



How to add users to a Group

There are 3 ways that you can add users to groups:

- One user at a time
- Multiple users at once
- An automatically updated list of users (Dynamic Group) based on information in the users profile.

Adding users one at a time

1. Go to “MANAGE USERS” in the admin menu.
2. Do a search for the user that you want to add to the group. You can search by any of the fields shown on the top half of the page. You can enter partial information.
3. Click on “Edit Account Info” under actions

mail	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
pa@pomimagnet.com	Magnet Team	Magnet	Team	1	1	02/01/2010 16:19	01/01/2010 23:59	Select Action
ely@pomimagnet.com	Kelly	Kelly	Messner			No Membership		Select Action
rowen@pomimagnet.com	Jared	Jared	Erown			No Membership		Select Action
kkasher@pomimagnet.com	Michael k	Michael	Kasher			No Membership		Select Action
mizrahi@pomimagnet.com	David	David	Mizrahi	1	1	08/18/2010 14:47	01/01/2012 23:59	Select Action
ps2@pomimagnet.com	Magnet Team	Magnet	Team			No Membership		Select Action
m_flynn@harvard.edu	Jen	Jen	Flynn			No Membership		Select Action
chandra_mohammed@harvard.edu	Chandra	Chandra	Mohammed	1	1	02/23/2010 00:00	05/31/2014 23:59	Select Action
	Rex	Rex	Hopper			No Membership		Edit Account Info
opdahl@verizon.net	Richard	Richard	Opdahl			No Membership		Edit Profile Info
ihkeating@earthlink.net	Howard	Howard	Keating			No Membership		Manage as User
	Robert	Robert	Kratz			No Membership		Show Order History
keapas@pacbell.net	Anthony	Anthony	Shaw	1	1	02/12/2014 15:07	02/13/2015 14:09	Details User
	Carlton	Carlton	Pitsecker			No Membership		Select Action

4. From the basic info page, you will see a list of groups under “Edit User’s Group Affiliation”.

The screenshot shows the 'Edit User's Group Affiliation' section of the user management interface. It features a list of groups with checkboxes for selection. The groups listed include:

- African-American Alumni
- All Non-Members
- Asian-American Members
- Billing Access
- Board of Directors
- Chandra's Interest Group
- Chandra's TEST Group
- Chandra's New group
- Community Service
- Current and Expired Members
- Current Members
- Current Students
- Current Expired Members
- Email Test Group - Chandra
- Entire List of SoCal Alumni
- Events Review Group
- George First Name
- Head Administrators
- Interviewers
- Job Board Managers
- Job Board Premium Recruiters (Pend/Publish)
- Job Board Recruiters (Pend only)
- Latino Alumni
- Membership Review Board
- Monthly Newsletter Group
- Orange County
- Orange County area
- Recent Graduates
- Store Updates Recipients
- Test Group
- Untitled Group

5. Select the Group(s) for that user.
6. Click “Modify Group Affiliation”.

Adding multiple people at once.

1. Go to MANAGE USERS
2. Do a search for the users that you want to add to the group.
Example: If you need a list of everyone who graduated in the last 10 years. Enter 2003–2013 in the “School 1 Grad Year within:” field.

The screenshot shows the 'Users Filter' interface with various search criteria. The 'School 1 Grad Year within:' field is set to '2003-2013'. Below the filters, there is a table of users with columns for ID, Email, Level, Status, Renewed, Expires, and Action. The 'Add to Group' option is highlighted in the dropdown menu.

ID	Email	Level	Status	Renewed	Expires	Action
1	ops@omniagnet.com			No Membership		[Delete Action]
2	kelly.rossner@omniagnet.com			No Membership		[Delete Action]
3	benjamin.stern@omniagnet.com			No Membership		[Delete Action]
4	deirah@omniagnet.com			No Membership		[Delete Action]
5	akasher@omniagnet.com	Michael	Michael	Kasher	No Membership	[Delete Action]
6	ops2@omniagnet.com	Magnet Team	Magnet	Team	No Membership	[Delete Action]
9	stroh@omniagnet.com	Shahar	Shahar	Stroh	No Membership	[Delete Action]

3. In the filter dropdown, click “Add to group” At the top of the next screen you will see the number of records that was returned.

The screenshot shows the 'Add to Group' dialog box. It displays the number of records returned (535) and provides options to either select an existing group or create a new one. There is also a checkbox to empty the group first and an 'Add these users now' button. Below the dialog, there is a 'Match case' checkbox.

Your filter yielded 535 results.

1. Which group would you like to add these folks to:

Select existing group [dropdown] or create a new one: [input]

2. Would you like to empty the group first?

Yes, empty the group first!

[Add these users now ->]

[Tips on this page...](#)

Step 1: Typing in the “new group” field will override your pull-down selection. So make sure you only use it if you actually want to create a new group!!!

Step 2: This option essentially ‘resets the group’ prior to adding the users you just filtered. If checked, the all users already belonging to this group will be deleted from it (not from the database, just the group), and then your filtered result will be added to the group. If unchecked, the system will add your filtered results to the existing group leaving existing group-members untouched.

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Match case

4. From this screen you can either add all of the records to a preexisting group (drop down) or create a new group.
5. You will also have the option of emptying the pre- existing group first.
6. Click “Add these users now”.

Dynamic Groups

Dynamic groups are used to create groups that automatically update based on profile information. Any time new alumni or users join the database – they will be added to the group automatically if their profile fits the criteria you have set. For example – if you want to run a list of all of your current members who are HBS alums before 1995. You would use a dynamic group to avoid having to manual add people to the group. Dynamic groups are always hidden and will not appear on your site/

1. Go to MANAGE USERS
2. Click on GROUPS
3. Give your new group a name and description.



The screenshot shows the 'Edit group' form. The title is 'Edit group Untitled Group'. There are instructions: 'Click the button at the bottom to save changes to this group. When finished, click here to return to "Manage Groups"'. The form has two main text areas: 'Group Name' (with a hint: 'No HTML tags, 100 characters max.') and 'Group Description' (with a hint: 'Some HTML tags allowed, 255 characters max.'). Below these is a 'Group Type' dropdown menu. The dropdown is open, showing options: Private (Must ask to join), Private (Must ask to join), Public (Anyone can join), Hidden (For Admin's eyes only), Dynamic, Chapter-public, and Chapter-private. A 'Save changes to this item ->' button is at the bottom right.

4. Choose "Dynamic" under group type.
5. 4 lines will appear below group type.

The screenshot shows the 'Edit group' form with 'Group Type' set to 'Dynamic'. Below the 'Group Type' dropdown, there are four rows of criteria fields. Each row has a dropdown for 'AND/OR' (all set to 'AND'), a dropdown for the field name (all set to 'none'), and a dropdown for the operator (all set to '='). To the right of these fields is a text input field labeled 'In plain English...'. A 'Save changes to this item ->' button is at the bottom right.

6. In each of the 4 drop downs, you can choose any profile field, including membership. Please keep in mind the "and/or" drop down. This affects who will be included in the group.
7. Click "Save changes to this item".
8. This group will be automatically updated. In the "Groups" listing it will always say (N/A) for numbers. To see the number of people in this group – click "view".