

Online services cheat sheet
<http://alumnae.smith.edu/>

TO LOG IN



Go to the “Alumnae Directory & Email” box, pictured above, which is in the upper left of the AASC website. If you have never logged on to the AASC site before, you will need to click on “New User” and follow the instructions.

If you haven’t logged on to the site after January 1, 2009, your username will be the same but you must enter your AV number for your password. You can choose a password after this first log in.

SEND A BROADCAST EMAIL

On the AASC home page, click on “Volunteers.” In the pull-down menu click on “Volunteer Connections.” (If you are already logged in, you will go directly to the page. If you are not logged in, there will be a log in box now.) This is the Harris Connect page; the AASC site is no longer visible:

**HARRIS CONNECT
— ONLINE COMMUNITY
ADMINISTRATION TOOL**

HELPFUL HINTS
[Online HELP](#)
[Client Community](#)

TRAINING QUESTIONNAIRE
To help us better understand and meet your training needs, please fill out and submit this [questionnaire](#).

HOW-TO-QUESTION?
email: howto@harrisconnect.com
For all other inquiries, please contact your Client Relations Manager directly.

For your security - we recommend that you [change your password](#) every 90 days.

RECENT PRODUCT ENHANCEMENTS	
Date	Description
01-29-08	Donation/Membership Forms & Event Registration* - Additional Pay Options: This new feature allows administrators to activate additional payment options including invoice, pay at the door, check, and money order for online giving, membership, and event forms. A mailing address can also be provided where checks and/or money orders may be sent.
	Event Registration* - Non-calendar Event: There is a new "non-calendar" event setting available to designate whether an event should be displayed in the list of current events within the new Event Registration application.
01-19-08	Data On Demand - Additional Data Fields Available: Administrators have the ability to add activity and permanent email data to Data on Demand Report Content

On the left-hand side, under “Community Maintenance,” click on “Email Marketing” and you will see the following:

Email Marketing

Create & Manage Lists | **Create & Manage Content** | Address & Assemble Email | Send & Schedule | Reports

Create & Manage Lists

[Create a recipient list](#) | [Upload a recipient list](#) | [Combine recipient lists](#)

Page 1 of 11 | [next](#) | Go to page:

Manage existing lists: Displaying 1-20 of 203 items | [Show all on one page](#)

List name	List owner	List type	List count	Action
Club Hartford	aascstaff	Standard Query Builder	Unknown	Calculate Display Edit Duplicate Delete
Class of 1994	NaomG	Standard Query Builder	803	Calculate Display Edit Duplicate Delete
Reunion 2009 alumnae2	sogadmin	Advanced Query Builder	Unknown	Calculate Display Edit Duplicate Delete
Reunion 2009 alumnae	sogadmin	Standard Query Builder	Unknown	Calculate Display Edit Duplicate Delete
test again	aascstaff	Standard Query Builder	Unknown	Calculate Display Edit Duplicate Delete
Club Greenwich-Stamford	aascstaff	Standard Query Builder	300	Calculate Display Edit Duplicate Delete
notes	sogadmin	Standard Query Builder	Unknown	Calculate Display Edit Duplicate Delete
amila	sogadmin	Standard Query Builder	1	Calculate Display Edit Duplicate Delete
test list 23	aascstaff	Standard Query Builder	365	Calculate Display Edit Duplicate Delete
test list 2	aascstaff	Standard Query Builder	Unknown	Calculate Display Edit Duplicate Delete
MG	sogadmin	Standard Query Builder	1	Calculate Display Edit Duplicate Delete
Cambridge MA	aascstaff	Standard Query Builder	630	Calculate Display Edit Duplicate Delete
Boston 1	aascstaff	Standard Query Builder	1088	Calculate Display Edit Duplicate Delete

FIRST-TIME BROADCAST EMAIL USERS CLASS OFFICERS: Click on the yellow bar “Create a Recipient List”

Name your list in the “List Name” space

Email Marketing

Create & Manage Lists | **Create & Manage Content** | Address & Assemble Email | Send & Schedule | Reports

[Create & Manage Lists](#) > Create a recipient list

Standard Query Builder | **Advanced Query Builder**

Standard Query Builder

Name your list

List name: Mark this list as a test list:

Enter your search criteria

- + Address
- + Misc
- + Degree
- + Relation
- + School
- + Personal
- + Business
- + Common Search



Admin Restrictions: (Misc Donor Type = Smith College Alumna - No degree) or (Misc Donor Type = Smith College Alumna - Undergrad degree)

If you are looking for a class, click on the plus sign next to “School”

In first line, next to “Preferred Class Year,” keep the equal sign (=). Then enter your class year in the long yellow bar next to it, where it says “Multiple Values Allowed.”

