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Member Lists

Overview of Member Lists

A member list is a collection of people that share one or more routes. Typically, member lists comprise people in the same department or people working in the same project team.

Any user can create a member list, which comprises:

- name of the member list
- whether the list is personal or enterprise in scope
- the owning organization

You assign member lists to a route when creating the route. Member lists can have either a Personal scope (available only to the user who created it) or an Enterprise scope (available to the organization assigned to it).

Viewing a List of Member Lists

Only users having a company representative role can view all member lists. All other users can view only their own member lists and Entrprise lists they belong to.

To view member lists

1. Click **My Desk** > **Team** > **Member Lists**.

The Member Lists page displays the member lists created by the user who logged in, and additionally displays the Enterprise scope member lists to which the user has access.

For each member list, the page shows:

Name—The name of the member list. If the owner chose autoname when creating the list, the name contains a prefix and a number. To see details about a list, click its Name.

Description—The description the owner entered for the list.

State—Inactive or Active. Inactive means the list can no longer be used. Active means the list is usable.

Scope—The scope is either Personal (available only to the user who created the list) or Enterprise (available to other users).

Owner—The person who created the list.

Organization—The company or business unit to which the member list applies.

2. Work with the member lists as needed:
   - To view information about a member list, click its **Name**. See ***Viewing Information for a Member List***.
   - To create a new member list, Click **Create New** from the page Actions menu. See ????????
   - To delete member lists from the database, click the check box for each list you want to delete and then click the Actions menu and select **Delete**. To select all member lists, click the check box in the column heading.

     A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Viewing Information for a Member List

The Member List Properties page shows details about the member list and provides access to the list's lifecycle and members.

To view information for a member list

1. Click **My Desk** > **Team** > **Member Lists**.

   The Member Lists page opens.

2. From the list of member lists, click the highlighted link in the Name column of the list you want to view, or click at the end of the row to view the Properties page in a new browser window.

   The category list for the member list opens in the left frame and the Properties page opens in the right frame, showing details about the list. All fields are read-only.

   The Member List Properties page contains details entered when the member list was created or modified. For details on specific fields, see ***Creating Member Lists***.

3. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Member List***.

4. Use the category list to view additional information about the member list:

Category	Description	For details, see:
Lifecycle	????????	
Members	Lists the members in the list.	

Editing Details About a Member List

A user can edit the details of their own member lists (having a Personal scope). Only users assigned as company representative can edit Enterprise scope lists.

To edit details about a member list

1. Click **My Desk** > **Team** > **Member Lists**.

   The Member Lists page opens.

2. From the list of member lists, click the highlighted link in the Name column of the list you want to view, or click at the end of the row to view the Properties page in a new browser window.

   The category list for the member list opens in the left frame and the Properties page opens in the right frame, showing details about the list. All fields are read-only.

3. From the Properties page, click **Edit Details** from the page Actions menu.

4. Use the Edit Member List Details page to make changes. For details on specific fields, see ***Creating Member Lists.***

5. When you have modified all necessary fields, click **Done**.

Creating Member Lists

This section contains instructions for creating member lists and assigning people to a member list.

A user having the company representative role can create member lists having an Enterprise scope, meaning the member list is available to other users. Any user can create a member list having a Personal scope, meaning the member list is available only to the user who created the list.

Creating a member list involves two pages:

1. Create Member List

2. Add Members

To create a Member List

1. Click **My Desk** > **Team** > **Member Lists**. Then click **Create New** from the page Actions menu.

   Or

   Click **Actions** > **Team** > **Create Member List**

   The Create Member List page opens.

2. Enter details about the member list, including the following:

   Name. Name of the member list. Required. Check **AutoName** if you want the system to generate the name.

   Description. Type a description of the member list.

   Scope. Select **Personal** if this is a list only available to the user. Users having the company representative role can create **Enterprise** scope lists, which are available to a particular organization.

   Owning Organization. Required for an Enterprise List. Select the company or business unit that can use this member list.

3. Click Next.

   The Add Members page opens.

4. Click **Add Members** to select members for the list.
5. To remove a member from the list, check the box next to the member name and click **Remove Selected**.
6. When finished, click **Done**.