



UNIVERSITY of  
**ROCHESTER**

## **University of Rochester LISTSERV**

List Owner's Guide:  
Instructions for Self Service

**University of Rochester LISTSERV**

Access via: <https://lists.rochester.edu>

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## **About this guide**

This guide is intended for list owners with experience using LISTSERV in a subscriber capacity. The goal of this document is to assist with selecting the appropriate list type, requesting and setting up a list, and utilizing basic list management tools.

## **Support**

For additional assistance using the University of Rochester LISTSERV or to provide suggestions for the University of Rochester LISTSERV or this guide, contact:

University IT  
585-275-2000  
[UnivITHelp@rochester.edu](mailto:UnivITHelp@rochester.edu)  
<http://tech.rochester.edu>

## Introduction to LISTSERV

The University of Rochester LISTSERV is a tool used to create and manage email distribution lists. Distribution lists allow users to disseminate an email message simultaneously to a group of people in a fast and convenient manner.

### Distribution list roles

- List owner – the person(s) formally in charge of the operation of a specific list. List owners:
  - Set and change the configuration of the list
  - Add, delete, and modify subscriptions to the list
  - Assist subscribers and potential subscribers
- List moderator – receives incoming messages sent to a moderated list and determines whether they should be distributed to the list. List moderators:
  - Approve messages to be posted to the list
  - Stop inappropriate messages from being sent to the list
  - May edit the content of messages before sending them to the list
- List subscriber – are members of a distribution list. Subscribers:
  - Can leave a list
  - Can set the way they receive list postings or change the name or email address associated with their subscription, within the configuration limits set by the list owner
  - May be permitted to search and view the archives
  - May be permitted to send messages to the list, depending on the type of list
- Non-subscribers – everyone not subscribed to a list. Non-subscribers:
  - Can make a request via LISTSERV to be subscribed to a particular list
  - Depending on the list configuration, they may or may not be allowed to send messages to a list or read its archives

### Types of distribution lists

- One-Way Announcement Lists – The owners of the list are the only individuals who are permitted to send messages to the list. This type of list is primarily used for announcements, newsletters, or notifications.
- Two-Way Discussion Lists – All members of the list are permitted to send messages to the list. This type of list is primarily used for subject-related or common interest discussions groups.
- Moderated Lists – The owners and moderators of the list review the messages sent to the list. Owners and editors may choose to approve, edit, or deny the messages disseminated to subscribers.
- Hosted – List membership is managed automatically through Maestro – members meeting specific criteria are automatically added or removed from the list. Subscribers may not be able to remove themselves from this type of distribution list, depending on the configuration of the list.
- LISTSERV List – List membership is managed manually by the list owners, moderators, and possibly subscribers, depending on the configuration of the list.

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## Subscription guidelines

- Public or Open – These lists allow anyone to join or leave, ask questions, see who is on the list, and review the list archives.
- Private or Closed – Access to these lists is limited by the list owner(s). Individuals wishing to subscribe must be approved by the list owner prior to subscribing to the list. The list archives and membership are only available to approved subscribers (and in some cases, only a subset therein).

## Getting Started

### Access

Anyone is able to set up a LISTSERV account and gain subscriber access to the University of Rochester LISTSERV.

As a list owner, you will access LISTSERV via a web interface, located at <https://lists.rochester.edu>. From the interface, you can set and change your list configurations, modify subscriptions to your lists, and perform other administrative functions associated with your lists. A list owner must be an active member of the University community.

### Selecting the appropriate environment

Many email environments and services contain built-in tools for creating and managing distribution lists. Selecting the whether to use your email environment's built-in tool or using LISTSERV.

Some advantages of native email environment distribution lists include:

- Integrated with your existing email environment
- Minimal learning curve for current users

Some advantages of using a LISTERV list include:

- Archive of list messages accessible to members of the list
- Bounced message handling
- Digest format delivery options
- Integration with the University of Rochester's distribution list management tool, Maestro, for creating and maintaining lists using data source criteria
- List editor and moderator roles and capabilities
- Self-serve subscription management

## Requesting a LISTSERV List

University IT utilizes a web form for requesting LISTSERV lists. Begin by starting your web browser and visiting <https://service.rochester.edu/servicedesk/customer/portal/101/create/243> and selecting a Listserv list. This form includes some basic overview details about list configuration options.

