DATA ON DEMAND: LISTS AND REPORTS – QUICK GUIDE

The reports and lists function of TigerNet has always allowed regional association officers to quickly and easily download contact information for all Princeton constituents in their region for tracking purposes or to generate labels for mailings. With the upgraded suite of services provided by the new TigerNet, volunteers will be able to see additional information (including "last-updated" dates) and build customized lists on demand.

A complete usage manual is available for all volunteers. To start using the essential elements of the system, ***please review and follow the steps below:***

- Go to the TigerNet Administration Tool web site at: **https://admin.alumniconnections.com/olc/admin/PRU/admintool/**
- You will be prompted to log in using your regional association user-ID and password. Your user-ID has been restricted to access only the records of constituents with preferred addresses in your PAA region.
- The screen will refresh with the Administration Tool landing page. Click "Data on Demand" under the "Community Reports" heading on the left navigation bar.

SEVEN FREQUENTLY USED RECIPIENT LISTS are pre-loaded in the system:

- **Standard Regional Pull** – includes all alumni, parents of current students, and widows in your region
- **Standard Regional Pull – Without E-mail Addresses** – same criteria as above, but only those who do not have an e-mail address in the system
- **Regional – All Alumni** – includes all undergraduate and graduate alumni in your region
- **Regional Parents** – only parents of current students
- **Regional Undergraduate Alumni** – only undergraduate alumni
- **Regional Graduate Alumni** – only graduate alumni
- **Regional – Women** – only female undergraduate and graduate alumnae

A "**STANDARD REPORT CONTENT**" template has also been pre-loaded in the system. "Report Content" refers to the data fields included on a report (a.k.a. the column headings on a spreadsheet). The standard report yields:

- **Name** – separated into first and last name columns
- **Preferred Name** – full name and class year information is compiled (creating a useful single field for addressing mailings or creating labels)
- **Primary Constituency** – identifying each record as A (undergraduate alumnus/na), G (graduate alumnus/na), P (parent), GP (graduate parent), GW (graduate widow/er), or W (undergraduate widow/er)
- **Class Year**
- **Gender**
- **Residence and Business Address Information**
- **Preferred Address Indicators** – "Y(es)" and "N(o)" indicate which address is preferred for contact
- **Business Name and Position/Title**
- **Telephone Numbers –** preferred home and business numbers
- **Preferred Email Address**

To **RUN A REPORT** (including one of the pre-loaded lists with standard report headings):

1. Click on the "Run Reports" tab at top of page, and select the desired report from the dropdown menu.
2. Choose "Download Report" (which will pull a delimited text file) or "Display Report" (which will pull up the list on screen). Do NOT use the "e-mail report" button (to understand why, see the FAQ).
3. NOTE – Downloaded reports are generated as delimited text files, which can be opened and/or saved on your hard drive, then cut-and-pasted or imported into a spreadsheet program (such as Excel) for further sorting and manipulation into reports, lists or mailing labels.

OTHER OPTIONS:

A. To create a **new list/query**:
1. Click on the "Define Report Queries" tab at top of page, then select "Create a report list."
2. Use Standard Query Builder tab to create simple lists (e.g., "alumni from my PAA who graduated between 2000 and 2009"); use Advanced Query Builder to create lists based on more complex criteria (e.g., "from my PAA, female alumnae and female parents of current students"). Please refer to Data on Demand manual for detailed information about search criteria options.
3. Name your list (for tips in creating a naming convention, see the FAQ.)
4. Save your list. The page will refresh and your list will appear at the top of the returned page.
5. Click "Calculate" to determine the number of records in your list.
6. Click on "Display" to show the first few records in your list.
7. Go Step C (below) to assemble this new query/list into a report.

B. To create **new report headings** (in other words, start from scratch in selecting what fields you want to pull for each person/record):
1. Click on the "Define Report Content" tab at top of page, then select "Create a field list."
2. Name your list in the "Field list name" space (for tips in creating a naming convention, see the FAQ.)
3. Use either the "Classic selection" tab or "Drag and Drop selection" tab to create the new list.
   a. Highlight the required fields then click on "Add to field list."
   b. Reordering of fields can be accomplished using Move Up and Move Down button.
4. Click "Save this field list."
5. Go Step C (below) to use these report headings in a report.

