

Harris Archive Project ^[1]

Harris Archive Project, detailed review

April 28, 2015 eComm Town Hall ^[2]

Migrating	Not Migrating
<ul style="list-style-type: none">• Data that is tied to records• Email Preference Data	<ul style="list-style-type: none">• Email Marketing activity<ul style="list-style-type: none">◦ Queries, Lists◦ Email Content◦ Images◦ Reports• Event Registration activity<ul style="list-style-type: none">◦ Registration Lists◦ Reports◦ Images

To ensure CU remains compliant with federal CAN SPAM legislation, email preference data will be migrated from Harris Connect to Salesforce. However, all other data and content (such as queries, content, images, reports, etc.) that are tied to Harris Connect's tools will NOT be migrated.

We encourage you to start thinking about this process so you are prepared for a smooth transition from Harris Connect to Salesforce. If you would like to archive emails and/or forms that you've built, please refer to the how-to guides below.

We're here to help. Please reach out to your eComm specialist ^[3] if you have questions or need additional support.

Email Marketing

- Create & Manage Lists
- Create & Manage Content
- Address & Assemble Email
- Send & Schedule

- Reports

Any lists that have been created or uploaded in Harris Connect will not automatically migrate to the new Salesforce platform.

If the 'List Type'(see image) reads 'Advanced Query Builder' or 'Standard Query Builder', that list will need to be recreated in Salesforce. In order to make this transition as seamless as possible, you will need to take a screenshot of the query for your records.

Lists that need to be archived include 'List Type'(see image) of 'Uploaded Email List' or 'Uploaded ID List'. These will need to be saved locally and imported into your Salesforce account.

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	
Manage existing lists: Displaying 94 items Show 20 items per page	
List name	
Copy of Advocates	
778_FA-or-SF	
Advocates	
Boulder -Alum-Advocates	
Advo-countycode-test	
ID-Start-Delete	
DNC-mj	
CO-Tour_CO-SP	
CO-Tour_DURANGO	

Detailed Instructions for Exporting 'Uploaded ID List' and 'Uploaded Email List'

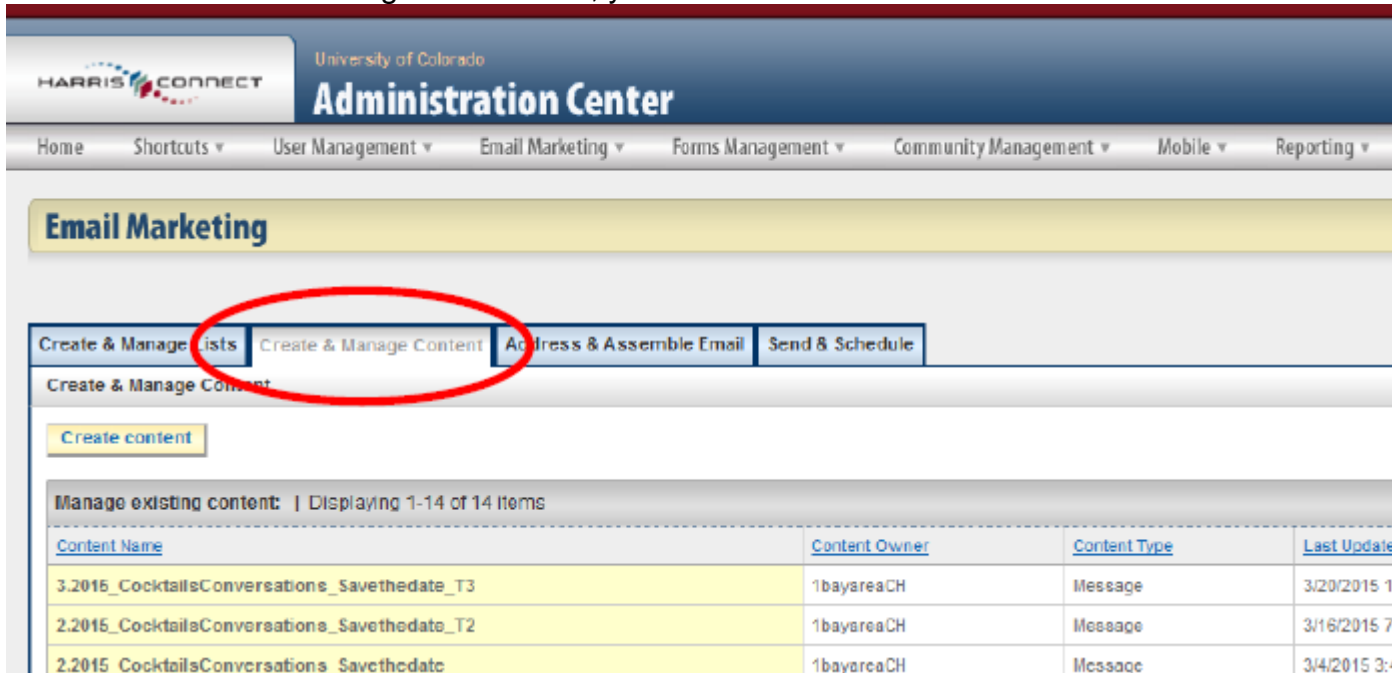
1. Log in to your Harris Connect account (contact your eComm specialist if you need credentials)
2. Navigate to 'Email Marketing' >> 'Create & Manage Lists' tab
3. Once you have identified the lists that you and your department need to archive, click 'Display' in the 'List Count' column for the list you wish to archive. *NOTE: Depending on the size of your list, this could take up to 2 minutes to display