Standard Query Builder Advanced Query Builder

Standard Query Builder

Name your list

List name: Mark this list as a test list:

Enter your search criteria

- Address
- Misc
- Degree
- Relation
- School

Preferred Class Year	=	<input type="text"/>	← Multiple values allowed
Other Degree 1	=	<input type="text"/>	
Other Year 1	=	<input type="text"/>	
Other Degree	=	<input type="text"/>	
Other Degree 2	=	<input type="text"/>	
Other Year 2	=	<input type="text"/>	
Other Degree	=	<input type="text"/>	
Other Degree 3	=	<input type="text"/>	
Other Year 3	=	<input type="text"/>	
Other Degree	=	<input type="text"/>	
Last Updated	before	<input type="text"/>	

- Personal

Scroll down and click on “Save List”

This should take you to the “Create & Manage Lists” section

FIRST-TIME BROADCAST EMAIL USERS CLUB OFFICERS: Follow above instructions, but instead of clicking on the plus sign next to “School,” click on the plus sign next to “Misc.”

In the fifth line down see “Club Designation,” keep the equal sign (=) and use the drop-down menu next to it to choose the area for your club

Misc

Career Occupation	=	<input type="text"/>	-- Choose One --
Donor Type	=	<input type="text"/>	-- Choose One --
Ada Comstock Scholar	=	<input type="text"/>	-- Choose One --
Senior House	=	<input type="text"/>	<input type="text"/>
Club Designation	=	<input type="text"/>	-- Choose One --

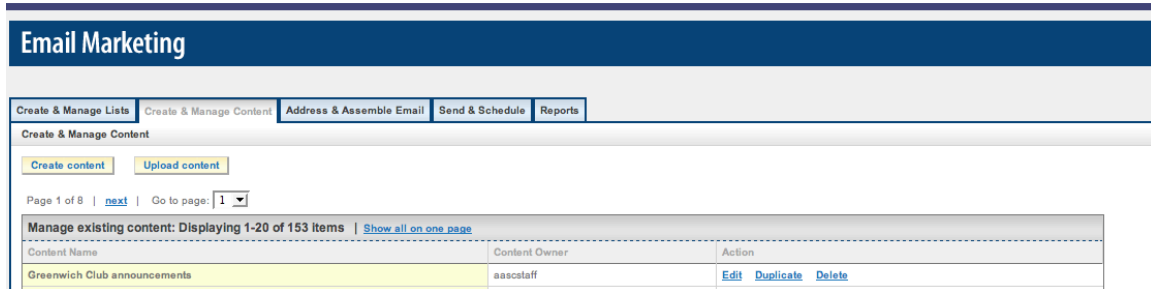
Scroll down and click on “Save List”

This should take you to the “Create & Manage Lists” section

IF YOU HAVE USED THIS BROADCAST EMAIL SERVICE BEFORE, you can simply click on the “Create & Manage Content” tab

