

Dynamic Groups: Logic Sheet

Define specific needs for your organization and who needs to be included in the dynamic group.

Decide it: What are you looking for? Who do you need included?

Inclusion Rule (Who are also in)

Add people who meet all of your chosen conditions:

OR

Exclusion Rule (Who are not in)

Remove people who meet certain conditions:

Rule it: Under each header, fill in the blanks with the rule:

Inclusion Rule

I want to include everyone who is in:
Ex: Worksite B **AND** Dept. XY

Exclusion Rule

I want to remove everyone who is in:
Ex: Pay Type **NOT** Job Title

Test it:

- Does it give me only the people I want?
- Have I excluded anyone who should be included?
- Do I need both inclusion and exclusion rules to fine tune my results?