

CA MSIX User Guide 3.0

Using the MSIX Functionality ‘My Lists’

MSIX Functionality ‘My Lists’

Introduction: The MSIX Functionality ‘My Lists’ is one of the newest features that was launched in August 30, 2020 to create one or more new list(s) for student records. The ‘My Lists’ functionality can be found on the MSIX navigation menu. Within the ‘My Lists’ page you find some features including Create New List, Send Multi-Move Notice, Export and Share My Lists.

My Lists allows MSIX users to create, share and manage lists of student records within MSIX and is accessed via the “My Lists” link from the left-side navigation menu. Every MSIX user starts with one list called “My Default List” to add student records and this list cannot be deleted or renamed. MSIX users can create new lists, as they please. List names may be up to 60 characters long and have unlimited number of Lists.

In this section, the topics discussed include:

- Create New List
- Edit or Delete List
- Add Student Record to List
- Edit or Remove Student Record on List
- Export Lists
- Share My Lists

This user guide walks you through the process of creating a new list, multi-move notice, export and share features.

Creating a New List

Some examples to use ‘My Lists’:

- Geographic Lists (by a school, project, district, state, region, etc.)
- Unique Circumstances (e.g., Priority for Service, Special Education, etc.)
- Family Lists
- Recruiter Visit Schedule (Monday Visits, etc.)
- Student Mobility (Arrivals/Departures)

Some important considerations for using ‘My Lists’:

- A list that has not been updated in 15 months will expire.
- Any action taken on an individual list will not affect other lists.
- Users can create up to 60 different lists.
- List names cannot exceed 50 characters.
- When the Data Administrator executes student record merges or deletion, this could affect the children on your lists.

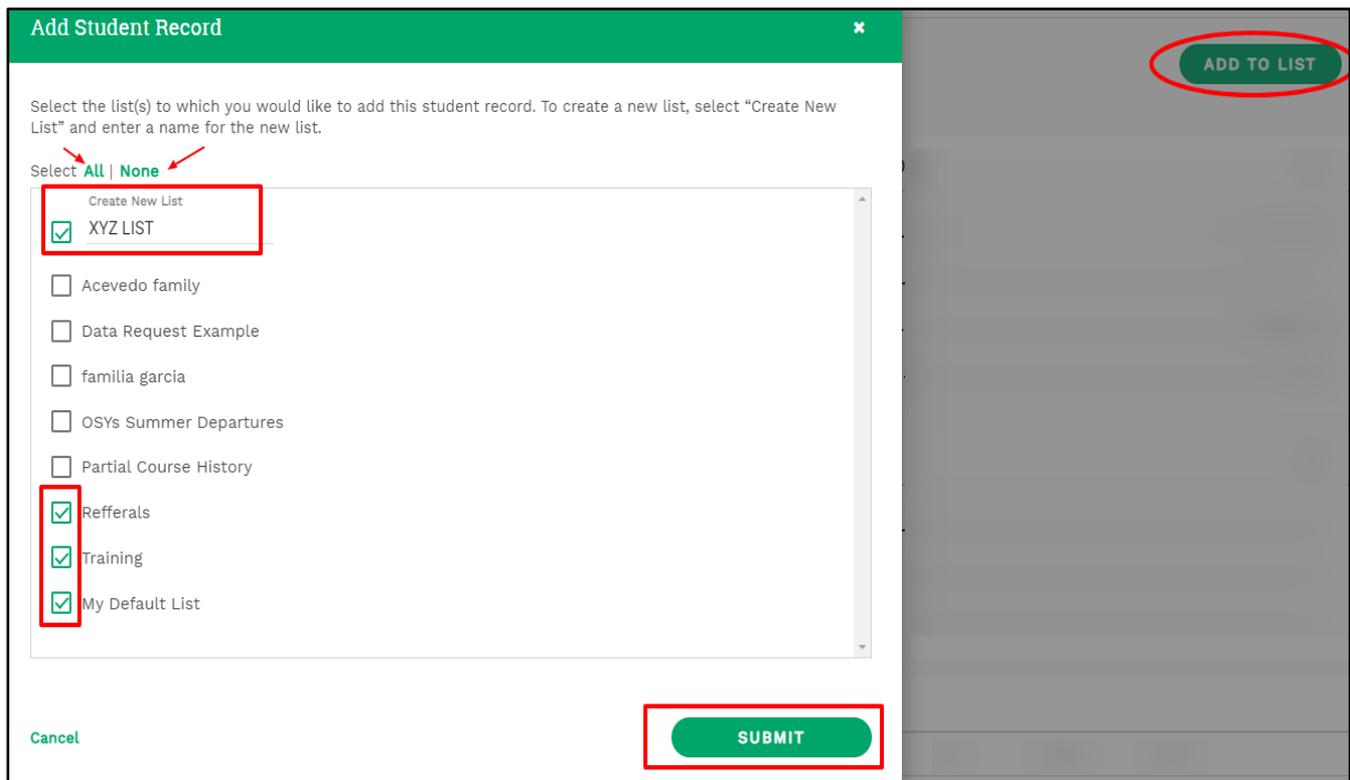
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Figure 1.0- Locate the navigation menu on the left side of the MSIX webpage to select the 'My Lists' page. Search for the student that you want to add to a list. A list can be created before searching a student record or after.