4. A popup will appear. Click inside any cell, then select all by using the keyboard shortcut CTRL + A
5. Paste this information into an excel spreadsheet
6. Save as a.CSV file with a relevant naming convention.

It is your responsibility to ensure your graphics and content are archived locally in order to be uploaded into Salesforce. This includes any files uploaded in 'file manager' or created in 'Create & Manage Content'.

[infobox title="Detailed Instructions"]

1. Within the 'Create & Manage Content tab, you can click 'Edit' to edit an email.



University of Colorado Harris Connect Administration Center

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Email Marketing

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

Create & Manage Content

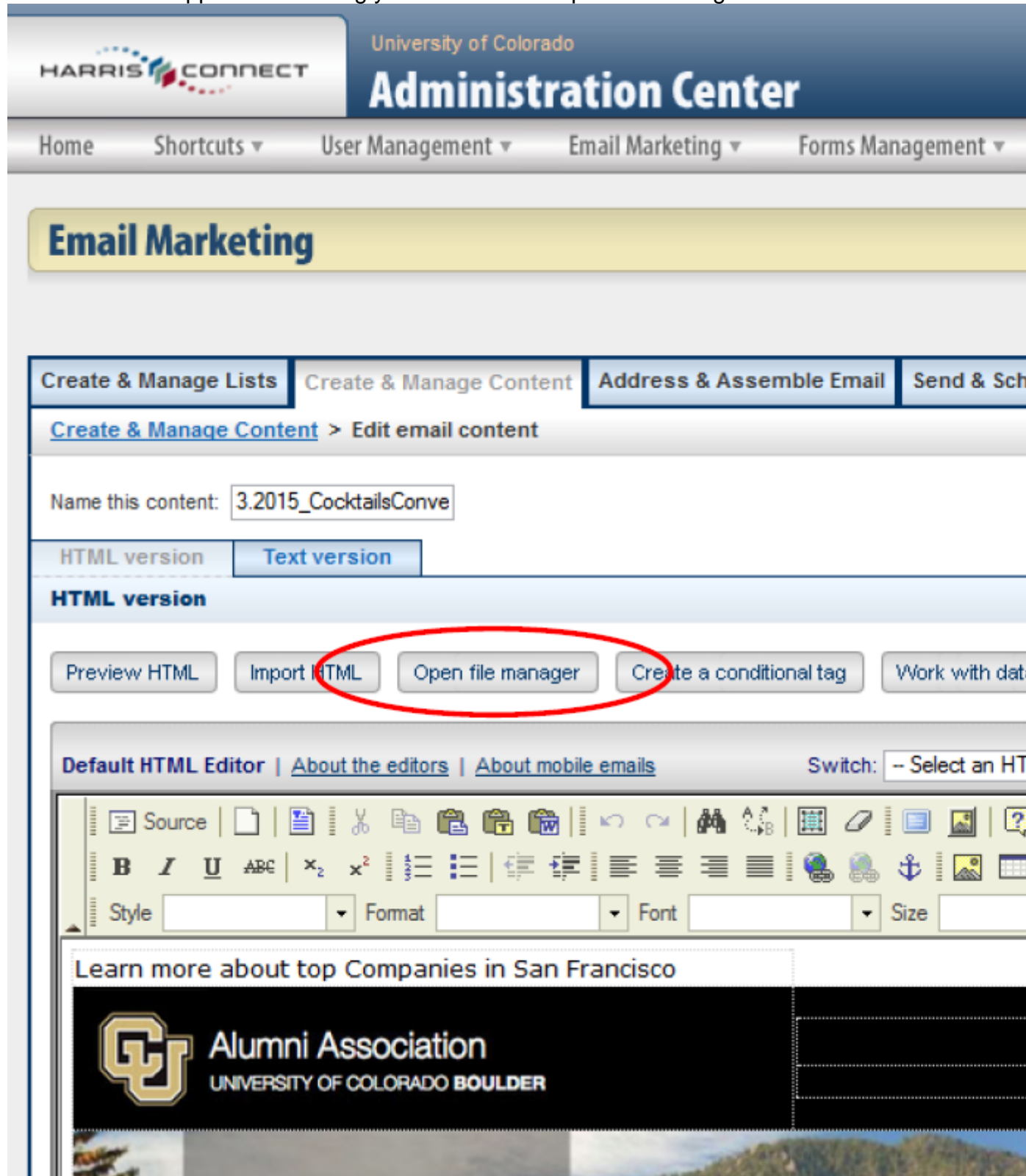
Create content

Manage existing content: | Displaying 1-14 of 14 items

Content Name	Content Owner	Content Type	Last Update
3.2015_CocktailsConversations_Saveethedate_T3	1bayareaCH	Message	3/20/2015 1
