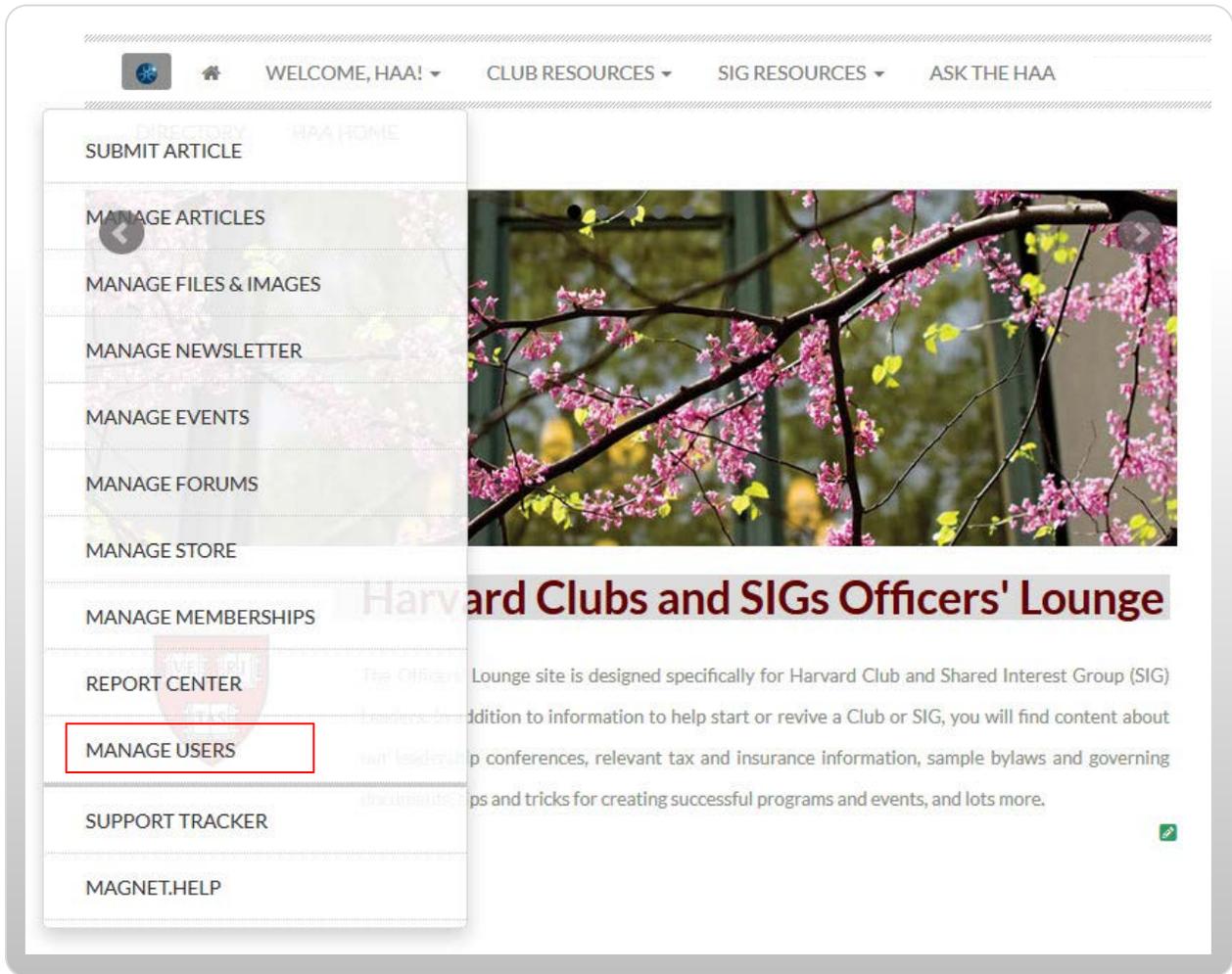




Downloading a Membership List

The HAA web content management system enables you to download lists of current and former members of your Harvard Club or Shared Interest Group (SIG) based on parameters that you specify (for example, you could generate a listing of all individuals who were members from 2005–2010). To download a customized membership listing for your organization, follow the steps below.

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



The **Manage Users** page appears (see next page for screen shot). This page enables you to search for and/or update information associated with specific users of your site.

Figure 1: The Manage Users Page

The Users Filter menu allows you to search for and sort users of your site based on attributes that you specify.

Enter values such as names and email addresses in the User Fields section to filter users by their identifying information.

Click the **Apply Filter** button to display a list of users filtered by the parameters specified in the fields above.

