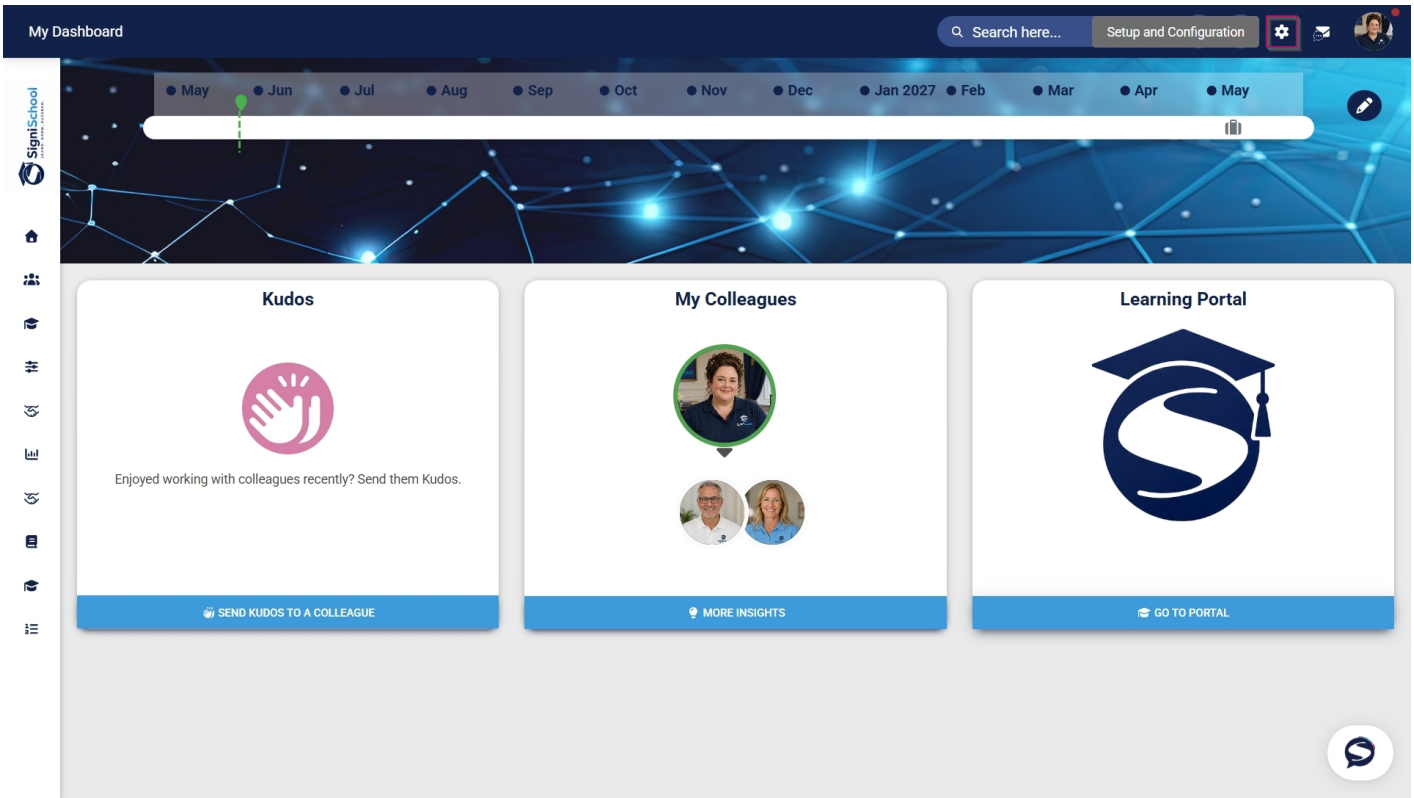
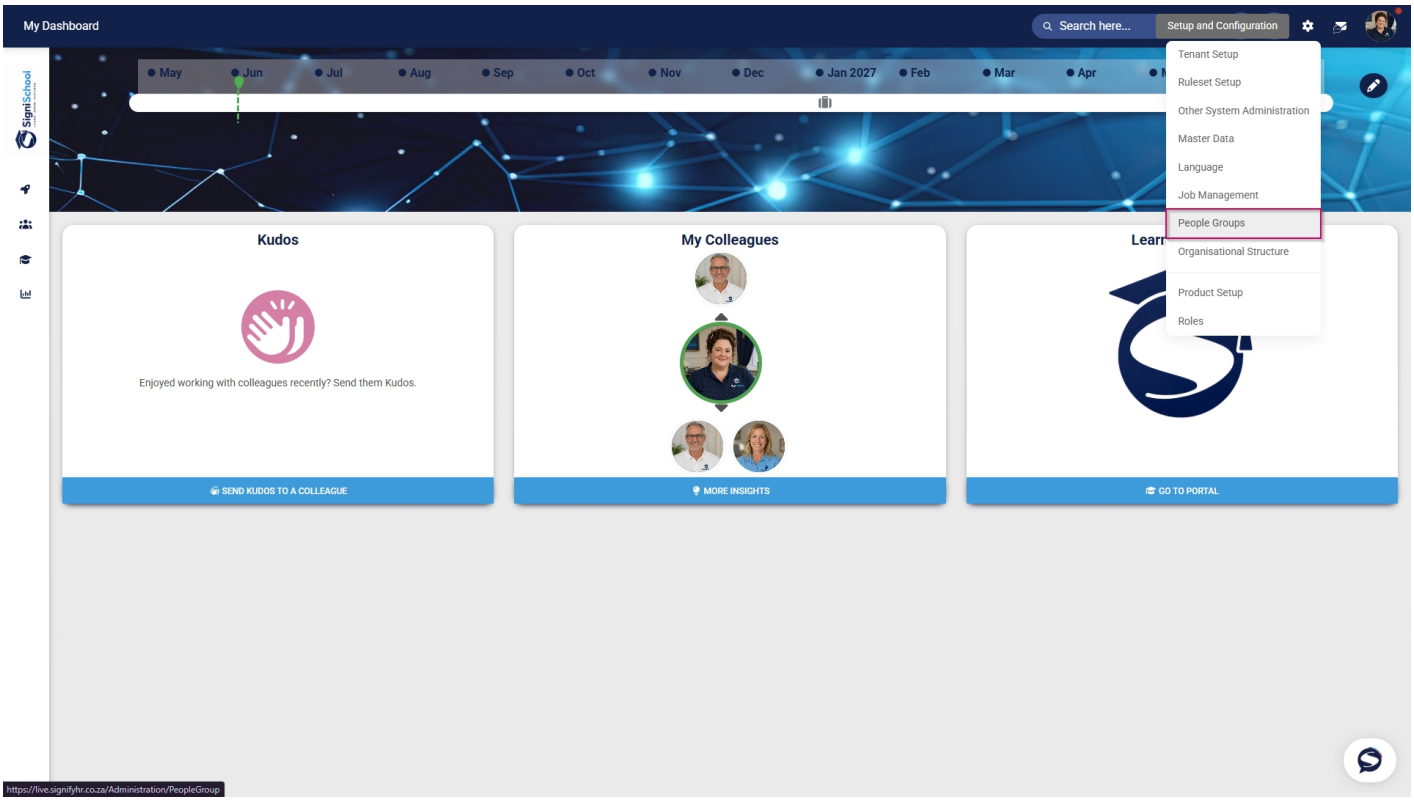
Create a People Group

Create people groups

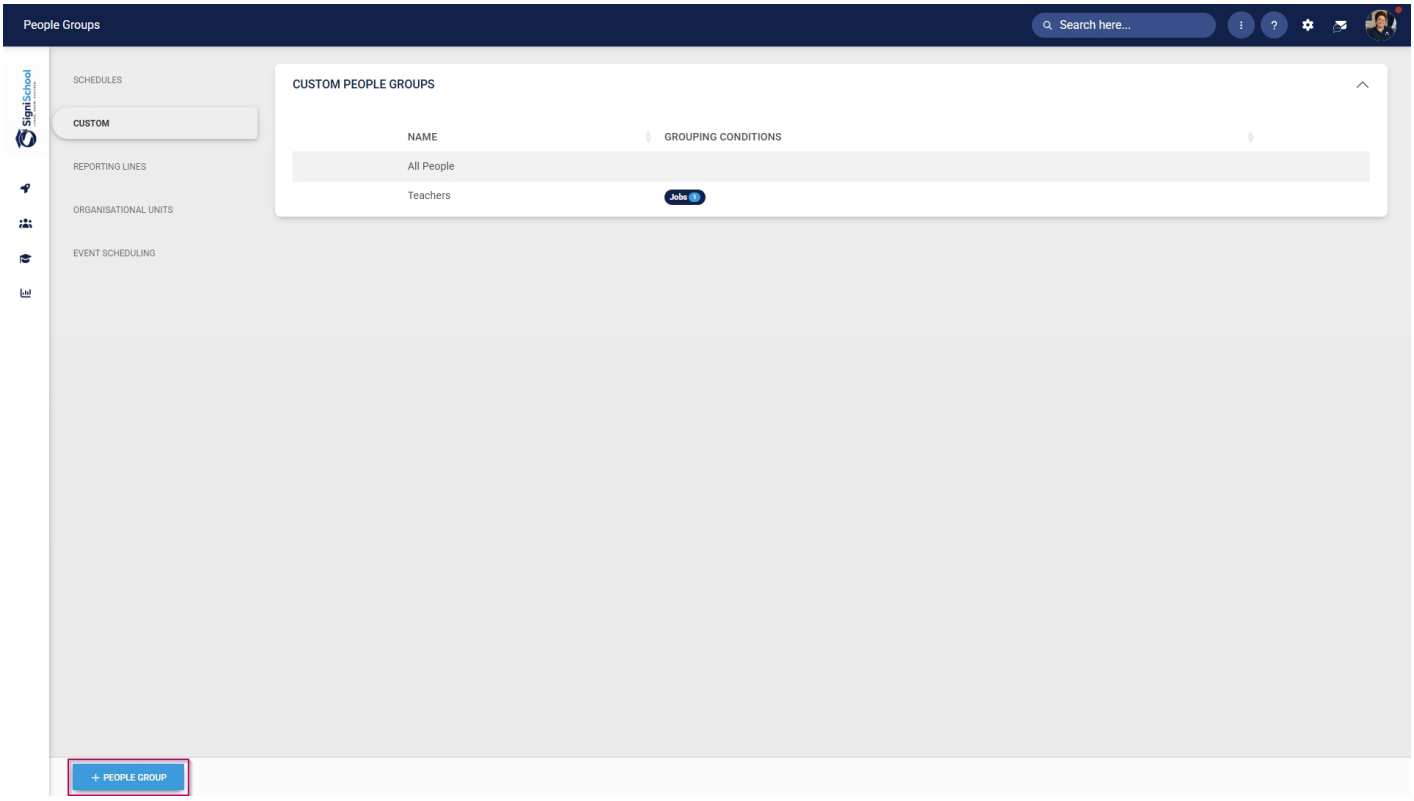
- Click the **gear icon** to access the **Setup and Configuration** menu.