2.2015_CocktailsConversations_Saveethedate_T2	1bayareaCH	Message	3/16/2015 7
2.2015_CocktailsConversations_Saveethedate	1bayareaCH	Message	3/4/2015 3:

2.

Once the email appears for editing you can click on 'Open file manager'.



3. From the Folders section, find the folder(s) where you have uploaded your images. This will open your 'Community Services' Broadcast Email File Library. Within this library you

can navigate to the location of where you have uploaded your images.

Community Services

Broadcast Email File Library

CURRENT FOLDER:

[Library](#) / [boulder](#) / AlumniAssociation

144,147c89,92

To create a new folder, enter the folder name:

Create this folder

Folders

[Folder](#) ↑



[Return to previous Folder](#)

☐

[AlumniEvents](#)

[Copy](#) [Rename](#) [Move](#) [Delete](#)

☐

[B2B Emails](#)

[Copy](#) [Rename](#) [Move](#) [Delete](#)

☐

[Be Boulder Spring Events](#)

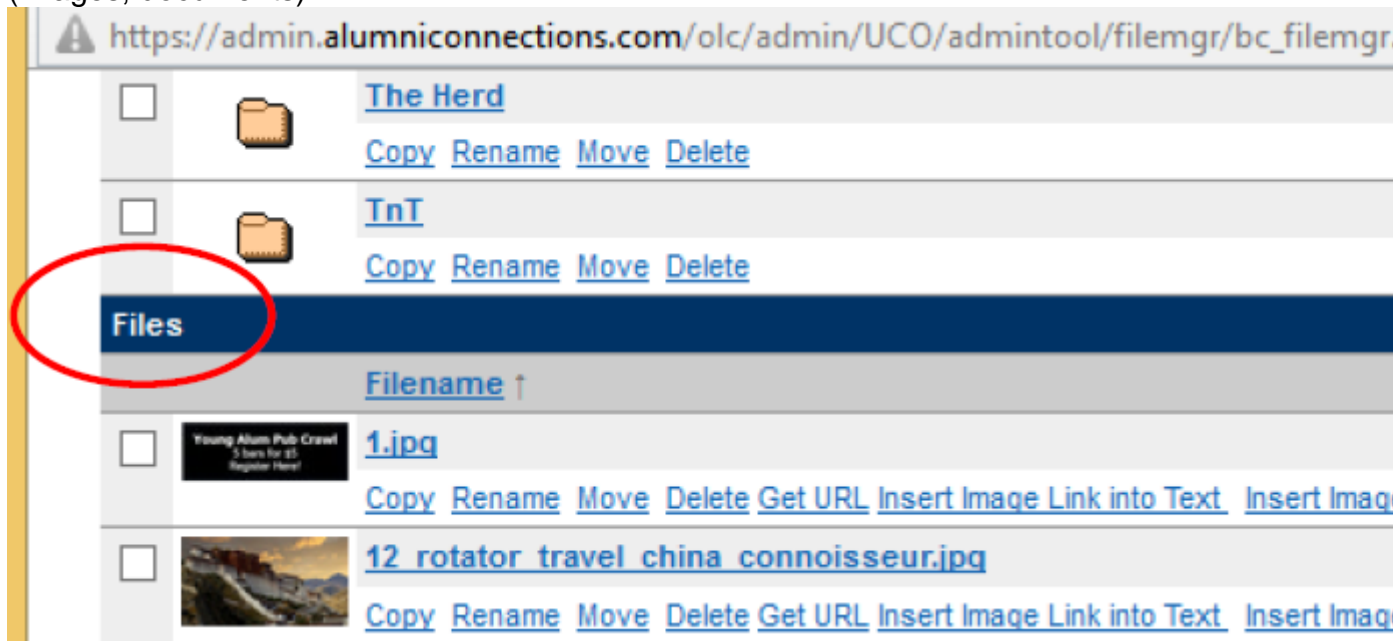
[Copy](#) [Rename](#) [Move](#) [Delete](#)