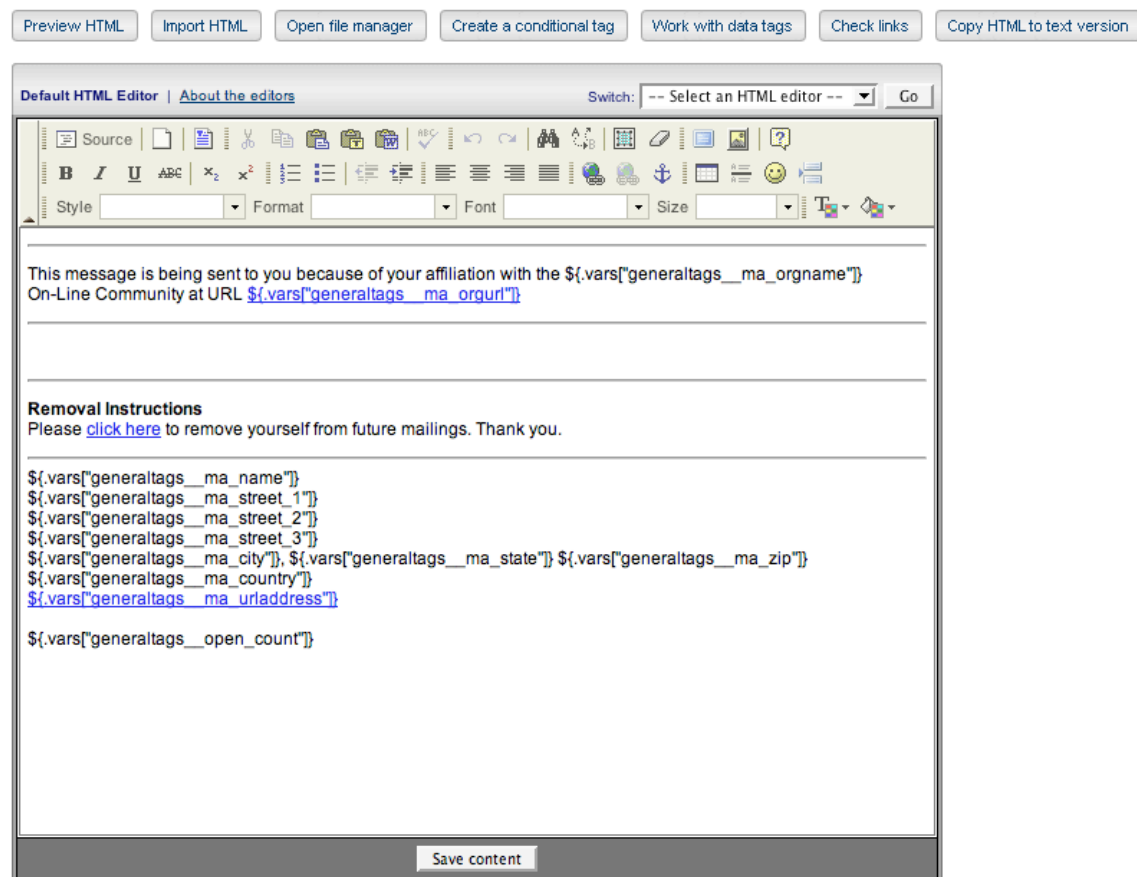
NEXT

Click on the “Create & Manage Content” tab. This page shows all the emails that you have sent



Click on “Create Content” to compose your email message

IMPORTANT: *Place your cursor on the top gray line and delete the line before you type your email. Your email text must be above the sentence: “This message is being sent to you because of your affiliation ...”*



When you have completed your email message click on the last bar, “Copy HTML to Text Version”

Then click on “Save Content”

NEXT

Click on the “Address & Assemble Email” tab

The screenshot shows the 'Email Marketing' dashboard with the 'Address & Assemble Email' tab selected. A yellow bar at the top of the content area says 'Address and assemble a new email'. Below this is a pagination control showing 'Page 1 of 9' and a 'Go to page' dropdown set to '1'. The main area contains a table titled 'Manage existing emails: Displaying 1-20 of 168 items' with a 'Show all on one page' link. The table has columns for Email Name, Email Owner, Category, Campaign, Recipient count, Testing Options, and Action. The first five rows are highlighted in yellow.

Email Name	Email Owner	Category	Campaign	Recipient count	Testing Options	Action
Greenwich club announcements	aascstaff	Clubs		Unknown	Calculate Display	Send test email Check spam rating Edit Duplicate Delete
Greenwich email2	aascstaff	Clubs		Unknown	Calculate Display	Send test email Check spam rating Edit Duplicate Delete
Greenwich Event	aascstaff	Clubs		163	Calculate Display	Send test email Check spam rating Edit Duplicate Delete
Christie presentation 09	zoebel43	Clubs		292	Calculate Display	Send test email Check spam rating Edit Duplicate Delete
new email	aascstaff	Classes		61	Calculate Display	Send test email Check spam rating Edit Duplicate Delete

Click on the yellow bar that says “Address & Assemble New Email” and see the following:

Email details

Enter a name for this email which will be used for scheduling and reporting purposes. Email recipients will not see this name.

Email name:

From:

From email address:

Reply-to email address:

To: [More information](#)

BCC email addresses: (Separate email addresses with commas)

Subject: [More information](#)

Email content and recipient list

Select email content:

Select recipient list:

Select type of email to send: HTML and text
 Text only

Campaign & Categories

Available campaigns:

Selected campaigns:

Available categories:

You must select at least one category for this email.
You must enter in a name for this email.
You must enter in a subject for this email.
You must enter in a 'To' value for this email.

Fill out boxes: "Email Name," "From," etc. Make sure that your email in the "From Email Address" and the "Reply to Email Address" are correct

In the "Email Content and Recipient List" section go to the "Select Email Content" drop-down menu. You will find your email there, listed as what you entered for "Email Name"

Go to the "Select Recipient List" drop-down menu and select your recipient list, which will be what you named your class or club list

In "Select Type of Email to Send" make sure "HTML and Text" are selected

In the "Campaigns & Categories" section, skip "Available Campaigns" and go to "Available Categories." Select either "Classes" or "Clubs" then click "Select."

