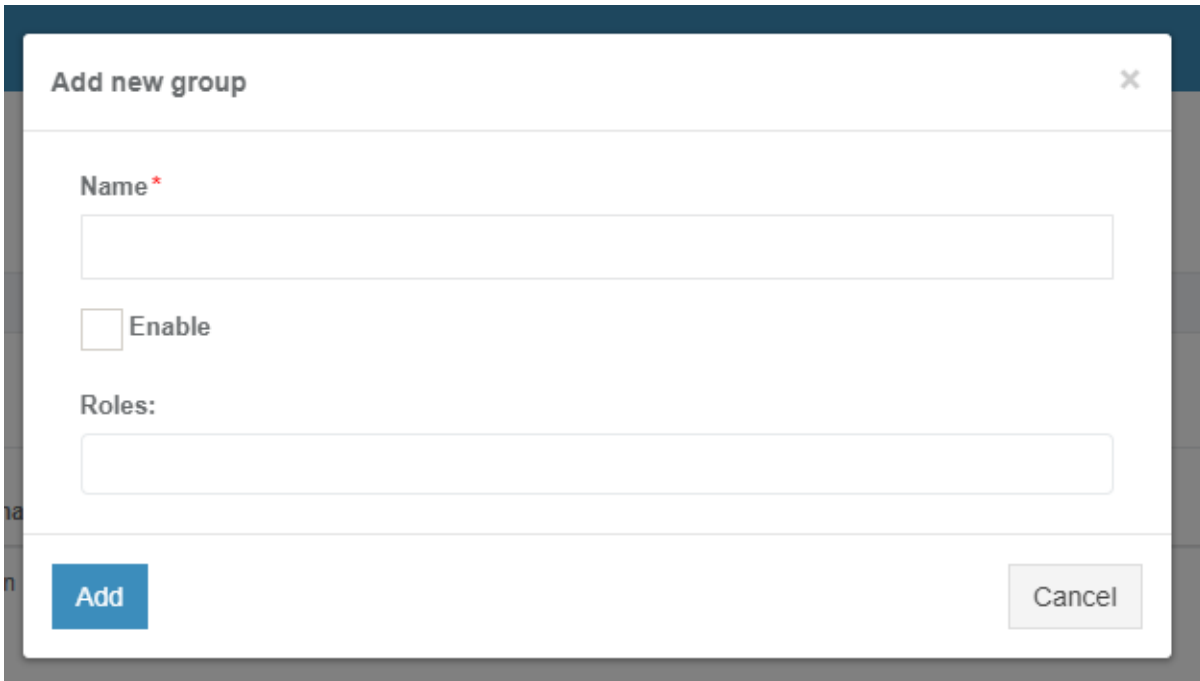
Apptimized shows the following screen when successful:



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



Apptimized shows the following modal window when successful:



The image shows a dialog box titled "Add new group" with a close button (X) in the top right corner. The dialog contains three main sections: a "Name" field with a red asterisk indicating it is required, an "Enable" checkbox, and a "Roles:" field with a red asterisk indicating it is required. At the bottom, there are two buttons: a blue "Add" button and a grey "Cancel" button.

**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 \***

Enable

Roles:

Project Administrators

**Role 1**

Add new group ✕

**Name \***

Enable

Roles:

**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	<span>Update members</span>
Project staff	Yes	No manager		Role 1	<span>Update members</span> <span>Edit</span> <span>Delete</span>

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	<span>Update members</span>
Project staff	Yes	No manager		Role 1	<span>Update members</span> <span>Edit</span> <span>Delete</span>

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.

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	<span>Update members</span>
Project staff	Yes	No manager	John Doe (jdoe@apptimized.com)	Role 1	<span>Update members</span> <span>Edit</span> <span>Delete</span>

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 Delete


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 .

