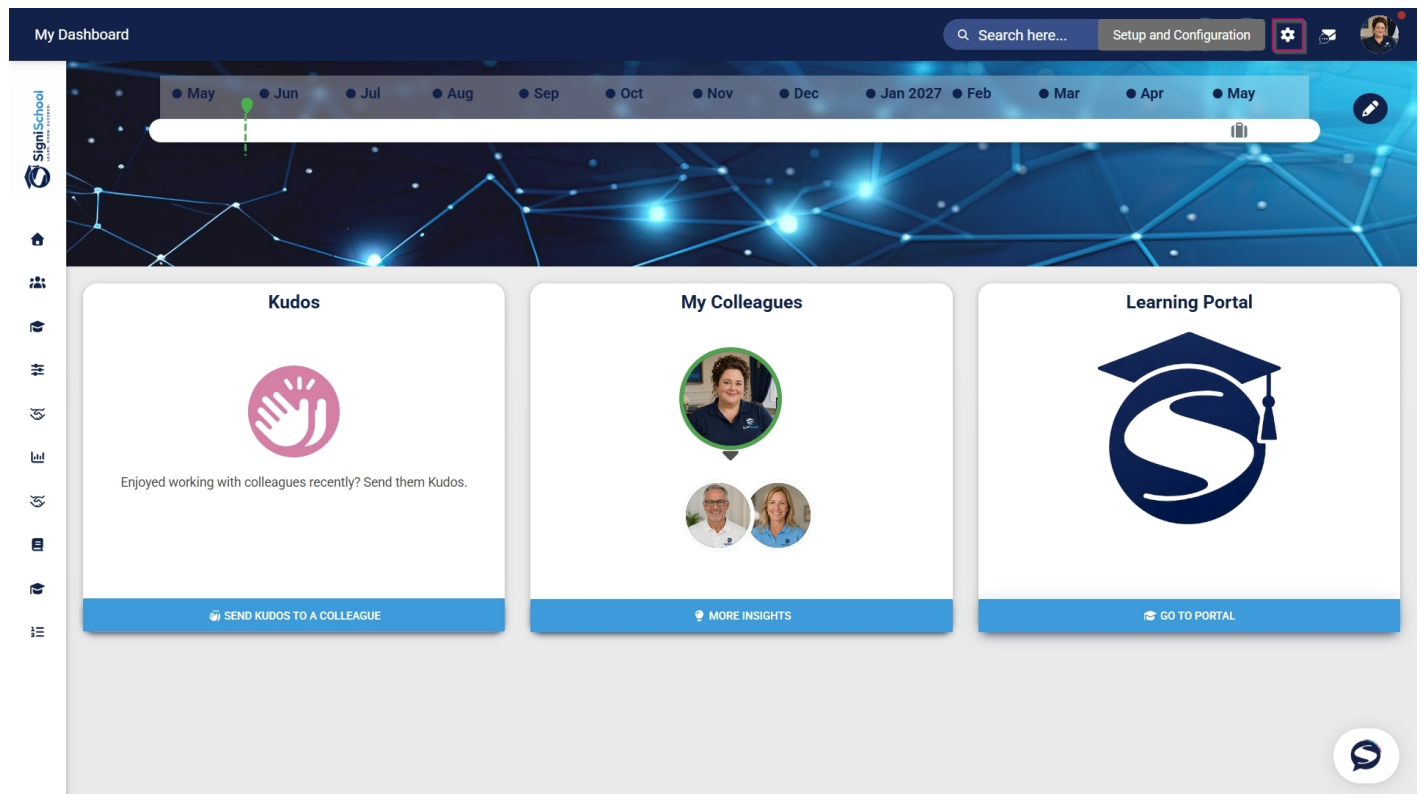


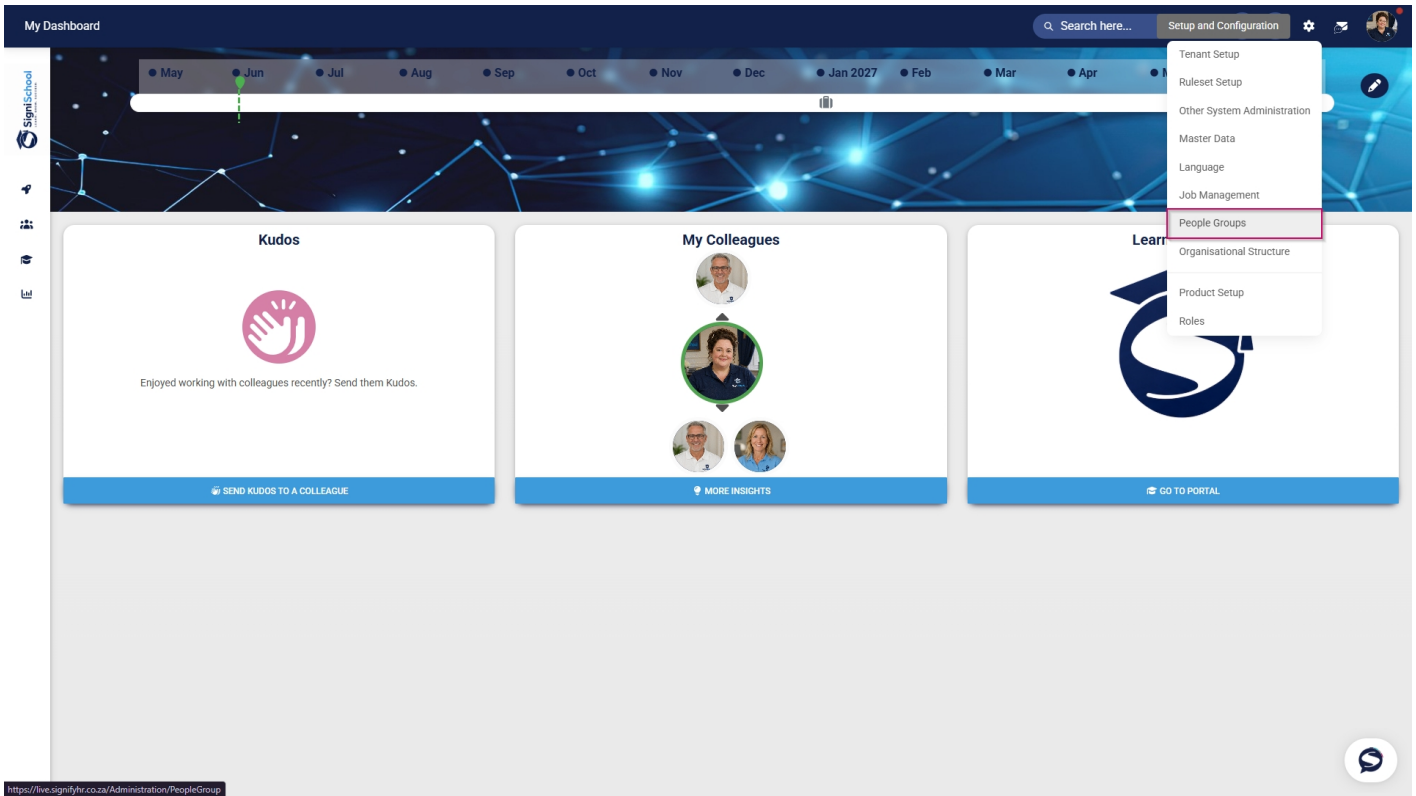
Create a People Group

Create people groups