The screenshot shows the 'Student Record Search' form. It includes a search bar with 'First Name' and 'Last Name' fields, a 'Date of Birth' section with 'MM', 'DD', and 'YYYY' input boxes, and an 'ID (MSIX, State, or Alternative)' field. There are radio buttons for 'ID Type' with options 'MSIX', 'State', and 'Alternate'. A 'SEARCH' button is located at the bottom right. A 'Clear' link is in the top right corner. A red box highlights the search input fields, and another red box highlights the 'SEARCH' button.

Figure 1.2- Click on the button ADD TO LIST to select a list(s) or create a new one. Select one or more lists to add the student record and click submit.



The screenshot shows the 'Add Student Record' dialog box. It contains a list of lists to select from, with a 'Create New List' option at the top. The 'All' and 'None' selection options are highlighted with red arrows. The 'XYZ LIST' option is checked and highlighted with a red box. Other checked options include 'Refferals', 'Training', and 'My Default List'. A 'SUBMIT' button is highlighted with a red box at the bottom right. A red oval highlights the 'ADD TO LIST' button in the top right corner of the dialog box.

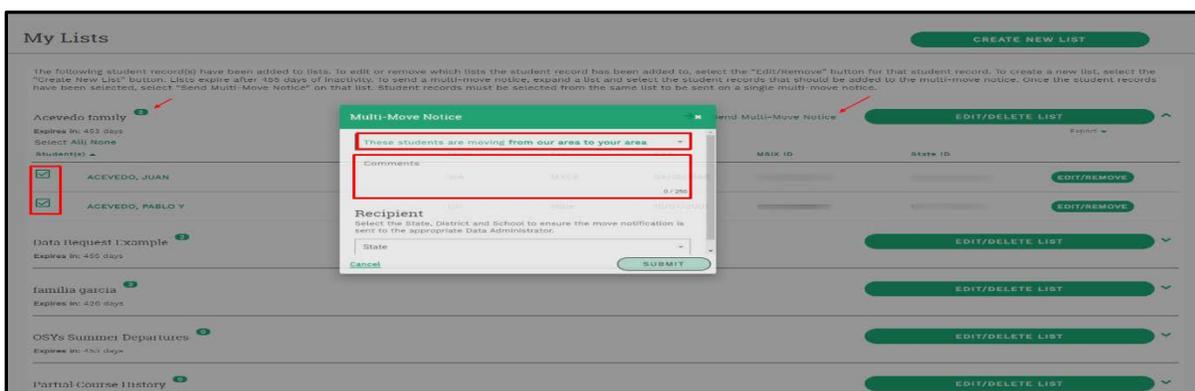
Send Multi-Move Notice

Figure 1.3- Each list has an Edit/Delete List button to change the title of the list or delete it. Also, each student record has an Edit/Remove button to move the student record to another list or remove it from a current list.



