

# Hands on: Make two-step ad hoc group

- Make a group test:twoStepExcludes

Home > New group

## New group

**Create in this folder:**   
Enter a folder name or [search for a folder where you are allowed to create new groups.](#)

**Group name:**   
Name is the label that identifies this group, and might change.

**Group ID:**   Edit the ID  
ID is the unique identifier for this group. It should be short and simple, and might have character restrictions. The ID should rarely change, if ever.

**Description:**   
Description contains notes about the group, which could include: what the group represents, why it was created, etc.

[Show advanced properties](#) ▾

# Hands on: Add banderson

- Add banderson to test:twoStepExcludes


Home > Root > test > twoStepExcludes

## twoStepExcludes

+ Add members

More actions ▾

Member name or ID:

 Bob Anderson

Assign these privileges:

Default privileges  Custom privileges


**Add** or import a list of members .

More ▾

# Hands on: Setup employees

- Add banderson and jsmith to ref:employee:fulltime

Home > Root > ref > employee > fulltime

 + Add members



More ▼ More actions ▼

Members Privileges More ▼

The following table lists all entities which are members of this group.

Filter for: All members ▼ Member name Apply filter Reset

Remove selected members

<input type="checkbox"/> Entity name <span>▼</span>	Membership	Choose action
<input type="checkbox"/>  Bob Anderson	Direct	<span>Actions <span>▼</span></span>
<input type="checkbox"/>  John Smith	Direct	<span>Actions <span>▼</span></span>

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# Hands on: Create overall group

- Create test:twoStepOverall

## New group

**Create in this folder:**   
Enter a folder name or [search for a folder where you are allowed to create new groups.](#)

**Group name:**   
Name is the label that identifies this group, and might change.

**Group ID:**   Edit the ID  
ID is the unique identifier for this group. It should be short and simple, and might have character restrictions. The ID should rarely change, if ever.

**Description:**   
Description contains notes about the group, which could include: what the group represents, why it was created, etc.

Show advanced properties ▾

# Hands on: Edit Composite

- On group, More actions -> Edit composite

Home > Root > test > twoStepOverall



More ▾

+ Add members

More actions ▾

Members

Privileges

More ▾

Add to my favorites

Join group

Copy group

Delete group

Edit group

Edit composite

Move group

Export members

Import members

Remove all members

Attestation

The following table lists all entities which are members of this group.

Filter for:

All members

Member name

Remove selected members

Entity name ▾

Membership

Show: 50

Showing

# Hands on: Edit Composite (continued)

- Configure the composite


Home > Root > test > twoStepOverall

## twoStepOverall

Edit group composite

**Composite:**  No  Yes

**First factor group:**   
Enter a group name or ID, or [search for the first factor](#).


**Operation:**  

There are three composite operations: intersection, complement, and union.  
**Intersection** means members of the overall group must be in both factor groups. **Intersection** is used for example when requiring members to be active employees.  
**Complement** means members are in the first group but not in the second group. **Complement** is used for exclude lists.  
**Union** is not needed, you can just add the groups as members of the overall group.




**Second factor group:**   
Enter a group name or ID, or [search for the second factor](#).

# Hands on: Edit Composite (continued)


- See result. Is it what you expect?

 **twoStepOverall**+ Add members  
More actions ▾  
More ▾  
Members Privileges More ▾

The following table lists all entities which are members of this group.

Note: this group is a composite owner:  twoStepOverall is a composite of  fulltime minus  twoStepExcludes

Filter for:

<input type="checkbox"/> Entity name ▾	Membership	Choose action
<input type="checkbox"/>  John Smith	Indirect	<input type="button" value="Actions ▾"/>

Show:  Showing 1-1 of 1 · First | Prev | Next | Last

# Hands on: Qualtrics include / exclude

- Create a test:qualtrics group

Home > New group

## New group

**Create in this folder:**   
Enter a folder name or [search for a folder where you are allowed to create new groups](#).

**Group name:**   
Name is the label that identifies this group, and might change.

**Group ID:**   Edit the ID  
ID is the unique identifier for this group. It should be short and simple, and might have character restrictions. The ID should rarely change, if ever.

**Description:**   
Description contains notes about the group, which could include: what the group represents, why it was created, etc.

[Show advanced properties](#) ▾



# Hands on: Qualtrics (continued)

- More actions -> Attribute assignments

The screenshot displays the Qualtrics user interface for a group named 'qualtrics'. The breadcrumb trail at the top reads 'Home > Root > test > qualtrics'. The main header includes the Qualtrics logo and a '+ Add members' button. Below the header, there are tabs for 'Members', 'Privileges', and 'More'. A 'More actions' dropdown menu is open, listing various actions such as 'Add to my favorites', 'Join group', 'Copy group', 'Delete group', 'Edit group', 'Edit composite', 'Move group', 'Export members', 'Import members', 'Remove all members', 'Attestation', 'Deprovisioning', 'View audit log', 'View membership audit log', 'View action audit log', 'View privilege audit log', 'Permissions', and 'Attribute assignments'. The 'Attribute assignments' option is highlighted in blue. The main content area shows a table of members with a 'Filter for:' dropdown set to 'All members' and a search box for 'Member name'. A 'Remove selected members' button is visible above the table. The table has columns for 'Entity name' and 'Membership'. A 'Show: 50' dropdown is also present.