## Managing your lists

The University of Rochester LISTSERV contains a robust selection of configuration and management options available for your lists. This section will cover the basics of the List Management Dashboard, list settings, and subscriber management.


To begin, start your web browser and go to <https://lists.rochester.edu>. This will take you to the LISTSERV home page. Log in using the email address and password you registered with LISTSERV.

The screenshot shows the LISTSERV Home Page for the University of Rochester. The page features a navigation menu on the left with options for Server Administration, List Management, and Subscriber Options. The main content area is titled "List Management Dashboard" and includes a "Select List:" dropdown, an "Owner: (Clear)" field, and a "Filter: (Clear)" field. Below this, there are two informational boxes: "Moderation" (indicating no messages require moderation) and "Technical Support" (indicating technical support is enabled). A "Report Format:" dropdown is set to "Table" with an "Update" button. A "Customize Report" section contains a table with the following data:

List Name	Subscribers	Owner	Subscription	Send
AT-ROCHESTER	0	marc.seigfred@ROCHESTER.EDU, rebecca.gaura@ROCHESTER.EDU	By Owner, Confirm	Owner, at-rochester@ROCHESTER.EDU
LISTSERV-TEST-MODERATED	7	charles.yanaitis@ROCHESTER.EDU	By Owner, Confirm	Editor, Hold, Confirm

LISTSERV Home Page

### Setting your LISTSERV preferences

After logging in to LISTSERV, navigate to the  button on the right side and select Preferences. This guide shows screenshots and keywords visible using Expert Mode. Select this mode and any other settings and click **[Update]** to save your preferences.

The screenshot shows the LISTSERV Preferences page with the following settings:

- Mode: Expert Mode
- Start Page: List Dashboard
- Login Cookie Expiration: No Expiration
- Cache Pages: Yes
- License Expiration Alert: 45 Days
- Support Expiration Alert: 45 Days
- Dashboard Changelogs: After Prompt Only

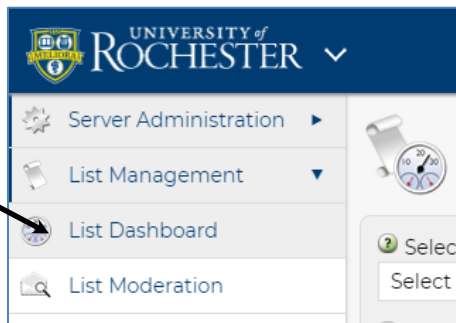
LISTSERV Preferences

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## List Management Dashboard

The List Management Dashboard view displays all of the lists you are an owner of as well as options to access configuration details and reports for your lists.

Access the List Management Dashboard by clicking the **[List Management]** selection from the LISTERV home page menu, followed by clicking **[List Dashboard]**.



Accessing the List Dashboard

In addition to displaying all of the lists you own, The List Management Dashboard has a drop-down menu to navigate directly to the list home page for any of your lists, as well as a search feature for finding specific lists by keyword.

Select lists from the drop-down menu.

Search for lists by attributes

Select lists from the display of all lists.

List Management Dashboard  
View list and moderation details at a glance

New in LISTERV 17.0

Select List:  
Select List

Owner: (Clear) Filter: (Clear) Items: (Clear) Update

TESTLISTS.ROCHESTER.EDU

Moderation Customize Report Technical Support

Report Format: Table Update

List Name	Subscribers	Owner	Subscription	Send	Notebook
AT-ROCHESTER	0	marc.seigfred@ROCHESTER.EDU, rebecca.gaura@ROCHESTER.EDU	By Owner, Confirm	Owner, at-rochester@ROCHESTER.EDU	Yes, D:\LISTERV\LISTS\AT-ROCH-Monthly, Public
LISTERV-TEST-MODERATED	7	charlesyanaitis@ROCHESTER.EDU	By Owner, Confirm	Editor, Hold, Confirm	Yes, D:\LISTERV\LISTS\LISTERV-MODERATED, Weekly, Private

List Management Dashboard

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## List Configuration

After finding the list you would like to configure on the List Management Dashboard, navigate to **List Management > List Configuration** to access the list configuration screen.

