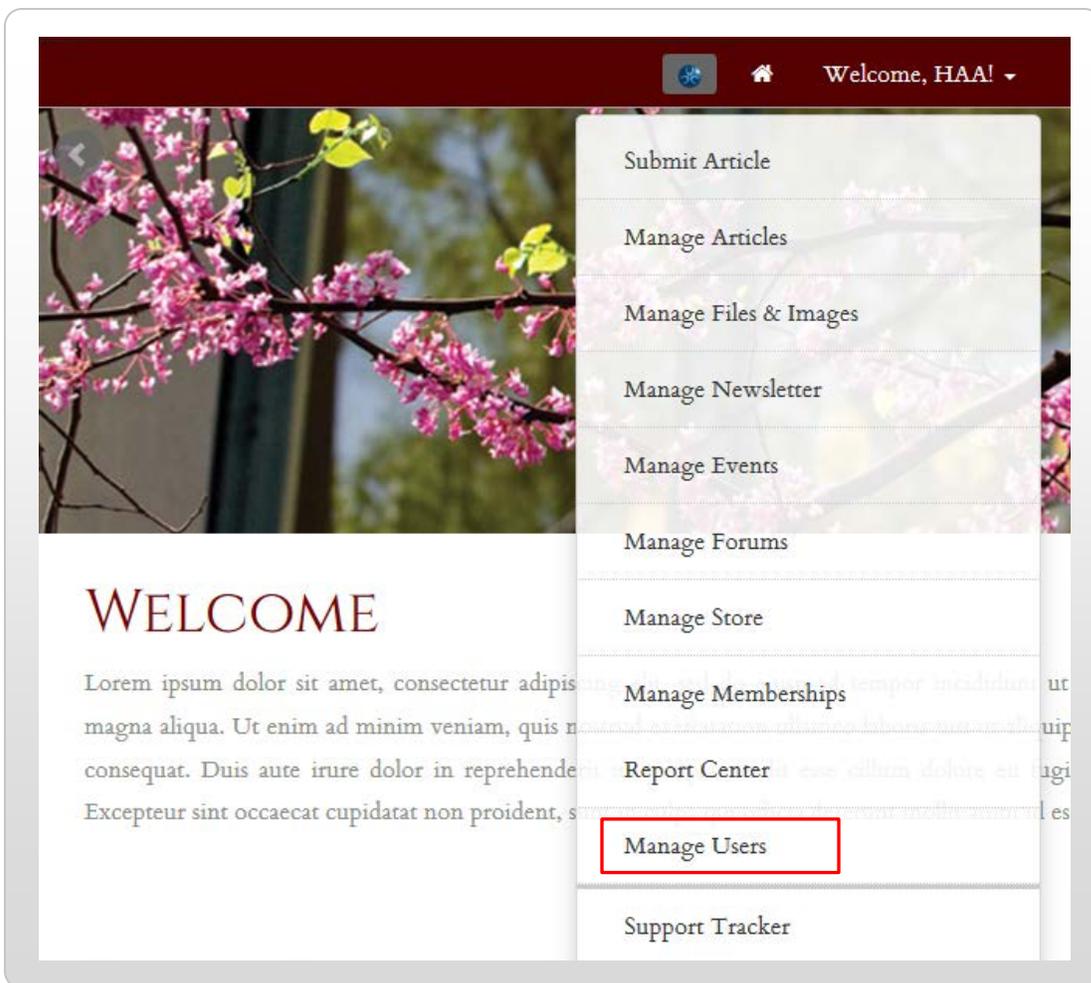


Adding Users to a Group

If your site utilizes one or more **user groups** to define email distribution lists, assign specific access privileges to particular members of your organization, etc., you may periodically need to update the contents of these groups. To do so, you can manually add users to a group one at a time, or add multiple users via batch processing—you can also create dynamic groups that self-populate based on user profile information. To find out how to use each of these methods, refer to the sections that follow.

Add a Single User to a Group

1. Click the admin menu button  and select “**Manage Users.**”



The **profile management** screen appears—from this screen, you can specify how user information is managed and organized within your site’s database (see next page for a visual representation of this screen).