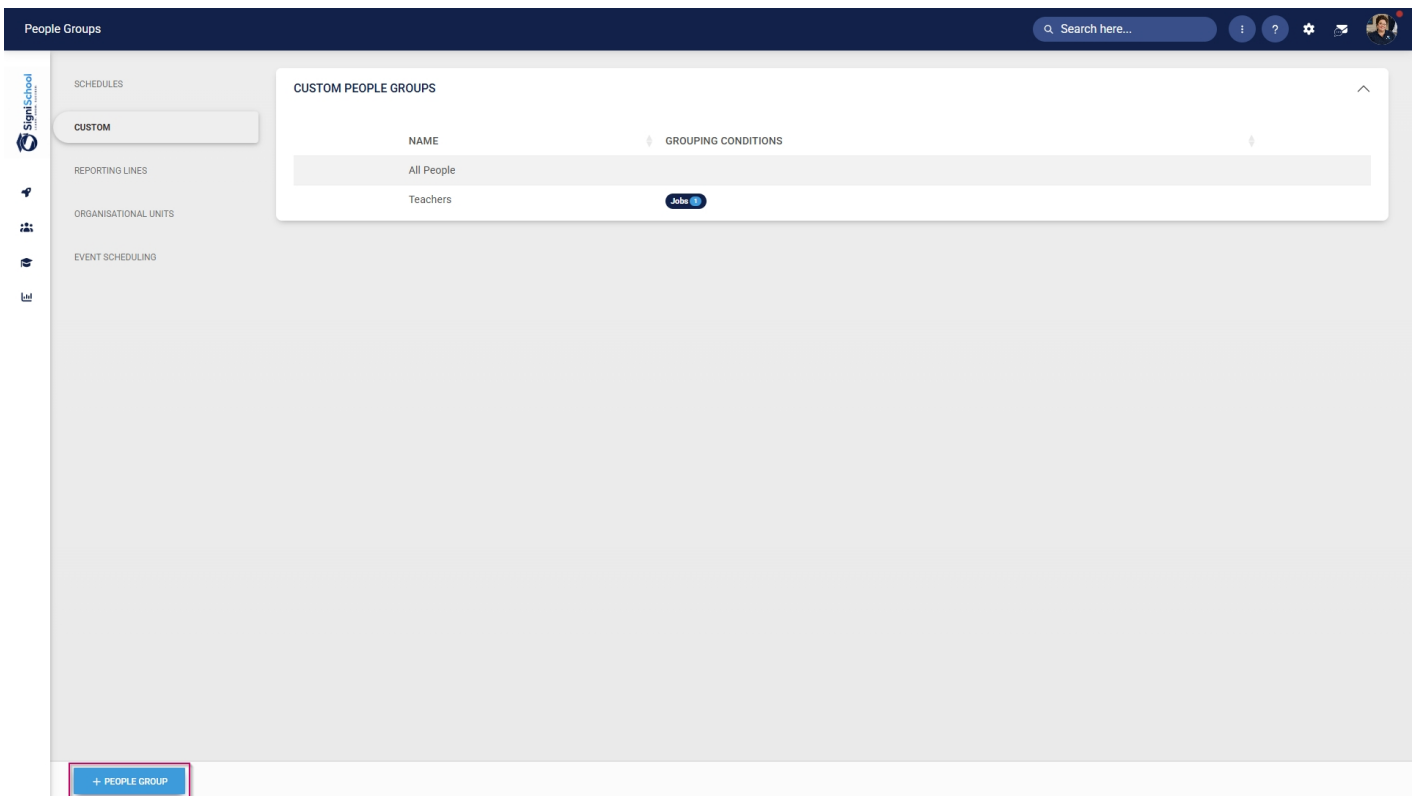
- Click the **gear icon** to access the **Setup and Configuration** menu.