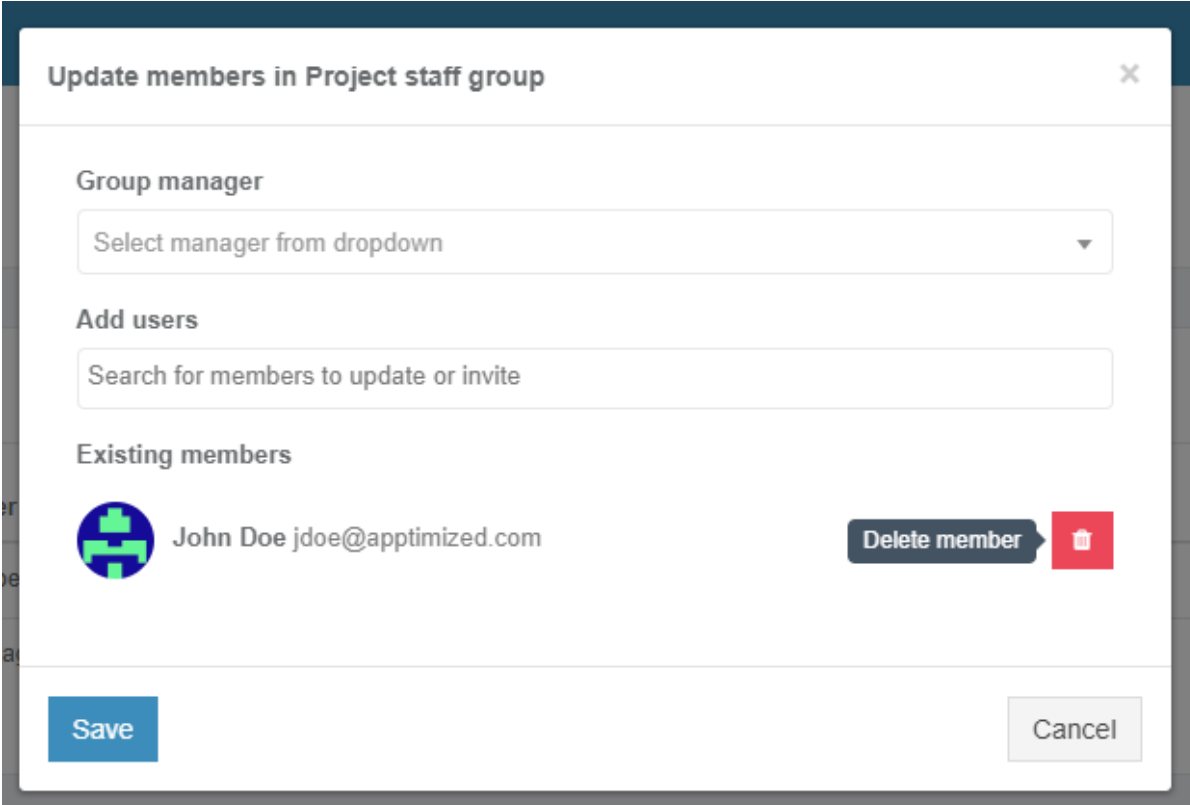
In order to accept the invitation and join the project please click the link below:

<https://next-dev.apptimized.com/Account/GroupInvite?encoded=H4sIAAAAAAAAAACpt6%252FT9X1PUFcTMnyV1Ub1ztXpRfWuCV5ZZknpR%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

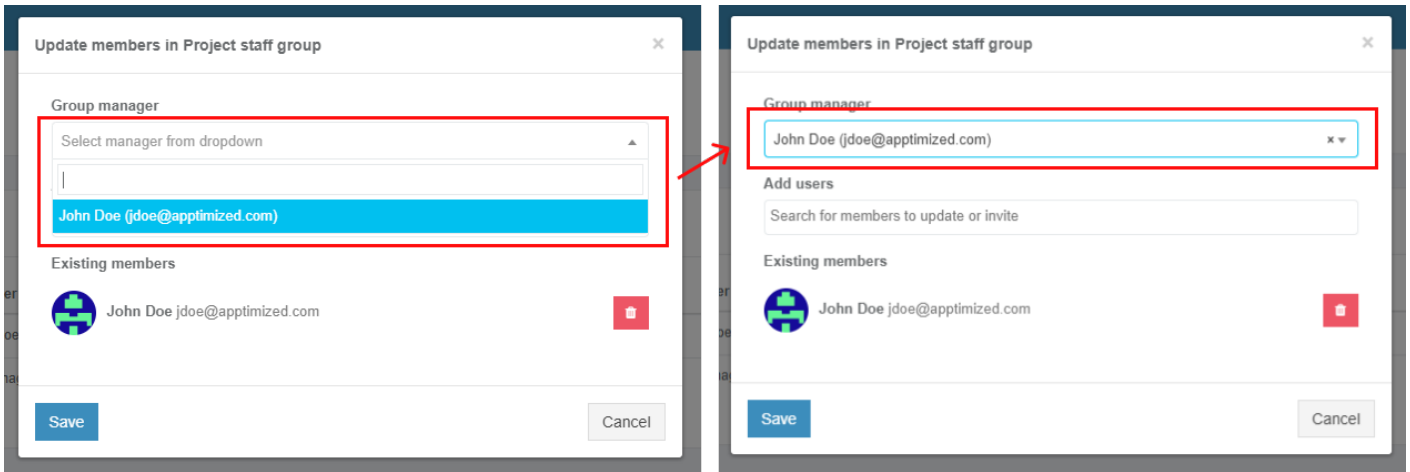
**Add users**  
Search for members to update or invite

