CREATE USER GROUPS
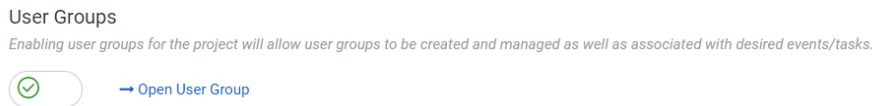
CREATE A SUBCONTRACTOR USER GROUP

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 ➔ **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.

➔ Open User Group

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.