Listserv® Training
For
University at Buffalo
List Owners
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What is a LISTSERV®?
LISTSERV® is a commercial mailing list management system that allows you to subscribe to or create, manage, and control an electronic mailing list.

There are three main types or styles of mailing lists, each with its own advantages for specialized use:

**One-Way Announcement Lists** – the list administrators are the only people allowed to send to the subscribers. The communication flows one way, from the list owner to the subscribers. This type is used primarily for newsletters, product announcements, and dissemination of information that does not require feedback.

**Two-Way Discussion Lists** – the list administrators and list subscribers are both permitted to post to the list. Communication flows both ways. This is used for discussion group purposes.

**Moderated Lists** – list has an editor(s) who review all incoming messages. The editor decides to allow or disallow postings to the list.

Who can create a LISTSERV?
A LISTSERV® list can only be created for official University business such as courses, departments, classes, officially sanctioned student clubs and organizations, and other local and regional organizations or government agencies that have an affiliation with UB. In order to request that a list be created, the requestor also must be affiliated with UB.

Note to students requesting a LISTSERV®: As a matter of LISTSERV® policy, we require a faculty or staff advisor or instructor to contact before we can fulfill any request by a student. The student will be asked to supply the advisor's UBITname or alternate Email address before submitting the request. LISTSERV® lists will not be created without this information.

How to create a list
To request a list
1. Go to [http://listserv.buffalo.edu](http://listserv.buffalo.edu)
2. Click on the link “Request new list” - read the introduction regarding University at Buffalo LISTSERV®.
3. Then follow the link marked “Click Here To Continue”.

![大学信息页截图](attachment:listserv.buffalo.edu)
Log into LISTSERV®
You will be required to log in with a valid UBIT username and password to fill out the form to request a listserv.

After you have logged in, the system will take you to the University at Buffalo LISTSERV® Request form. Fill in all the required information and then click the “Submit Request” button at the bottom of the page. Please note that the turnaround time to create a listserv may be up to 5 days.
Requesting a list

**Naming Conventions:** When filling in the University at Buffalo LISTSERV® New List Request Form, there are naming conventions to follow in choosing the list name:

1. Name should be as descriptive and informative as possible
2. End with the suffix "-list" to denote a mailing list.
3. **Class lists** - use the format of: two or three letter class name and section number, followed by a dash, followed by the two letter semester (sp for spring, su for summer, fa for fall) and two digit year abbreviation (09 for 2009). Example: cse101d-fa09-list
4. **Departmental lists** - use the format of: department abbreviation (by UB Entity code), followed by a small description or the purpose of list. Example: The English department is conducting a conference this year, the list name could be eng-conference-09-list
5. **Student Clubs and Organizations** - use the format of: sa (student activity) or gsa (grad student activity) followed by a dash, then a description of the list. This includes Student Association clubs, intramural sports, greek clubs, and honor societies. Example: sa-fieldhockey-list or gsa-chemistry-list
Who should be able to review list membership? [Review= ]
- Only the List Owner [Owner]
- Any List Subscriber [Private]

Where should replies be directed to? [Reply-to= ]
- Back to the List [List, Respect]
- Back to the Sender [Sender, Respect]

Will you NEED web archives of the list? [Notebooks= ]
- No [No]
- Yes [Yes]

Would you like the members of a course automatically added to your list?
By selecting this option, you will NOT need to add your students to the list of initial subscribers. Doing so will place them on the list twice.
- No
- Yes

If “yes” -- Course Registration # 111100

If "yes" -- Semester
- Spring 2010
- Fall 2009

List of initial subscribers
Initial subscribers are NOT emailed a "Welcome to the list" message.
List owners are automatically added, please do not add them in again.
Subscribers should be one per line, in the format: email_address firstname lastname
Please, NO commas or parenthesis
Example: pparker@buffalo.edu Peter Parker
   sally@buffalo.edu Sally Smith
   bob@buffalo.edu Bob Miller

Any comments or notes you would like to leave for the Listserv Administrators regarding the creation of your list:
For cross-listed courses, enter additional 6 digit course registration numbers below.
Note to students requesting a listserv: Please leave the UBITname or alternate Email address of your instructor or advisor in this box.

NOTE: Clicking on the submit button does not automatically create your list. A human Listserv administrator reviews your request and processes it. Currently, turnaround for new list requests is about 5 business days.
Register a LISTSERV® password

As an owner of a LISTSERV® you must have a password which is used as your LISTSERV® identification. This account and password will be what you will use to manage your lists.