Click on "Save This Email"

NEXT

You will now be back at the “Address & Assemble” main page. Click on the “Send & Schedule” tab

The screenshot shows the 'Send & Schedule' interface. At the top, there are tabs for 'Create & Manage Lists', 'Create & Manage Content', 'Address & Assemble Email', 'Send & Schedule', and 'Reports'. The 'Send & Schedule' tab is active. Below the tabs, there are options for 'Calendar view' and 'List View'. A yellow bar says 'Send a broadcast email right now'. To the right, there is a dropdown for 'Only show scheduled emails for this campaign:' with '<No campaign filter>' selected and an 'Update page view' button. Below this, it says 'To schedule a broadcast, select a day from the calendar below.' There are links for 'Calendar View: Month | Week | Day | Today | Year'. The main area shows a calendar for February 2009. Each day has a list of scheduled email events with checkmarks indicating they were completed successfully. For example, on Monday, Feb 2, there are events for 'Women in Business email', '1997 email', '1963 email', 'Cincy email', and '1974 email'. On Tuesday, Feb 3, there are events for 'smithcollege99@gmail.com', '2008 news', '2006 news', 'Feb E-Newsletter', and '1959 email'. On Wednesday, Feb 4, there are events for 'smithcollege99@gmail.com', 'Secretaries email Cheryl 2-4-09', 'Orange County and LA email', and 'SCC SF-Marin February eNewsletter re-do with expanded recipient list'. On Thursday, Feb 5, there are events for '1989 reunion updates', '1983 news', and '1983 news'. On Friday, Feb 6, there are events for '1969 news', 'Cambridge Club 2.6.09 winter program announcement', and '1983 news'. On Saturday, Feb 7, there is an event for '1983 news'.

Click on the yellow bar “Send a Broadcast Email Right Now” and this box will appear:

The screenshot shows the 'Send an email' dialog box. It has a title bar 'Send an email' and two main sections. The first section, '1. Select an email below.', has a list of 'available emails' including 'test again', 'Valentine's Day 2009', 'Greenwich club announcements', 'Greenwich email2', 'Greenwich Event', 'Christie presentation 09', 'new email', 'Reunion 2009 Announce', 'MN SmithiesFeb23', 'MN Smithies', 'February 2009 Newsletter--non-resident members', 'Smith Club of NYC February 2009 Newsletter', 'college luncheon to North Shore', 'College Luncheon Boston', '2/21/09 Tea', 'Reunion', 'rd all staff', 'Class of 2008', 'Rally Day Alumnae Announce 2', 'Rally Day Alumnae Announce', 'HARRIS TEST 2', 'Cultural Diversity Panel--non-resident', 'Cultural Diversity Panel', 'Harris Test', and 'ALAS Miami'. The second section, '2. Select the recurring options for this email.', has a 'Recurrence:' dropdown set to 'Does not recur', an 'End date:' dropdown set to 'No End Date', and a date selector for 'January 1, 2007'. Below this is a section '3. Add the email to the schedule.' which says 'This email will be added to the schedule on: 2/25/2009 at 12:01pm' and has 'Schedule this email now' and 'Cancel' buttons.

Find your email in the list, highlight it, and, on the right-hand side, click on “Schedule This Email Now”

A calendar of emails to be sent will appear:

6:00AM			
6:30AM			
7:00AM			
7:30AM			
8:00AM			
8:30AM			
9:00AM	<p>Greenwich Event ✓ Scheduled job completed successfully 9:18 AM - 9:19 AM</p>		
9:30AM	<p>Greenwich club announcements ✓ Scheduled job completed successfully 9:50 AM</p>	<p>Greenwich email2 ✓ Scheduled job completed successfully 9:38 AM - 9:39 AM</p>	
10:00AM			<p>Reunion 2009 Announce ✓ Scheduled job completed successfully 10:09 AM - 10:13 AM</p>
10:30AM			
11:00AM			<p>Valentine's Day 2009 ✓ Scheduled job completed successfully 11:23 AM - 11:24 AM</p>
11:30AM			
12:00PM			<p>HARRIS TEST 2 Broadcast scheduled - NOT APPROVED 12:01 PM Approve</p>

Find your email. Click on the red “Approve”

Your email will be sent.

Save for another time

Including links and attachments with your Email

Personalizing address options