

Introduction to



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Acknowledgements

A very big THANKYOU to Westwood Forster for allowing me to use the Visual Alms logo.

This manual is one in a series developed at The City University, London for training courses which I developed for the Visual Alms installation there. While City does not officially endorse these manuals I would still like to thank them for my time there and the learning experiences it afforded me.

Janice Sorrell Sept 2002

Course Aims

This course will provide you with an introduction to Visual Alms – City’s contact management database. As well as providing an overview of the system it will give you the practical knowledge of how to read the Alms records, the etiquette for using the information, guidance on data protection and the ability to customise the system for your use.

What’s in this session

- ◆ Log In, The Desktop and Opening a Record
- ◆ How it all began and the big picture
- ◆ Data Protection and Etiquette
- ◆ On the Record
- ◆ Coffee/tea/cake
- ◆ System Overview
- ◆ Something to play with
- ◆ Reading some records
- ◆ Log Out

Log In

This is what you have come to see, so let's launch straight in.

- ◆ Double-click the Alms Live System icon on your desktop

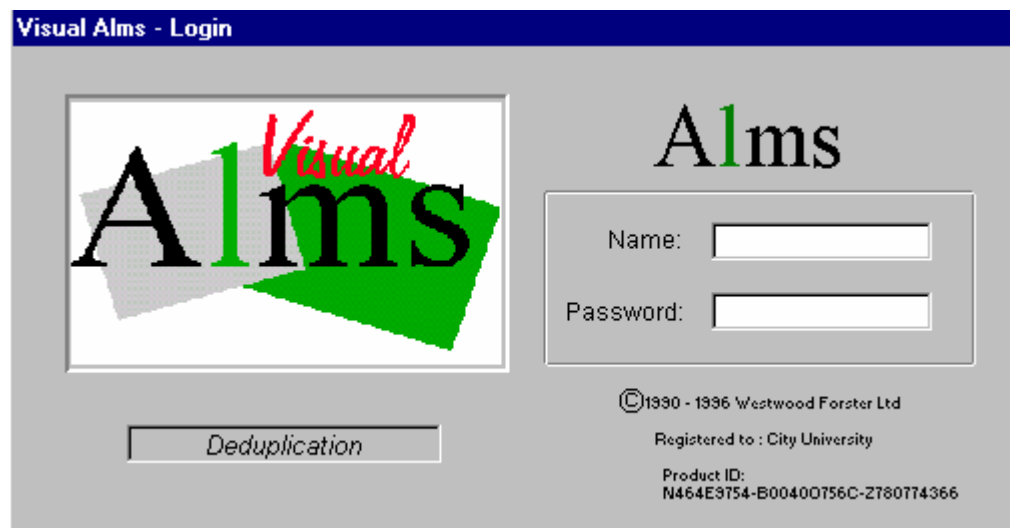


You may be asked to

Connect As: cityalm
Password: westwood23

(This provides a drive mapping to the server where the Alms database lives. You may even have been asked for this when your machine was first started up. The Business School has a script which should fill this in automatically, but just in case...)

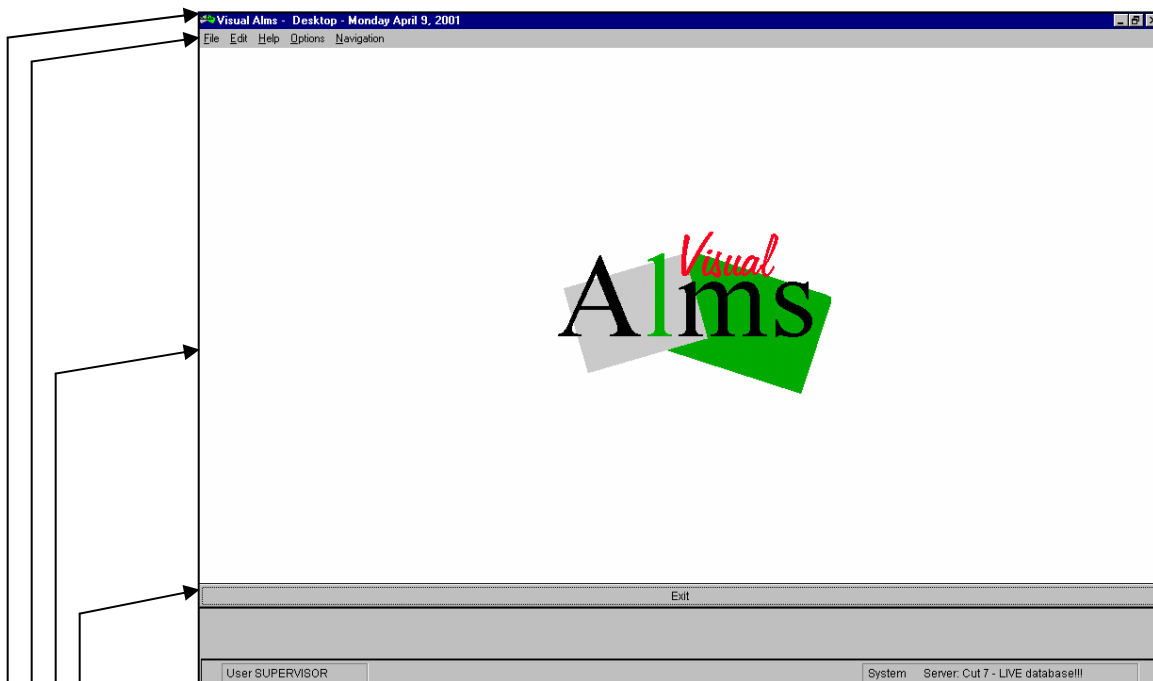
- ◆ You should get up a screen as follows that asks for your User Name and Password.



Now don't worry that the picture might be different or that it gives you a different word for the day. Alms gives different pictures and words each time it logs in.



Passwords – We've just given you two new passwords to play with. As with all passwords these are for *your use alone*. They give you access to the system and usually only to the parts of it that will be useful in your job. They also allow the system administrator to track what's been happening on the system and who has been doing what so that they can check the data is OK.

- ◆ You are then presented with....





...the **Visual Alms Desktop**

Let's just go through the elements of this.

- ◆ At the very top, the blue bar otherwise known as the Title Bar, tells you the name of the program and give you three buttons.  The first minimises the program down onto the Task Bar which usually lives at the bottom of the screen. The second maximises the program window to the fullest size possible. And the third closes the programme. Sadly, this is where we have to become acquainted with the first of the bugs in Alms. Although for the most part Visual Alms follows Windows standard programming, there are a few places where it breaks down. Closing the programme with the cross icon is one. It doesn't always close the programme down cleanly. Please use the Exit button instead. 

Quick Aside: If you don't have the programme window maximised you can "grab" the window by positioning the mouse over the Title Bar, holding the left mouse button down then move the window around the screen. If you position the mouse over a corner of the window you can re-size the window the holding the left mouse button, dragging the corner in and out and releasing when you get a good size.

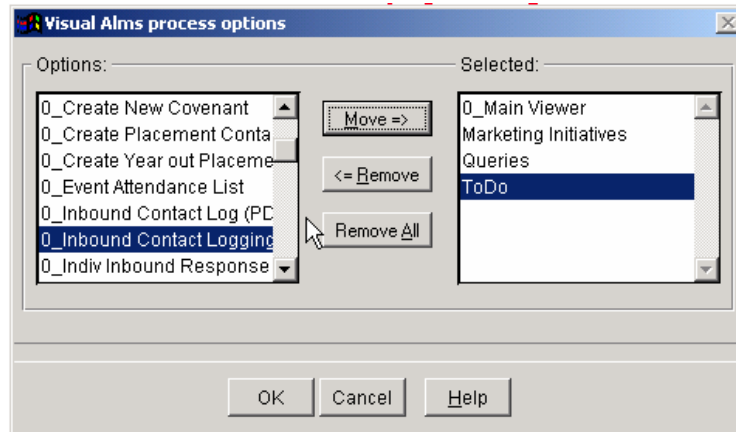
 Alms does not re-size the contents of the window so it is best to use it full screen. The Viewers have been designed under 1024 by 768 resolution. Anything less leaves the edges hanging off the ends of the screen.

- ◆ Next is the Menu Bar . We can customise Navigation to take you to the parts of the system you use the most.
- ◆ We then have the Tablecloth which can be customised with any picture you want.
- ◆ Lastly we have the Button Bar. This is where we have buttons which take you to the Viewers, Processes and Tasks which you use the most.

Customising the Desktop

Putting Buttons on the Button Bar

On the Menu Bar, go to Options, then Amend Desktop. This screen should appear.



On the left are Options for processes, viewers and tasks that you can put onto your button bar. If the option is in pink, this means you do not have access to it. To put an option onto your desktop, use the Move Button to transfer this to the Selected box on the right. Use the OK Button to confirm your selection. This will put you back to your Desktop.

