User Manual

Blackboard connect 5

Using Groups and Dynamic Groups in Connect 5

Introduction

Blackboard Connect 5 allows you to organize your contacts using groups so you can send your messages to multiple Recipients with only one selection.

When you create your groups, you have the option of creating a regular group or a dynamic group.

Regular Groups

Referred to as simply "Groups," this type of grouping works like your address book on your computer or smartphone, allowing you to assign contacts directly to a group through the Recipient's Contact page located under Recipients.

Dynamic Groups

Instead of assigning individual Recipients to a Group, Dynamic Groups are similar to Smart Folders on a computer, which allow you to choose who should be in your group based on a set of search filters rather than statically assigning a Recipient to a Group.

For example, let's say you want to create a special group to all male athletic students who speak Spanish. Instead of having to go through your Recipient's contact information to see which students should be included, you can simply use the filters to select which site your Recipients belong to, staff, business, grade, etc.

Additionally, Dynamic Groups also have the ability to update themselves automatically when new contacts are added. This means that if we were to add a new Spanish speaking Athletic student to our Connect 5 account, the new student will automatically be included in the Dynamic Group.

The example below illustrates the filters for a K-12 institution.
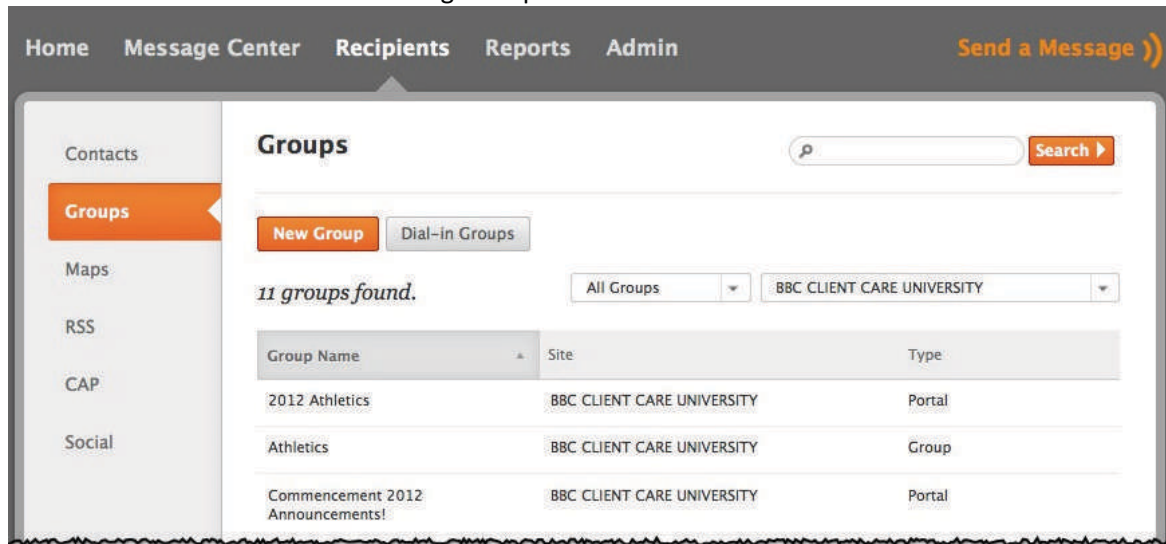
Create a regular or Dynamic Group in Connect 5:

1. Log into your Connect 5 account.

2. Click the Recipients tab located at the top of the screen.

3. Select GROUPS on the left side navigation pane.

4. Click **New Group**.

5. Provide a name for your portal in the GROUP NAME FIELD and select a site the group where will be used.

6. Click the Portal check box if your institution has a portal and you would like your Recipients to be able to manage their group subscriptions from the portal.

7. Provide a 1000 character description for the Group (optional).

   At this point, you have the option of creating a regular Group or a Dynamic Group.

