Prescriptive Rules for Smart Lists

# 1: Create Prescriptive Rule Matching the List

Make a PR that runs daily (it could be another frequency, if desired) that corresponds to one of the smart lists. Here I’m using the list “All Contingent Workers - ONSITE, ONSITE HYBRID & NOT CLASSIFIED”, so I named the PR that for consistency. Ensure it is set to run using admin privileges.

Graphical user interface, application

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# 2: Set the Membership to Match the Smart List

On step 2 of the PR, the member selection, choose the “use an existing smart list” option and select the smart list we’re using.

Graphical user interface, application

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# 3: Add the Required Role and/or Certification

On step 3 of the PR, the requirements, select what is to be assigned. By the looks of it this will normally be the role, so click the “add required job roles” link and select the corresponding role. If there’s not a role, and a cert is being assigned directly, do that instead. Using roles, if they exist, if preferable for maintainability and organization purposes, so we want to use roles if possible; the end result will be the same though – ether this rule will assign the role, which will then apply the certification requirements, or this rule will assign them directly.

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# 5: Finishing

Once you progress through the final step of saving and activating the rule, it will run the next time its designated time comes up. Repeat ad nauseum.