Exercise

Put the following buttons onto your desktop

0_Main Viewer

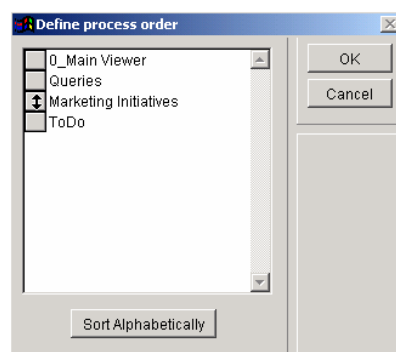
Queries

Marketing Initiatives

ToDo

You can change the order of the buttons by

Options
Process Order



The buttons are listed starting at the left of the screen and working to the right. The number of buttons you can get on a row will depend on the number of buttons you have. Position the cursor over the item you want to move, hold the left mouse button down then drag the item up or down the

list and drop it by releasing the mouse button. You also have the option to sort them alphabetically at the push of the button on screen.

Putting Shortcuts into the Navigation Menu

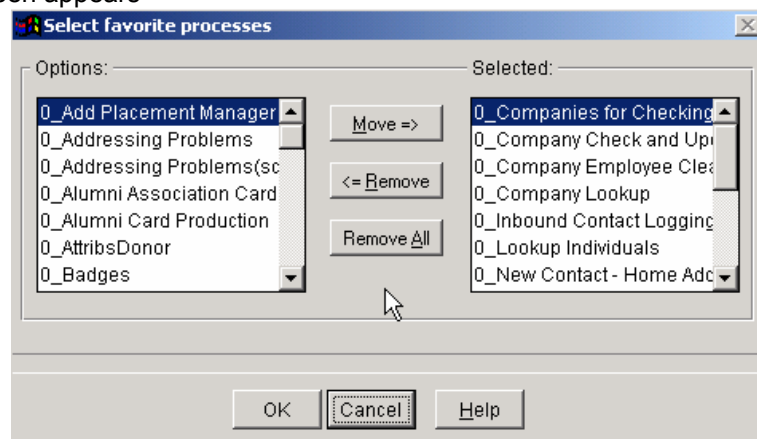
Through the Navigation option on the Menu bar you can go to the other parts of the system. But rather than having to constantly go

Navigation
All processes

We can have some shortcuts here as well. In fact up-to fifteen of them. Here's how. Go

Navigation
Menu Setup

The following screen appears



Just the same as with the Button Bar options. You can now select up-to fifteen favourites for your Navigation options.

Exercise

Place the same options as are on your Button Bar onto Navigation. Also put on
0_Company Lookup
0_Badges
0_Event Attendance List

Changing the Tablecloth

To change the picture you look at whenever you go back to the desktop

Options
Table-cloths

This brings up a list of available table cloths which you can browse through and select the one you want.

If you do want something a bit special, a picture of the kids, your partner, your pet, whatever, you need to have an electronic copy of the image. To be a bit techie here it will need to be a bitmap, that is have a .bmp extension after the file name.

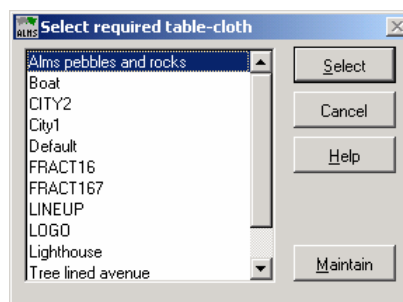
Important Bit

This is the only time where you can use the Maintain Button on any viewer you see in Alms.

Where you see it elsewhere it will do things to the system tables and this is something that should only be done by the system administrator. Changes to the system tables can have massive implications on the use of the system.

In this instance, your not touching system tables, so don't worry.

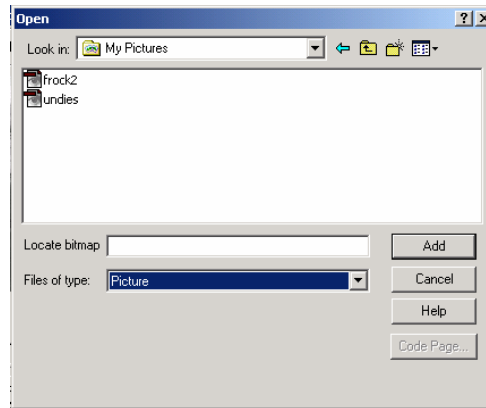
This is the screen where you can choose existing table cloths.



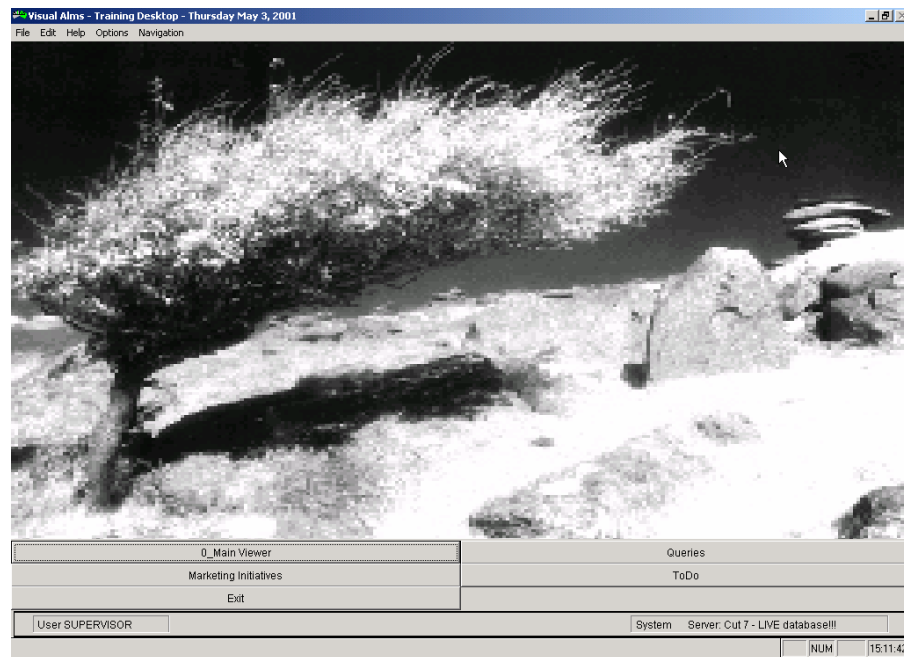
Use the Maintain Button to bring up this screen



And you can then use the New Button to set up a picture of your own. The Bitmap file should be located on your own hard-drive and the screen below allows you to select it.

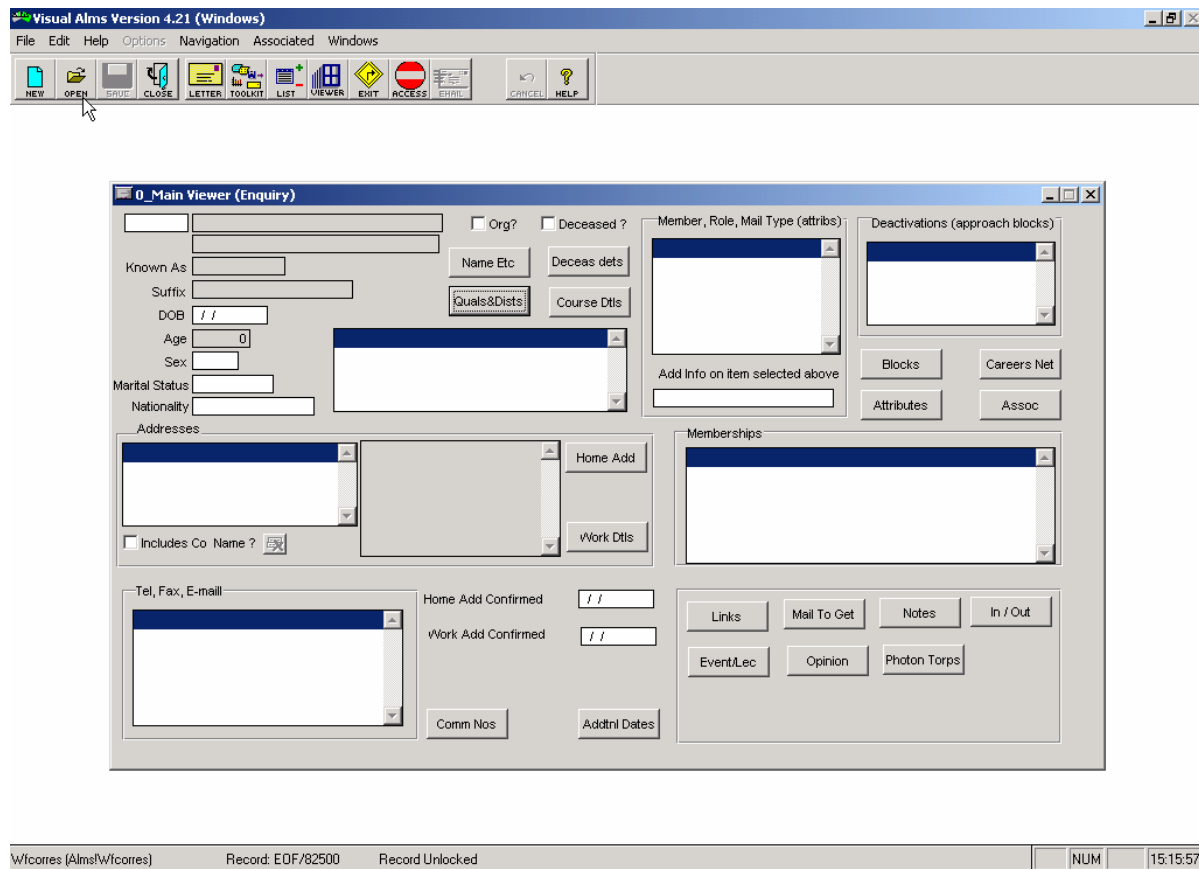


Once you have the picture you want highlighted, use the Select Button to return to your new desktop.



