GETTING STARTED

IN THE

ALUMNI ARCHIVE APPLICATION

HTTP://ALUMNIARCHIVE.STATE.GOV

IIP-ECA/IT

IT Professionals serving the Public Diplomacy Mission of the US State Department

WRITTEN BY THE U.S. DEPARTMENT OF STATE TECHNOLOGY GROUP (IIP-ECA/IT/AP)

ALUMNI ARCHIVE VERSION 1.0. DATED SEPT 26, 2005

Welcome

Welcome to the Alumni Archive.

The purpose of the Alumni Archive is to create a consolidated database housing information on alumni of the exchange programs partially or fully funded by the State Departments Bureau of Education and Cultural Affairs (ECA). This data will be utilized for re-engaging alumni and offer them new program opportunities.

Definition of an Alumnus: ***An alumnus is any person who was selected for and has participated in an ECA funded program. Once the person has participated in the program he or she becomes an alumnus.***

The Roll Out

Please keep in mind as you use this application that it is an ongoing project. The database currently houses 400,000 alumni records. By summer of 2006 the Washington Alumni Affairs office will have collected and stored over 700,000 records. So, if you don't find all of your alumni right away, bear with us—they will soon be there!

1970

1970 is our Magic Year. Our goal is to collect in this database, alumni with program years since 1970. You will find some alumni from previous years—if we had their record we kept it!

We are interested in your thoughts, comments, and suggestions regarding problems that you may encounter and ideas for improving the application. Please send us your ideas!
Our email address is: ***alumniarchive@state.gov***

Notes:

WRITTEN BY THE U.S. DEPARTMENT OF STATE TECHNOLOGY GROUP (IIP-ECA/IT/AP)

ALUMNI ARCHIVE VERSION 1.0. DATED SEPT 26, 2005

Http://ALUMNIARCHIVE.STATE.GOV

For questions or problems with getting started in the Alumni Archive, please contact:

alumniarchive@state.gov

Sponsored by:

U.S. Department of State
Bureau of Educational and Cultural Affairs
Alumni Affairs Office ECA/A/P
SA-44 301 4th Street, SW
Washington, DC 20547

WRITTEN BY THE U.S. DEPARTMENT OF STATE TECHNOLOGY GROUP (IIP-ECA/IT/AP)

ALUMNI ARCHIVE VERSION 1.0. DATED SEPT 26, 2005

Register

GO to: **http://alumniarchive.state.gov**

CLICK on: "New User Click Here to Register"

ENTER: Your DOS email address, Press **Submit**

FILL in: Your information that is requested, Press **Continue**

REVIEW: Review your information, and press **Submit**.

CHECK: Check your DOS email for confirmation of your submission.

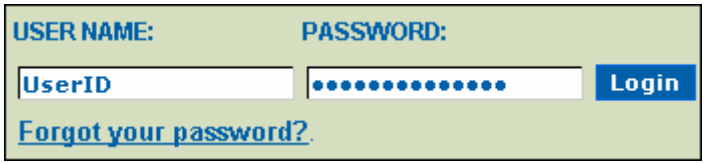
APPROVAL: Approval of your registration comes from your authorizing agent. This is your PAO, your Office Director, or other authorized data manager for the Alumni Archive.

Note: Confirm with your PAO or Office Director that he or she has registered with the Archive, only they can authorize your usage. Once you have received an email notifying you of your approval to login to the Alumni Archive, go back to the login page of the site and follow the login directions.

Login

GO TO: http://alumniarchive.state.gov

ENTER: Your User ID and Password



PRESS: LOGIN

Home

The Home Page is where you may select the area of the Alumni Archive you want to work in. There are three main areas of the site.

Area 1. UPDATE ALUMNI INFO

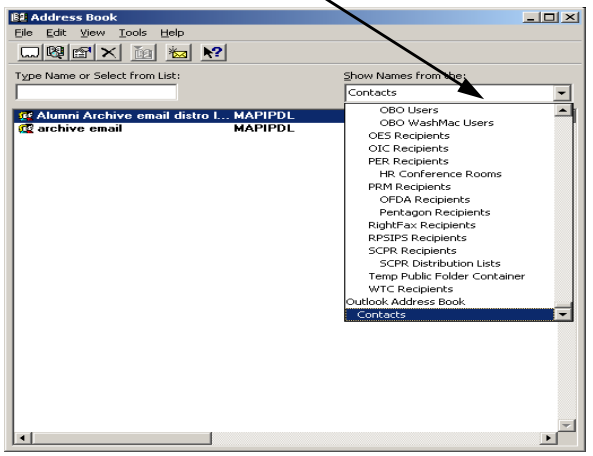
Go here to look for the Alumni, and update their records. You will be able to find groups of Alumni, and edit their addresses, phone numbers, and other contact information. If you need to access more than 499 records at one time, use the create and print area.

Area 2. CREATE AND PRINT

Create Mailing Labels here, Print Contact Lists and do more specific searches of alumni. Print out reports on numbers of alumni or counts by a variety of selections.

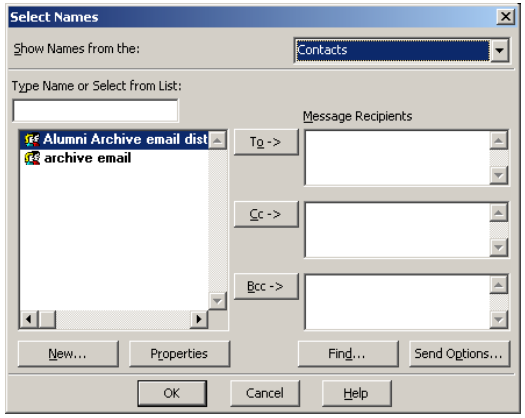
To locate your Distribution list from this Address Book window click on the drop-down menu under "Show Names under the:", scroll down to the bottom, select "Contacts", and find your list.*

You may save as many distribution lists as you want.



Note: On some versions of Outlook the list will be saved under your Personal Addresses such as "YourLoginName Addresses" instead of "Contacts".