☐

[Book Store](#)

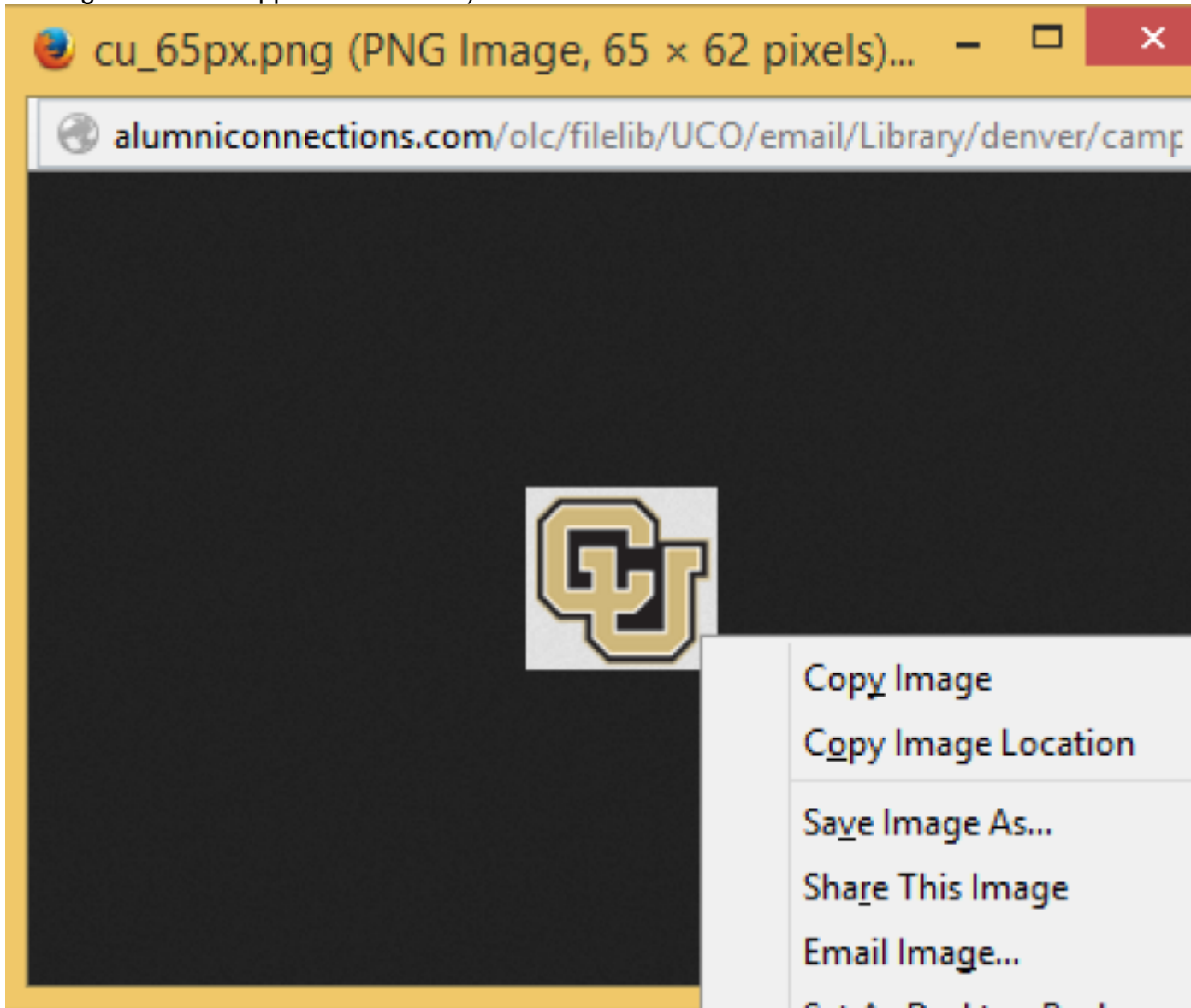
4. Once you find the correct folder, click on the folder and the files in that folder will appear below in the 'Files' section. You can scroll down to the 'Files' section to find your files

