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.

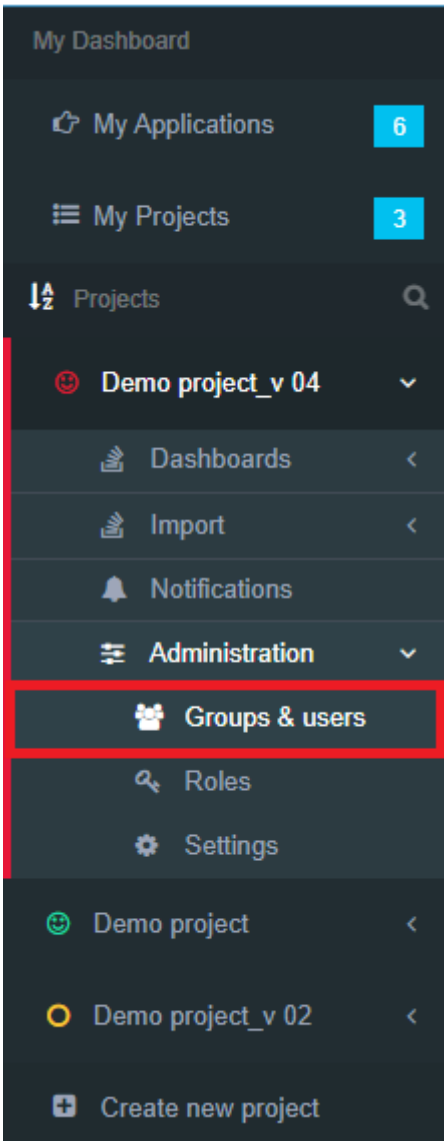
All group members have equal permissions until the group manager is assigned.

> The **Project administrators** group appears as an initial default group after the project was created.
> Project administrators can perform any workflow action.

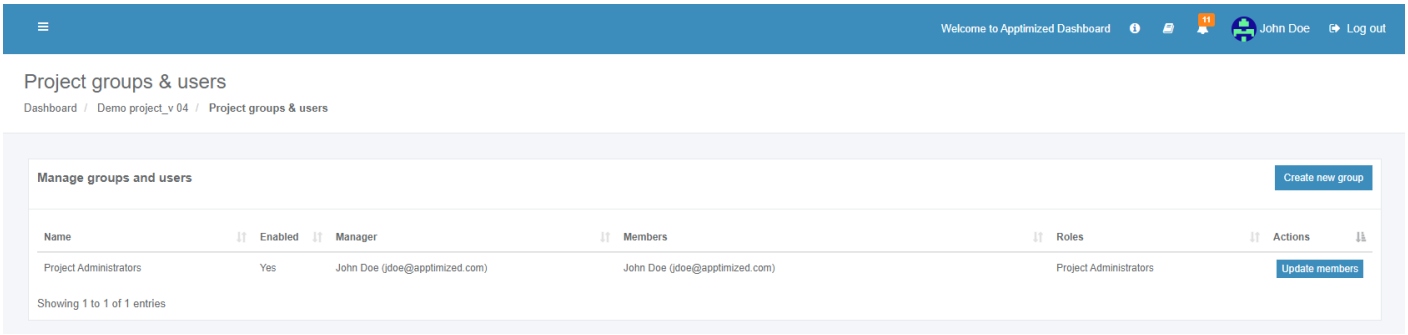
> To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

Create a group

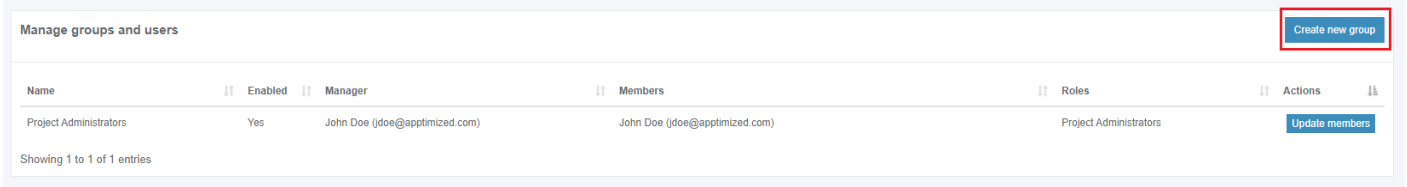
The option to create a group with needed permissions is available under **Groups & users** in project settings (**Project** menu > **Administration** > **Groups & users**).



