

# How to...

## Navigate the List Management System

## Introduction

The dashboard is the main page of the List Management System (LMS) and is displayed when a user logs in to the system. It provides access to relevant list information including:

- Action items – outstanding actions that require completion
- Pending requests – requests awaiting approval
- My lists – specialised lists created and/or managed by the user

## The Dashboard

- 1 Return to the dashboard at any time by selecting the **List Management** button.

Menu

List management

> New list

> Search

> Contact us

Dashboard

This page provides an overview of your lists and lists you are a member of as well as any request or actions you are required to take. To come back to this page please Click on the red 'List Management' link.

Action items

List name	Requestor	Request	List threshold
<a href="#">LML - DD List 2</a>	Steven	Remove membership	2574/∞

Pending requests

List name	Request
<a href="#">LML - Example</a>	Increase threshold

My lists

List name	Status	Access type
<a href="#">LML - DD List 2</a>	ACTIVE	OWNER
<a href="#">LML - DD List 4</a>	ACTIVE	OWNER
<a href="#">LML - DD List 5</a>	ACTIVE	OWNER
<a href="#">LML - DD List 6</a>	ACTIVE	OWNER
<a href="#">LML - Example</a>	ACTIVE	OWNER
<a href="#">LML - Threshold 1</a>	ACTIVE	OWNER
<a href="#">LML - ADM List 1</a>	ACTIVE	MEMBER
<a href="#">LML - ADM List 6</a>	ACTIVE	MEMBER

Items that require completion

Requests awaiting approval

Specialised lists created and/or managed by the user

## Navigation

- 1 Navigation options (for moving forward and backward between pages) are displayed in the left-hand menu, and at the bottom of each page in the page navigation bar.



- 2 For accessibility reasons, the LMS uses the page navigation bar wherever the number of people (members) or lists displayed is greater than 15.

- 3 Select the page numbers on the navigation bar or select:



To progress to the next page.



To go back to the previous page.

## Dashboard menu

The menu is displayed on the left-hand side of the dashboard, and is accessible from all pages within the LMS. Function options of the menu include:

- Create a new list with **New List**
- Search for an existing list with **Search**
- Complete a support request or source contact information for assistance with **Contact Us**

Additional menu options are available to users with higher access levels or roles in the system, e.g. System Admin users. The options include:

- Persons
- Reports
- Help test
- Audit log
- Target systems page information

## System information

The **system information** section is located at the top of the dashboard page and displays information regarding:

- System availability or outages
- Relevant changes to the system
- Target system updates

## Action items

The action items section displays outstanding requests related to the list/s the user is the owner and/or editor of. Action items may include requests for:

- Addition of membership
- Removal of membership
- Increasing list thresholds

Action items and requests must be approved or denied by the list owner or editor. A request is automatically removed from action items once it has been approved or denied. The requestor will be notified via email. When a request is denied, the list owner/editor will be prompted to provide a reason which will then be included in the notification email to the requestor.

**Note:** Add membership requests can only be approved if the maximum threshold for the list has not been reached.

- To approve a request (action item), select the **thumbs up icon**
- To deny a request (action item), select the **thumbs down icon** and enter a reason for denying the request.
- Select **Save** to confirm the request and return to the dashboard.

## Pending requests

Requests that have been raised by the user and are awaiting approval/denial by the list owner or editor will display in the **Pending requests** section. Pending requests may include requests for:

- addition of membership
- removal of membership, or
- increasing list thresholds.

A pending request can be cancelled if required and will be removed from the dashboard when cancelled.

Select the ✕ to the right of the request to cancel it.

## My lists

If a user is the owner, editor or a member of a list, it is included in the **My lists** section. Lists are displayed in order of responsibility (or role) i.e. in order of owner, editor, then member.

Depending on the role of the user, this section provides the ability to:

- View list information (List management page)
- Edit list information (manage list members and target systems)
- Export the list (to Microsoft Excel)

- Copy list information to another list (clone)
- Request to be removed (as a member) from a list

**Note:** Only the list owner or editor has the ability to edit the list.

To view list information:

- Select the **list name** (red, underlined text) to open the **list management page**.

To edit list information:

- Select the **pencil and paper icon** to right of the list name to open the **list properties page**. Make changes as required, then select the **Save list and view** button.


It may be useful to copy a list's membership to another list. To do this:

- Select the **double pages icon** to the right of the list name to open the **Clone list** page. Type a name, expiration date and description for the list as required. Then select **Create list and view**.

A list can be exported from the LMS to Microsoft Excel. Exported information includes membership details i.e. sNumbers and names. To do this:

- Select the **yellow arrow above a disc icon** to the right of the list name, which will open the **file download dialog box**. Select **Open** to launch the file in Microsoft Excel or select **Save** to save the file.

A member of a list can request that membership be removed. The request is displayed in the **pending requests** section of the dashboard and will be submitted to the list owner and/or editor for approval. To do this:

- Select the  **orange person icon** to the right of the list name to open the request form. Enter a reason why membership should be removed.
- Select **Save** to submit the request.