- Use the search fields within the profile management screen to locate the user whom you wish to add to a group:

ID	Email	Screen Name
1	ops@omnimagnet.com	Magne
17	alumni_magnet@harvard.edu	
61	ops2@omnimagnet.com	Magne

- To perform the search, click the “**Apply Filter**” button next to the “**Output to Browser**” drop-down menu below the search fields:



Results for your search appear below the “Apply Filter” button within your web browser:

ID	Email	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
1	ops@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action
17	alumni_magnet@harvard.edu		HAA	Admin		No Membership			Select Action
61	ops2@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action

- Once you've located the user within the search results, select **"Edit Account Info"** under the **"Action"** dropdown menu to the right of the screen name and membership information:

ID	Email	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
1	ops@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action
17	alumni_magnet@harvard.edu		HAA	Admin		No Membership			Select Action
61	ops2@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action Edit Account Info Edit Profile Info Masquerade as User

Status	Renewed	Expires	Action
No Membership			Select Action
No Membership			Select Action
No Membership			Select Action Edit Account Info Edit Profile Info Masquerade as User

The **account editor screen** appears—from here, you can update information and settings associated with the user's account, including group affiliations:

Users
Groups
Classifications
Batch-Unsubscribe
Redundancies Sniffer

Edit Basic Info: Power-Edit

Screen Name: (User ID 17)
 Name: HAA Admin
 Email:
 New Password*:
**leave blank if you wish to leave current password unchanged*

Edit Membership Info:

Current Membership Level:
 User's Membership Status:
 Membership Exp. Date:

Edit User's Group Affiliation:

Billing Access
 Head Administrators
 Job Board Managers

- Navigate to the “**Group Affiliation**” section of the account editor screen and check the boxes next to the groups to which the user should have access:

Edit User's Group Affiliation:

- Billing Access
- Head Administrators
- Job Board Managers
- Job Board Premium Recruiters (Pend/Publish)
- Job Board Recruiters (Pend only)
- Membership Review Board
- New-User-Registration Notifications Recipients
- Store Updates Recipients
- Untitled Group
- Untitled Group
- Untitled Group

Modify Group Affiliation ->

When finished, click the “**Modify Group Affiliation**” button at the lower right of the section. The user is added to each of the groups you selected, and can now access the features and capabilities associated with them.

Add Multiple Users to a Group

- Access the profile management screen by selecting “**Manage Users**” from the admin menu, as shown in step 1 in the previous section.
- Use the search fields in the profile management screen to identify the set of users you would like to add to a selected group. **Note:** you can select a **range** of users by hyphenating the parameters that you enter into the search fields, as shown in the example below:

Last Name contains: Email contains:

Home Zip contains: UID (for range use "-"):

Work Zip contains: Company Name contains:

School 1 Degree contains: School 1 Grad Year within: 2001-2010

Registered between: yyyy ▾ mm ▾ dd ▾ and yyyy ▾ mm ▾ dd ▾

Last Update Date between: yyyy ▾ mm ▾ dd ▾ and yyyy ▾ mm ▾ dd ▾

Criteria 6 ▾

Criteria 7 ▾

Criteria 8 ▾

Criteria 9 ▾

Criteria 10 ▾

Criteria 15 ▾

To obtain a list of users who graduated within a specific timeframe, enter the start date and end date separated by a hyphen within the “School 1 Grad Year within” field.

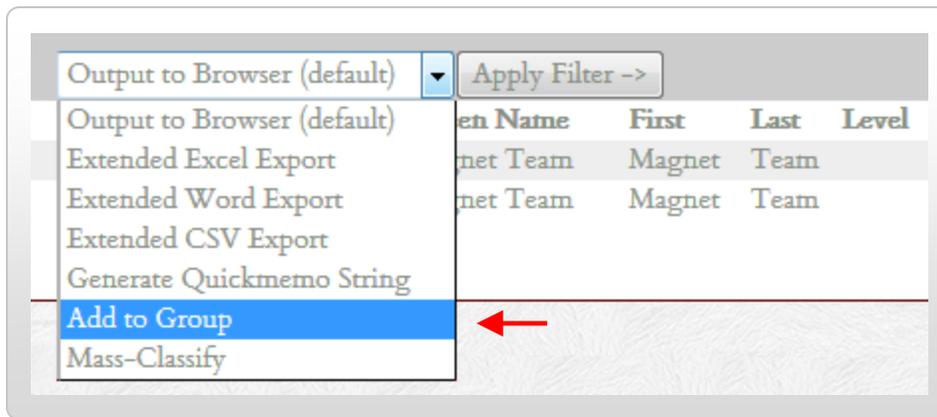
- Click the “**Apply Filter**” button as in the previous section to preview your user list (leave “**Output to Browser**” selected for now).

