


Populating a List with Members

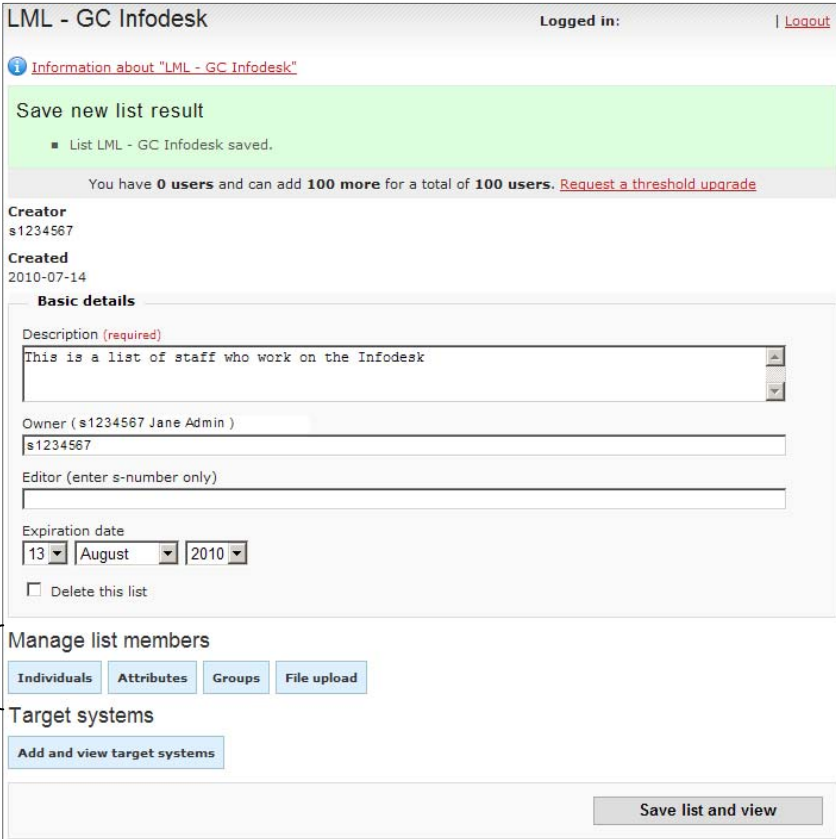
There are four possible methods for populating a list with members:

- Adding individual people i.e. an individual at a time
- Mass population based on attributes e.g. campus or organisational unit
- Inclusion of organisational groups
- File upload (list of sNumbers)

A lists' membership is managed from the **Manage list** members section on the List properties page (see Figure 1).

To open the List properties page:

Click  to the right of the list name to open the List properties page.



The screenshot shows the 'List properties' page for 'LML - GC Infodesk'. At the top, it says 'Logged in: | Logout'. Below that is an information icon and the text 'Information about "LML - GC Infodesk"'. A green box contains the message 'Save new list result' and 'List LML - GC Infodesk saved.'. Below this, it states 'You have 0 users and can add 100 more for a total of 100 users. Request a threshold upgrade'. The 'Creator' is 's1234567' and it was 'Created' on '2010-07-14'. The 'Basic details' section includes a 'Description (required)' field with the text 'This is a list of staff who work on the Infodesk', an 'Owner (s1234567 Jane Admin)' field with 's1234567', an 'Editor (enter s-number only)' field, and an 'Expiration date' field set to '13 August 2010'. There is a checkbox for 'Delete this list'. Below the 'Basic details' is the 'Manage list members' section with buttons for 'Individuals', 'Attributes', 'Groups', and 'File upload'. Below that is the 'Target systems' section with a button 'Add and view target systems'. At the bottom right is a 'Save list and view' button. A bracket on the left side of the 'Manage list members' section is labeled 'Manage list members'.