ID	Email	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
1	ops@omnimagnet.com	Magnet	Magnet	Team	No	Membership			Select Action
2	ops3@omnimagnet.com				No	Membership			Select Action
3	jbrown@omnimagnet.com				No	Membership			Select Action
4	mkasher@omnimagnet.com				No	Membership			Select Action
5	dmlzrahi@omnimagnet.com				No	Membership			Select Action
6	ops2@omnimagnet.com				No	Membership			Select Action
11	jen_flynn@harvard.edu				No	Membership			Select Action
41 (0000113579)	nflores@cerescap.net				No	Membership			Select Action
43 (0000658901)	johnkirk@sabx.rr.com				No	Membership			Select Action
46 (0000899524)	jhwang@monorail.co.kr	Jong	Jong	Hwang	No	Membership			Select Action
47 (0000502957)	gunilla_j@hotmail.com	Gunilla	Gunilla	Isaksson	No	Membership			Select Action



In the steps that follow, we discuss how to filter by **membership level**, but you can also filter users by specific keywords, zip code, last name, and more. Try selecting various options from the Users Filter menu to see all the ways you can view and sort users of your site.

2. Click the “Users Filter” drop-down menu at the upper left and select “Membership Filter.”

The Users Filter menu is open, showing the following options:

- Key Fields filter
- Membership filter**
- Group Affiliation filter
- Interests filter
- Who Bought What filter
- Problematic Email filter
- Zip Code Smart-Find

ID	Email	Screen Name	First	Last	Level	Status	Renewed	Expires	Action
1	ops@omnimagnet.com	Magnet Team	Magnet	Team	No	Membership			Select Action
2	ops3@omnimagnet.com	MagnetL3	MagnetL3		No	Membership			Select Action

- From the “Membership Filter” page that appears, select all the membership levels for which you would like to download a list of active or former members.

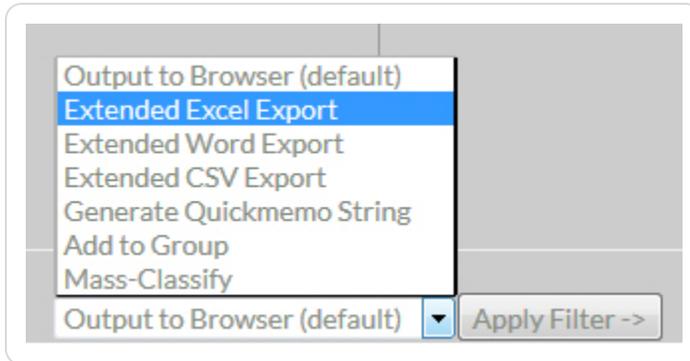
- Use the “Expiration Date” fields to select a time-based range of current and/or previous members of your organization to include in your list.



In the example at left, individuals whose membership was set to expire between the beginning of 2005 and the end of 2010 would be included in the list produced by the CMS. To download a list of **only** your current members, select “today” as the starting expiration date. **Note:** to include **lifetime members** in your search, **do not** enter any values in the ending expiration date (bottom) field.

If desired, select the “**Auto Renewing**” option to include individuals whose membership is set to automatically renew (i.e., does not have a specified expiration date).

- Use the “**Output Selection**” menu at the bottom of the **Membership Filter** page to choose a report type for your list—available formats are shown in the below screen shot:



For the purposes of this guide, we will select “**Extended Excel Export**” to obtain a membership list in **Microsoft Excel** format.

- Click the “**Apply Filter**” button. Your membership list appears in the format you selected in step 5:

UID	EMAIL	SCREENNAME	U.DATE RE	FIRST NAME	LAST NAME	AUX ID	MEMBERS	MEMBER \$	M.DATE L	M.DATE E	AUTO REN	UID
9	11 renerocq	Rene	#####	Rene	Rocque	1105073	7	1	#####	#####	0	11 0:
10	12 Bob.Loeffl	Robert	#####	Robert	Loeffler	529507	7	1	#####	#####	0	12 0:
11	14 david_tre	DavidTrev	#####	David	Treworgy	173302	10	1	#####	#####	0	14 0:
12	16 jackieben	Jacqueline	#####	Jacqueline	Bennett	1096141	7	1	#####	#####	0	16 0:
13	17 aeg@reas	Amanda	#####	Amanda	Gregory	828299	6	1	#####	#####	0	17 0:
14	105 jaaronsohn	aol.com	#####	Jonathan	Aaronsohn	687771	4	1	#####	2/9/2013	0	105 1:
15	115 Hera.Abbasi	@gmail.	#####	Hera	Abbasi	894105	2	1	#####	#####	0	115 1:
16	154 babsabramowitz	@cc	#####	Barbara	Abramow	780969	4	1	#####	#####	0	154 0:

Profile information (including names, ID numbers, email addresses, etc.) is provided for the members you specified in steps 1–5. You can now print, save, and/or distribute your list to others as needed.



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