Output to Browser (default) ▾ **Apply Filter ->**

As in the previous section, your search results appear below the “**Apply Filter**” button in your browser window. Review your results to ensure they include the required user IDs:

ID	Email	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
1	ops@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action
17	alumni_magnet@harvard.edu		HAA	Admin		No Membership			Select Action
61	ops2@omnimagnet.com	Magnet Team	Magnet	Team		No Membership			Select Action

- Once you are satisfied with the contents of your list, select “**Add to Group**” from the drop-down menu to the left of the “**Apply Filter**” button:



The **group processing screen** appears. From here, you can add your list of users to a new or existing group:

Your filter yielded 15 results.

Step 1 - Who would you like to add?

Latest Search Result (1) Comma separated UII Comma separated AU.

Step 2 - To which group?

Select existing group: Or, create a new group:

Empty this group, then add.

5. First, complete the “**Step 1**” section of the screen by specifying which users to add to the group. You can select all the users from the search results you obtained earlier in this guide, or you can enter a list of user IDs separated by commas in one of the two remaining fields in this section:

The screenshot shows a section titled "Your filter yielded 15 results." Below it is "Step 1 - Who would you like to add?". There are three radio button options: "Latest Search Result (15)", "Comma separated UIDs", and "Comma separated AUX_IDs". Red callout boxes provide instructions: "Include all search results" points to the first option, "Include only user IDs from a specific, comma-separated list" points to the second, and "Include only AUX_IDs from a specific, comma-separated list" points to the third.



Note: If you choose to include a comma-separated list of user IDs, you do not need to select only those users represented in your search results—you can specify any set of users that exists in your site’s database. Typically, you would only use a list of **AUX_IDs** if your group includes **enterprise clients**.

6. Next, select the group to which you would like to add the specified users in the “**Step 2**” section of the screen:

The screenshot shows "Step 2 - To which group?". It features a dropdown menu labeled "Select existing group", a link "Or, create a new group:", and a text input field "Enter new group's name". There is also a checkbox labeled "Empty this group, then add."

In this section, you can either choose to add users to an existing group using the drop-down menu on the left, or create a new group based on the list of users you identified.



Note: If you check the box next to “**Empty this group, then add,**” your specified list of users will **replace** all existing users in the group. If you create a new group, it will contain **only** the set of users you selected in the “Step 1” section of this screen.

7. When ready, click the “**Add these users now**” button at the bottom of the screen. Your user group will be created using the parameters you specified in the preceding sections.

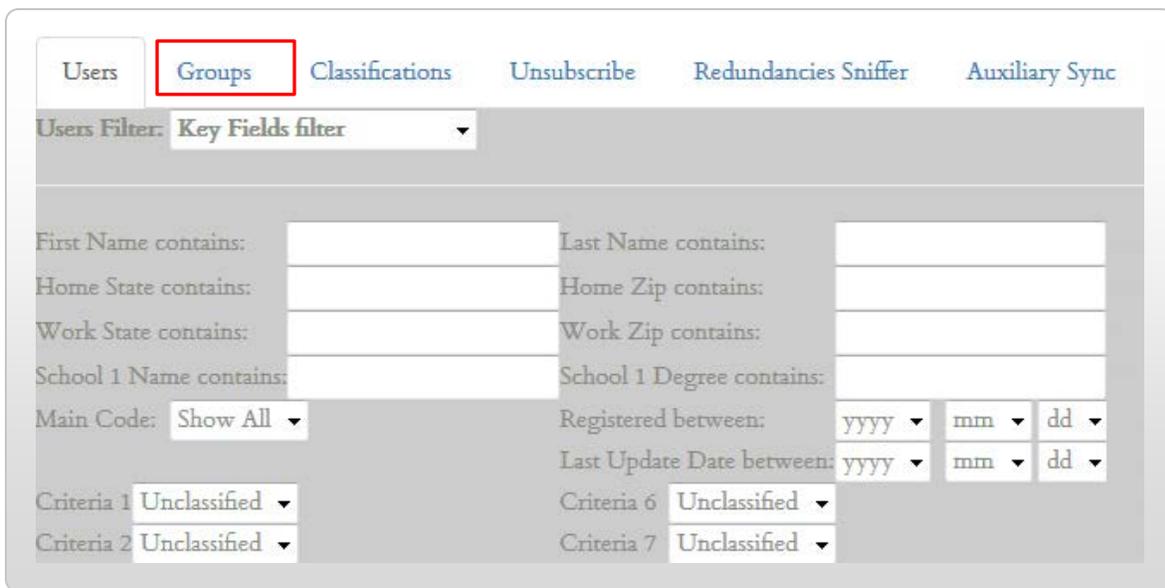
A blue button with the text "Add these users now ->" and a right-pointing arrow.