Opening a Record

On the Desktop, push the button 0_Main Viewer. You should now be looking at



This is the main view onto the data in Alms. This Viewer is particularly suitable for looking up *individuals*. 0_Company Lookup is tailored to view *organisations* better than this one.

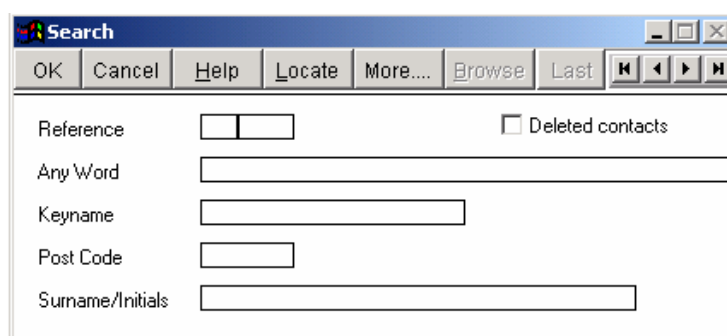
The Main Viewer is a "Read Only" screen. You cannot accidentally delete any of the information here. As such it is ideal for looking up your alumni and other friends on the University.

On the Button Menu (sometimes known as Icon Menu) we have



- ◆ New – usually to create a new record. However you cannot properly create new records through this screen and this button should now be used.
- ◆ Open – to open records. If you already have a record open you use this button to open the next one you want. You don't need to close the first record. Alms does this for you as it opens the second.
- ◆ Save – to save data. But as this screen is Read Only, this button will always be greyed out and the save function unavailable.
- ◆ Close – closes the record and the viewer so this will take you back to the desktop.
- ◆ Letter – brings up the letter process and allows you to produce a predefined mail-merged letter directly from Alms to the person whose record you are in.
- ◆ Toolkit – brings up the toolkit of all the ways to take data out of Alms. For instance by producing a Letter, a Label or a Report; by taking an Export or Advanced Export. As with letters these outputs have to have already been defined through other modules of Alms which you can learn about on the other courses.
- ◆ List – if you want to say do a letter to several people in Alms, you can add them to a list via this button then use the Toolkit to run off a letter to them.
- ◆ Viewer – gives access to other viewers to perhaps look at other pieces of information not available on the current one.
- ◆ Exit – closes down all viewers currently open and takes you back to the Desktop.
- ◆ Access – not currently used in Alms
- ◆ Email – not currently used in Alms
- ◆ Cancel – cancels last action
- ◆ Help – accesses the Help Files

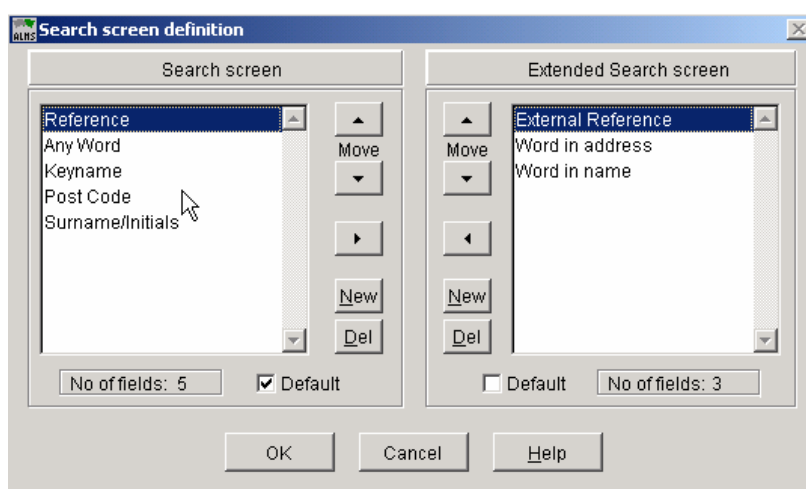
To open a record, take the cursor up-to the Button Menu at the top of the screen and use the Open Record icon.



Reference	<input type="text"/>	<input type="checkbox"/> Deleted contacts
Any Word	<input type="text"/>	
Keyname	<input type="text"/>	
Post Code	<input type="text"/>	
Surname/Initials	<input type="text"/>	

The Search screen above has already been customised. To do this for yourself

More Button then Modify Button



The Search Screen is the one that the Open Icon Button brings up. The list of fields in the box on the left are the ones currently set up to appear in the Search Screen. Use the New Button to add others.

Similarly the Extended Search Screen is accessed via the More Button on the Search Screen. The list of fields in the box on the right currently appears on the Extended Search Screen. The New Button here can add others.

Use the OK button to confirm your selections.

To look someone up on Alms you can

- ◆ Type their City ID into the Reference Field. This is the fastest way.
- ◆ You can also type their surname into the reference field.
- ◆ You can type their surname into the keyname field.
- ◆ You can type their surname space initials into the Surname/Initials field ("SURNAME I")
- ◆ Or any of the other fields

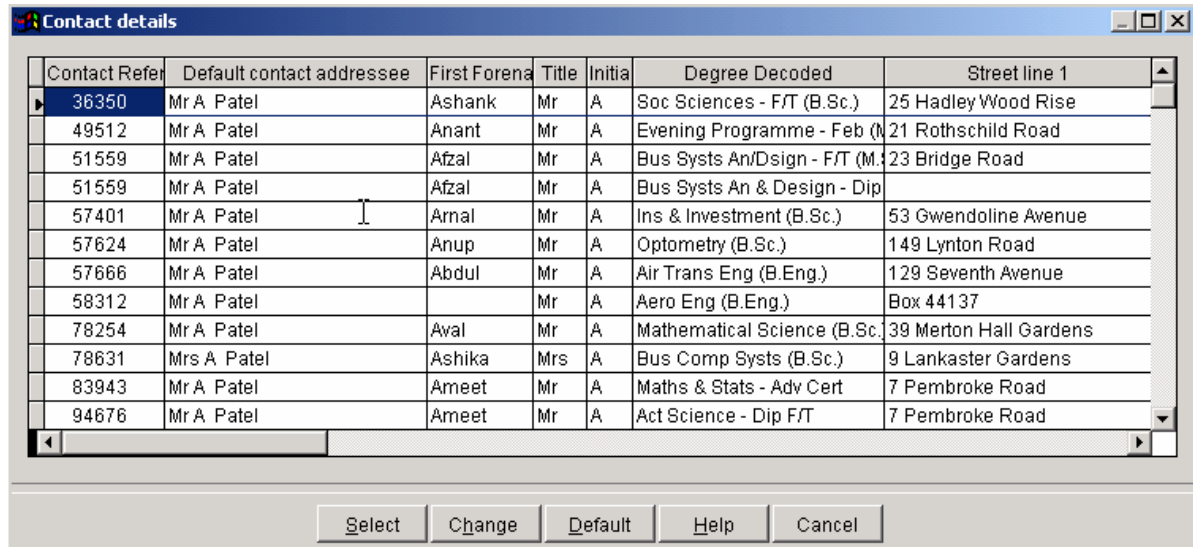
Sadly, you cannot use more than one of these fields at a time.

There's one more piece of customisation I want to show you and this is for the screen that comes up if, say, you have more than one Patel on the system. (Patel is the most common name in the City database, not Smith as if the case with most of these things – no, wait a moment, I've just checked this, Patel 274: Smith 310, as at 03/05/2001, another urban legend bites the dust).

OK, so let's go looking for a record on the system. Let's try Patel anyway.

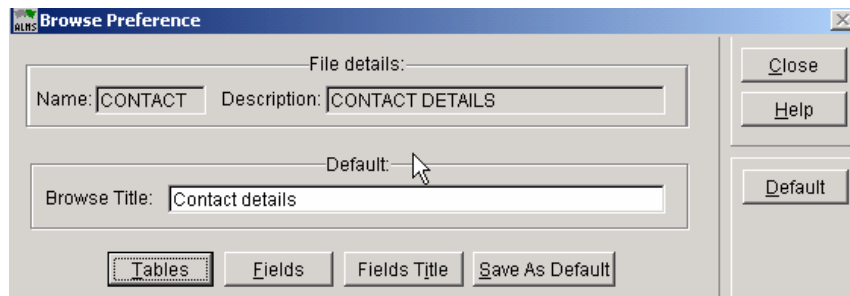
Type "Patel" into the Keyname field

Alms runs a query at this stage and brings back the Browser/Selector Screen like this.



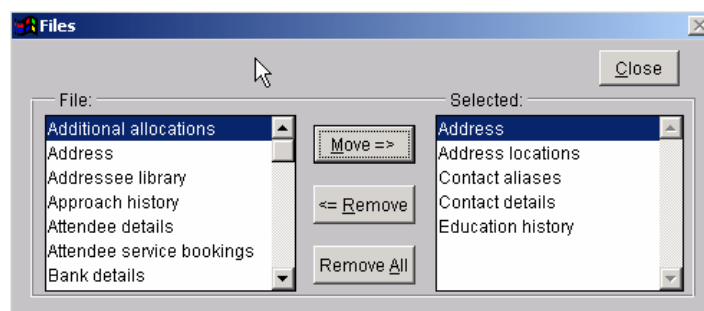
Now, what you have just been presented with, will not be nearly as useful as what we have above. To make yours useful...