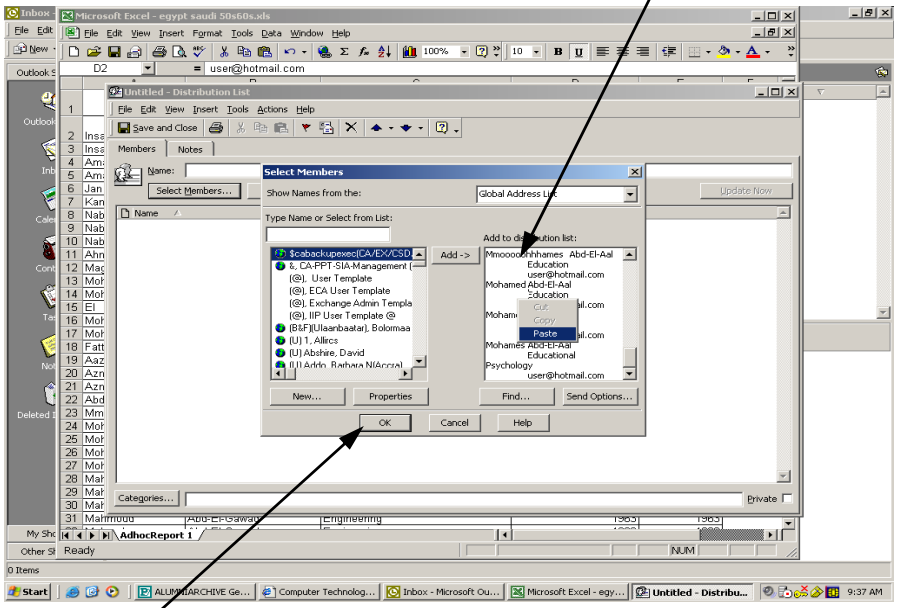
You can also access the list from the To line of any message. Use the distribution list rather than selecting individual names from a sheet.



Any help needed in creating mailing labels, contact lists, or distribution lists—contact the alumni staff at:

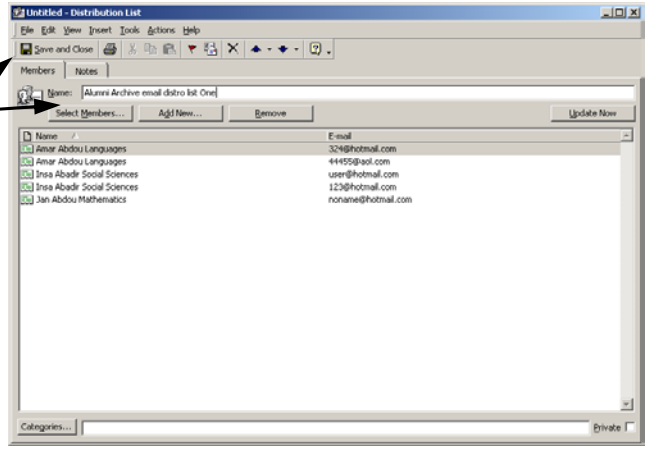
alumniarchive@state.gov

Next: Click back into the Outlook Address Window called "Select Members" or "Edit New Personal Members Distribution List". Right Click in the blank box on the right and select PASTE. The names and email addresses of the Alumni from your spreadsheet will show.



Click OK.

Name your Distribution List



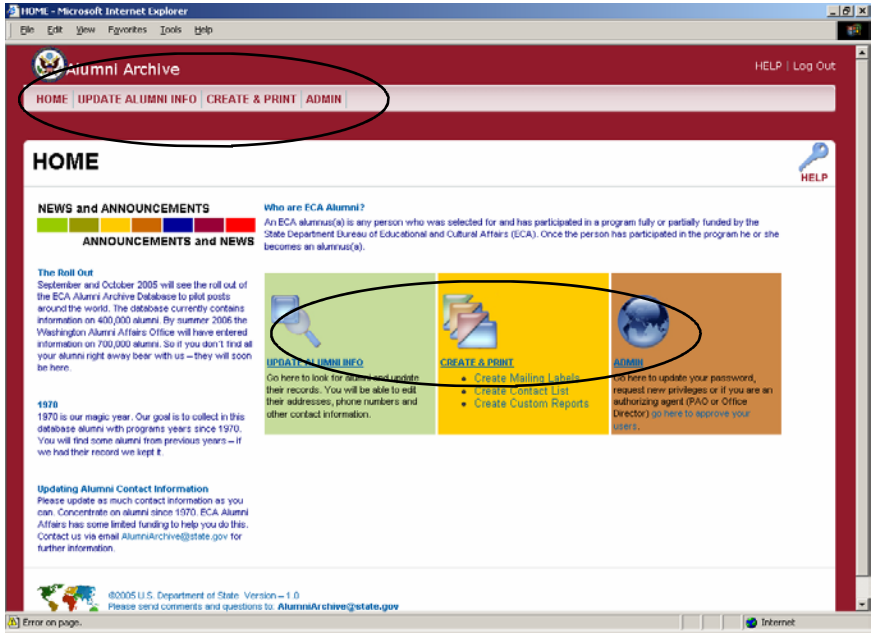
Click SAVE & Close(or click Apply and then click OK)

Now you have a Distribution list that may be reused.

Area 3. <u>ADMIN</u>

You can update your registration data, if your contact data, assignment, or role has changed. Please do this ASAP. PAOs and Office Directors will have access to some additional admin pages -

see the section "For PAOs and Office Directors".



<u>CLICK:</u> You may click on either the picture, or the textual link for each area.

Or click on the navigation links in the navigation bar at the top of each page, to go from one area to the other.

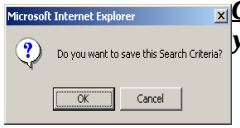
How you find Alumni

From the Home Page, click on "Update Alumni Info"

To Update Alumni Data, you must first look for the alumni using the search tool. After you select or enter from a variety of different options, you may also "save" your search for use at a later time, thus eliminating the need to select the same search criteria every time.

Formatting Tip on SAVE:

OK allows you to save your search and name it.



CANCEL means to proceed with the search and give you the results, without saving your search.