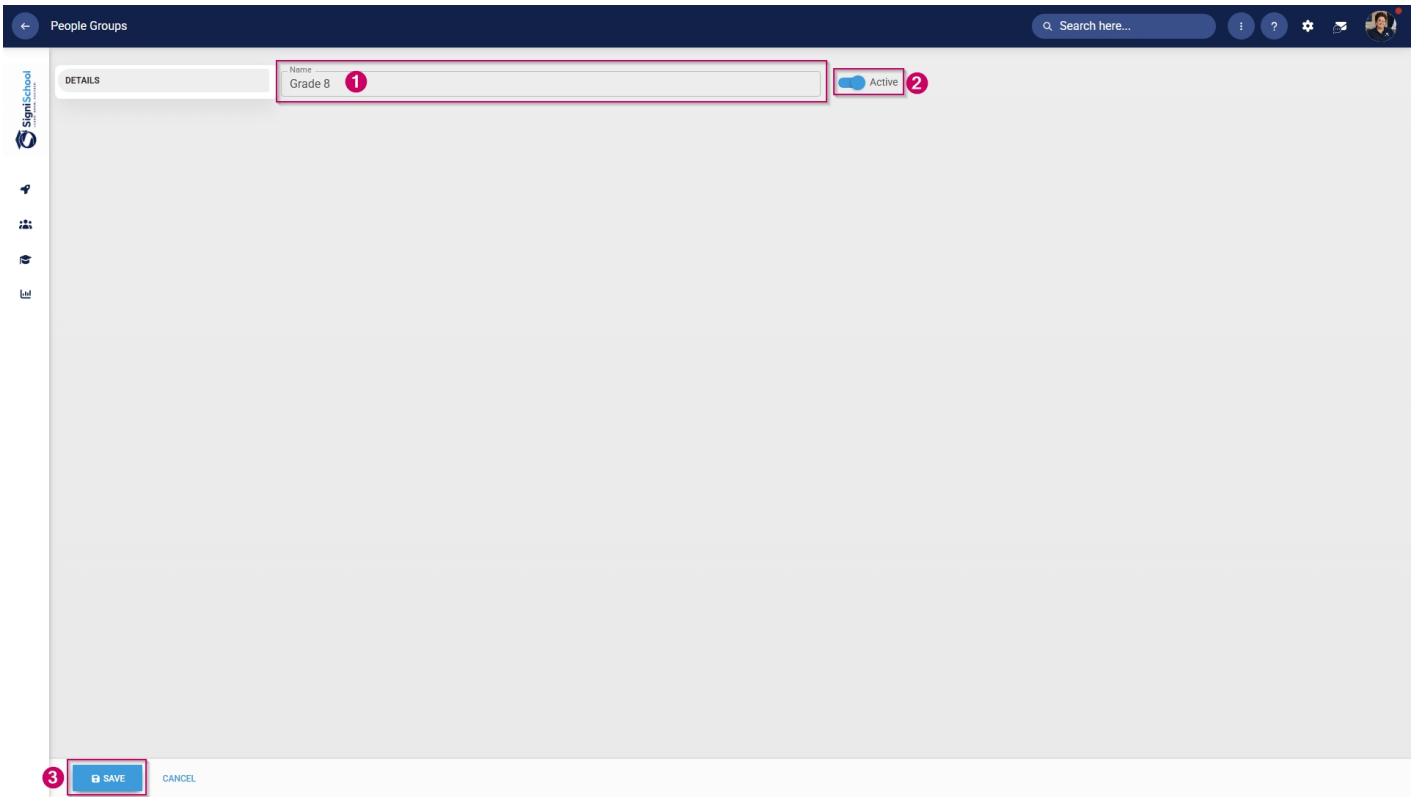
- Click **People Groups**.



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



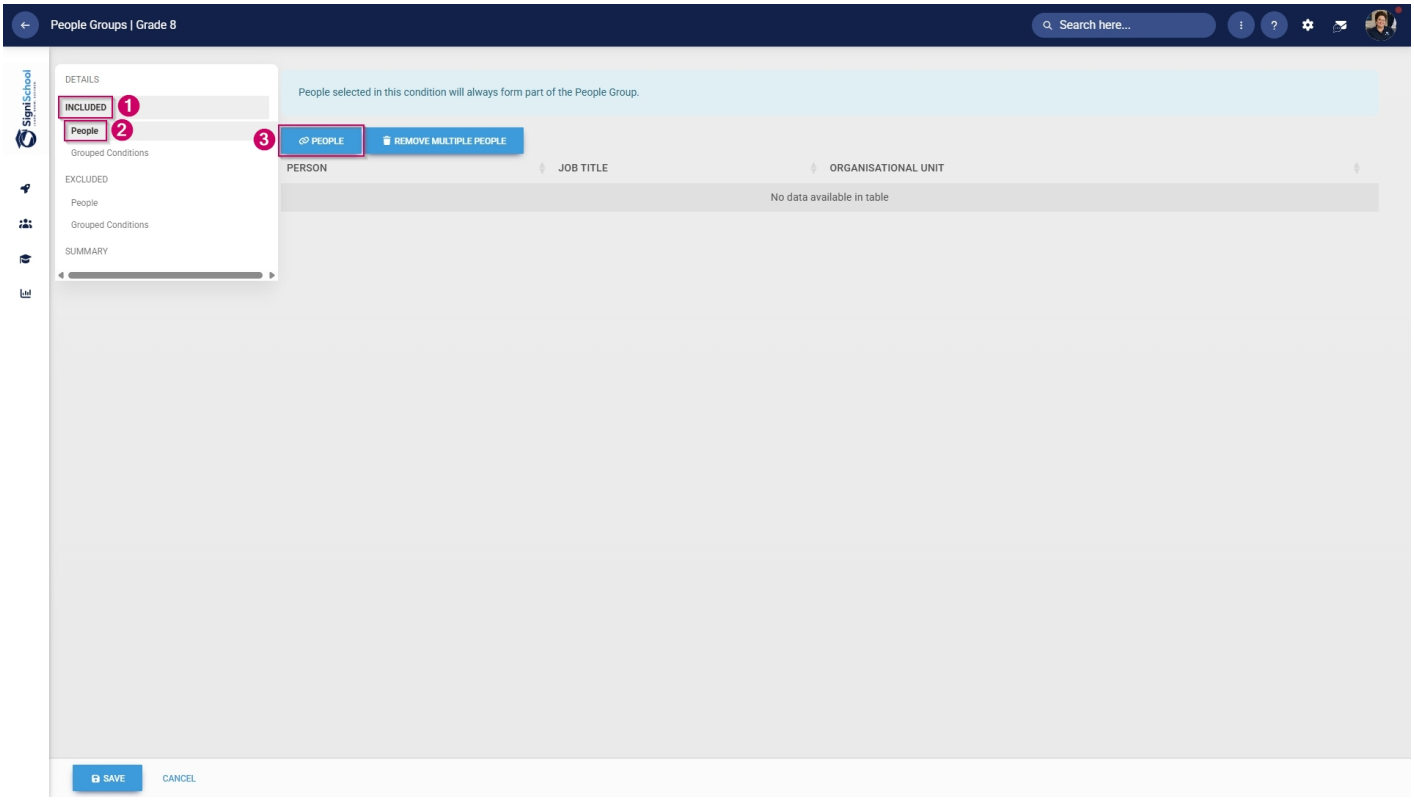
- Enter a descriptive name for the people group.
- Click the **toggle button** to set the status to **Active**.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.