Apptimized shows the following screen when successful:



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

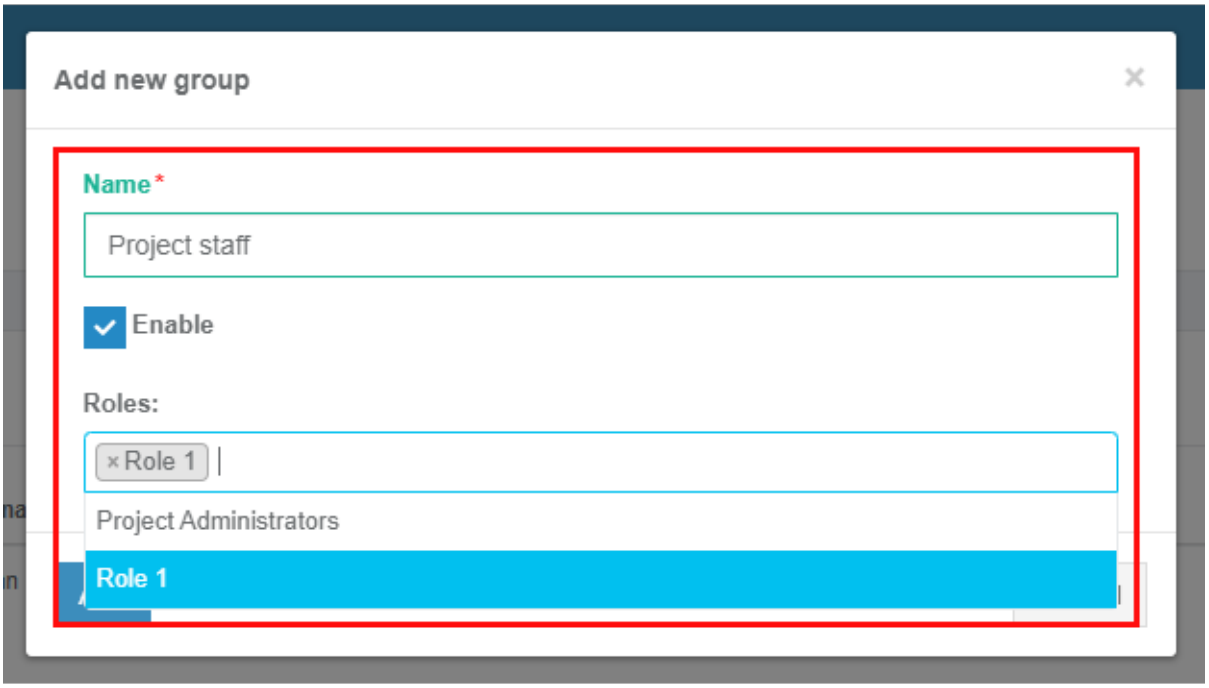


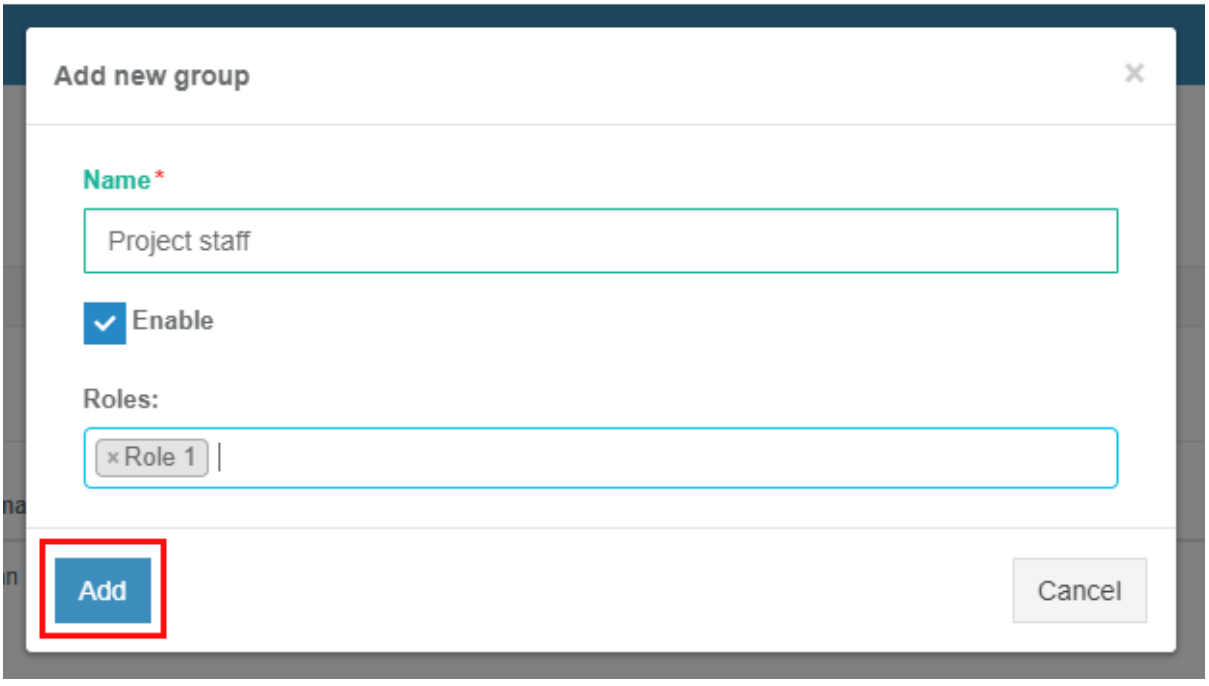
Apptimized shows the following modal window when successful:



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

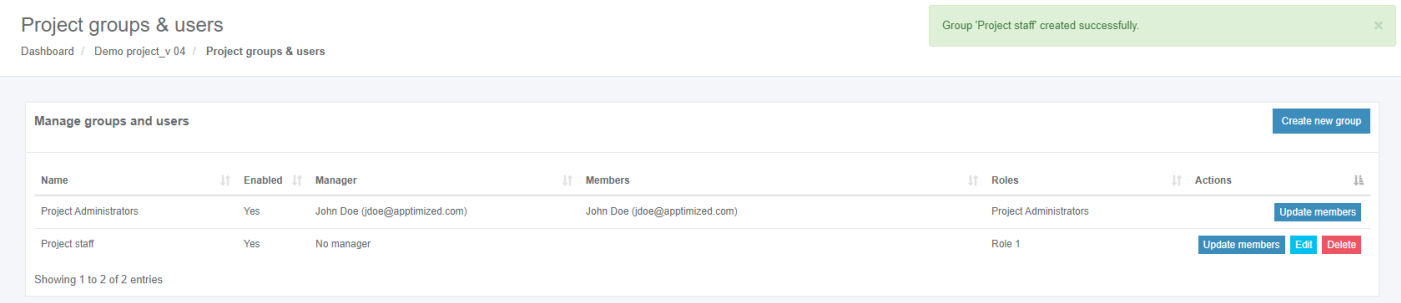

Add new group
Name *
Enable
Roles:
Add
Cancel


Add new group
Name *
Project staff
Enable
Roles:
× Role 1
Project Administrators
Role 1


Add new group
Name *
Project staff
Enable
Roles:
× Role 1
Add
Cancel

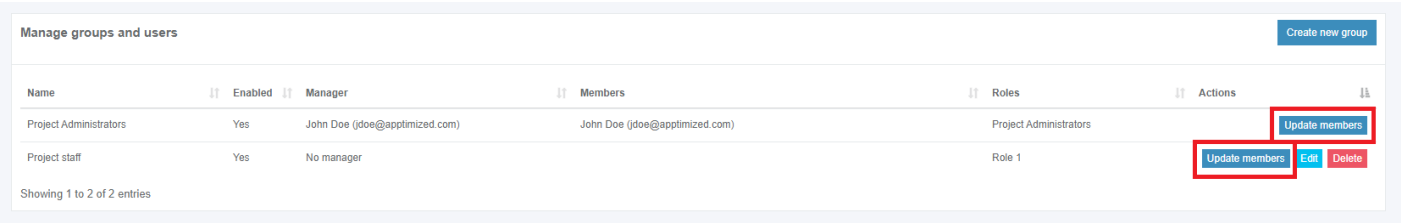
Adding a role to a group implies that the role has already been created (see **Project roles** chapter).

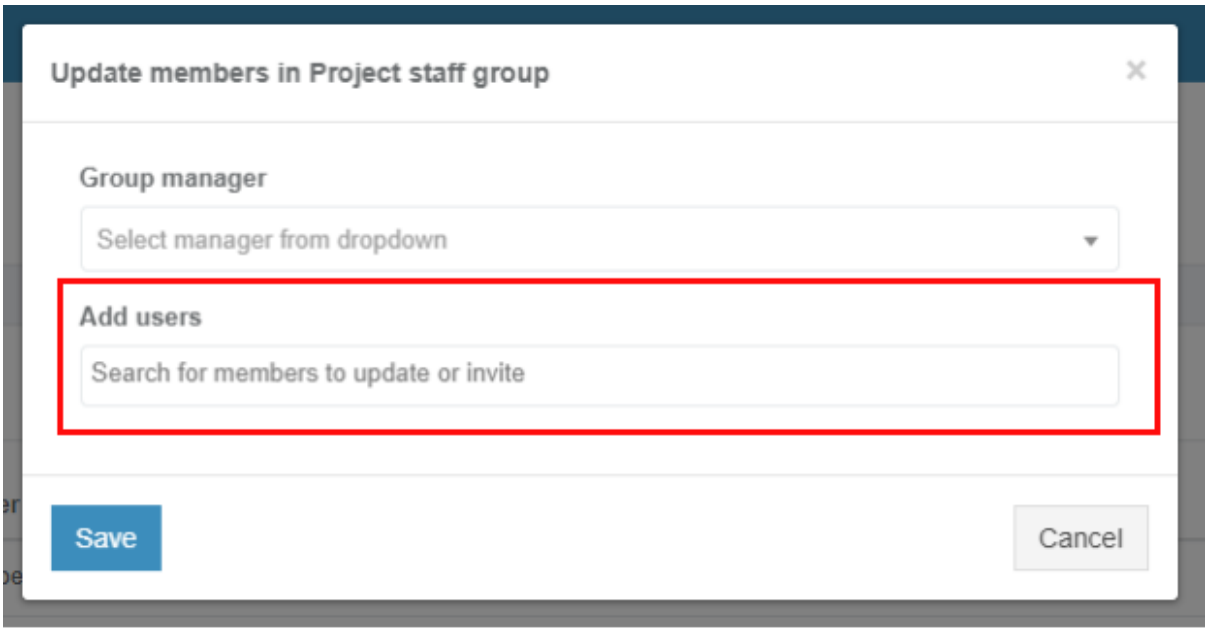
Apptimized shows the following notification and screen when successful:

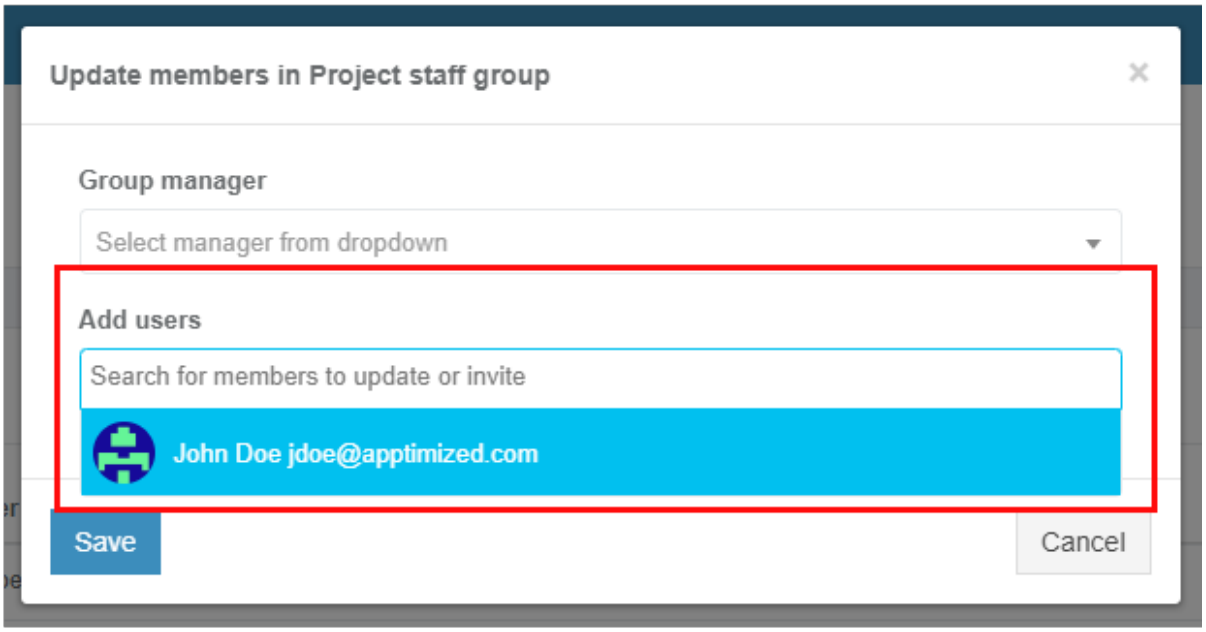


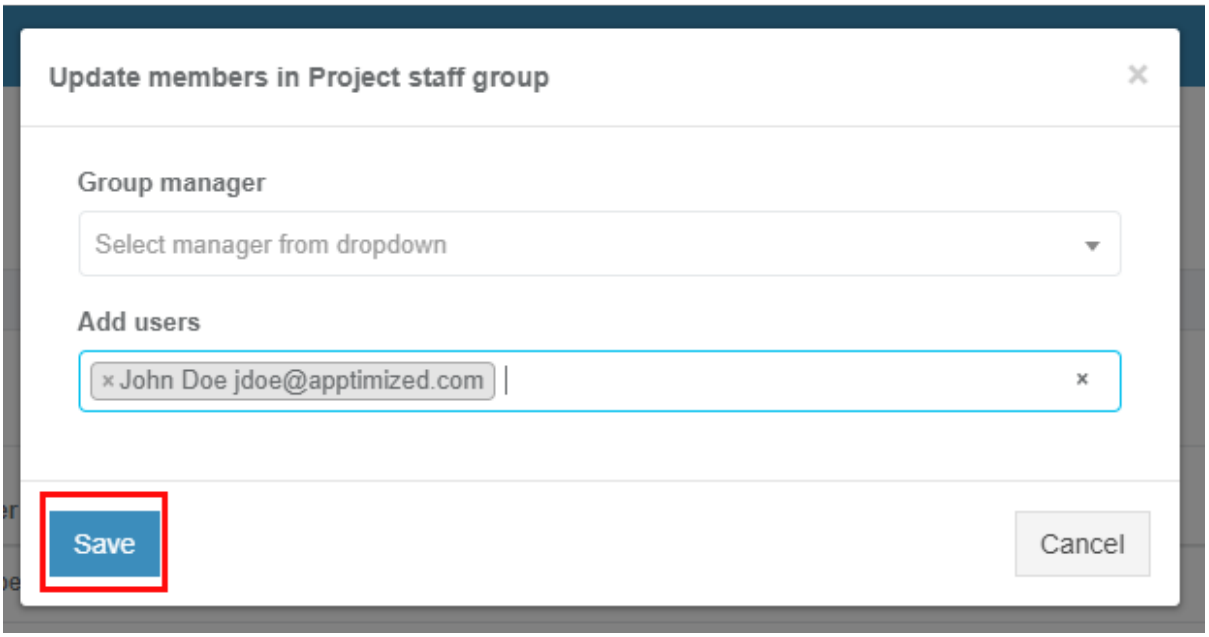
Manage a group

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).

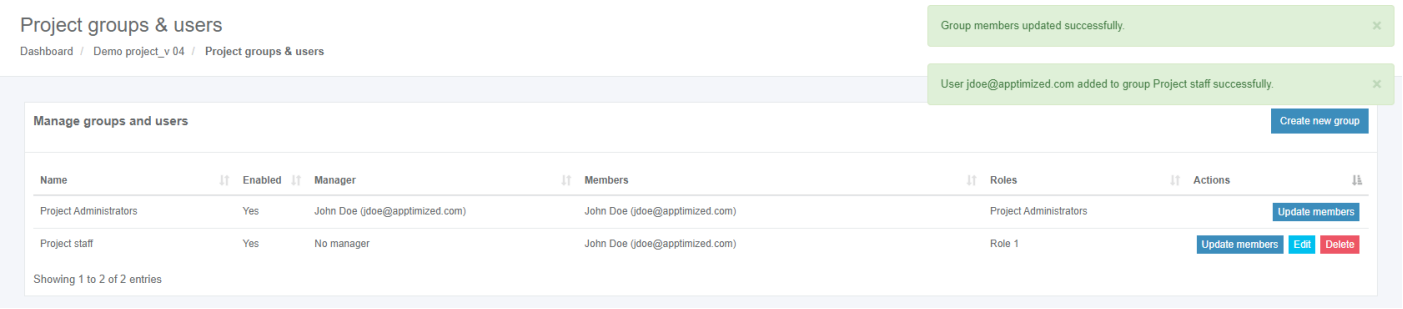



Update members in Project staff group
Group manager
Select manager from dropdown
Add users
Search for members to update or invite
Save
Cancel