To send a multi-move notice, expand a list and select the student records that should be added to the multi-move notice. Once the student records have been selected, select “Send Multi-Move Notice” on that list. Student records must be selected from the same list to be sent on a single multi-move notice.

Figure 1.4- Select the list that has the student records intended to send a multi-move notice. Select the student records that will go to the multi-move notice and click over the feature ‘Send Multi-Move Notice’. A Multi-Move Notice prompt should appear. Select if the students are moving from or to your area. Leave a comment and select the recipient before clicking on the submit button.



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Export

Figure 1.5- Each list has an export feature found below the Edit/Delete button. First, expand the list, then click the export feature which gives a CSV format. Click the CSV option to download an excel spreadsheet that contains the student record information on that specific list selected.



For Review:

Steps to export the contents of a list to a CSV file (Desktop/Laptop PC only)

1. Click the “My Saved Lists” link in the navigation menu which will take you to the “My Saved List” page.
2. Find the list you want to export on the “My Saved List” page.
3. Expand the list by clicking the caret on the right.
4. Click the Export link that becomes visible when the list is expanded.
5. Click the icon for CSV.
6. Select a location to save the file to on your computer.

Share My Lists

MSIX users can now share lists of saved children with other users within the MSIX system. When a list is shared with another user, an email notification is sent. The receiving user will find the list in the “Shared with Me” (see Figure 1.5) section on My Lists. Users can see the name of the list, who it was sent by, when it was sent, as well as comments from the sender. Users then have the option to accept or delete the list. When the list has been accepted or deleted the user that sent the list will receive an email notification.

Available to User Role(s)

- MSIX Secondary Users
- Regional Data Administrators
- State Data Administrators

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Figure 1.6- New added features 'Share' and 'Share With Me'.