Change Button at the bottom of the window



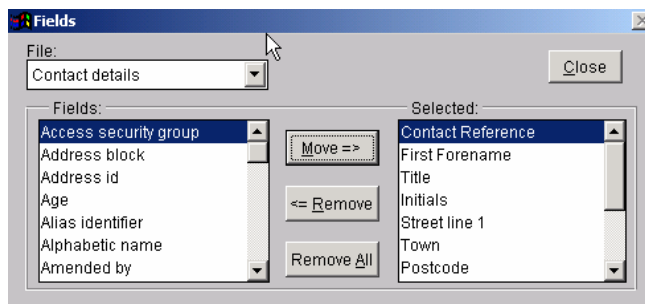
The two Buttons from this screen you are interested in are

Tables – to select the tables from which the columns of data can be found



And then

Fields – to select the columns of information



I would suggest that you set up your Browser/Selector with the same Tables and Fields as I have here.

Once they are selected, and Alms will ask you to confirm the selection, you can then move the columns around inside the Browser/Selector window and resize them by using drag and drop.

So after all that, why not select one of the Patel's from the list and have a look.

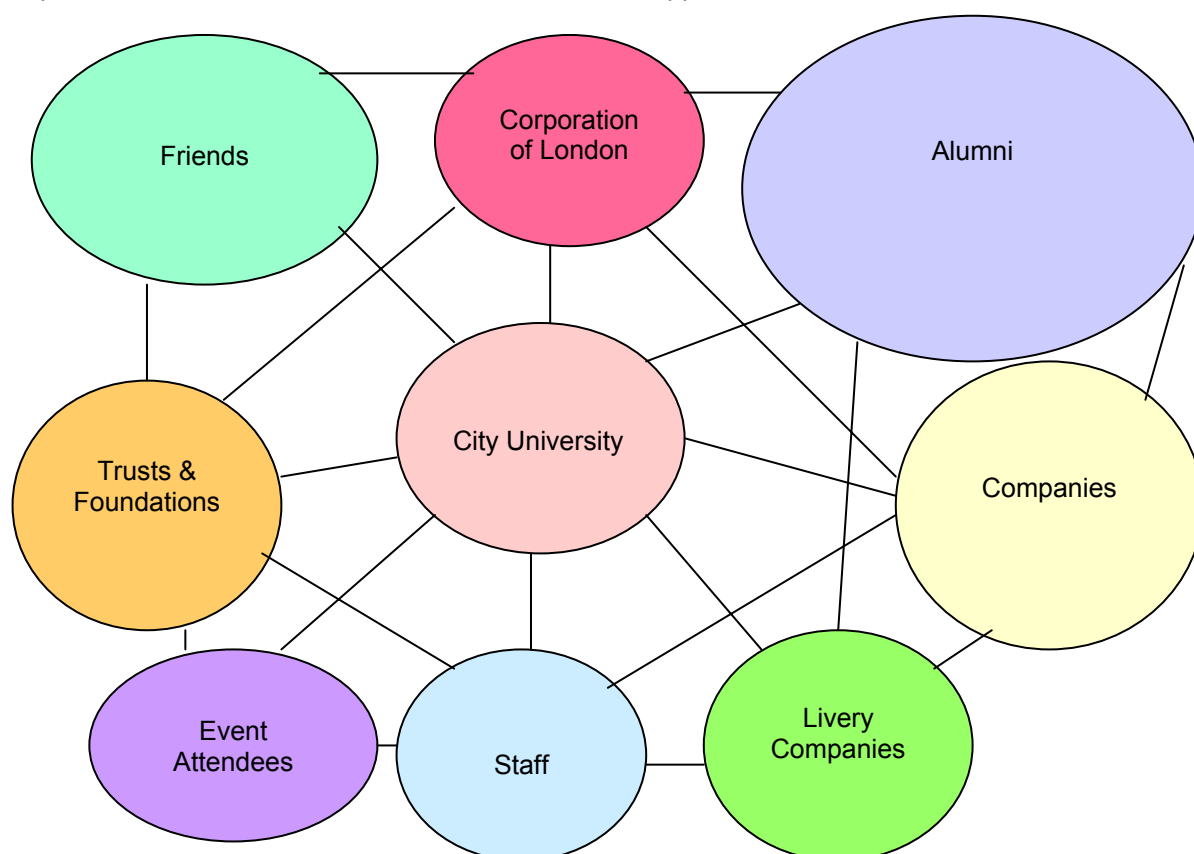
Before I take you around the record it's important to know the history and the context of Visual Alms, some legal and some cultural issues.

How it all began and the Big Picture

In 1998, Ian More Consultants were commissioned to undertake feasibility and scoping studies into the viability of Fundraising at the University. What very soon became clear was that the existing systems of holding information on the alumni and friends of the University, namely the MAC database and other Access databases in each of the departments would just not do the job. But it wasn't just fundraising that was affected by these systems. Mailings were more expensive than they had to be since the data couldn't go in one big file to the mailing houses. You couldn't really ask questions across Schools let alone the University. For instance "How many alums work at Merrill Lynch" – you would have to get each database administrator to run queries for this then find some way of combining the results which didn't count the same person twice since they had studied two departments (there are about 70 people for instance who have studied in the Business School and elsewhere in the University). Indeed keeping records fully up to date in all these separate systems was nearly impossible.

So, what to do? One of the Consultants then went round to find out from the users what City University wanted from a system. She pulled this list together into an Invitation To Tender document which specified what was required and invited suppliers to answer the needs and to give demonstrations of their wares. The users were invited along to judge the software packages and to award marks for each piece of the specification that the software met. And so from this process Visual Alms by Westwood Forster was chosen to be the new database for City University.

At City, Alms is central repository for information on external contacts. It has the Alumni, it has Friends of the University, it has some Former Staff and it has Companies. Alms tracks the relationships that we build with these contacts. In Alms we can see the mailings we send out and the responses which come back. We can track what has happened to each record.



Data Protection and Etiquette

Actually, let's do etiquette first.

How to Use Visual Alms

Visual Alms is the contact management system for City University – the University's address book in effect. In time it will hold details of all the University's stakeholders as outlined in the University Strategy. Currently it holds information on alumni, honorary graduates, businesses, friends and some staff of the University.

In any contact management system there needs to be an etiquette for how users treat the information which is at their disposal. You will now have access to all the alumni of the University, not just those of your own department, as well as the companies that they work with and also the friends of the University. In short, you now have access to everything. This is a positive move. For the first time we have one centralised database which should mean the end of contacts having to inform multiple departments of a change of address or a change of address making its way around multiple departments. The left hand can know that the right hand is doing. With the use of the Marketing Initiatives¹ module, we can even co-ordinate our efforts. This will mean an increased service to our Stakeholders.

The Etiquette

Respect all pre-existing relationships on the database

- Check for the department(s) where the constituent² may have studied (Course Dtls³)
- Check for an Attribute⁴ of " 'X' Dept Contact"
- Contact these departments before contacting the constituent – they may already have a relationship in place and in most instances will usually be happy for you to contact them. They may also have additional information still in manual files.
- In the event of dispute, arbitration will be provided in the first instance by the Director of Development. If this does not resolve the issue the matter will then be referred to the Academic Registrar who will make a binding decision.

This etiquette, as well as for individual constituents, should also be applied to marketing mailings. It is in addition to the normal criteria which would be applied to create a mailing.

¹ Marketing Initiatives is a module within Alms which allows you to define every aspect of your mailing or telephone campaign for management purposes. As well as defining the segments of the mailing you can enter all cost elements. This will allow you to generate management reports on the cost per item sent, profitability and the cost of the contact i.e. how much the various mailings to that particular contact have cost. It is through this module that each record is marked with the mailings etc it has received.

² Constituent is an American term, widely used in alumni and development work, to describe a contact on the database. A constituent can be a company as well as an individual.

³ Course Dtls is a button on the main viewing screen which brings up full details of Education History.

⁴ Attributes are flags on the database which define why someone is on the system. For instance Alumnus/a, Careers Network Volunteer etc

Data Protection Act 1998

To comply with the new 1998 Act there are three things that must be done:

- Maintain the Eight Data Protection Principles (ensures compliance with fair processing codes) (the Principles are different from the original eight of the 1984 Act)
- Uphold the rights of the data subjects (these rights are now explicitly identified, including the right to object to direct marketing)
- Ensure compliance with notification (data protection registration)

If you fail to comply with all three you are committing an offence. Each of the three underpins the others.

Under the new law, the simple act of holding information means that you will need to comply with data protection. If you hold, obtain, record, carry out any operation with information you must comply. Data must only be collected for predefined purposes and then may not be put to any other uses. At the point of collection of data there should be a statement of compliance with data protection and the purposes for which data is to be used. Phone campaigns should also use a data protection disclaimer.

Once gained, you will also need to regain permission to hold/process the information at regular intervals. You should never erase the information, instead suppress or block it as this will lead to fewer problems about re-acquiring contacts who have expressed the wish that you cease and desist from contacting them.