**List Configuration**  
Edit the configuration of a LISTSERV list

New in LISTSERV 17.0

Select List:  
MARC\_TEST Classic List for testing

Owner: (Clear) Filter: (Clear) Items: (Clear) Update

Keyword: (Show All Keywords)  
Search

My Configuration Descriptions Administrators Subscriptions Security Archives and Logs Attachments  
Error Handling Distribution Other

### List configuration

There are several tabs of options available for configuration:

**Descriptions:** allows list owners to change the list title, review the list headers, and edit the list description in both HTML and plain text formats.

**Administrators:** allows list owners to establish list editors, moderators, and additional list owners.

**Subscription:** allows list owners to establish default settings for users subscribed to the list and define the subscription type for the list (open, closed, by owner).

**Security:** allows list owners to establish additional security features for a list, including hiding the list from non-members in the web interface and adding password protection to list commands

**Archives and Logs:** allows list owners to establish a notebook of messages posted to the list for archival, review, and reporting. Configuration options for change logs are found here.


**Attachments:** allows owners to determine if, and which types, of attachments are permitted for messages posted to their lists.

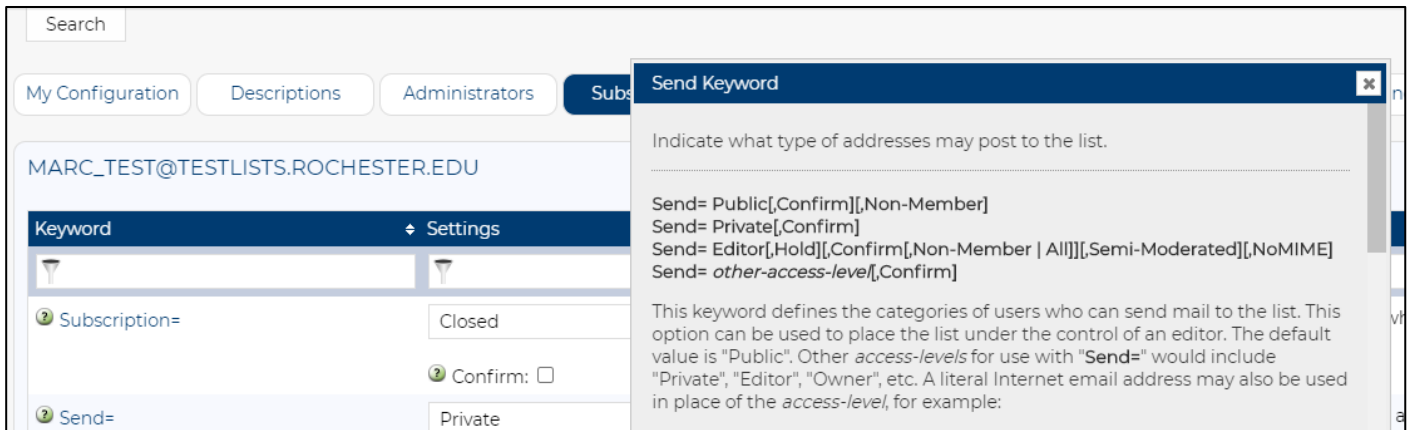
**Error Handling:** allows list owners to set LISTSERV to automatically remove members from list in the event their email address becomes undeliverable and yields bounced messages. List owners can set the quantity of bounces or duration of days messages bounce until members are removed. Error Handling also allows list owners to specify where a report of bounced messages is delivered.

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**Distribution:** allows list owners to establish daily limits for users sending to the list, establish and configure a digest of list messages, specify reply-to settings, and configure RSS Abstract properties for the list.

**Other:** allow list owners to select the default language for the list and set translation options for the list.

When reviewing or adjusting configurations for your lists, click the  button to review the options available for the setting you wish to adjust.



Setting keywords

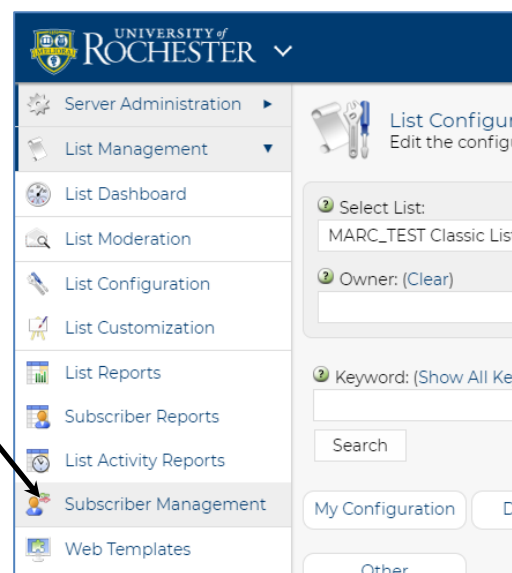
**Note:** Remember to click the **[Update]** button after making any configuration changes to commit them to your list. Click the **[Revert]** button to discard your changes.