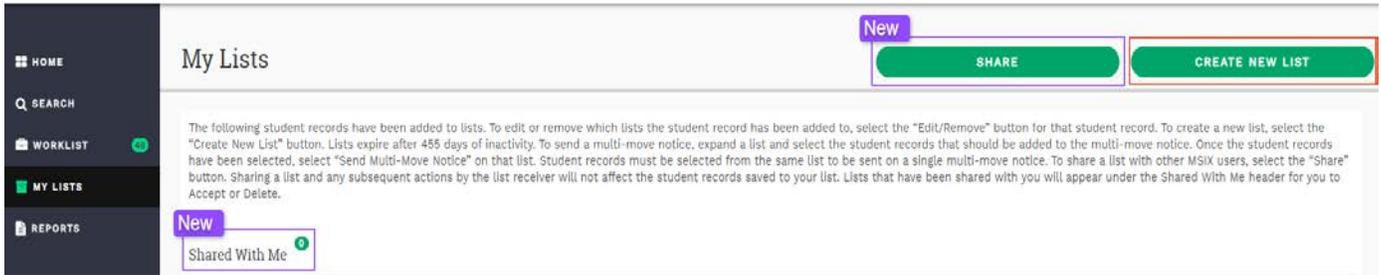
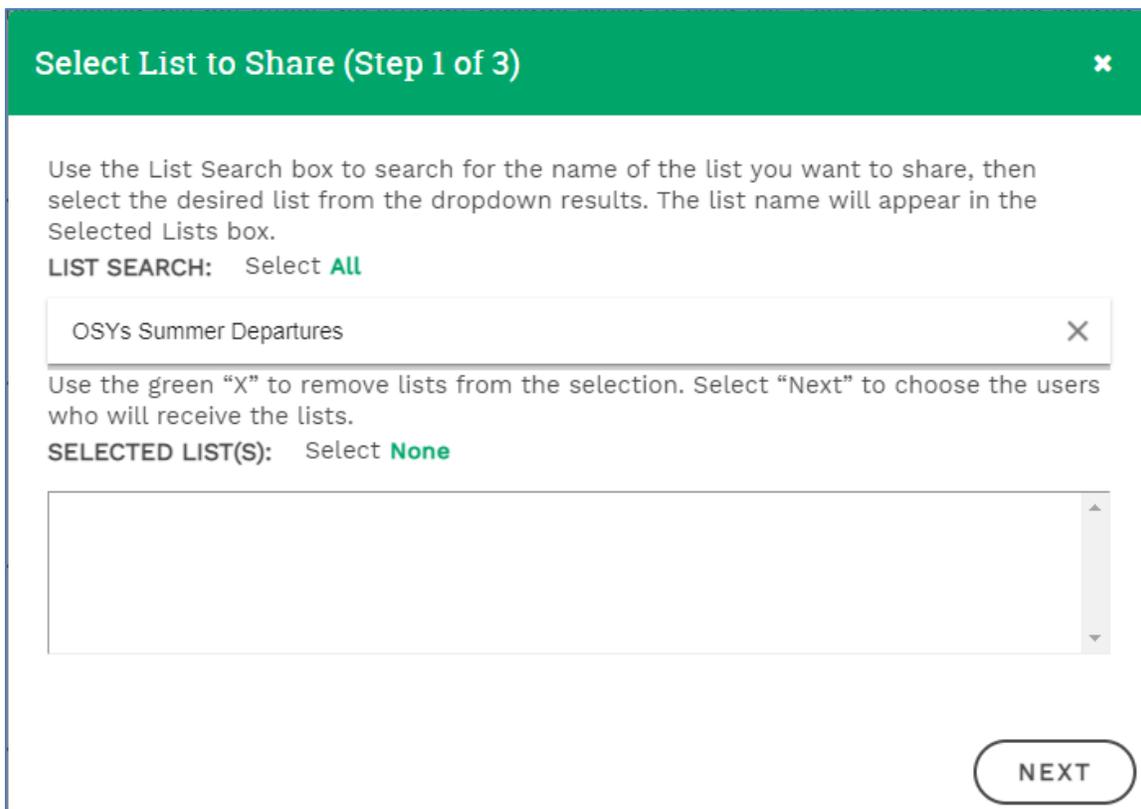


Figure 1.7i- Select List to Share (Step 1 of 3), which includes the List Search and will prepopulate with all your existing lists. Typing into the field will filter the available options to the ones that match the characters entered. You can also scroll through the list to select the lists without typing. The Next button is disable until a list is selected.



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Figure 1.7ii- Select User(s) by selecting from the User Search field (Step 2 of 3). Selecting 'x' will remove the user from the Selected User(s) field. The Review button will be enabled once at least one user is added to the Selected User(s) field.

Select Users to Share List With (Step 2 of 3)

Search for the users who will receive the lists using their username, first name, last name, or email. Select the desired users from the dropdown results. The users will appear in the Selected Users box.

USER SEARCH:

Use the green "X" to remove users from the selection. Select "Review" to to view the Share Lists Summary and verify your selected lists and users.

SELECTED USER(S): Select None

X S econdaryor05 [OR; dboland@aemcorp.com.17; secondaryor05]

Back

Click

REVIEW

Figure 1.7iii- Share Lists Summary (Step 3 of 3) which includes three fields. Review the fields and as an option you can add a comment in the appropriate field. Comments are limited to 250 characters and will be saved if the Back link is selected. Click the Submit button to share the lists.