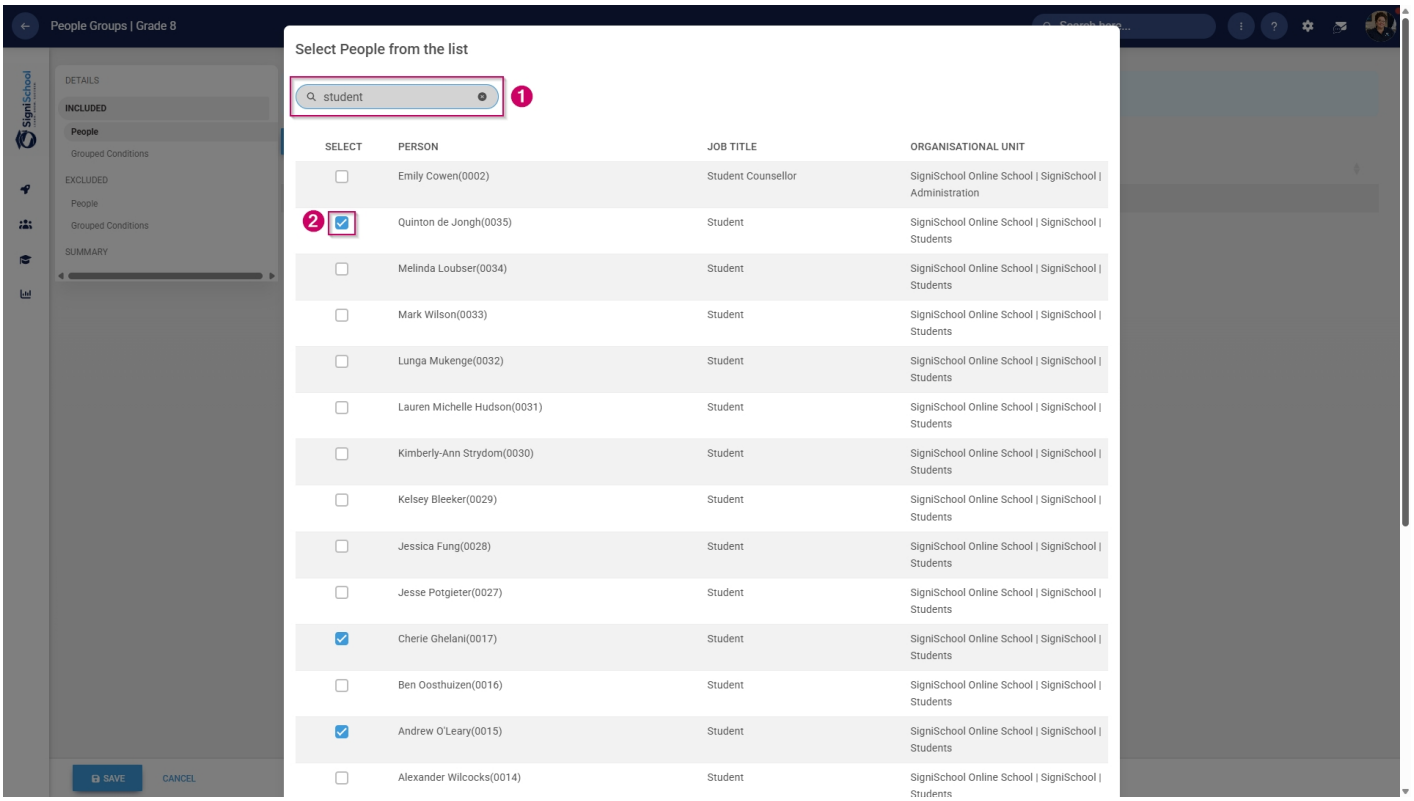
- Once the people group has been created, you can select the people to add to it.

Included: Individuals

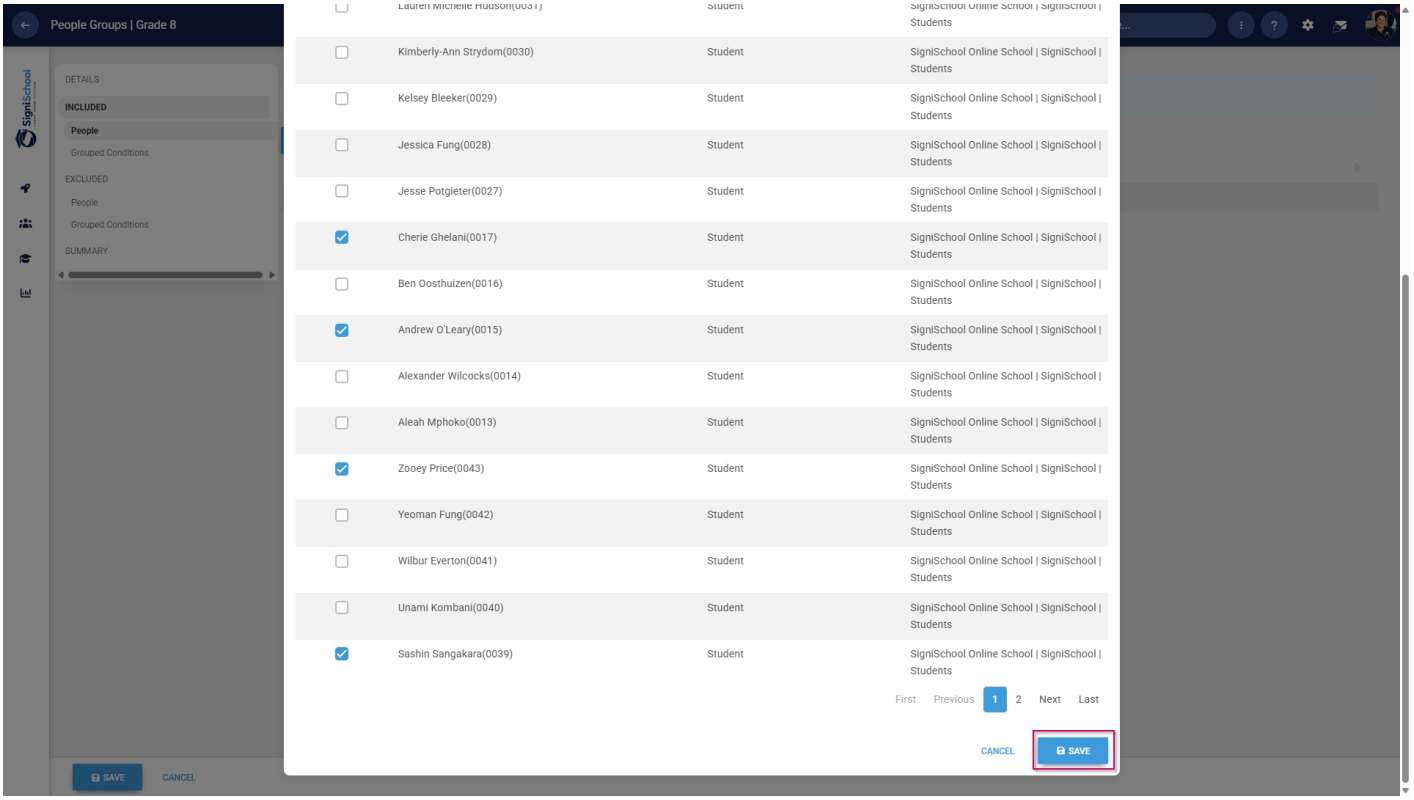
- In the **left-hand menu**, click to navigate to the **Included** section, then click **People** to add individuals.
- Click the **PEOPLE** button.



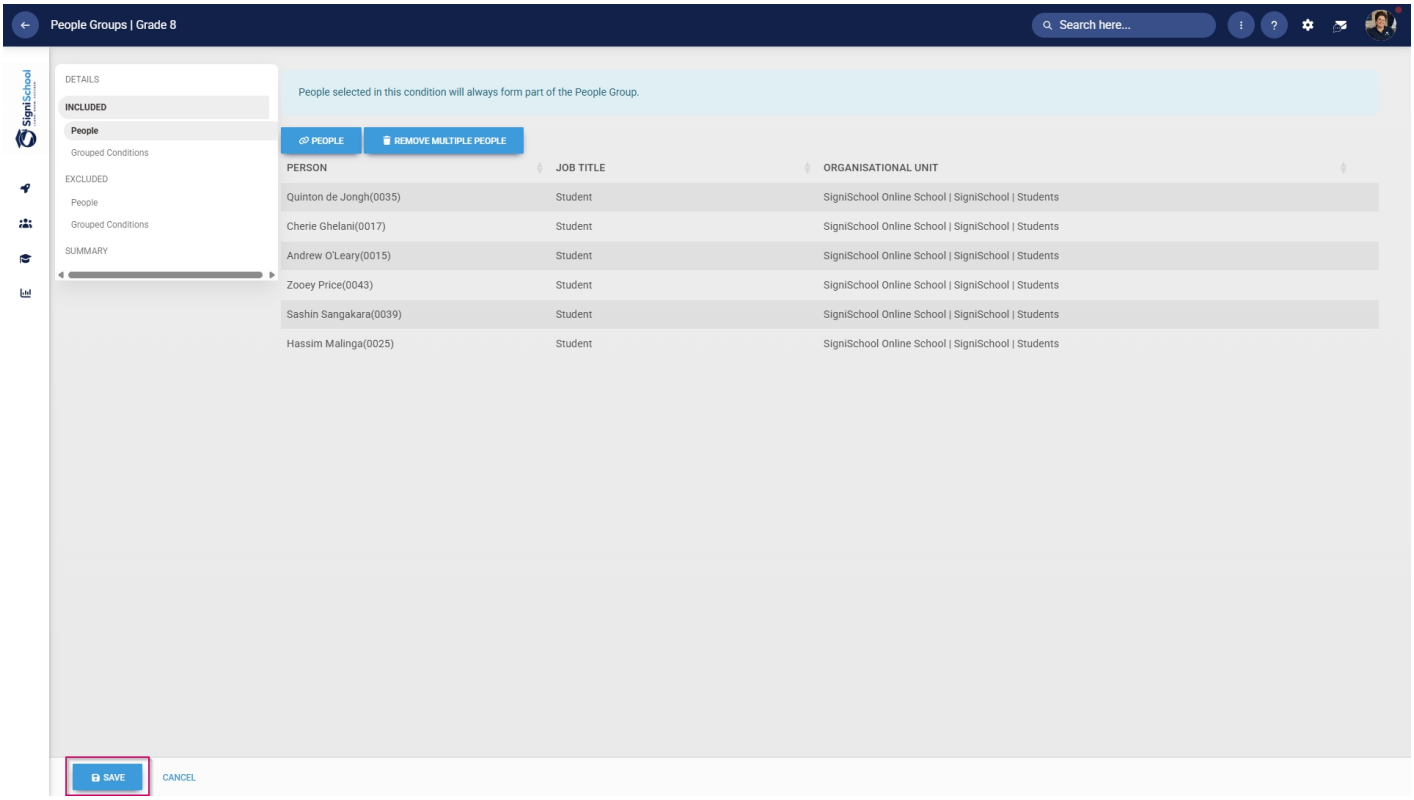
- Use the **search bar** to find a person based on their name, surname, username, or job title.
- Tick the **checkbox** to select a person.