Search for Alumni to update by the following options:

Name (First or Last/Family)*
Gender
Country From*
Country To
Program Type*
FY Year
Program Start Year
Country of Residence
Citizenship

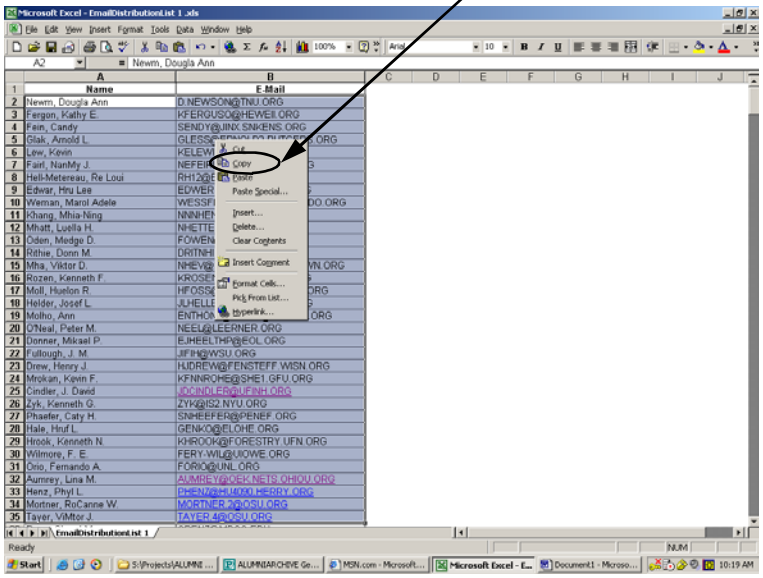
* Indicates the only search fields where information is 100% complete in the Archive. If searching by another category such as citizenship or gender, you may not see all the alumni for your selection.

Any combination of the above fields will bring you a list of Alumni whom you may then select and edit individually. Once you have made your choices to search by, then you press "SEARCH". The **Search Results** page will appear.

Note: ***If there are alumni based on the search you have specified, a list will be displayed with the results. If you have narrowed your search too much or the records don't exist in our archive yet, a 0 results may be noted and you will be given the opportunity to refine your search and try again! You will also get a refine your search and try again! You will also get a message if your search is over 499 records, in which case you can use the create and print section to create large lists of alumni.***

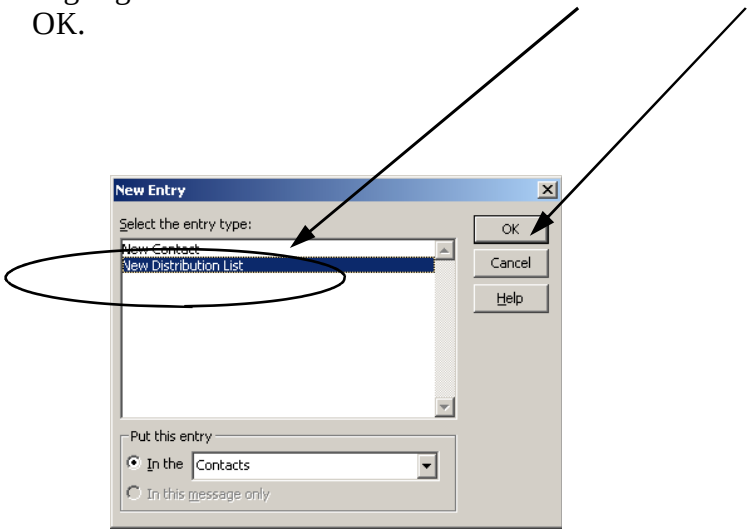
Leave the window that appears open and click over to Excel, highlight the rows under the Name and Email columns (up to 150 rows).

Right click on those columns and click on Copy.

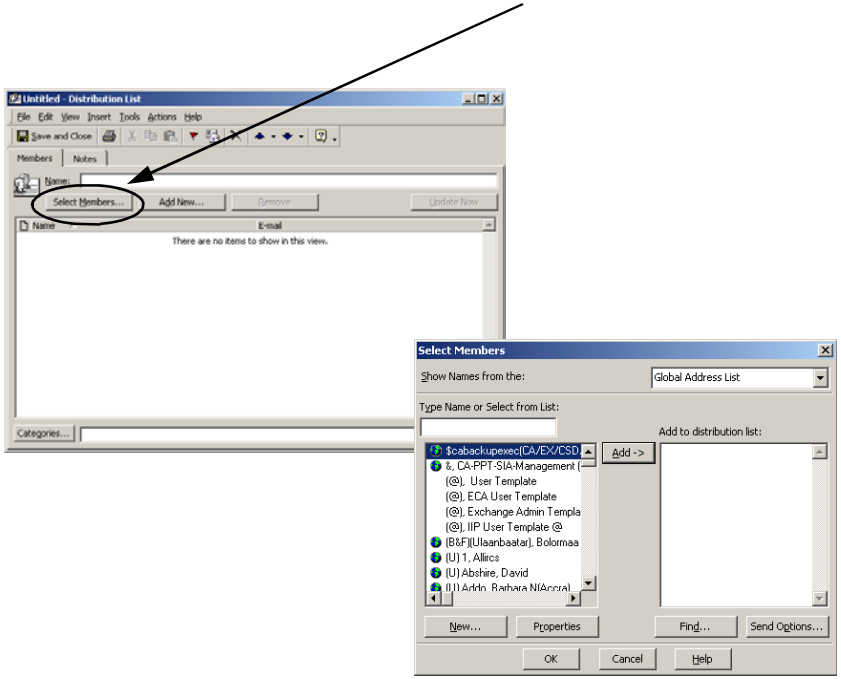


The box called New Entry will open up.

Highlight New or Personal Distribution List and Click OK.



Then Click on Select Members or Add/Remove Members.

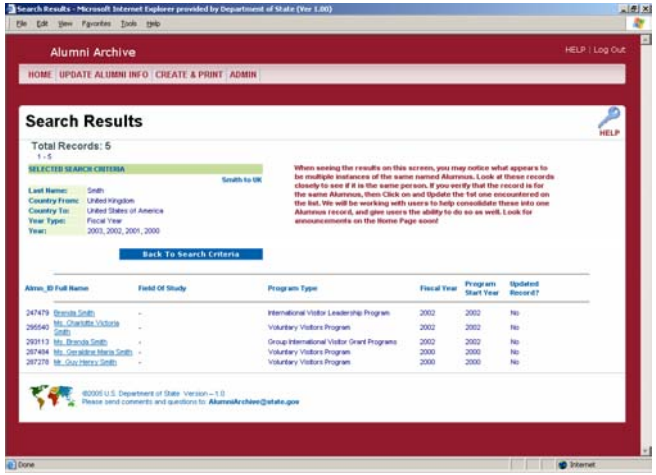


Selecting Alumni to Update

Once you have made your selections on which Alumni you want to Update… then you will be presented with a list of those that match your search criteria.