Share Lists Summary (Step 3 of 3)

Verify the selected lists and users. Use the green "X" to remove list or user from the selections. Enter an optional comment to provide additional information regarding the shared lists. Select "Submit" to share the lists. The users will receive an email notification of the shared lists and be prompted to accept or delete the list on their My Lists page.

You are sharing the following list(s):

X OSYs Summer Departures

With the following users(s):

X S econdaryor05 [OR; dboland@aemcorp.com.17; secondaryor05]

Add a comment below

Type here

Back

Type

SUBMIT

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Figure 1.7iv- Displays what the user received from the sender their list (see figure 1.7ii) found in Share With Me section. The row in which the lists that's shared includes the list name, the MSIX User the list was sent by, the date the list was sent and any comments from the sender.

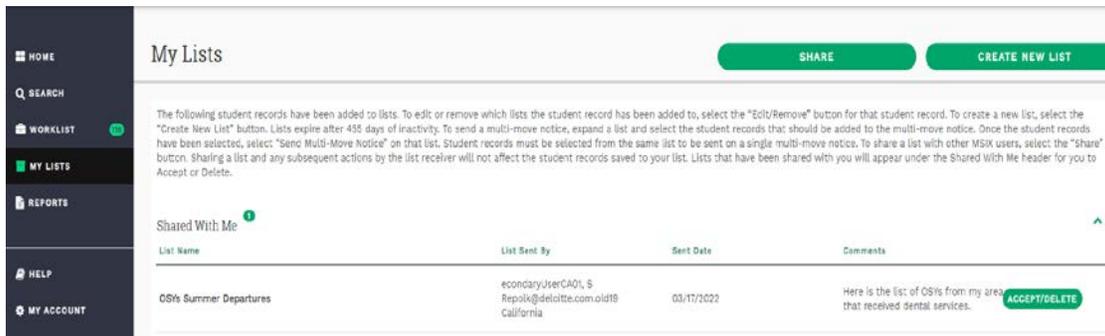


Figure 1.7vi- Displays the Accept/Delete List modal window, after you click the Accept/Delete button next to the list on right side, it enables by default (see Figure 1.7iii).

The modal window is titled 'Accept/Delete List' and has a close button (X) in the top right. The text inside reads: 'Edit the name of this list by entering a new list name in the "List Name" field. Delete this list by selecting "Delete List". Any action on this list will only affect this list.'

Below the text is a text input field with the label 'List Name' and the value 'OSYs Summer Departures'. Below the field is a checkbox labeled 'Delete List' which is currently unchecked. At the bottom left is a 'Cancel' button and at the bottom right is a 'SUBMIT' button.

Steps to Accept a Shared List

1. Click the **Accept/Delete** button next to a list.
2. If the list name matches one of your existing lists, a red notification will appear below the **List Name** field, stating List name already exists. Enter a different name, and the **Submit** button will not be enabled. If needed, update the list name to an unused name.
3. Click the **Submit** button.
4. The **Accept/Delete List** modal window will close, and a list will be created and added to your My Lists with the name entered in the List Name field.
5. The shared list will disappear from the **Shared With Me** section, and the number in the green notification bubble will decrease by 1.
6. An email notification will be sent to the user who shared the list indicating that the list was accepted.

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Steps to Delete a Shared List

1. Same steps from 1 to 3 when accepting a shared list.
2. If it is determined a shared list should not be accepted, check the **Delete** List checkbox on the **Accept/Delete List** modal window.
3. The **List Name** field will become disabled, and the name will revert to the original list name, if any changes were made while this window was open. The following message will appear beneath the checkbox: Selecting **Delete List** will permanently delete this list. This action cannot be undone.
4. Click the **Submit** button.
5. The **Accept/Delete List** modal window will close, and a list will not be created or added to your My Lists.
6. The shared list will disappear from the **Shared With Me** section and the green notification bubble will decrease by 1.
7. An email notification will be sent to the user who shared the list indicating that the list was deleted.