## Create an Engagement Dynamic Group

## To create an engagement dynamic group:

- 1. Navigate to **Vendors** > **Group Definitions**, then expand the Dynamic group tree on the left pane.
- 2. Click Engagements.
- 3. Click Actions > New child group on the right pane.
- 4. Click Go to open the Dynamic Group wizard.

| Agriliance - Administrator   User Settings   🔀 Configure UI   Help   Logout   |              |                                 |   |  |
|---|--------------|---------------------------------|---|--|
| Home Vendors Assessments  | Content Anal | lytics Configuration            |   |  |
| Vendors Group Definitions About this page   |              |                                 |   |  |
| 💺 Dynamic Groups  | -            | 👢 Dynamic Group: %Ver           | idorServices%   |  |
| Engagements<br>Organization Hierarchy<br>Dynamic Groups<br>Engagements<br>By Assessment Due Date<br>By Assessment Workflow Stage<br>By By Assessment Workflow Stage<br>By By Assessment Workflow Stage<br>By Country<br>By Country<br>Dig Country | Actions ↔    | Dynamic Group ><br>Applications | Information General Name %VendorServices% Description %VendorServices% node Group By and Filter Group By and Filter Group By NA Filter Managed Vendor Services Fixed Child Nodes N/A Display Preferences Show this node in the hierarchy Yes Show child nodes with unknown value No Show child nodes with unknown value No Show individual entities as children of this node No | Actions: Select an action V<br>Select an action<br>New child group<br>Copy group to<br>More group to<br>Dalete group |

Clicking New Child Group in the Actions dropdown.

- 5. Click the **General** tab, then enter the **Name** and **Description**.
- 6. Click **Next** to open the **Group by** tab.
- 7. Click Group by Category > Engagement Description.
- 8. Follow the wizard instructions to create the engagement dynamic group. The newly created dynamic group will appear under the **Engagements** node.