Notes on CPRO mailing database

(updated July 25, 2024)

This document, updated from ISO guidelines, is a brief explanatory note for using the database of recipients of CPRO's printed publications, including the Annual Report, the Bulletin and ad hoc materials.

The manual consists of five parts. Parts A and B explain the database composition and target recipients. Parts C, D and E lay out steps for making e-customs declaration with HK Post and mailing procedure of CASS.

A. Data fields

Please refer to "status" to see the categories of recipients. For any doubts please ask **Joyce Ng** of the editorial team.

Status		Description	Category		Remarks
1	CU-1	Internal units/ departments	1	C_mgt C_mgt_offr	• management units • university officers
			2	C_col	• nine colleges
			3	C_adm_sev	• professional and administrative services units
			4	C_acd C_acd_dept C_acd_prof	• academic units; • academic departments (63) • professors-at-large
			5	C_acd_oths	• others academic units
			6	C_rsh C_rsh_inst C_rsh_ctr C_rsh_join C_rsh_key	• research unit • research institutes • research centers under institutes • join laboratories (no more update) • state key laboratories
2	CU-2	Others CU units	7	C_fac C_su C_hst C_org C_can	• facilities (e.g. bank, operators, etc.) - <mark>DROP</mark> • student unions • student hostels/halls - <mark>DROP</mark> • staff organizations • canteens - <mark>DROP</mark>

Status		Description	Category	Remarks
3	CU-I/ CU-sp	CU-related individuals/Special order (from CU-related individuals/organisations)		• Add remarks to state the relationship • Existing entries include donors, retired CUHK officers, college orders, foundations/corporates supporting CUHK
4	Coun	Council Members		• SEC has advised they will not receive e-versions so there is no need to mail them. CPRO should send SEC e-versions of all publications for it to forward to the members. Need to change the number of each publication to be sent to "0"
5	Prof	Emeritus Professors		• Keep updating (To sort out with HRO)
6	Grad	Honorary Graduates		• obtain address information from SEC • check any duplication (update or add new record) • add remarks (e.g. G-law-2020) • either version of each pub (1A; 1BE or 1BC etc.)
27	Fell	Honorary Fellows		• obtain address information from SEC • check any duplication (update or add new record) • add remarks (e.g. F-2020) • either version of each pubs (1N; 1A; 1BE or 1BC + 1BEC; 1CE or 1CC; etc.)

7	Trus	College Trustees		• obtain new address information from CC, NA, UC, SC
				    CC (to be updated);
				    NA (Winnie Lam 7635);
				    UC (Memory Lau 7584);
				    SC (to be updated)
				• for the other colleges, send copies to overseers as required
				• check any duplication (update or add new record)
				• add remarks (e.g. T-NA-2020)
				• either version of each pubs (1A; 1BE or 1BC; etc.)

8	AdBr	Advisory Board of Committees		• SEC has advised they will not receive e-versions so there is no need to mail them. CPRO should send SEC e-versions of all publications for it to forward to the members. Need to change the number of each publication to be sent to "0"
9	Donr	Donors of Colleges		• c/d from previous database • Ask colleges to provide info to update

Status		Description	Category	Remarks
11	Govt	Government		• to relevant departments only • address to section/units heads • #999 for book registration to LCSD (for Annual Report only)
12	LC	Local cultural organizations		• c/d from previous database
13	LI	Local individuals (8)		• c/d from previous database • No new entry
15	LT	Local territory institutes		• to major institutes only • address to VC, PVC, CPR, libraries, etc.
17	OI	Overseas individuals (32)		• c/d from previous database • For overseas scholars
18	Sp	Special request (local/overseas)		• on request occasionally (outsiders e.g. media representatives)
19	2nd	Secondary schools		• c/d from previous database • address to principal and student unions (one copy each)
20	OC	Overseas cultural organizations		• c/d from previous database, 30 entries
21	OT	Overseas territory institutes (394)		• c/d from previous database • Bulletin only
22	Lego	Members in Legislative Council		• for Annual Report only (1AR) • annual checking before distribution • add remarks (Lg-2020)
23	Exco	Members in Executive Council		• for Annual Report only (1AR) • annual checking before distribution • add remarks (Ex-2020)
24	EduC	Members in Education Commission		• for Annual Report only (1AR) • annual checking before distribution • add remarks (EduC-2020)
26	Cons	Consuls (126)		• c/d from previous database, AR only • To continue

Status		Description	Category	Remarks
90	Ai	Alumni		• No new entries needed
10		Newsletter as request/Subscription		• <mark>No new entries,</mark> as newsletter is no longer printed

Points to note:

- When adding new entries, use capital letters for surname e.g. CHAN

- Avoid simplified Chinese characters as it may not enter properly into the system

- Since the system does not have a delete function, if any existing recipient no longer receives our publication/passes away, please **leave blank** the cells that indicate the number of publications (AR, BC, BE, BCE etc) in their entries.

- Each recipient has a "receive ID" unique to themselves, which is randomly generated

- To find out who are recipients of a particular publication e.g Annual Report, select "Publication filter: Annual Report" in "Export to Excel" button. An Excel sheet will be generated. If we want to group the recipients by their "status", use the "sort and filter" function in the status column of the Excel sheet.

- **For each production** of print materials, check the total number of copies to be printed by getting the Excel sheet with filter "Publication filter: Annual Report/Bulletin". Can further break down the number of copies needed by each category by using the filter function (by category) in the mailing database.