The scope of the Act is for personal data – about a living person who can be identified from the data. It is worth mentioning here that creating a coding system to “hide” the identity will not be considered as a reason for non-compliance.

The new legislation covers

- Computer based information – databases, spreadsheets, word processing etc
- Faxes
- Internet
- Manual data held in a relevant filing system (e.g. card index, folder, filing cabinet)(a non-relevant filing system would be to have a room where you throw your files in from the door and retrieve them by going through the pile of paper on the floor)

The act only applies to personal data. It is therefore OK to be writing to the secretary or other official of a company in their organisational capacity so long as it is the company and not the individual who is targeted. Of course this has not yet been proven through precedence.

The Eight Principles

1. **You must acquire the data Legally and Fairly**

Legally – with the consent of the subject (which isn't defined by the act but it will probably comprise the subjects freely given and informed decision to provide the data – opt in rather than opt-out)

Legally can also take the form of: an agreed contract (taking services through the organisation); to comply with the law (for instance the ancient Scottish Universities have a legal obligation to publish a list of all extant graduates); to protect the subjects vital interest (i.e. life or death); part of a criminal investigation; balanced legitimate interests of the data controller with the rights of the subject (in this instance you can rely on opt-out rather than opt-in, however it may be necessary to prove the balance).

2. Data can only be obtained for Specific and Lawful Purposes

The Data Controller when registering with the commission should opt for the broadest range of purposes possible.

3. Data should be Adequate, Directly relevant and Not Excessive

4. Data should be Accurate and Up-to-Date

5. Data should only be kept for the duration of the purpose for which it is held

If you are having a one-off lecture or event the data should only be kept until that purpose is finished. However if you maintain a VIP list or lists for invitations to the events/lectures of an organisation, providing you have consent this should be safe.

6. You may only hold data if you protect the rights of the subject in so doing

7. The data must be Secure

Applies to manual as well as computer based.

8. Data cannot be transferred outside the European Economic Area unless the recipient area has similar data protection.

Only Hong Kong and New Zealand comply with this. Transfers elsewhere are therefore problematic. It may be acceptable if a suitable contract was in place guaranteeing that the 1998 Act was upheld in all its aspects.

Sensitive Data

If you require to hold sensitive data, you will need the subject's express consent to do this. Even sending out a form which solicits sensitive data, for each piece you will require specific opt-in permission to hold it. However if the sensitive data has been made public by the subject you do not require opt-in permission but you will need to prove that the subject has freely and deliberately made it public.

Sensitive data includes:

- Race/ethnicity
- Political beliefs
- Religious beliefs
- Trade union memberships
- Physical/mental condition
- Sexuality
- Criminality

Sensitive data does NOT include such things as: age, sex, financial information.

However an exemption already exists for charities and voluntary organisations which otherwise would be unable to function due to the Act. Any *registered charity* which is already in active communication with the supporter/member, and where they uphold the supporters rights may continue. e.g. a religious charity by its very nature is holding the religious beliefs of those on its files.

In order to be legal and fair you must follow the Fair Processing Code by notifying the subject with

- the identity of the data controller
- the purpose for which you are holding data
- any other specifics about the data (e.g. use of the list by third parties)

For alumni/development work it is best to have a statement on student matriculation forms regarding the data protection and the legitimate uses of the information from first entry through the full lifetime of the records through registry and alumni systems.

Under the 1984 Act when you organisation Registered the Data Controller would specify which of the 76 purposes you would be using. Under the 1998 Act you now undergo Notification of which of the 26 purposes you are using.

The Data Controller is the one who determines How and Why data is processed and by processing we mean doing absolutely anything to the data. There are no loopholes here. If you are the person who determines the how and the why and you work for an organisation, it is the organisation which is deemed the Data Controller. However, if you are an independent consultant or fundraiser you will need to ensure that you are not identified as the Data Controller but a Data Processor instead. To achieve this you will require a written contract with your client which specifies what you are going to do with the data. The client also requires the protection of a contract otherwise they may be deemed to be making unsafe disclosure.

The subject has the right at any time upon written application and payment of fee within 28 days to receive a full transcript of all information held on the subject. (The fee should be only the cost involved if collected at all). The subject has the right not to feel distressed or pressured by the data being held. They have the right to have corrected or erased information that is wrong. They also have the right not to have the data held for direct marketing purposes. Direct marketing is the communication by whatever means of advertising directed at the individual (though this still requires some clarification from the Commissioner). The rights of access will be completely retrospective therefore all records should be brought up to data protection standards.

Personal data on the World Wide Web is automatically deemed to be transferred to everywhere around the world. The only way to publish personal data on the web is to have direct opt-in consent from the individuals concerned.

Prospect Research faces a big problem under the new act – the prospect will have to be informed that a record has been started on them as soon as practical and will have to give consent or at least have an opt-out to prevent a file forming on them. There may be a case if the prospect has already given consent to be in your records but here again there is no precedence.

If your organisation has a separate trust or limited company, transfer of data between both organisations will require that the subjects are advised of the transfer and a data protection disclaimer statement must be included for the new Data Controller.

The Telephone Preference Service is available for those who do not wish to receive unsolicited phone calls. Therefore it is vital to check with the TPS before you carry out a phone campaign to make sure that you will not be calling anyone who has registered with this service. There is a fine of £5000 per instance of someone registered with TPS who has been called. The Data Protection Commissioner is still considering the position of those who have given consent for you to contact them and then register with the TPS.

Key Dates:

Act comes into effect:	01 March 2000
Existing Records have to be compliant:	24 October 2001

Data Protection Statements at City

Short Statement

Data Protection: your details will be held in City University's Contacts Database and will be treated with confidentiality and sensitivity. The data is available to the faculties, academic and administrative departments and will be used solely in accordance with our Notification under the Data Protection Act 1998. Under the terms of the Act you have the right to object to the use of your data.

Alumni Questionnaires

1998 Data Protection Act

All data is securely held in the University's Contact Database and will be treated confidentially and with sensitivity for the benefit of City University and its members. The data is available to our faculties, academic and administrative departments, recognised alumni societies, sports and other clubs associated with the University, and to agents contracted by the University for particular alumni-related projects.

Data is used for a full range of alumni activities, including the sending of University publications, the promotion of benefits and services available to alumni, notification of alumni events and of programmes involving academic and administrative departments. Data may also be used in fund raising programmes which might include an element of direct marketing.

Under the terms of the 1998 Data Protection Act you have the right to object to the use of your data for any of the above purposes.

University's Main Data Protection Statement

The University is registered under current UK Data Protection law. It holds data in electronic and paper form on your personal details, academic and administrative history, on any relevant financial transactions and use of University facilities. Most of this information is necessary for us to properly administer your studies with the University, for example the recording and processing of assessment results, the determination of final award outcomes, and the production of management information statistics.

Your assessment data will be processed to determine your overall award outcome, and the precise way in which this is done is published in relevant handbooks and documentation. In due course, your records will form part of the student archive and your computer record will be available to the University's Alumni Relations staff for approved purposes.

In addition, the University is required by law to collect and provide information on every student to certain external agencies. These bodies include the Higher Education Statistics Agency, local education authorities and other grant-awarding bodies, the Student Loans Company taxation authorities. We are also obliged to release information to the Police and similar law officers as part of criminal investigations, and in some instances, to officers of the Court in relation to civil proceedings. In certain circumstances relating to the recovery of outstanding debt, data may be passed to debt collection agencies acting as agents for the University

The details of your academic award from the University are regarded as public information. Names of successful candidates will be published on open pass lists. This information will also be routinely released to a third party (for example, prospective employers). Other information which will be routinely released to a third party is whether or not you are a student here. Once you have signed up with Computing Services, your e-mail address will be published in a University directory (users may make themselves ex-directory for external access).

Any queries concerning Data Protection should be addressed to the University's Data Protection Officer.

On the Record

The screenshot shows a 'Main Viewer (Enquiry)' window for 'Mr Tomas de Tanqengin'. The interface is divided into several sections:

- Basic Biographical details (5):** Includes fields for City ID (1), Default Addressee (2), Organisation (3), and Deceased (4).
- Attributes (7):** A section for selecting attributes, currently showing 'DummyRecord'.
- Blocks (Deactivations) (8):** A section for selecting deactivation blocks, currently showing 'No Known Address'.
- Buttons for more detailed viewers:** Includes buttons for 'Name Etc', 'Deceas detls', 'Quals&Distls', and 'Course Dtls'.
- Careers Network Details (9):** A section for viewing career network details.
- Addresses:** Lists 'Home' and 'Work' addresses for 'Mr Tomas de Tanqengin'.
- Memberships:** Shows 'AA Cardholder' membership from 01/03/2000 to 31/03/2005.
- Tel, Fax, E-mail:** Lists contact information including Home Telephone (020 7505 5552), Mobile (0797754464301), Home Email (tomas@ledepotdetrai), and Work Fax (020 7505 5555).
- Home/Work Addresses Confirmed Dates (14):** Shows dates for 'Home Add Confirmed' and 'Work Add Confirmed' as 30/03/2000.
- Communication Numbers (13):** A section for listing communication numbers.
- Work Details (12):** A section for listing work details.
- Correspondents (10):** A section for listing correspondents.
- Home Address (11):** A section for listing home addresses.
- Additional Dates (15):** A section for listing additional dates.
- Associations and Memberships (17):** A section for listing associations and memberships.
- The Button Box (16):** Contains buttons for 'Links', 'Mail To Get', 'Notes', 'In / Out', 'Event/Lec', 'Opinion', and 'Sorbet'.