1. To set a LISTSERV® password go to: https://listserv.buffalo.edu/cgi-bin/wa?GETPW1=LMGT1.
2. Enter your email address and password and confirm the password by entering it again
3. Click the [Register Password] button. When your password registration is accepted, a confirmation email will be sent to your email account.
4. You will have to activate your password by responding to the email (or clicking the link it contains).
LISTSERV® List Owner Web Interface

As a listserv owner, you can manage your lists by using the LISTSERV's List Owner Web Interface.

To log in, go to the LISTSERV® main page: http://listserv.buffalo.edu/ and click on List Owner Web Interface.
Logging in to manage your lists
You will need to enter your email address and listserv password at the log in screen. (not the password you use to log in to your computer or read your mail). If this is the first time you see this dialog, or if you have forgotten your password, you will need to get a new LISTSERV® password.

For your convenience, logging in defines a cookie in your browser, which is removed when you log off. If you are working from a public computer, you must remember to log off when you are finished with your work, or someone else will be able to use your account. On a private computer, you may set the cookie once and never need to log off. Although not recommended, it is still possible to log in with cookies disabled in the browser. In such a case, a temporary ticket, which will expire after a short time, will be issued, after which you will need to log in again.

Changing a LISTSERV® password
If you forget your LISTSERV® password you can easily change it by going to: https://listserv.buffalo.edu/cgi-bin/wa?GETPW1=LMGT1 Enter your email address and your current password and a new password (twice) then click the [Change Password] button.
Using the Toolbar on the List Owner Web Interface

The LISTSERV® List Owner Web Interface page is used to manage your list(s). The Toolbar on the List Owner Web Interface contains menus and icons that give you quick access to the different functions.

List Management - Manage list configuration, customization, and subscriber management.

List Moderation - show all messages needing moderation

Subscriber’s Corner - Manage list subscriptions.

Email Lists – Manage the main list archives page.

Preferences - Manages preferences to control the appearance and default settings of the Web Interface.

Logout - logs you out of the LISTSERV® Web Interface.

Help pages are accessed by clicking the Help icon at the right side of the toolbar.

Setting LISTSERV® Preferences

LISTSERV® allows you to set personal preferences to control the appearance and default settings of the List Owner Web Interface. Your personal preferences are saved with your email address and password, and they will be remembered each time you log in, even if you log in on a different computer.

To Change your login preferences:

1. Click on Preferences from the Toolbar
2. Click on the General Preferences, Archive Preferences, or Report Preferences tab.
3. Make your changes, and then click the [Submit] button.
4. Information for each option on the tabs can be found by clicking the Help icons
General Preferences Tab

The General Preference tab lets you set the appearance of the Web Interface;

The following preferences can be set:

**Mode** – Select how you want to view the Web Interface. The mode selected here will be displayed above the Toolbar.
- **Tutorial** - each web page is displayed with additional text that is meant to guide you through the options on the page. This is the best mode for beginners or for those occasional users.
- **Basic** - only the most common options are shown. This is the best mode for those users who are familiar with LISTSERV, but who are not experts and do not need to use the more advanced features. This is the default.
- **Expert** - each web page is displayed with no tutorial text, similar to Basic mode, and certain pages may contain advanced options that are not available with the Basic mode. The Expert mode is available for those users who are very familiar with LISTSERV.

**Text Size** – Select the size of the text for the Web Interface. Your options are:
- **Small** (text is 11 pixels)
- **Medium** (text is 12 pixels)
- **Large** (text is 13 pixels - default)
- **Extra Large** (text is 16 pixels)

**Navigation Style** – Select the toolbar style you prefer to work with.
- If you choose **Pulldown Navigation**, then the toolbar will consist of javascript-powered drop-down menus. This is the default.
**Start Page** – Select the page that you want to act as your home page when you log in to the Web Interface. The default is **LISTSERV Archives**.

**Page Title Icons** – Select whether the page title icons should be shown or hidden. It might make sense to hide the icons on low screen resolutions since the conserved vertical space makes more of the page fit on the screen. The default is **Shown**.

**Login Cookie Expiration** – Select how long you want your login cookie to be valid before it expires. The default is **No Expiration**, which means that the cookie will not expire until you explicitly log out. This means, for example, that you can close your browser and come back later and you will still be logged in. However, if you are working on a shared computer, for example, it might make sense to set the login cookie to expire for added security. After a time of inactivity, the cookie will no longer be valid and you will need to log in again to continue.

**List Management Dashboard**

The **List Management** menu on the Toolbar gives you a variety of features for working on and maintaining your lists and subscribers. The List Management Dashboard is one of the screens that may appear when you log in. (This is determined by your preference settings.) If it does not appear, then you can open the dashboard by clicking **List Management**, and then **List Dashboard**.

