HARVARD

Updating User Profile Data

As a site administrator, you sometimes may need to access a user's profile to make changes on his or her behalf. **Note:** use **only** the instructions in this guide to edit user profile information—**do not** use the process in the training guide titled "Viewing User Profile Data" to modify user profiles, as this may introduce erroneous information into users' accounts. To **modify** user profile data, refer to the sections that follow.

1. Click the admin menu button 🍪 and select "Manage Users."

	🛞 🎢 Welcome, HAA! 🗸
	Submit Article
	Manage Articles
	Manage Files & Images
and all and a second	Manage Newsletter
	Manage Events
	Manage Forums
Welcome	Manage Store
Lorem ipsum dolor sit amet, consectetur adipis magna aliqua. Ut enim ad minim veniam, quis n	Manage Memberships empor incididum ut uir
consequat. Duis aute irure dolor in reprehende	Report Center it esse cillum dolore eu fugi
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	Support Tracker

The **profile management** screen appears—from this screen, you can search for users within your site's database and update information associated with their accounts (see next page for a visual example).

2. Use the search fields within the profile management screen to locate the user whose profile information you wish to update:

Users	Groups	Classifications	Unsubscrib	be R	edundan	cies Sniffe	r	Auxiliary Sync
Users Filte	er: Key Fields	filter 🔹						
First Name	contains:	Last	Name contain	s:		Ema	ail cont	ains:
Home State	e contains:	Hom	e Zip contains			UID	(for ra	ange use "-"):
Work State	e contains:	Wor	k Zip contains	:		Con	npany l	Name contains:
School 1 N	ame contains:	Scho	ol 1 Degree co	ontains:		Sch	ool 1 G	rad Year within
Main Code	: Show All	Regi	stered betwee	en:	уууу -	mm 👻	dd 🔻	and yyyy 🔫
		Last	Update Date I	petween:	уууу 🗸	mm 👻	dd 🔻	and yyyy 👻
Criteria 1	Unclassified ·	-	Criteria 6	Unclass	sified 🔻			Criteria 1
Criteria 2	Unclassified ·	-	Criteria 7	Unclass	sified 🔻			Criteria 1
Criteria 3	Unclassified ·	-	Criteria 8	Unclass	sified 🔻			Criteria 1
Criteria 4	Unclassified ·	-	Criteria 9	Unclass	sified 🔻			Criteria 14
Criteria 5	Unclassified ·	•	Criteria 10	Unclass	sified 🝷			Criteria 1
					_			
					C	utput to E	Browse	er (default) 🔻
ID Email								Scree
1 ops@on	nnimagnet.coi	m						Magn
17 alumn	i_magnet@ha	rvard.edu						
61 ops2@	omnimagnet.	com						Magn

3. 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:

			Output to Browser (default) Apply Filter ->
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

4. To edit profile information for a specific user, select "Masquerade as User" under the "Action" dropdown menu to the right of the user name:

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

5. On the confirmation screen that appears, click the "**Masquerade**" button at the bottom:

Masquerade As User	
This feature allows the admin to "pretend" he or she are a different user.	
Once you click the Masquerade -> button, you will be logged-in as this user and will have full control over the account.	
Note: all Masquerade actions are carefully logged.	
Masquerade ->	

A second confirmation screen appears (see next page).

6. On the second confirmation screen, select the "Click here to begin the new session" link.



A new user masquerade session is initiated under the user ID you selected (i.e., you are now logged into the system as the selected user).

7. Verify that you are logged in as the selected user by ensuring that the "Masquerade as User (MAU)" menu appears at the upper left of your screen (you'll also need to use this feature to close your session when done).





Note: If you do not see the icon for the MAU menu, post a question to **Support Tracker** or contact alumni_magnet@harvard.edu for assistance—the AlumniMagnet team will respond as soon as possible.

8. Once you've confirmed that your session is active, you can then proceed to edit the user profile. Click the **"Welcome**" menu at the top of your screen, and select **"Update My Profile**."



The **profile editor** screen appears. Use the fields provided to make any required changes to the user's account:

iny ficcoline	ing riome	My Membership	My Orders	My RSVPs			
Perso	NAL						
-IAA Adm	in						
Exclude me f Note: Some info	com the online di mation may not	irectory. be changed online. To 1	update, please c	ll the University	Alumni Records	s at 1-617-495-2	2371.
Exclude me fi Note: Some info: Nicknatne:	rom the online d mation may not	irectory. be changed online. To t Nickname	update, please ci	ll the University	Alumni Records	s at 1-617-495-2	2371.
Exclude me f Note: Some info Nickname: Email Prefe	rom the online di mation may not errences	irectory. be changed online. To v Nickname	update, please c	ll the University	Alumni Records	s at 1–617–495–2	2371.
 Exclude me fi Note: Some info Nickname: Email Prefo Hide email action 	rom the online di mation may not erences Idresses in my on	irectory. be changed online. To n Nickname line profile.	update, please c	ll the University	Alumni Records	s at 1-617-495-2	2371.

When finished, click the "Update Profile" button at the bottom of your screen to save your changes:



9. After updating the user's profile, you'll need to end your MAU session. Roll over the MAU menu icon shown in step 7 to expand it, and select "**click to reverse**" to exit the account.

M.A.U. ON click to reverse	Select out of	" click to reverse " to the user's account.	log		
*	fi W e	elcome, HAA! 👻	About Us 👻	Membership 🗸	Events 👻
My Account	My Profile	My Membe	ership My (Orders My RS	SVPs

Your session ends, and the system returns you to the profile management screen shown in step 2.



Note: If you need to update profile information for more than one user, be sure to click the "**Home**" button after ending each MAU session. This resets your browser and prevents the occurrence of session errors.

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