HARVARD

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

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2	ops3@omnimagne	t.com			No Membership	Select Action
3	jbrown@omnimagi	net.com	Click the Apply Filter but	utton to	No Membership	Select Action
4	mkasher@omnima	gnet.com <		haved by the	No Membership	Select Action
5	dmizrahi@omnima	gnet.com	uisplay a list of users fl	itered by the	No Membership	Select Action
6	ops2@omnimagne	t.com	parameters specified in	the fields	No Membership	Select Action
11	jen_flynn@harvard	l.edu	abaya	No Membership	Select Action	
. (00001135	579)nflores@cerescap.	net	above.		No Membership	Select Action
	01)johnkirk@satx.rr.co	om			No Membership	Select Action
3 (00006589						
3 (00006589 6 (00008995	524)jghwang@monorai	l.co.kr	Jong	Jong Hwang	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."

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3. 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.



4. 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.

Expiration Date 💌									
between:									
2005 -	1 -	1 -	today						
and									
2010 -	12 -	31 -	today						
Auto Renewing (if applicable)									

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).

5. 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.

6. Click the "Apply Filter" button. Your membership list appears in the format you selected in step 5:

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2													
3	Generated	d by chand	ra_moham	med@har	vard.edu a	t 08/06/201	12 18:39						
4													
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7	UID	EMAIL	SCREENNA	U.DATE RE	FIRST NAM	LAST NAM	AUX ID	MEMBERS	MEMBER S	M.DATE L	M.DATE E	AUTO REN	UID L
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9	11	renerocqu	Rene	*****	Rene	Rocque	1105073	7	1	*****	*****	0	11 0
10	12	Bob.loeff	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	Jacquelin	*****	Jacquelin	Bennett	1096141	7	1	#########	*****	0	16 0
13	17	aeg@reas	Amanda	****	Amanda	Gregory	828299	6	1	*****	#########	0	17 0
14	105	jaaronsoh	n@aol.con	*****	Jonathan	Aaronsohi	687771	4	1	*****	2/9/2013	0	105 1
15	115	Hera.Abba	asi@gmail.	*****	Hera	Abbasi	894105	2	1	*****	*****	0	115 1
16	154	babsabrar	nowitz@co	*****	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.