(images, documents).



5. By clicking on the Filename of the file you want to export, it will open another window with an image of your file. As you can see in the image below if you right click on the image it will allow you to "Save Image As". I recommend creating a folder on your C: drive (or network drive if you prefer) label 'Harris Images' and saving them there. When saving images, I recommend you title them in such a way that they describe the image and the size. (Please see Image

naming convention appendix attached).



You will need to complete this exercise for all the images you are wanting to have available to load into the new system.

[col width="1-4"]There are two components of 'Address & Assemble' that will automatically be transferred from Harris to Salesforce. This includes 'From' as well as 'From Email'(both outlined in red). If you need to retain any other piece of information from 'Address &

Assemble' you will need to keep a screenshot on your desktop.

Create & Manage Lists

Create & Manage Content

Address & Assemble Email

Send & Schedule

Reports

Address & Assemble Email > Edit email details

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:2015m0622_enevs

From:University of Colorado, Office of the President

From email address:OfficeofthePresident@cu.edu

Reply-to email address:OfficeOfThePresident@cu.edu

To:\${.vars["personalizedtags__first"]} \${.vars["personalizedtags__"]} [More information](#)

BCC email addresses:(Separate email addresses with commas)

Default BCC email addresses:contact@cu.edu, econm@cu.edu

Subject:March Alumni Newsletter [More information](#)

Email recipient list and content

Select recipient list:all admins

Select email content:2014m06celebrate_cs-alumni

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

Campaigns & Preference Categories

Available campaigns:Office of President Advocates ProgramPresident Bruce Benson EnewsAnschutz Medical CampusCU BoulderCU Denver

Select -->

<-- Remove

Selected campaigns:

Available preference categories:CU Denver Parent and FamilyUCCS Upcoming EventsCU President holiday cardFocus on CU FacultyKIMEGANTEST

Select -->

<-- Remove

Selected preference categories:CU System announcements

Email definition ok.

Save this email

None of the information housed in 'Send & Schedule' will be transferred to Salesforce. If this is information you or your department needs to archive, you will need to take a screenshot and save it locally.

There is an easy way to obtain analytics on all of your emails. Such information includes: List count, success of delivery, opens based on device, clicks, unsubscribes, and bounces. A sample report is provided below.

Email Comparison Report INFO Printer friendly version Download this report (CSV format)		
Email name & Subject	Date sent ▼	
2014m12 service-excellence-award REMINDER Subject: Jan. 30 deadline: UCSC Service Excellence Award	1/26/2015 8:41am	1 2
nwss-2015-system Subject: CU Night at the Stock Show, Jan. 23	1/13/2015 11:25am	1 4
2014m12 service-excellence-award REMINDER Subject: REMINDER: Call for Nominations, Service Excellence Award	1/12/2015 6:30pm	1 2
2014m12 service-excellence-award Subject: Call for Nominations: Service Excellence Award	12/19/2014 8:30am	1 2
2014m12 confidentiality-breach Subject: Notification of Breach of Confidentiality	12/17/2014 6:45pm	1 1

Detailed Instructions

1. Navigate to 'Email Marketing'
2. In the 'Reports' tab, click on the 'Email Comparison Reports' subtab.
3. In order to run a complete historical report, you will need to clear the default 'Date Sent' and hit 'Apply filter'. Every email that has been sent from this account will appear.
4. Click 'Check all' then hit the 'Compare selected emails' button. Depending on the number of emails you have to compare, this might take up to 5 mins.
5. Once the report is ran, you can 'Download this report' and save locally.