About Dynamic Groups

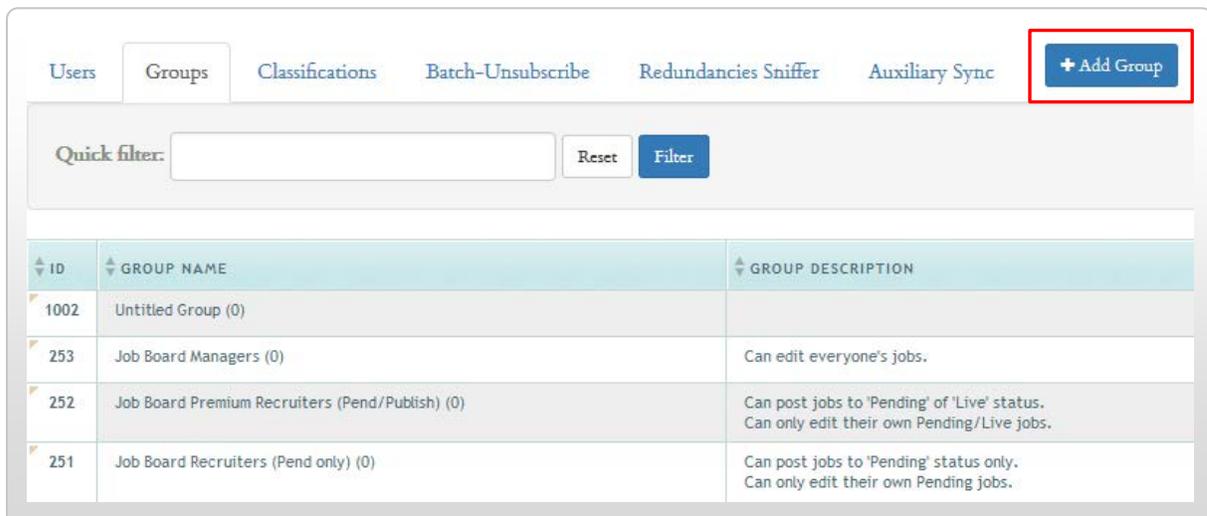
Dynamic groups self-populate based on criteria that you specify—users are automatically added to these groups according to information within their profiles. For example, if you create a dynamic group that includes only alumni who graduated prior to 1995, any user within your site’s database whose profile matches this description is added to this group by default. All dynamic groups are hidden, and do not appear anywhere on the public-facing portion of your site.

To create a dynamic group, refer to the steps in the sections that follow.

1. Click the admin menu button  and select **“Manage Users”** to access the profile management screen, as in step 1 on page 1 of this guide.
2. Click the **“Groups”** tab at the top of the screen:



The **group management** screen appears—add a new group by clicking the **“Add Group”** button at the top of the screen:



ID	GROUP NAME	GROUP DESCRIPTION
1002	Untitled Group (0)	
253	Job Board Managers (0)	Can edit everyone's jobs.
252	Job Board Premium Recruiters (Pend/Publish) (0)	Can post jobs to 'Pending' of 'Live' status. Can only edit their own Pending/Live jobs.
251	Job Board Recruiters (Pend only) (0)	Can post jobs to 'Pending' status only. Can only edit their own Pending jobs.

