

Creating Groups

In some cases, you may need to create specific categories of users for your web site—for example, you may wish to create an email distribution list composed of specific recipients, or restrict access to parts of your site to a certain subset of users. In scenarios such as these, it can be useful to create specific **user groups** tailored to your site’s requirements. To create a user group, refer to the sections that follow.

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).

2. From the profile management screen, select “Groups.”

The screenshot shows a navigation bar with tabs: Users, Groups (highlighted with a red box), Classifications, Unsubscribe, Redundancies Sniffer, and Auxiliary Sync. Below the navigation bar is a 'Users Filter' dropdown set to 'Key Fields filter'. The main area contains various search filters: First Name, Last Name, Home State, Home Zip, Work State, Work Zip, School 1 Name, School 1 Degree, Main Code (set to 'Show All'), Registered between (with year, month, and day dropdowns), Last Update Date between (with year, month, and day dropdowns), and seven criteria dropdowns, all currently set to 'Unclassified'.

The group management screen appears—to add a new group, click the “Add Group” button at the top of the screen:

The screenshot shows the group management screen with the 'Groups' tab selected. A blue '+ Add Group' button is highlighted with a red box. Below the navigation bar is a table of existing groups.

ID	Group Name	Group Description	
1000	Untitled Group (0)		View Edit
253	Job Board Managers (0)	Can edit everyone's jobs.	View Edit
252	Job Board Premium Recruiters (Pend/Publish) (0)	Can post jobs to 'Pending' of 'Live' status. Can only edit their own Pending/Live jobs.	View Edit
251	Job Board Recruiters (Pend only) (0)	Can post jobs to 'Pending' status only. Can only edit their own Pending jobs.	View Edit
201	Billing Access (8)		View Edit
102	New-User-Registration Notifications Recipients (0)		View Edit
101	Store Updates Recipients (0)		View Edit
10	Head Administrators (9)	Reserved for client's 2 Head Administrators only.	View Edit
1	Membership Review Board (0)		View Edit

The group editor screen appears:

The screenshot shows the group editor screen with the 'Groups' tab selected. The main content area contains the following text: '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".'

3. Enter a **name** and **description** for your group within the editor screen:

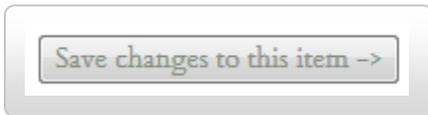
Choose the **group type** from the drop-down menu at the bottom of the screen:

The below table summarizes the attributes of each group type listed in the menu shown above:

Group Type	Description
Private	This group type is open to alumni and/or members of your club or SIG—candidates can apply by visiting the “Groups” page of your site (typically found at [your_domain]/groups.html). See http://www.harvard-la.org/groups.html for an example.
Public	Public groups are free and open to the public—any visitor to your web site is eligible to participate. Prospective members can join by visiting the “Groups” page mentioned above.

Group Type	Description
Mailing List	[Placeholder for mailing list description.]
Hidden	Hidden groups are not accessible from the “Groups” page of your site; this group type is visible only to administrators, and is used to organize database information for use in conjunction with forums and emails.
Dynamic	Dynamic groups are automatically generated by the Harvard web management system based on criteria that you specify. For example, you could create a group that includes only alumni who graduated prior to 1995. All dynamic groups are hidden and do not appear anywhere on your web site. For specific information and instructions on how to set up a dynamic group, see the Adding Users to a Group training guide.
Chapter–Public	[Placeholder for Chapter–Public description.]
Chapter–Private	[Placeholder for Chapter–Private description.]

4. When you are finished, click the “**Save changes to this item**” button at the bottom right of the screen:



Your settings are saved, and the system returns you to the group management screen shown in step 2.

5. If you selected a group type that is visible on the public portion of your web site, you can review it online by visiting your site’s “**Groups**” page. As mentioned in the preceding table, you can usually find this page at [\[your_domain\]/groups.html](#).

ONLINE NETWORKING...

Are you on Facebook? Please [visit our facebook group](#) page to view photos from recent events. While you're there, join the group and connect with fellow alums.

Board

Participants: 2

You are: Not a participant. [\[join\]](#)

Group Type: Private

Description: Officers and trustees who serve on the club's board

Sample group listing from a **groups.html** page

Once you've created your group, you can begin adding users to it. To find out how, refer to the [Adding Users to a Group](#) training guide.



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