The top part of the List Management Dashboard is divided into two sections:

- The left side provides information and reports about your technical support and lists.
- The right side shows the Moderation section. Each section uses icons to indicate its status and available actions:
Using the List Management Dashboard for Moderating Lists

To manage moderated list you can go into the List Management Dashboard and click on List Moderation.

The Moderation section lists any messages that are awaiting moderation. The messages displayed in this section belong to a list for which you are listed as a moderator. The bottom part of the screen contains a table that shows list configuration and list activity (changelog) data, which is a combination of the List Report and the List Activity reports.

- **Green Shield with a Checkmark** – This icon means that you are current. Note that in the Moderation section this icon mean that there are no messages pending moderation.

- **Orange Diamond with an Exclamation Mark** – This icon means that something requires attention. Note that for the Moderation section, this icon means that there are messages pending moderation.

- **Life Buoy** – This icon is used if the Server Administrator has enabled technical support, making it easy and convenient to send requests to L-Soft support. Once you click on this icon, an email message opens. Enter any information describing your problem. Please be as detailed as possible.

Configuring a List

Once a list has been created, you may wish to make some configuration changes such as adding an additional list owner. Lists can be configured thru the List Owner Web Interface using a wizard or thru manual configuration changes. This will guide you step-by-step through the configuration process.
List Configuration Using the Wizard
To open the List Configuration Wizard:

1. Click on the **List Management** menu

2. Select **List Configuration**

3. Select **List Configuration Wizard**.

4. You will see a box called **Select List**. You can select your list here:

   **Tip:** To view help for any option in the List Configuration Wizard, simply click on the **Help** icon associated with it.
**List Configuration Tabs**

**Description** - Shows settings for List Title, List Description and HTML Description.

**List Title** - Shows the description or purpose of the list. The title must not exceed 40-50 characters. The list title is used as the "name" part of the list's email address in the mail headers.

**List Description** - Shows a brief description of the purpose of the list.

**HTML Description** - (Optional) If provided, it will be used by CataList, the online catalog of LISTSERV® lists.
The difference between a list owner and editor

Every list must have at least one list owner. This is defined by one of more Owner= lines in the list header configuration.

A List Owner is defined as a person with the ability to:
- edit the list header configuration
- add or remove subscribers to a list.

An owner does not have the ability to post email to or receive email from the list, unless they are also listed as a subscriber. Do not assume that since they are an owner then they can "do anything."

A List Editor is defined as a person with the ability to post to a moderated list.
- The first editor listed (nearest the top of the header) acts as the moderator. They receive all the postings from subscribers to approve.
- An editor will not receive list email unless they are also subscribed to the list.

How can I add or change the owners or editors on my list?

Lists can be configured manually or thru using the List Configuration wizard which guides you step-by-step through the configuration process.

To open the List Configuration Wizard:

1. Click on the List Management menu
2. Select List Configuration
The list configuration window will open where you can make changes to your list.

The following keywords are available for definition, if applicable:

**Editor** – defines the list editor(s). Enter the email addresses that are allowed to post to the list without moderation. The first address is the "primary" editor and the default moderator and must be a single email address.

**Moderator** – defines which editors of a moderated list receive postings for forwarding to the list. The default is the first editor as defined by the **Editor** keyword.

**Notebook** – indicates whether or not an automatic logs or archives of every piece of mail sent to the list is to be kept, and to define at which interval of time it was sent. The default value is **Notebook=No**.

**Notify** – defines whether the list owner is to receive notification of new subscriptions and deletions, etc. The default is **Yes**.

**Owner** – defines the person or list of persons who "own" the list. They are responsible for controlling access to the list.
Managing subscribers
The Subscriber Management screen allows the list owner to examine or delete a subscription and add a new subscriber to the list.
To open the Subscriber Management screen, click on the List Management menu, then select Subscriber Management.

Adding a new subscriber to a list
To add a new subscriber, click on the List Management menu, and then select Subscriber Management. The Subscriber Management screen opens. On the Single Subscriber tab, click the Select List drop-down menu to select the list you want to add the subscriber to. In the Add New Subscriber section, enter the email address and name of the new subscriber.

Then, select whether or not to send an email notification to this subscriber, and click the [Add to List] button.
Examining or deleting a subscriber
To add a new subscriber, click on the **List Management** menu, and then select **Subscriber Management**. The Subscriber Management screen opens. From the Single Subscriber tab, you can view or delete a subscription. This works very much like the "SCAN" command. Simply enter your criteria in the text box and click **[Search in List]**.