The results will bring you a list of Alumni by Name, Field of Study, Program type, FY and Program Start Years, as well as an indicator as to whether or not they have been updated.

By default the page is displayed in alphabetical order by "Name". To sort the page differently, simply click on the column heading and the list will be resorted in order by that column type.

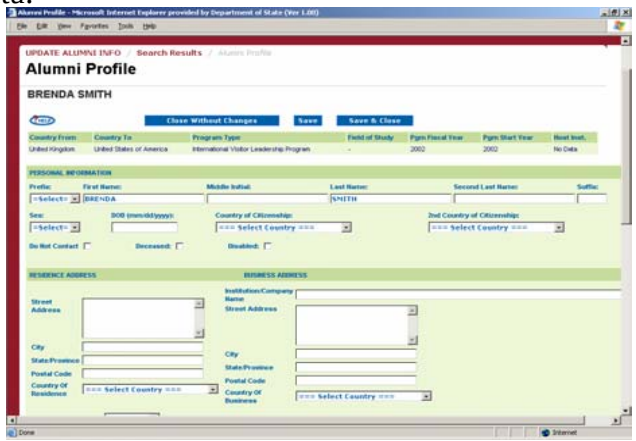


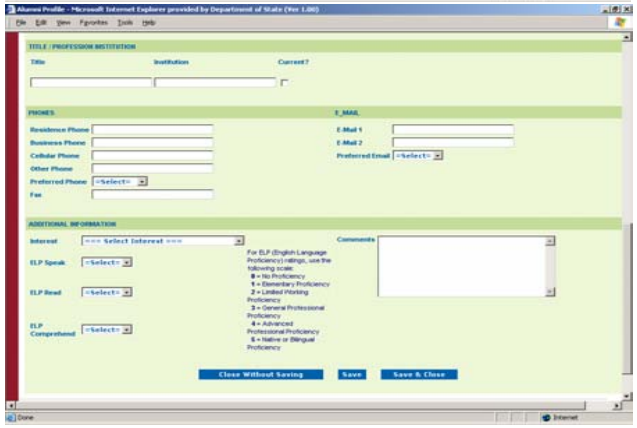
To get to the Alumni Profile page:

To go to an Alumnus(a)'s record so that you may update their information, simply "**CLICK**" on the name! This action will open up their record for updating.

Updating an Alumni Profile

Once you have selected an Alumnus(a) from the results page, their profile page will appear. From this page you can update all of their personal biographical data.

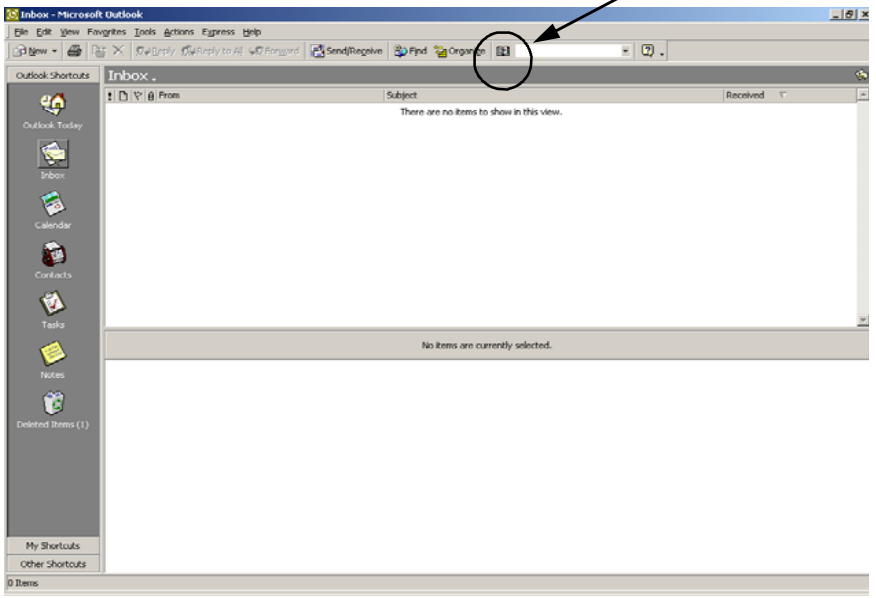




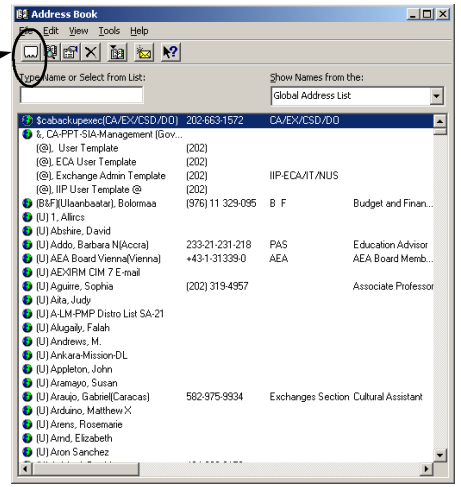
***Note:* You will not be allowed to edit any of the Alumni historical Program Data such as Program Type, FY yearor Year of program start. You will also not be allowed to edit a Alumnus's Last/Family name. If you believe that some of this data is inaccurate, please notify the alumni data manager at alumniarchive@state.gov for processing.**

***Note:* When updating, if alumnus's gender is not noted, *please* select the proper gender.**

From your Microsoft Outlook email box, do the following: Click on the Address Book icon which is located in the top menu bar. And the Address Book will appear on your screen.