3. The group editor screen appears—enter a **name** and **description** for your group within the fields provided:

The screenshot shows a web interface with a navigation bar containing 'Users', 'Groups', 'Classifications', 'Unsubscribe', 'Redundancies Sniffer', and 'Auxiliary Sync'. The 'Groups' tab is active. Below the navigation bar, the text reads: 'Edit group Untitled Group', 'Click the button at the bottom to save changes to this group.', and 'When finished, [click here](#) to return to "Manage Groups".'. There are two input fields: 'Group Name' with a red arrow pointing to it and 'Group Description' also with a red arrow pointing to it. The 'Group Name' field contains 'Untitled Group' and has a hint below it: 'Hint: No html tags. 100 characters max.'.

In the drop-down menu at the bottom of the screen, choose “**Dynamic**” as the group type:

The screenshot shows a 'Group Type:' dropdown menu. The current selection is 'Private (Must ask to join)'. The dropdown is open, showing the following options: 'Private (Must ask to join)', 'Public (Anyone can join)', 'Mailing List (Public)', 'Hidden (For Admin's eyes only)', 'Dynamic' (highlighted in blue), 'Chapter-Public', and 'Chapter-Private'. A red sidebar with the text 'HARVARD AL' is visible on the left side of the dropdown.

Four new sets of drop-down menus and fields appear below the group type menu:

The screenshot shows a configuration area below the 'Group Type' dropdown. The 'Group Type' dropdown is set to 'Dynamic'. Below it, there are four rows of configuration. Each row starts with an 'AND' dropdown menu, followed by a text field containing 'none', a small dropdown menu, an equals sign, another small dropdown menu, and a larger text field.

- Use the four sets of menus to set criteria by which users will be added to the group—for example, you can select “school_1a_degree_year < 1995” and “last_name starts with A” to populate the group with users who graduated prior to 1995 and have last names beginning with the letter “A:”

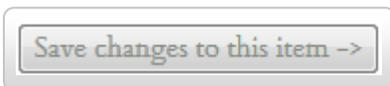
The screenshot shows a configuration interface for a dynamic group. At the top, 'Group Type' is set to 'Dynamic'. Below this, there are four rows of criteria, each with an 'AND' selector on the left. The first row has 'school_1a_degree_year' with a less-than sign (<) and the value '1995'. The second row has 'last_name' with 'starts with' and the value 'A'. The third and fourth rows are set to 'none' with an equals sign (=).

Any users (including newly registered users) whose profiles match the above parameters will be automatically added to the group.



If you select the “AND” option between sequential sets of parameters, users whose profiles match **both** sets of criteria will be added to the group. If “OR” is selected, users who match **either** of the specified sets of criteria will be included in the group. If you need to adjoin multiple “AND”/“OR” statements and are unsure of the logic to use, post a question to [Support Tracker](#) for assistance.

- Click the “Save changes to this item” button at the lower right of your screen:



Your group is created, and self-populates with users in your database whose profiles match the criteria you specified. If/when new users fitting these parameters register for an account through your site, they will also be automatically added to this group.

- To view or edit settings for your group, access the **group management screen** as shown on page 7 of this guide. Your dynamic group appears within the full listing of groups for your site:

ID	GROUP NAME	GROUP DESCRIPTION	
1003	My Example Group (n/a)	Example Description	
1000	Untitled Group (0)		
253	Job Board Managers (0)	Can edit everyone's jobs.	

Since your group is a **dynamic** group, the number of users within it is listed as “n/a” in parentheses to the right of its name. To view the group’s user count and/or edit its settings, click the **gear icon**  next to its name and select one of the options shown:

ID	GROUP NAME	GROUP DESCRIPTION	
1003	My Example Group (n/a) 	Example Description	
1000	Untitled Group (0)		<ul style="list-style-type: none">ViewEditQuickMemoDelete
253	Job Board Managers (0)	Can edit everyone's jobs	
252	Job Board Premium Recruiters (Pend/Publish) (0)	Can post jobs to 'PENDING' Can only edit their own jobs.	
251	Job Board Recruiters (Pend only) (0)	Can post jobs to 'PENDING' Can only edit their own	
201	Billing Access (4)		
100			



Questions on this guide? Please post any questions to [Support Tracker](#) and the AlumniMagnet team will respond as soon as possible.