QUICK GUIDE CREATE USER GROUPS



CREATE A SUBCONTRACTOR USER GROUP

By assigning members to user groups, your subs can see events even if they're outside of their current user assignments.

- 1. Select a project.
- 2. Click on Settings.
- 3. Select an SQC product.
 - A. If using Compliance, click on **Settings > Compliance > Module Settings**.
 - B. If using Completions, click on **Settings > Completions > Module Settings**.
- 4. Select a Module tile.
- 5. Click Project Settings.
- 6. Turn the User Groups toggle **On**, then click on \rightarrow **Open User Group**.

User Groups

Enabling user groups for the project will allow user groups to be created and managed as well as associated with desired events/tasks.

- 7. Click Create User Group.
- 8. Complete all fields in the Create User Group pop-up.
- 9. Click Save.

NOTE: Only those users with access to the specific project in Module Settings > User Assignments, will appear as options.

ASSIGN USER GROUP MEMBERS THEIR ASSIGNMENTS

For proper collaboration, it's vital that users see all the events and tasks that are assigned to categories they are assigned to.

- 1. From within the chosen SQC module's Module Summary, select the **User Assignments** tab.
- 2. Search for and locate an individual.
- 3. Click on their hyperlinked name to open the record.
- 4. Click the Add Assignments icon.
- 5. Be specific in selecting the appropriate organizations or projects.
- 6. Click Next.
- 7. Check the appropriate Categories.
- 8. Click Next.
- 9. Select the appropriate Role(s).
- 10. Click Done.
- 11. Repeat as needed.
- 12. Click Close.

PROVIDE VISIBILITY OF EVENTS OR TASKS TO SUBS

Providing visibility to events or tasks is easy to accomplish if a sub simply needs access to see a particular event outside of their current user assignments.

- 1. In the module where you previously set up a User Group, open a published form or task.
- 2. Select the **User Groups** icon.
- 3. Select the user group(s) to assign.
- 4. Click the X to close.
- 5. Add required content.
- 6. Click Save & Close.

As a result, this event or task will now appear in the subs All Events or All Tasks register, even if the sub isn't assigned to that category.

NOTE: No programmatic notification is sent in this situation.