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

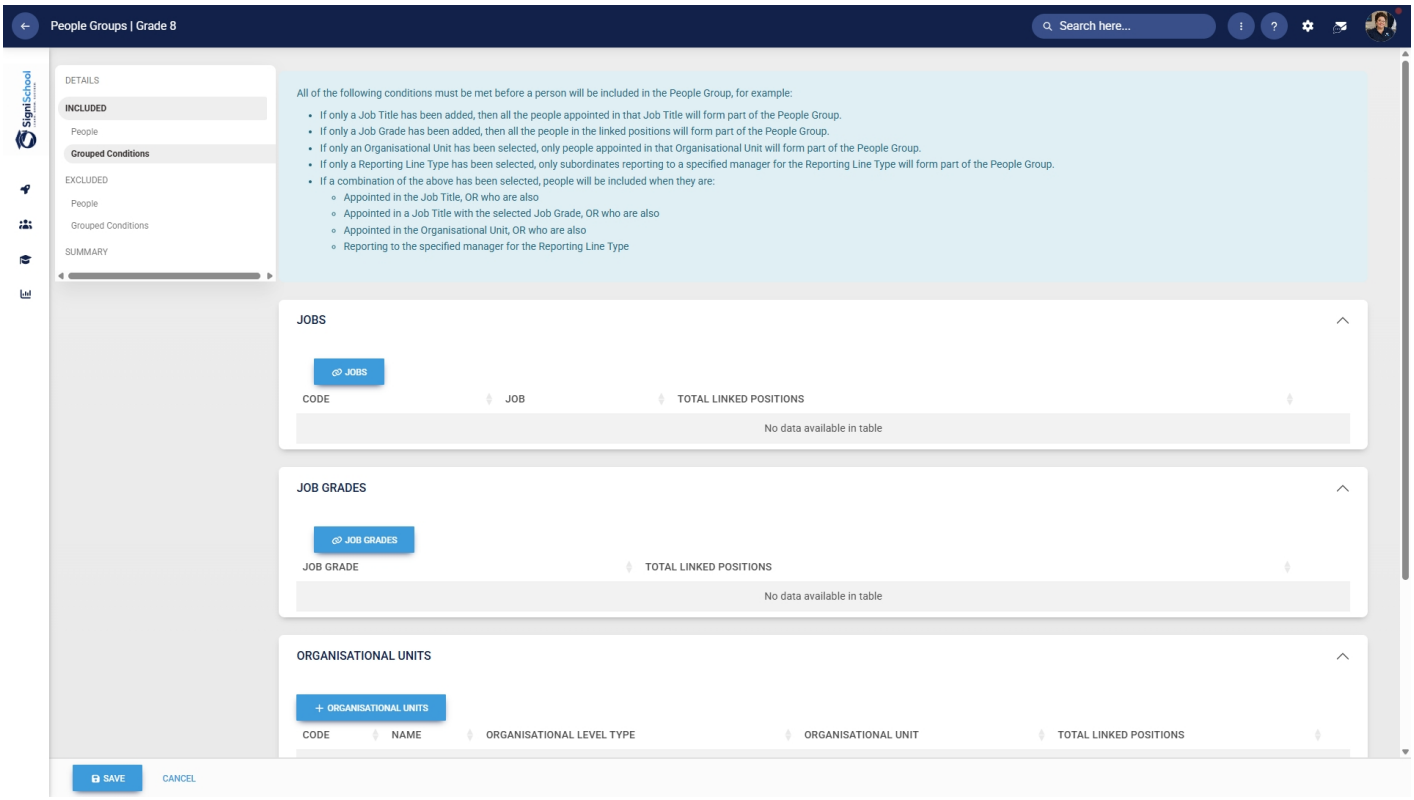


- Review the users added to your people group, then click **SAVE** when you are finished or click **CANCEL** to discard your edits.



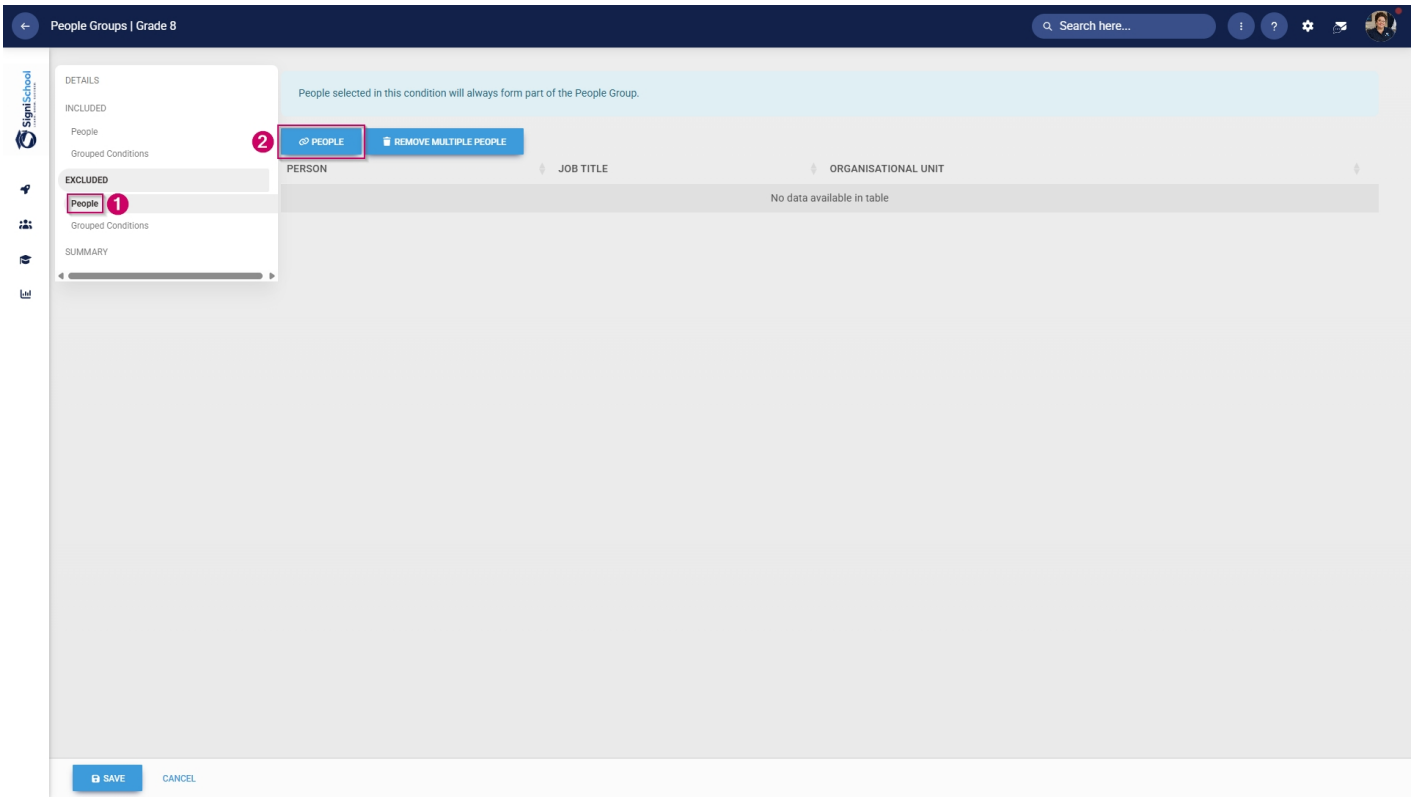
Included: Grouped conditions

- 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.