1 City ID Or CID, Reference Number, (Alumni Number)
This is the main index and fastest way of looking up an individual or company on Alms

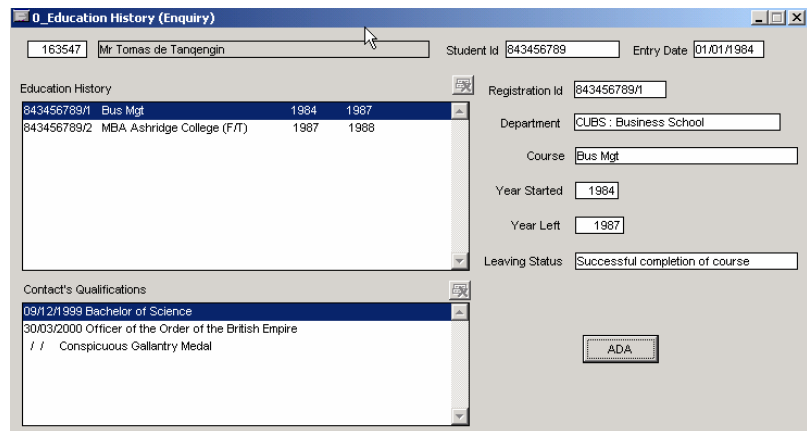
2 Default Addressee Or Addressee Line 1
This is the first line that would be displayed with an address on an envelope or mail merge letter. The usual format at City would be *Title Initials Surname*. However the system is sophisticated enough to deal with the more unusual titles and forms of address, for instance UK Peerage, Military and Ecclesiastical Forms, and if all else fails, you can set things manually.

3 Org? Organisation
A box which if ticked indicates that this record is for an organisation.

4 Deceased? A box which if ticked indicates that the individual to whom the record relates is dead. The system automatically excludes deceased constituents from mailings and label runs but it is usually best to make sure of this in your own queries. A button brings up further details of date of death, date of notification and source of notification.

5 Basic Biographical Details First name, middle names, Known As or nickname, Date of Birth and Age, Sex, Marital Status and Nationality.

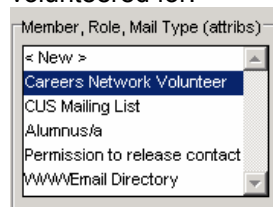
6 Brief Education Details A window onto the education details which shows Course, Year Admitted and Year Left. The button **Course Dtls** brings up a separate viewer which provides more detailed information including Leaving Status, Qualification and Student (Dolphin/SI) ID.



Qualification exists in a separate table from education therefore we can't link the qualification directly with course. This is done from inference based on dates.

7 Attributes

Attributes sometimes known as member, role, mail type or constituency are the reason(s) why someone or some company is on the database. The usual reason in the case of Alms is that an individual is an Alumnus/a and therefore a member of the CUS Mailing List. For companies, it is usually that they are Alumni employers. It is here that you would find other departments links to the record. The attributes will also show what someone has volunteered for.



8 Block/Deactivations

Why someone should not be contacted, for instance No Known Address, Contact Requested No Mail, Deactivated by University. We would never delete a record from the system to prevent mailing – the most likely thing that would happen is that we would re-acquire the record and of-course have no indication that the person should not be mailed.

AlumReqNoAAMail
 CN Deactivated by City
 Cntct Rqstd No Tel Solicit
 Contact Rqstd No City Business
 Contact Rqstd no CN Mail
 Contact Rqstd No Mail
 CUS Mail To Expired
 Deactivated by University
Home Gone Away
 Internal Gone Away
 Mailed via partner's record
 No financial requests
 No Known Address
 TermTime Gone Away
 Work Gone Away
 xDo not mail
 xGone away

This is the current list of blocks. Please note, wherever you find an “x” before an item in a list, this is because the item isn’t currently used in the system and should therefore be avoided.

9 Careers Net

Careers Network Details

If a person has an Attribute of Careers Network Volunteer, then there will be more details on the viewer brought up by this button. Here there details of what the person has volunteered for as well as how they should be contacted.

The lower part of the screen gives details about the students who have contacted them.

Please refer students and alumni to the Careers Development Centre and the Careers Management Service to use this facility.

10 Correspondents

Also known as Addresses

This is the really big difference of Alms over other databases. Alms recognises that people wear different hats – they have multiple roles in life. For instance, you have a home life as well as a work life, you may serve on committees or on the board of a company. Correspondents gives us a way of recognising this and of writing to you in each of these capacities. Each record has a Default

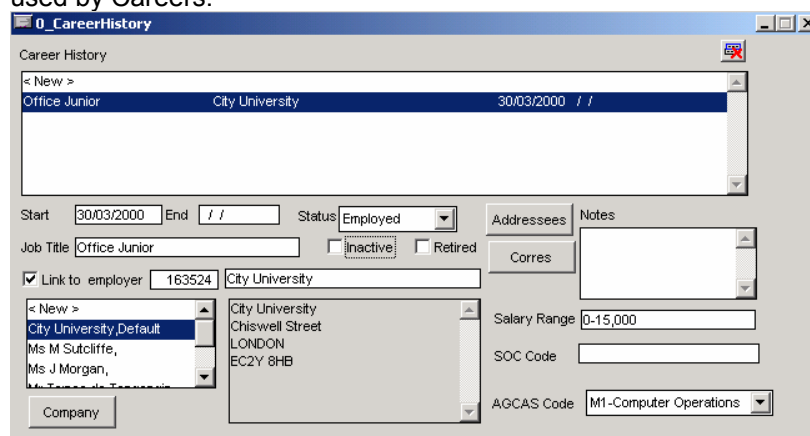
Correspondent – the place where mail normally goes. This can link to your Home Address or your Work Address or indeed any address you want. We can also have a separate Work Correspondent or Event Correspondent. Correspondents can use information from two separate records. In City's version of Alms, all the companies are stored as separate records to the individuals.

11 Home Address

The home, term-time or parental address for individuals or the company's address. May or may not be linked to the Default Correspondent. In Alms, we keep all the old addresses so that we don't replace new information with old.

12 Work Details

As well as current details we also keep the old details so that we build up quite a CV on the person. We also keep information on Employment Status, Salary and AGCAS Code - the coding system used by Careers.



13 Communication Numbers

Phone, Fax, email. These aren't linked to the addresses but exist as a separate table. This has implications later on when you want to query.

**14 Home Add Confirmed
Work Add Confirmed**

The dates when the home and work addresses were last confirmed. We use any form of communication which states these to confirm the data. For instance, if someone writes in about something, we can confirm their address from the letter.

15 Additional Dates

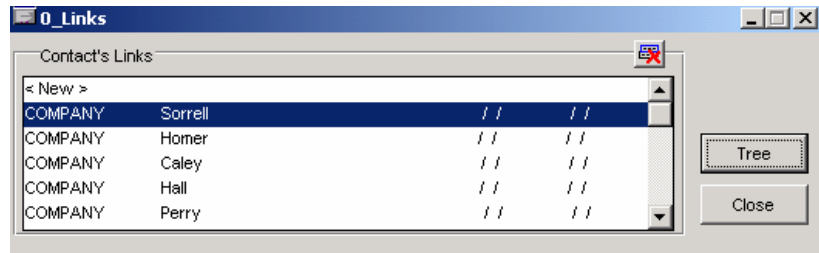
Where we hold things like - Work Address Confirmed Date, Honorary Degree Conferred Date etc

16 The Button Box

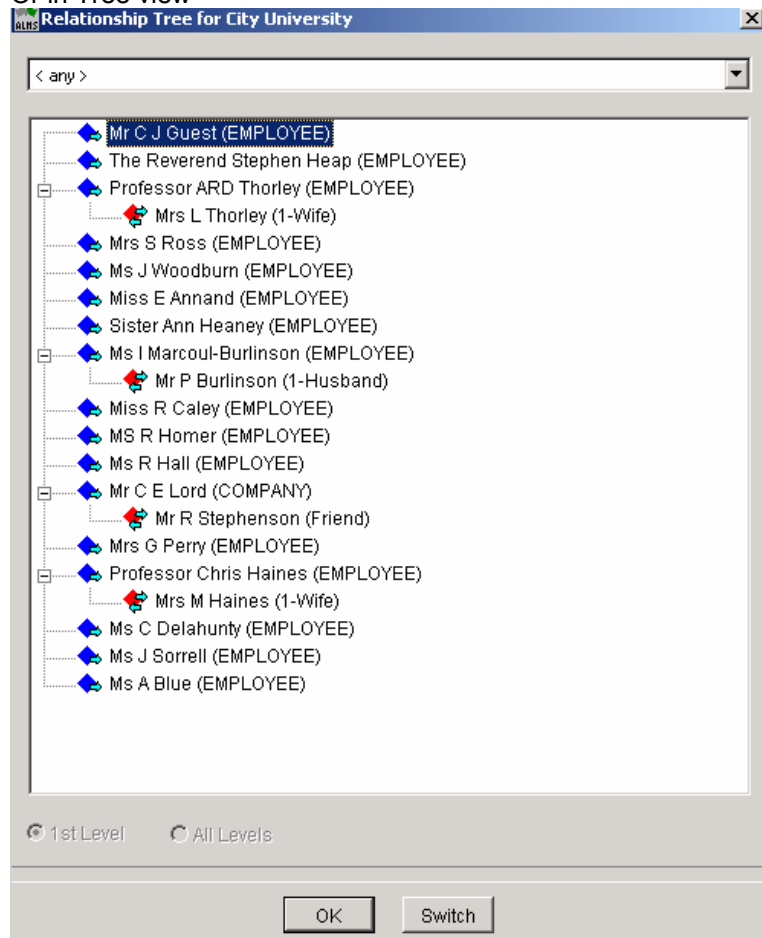
Currently hold buttons to bring up viewers for

Links

Shows the links to other records. For instance to the employer record, a husband or wife, a training placement manager.