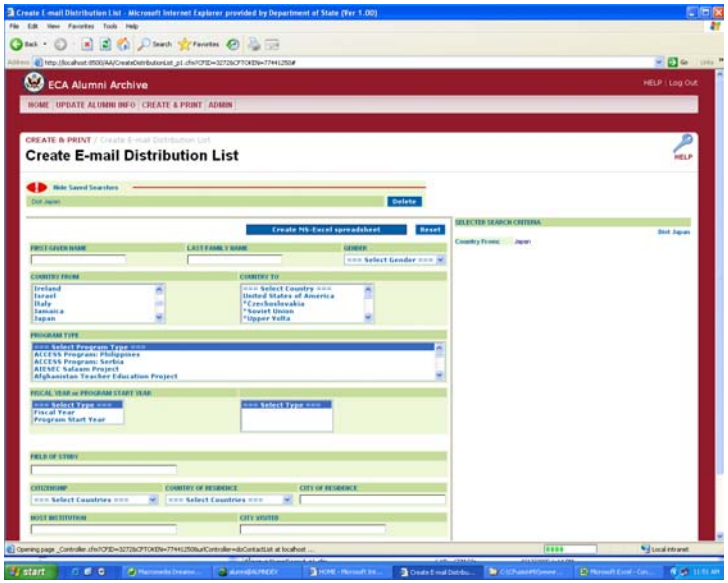


Next Click on the White Icon that looks like a Rolodex paper, called "new entry".



Create Email Distribution List

To create an email distribution list for large groups of Alumni, click on Create an "Email Distribution List" in the Create & Print section of the Alumni Archive*.



Make your search selection and click Create MS Excel spreadsheet and then click Open.

Any alumni records that contain email addresses, will be listed in the email distribution list created. Leave the spreadsheet open on your desktop, and Open Outlook Email.

Note: You will usually not be able to save a Distribution List in Microsoft Outlook containing more than 150 email addresses in the list. Your DOS email server usually restrict the amount of emails that can be delivered from your state.gov address to make sure they are less than 150. Also note that some DOS network e-mail servers may limit you more and some may limit you less.

Updating an Alumni Profile (cont'd)

Special Formatting Tip:

When adding or updating an Alumnus(a)'s address be sure to enter it in the format you need for mailing labels! Original address data in the Archive is consolidated in the Street Address fields. Please drag and drop the address information into the proper fields when updating the Alumnus record. This will make for better mailing labels in the future!

The Alumni Archive application will allow you to print mailing labels for your alumni in the *Create and Print* section of the application.

Frequent Updates

You may save and update an Alumni Profile as many times as you like. Historical data like position, profession, and institution will be saved automatically. As you gather more information on a particular alumnus(a) you may return to the individuals' record again and again. Each time you update and save your changes the "updated" indicator will note that you have done so on the summary page.

Check Boxes

When updating an Alumnus(a), note that you may indicate whether the person is "Deceased", if the Alumnus(a) has chosen to be a "Do not Contact", or even if they are "Disabled". By maintaining this type of information on Alumni, you will be able to determine if they should be included on special mailings or contact lists!

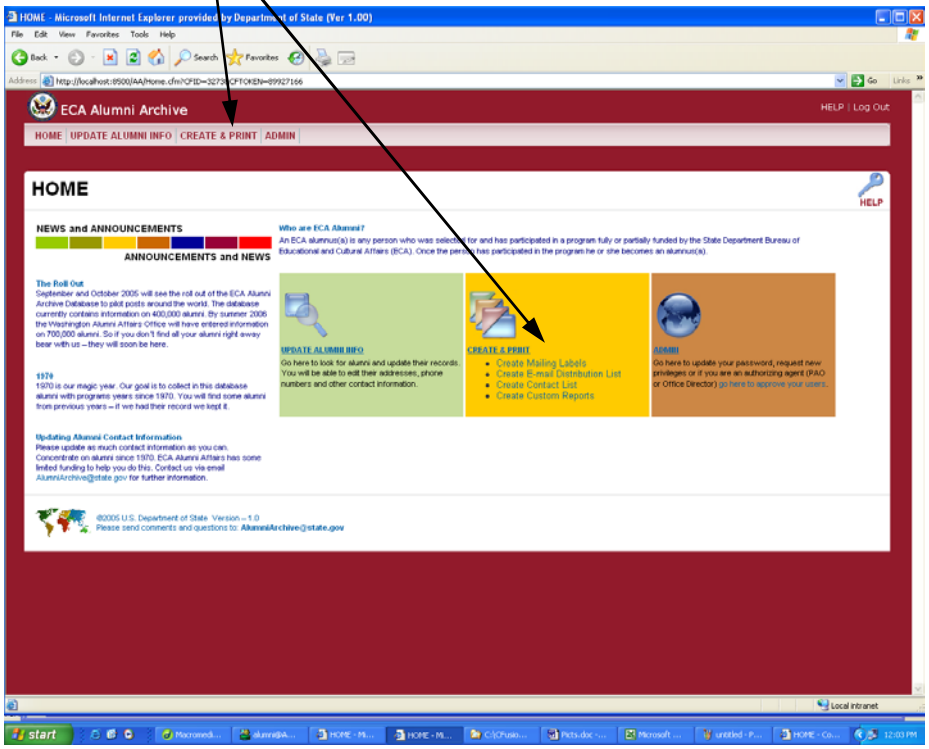
Preferred Address Indicator

Use this field to indicate which address the Alumnus would prefer to be contacted through, residence or business. By choosing one, the mailing lists will use that one. If none is checked the default is first to use Residence. If Residence has no data then, Business is used. If neither contain data, mailing labels will not be generated for that record.

Create and Print

The Create and Print area of the Archive is where you will go to generate Mailing Labels, Contact Lists, Email Distribution Lists, and Statistical Reports, that you will want to print out and utilize in your effort to re-engage Alumni!

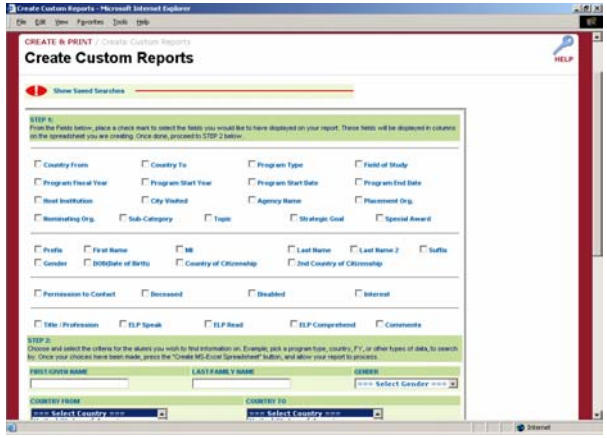
To enter this section of the Archive go to the home page and click on the area titled Create and Print, or choose this selection from the Navigation bar at the top of the page.