Assigning Contacts to a Regular Group

1. Click the ASSIGN CONTACTS LINK located under the Portal check box.

2. Use the Filters and search bar to narrow search for your contacts. When you're done, click the   button. Connect 5 will search your Contacts for all Recipients and list them below your filters.

3. Mark the checkbox next to each Recipient you want included in your Group.

4. 11. Click the **Done** button when you're ready to save your Group.

Your Group will now be published to the Groups folder under Recipients.

NOTE: The instructions above illustrate how to create a regular "static" group. This means that all Recipients in this group must be added or removed manually by a Connect 5 user at your institution or by the Recipient using your Institution's Connect Access Portal.

Adding Recipients to a Group from a Contact Page

You can also add a Recipient to a regular Group from the Recipient's Contact Page. The Contact page is the web page that displays your Recipient's contact information and can be accessed from the Recipients Tab under Contacts.

To add a Recipient to a group from the contact page:

1. Click the Recipient Tab located at the top of the screen.

2. Select CONTACTS from the left side navigation bar.

3. Use the search field and filters to locate the Recipient you'd like to add. You can also simply click the
   Search ▶ button with nothing in the search field to view all your Recipients.

4. Locate the Recipient you'd like to add and click the icon located to the right of the Recipients listed entry. This will open the Recipient's Contact Page in edit mode.

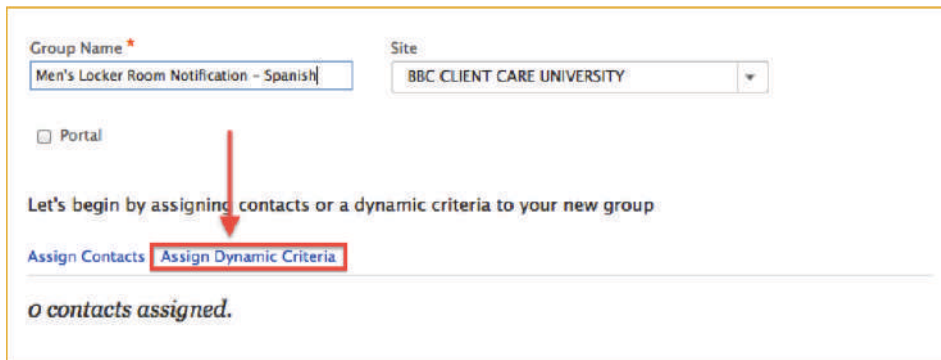|				
⬇	Adama, Lee	BBC CLIENT CARE UNIVERSITY	Student	✎ 🗑
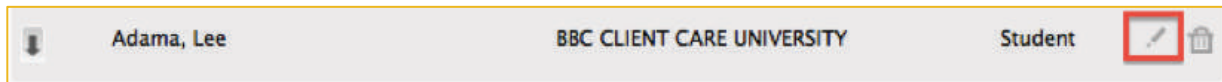
5. Scroll down to the bottom of the Contact Page and locate the section labeled GROUP ASSOCIATIONS.

6. Click the + button.

   A popup window will open with all your groups displayed on the screen. Check the box next to each group you'd like your Recipient to belong to.   To unsubscribe a Recipient from a group, simply uncheck the box.

7. Click **APPLY** when you're done.

Creating Dynamic Groups

1. Click the **Assign Dynamic Criteria** hyperlink located below the Portal Checkbox.

2. Use the Connect 5 filters to select the criteria for your Dynamic Group.

In the example below we've selected students for the type, Spanish as our language, Athletics for the Group, and males for the Gender.

3. Click **Done** when you're ready to save your Dynamic Group.

Your Dynamic Group will be saved. From now on, any new contact who is male student, has Spanish as a default language, and belongs to the Athletic Group will automatically be added to this Dynamic Group.

Contacting Client Care

If you have any questions regarding the information in this manual, you can contact us 24 hours a day, 7 days a week. Also check out our new support website **Behind the Blackboard**, where you can find more information about Connect's special features as well as share ideas with other schools and institutions.

Phone Support: *1-866-360-2155*

Email Support: *connectsupport@blackboard.com*