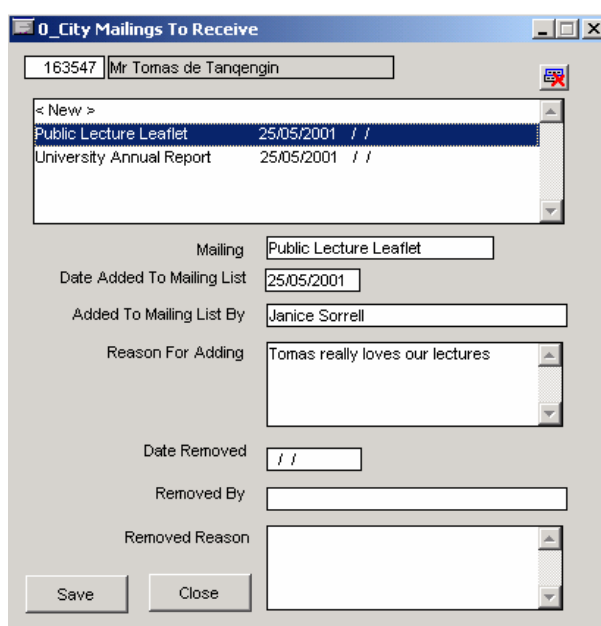


Or in Tree view



Mail To Get

This is for short range mailings or for mailings that would be very difficult to gather by normal queries. The Annual Report, Public Lectures, City Connect Network as well as Christmas Card lists are done here.



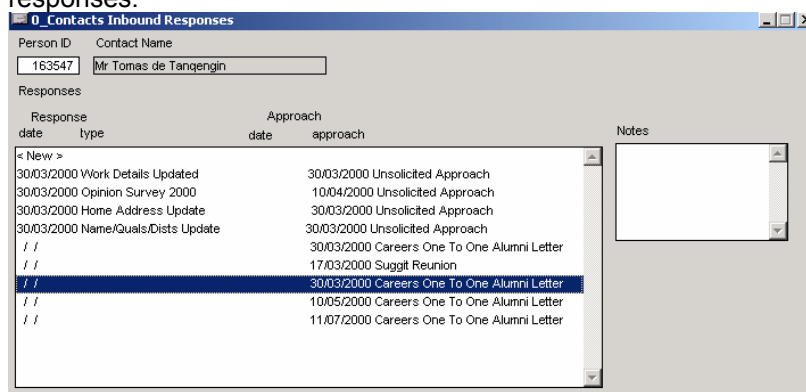
Notes

Every database has them. These are for information that can't fit into the normal run of fields or if it is best kept as straight text. Telephone calls or meetings with the individual or company can be kept here. But please bear in mind the Data Protection Act. The person has every right to see what we are keeping on them.

There is a field for Notepad Type, Date Added and Added by as well as the note field itself. When adding a note please put in the date and you name, then the note on the next line.

In/Out

The Approach and Response History. This is another major advantage of Alms over other systems. It tells us what has been sent out and what has happened to the record in response to this. The Module called *Marketing Initiatives* is what marks up the records with the Approaches, while *Inbound Contact Logging* (where we do our data entry) marks up the responses.



Event/Lec

Events and Lectures. Although Alms has an inbuilt *Event* Module this is very complicated

and ties in rather too heavily to the Financial side of the system where we log the gifts. So City has created it's own, much simpler system.

Opinion

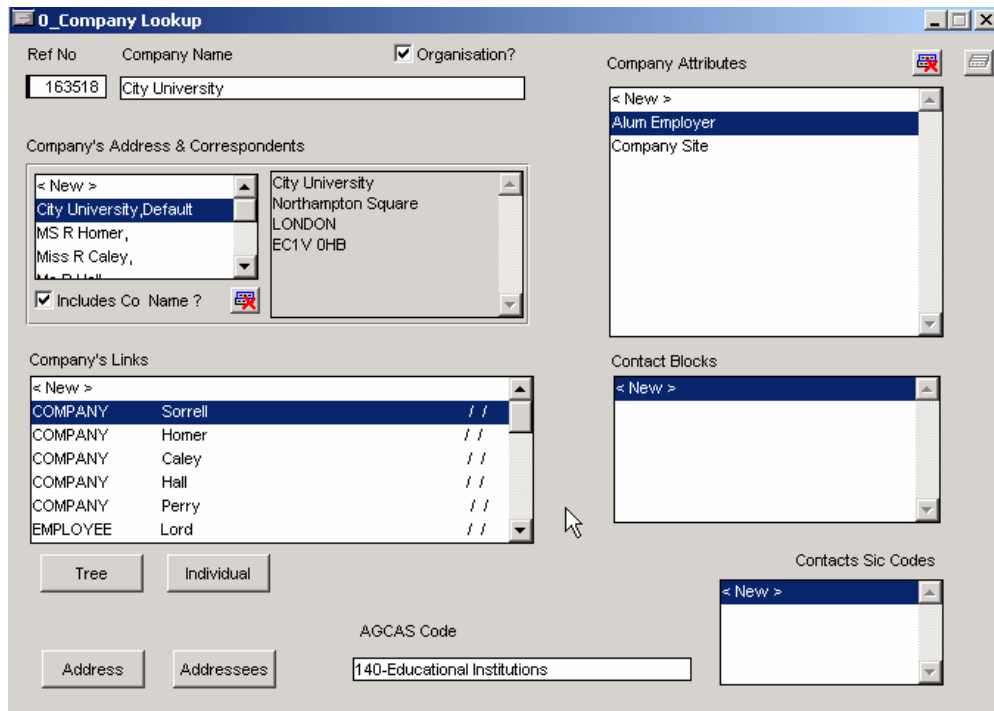
Opinion Survey 2000

The March 2000 edition of CityNetwork went out with an update and Opinion Survey Form. Alums were asked to rate from 1 to 10 (1 being first priority) a number of subjects which they thought we should be providing for alumni.

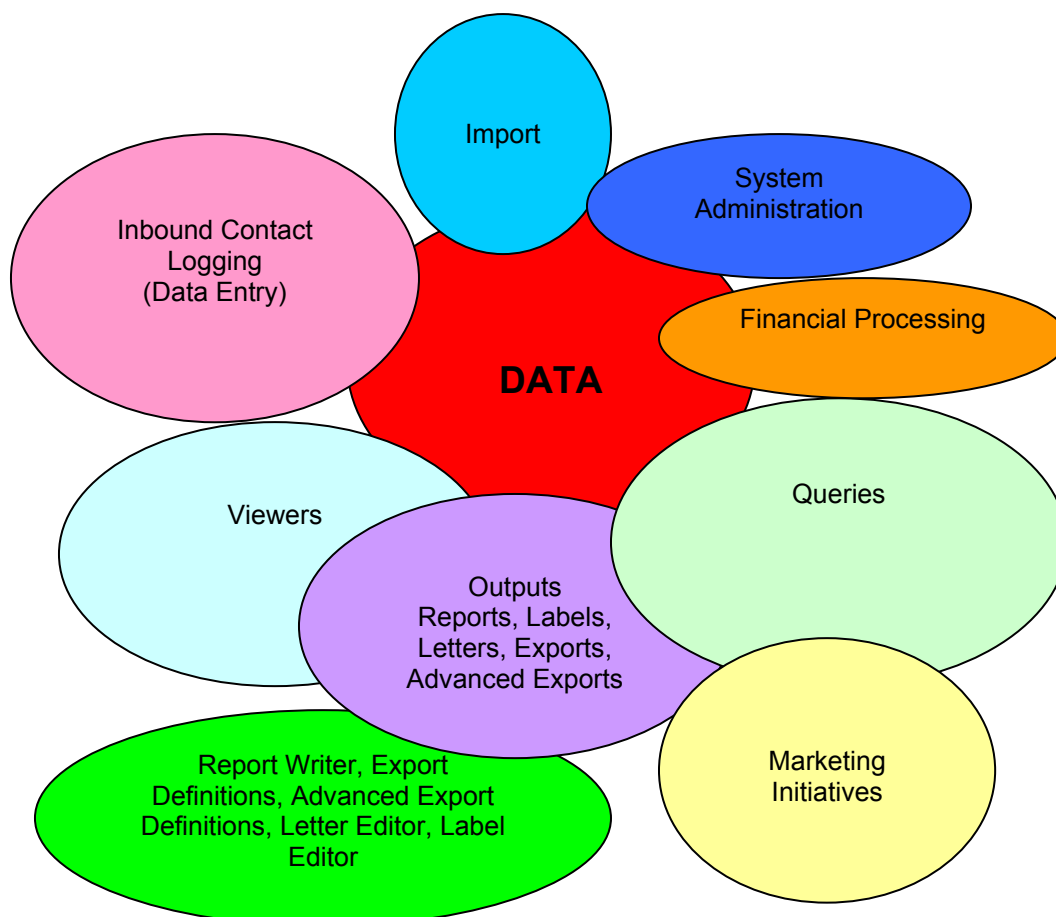
17 Associations / Memberships

Shows membership of various university and alumni committees as well as Alumni Association Cardholders.

