HARVARD
ALUMNI ASSOCIATION

COLLEGE ALUMNI PROGRAMS

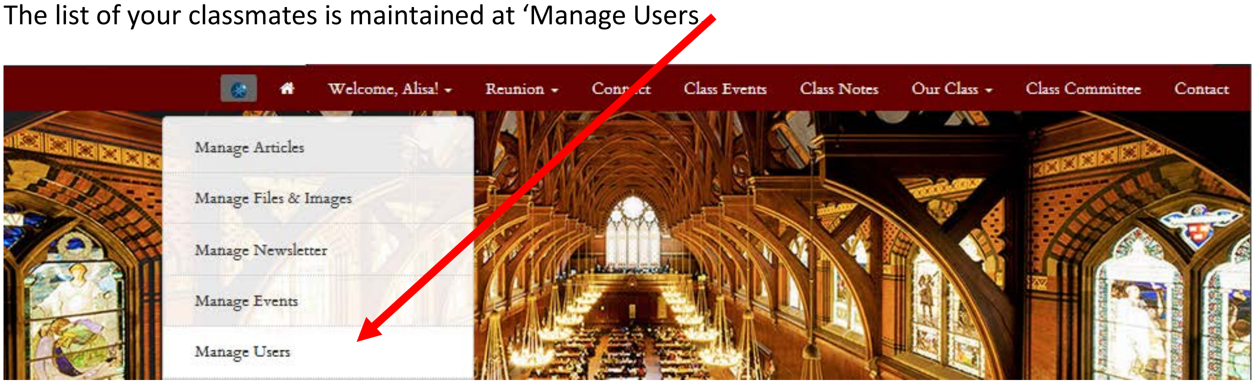
# Class Site Administrator Manual

## Contents



## Manage Users

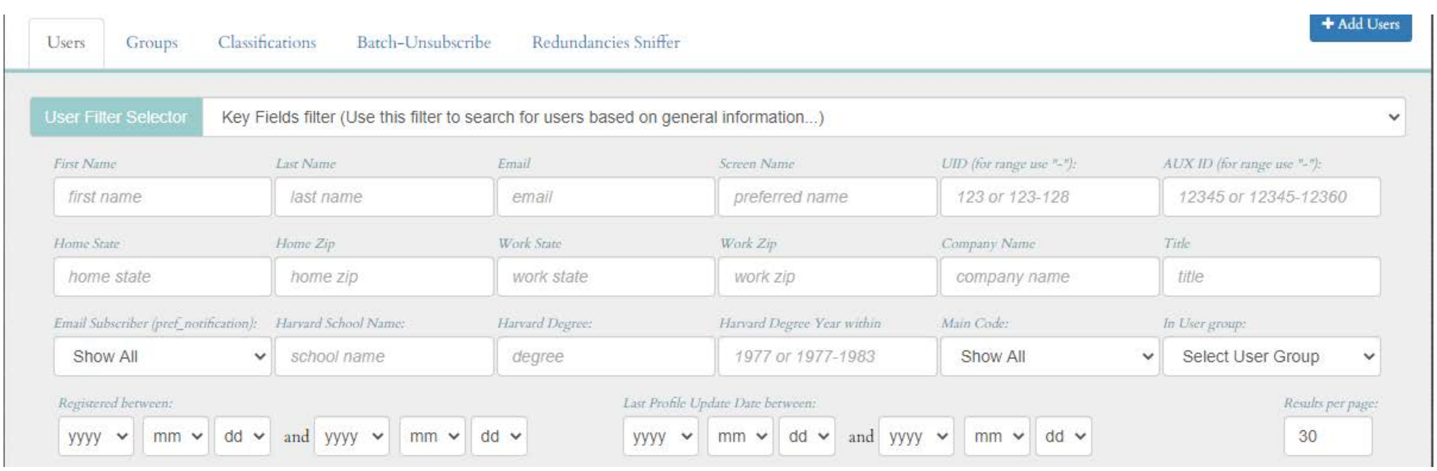
The list of your classmates is maintained at 'Manage Users'



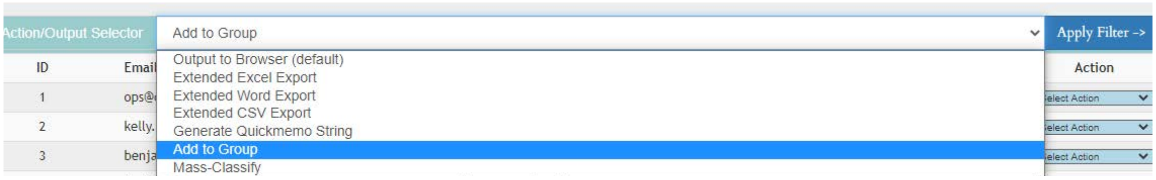

The full list of current email addresses that Harvard has on file was loaded at the time of your site launch. As updates come into Harvard, they are synced to your Class Site on a daily basis.

The user list is primarily used for segmenting lists for use in email (or 'Newsletter') sends. You can do outreach to the full class of opted in users, or you can segment based on a variety of information.