Forms Management

Detailed Instructions

1. Log in to your Harris Events account.
2. Under the Reporting tab on the top silver navigation, hover over Form Reports, then

select Event Registration Reports.

University of Colorado Colorado Springs
Administration Center

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Event Registration Reports

Select an event

Display events with the following traits:

FORM NAME:

FORM ID:

EVENT TITLE:

EVENT START DATE: Between and

ACTIVATION STATUS

☐ Active (Test)
☐ Scheduled (Test)
☐ Active (Live)
☐ Scheduled (Live)
☐ Inactive

ARCHIVE STATUS

☒ Available
☐ Archived

CALENDAR VIEW

☐ Calendar events
☐ Non-calendar events

Apply filter

Events
Printer friendly version

FORM INFO		
ID ▾	Form name/description	Owner
188317	Lane Focus Group 4.21 (10-1130) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
188314	Lane Focus Group fac/staff (4.15 1-230) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
188313	Lane Focus Group 4.15 (3-430) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
188281	Lane Focus Group patients (4.21 1-230) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
187993	Daniels Scholarship Reception 4.2.15 Daniels Scholarship View detailed reports View summary reports View event item reports	4alumrelationsJH
187991	Literacy Fair 4.18.15 Education View detailed reports View summary reports View event item reports	4alumrelationsJH
187833	Commencement Registration May 2015 Graduation Registration View detailed reports View summary reports View event item reports	4alumrelationsJH
187830	LAS Commencement Registration May 2015 LAS Graduation Registration	4alumrelationsJH

3. Delete the date in the Event Start Date fields, then click the Apply Filter button. If you have archived events,

make sure to click the Archived box in the grey Archive Status area as well.

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Administration Center

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Event Registration Reports

Select an event

Display events with the following traits:

FORM NAME: FORM ID:

EVENT TITLE: EVENT START DATE: Between and

ACTIVATION STATUS

☐ Active (Test) ☐ Scheduled (Test)
☐ Active (Live) ☐ Scheduled (Live)
☐ Inactive

ARCHIVE STATUS

☒ Available
☐ Archived

CALENDAR VIEW

☐ Calendar events
☐ Non-calendar events

Apply filter

Events [Printer friendly version](#)

ID	Form name/description	Owner
188317	Lane Focus Group 4.21 (10-1130) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
488244	Lane Focus Group 4.21 (10-1130)	4alumrelationsJH

- Once the filter completes, click the Printer Friendly Version link at the top of the events list. This will allow

you to print/save a PDF of all the events (Available and/or Archived) within your Harris Events account.

Select an event

Display events with the following traits:

FORM NAME: FORM ID:

EVENT TITLE: EVENT START DATE: Between  and 

ACTIVATION STATUS

- ☐ Active (Test) ☐ Scheduled (Test)
☐ Active (Live) ☐ Scheduled (Live)
☐ Inactive

ARCHIVE STATUS

- ☒ Available
☐ Archived


CALENDAR VIEW

- ☐ Calendar events
☐ Non-calendar events













Apply filter

Events |  [Printer friendly version](#)

FORM INFO

ID 	Form name/description	Owner
188780	Campus Awards Ceremony 2015 CAC View detailed reports View summary reports View event item reports	4alumrelationsJH
188569	April 14 Northrop Grumman alum View detailed reports View summary reports View event item reports	4alumrelationsJH
188529	April 8 University Partners alum View detailed reports View summary reports View event item reports	4alumrelationsJH
188527	April 8 University Partners alum View detailed reports View summary reports View event item reports	4alumrelationsJH

Event Registration**EVENT START DATE:** Not specified**OWNERSHIP:** Owned by anyone**ACTIVATION STATUS:** All - Active & Inactive**ARCHIVE STATUS:** Available**CALENDAR VIEW:** All - Calendar and non-calendar events