## Subscriber Management

The Subscriber Management view allows you to add or remove recipients for your lists

Access the Subscriber Management view by clicking the **[List Management]** selection from the LISTERV home page menu, followed by clicking **[Subscriber Management]**.

This selection will take you to the Single Subscriber view of Subscriber Management



Accessing Subscriber Management



# List Owner's Guide: Instructions for Self Service

Subscription Management  
Add, delete or change subscriptions

New in LISTSERV 17.0 x

Select List:  
MARC\_TEST Classic List for testing

Owner: (Clear) Filter: (Clear) Items: (Clear) Update

Search for Subscribers (MARC\_TEST):  
henry@somewhere.com  
Henry Brown

MARC\_TEST@TESTLISTS.ROCHESTER.EDU

Email Address and Name:  
henry@somewhere.com Henry Brown  
Henry Brown <henry@somewhere.com>

Notification:  
 Send Email Notification  
 Do Not Notify the User

Add Subscriber

Use the **[Select Lists]** drop-down menu to select the list you would like to manage subscriptions for.

Examine subscription settings or delete individual subscribers from your list

Subscribe individual email addresses to your distribution list.

Subscriber Management – Single Subscriber view

## Subscriber Reports

The Subscriber Reports view allows you to review the membership of your list, review subscription settings for your recipients, and perform bulk operations affecting list membership

Access the Subscriber Management view by clicking the **[List Management]** selection from the LISTERV home page menu, followed by clicking **[Subscriber Reports]**.

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- Server Administration
- List Management
- List Dashboard
- List Moderation
- List Configuration
- List Customization
- List Reports
- Subscriber Reports
- List Activity Reports
- Subscriber Management
- Web Templates

List Configuration  
Edit the configuration

Select List:  
MARC\_TEST Classic List

Owner: (Clear)

Keyword: (Show All Keys)

