



QUICK GUIDE

ADD SUBS TO A USER GROUP WORKFLOW

ADD SUBCONTRACTOR USER GROUP TO A WORKFLOW

1. Go to the Templates Manager for a module.
2. Open a form with a Form Flow.
3. Open the Form Flow tab.
4. For the Step Details question that might be worded similar to “Who will be responsible for this step” select **User Group**.

5. Click the **Publish** icon.

FORM INITIATED & USER GROUP ASSIGNED

1. Select & fill out the form.
2. At the portion of the form flow where a user group was assigned, select the appropriate user group, and click **Save**.

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

Event title	Event date	Category	Event ID	Form name	Project/Organization	Reporter	Status
Form Flow - SUB user group	03-23-2023	Subcontractor Issue	2023032300004	Form Flow - SUB user group	Steel Structure Training Job	Karen Loftus	Pending
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	Cancelled
warehouse issue	03-23-2023	Subcontractor Issue	2023032300001	Issue	Steel Structure Training Job	Karen Loftus	Pending

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