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

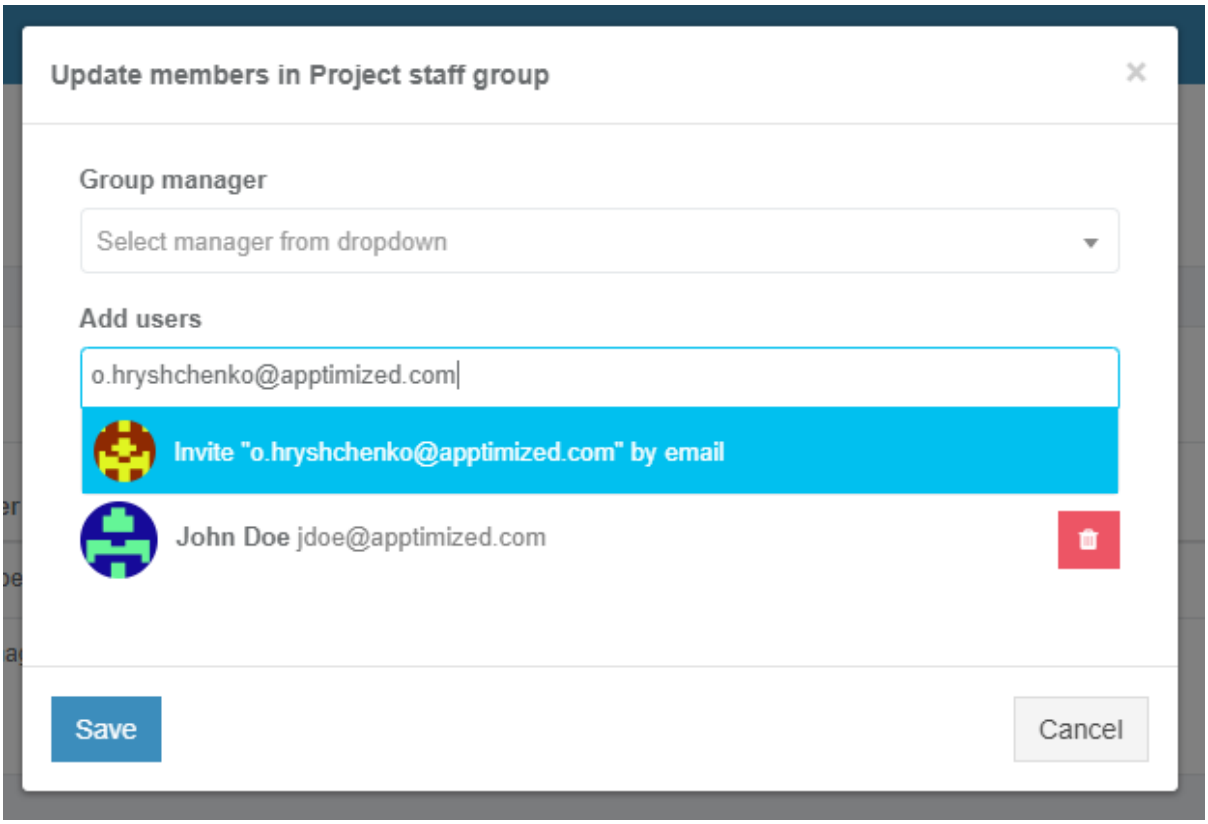

Update members in Project staff group
Group manager
Select manager from dropdown
Add users
John Doe jdoe@apptimized.com
Save
Cancel

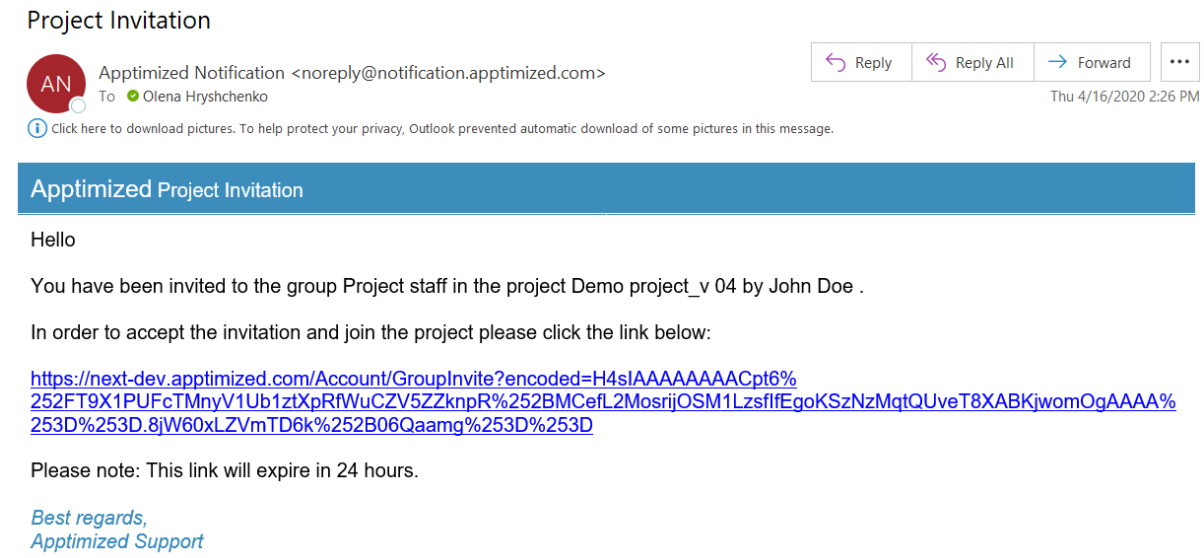
Apptimized shows the following notifications and screen when successful:



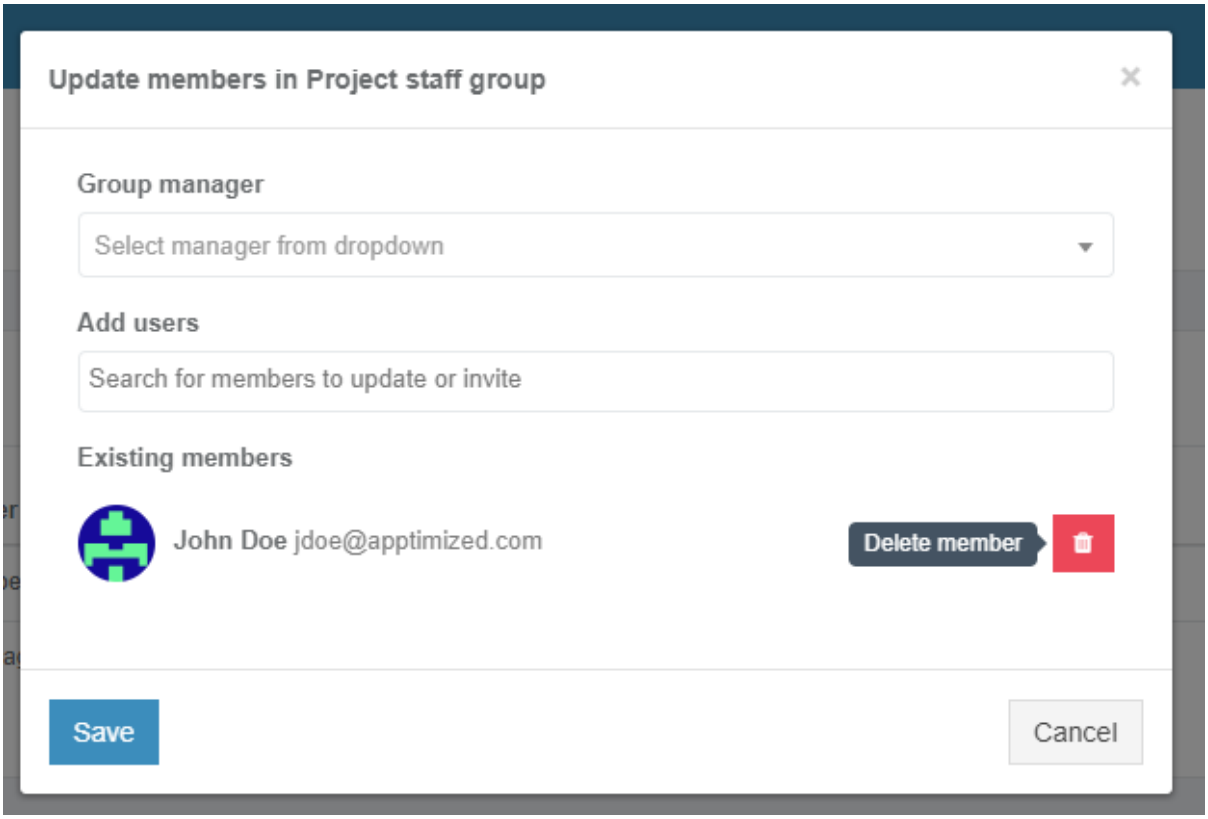
If the person does not have an Apptimized account, the Email address will not appear in the drop-down menu. The option to invite a new user to Apptimized and to add the to-be-created user account to a group is available under the **Update members** button > **Add users** field > Enter Email > **Save**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