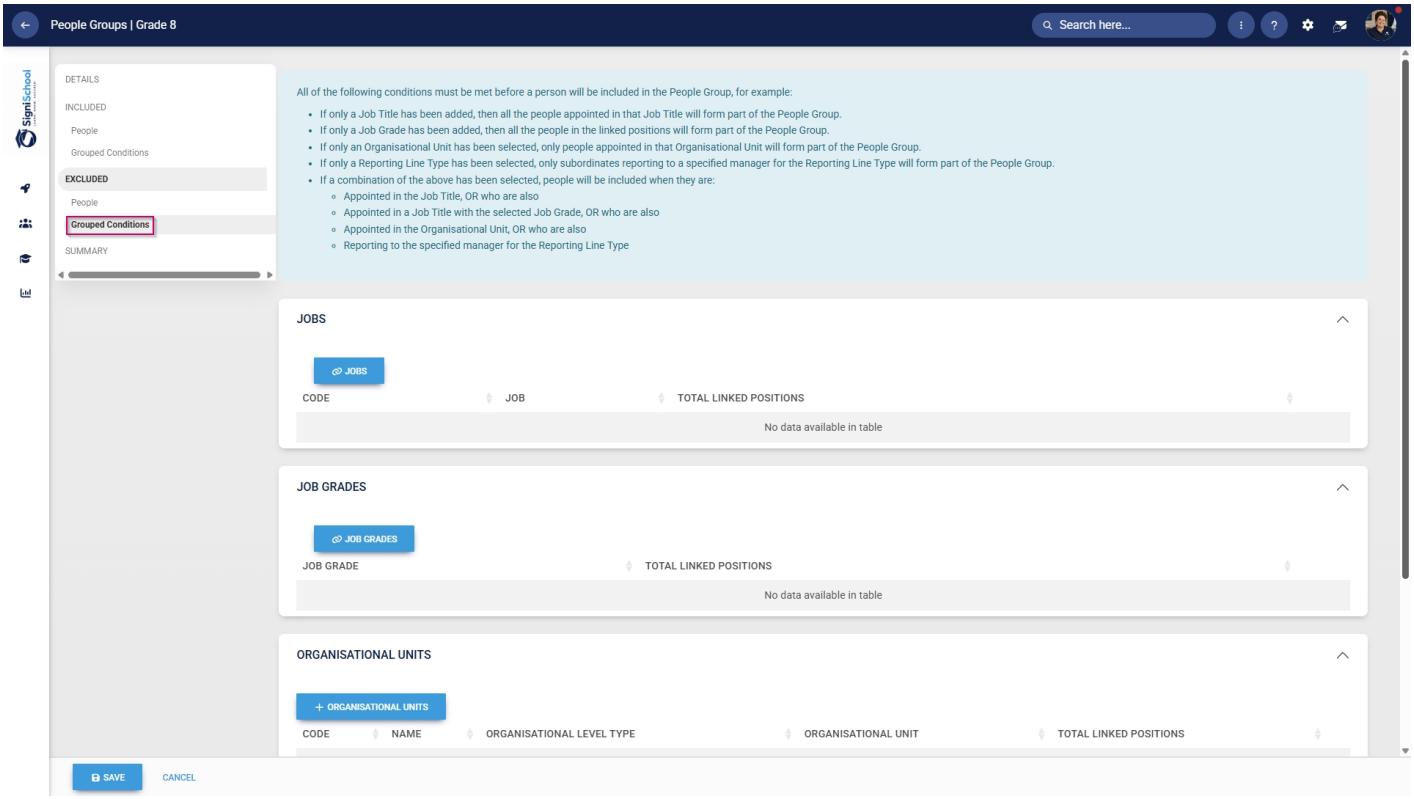
Included: Individuals

- 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.



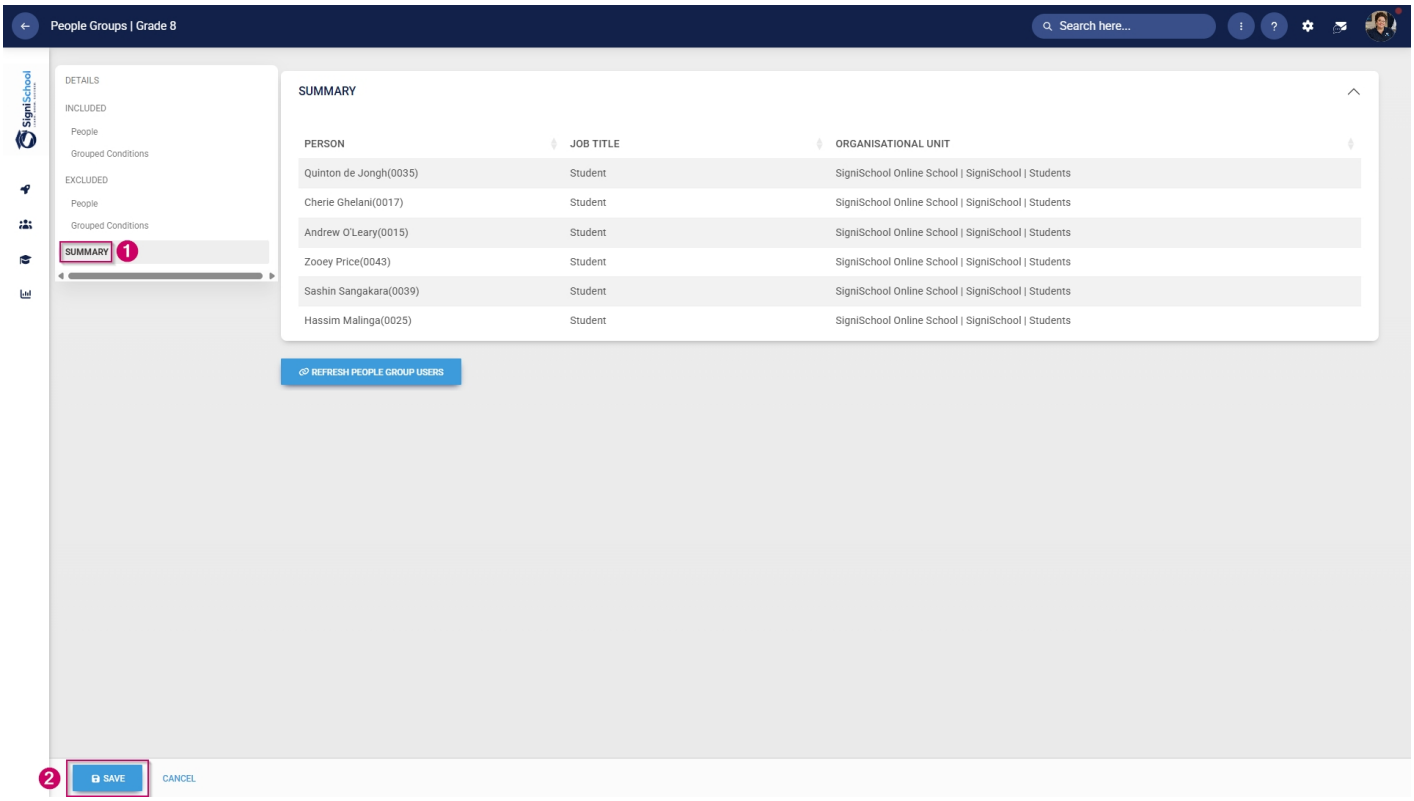
Excluded: Grouped conditions

- 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.



