

Group Management

There are a few ways to manage **People Groups** in the CC platform:

- Manually using the Dashboard
- Using the People Excel template
- Using the Group Excel template

Please note: Group names have a maximum of 50 characters. If you try to upload a spreadsheet containing any group names over 50 characters, then it will not upload due to this limitation. When bulk uploading you can only upload 26 groups at a time.

Group Management

<https://player.vimeo.com/video/330442812>

Group Excel Template Management

In a recent release, we added the ability to manage **People** and their **Groups** by importing and exporting an Excel template.

The format of the Excel document is as below:

| Group Name | Group Name | Group Name... |
|-------------------|-------------------|-------------------|
| email or alias | email or alias | email or alias |
| email or alias... | email or alias... | email or alias... |

The group names are in the top row, and the list of users who are to be in each group are listed below, one item per cell.

Any email address or alias which is in the Group Template, but doesn't match a Person in the app's database will be ignored by the importer.

*Note: whilst both **People Template** management of Group importing / exporting and **Group Template** management of Group importing / exporting are both fully working and inter-operable at the same time, it's important to remember to treat the data in the CC platform as the "truth" once an import has taken place. It's possible to overwrite data if you import an old template file to the*

platform after changes have been made.

In short, be sure to export from the platform immediately before any changes are made, and immediately re-import once those changes have been made.

Revision #6

Created 19 March 2019 20:08:56 by Chris

Updated 21 July 2023 14:02:02 by Kim Proctor