![Examine or Delete Subscription](image)

If there is no match for your entry, then you will get back the same page but with a Scan: No match message at the top. If, on the other hand, your search is successful, one of two things will happen.

If there are multiple matches for your criteria, a screen will be displayed with a scrollable list box containing all of the matches

![Select Subscriber](image)

Next, simply choose the user you want to examine or delete and click on the appropriate button. If you did not find what you were looking for, you can press the **[New Search]** button to get a new search screen.
Viewing all subscribers on a list
At the bottom of the window (in Subscriber Management) notice you have the options to review List Members either “In Browser” or “By Email”

In Browser will simply open a new Browser window and display a list of all subscribers:

By Email will generate an email to your email address with a listing of all subscribers:
Subscriber Management using Bulk Operations

The Bulk Operations tab allows a list owner to upload an input file containing email addresses and (optionally) names, one address per line, and either add all the email addresses in the file to the list (optionally replacing the current subscribers) or remove them from the list.

To access bulk operations, click List Management, and then select Subscriber Management. The Subscriber Management screen opens. Click on the Bulk Operations tab. The list of names must be saved as a .txt file and in the format of email_address name or just email_address.
How to repopulate a class list

If you have a list from a previous semester and you wish to reuse it for this semester and need to update it with the current class participants, you can repopulate the list by going to the LISTSERV® main page, and click on the link 'Repopulate Class List'. Enter the necessary information about your list then the new registration number of your class and the list will be refreshed with the new subscribers. Be sure the class list is entered correctly.

How to add a Welcome message to a list

1. From the main LISTSERV® page, click on the UB List Owner’s Web Interface.
2. Select your list after logging in.
3. From the List Management pull-down navigation menu, choose "Customization", then "Mail Templates".
4. Under "Select Template", choose "Welcome Message" and click the "Edit Template" button.
5. Add or Edit the text in the "Contents:" box and click "Update" when finished. This should be a plain-text only message.

Your welcome message will be sent out to each new subscriber, unless they are added 'quietly'.

How to rename a list

Renaming a list is not an easy task. It is usually easier to delete the list and request that a new list be created, however if that is not possible, send an email to cit-listserv@buffalo.edu requesting that your list be renamed and include the current name and the new name for your list.

How to change my subscribed email address

To change your address, send email to listserv@listserv.buffalo.edu with the command:

```
Change listname new_address
```

Where listname is replaced by the actual list name (what comes before the @listserv.buffalo.edu in the list address) and new_address is replaced by the email address you want to change to. Your email must come from the address you are currently subscribed as.

If you would like to change your address on all subscribed lists, use the wildcard symbol, *

```
change * new_address
```
Moderated lists

Similar to the two-way discussion list, a moderated list allows for the exchange of postings between subscribers and administrators, but an editor or moderator receives all incoming messages. The editor or moderator then decides to accept the message and post it to the list, or reject the message and not post it to the list. Lists can be set up with more than one moderator and they can take turns reviewing messages in a “round robin” fashion or all moderators can receive all messages.

Moderators receive and review postings sent to the list, and either approve them to be sent through the list or reject them to prevent them from being sent to the list. If there are multiple moderators, the list postings can be sent to each moderator in turn in a “round-robin” fashion or to all moderators. In the “round-robin” scenario, each message is sent to only one moderator for approval, sending one message to each moderator in the order listed in the list header before cycling back to the first moderator. The “round-robin” scenario allows a heavy load to be shared among several moderators. In the scenario where messages are all sent to all moderators, the first moderator to get to each message can approve or reject it. You would use this latter scenario if you want approvals to be made as soon as a moderator is available to review it.

The editors are those addresses that are allowed to send messages to the list without requiring moderation. The first address listed in the “Editor” keyword definition is known as the “primary” editor. If there is no “Moderator” defined, the primary editor is used as the sole moderator. The primary editor must always be an individual email address.

Responsibilities of a list moderator

The list moderator is responsible for approving or disapproving messages sent to the entire list.

An editor/moderator is needed for a moderated list only when Send= Editor is used in the list header configuration. If Send= Public or Send= Private is used, an Editor/moderator is meaningless. The first editor listed is the default moderator. The moderator keyword can be used to add more moderators if necessary.

For instance, one could use Moderator= address1@domain.name address2@domain.name.

Example of list moderation using List Owner Web Interface

The List Moderation Interface allows list moderators to moderate a list through the Web Interface, rather than using email. To start moderating a list, click on List Moderation from the Toolbar.