ID	FORM NAME	OWNER	ACTIVATION STATUS	EVENT INFO					ORDER TO	
				EVENT TITLE	START DATE		NUMBER OF GUESTS ENTERED	NUMBER OF GUESTS MATCHED	ORDERS	A
188780	Campus Awards Ceremony 2015 CAC	4alumrelationsJH	Active	Alumni Night at the Festival of Lights	5/7/2014 11:30am		0	0	1	
188569	April 14 Northrop Grumman alum	4alumrelationsJH	Active	University Club	1/30/2015 5:30pm		8	0	9	
188529	April 8 University Partners alum	4alumrelationsJH	Active	University Club	1/30/2015 5:30pm		8	0	31	
188317	Lane Focus Group 4.21 (10-1130) Lane	4alumrelationsJH	Active	University Club	4/25/2015 5:30pm		0	0	12	
188314	Lane Focus Group fac/staff (4.15 1-230) Lane	4alumrelationsJH	Active	University Club	4/25/2015 5:30pm		0	0	13	
188313	Lane Focus Group 4.15 (3-430) Lane	4alumrelationsJH	Active	University Club	4/25/2015 5:30pm		0	0	12	
188281	Lane Focus Group patients (4.21 1-230) Lane	4alumrelationsJH	Active	University Club	4/25/2015 5:30pm		0	0	0	
187993	Daniels Scholarship Reception 4.2.15 Daniels Scholarship	4alumrelationsJH	Active	Alumni Night at the Festival of Lights	4/2/2015 11:30am		1	0	38	
187991	Literacy Fair 4.18.15 Education	4alumrelationsJH	Active	University Club	4/18/2015 5:30pm		0	0	5	
187875	St. Patrick's Parade - PARADE ONLY alum	4alumrelationsJH	Active	University Club	1/30/2015 5:30pm		0	0	2	
187833	Commencement Registration May 2015 Graduation Registration	4alumrelationsJH	Active	2013 Diversity Summit	5/15/2015 11:30am		0	0	13	
187830	LAS Commencement Registration May 2015 LAS Graduation Registration	4alumrelationsJH	Active	2013 Diversity Summit	5/15/2015 11:30am		0	0	19	

5. Also in the Event Registration Reports tab, you will find the “View event item reports” under the title of each event. This will give you a quick snapshot of the event in terms of number of attendees, total money received, etc.

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Event Registration Reports

Select an event

Display events with the following traits:

FORM NAME: FORM ID:

EVENT TITLE: EVENT START DATE: Between and

ACTIVATION STATUS
☐ Active (Test) ☐ Scheduled (Test)
☐ Active (Live) ☐ Scheduled (Live)
☐ Inactive

ARCHIVE STATUS
☒ Available
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CALENDAR VIEW
☐ Calendar events
☐ Non-calendar events

Apply filter

Events [Printer friendly version](#)

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188313	Lane Focus Group 4.15 (3-430) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
188281	Lane Focus Group patients (4.21 1-230) Lane View detailed reports View summary reports View event item reports	4alumrelationsJH
187993	Daniels Scholarship Reception 4.2.15	4alumrelationsJH

Event Registration Reports

[Event Registration list](#) > **PGA Golf Tourney 2015**

Detailed Reports

Summary Reports

Event Item Reports

PGA Golf Tourney 2015 (ID: 187222) [[Select another form/event](#) | [Edit form](#) | [Preview form](#)]

Event Title: PGA Golf Management Friends and Family Golf Tournament






Form Description: PGA

Event Item Summary Report

Event Report for "PGA Golf Tourney 2015"

 [Printer friendly version](#)

Total Orders:	10
Total Amount Charged (Including any discounts):	\$3050.00
Total Guests Entered:	0
Total Guests Matched:	0

Event Item	Identifier	Shared Inventory?	Total Units	Currently Available	Quantity	A
Yes, I will attend the Transitioning to Financial Independence event. 	UCOC_yes		50	50	0	\$
Number of Adult Attendees: 	event_item_1		0	0	0	\$
Number of Golf and Dinner Attendees:	UCOC_sr		0	0	9	\$
Number of Dinner-only Attendees:	UCOC_student		0	0	8	\$
Number of Golf-only Attendees:	UCOC_golfonly		0	0	9	\$
Number of Golf and Dinner PGA Student Attendees:	UCOC_youth		0	0	7	\$
Number of Dinner-only PGA Student Attendees:	UCOC_studentdinneronly		0	0	0	\$
Number of Child (0-5) Attendees: 	UCOC_child		0	0	0	\$
Total Bus Tour Attendees: 	UCOC_bus		0	0	0	\$
Remaining Registration Cost (cost is per person): 	UCOC_reg_remainder		0	0	0	\$

*Note: This amount does not include any applied discounts.