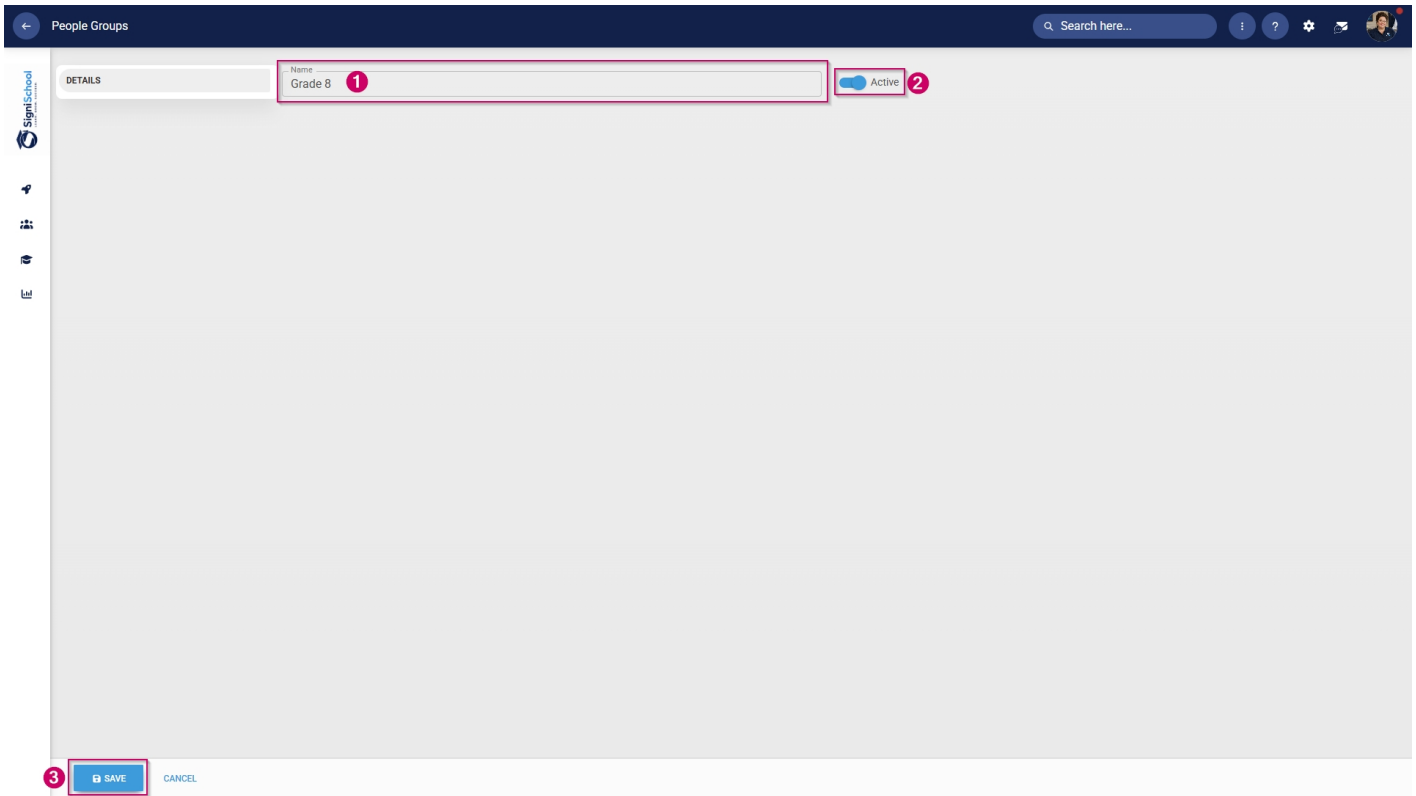
- Click **People Groups**.



- In the **left-hand menu**, navigate to **Custom**, then click **+PEOPLE GROUP**.



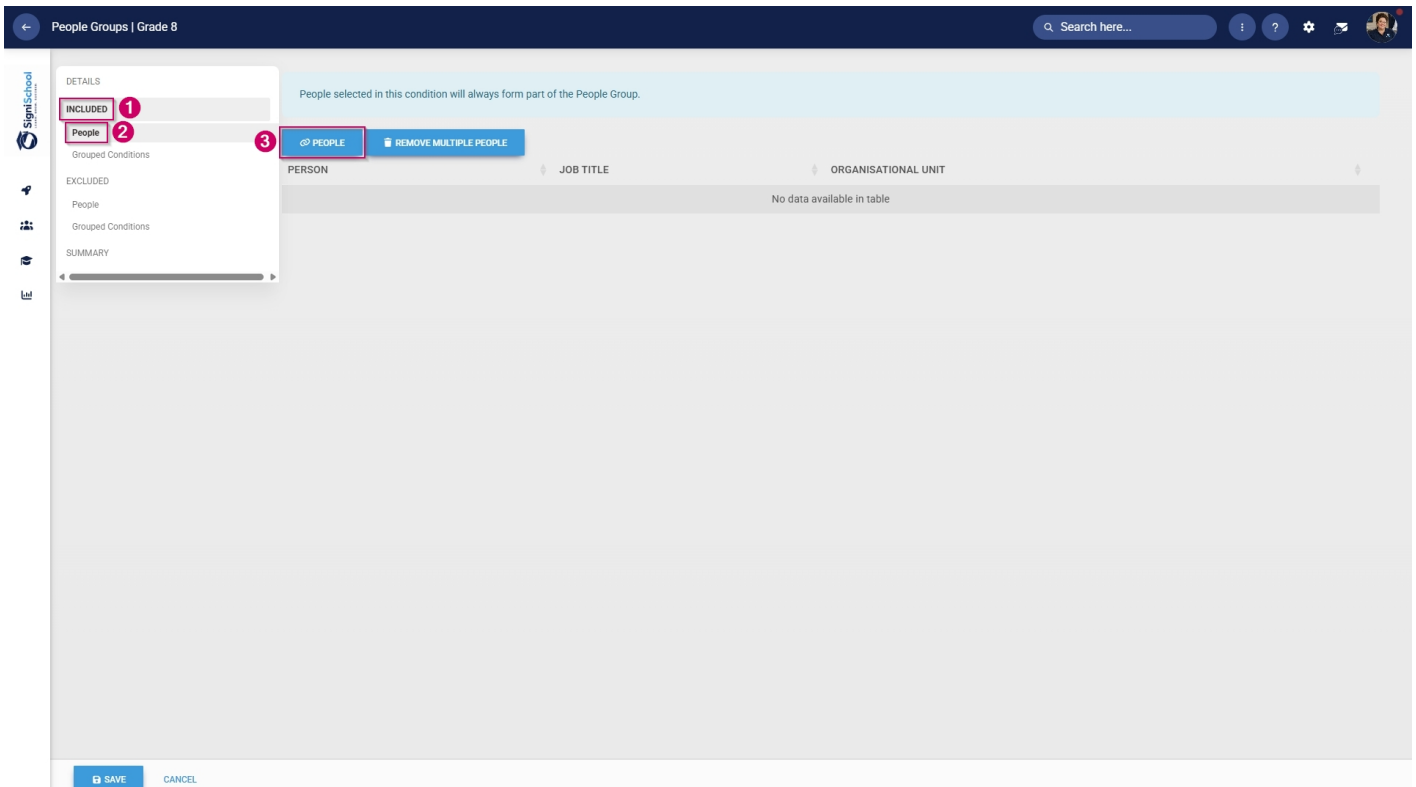
- Enter a descriptive name for the people group.
- Click the **toggle button** to set the status to **Active**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



- Once the people group has been created, you can select the people to add to it.