Note: Last Name, Country From, Program Type and FY or Program Start Year are the only search fields where information is 100% complete in the Archive. If searching by another category such as citizenship or gender, you may not see all the alumni for your selection.

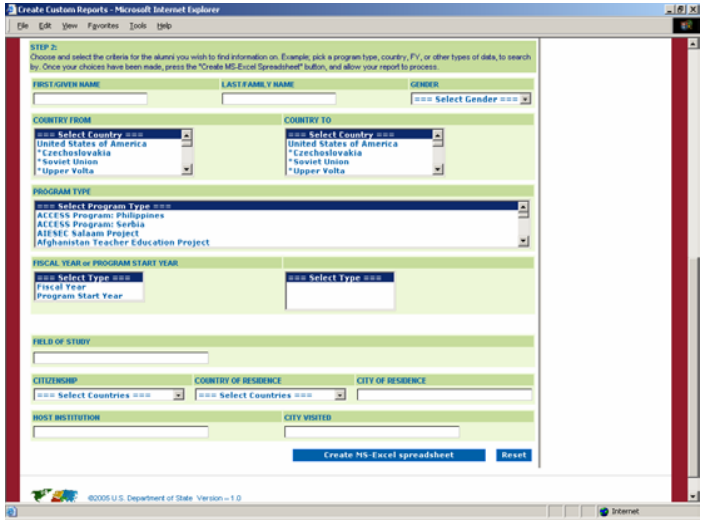
Create Reports

Creating a custom report is one of the Advanced features of the Alumni Archive. We will be adding statistical reports, and graphs to this area in the future.



STEP 1 - From the Fields offered, place a check mark to select the fields you would like to have displayed on your report. These fields will be displayed in columns on the spreadsheet you are creating. Once done, proceed to STEP 2.

STEP 2 – Choose and select the criteria for the alumni you wish to find. Example; pick a program type, country, FY, or other types of data, to search by.

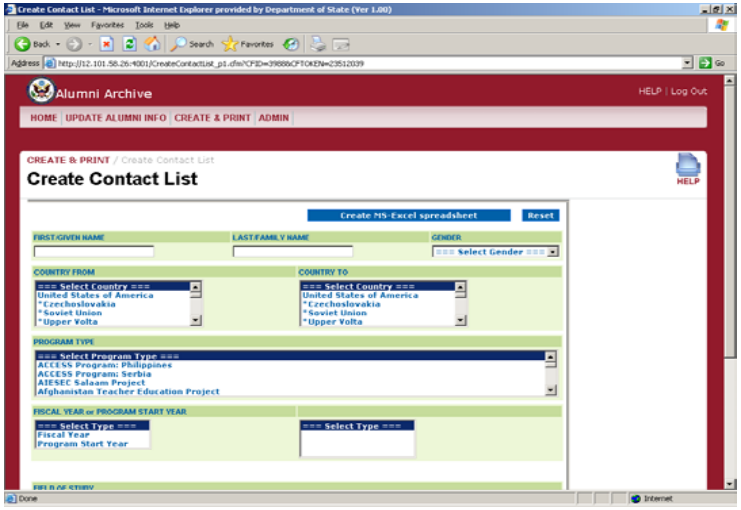


Once your choices have been made, press the "Create MS-Excel Spreadsheet" button, and allow your report to process.

You may save it and edit the information in Excel, just as you do with mailing labels, and contact lists.

Contact Lists

Contact Lists are created in a similar fashion to that of Mailing Labels.



You Search for the alumni you want to create a list for, and then you save that list as an excel spreadsheet. You may then use that spreadsheet to contact the alumni. Once the information is in an excel spreadsheet you may sort, format, and edit the data any way you like.

Remember - if you want to EDIT alumni contact information, you should edit in the Update Alumni area of the archive, not on the excel spreadsheet, this way the updated information stays in the database and you don't have to re-edit spreadsheets continually.

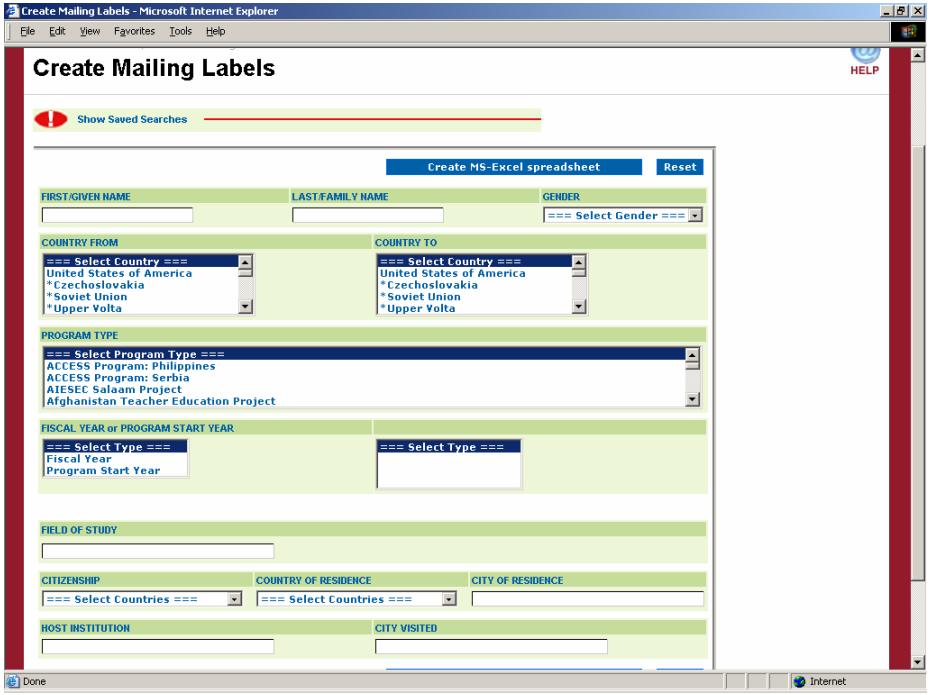
Create Mailing Labels

This section may be one of the areas of the website that you use the most after updating your alumnus(a) data.