**Existing members**

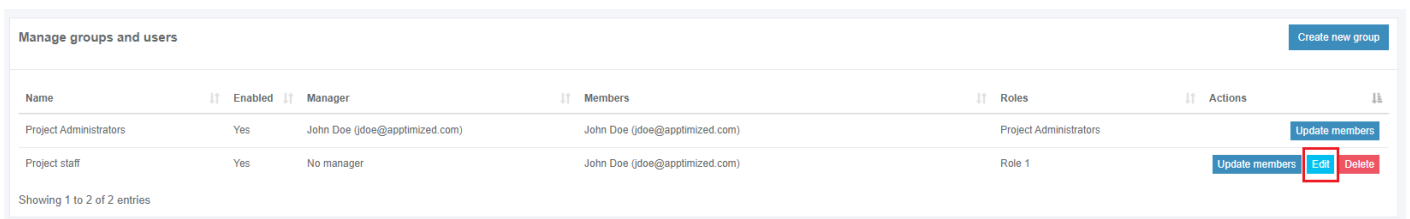
 John Doe jdoe@apptimized.com **Delete member** 

**Save** **Cancel**

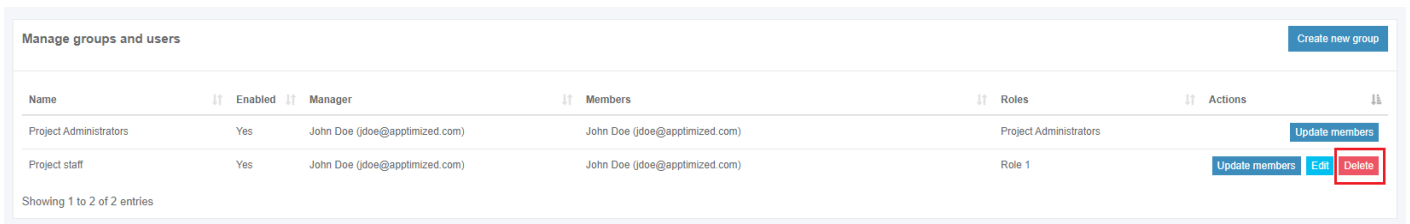
The option to set a group manager is available under the **Update members** button > **Group manager** field > Select a user from a drop-down list > **Save** button.



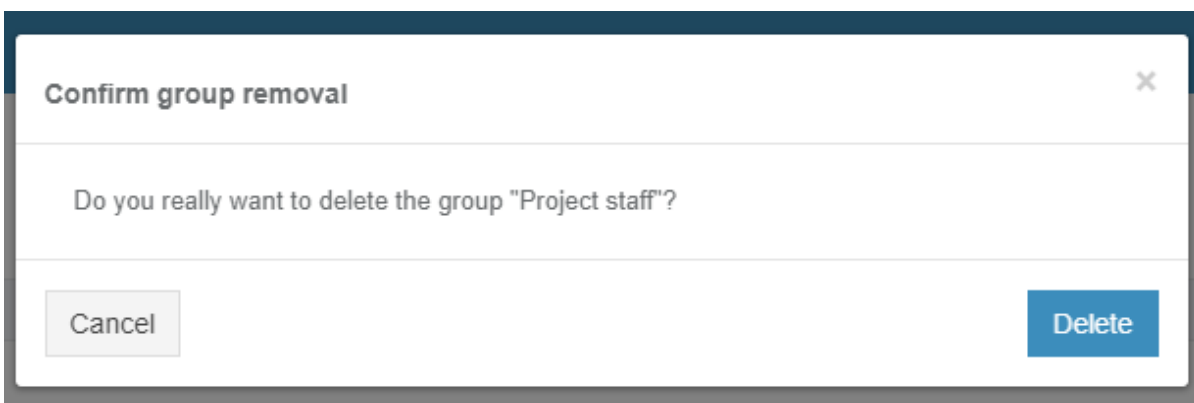
A group can be changed with the **Edit** button and by following the same set of operations as for adding a new group.



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



Apptimized shows the following modal window:



Apptimized shows the following notification and screen when successful:

## Project groups & users

Dashboard / Demo project\_v 04 / Project groups & users

Group Project staff removed 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

Showing 1 to 1 of 1 entries

### Revision #3

Created 7 June 2021 07:39:11

Updated 22 September 2021 06:48:14