Included: Individuals

- In the **left-hand menu**, click to navigate to the **Included** section, then click **People** to add individuals.
- Click the **PEOPLE** button.



- Use the **search bar** to find a person based on their name, surname, username, or job title.
- Tick the **checkbox** to select a person.

Select People from the list

Q student 1

SELECT	PERSON	JOB TITLE	ORGANISATIONAL UNIT
<input type="checkbox"/>	Emily Cowen(0002)	Student Counsellor	SigniSchool Online School SigniSchool Administration
<input checked="" type="checkbox"/> 2	Quinton de Jongh(0035)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Melinda Louber(0034)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Mark Wilson(0033)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Lunga Mukenge(0032)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Lauren Michelle Hudson(0031)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Kimberly-Ann Strydom(0030)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Kelsey Bleeker(0029)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Jessica Fung(0028)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Jesse Potgieter(0027)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Cherie Ghelani(0017)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Ben Oosthuizen(0016)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Andrew O'Leary(0015)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Alexander Wilcocks(0014)	Student	SigniSchool Online School SigniSchool Students

- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

People Groups | Grade 8

DETAILS

INCLUDED

People

Grouped Conditions

EXCLUDED

People

Grouped Conditions

SUMMARY

<input type="checkbox"/>	Lauren Michelle Hudson(0031)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Kimberly-Ann Strydom(0030)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Kelsey Bleeker(0029)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Jessica Fung(0028)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Jesse Potgieter(0027)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Cherie Ghelani(0017)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Ben Oosthuizen(0016)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Andrew O'Leary(0015)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Alexander Wilcocks(0014)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Aleah Mphoko(0013)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Zoey Price(0043)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Yeoman Fung(0042)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Wilbur Everton(0041)	Student	SigniSchool Online School SigniSchool Students
<input type="checkbox"/>	Unami Kombani(0040)	Student	SigniSchool Online School SigniSchool Students
<input checked="" type="checkbox"/>	Sashin Sangakara(0039)	Student	SigniSchool Online School SigniSchool Students

First Previous 1 2 Next Last

CANCEL **SAVE**

- Review the users added to your people group, then click **SAVE** when you are finished or click **CANCEL** to discard your edits.

People selected in this condition will always form part of the People Group.

PERSON	JOB TITLE	ORGANISATIONAL UNIT
Quinton de Jongh(0035)	Student	SigniSchool Online School SigniSchool Students
Cherie Ghelani(0017)	Student	SigniSchool Online School SigniSchool Students
Andrew O'Leary(0015)	Student	SigniSchool Online School SigniSchool Students
Zoey Price(0043)	Student	SigniSchool Online School SigniSchool Students
Sashin Sangakara(0039)	Student	SigniSchool Online School SigniSchool Students
Hassim Malinga(0025)	Student	SigniSchool Online School SigniSchool Students

SAVE CANCEL

Included: Grouped conditions

- Click **Grouped Conditions** to add groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

All of the following conditions must be met before a person will be included in the People Group, for example:

- If only a Job Title has been added, then all the people appointed in that Job Title will form part of the People Group.
- If only a Job Grade has been added, then all the people in the linked positions will form part of the People Group.
- If only an Organisational Unit has been selected, only people appointed in that Organisational Unit will form part of the People Group.
- If only a Reporting Line Type has been selected, only subordinates reporting to a specified manager for the Reporting Line Type will form part of the People Group.
- If a combination of the above has been selected, people will be included when they are:
 - Appointed in the Job Title, OR who are also
 - Appointed in a Job Title with the selected Job Grade, OR who are also
 - Appointed in the Organisational Unit, OR who are also
 - Reporting to the specified manager for the Reporting Line Type