C. To assemble a **new report using a new Report List and/or new Report Content:**
1. Click on the "Assemble Reports" tab at top of page, then select "Define a Report" to associate a mailing list with report content.
2. Name your "Report Definition" in the space provided (for tips in creating a naming convention, see the FAQ.)
3. Select an "Output format" of either comma-delimited or tab-delimited (see FAQ for more on delimited files).
4. Highlight/select a report list (mailing list) from those listed.
5. Highlight/select a field list (report headings) from those listed.
6. Click "Save the report definition."
7. Follow the steps in Section A to run this new report for screen viewing or downloading.

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USAGE POLICY – All personal information of alumni and affiliates is confidential and may be used ONLY for official University business. Therefore, this e-mail marketing tool may be used ONLY for official club communications and business. It is your responsibility to protect the data against unauthorized use. In addition, there shall be no transfer of the data to a third party without permission of the Office of the Alumni Association.

FREQUENTLY ASKED QUESTIONS

Q: What name and password should I use to log in?

A: Each region has been assigned a user-ID and password. Any of your officers who use broadcast e-mail will utilize this same user-ID and password. Do NOT use your personal TigerNet account NetID and password; the system is no longer calibrated to match individual alumni to their regions.

Q: I have been trying to log in to the account and now I am locked out. What happened?

A: For security purposes, three failed attempts to log in will lock your account for up to two hours. Please be very careful when typing in your log-in and password.

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Q: Can I change my user-ID and/or password?

A: The regional user-ID has been preset and cannot be changed. The password may be changed, however, any changes you make MUST be communicated to your fellow regional officers (who will need to use the same password when they access the system), as well as your Regional Affairs staff liaison at the Office of the Alumni Association.

Q: Who is included in reports/lists?

A: The controls are pre-set to give regional volunteers access to pull information on constituents with preferred addresses within the regional boundaries. You may not access information on constituents in other regions. Deceased constituents are automatically removed from your lists.

Q: What does the "e-mail report" button do and why should I not use it?

A: In the "Run Reports" tab, if you select the "e-mail report" button, the report you have pulled will be generated and e-mailed to the Regional Affairs staff because your user-ID is not connected to your personal e-mail account.

Q: How can I get a list of current students who are from my region?

A: This information is not available through this platform. If you require such a list, please contact your Regional Affairs staff liaison.

Q: How would you suggest I create a naming convention for reports?

A: Because the reports can be reloaded and used in the future—and because all officers within a region will be able to see and utilize work of their fellow regional volunteers—it is best to follow a clear naming convention for reports (as well as recipient lists and message content). It is important to be clear and specific about what information has been pulled; for instance, "undergraduate alumni 2000-2009" is much clearer than "young alumni" when describing a list. In a region where multiple people access this site, it may also be useful to add your initials to a name, so it is very clear who created the specialized list, report or e-mail.

Q: What does it mean that a report is "delimited"?

A: When you generate and download a report from this system, it creates a "delimited" text file. This is a raw data file, so when you open this, it may not look very pretty or manageable. However, it actually has been coded to easily translate into spreadsheet programs (such as Excel) through inserted tabs or commas, depending on which you select when designing a report. The pre-loaded reports have been set to tab-delimited, which will usually default to standard columns in a spreadsheet. For more assistance with importing this data into spreadsheet programs, please use the "help" features within those programs.

Q: What is the difference between tab-delimited and comma-delimited? Which is better?

A: We recommend using the tab-delimited download because you usually can simply cut and paste all of the text file data into a blank Excel spreadsheet. Either delimitation will also translate using the import function.

Q: I want to generate a set of mailing labels. How can this system help me do that?

A: The system cannot automatically generate mailing labels. However, once you have downloaded a report from the system and imported the information into a spreadsheet program (such as Excel), it is possible to utilize the mail merge function to create mailing labels. For assistance with mail merge, please utilize the "help" feature within your spreadsheet program, which will provide step-by-step instructions.

Q: Is there a time limit to my session?

A: No – your session will not time out.

Q: I'm still confused – my question is not answered here. Where can I find more information?

A: For more detailed information on all aspects of creating reports and lists of your constituents, please refer to the Data on Demand manual or contact your Regional Affairs staff liaison at the Office of the Alumni Association.