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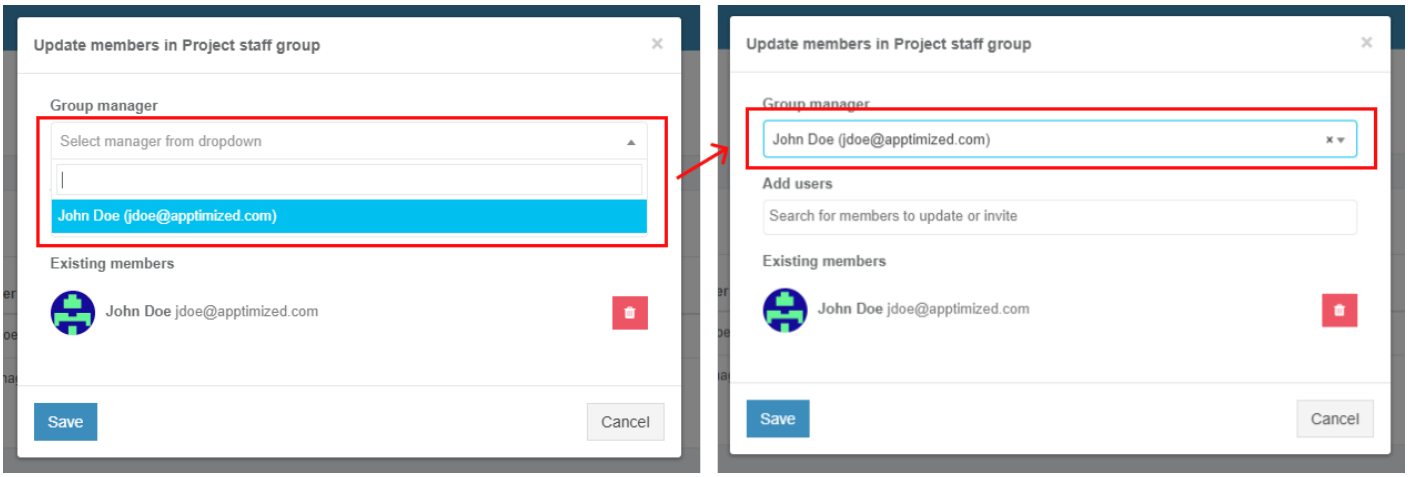




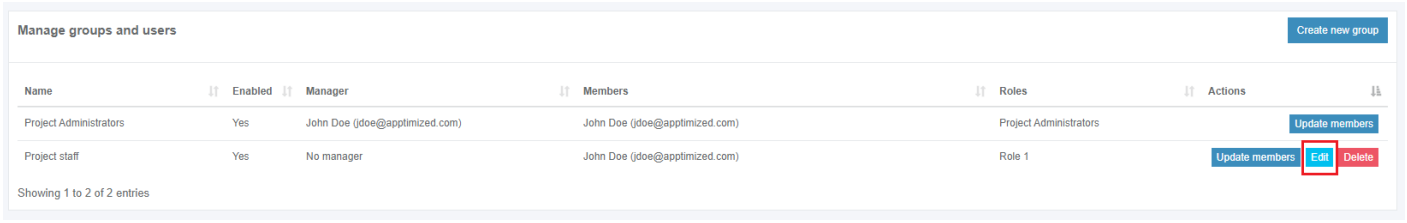
The option to delete a group member is available under the **Update members** button > **Bin** symbol in front of the user's name > **Save** button.