Figure 1: List properties page

Affiliations

A person must have a current Griffith affiliation (i.e. be an active user) in order to be included in a membership list. Over time, existing list members may become inactive i.e. no longer have a current Griffith affiliation and should be removed from membership lists. Inactive members must be manually removed (deleted) by the list owner and/or editor(s). Inactive members who are not manually removed from lists, are automatically removed by the system 12 months from the date of losing their affiliation.

Adding Individual Members

User's must first search for a person to then add them as an individual list member. Users can search for a person by:

- First name
- Last name
- First and last name
- sNumber (e.g. s123456)

Searching is not case sensitive i.e. upper or lowercase can be used when performing a search.


To add an individual member:

Click **Individuals** on the List properties page to open the Individual member page.

Type the required name **or**

type the required sNumber in the **Search for new member** field.

Click **Search** to display matching results.

Click  beside the required person. An **Add member result** message banner is displayed at the top of the page confirming if the addition was successful or not.

Repeat search to add another member if required.

Click **Return to main edit view** to return to the List properties page **or**

click **View list members** to view a list of members.



Figure 2: Add member result - message banner

Adding Members According to Attributes

One or more attributes can be used for filtering or selecting list members. Attributes include:

- Affiliation – a person's relationship with the university e.g. student or employee
- Campus – a person's primary location within the university e.g. Nathan or Gold Coast
- Gender – a person's gender e.g. female or male
- Residency – a person's residency status e.g. domestic or international
- Student HECS status e.g. domestic fee paying
- Course offering – student course offerings e.g. 1001ICT#3095#NA
- Organisational unit – the organisational unit a person belongs to

Population rules can also be applied when selecting attributes including:

- Update membership frequency – update memberships every night (yes/no)
 - Selecting 'yes' ensures the list is re-populated nightly based on the selected attributes.
- Rule matching – match all attribute rules or any (all/any)
 - Selecting 'any' filters all people who match *any* of the selected attributes
 - Selecting 'all' filters all people who match *all* of the selected attributes

A list has a maximum threshold which is determined by the list target system(s) i.e. the maximum number of members allowed for the list. If the number of people selected (those which match the proposed attributes) exceed the maximum list threshold, the list owner or editor can request a threshold upgrade. See related modules below for more information regarding list thresholds.

To add a member according to attribute(s):


Click [Attributes](#) on the List properties page to open the Select by attributes page.

Select update frequency (yes or no).

Select rule matching (any or all).

Select required attributes in the **Configure attribute member list** section

Click [Propose attributes](#) to view a list of proposed attributes according to previous selection(s).

Click  beside attribute(s) to remove if required.

Click [Propose attributes](#) any number of times to add different values of the same attribute (e.g. multiple campuses). Attributes will be added to the 'Proposed attributes list'.

Click [Finalise attribute list](#) to open the Attributes page. A **Save new attribute list result** message banner will display at the top of the page confirming if the addition was successful or not.

Click [Request a threshold upgrade](#) if required.

Click [Return to main edit view](#) to return to the List properties page **or**


click [View list members](#) to view a list of members.

It is also possible to change existing attributes to populate a list.

Changing existing attributes to populate a list:

Click [Attributes](#) on the List properties page to open the Select by attributes page.

Click [Rework attributes](#) to view current attributes.

Click  to remove any of the proposed attributes from the 'Proposed attribute lists'.

Select the required new attributes in the **Configure attribute member list** section.

Click [Propose attributes](#) to populate the new 'Proposed attribute list'.

NOTE: When existing attributes are changed, all existing members (populated according to attributes) are deleted from the list; the list is then re-populated according to the new attributes.

Removing members who have been added to a list according to attribute can only be done from the Select by attributes page.

To delete all attributes and associated members:

Click [Attributes](#) on the List properties page to open the Select by attributes page.

Click [Clear attributes](#).

Click [Return to main edit view](#) to return to the List properties page **or**


click [View list members](#) to view a list of members.

Adding Organisational Groups

Organisational groups can be used to populate a membership list. Organisational groups are updated nightly according to current HR (Human Resource) data. Membership lists populated using this method are automatically updated at the same time e.g. when a new member is added to an organisational group, they are also added to any affiliated List Management lists. See related modules below for more information regarding organisational lists.