Summary

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

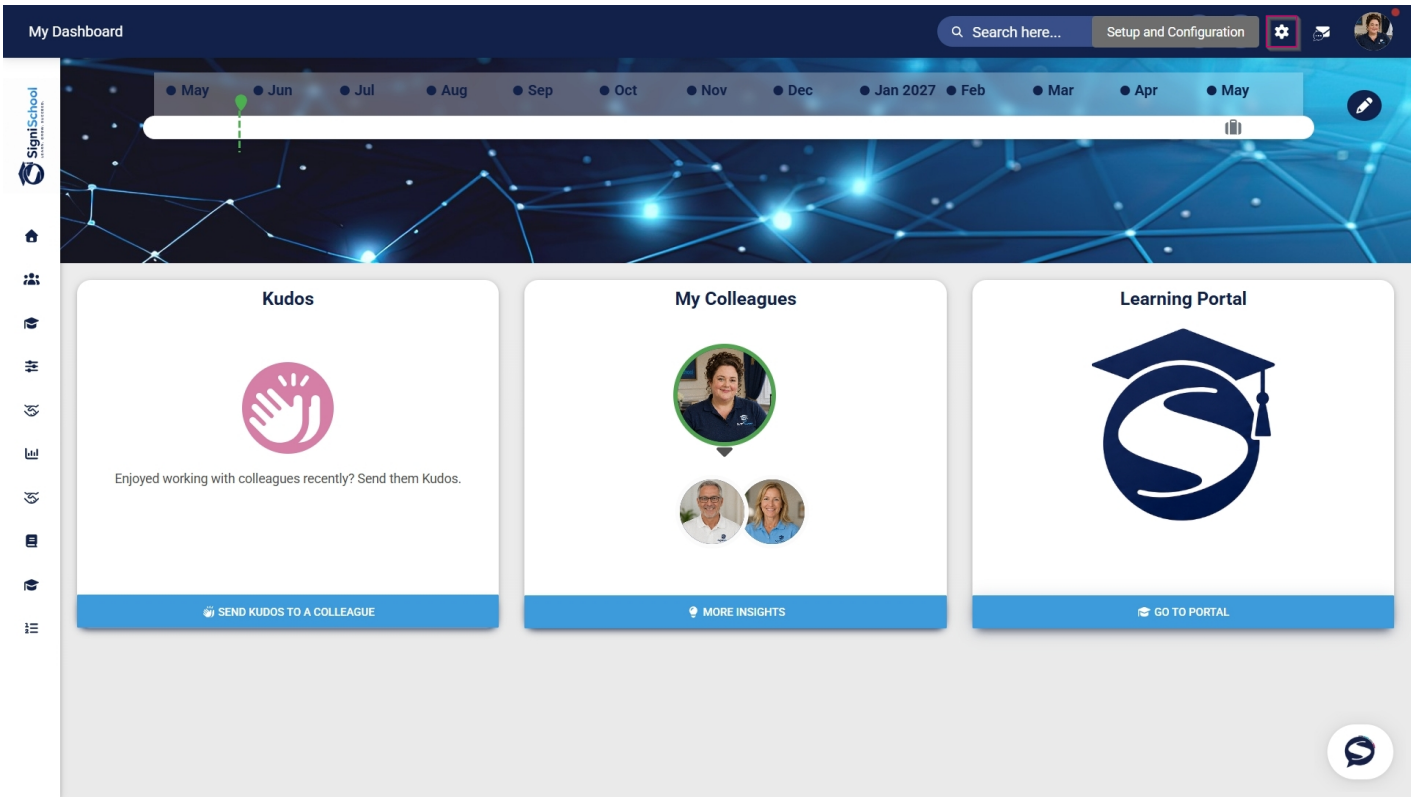


- > The people groups take some time to synchronise on the system once they're created. This can take anywhere from **10 minutes to 12 hours**, depending on the number of changes.

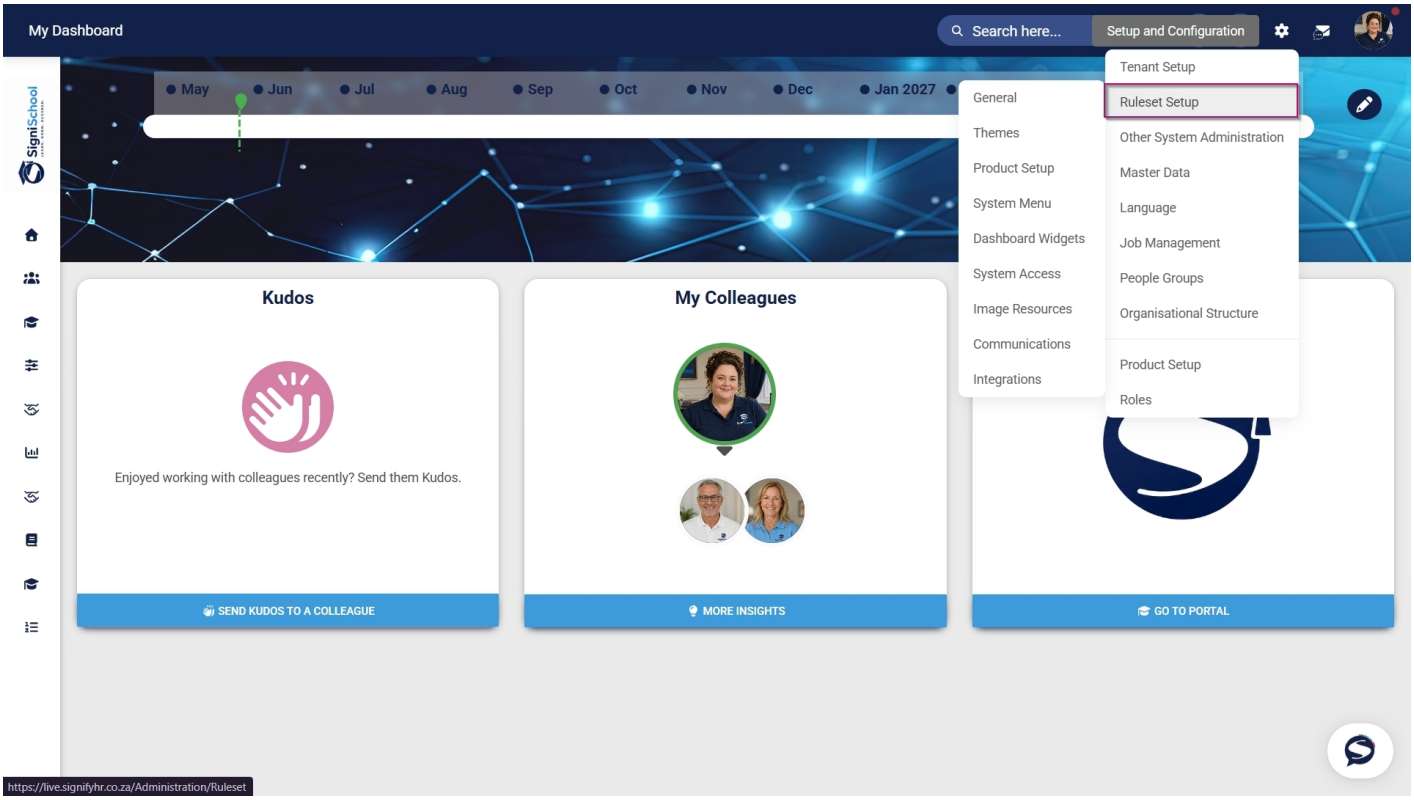
- To synchronise the newly-created or updated people groups manually, follow the steps in the next section.

Manually syncing people groups

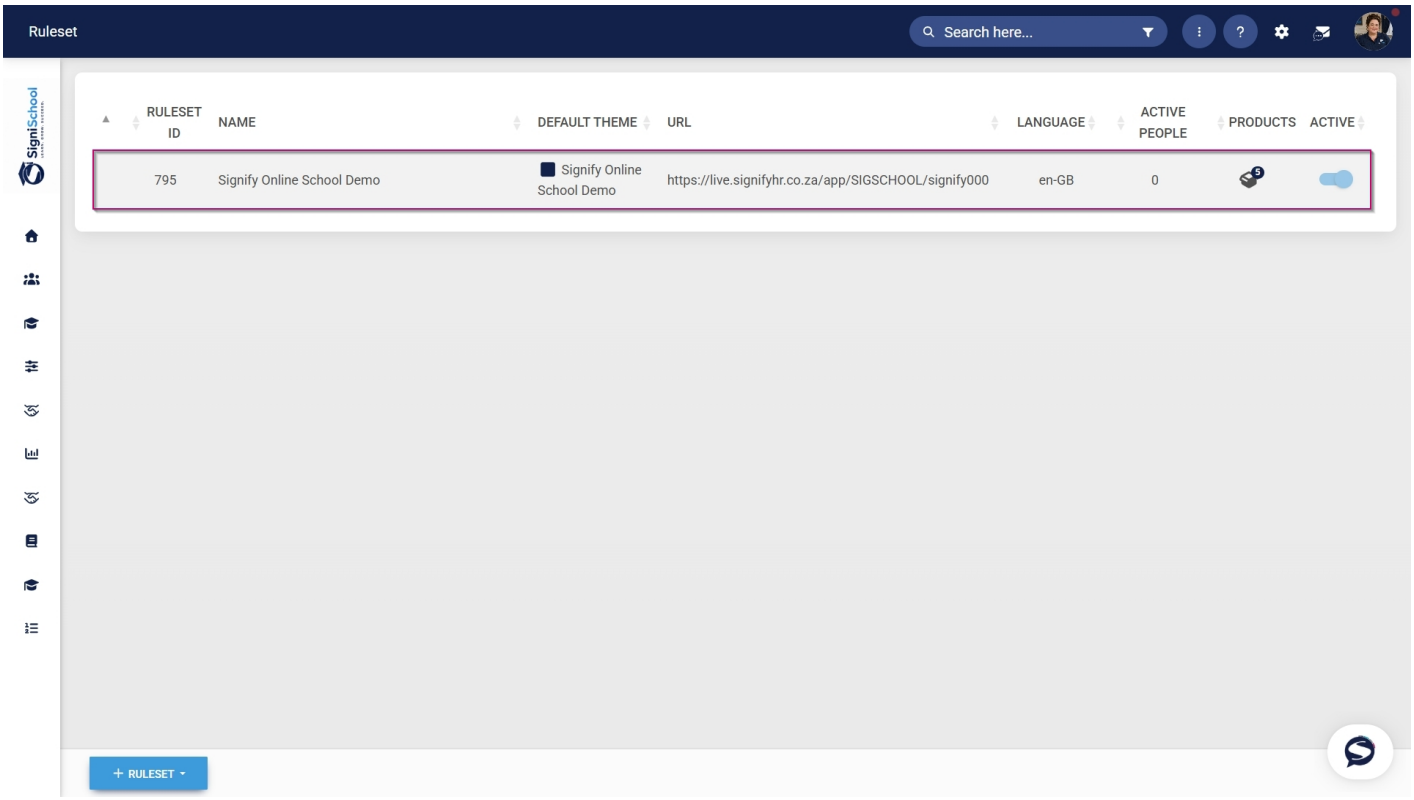
- Click the **gear icon** to access the **Setup and Configuration** menu.