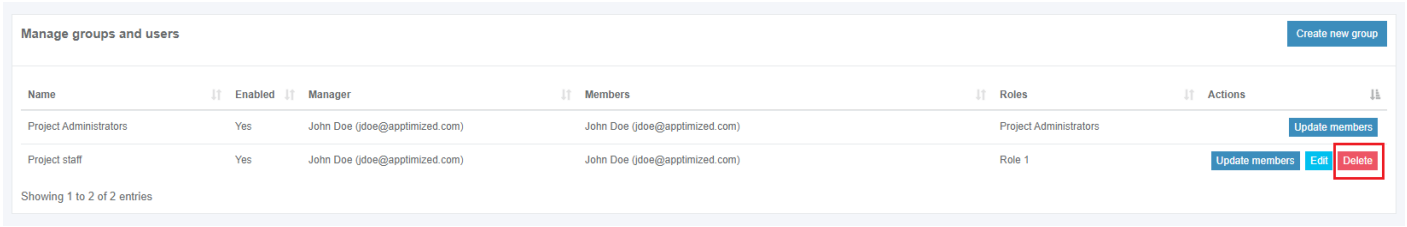
The option to set a group manager is available under the **Update members** button > **Group manager** field > Select a user from a drop-down list > **Save** button.



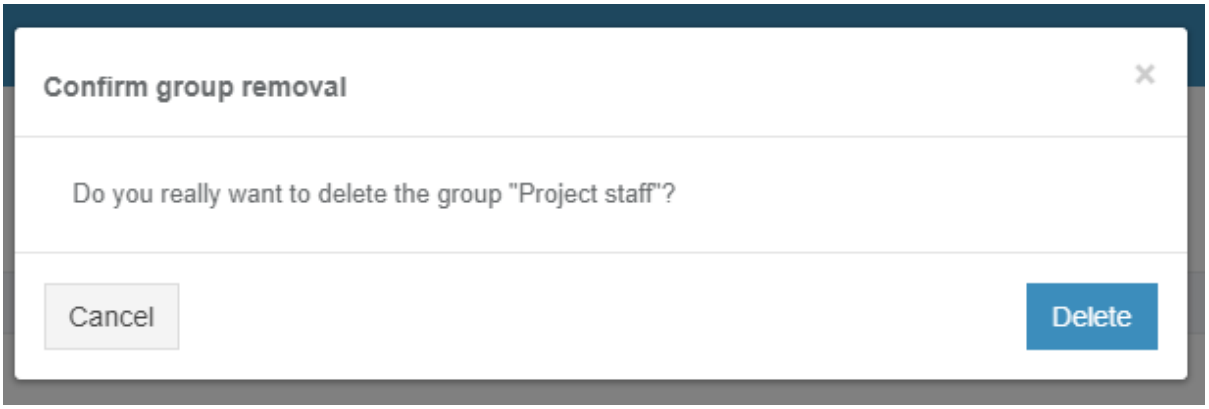
A group can be changed with the **Edit** button and by following the same set of operations as for adding a new group.



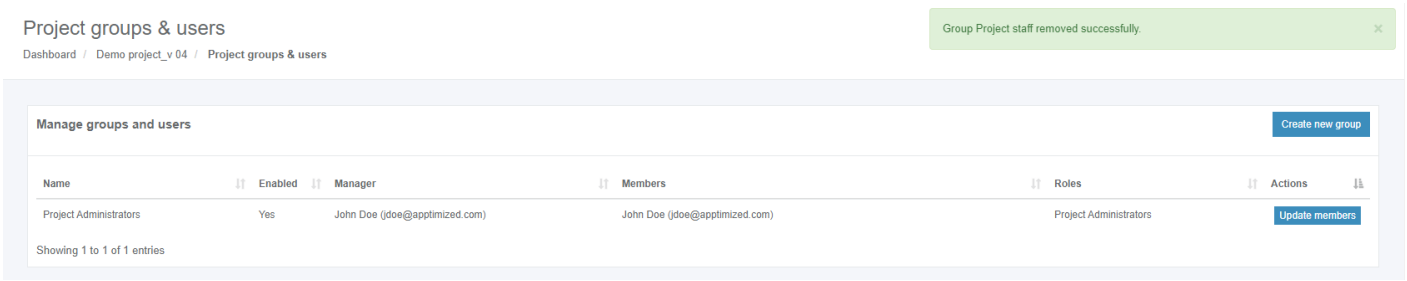
The option to delete the group is available under the **Delete** button.



Apptimized shows the following modal window:



Apptimized shows the following notification and screen when successful:



Revision #3
Created 2021-06-07 07:39:11 UTC
Updated 2021-09-22 06:48:14 UTC