

Creating Custom Person List

It is often useful to define Custom Person Lists where the Persons displayed can be filtered based on certain criteria, with control over what information (i.e. the fields of data) are displayed. Any number of these 'Custom' lists can be created that can be available for all organisation users, or for a single user.

The **Customer Person List Management** screen displays a list of the current Custom Person Lists.

By default, lists are displayed that can be **accessed by all users** (designated with an Owner of **ALL**), **and by the current user** (designated with an Owner of the user name).

To maintain lists owned by other users, check the **Show lists from all owners** checkbox. This function is only available to users with PERSON MANAGER rights. These lists can be deleted, but not modified.

Custom Person List Management ?

☐ Show lists from all owners

TITLE	DESCRIPTION	FILTER	LAST UPDATED	OWNER			
All Members	Used for LMS integration project	NONE	12/07/2015 4:15PM	ALL			
Heritage field	for Netball SA coaches who identify as indigenous	coach	8/09/2015 11:25AM	ALL			
Umpire Role		Umpire Role Filter	6/09/2016 10:32AM	ALL			

Add a new Custom Person List

1. On the **Customer Person List Management** screen, click the **Add New Custom List** Link to display the Custom Person List Maintenance screen.
2. Add the new custom list according to the table below for **Edit a Custom Person List**.
3. Click the **Save List** button to save changes.

Edit a Custom Person List

Custom Person List Maintenance ?

[← Back to Custom List Manager](#)

Custom List Title

*

Custom List Description

Person Filter

No filter

▼

Output Fields

Also show:

☐ Custom fields (*)

☐ Player fields (**)

☐ Umpire fields (***)

Address1

Address2

Address3

Birth Country

Country

Date Created

Date of Birth

→

←

ID

Full Name

Rows per page

20

Sorting

☒ Auto

☐ Custom...

Available to:

☒ All users for this club/assoc

☐ Logged in user only

Save List

- Click the **Edit** link of the list to be edited. The **Custom Person List Maintenance** screen opens.
- Edit the fields according to the table below.
- Click the **Save List** button to save changes.

 Lists owned by other users cannot be edited.

Title	This will be the name used to identify the List from the administration menu.
Description	Enter a description for the list. This is only displayed on the <i>Custom Person List Management</i> screen to further describe the List
Person Filter	Optionally, select a <i>Person Filter</i> which has previously be created. If a filter is applied, this will reduce (filter) the number of persons displayed in the list according to the criteria specified in the filter. If a filter is not applied, it is equivalent from selecting those with any role within your organisation.

Output fields	Select one or more Output fields by clicking the field name in the Available Fields list, and clicking the Add -> button. Fields can be removed by clicking the field name in the Chosen Fields list, and clicking the Remove -> button. These selections affect which fields (data columns) appear in the Custom List. Click the Move Up or Move Down buttons to determine the order in which the columns will appear in the list, however, any custom fields selected will always display as the last columns of the custom list.  There is a limit of 20 columns that can be added to a custom list.  Click one or more of options to display extra fields in the Available Fields list: • Custom Fields as defined by the current organisation or by a parent organisation. • Player Fields - these are certain fields that apply specifically to player roles.  If selecting Registration fields, you must apply a Player Filter to the Custom List that selects the applicable association the players are registered to, otherwise these fields will not display in the list • Match Official (Umpire/referee) Fields - these are certain fields that apply specifically to umpire(referee) roles.
Rows per page	Enter the Rows per page from 10 to 100. If more records than this figure appear in your list, they will be split into pages of this size. A small figure means more pages, but each page will load more quickly. Large page sizes may mean slow load/response times.
Sorting	Select the Sorting type: • Auto: Means that each column in the list can be sorted by clicking the column heading when accessing the list. Only a 'primary' sort is possible using this method, i.e. secondary sort columns (to apply for equal values in the primary column) cannot be specified. • Manual: Select which columns to sort on. The list will first be sorted on the Primary column, then the Secondary and Tertiary columns. The sort order cannot be changed when accessing the list using this method (i.e. column headings will not be able to be selected for sorting).
Available to	Select an Available to option: ALL means all users from your club can access the list, Logged in user means the current user only.

Delete a Custom Person List

- On the **Customer Person List Management** screen, click the **Delete** Link of the filter to be deleted.
- Click **OK** to confirm.

View a Custom Person List

- On the **Customer Person List Management** screen, click the **View** Link of the filter to be viewed. The actual list will be displayed.