User's must first search for an organisational group to then add it to the membership list. Users can search for a list by name. Searching is not case sensitive i.e. upper or lowercase can be used when performing a search.

To populate a list using an organisational list:

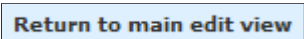
Click  on the List properties page to open the Manage organisational groups page.

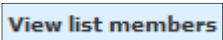
Type the required name.

Click  to display matching results.

Click  beside the required group. An **Add group result** message banner is displayed at the top of the page confirming if the addition was successful or not.

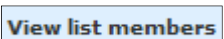
Repeat search to add another group if required.

Click  to return to the List properties page **or**

click  to view a list of members.

NOTE: Individual list members do not display on the List properties page, only the organisational group name will.

To view individual members:

Click .

File Upload

An existing file can be used to populate a membership list, providing it is in CSV (Comma Separated Value) format e.g. filename.csv. An example of a CSV formatted file is a Microsoft Excel file. The file must include a column with the first cell value (first line) as 'username'; subsequent cells in the column should have individual sNumbers as the value (see Figure 3).

	A	B
1	username	
2	s123456	
3	s234567	
4	s345678	
5	s456789	

Figure 3: Excel file - correct format for file upload

Each cell value (sNumber) is treated as an individual list member when added to the list. If the cell value is not recognised in the system (e.g. and inactive user), the individual is not added to the list.

To populate a list by file upload:

- Click **File upload** on the List properties page to open the Bulk upload members in list page (see Figure 4).
- Click **Browse...** to open the **Choose file** dialog box. Select the required file.
- Click **Open** to add the file to the **Names file** field.
- Click **Upload** to display a list of members to be imported from the upload file.
- Click **Add these members**. An **Add members result** message banner is displayed at the top of the page confirming if the addition was successful or not.
- Click **Return to main edit view** to return to the List properties page **or** click **View list members** to view a list of members.

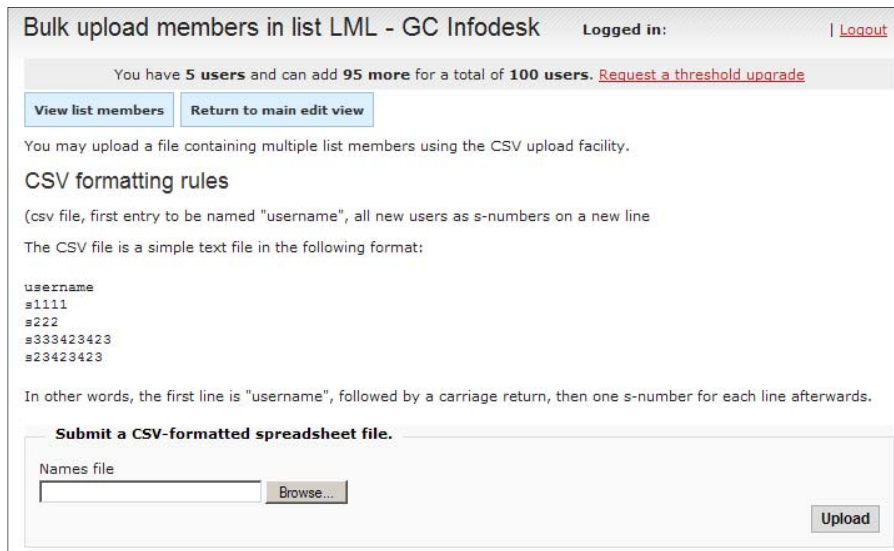


Figure 4: Bulk upload members in list page

Related modules

- Introduction to List Management
- Searching
- Creating a List
- Specialised and Organisational Lists
- Populating a List – Individuals
- Populating a List – Attributes
- Populating a List – Groups
- Populating a List – File Upload

Additional learning tools / sources of information

- See <https://intranet.secure.griffith.edu.au/computing/list-management/training> for links to self help print material.