For companies, the following viewer makes more sense.



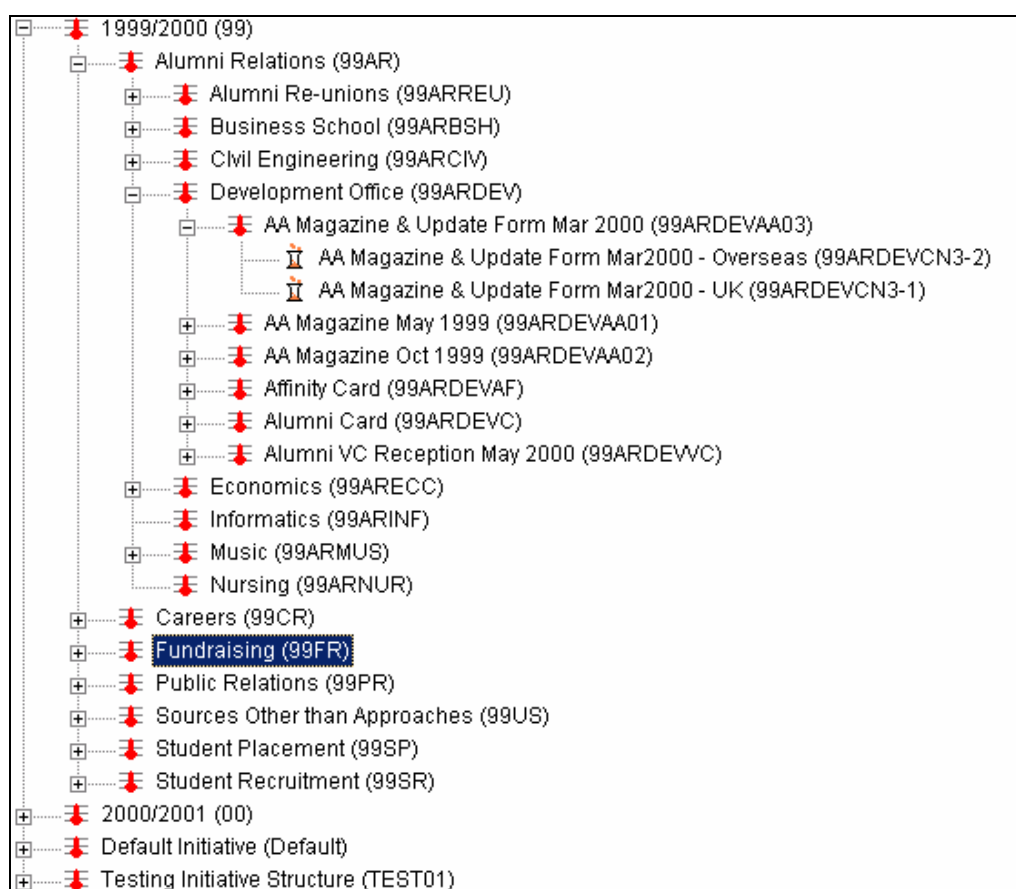
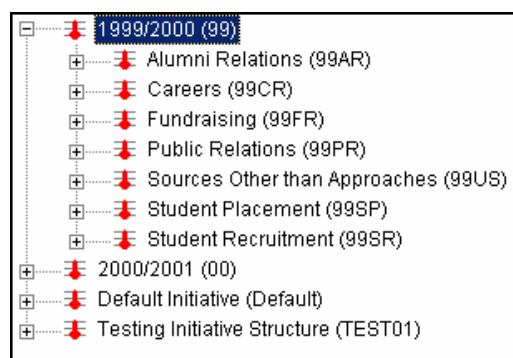
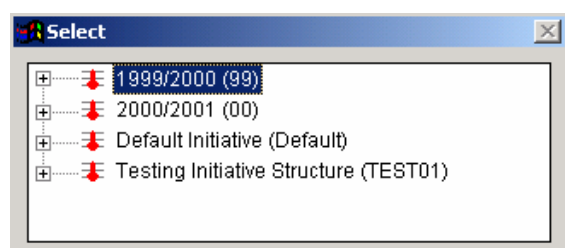
System Overview



So far, we've seen **viewers** onto the data and for the purposes of looking up information this is fine. From the 0_Main Viewer you can even use information by using the **Output Toolkit** to print off a label or a letter. By using the **List** you can even collect several records together to produce these. (To do this go into each record, access **List**, then **Add** the record. Use the Output Toolkit to produce the desired result).

To really start manipulating data, you need the **Query Module**. This is a subject of a further course. A very great strength of Alms is that you can query on every field in the database. Like Access databases you do need to know a bit about how the database is set up – it's structure or schema. You will also need to remember that in Alms you can only query up-to one table away. **Reports**, like the rest of the **Output Toolkit** are something which would take a course in its own right to explain fully. We have prepared series of reports and outputs for you to use. If you require something special please talk this over with the Information Systems Team in the Development Office. If the use of the words "report" and "query" seem a bit strange it's just that we have to think about these things in quite a clear fashion. A report is something that appears on paper – it specifies which fields you want to see and any special filters. Queries defines who you want to see. A query gathers the data for the report to display.

Marketing Initiatives is a module which allows us to see the activities across the University and also marks up each record with the activities they are included in. Marketing Initiatives forms a tree like structure. At the top level is the academic year. This then branches out to the main types of activities – Alumni Relations, Fundraising, Public Relations, Careers etc. Each of these then branches to the schools and the departments. Under the department we have individual Initiatives and in these we have the *Approaches*. An approach is a query with a form of Output.



Data Entry in Alms is done through another module – **Inbound Contact Logging**. Since City has many people performing data entry it is very useful to know what information has changed on a record. Indeed this a quite an advantage over other systems. It also gives a good indication of how “warm” an alum is to the University by the number *Responses* that appear on the In/Out (Approach/Response History). In Inbound Contact Logging you think about what information you are about to change on a record then pull up a *process* that will allow you to do this. You also have to specify which *Approach* this information is being amended/appended in *Response* to. Again, this is the subject of several courses.

Import is the method by which we take in information from the Registry system know as Student Information, SI or Dolphin. The data file from SI is first tidies to put fields into the correct order then the import module is run. Import can only take place when the system is locked to all except the administrator. Hence when Importing, or performing other **System Administration** tasks, the system will be unavailable.

The final module I want you to be aware of is **Financial Processing**. Although you need never see or be bothered by this it is of interest to know that Alms is used to track donations to the University. The only indicator you would be likely to meet is an Attribute or Donor or Donor-Anonymous on the record.

Something to play with

When you were contacted to come on this course, you should have been asked for which department/courses you work with. This was in order for us to produce some reports for you on the alumni you deal with. There should be two reports for you:

- 1) Simple Education Details
This will have been produced as the full list we have on Alms for your courses
- 2) Contact Profile Report or Simple Contact List
Which one we have produced depends on the number of alums you have but in either event here we display only the Active alums – i.e. that are on the CUS Mailing List and that are not CUS Mailto Expired, Deceased, Deactivated (whether by own request or University) or have No Known Address.

When you go back to your department can you please check that we have all your alums and that we have the correct addresses/information for them. Please bear in mind that you can check how current the information is on Alms.

Reading Some Records

You will now be asked to tell me about some of the following records:

28662, 40303, 33933, 41716, 53391
Michael O'Hehir, Michael Thornton, Prof Gerald VInten

Log Out

You should always aim to log out of Alms in a controlled manner. This will ensure that, should you be the last one logged in, the database files are all neatly packed away so that the system will be faster next time anyone logs in.

To log out you need to be at the desktop. You then simply punch the Exit button on the Button Bar at the bottom of the Window.



Exit

In Conclusion

We have seen how to

- log in to the database
- set up the desktop
- customise the browsers
- read records
- use the Output Toolkit and List commands, and
- log out

We've heard about

- why Alms was chosen for City
- how we should use the information in the system
- the implications of the Data Protection Act
- the wider Alms system

And we are going away to

- check all of our alumni are up to date on Alms
- practice reading more records

Further Visual Alms Courses

Service Level Agreement 2

Introduction to Alms

(Reading the Record, Data Protection, Overview, House keeping)

Queries

(Set up User Dept Building Block, Perspectives, Practice)

Marketing Initiatives

(Initiative Structure, Activity, Department, Approaches)

Service Level Agreement 3

Data Entry One

(Goneaways, Correspondent Swap, Home Updates, Work Updates)

Data Entry Two

(to be defined)

Data Entry Three

(to be defined)

Service Level Agreements 2 and 3

Practice Sessions

(users can come to Training Suite, have help on hand)

Refresher Courses

(users can have any of the courses repeated)