GO to: Create & Print

CLICK on: Create Mailing Labels from the Create & Print area.

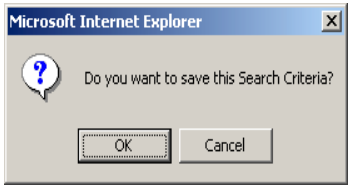
SELECT: Select the Alumni you wish to create mailing labels for. You may create mailing labels for as many Alumni as you want.



CREATE: Click on the option to Create MS Excel Spreadsheet

SAVE: Once you have made your selections, you may SAVE your Search so that each time you return to the mailing label section you can find the same type of alumni. You do not have to Save however, and may proceed directly to creating your mailing labels.

Formatting Tip on SAVE:

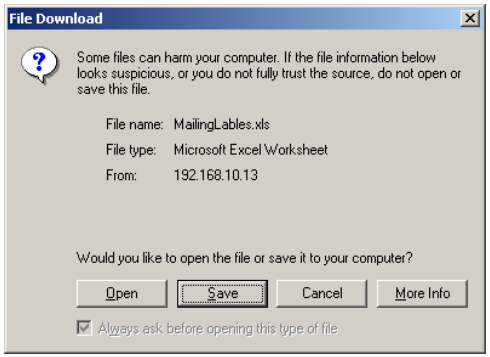


OK allows you to save your search and name it.

CANCEL means to proceed with the search and give you the results, without saving your search.

If you save your search—name it appropriately so you may reuse it in the future.

OK or Cancel wil both give you the following File Download Notification. **Press: SAVE**



Reuse of the format for labels

Each time you save a new set of data from the Archive for mailing labels, you can reuse the format from your saved template from your previous set of labels. Doing this makes it very easy to generate new labels.

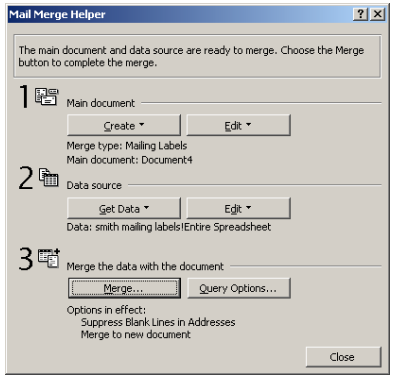
When you Saved your generic Document1 as a TEMPLATE, during the steps on page 16, you saved the "format" of your address labels.

How To use Template:

- Follow instructions on pages 11-13 to create a group of mailing labels out of the database. Save them as an Excel worksheet.
- Following the instructions on page 14 do the following:
- Go to MS Word.
- Click on File, New and select the "Archive Labels" as your document type.
- You'll see the format of the labels that you had already saved, in your new document.
- Next STEP:
  - Got to TOOLS, Mailmerge, and proceed to
  - Step #2 Get Data.
  - Open Data source (find your new excel spreadsheet) select and OPEN it.
  - Select MERGE and then select Merge again. .

You're new labels are formatted just as they were before.

Click on the MERGE button and then Merge again, your labels will auto format onto the pages of your current word document. Now you may save, name and print them as you normally do. Save and Close for future use.

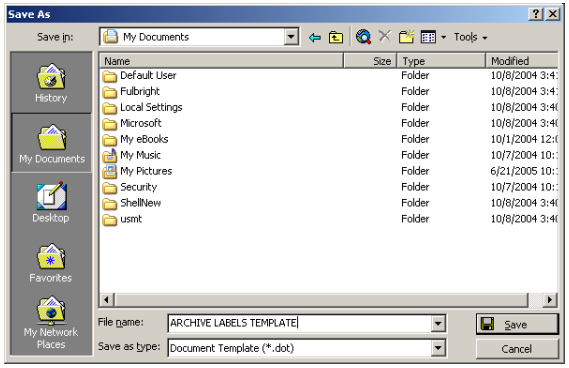


If you wish to same your label format

Once you close the data file, the file which contains your "label format" will be open on your screen. It should be named Document 1.

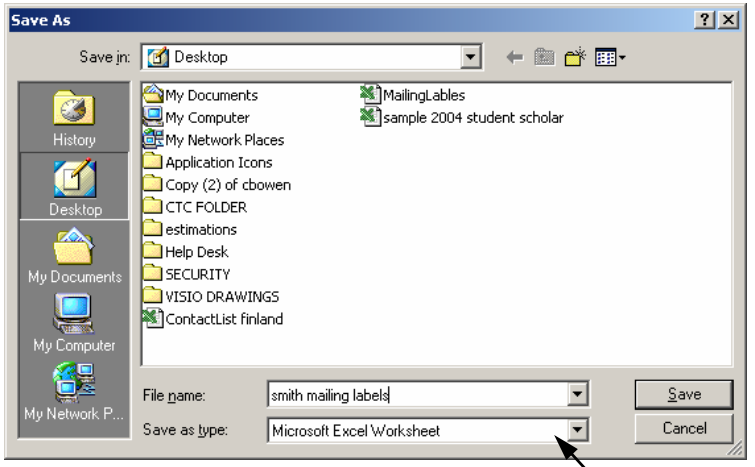
On the Word File named Document 1, Click on File, Save As, and save this files as a TEMPLATE type of file.

(name it ARCHIVE LABELS for future use (see RE-USE section on page 17)



Note: Data in the database is only as accurate and current as you make it. *Labels will only print for those alumni records that contain address information.

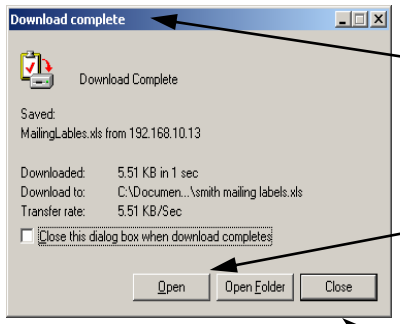
The more you work to validate and properly format the addresses in the database, the better your labels will look.



File name: Can be whatever name you choose

Save as type : MICROSOFT EXCEL WORKSHEET in pulldown

Remember: Remember "Where" you Save the file— you will need to find it again to create your mailing labels.