JOBS

CODE	JOB	TOTAL LINKED POSITIONS
No data available in table		

JOB GRADES

JOB GRADE	TOTAL LINKED POSITIONS
No data available in table	

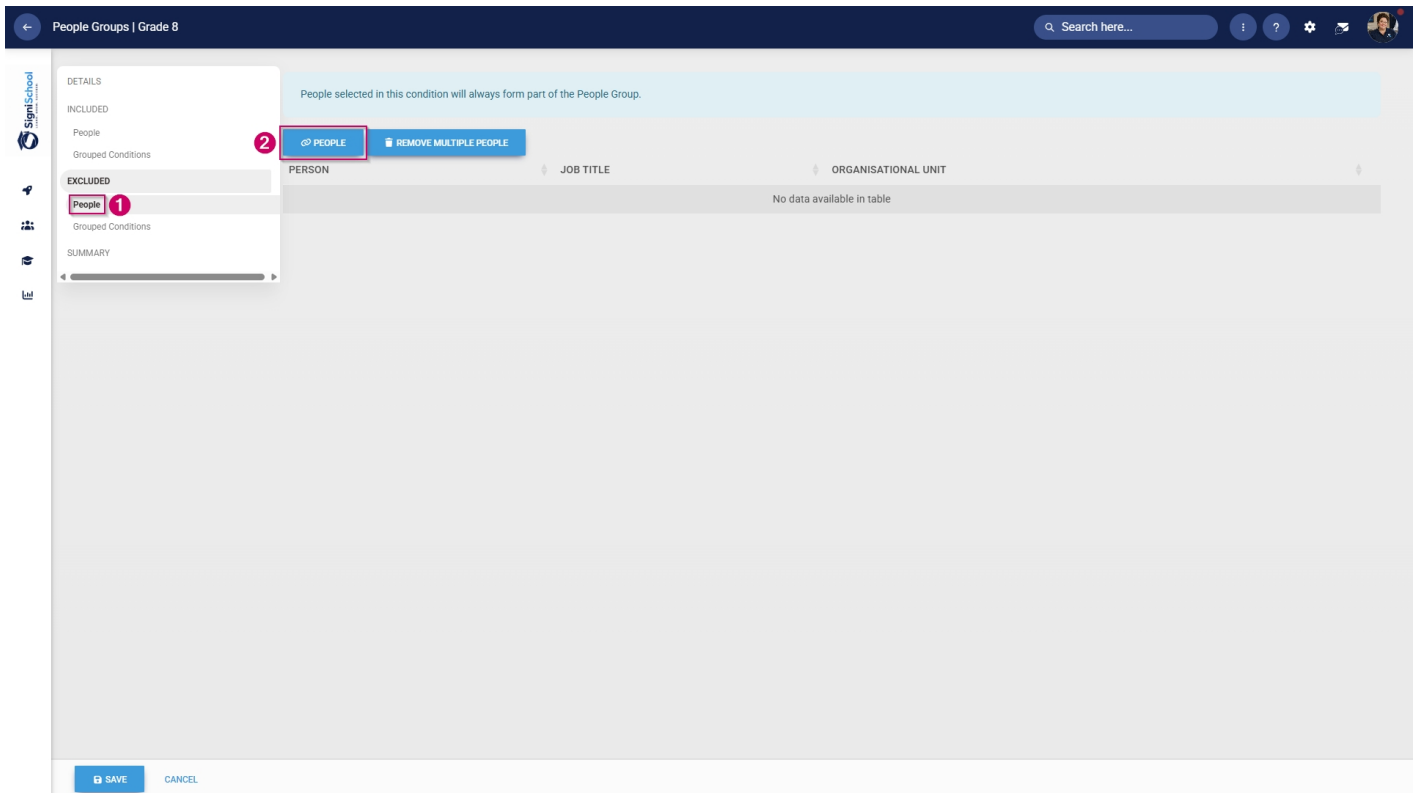
ORGANISATIONAL UNITS

CODE	NAME	ORGANISATIONAL LEVEL TYPE	ORGANISATIONAL UNIT	TOTAL LINKED POSITIONS
------	------	---------------------------	---------------------	------------------------

SAVE CANCEL

Included: Individuals

- In the **left-hand menu**, click to navigate to **People** in the **Excluded** section.
 - Click the **PEOPLE** button.
 - Select the people you would like to exclude.
 - Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



Excluded: Grouped conditions

- Click **Grouped Conditions** to exclude groups of people based on criteria such as job titles, organisational nodes, etc.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

People Groups | Grade 8

Search here...

DETAILS

INCLUDED

People

Grouped Conditions

EXCLUDED

People

Grouped Conditions

SUMMARY

All of the following conditions must be met before a person will be included in the People Group, for example:

- If only a Job Title has been added, then all the people appointed in that Job Title will form part of the People Group.
- If only a Job Grade has been added, then all the people in the linked positions will form part of the People Group.
- If only an Organisational Unit has been selected, only people appointed in that Organisational Unit will form part of the People Group.
- If only a Reporting Line Type has been selected, only subordinates reporting to a specified manager for the Reporting Line Type will form part of the People Group.
- If a combination of the above has been selected, people will be included when they are:
 - Appointed in the Job Title, OR who are also
 - Appointed in a Job Title with the selected Job Grade, OR who are also
 - Appointed in the Organisational Unit, OR who are also
 - Reporting to the specified manager for the Reporting Line Type

JOB

CODE JOB TOTAL LINKED POSITIONS

No data available in table

JOB GRADES

JOB GRADE TOTAL LINKED POSITIONS

No data available in table

ORGANISATIONAL UNITS

CODE NAME ORGANISATIONAL LEVEL TYPE ORGANISATIONAL UNIT TOTAL LINKED POSITIONS

SAVE CANCEL

Summary

- In the **left-hand menu**, click Summary to view all the users included in your people group.

People Groups | Grade 8

Search here...

DETAILS

INCLUDED

People

Grouped Conditions

EXCLUDED

People

Grouped Conditions

SUMMARY

SUMMARY

PERSON	JOB TITLE	ORGANISATIONAL UNIT
Quinton de Jongh(0035)	Student	SigniSchool Online School SigniSchool Students
Cherie Ghelani(0017)	Student	SigniSchool Online School SigniSchool Students
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Zoey Price(0043)	Student	SigniSchool Online School SigniSchool Students
Sashin Sangakara(0039)	Student	SigniSchool Online School SigniSchool Students
Hassim Malinga(0025)	Student	SigniSchool Online School SigniSchool Students