6. Within each event title is also the "View detailed reports" option. This allows you to download a .csv file of all event components from the form. It will give you a spreadsheet of attendee names, etc. (whatever the form designated). Make sure to select the date range when the form was active so you get

accurate information on your downloaded spreadsheet.

Display events with the following traits:

FORM NAME: FORM ID:

EVENT TITLE: EVENT START DATE: Between  and 

ACTIVATION STATUS

- ☐ Active (Test) ☐ Scheduled (Test)
☐ Active (Live) ☐ Scheduled (Live)
☐ Inactive

ARCHIVE STATUS

- ☒ Available
☐ Archived

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- ☐ Calendar events
☐ Non-calendar events

[Apply filter](#)

Events |  [Printer friendly version](#)

FORM INFO

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Event Registration Reports

[Event Registration list](#) > **PGA Golf Tourney 2015**

Detailed Reports

Summary Reports

Event Item Reports

PGA Golf Tourney 2015 (ID: 187222) [[Select another form/event](#) | [Edit form](#) | [Preview form](#)]

Event Title: PGA Golf Management Friends and Family Golf Tournament

Form Description: PGA

CREATE DETAILED REPORTS

CUSTOMIZE REPORT LABELS

Select a date range for this report

START: February 25 2015 END: March 25 2015

Create a report

SELECT A SAVED QUERY OR PRE-DEFINED REPORT: -- Select a query -- ...or select/modify report criteria below.

SELECT REPORT CRITERIA

DISPLAY REPORT

Order Information

☐ Order Information - Include all fields

Or, select individual fields below:

- ☐ FORM ID
- ☐ Order ID
- ☐ Order Date
- ☐ Amount Charged
- ☐ Currency
- ☐ Merchant Reference Number
- ☐ Merchant ID
- ☐ Credit Card Number
- ☐ Pay Processor Reference
- ☐ Pay Processor Response

Download report - txt format

Download report - csv format

| SAVE THIS QUERY:

Save

NOTE: If you need an archive of the actual form, you will need to go to that form's url and take a screen shot of the form itself. You may also click on the event title, then click the Web View button at the top to see the form in an internet provider's window.

Event Registration

[Create & Manage Forms](#) > "Lane Focus Group 4.21 (10-1130)" (Form ID: 188317)

Edit Event Pages

Edit Event Configuration

Preview Event

View & Manage Orders

PAGE 1

REVIEW ORDER PAGE

THANK YOU PAGE

CONFIRMATION EMAIL

Edit Page 1

Preview this page:

 Web view































































 Mobile view

 Admin view

 Create a new page

Sections

 [Add a section](#)

ORDER	ACTIONS	SECTIONS	SETTINGS		
					
Re-order		Section Name	Device	Audience	Timing
		Introduction	 		
		JavaScript Functions	 		
		Registered Member Prompt	 		
<input type="text" value="1"/>	Rename Delete	Event Details	 		
<input type="text" value="2"/>	Rename Delete	View Attendance List	 		
<input type="text" value="3"/>	Rename Delete	Add To Waiting List	 		
<input type="text" value="4"/>	Rename Delete	Personal Information	 		
<input type="text" value="5"/>	Rename Delete	Billing Address	 		
<input type="text" value="6"/>	Rename Delete	Home Address	 		
<input type="text" value="7"/>	Rename Delete	Event Guests	 		
<input type="text" value="8"/>	Rename Delete	Payment Information	 		
<input type="text" value="9"/>	Rename Delete	Match Guests	 		
<input type="text" value="10"/>	Rename Delete	Confirmation	 		
		Submit Button	 		
Re-Order					

Sections

 [Add a section](#)

Groups audience:

eComm

Source URL: <https://www.cu.edu/ecomm/harris-archive-project>

Links

[1] <https://www.cu.edu/ecomm/harris-archive-project>

[2] <https://www.youtube.com/watch?v=vcxNNzKnlpY&t=17m10s>

[3] <https://www.cu.edu/ecomm/ecomm-specialists>