The List Moderation screen has a list selection area at the top. Click the drop-down menu to select the list you want to work with. Unlike the other list selection areas that show the lists for which the logged-in user is the owner, this one only shows the lists for which the user may act as moderator.
If you are moderator to more than one list, select the list you want to moderate. If there are no messages for you to moderate, the only action possible is to “refresh” using the [Refresh] button, which looks for messages to moderate in the selected list.

If there are messages to moderate, a table, like the one below, is displayed and contains all the messages.

The first column contains check boxes, one per message.
The second column shows the Subject of the message.
The third column shows the From email address that sent the message.
The fourth column shows the Date in the message (not necessarily when the message was received).

Accepting or Rejecting the Message
If you can tell at a glance which messages to approve or reject, simply check all the boxes corresponding to the messages you want to act upon. Next, go to the Action drop-down menu, select the action you want to perform – Approve or Reject. (The default action is Refresh, which simply refreshes the display without accepting or rejecting any messages). Click the [Submit] button to record your actions.

Viewing the Message
Sometimes, you cannot immediately tell whether a message should be accepted or rejected without reading the contents of the message. To open the message contents, click on the subject of the message to display a new view that shows only one message.
Example of List Moderation thru email

When a list subscriber sends an email to the list that has a list moderator, the moderator will receive an automated email from LISTSERV@listserv.buffalo.edu that looks like this:

Your message dated Thu, 4 Mar 2010 11:12:57 -0500 with subject "ENG305 Exam 2 Review Session" has been submitted to the moderator of the eng305-su10-LIST list: Jane Doe <xxxxx@BUFFALO.EDU>.

What the options of a Moderator are:
The moderator can approve or discard messages being sent to the list. After an email is sent the moderator can follow the link provided in the email and approve the message which will send it to the entire list of subscribers. Be aware that once an email is approved, it will immediately go to all subscribers on the list.

Approving an email:
An email requesting approval will look like this:

This message was originally submitted by mymail@GMAIL.COM to the TEST-LIST list at LISTSERV.BUFFALO.EDU. You can approve it using the "OK" mechanism (click on the link below), ignore it, or repost an edited copy. The message will expire automatically. You do not need to do anything if you just want to discard it. Please refer to the List Owner's Manual at http://www.lsoft.com/resources/manuals.asp if you are not familiar with the "OK" mechanism. These instructions are being kept purposefully short for your convenience in processing large numbers of messages.

To APPROVE the message:
http://listserv.buffalo.edu/cgi-bin/wa?OK=071B6EC5&L=CS-TEST-LIST

Hi guys,

The other TAs and I will be holding a review session for Exam 2 on Thursday, March 4th from 6-8pm in Talbert 107.

Thanks,
Sarah

If the moderator follows the link in the email to approve the request, they will be taken to a webpage with the following message showing that the message has been approved by the moderator and sent to all subscribers.

LISTSERV Command Response

OK 0A354E3C

Confirming:
> APPROVE eng305-su10-LIST 6DC6B1
Message successfully approved.
# Configuration of a moderated list

<table>
<thead>
<tr>
<th>Keyword and Suggest Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send= Editor</td>
<td>A moderated list, with all postings going to the primary editor. Instead of approving posts, the editor must resend the email message to the list, and may modify the message before resending it.</td>
</tr>
<tr>
<td>Editor= email-addresses</td>
<td></td>
</tr>
<tr>
<td>Send= Editor,Hold</td>
<td>A moderated list, with postings going to one moderator at a time, in round-robin fashion, for approval. Editors may post without requiring approval.</td>
</tr>
<tr>
<td>Editor= email-addresses</td>
<td></td>
</tr>
<tr>
<td>Moderator= email-addresses</td>
<td></td>
</tr>
<tr>
<td>Send= Editor,Hold</td>
<td>A moderated list, with postings going to all moderators for approval. Any moderator may approve any post. Editors may post without requiring approval.</td>
</tr>
<tr>
<td>Editor= email-addresses</td>
<td></td>
</tr>
<tr>
<td>Moderator= ALL, email-addresses</td>
<td></td>
</tr>
<tr>
<td>Send= Editor,Hold,Confirm</td>
<td>A moderated list, with postings going to all moderators for approval. Any moderator may approve any post. Editors must confirm their own posts.</td>
</tr>
<tr>
<td>Editor= email-addresses</td>
<td></td>
</tr>
<tr>
<td>Moderator= ALL, email-addresses</td>
<td></td>
</tr>
</tbody>
</table>
Questions?

Frequently Asked Questions - [http://listserv.buffalo.edu/](http://listserv.buffalo.edu/)

Email [cit-listserv@buffalo.edu](mailto:cit-listserv@buffalo.edu)