ADD SUBCONTRACTOR USER GROUP TO A WORKFLOW FORM INITIATED & USER GROUP ASSIGNED 1. Go to the Templates Manager for a module. Select & fill out the form 1 2. Open a form with a Form Flow. 3. Open the Form Flow tab.

ADD SUBS TO A USER GROUP WORKFLOW

4. For the Step Details question that might be worded similar to "Who will be responsible for this step" select User Group.

Form Flow - SUB user group test Step 2 Sten details STEPS Step 2 2 DAYS Step 3 (Final Ster Actions Stan accas Button detail

Click the **Publish** icon. 5.

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2. At the portion of the form flow where a user group was assigned, select the appropriate user group, and click Save.

	Send to subcontractor	to do the work	×	
Date	Choose a user group resp	onsible for this step	- 8	
	Geneso 2		•	
			3	
xplain what the issue is		Cancel	Save	

A notification is then sent to all users of that group, and that event appears in their All Events screen.

Safety > Events •										Global Events/Tasks View			My vi	ew		
Ge ⊗ ▼									🕑 Edit pr	operti	1	-				
	Event title	0	Event date		Category	Ŧ	Event ID	Ŧ	Form name	Project/Organization	Reporter	-	Status			R
	Form Flow - SUB user group		03-23-2023		Subcontractor Issue		2023032300004		Form Flow - SUB user group	Steel Structure Training Job	Karen Loftus		Pendir	ng		
	Form Flow - SUB user group		03-23-2023		Subcontractor Issue		2023032300003		Form Flow - SUB user group	Steel Structure Training Job	Karen Loftus		Initial	Submission		
	Form Flow - SUB user group		03-23-2023		Subcontractor Issue		2023032300002		Form Flow - SUB user group	Steel Structure Training Job	Karen Loftus		Cancel	led		
	warehouse issue		03-23-2023		Subcontractor Issue		2023032300001		Issue	Steel Structure Training Job	Karen Loftus		Pendir	g		