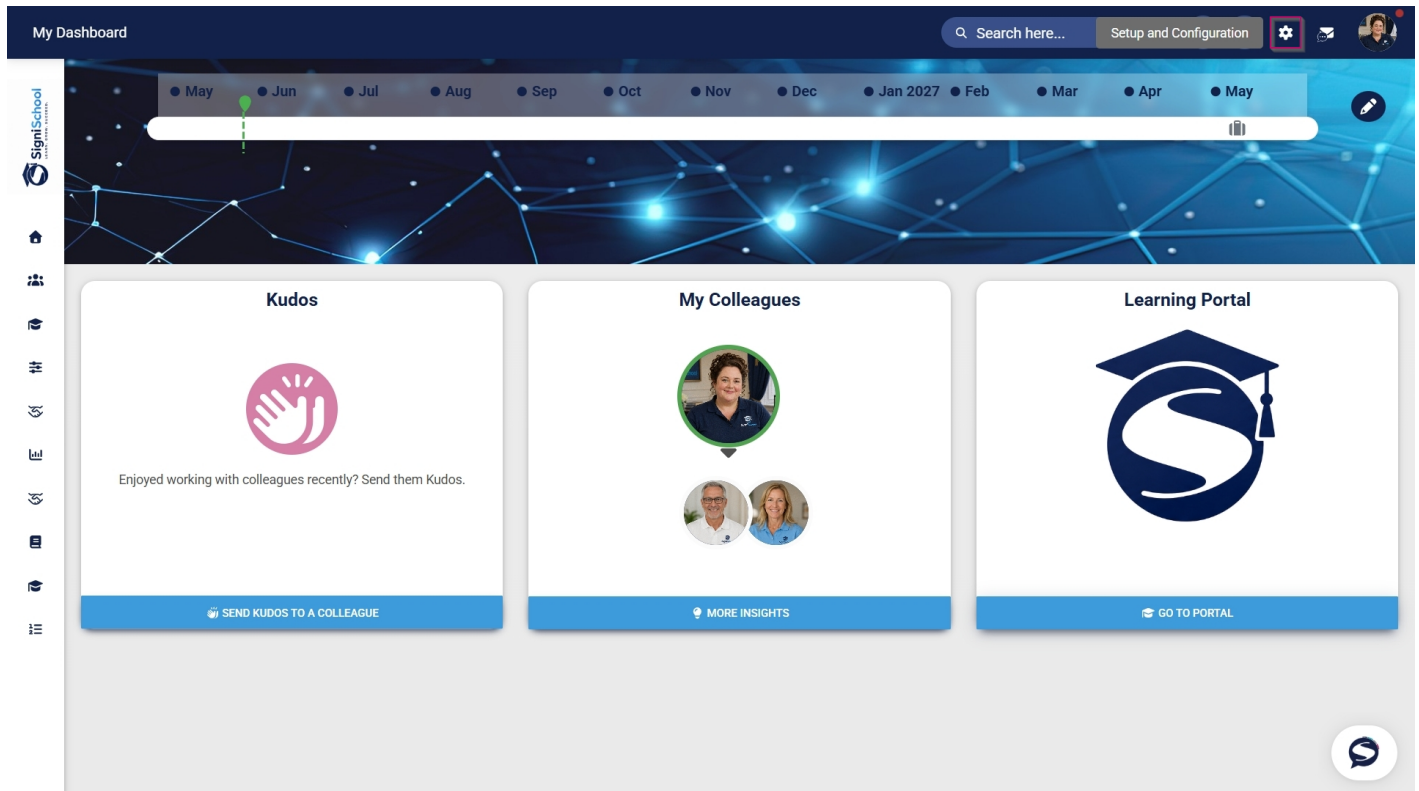
REFRESH PEOPLE GROUP USERS

SAVE CANCEL

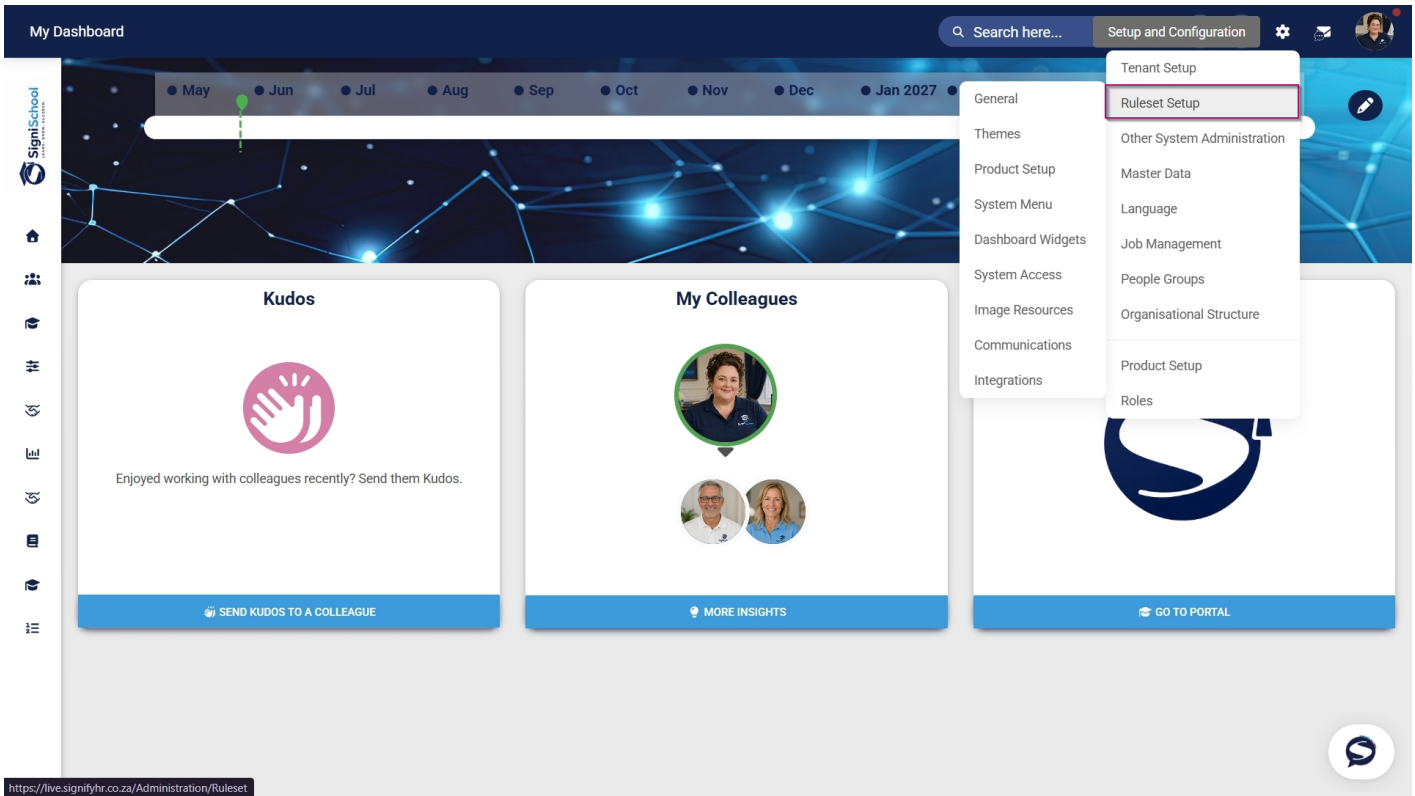
- “ The people groups take some time to synchronise on the system once they're created. This can take anywhere from **10 minutes to 12 hours**, depending on the number of changes.
- To synchronise the newly-created or updated people groups manually, follow the steps in the next section.