Once your file is done saving you will see this download complete box.

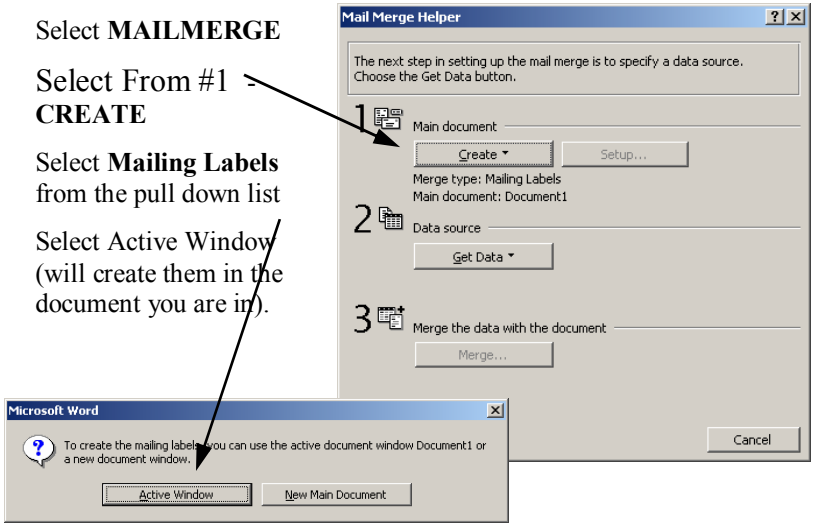
You have 2 choices:

Click **OPEN** to view your new excel spreadsheet and edit the data, once finished proceed to Next Steps on page 14.

Or Click **CLOSE** if you don't need to edit your data, and proceed to Next Steps on page 14.

Next Step

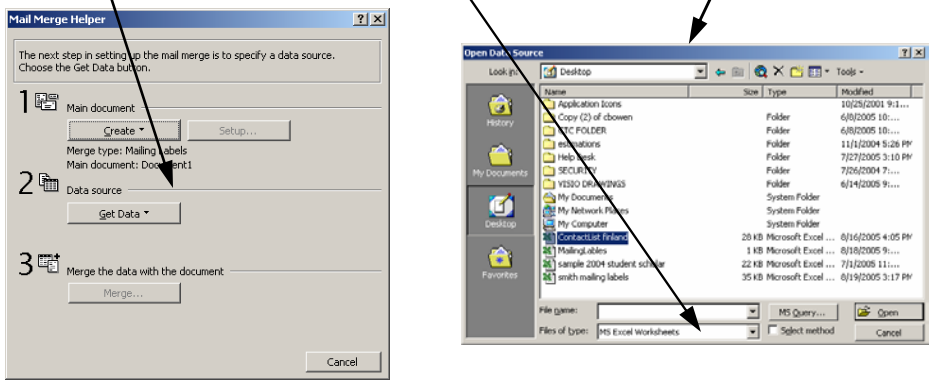
- Open a new MS –WORD document
- Go to **TOOLS**
- Select **MAILMERGE**
- Select From #1 - **CREATE**
- Select **Mailing Labels** from the pull down list
- Select Active Window (will create them in the document you are in).

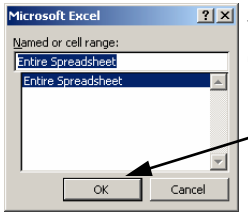


Select From #2 - **Get Data**

Select - **Open Data Source** from the pull down, press enter, and the open data source window will appear.

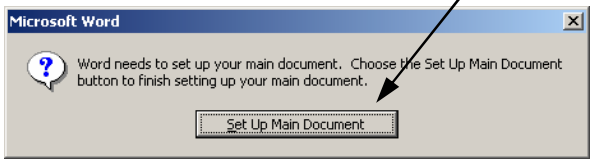
Choose the file type of MS Excel Worksheets, FIND the file you saved in XLS from the Archive. " If you did not give it a name it will be called mailinglabels.xls and be located on your desktop" Select the file and press Open.



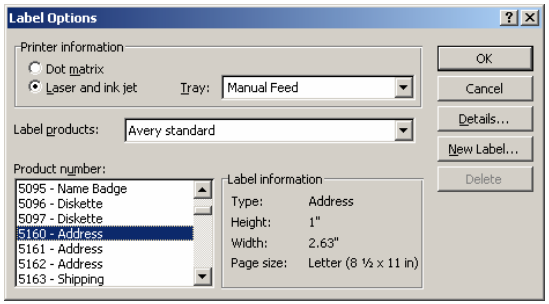


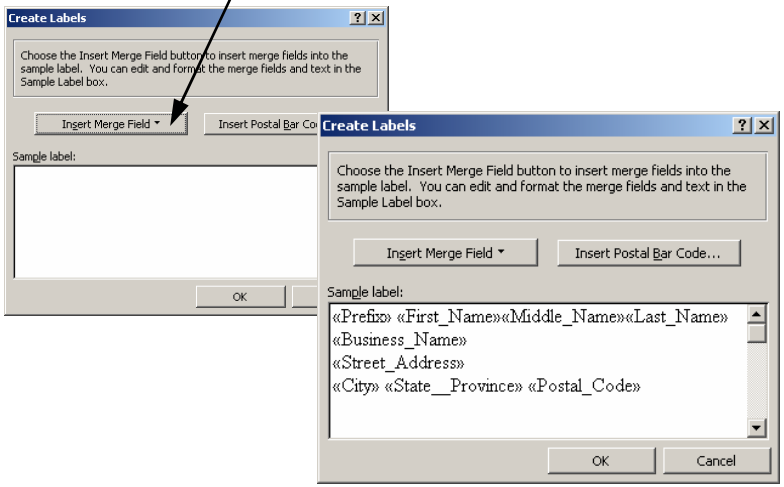
MS-Word asks you to clickOK to use the Entire Spreadsheet .. CLICK OK.

Then, Click on Set Up Main Document.



From here you will be prompted to select the TYPE of Labels you want to create.



Next you will have to set up the format of the label.
Click on Insert Merge Field. And choose which fields you want to display on the label. Put Spaces and carriage returns in to the sample label, just like you want to see them printed out.

When done, click OK.