Search

My Configuration

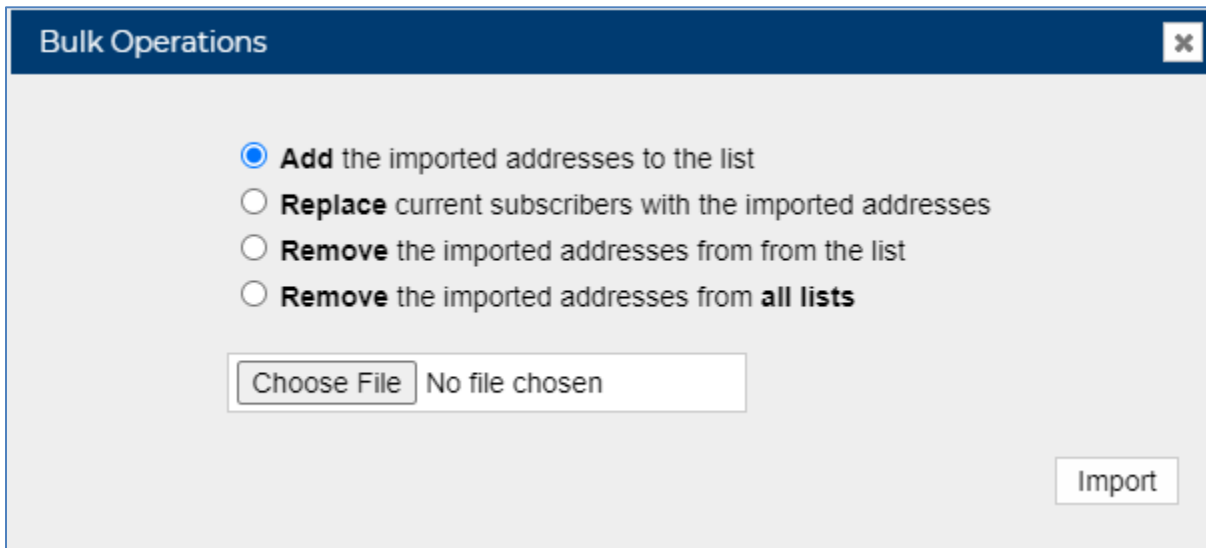
Other

Accessing Subscriber Reports

## List Owner's Guide: Instructions for Self Service

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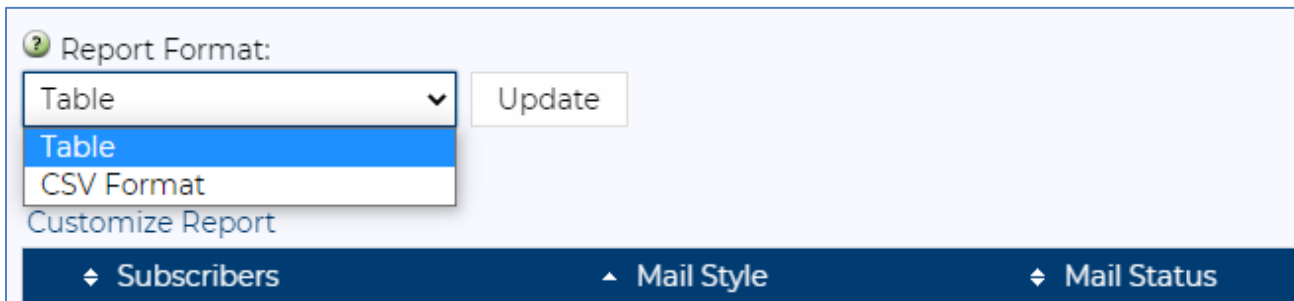
Similar to the Subscriber Management feature, the **[Add Subscriber]** button allows for an individual subscriber to list. Selecting the **(Bulk Operations)** option will pop up a widget for importing adds or removes in bulk



The image shows a 'Bulk Operations' widget with a dark blue header and a light gray body. It contains four radio button options: 'Add the imported addresses to the list' (selected), 'Replace current subscribers with the imported addresses', 'Remove the imported addresses from from the list', and 'Remove the imported addresses from all lists'. Below the options is a 'Choose File' button and a text field containing 'No file chosen'. An 'Import' button is located in the bottom right corner.

**Bulk Operations Widget**

The report format field displays current list members and their settings for a variety of subscription options. The **Report Format** drop-down allows you to export your list to a CSV file:



The image shows a 'Report Format' selection interface. It features a dropdown menu with 'Table' selected, an 'Update' button, and a 'Customize Report' link. Below the dropdown is a dark blue navigation bar with three items: 'Subscribers', 'Mail Style', and 'Mail Status', each with a diamond icon.

**Report Format Selection**

## Quick Reference

### List owner commands for LISTSERV

Once you have established your list with the University of Rochester LISTSERV, the following commands can be executed by sending an email message to [listserv@lists.rochester.edu](mailto:listserv@lists.rochester.edu) with the command in the body of the message:

- Review current list settings -  
Get <List Name>
- Review current list settings and subscribers -  
Get <List Name>
- Add a subscriber to a list -  
Add <List Name> <email address> <Subscriber Name>  
Example: Add UnivIT\_Test test@rochester.edu Jane Doe
- Remove a subscriber from a list -  
Delete <List Name> <email address>  
Example: Delete UnivIT\_Test test@rochester.edu
- Request a complete list of LISTSERV commands -  
Info Refcard

**Note:** Adding "Quiet" before any email command to LISTSERV will suppress any notification from being sent to affected list subscribers.

## Additional Resources

For additional assistance using the University of Rochester LISTSERV, contact the University IT Help Desk:

Phone: 585-275-2000

Email: [UnivITHelp@rochester.edu](mailto:UnivITHelp@rochester.edu)

Web: <http://tech.rochester.edu>

University of Rochester LISTSERV Home Page: <https://lists.rochester.edu>

University IT Mailing Lists: <https://tech.rochester.edu/services/mailing-lists/>

List Owner user agreement: <https://tech.rochester.edu/policies/mailing-list-policies/>

LISTSERV vendor documentation: <http://www.lsoft.com/resources/manuals.asp>