Manually syncing people groups

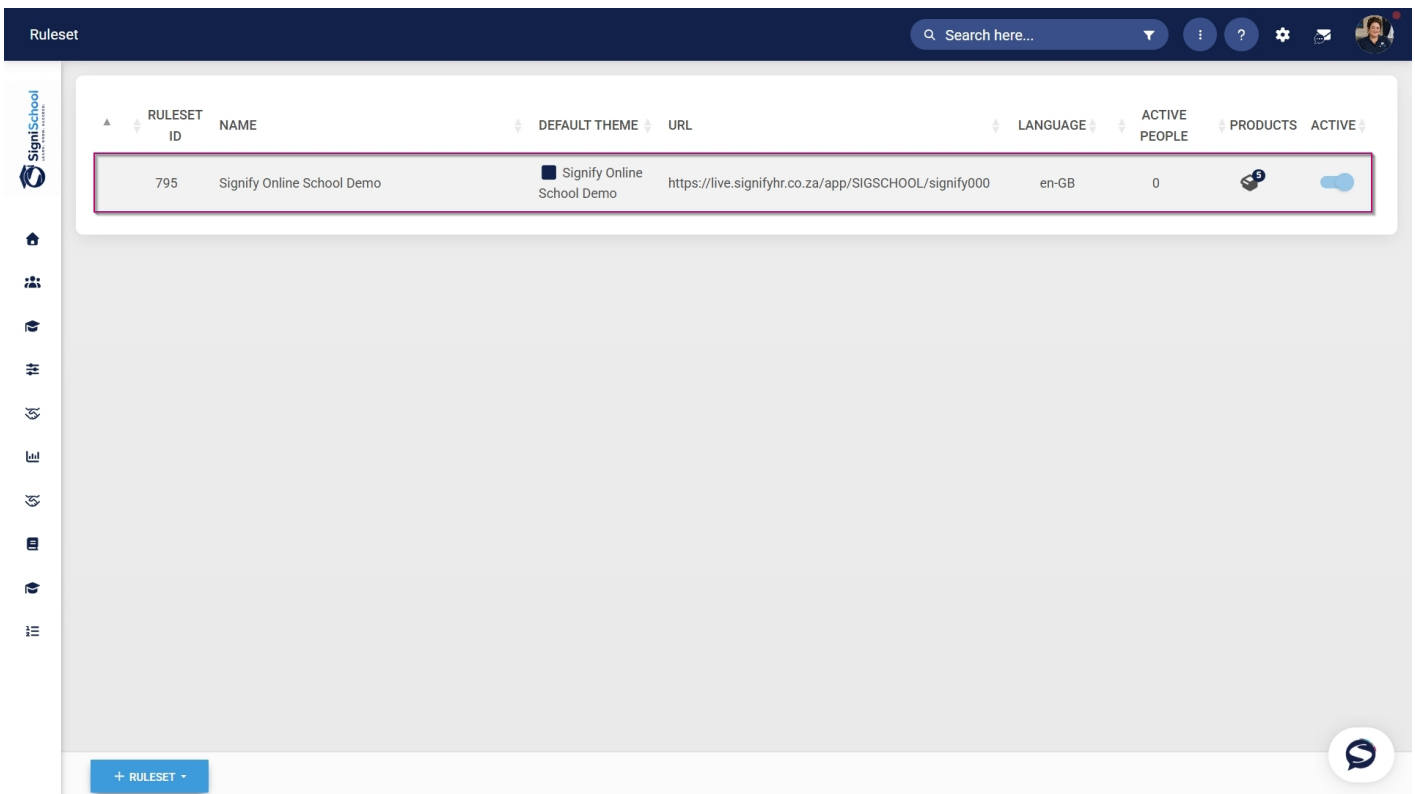
- Click the **gear icon** to access the **Setup and Configuration** menu.



- Click **Ruleset Setup**.



- Select the **ruleset** you would like to update.



- Navigate to the **Integrations** tab.

The screenshot shows the 'Integrations' page in the Signify Online School Demo. The 'GENERAL' tab is selected, and the 'Import Settings' section is visible. It includes a text input for 'Org Chart Root URL' and three toggle switches for 'Employee Code', 'ID Number', and 'External Id/ Payroll ID'. Below this is the 'CHAT BOTS' section, which contains a large text area with JavaScript code for a chatbot integration. At the bottom of the page, there are 'SAVE' and 'CANCEL' buttons.

- Scroll down to the **Bulk Additional Service Imports - Push** section.
- For the **People group import** function, you have two options when synchronising manually:
 - ◦ Click **REQUEST ALL DATA** to synchronise all the people groups.
 - ◦ This is a **time-consuming** operation because all the people groups' data is overwritten and synchronised from scratch.

Please be very careful when selecting this option, as it can affect system performance and speed, particularly during business hours.

- ◦ ◦ Click **REQUEST RECENT CHANGES** to synchronise only recent changes to your people groups.
 - ◦ This is a **time-efficient** option because only the changes are synchronised, and the previous data remains unchanged.

Ruleset | Signify Online School Demo

Search here...

GENERAL THEMES PRODUCTS SYSTEM MENU DASHBOARD WIDGETS SYSTEM ACCESS COMMUNICATIONS IMAGE RESOURCES INTEGRATIONS

GENERAL

CONTENT SERVER

PAYROLL

GENERAL

CHAT BOTS

BULK ADDITIONAL SERVICE IMPORTS - PUSH

Please note: schedules below are displayed in UTC time.