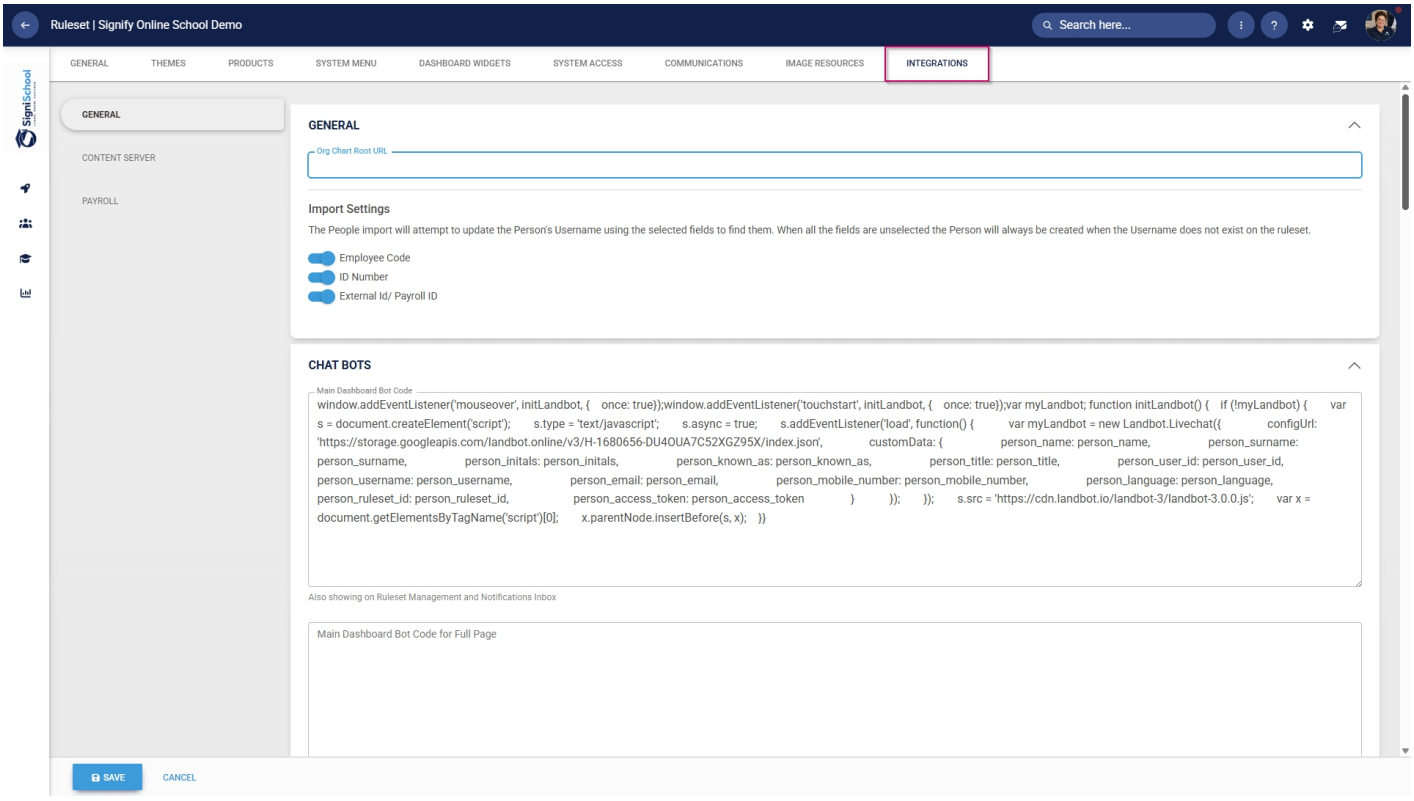
- Click **Ruleset Setup**.



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



- Navigate to the **Integrations** tab.

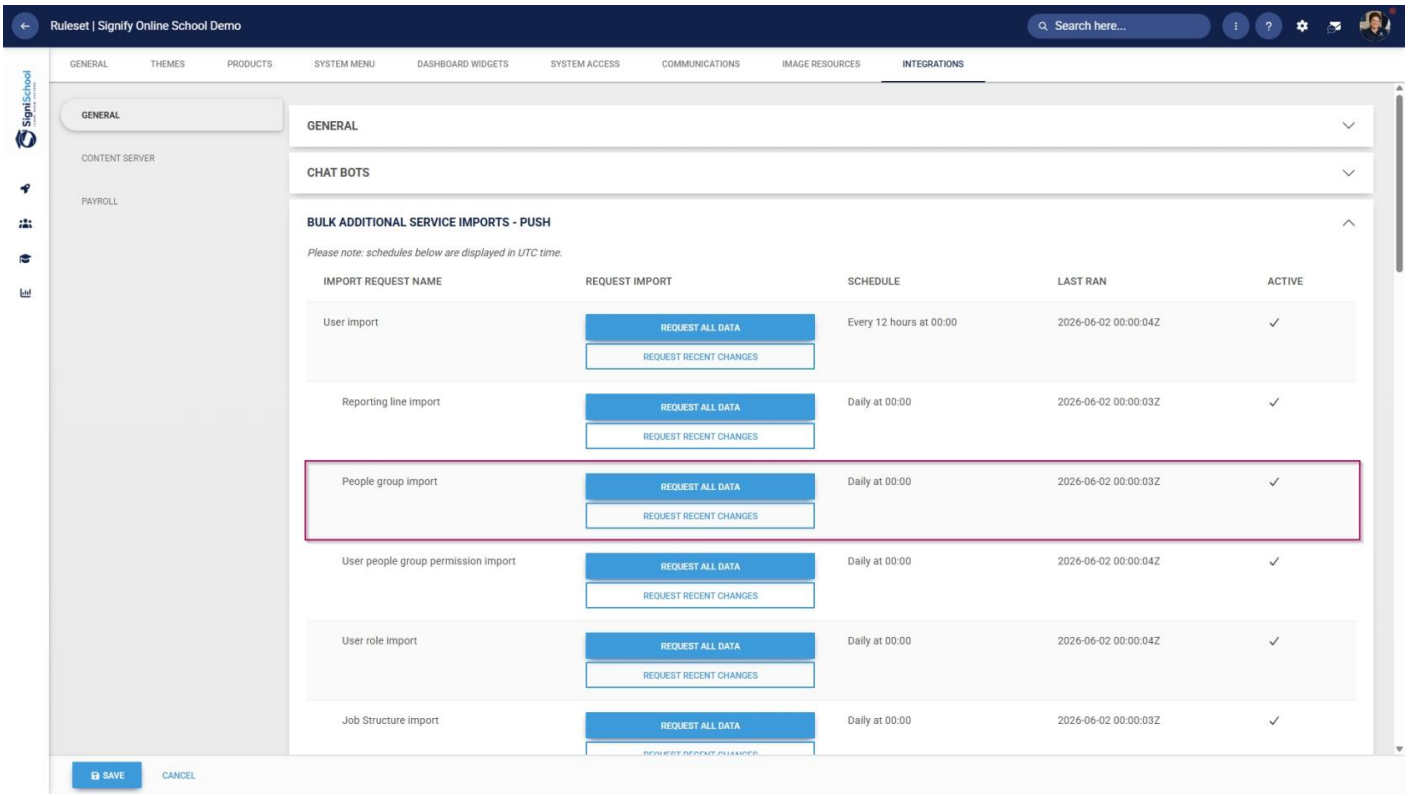


- Scroll down to the **Bulk Additional Service Imports – Push** section.
- For the **People group import** function, you have two options when synchronising manually:
  - ○ Click **REQUEST ALL DATA** to synchronise all the people groups.

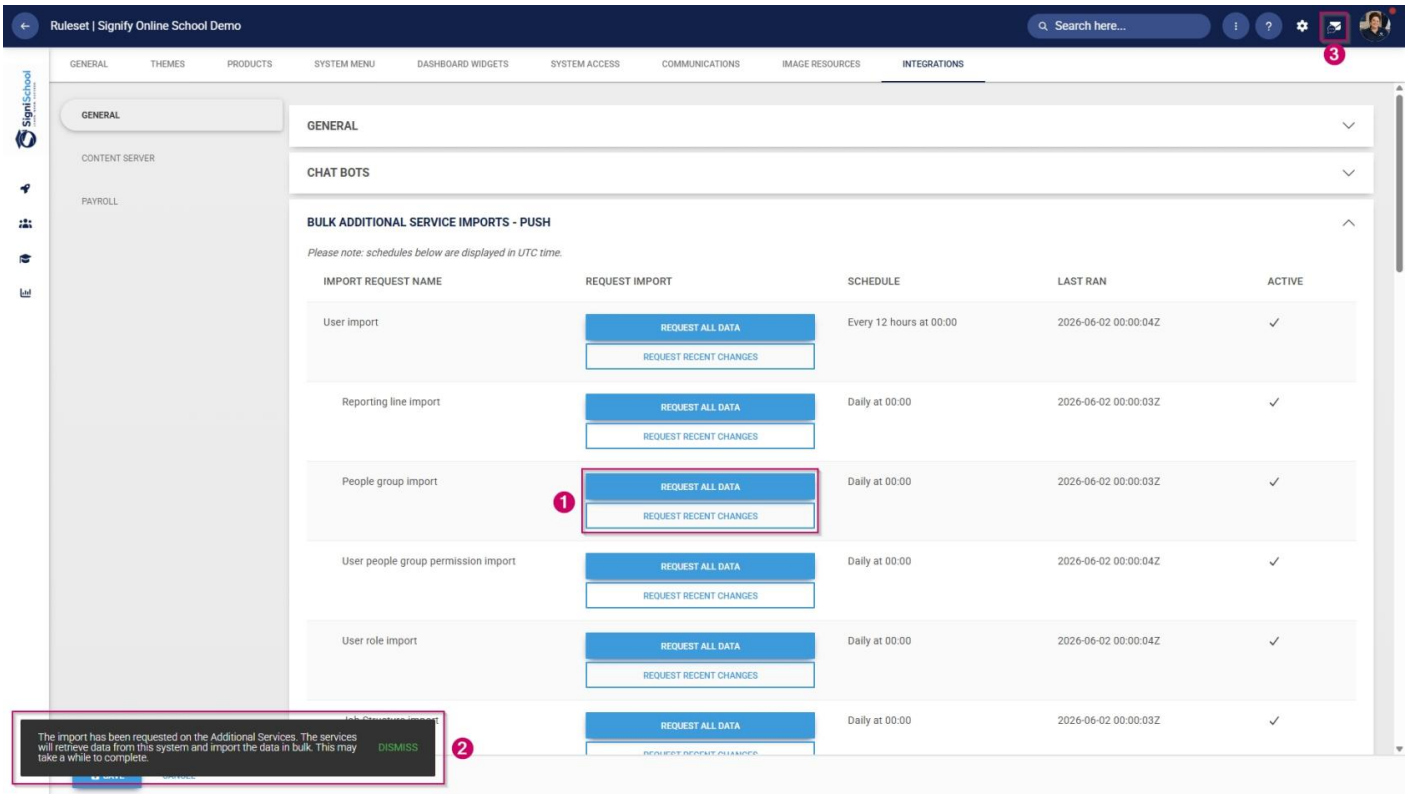
    - This is a **time-consuming** operation because all the people groups' data is overwritten and synchronised from scratch.