- For **Bulletin**, find in N Drive Bulletin – No_1_2024 folder – Label – "231030 Bulletin label summary Brian" excel sheet for reference

- For **Annual Report**, find the estimate sheet in 2021-2022 folder

B. For Individual Publications

Publication	Code	Remarks
Bulletin	BE / BC BEC	• English / Chinese versions • bilingual version for supplementary issue • two-times per year (except occasionally supplement) • labeling by name or by company • for Zone 5 (i.e. overseas), mark the label with the zone number (as HK Post Office) • allow around 200 copies of each version as stock • envelope (in white) with reply box on the back • #>=9000 personal copies (internal staff) (note: -- for those opted to have either version after internal audit exercise -- no new entry; to be faded out gradually; -- add remarks: "For Bulletin only") • already registered with the LCSD as on series i.e. no need to send 'book registration' form; 5 copies for each version
Annual Report	A	• bilingual version • one-time per year • labeling by name or by company • for Zone 5 (i.e. overseas), mark the label with the zone number (as HK Post Office) • allow 200 copies as stock • "AR only" for Lego/Exeo/EduC Lego Dir: https://www.legco.gov.hk/general/english/members/mem_contact_dir.htm Executive Council: https://www.ceo.gov.hk/exco/eng/membership.html Education Commission Membership: https://www.e-c.edu.hk/en/membership/index.html (https://webb-site.com/dbpub/officers.asp?p=20909&sort=resdn&d=2021-12-06&u=0) • check the **donor** list as in appendix of AR; find out the one who are already on our list; inform OIA (Sam Sin 37303) and ask for the total number of copies required (#3624) • send 'book registration' form to LCSD after published (#999); 5 copies for each version • to be tabled at council meeting in January
Facts and Figures	FFE / FFC	• English / Chinese versions • one-time per year • internal distribution only • for specially marked units only • to be tabled at council meeting in January

C. Notes on mail zone / zone number

Mail Zone classified by CUHK	Zone Number by HK Post*	Remarks
1	--	• internal circulation
2	--	• Hong Kong Island
3	--	• Kowloon, NT
4	--	• China, Taiwan, Macau
5	The Mainland/Macao/Taiwan	• China, Taiwan, Macau
	1	• Asia (except Japan)
	2	• Japan, Oceania, Europe (except Eastern Europe and Scandinavia) and North America
	3	• Eastern Europe, Scandinavia, Russia, South America, Africa and other destinations

according to the classification of HK Post Office:
https://www.hongkongpost.hk/en/preparation/posting/zoning/index.html
Check if there is any updating with CASS/mailroom

E. E-Customs declaration for overseas mail (as HK Post Office)

Mail Zone	Regions	Remarks
4	China	• need declaration for each label • by **surface** mail for Guangdong province, Shenzhen • by **air** mail for others
	Taiwan	• no declaration required (to check if required for books?) • by air mail
	Macau	• no declaration required (to check if required for books?) • by surface mail
5	Overseas	1. Destinations that need declaration for each label • Updated list of destinations can be found here: • https://www.hongkongpost.hk/en/other/2020/ecustoms/index.html • Log in **HK Post 投寄易** to do electronic customs declaration: • https://ec-ship.hongkongpost.hk/platform/index.jsf?lang=zh_hk • Account: CUHK_ISO • Password: CUHKiso2021 • Select "Bulk Mailing" – "Upload electronic customs data" • Refer to this step-by-step guide left by IT Team's Brian: N / Mailing label / pubs_db_distributions/ sources / HKPost eCustoms Recapping here: "下載範本" to fill in the address and customs details, in five batches: China, Macau, Taiwan, CUHK Zone 5-1 (Asia), CUHK Zone 5-2 (Japan, Oceania, Europe) Brian says we can do clearance by country – refer to the **list of country folders** for 2022-23 Annual Report mailing. Filter the addresses in Excel 2. For destinations that do not need declarations • check updated services availability with HK Post Office https://www.hongkongpost.hk/tc/about_us/whats_new/notices/index_id_1047.html (2021.03.31) • In our database, enter "country", "Publication Filter: Annual Report/Bulletin"

F. General steps for mailing

- For **Bulletin**, find in N Drive Bulletin – No_1_2024 folder – Label – "231030 Bulletin label summary Brian" excel sheet. In our database, choose relevant status + "Publication Filter: Bulletin" to see number of recipients by category. Name the label file by category and pass to Pony.

- For **Annual Report**, Brian says we can do clearance by country – refer to the list of country folders for 2022-23 Annual Report mailing. Filter the addresses in Excel.
- Also refer to the guide on Notion – CPRO Home – Useful Resources – "Mailing Procedures" updated by IT/Creative team (July 2024)

- Both internal and external distribution done by CASS (contact 華)

- normally dispatch internal copies before the external

- for internal:

    o Use mailing database to export label (refer to Notion "print label flow", generate by "category"

    o pass the labels to CASS

    o by reused envelope

- for external:

    o For local mail, use mailing database to export label (refer to Notion "print label flow", generate by "category"

    o For overseas mail,

    o pass the labels/declarations to CASS

    o CASS will determine the date for mailing (local and overseas) and pass back a checklist

      according to the checklist, prepare the mailing forms (in duplication with carbon copy)

    o each mailing forms have to be stamped by Kubi (pass back to CASS)

    o by designated envelopes

- for book registration (#999):

    o Bulletin-- already on series; i.e. no need to prepare the form

    o Annual Report -- prepare the form for each issue:

    o https://www.hkpl.gov.hk/en/about-us/services/book-registration/register.html

    o five copies for each versions (mail together with the form)

    o Form signed by Lavender

    o Prepare a dispatch list of official mail for CASS; Kubi to provide "company code" and "account code" to fill in

    o send to LCSD in parcel