IMPORT REQUEST NAME	REQUEST IMPORT	SCHEDULE	LAST RAN	ACTIVE
User import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Every 12 hours at 00:00	2026-06-02 00:00:04Z	✓
Reporting line import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓
People group import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓
User people group permission import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:04Z	✓
User role import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:04Z	✓
Job Structure import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓

SAVE CANCEL

- Once you have selected a synchronisation method, a **message** will appear stating that the import has been requested. You can monitor the synchronisation progress by navigating to your **System Inbox**.

Ruleset | Signify Online School Demo

Search here...

GENERAL THEMES PRODUCTS SYSTEM MENU DASHBOARD WIDGETS SYSTEM ACCESS COMMUNICATIONS IMAGE RESOURCES INTEGRATIONS

GENERAL

CONTENT SERVER

PAYROLL

GENERAL

CHAT BOTS

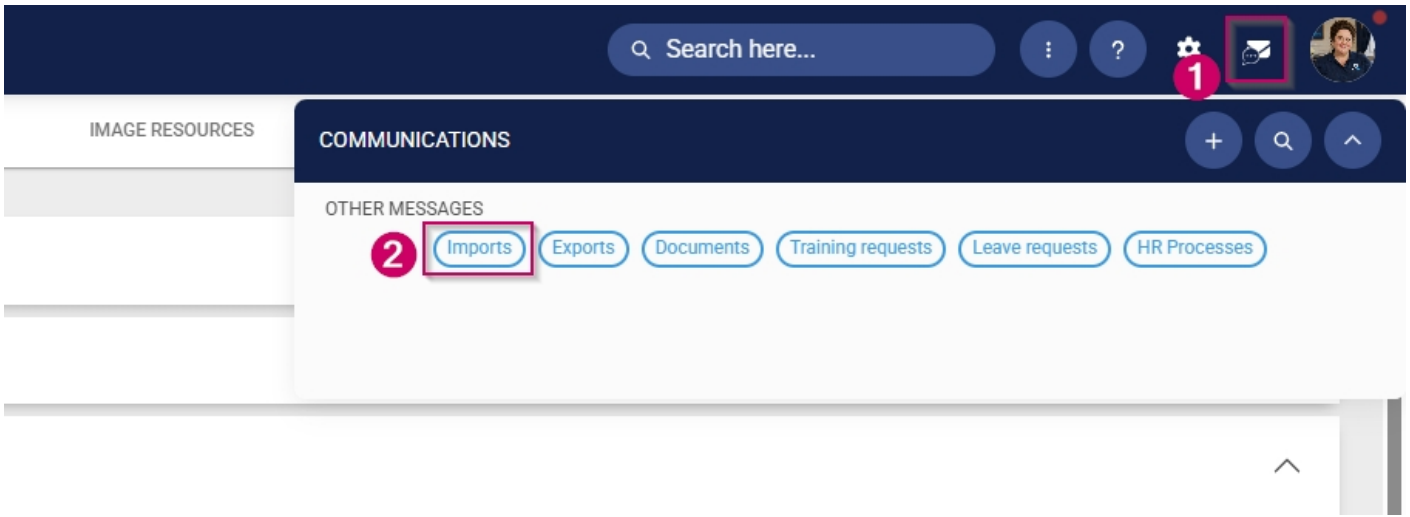
BULK ADDITIONAL SERVICE IMPORTS - PUSH

Please note: schedules below are displayed in UTC time.

IMPORT REQUEST NAME	REQUEST IMPORT	SCHEDULE	LAST RAN	ACTIVE
User import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Every 12 hours at 00:00	2026-06-02 00:00:04Z	✓
Reporting line import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓
People group import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓
User people group permission import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:04Z	✓
User role import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:04Z	✓
Job Structure import	<input type="button" value="REQUEST ALL DATA"/> <input type="button" value="REQUEST RECENT CHANGES"/>	Daily at 00:00	2026-06-02 00:00:03Z	✓

The import has been requested on the Additional Services. The services will retrieve data from this system and import the data in bulk. This may take a while to complete. DISMISS

- Click the **envelope icon** at the top of your screen to navigate to your **System Inbox**, then click **Imports**.



- You can monitor the **status** of your **imports** and **system processes** here:
 - Staged** means the task has been added to the queue and will begin once the current tasks have been completed.
 - Started** means the task is currently running.
 - Completed with Errors** means the task has been completed, although only partially, due to detected errors.
 - Completed** means the task has been successfully executed.
 - Failed** means the task could not be completed.

Notifications

EXPORTS	IMPORTS	DOCUMENTS	TRAINING REQUESTS	LEAVE REQUESTS	HR PROCESSES
USERNAME			TYPE		STATUS
⋮	AdditionalServiceImportCommand		PeopleGroupAdditionalService		Completed
⋮	CostDescriptionImport		CostDescription		Completed
⋮	PathwayGroupImport		PathwayGroup		Completed
⋮	TrainingInterventionCostImport		TrainingInterventionCost		Completed

- For a **Completed with Errors** or **Failed** task, you can download an Excel document with a breakdown of the errors.
 - Click on the **kebab icon** next to the task.
 - Click **Export Errors**.
 - Review the errors, then re-attempt the task using the steps above.

Notifications

EXPORTS	IMPORTS	DOCUMENTS	TRAINING REQUESTS	LEAVE REQUESTS	HR PROCESSES
USERNAME					
:	AdditionalServiceImportCommand		PeopleGroupAdditionalService		Completed
1	AdditionalServiceImportCommand		MasterData		Failed
2	Export Transactions	DescriptionImport	CostDescription		Completed
	Export Errors				
:	PathwayGroupImport		PathwayGroup		Completed
:	TrainingInterventionCostImport		TrainingInterventionCost		Completed



Revision #2

Created 2025-02-03 15:19:53 UTC by Chanan Stenden

Updated 2026-06-23 10:30:47 UTC by Chanan Stenden