# Hands on: Qualtrics (continued)

- Assign the addIncludeExclude attribute

The screenshot shows the Qualtrics user interface. At the top, a breadcrumb trail reads "Home > Root > test > qualtrics". Below this is the Qualtrics logo and a "More actions" button. A "More" dropdown menu is open, showing options for "Members", "Privileges", and another "More" dropdown. The main content area is titled "Attribute assignments" and includes a "+ Assign attribute" button. A text block states: "The following table lists all attributes assigned to this group". Below this is a form for assigning an attribute. The "Attribute name" field contains the text "etc:legacy:attribute:legacyGroupType\_addIncludeExclude". A descriptive note below the field reads: "The attribute name is the part of the attribute which is assigned to owner objects. Generally multiple attribute names are related to one attribute definition." A "Save" button is positioned below the form. At the bottom of the page, it says "No attributes assigned".

Home > Root > test > qualtrics

qualtrics

More actions ▾

More ▾

Members Privileges More ▾

Attribute assignments [+ Assign attribute](#)

The following table lists all attributes assigned to this group

**Attribute name:**

The attribute name is the part of the attribute which is assigned to owner objects. Generally multiple attribute names are related to one attribute definition.

[Save](#)

No attributes assigned

# Hands on: Qualtrics (continued)

- See the extra groups

 qualtrics

 qualtrics excludes

 qualtrics includes

 qualtrics system of record

 qualtrics system of record and includes

# Hands on: Qualtrics (continued)

- Add fulltime to system of record

Home > Root > test > qualtrics system of record

## qualtrics system of record

Group containing list of qualtrics (generally straight from the system of record) without yet considering manual include or exclude lists

[+ Add members](#) [More actions ▾](#)




**More ▾**

[Members](#) [Privileges](#) [More ▾](#)

The following table lists all entities which are members of this group.

**Filter for:**   [Apply filter](#) [Reset](#)

[Remove selected members](#)

<input type="checkbox"/> <b>Entity name ▾</b>	<b>Membership</b>	<b>Choose action</b>
<input type="checkbox"/>  Bob Anderson	Indirect	<a href="#">Actions ▾</a>
<input type="checkbox"/>  John Smith	Indirect	<a href="#">Actions ▾</a>
<input type="checkbox"/>  fulltime	Direct	<a href="#">Actions ▾</a>

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# Hands on: Qualtrics (continued)

- Add banderson to excludes

Home > Root > test > qualtrics excludes

## qualtrics excludes

Group containing manual list of excludes for group qualtrics which will not be in the overall group

[+ Add members](#)

[More actions ▾](#)


**More ▾**

[Members](#) [Privileges](#) [More ▾](#)

The following table lists all entities which are members of this group.

**Filter for:**   [Apply filter](#) [Reset](#)

[Remove selected members](#)

<input type="checkbox"/> Entity name ▾	Membership	Choose action
<input type="checkbox"/>  Bob Anderson	Direct	<a href="#">Actions ▾</a>

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# Hands on: Qualtrics (continued)

- Add GrouperSysAdmin to includes

Home > Root > test > qualtrics includes

## qualtrics includes + Add members

Group containing manual list of includes for group qualtrics which will be added to the system of record list (unless the subject is also in the excludes group) More actions ▾


**More ▾**

Members Privileges More ▾

The following table lists all entities which are members of this group.

**Filter for:** All members ▾ Member name Apply filter Reset

Remove selected members

<input type="checkbox"/> Entity name ▾	Membership	Choose action
<input type="checkbox"/>  GrouperSysAdmin	Direct	<span>Actions ▾</span>

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# Hands on: Qualtrics (continued)

- See the overall group, is it what you expect?

**qualtrics** + Add members More actions ▾

Group containing list of qualtrics after adding the includes and subtracting the excludes

**More ▾**

Members Privileges More ▾

The following table lists all entities which are members of this group.

Note: this group is a composite owner: qualtrics is a composite of qualtrics system of record and includes minus qualtrics excludes

**Filter for:** All members ▾  Apply filter Reset

Remove selected members

<input type="checkbox"/> Entity name ▾	Membership	Choose action
<input type="checkbox"/> GrouperSysAdmin	Indirect	<span>Actions ▾</span>
<input type="checkbox"/> John Smith	Indirect	<span>Actions ▾</span>

Show: 50 ▾ Showing 1-2 of 2 · First | Prev | Next | Last