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

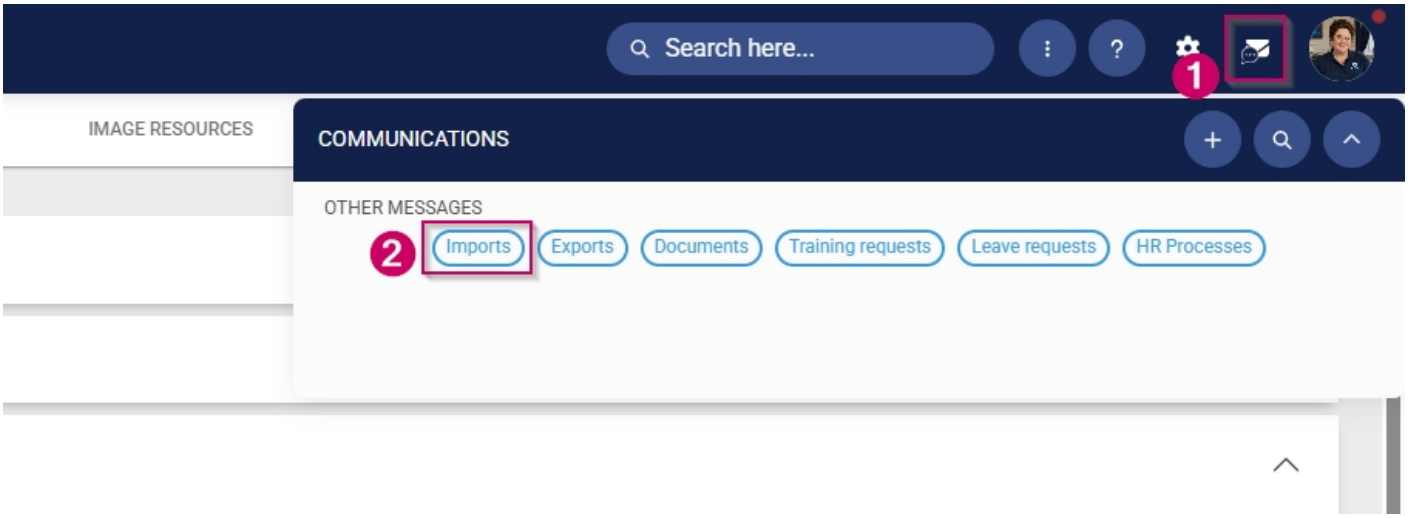
- Click **REQUEST RECENT CHANGES** to synchronise only recent changes to your people groups.
    - This is a **time-efficient** option because only the changes are synchronised, and the previous data remains unchanged.



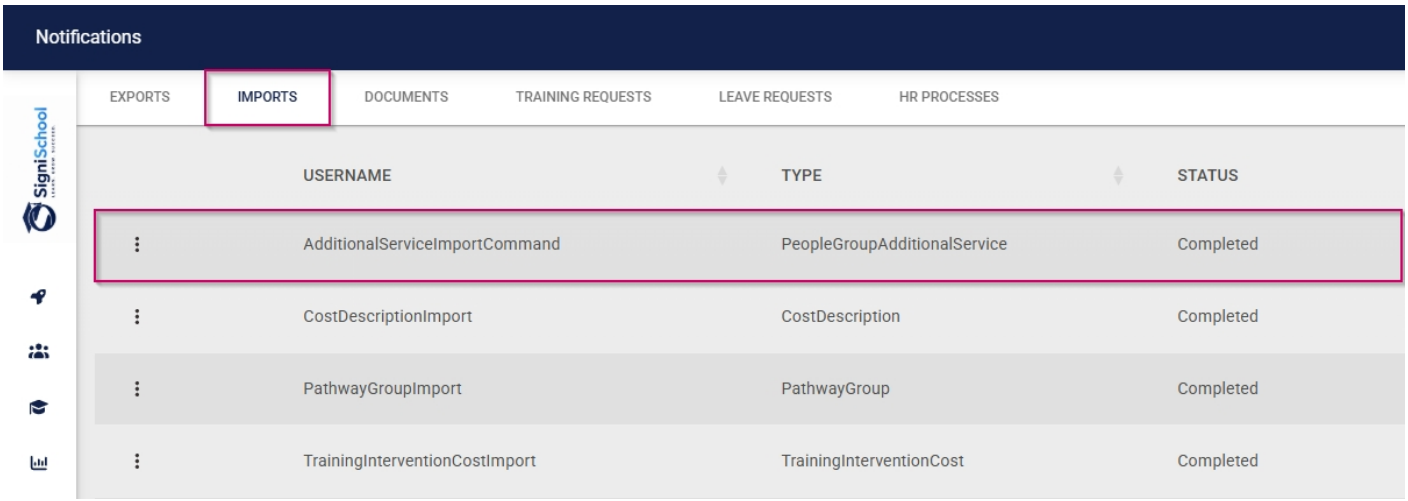
- Once you have selected a synchronisation method, a **message** will appear stating that the import has been requested. You can monitor the synchronisation progress by navigating to your **System Inbox**.



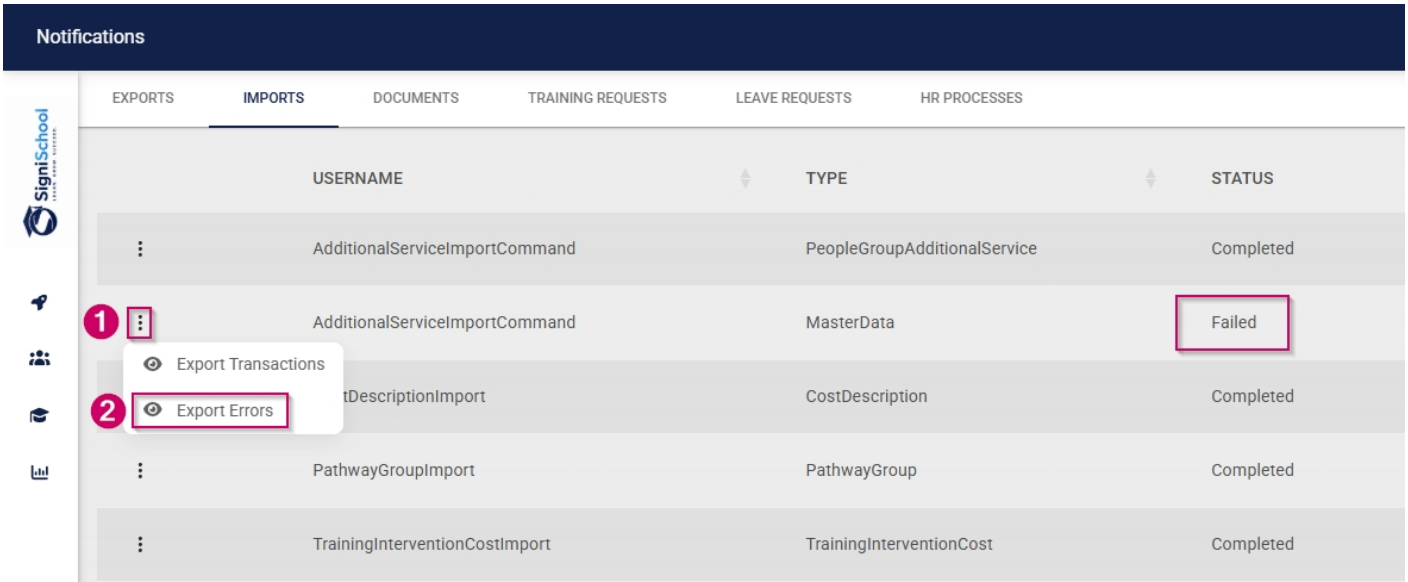
- Click the **envelope icon** at the top of your screen to navigate to your **System Inbox**, then click **Imports**.



- 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.



- 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.



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