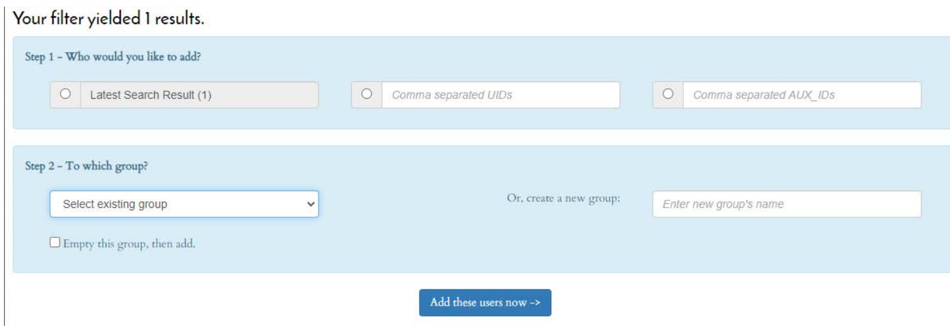
If you wish to do a simple search for things like Work State or Last Name, you can do that from the primary Users tab. Enter your criteria and then click 'Apply Filter' at the bottom of the search pane. Search results will be displayed on screen.



If you do a simple search and want to save the results to a group for email outreach, change the drop-down box next to 'Apply Filter' to 'Add to Group'.

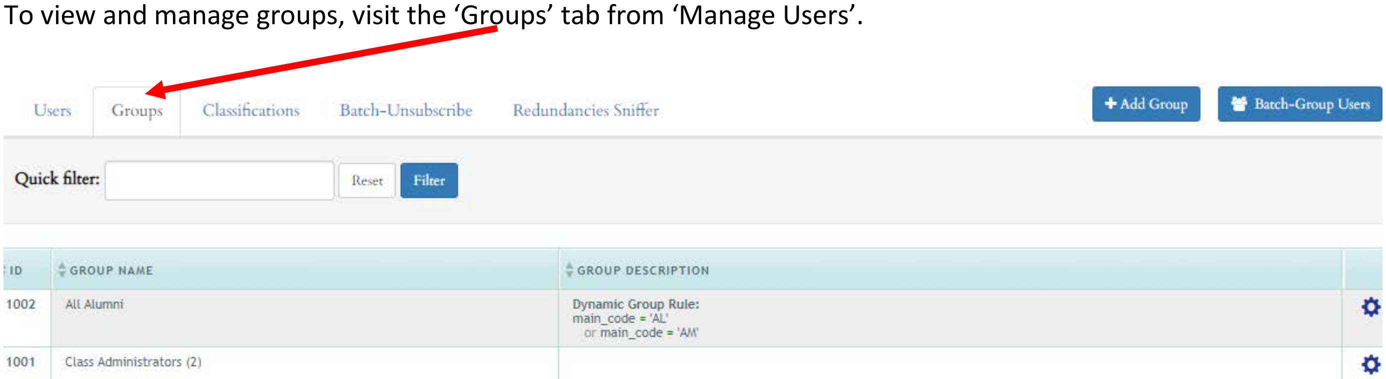



You will be given the choice to add these filter results to an existing Group, or create a new Group. If you add to an existing group, you can make the choice to empty the group before adding. Note: there are some empty existing groups (e.g. Job Board Managers) that are not relevant to Class Sites and should be ignored.




After you have made your choices, click 'Add these users now'. You will see a confirmation screen noting users have been added.

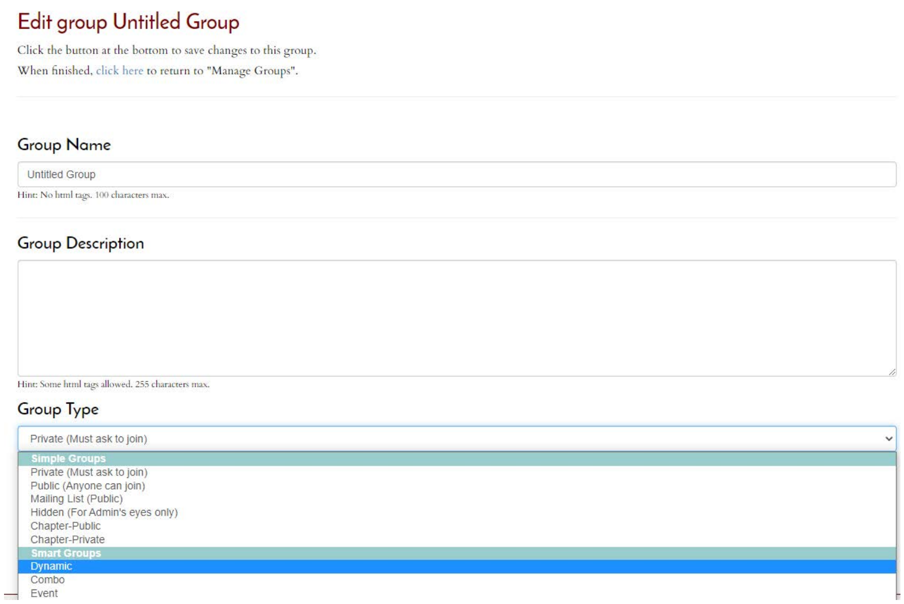
To view and manage groups, visit the 'Groups' tab from 'Manage Users'.




You have four actions you can take on an existing group:

1. View – See the users that are in that group.
2. Edit – Change the group name or group description.
3. QuickMemo – Generate an email address list for everyone in the group for personal outreach. (Remember that emails sent from personal mail clients should be limited to very small groups (<10) and that analytics are not available for messages sent from your personal email client.
4. Delete – Delete the group. Note that some groups for system use cannot be deleted.

To create groups using more complex filtering, click ‘Add Group’. On the window that opens add Group Name and Group Description. Under ‘Group Type’ select ‘Dynamic’.




A section for building a simple query appears. Enter your criteria and click ‘Save changes to this item’.


The group has been created. Click View to see who falls into this group and Edit to alter the criteria. This group will now appear as a recipient list under your ‘Manage Newsletters’.