



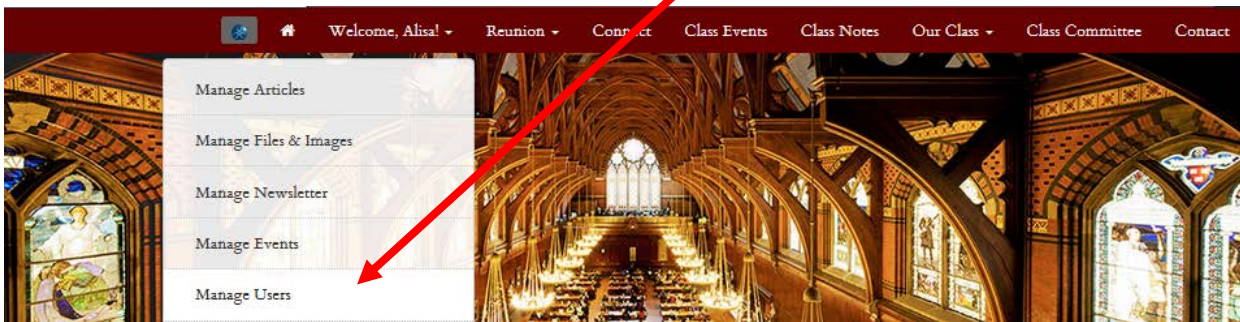
Class Site Administrator Manual

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Manage Users 1

Manage Users

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



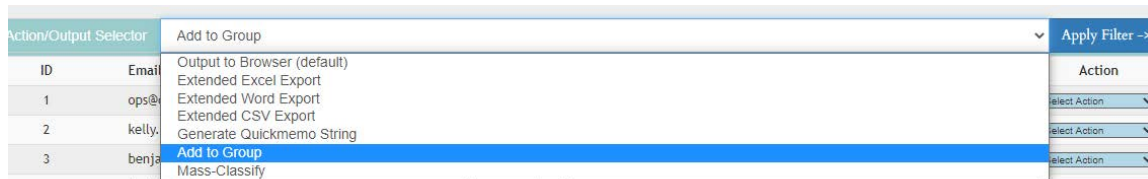
The full list of current email addresses that Harvard has on file was loaded at the time of your site launch. As updates come into Harvard, they are synced to your Class Site on a daily basis.

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.

A screenshot of the 'Manage Users' interface. At the top, there are tabs for 'Users', 'Groups', 'Classifications', 'Batch-Unsubscribe', and 'Redundancies Sniffer'. A blue '+ Add Users' button is in the top right. Below the tabs is a 'User Filter Selector' dropdown menu with the text 'Key Fields filter (Use this filter to search for users based on general information...)'. Below this are several rows of input fields for filtering users. The first row includes: 'First Name' (input: first name), 'Last Name' (input: last name), 'Email' (input: email), 'Screen Name' (input: preferred name), 'UID (for range use "-")' (input: 123 or 123-128), and 'AUX ID (for range use "-")' (input: 12345 or 12345-12360). The second row includes: 'Home State' (input: home state), 'Home Zip' (input: home zip), 'Work State' (input: work state), 'Work Zip' (input: work zip), 'Company Name' (input: company name), and 'Title' (input: title). The third row includes: 'Email Subscriber (pref_notification):' (dropdown: Show All), 'Harvard School Name:' (input: school name), 'Harvard Degree:' (input: degree), 'Harvard Degree Year within' (input: 1977 or 1977-1983), 'Main Code:' (dropdown: Show All), and 'In User group:' (dropdown: Select User Group). At the bottom, there are sections for 'Registered between:' and 'Last Profile Update Date between:', each with year, month, and day dropdowns and an 'and' separator. A 'Results per page:' dropdown is set to '30'.

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.

Your filter yielded 1 results.

Step 1 - Who would you like to add?

Latest Search Result (1)
 Comma separated UIDs
 Comma separated AUX_IDs

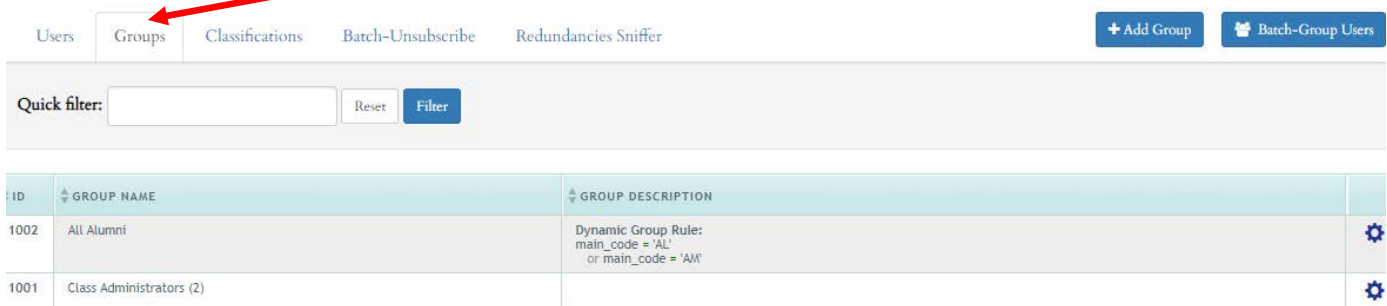
Step 2 - To which group?

Empty this group, then add.

[Add these users now ->](#)

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'.

Edit group Untitled Group

Click the button at the bottom to save changes to this group.
When finished, click [here](#) to return to "Manage Groups".

Group Name

Hint: No html tags, 100 characters max.

Group Description

Hint: Some html tags allowed, 255 characters max.

Group Type

Private (Must ask to join) ▾

Simple Groups

Private (Must ask to join)

Public (Anyone can join)

Mailing List (Public)

Hidden (For Admin's eyes only)

Chapter-Public

Chapter-Private

Smart Groups

Dynamic

Combo

Event

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

Group Type

Dynamic

	none	▾	=	▾		<i>...in plain English:</i>
AND	none	▾	=	▾		
AND	none	▾	=	▾		
AND	none	▾	=	▾		

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'.