TRAINING MANUAL ON UNPAN CONTACT DATABASE

- Any web visitor can search and browse the contact directory database.
- UNPAN members can search, add, and run reports on contacts in the database.
- Users in UNPAN can even mail merge selected contacts into Excel for further processing.
- Create a report on the contacts in whom you are interested
- Each new contact added needs to go through an approval workflow before it goes public.

From Home Page

1. Click **Directories.**
2. Click Contact Directory of Public Administration.
3. Click Log in.
4. Enter user name.
5. Enter password.

> You are at the **Worldwide Directories** page where, at the top, you'll find the function buttons ('Search Contacts', 'New Contacts', etc) which allow you to use the database.

Search and/or Edit Contact Information

1. Click **Search Contacts.**

> From this page you can find contacts by putting in the least or most amount of information possible, depending on how narrow or how broad you want your search to be (by first name, region, institution, organization, etc.).

2. Fill in the text or use drop-down menu.
3. Click the search button at the bottom of the page to find result(s).
4. Click on any name to view more information on that specific contact or to update the contact information.
5. Click the edit button at the bottom of the page to make changes.

6. Make changes.
7. Click **Submit.**

> **Note:** The UNPAN Manager must approve all entries (new, edited, etc) before they appear in the system.

New Contact

1. Click **New Contact.**
2. Complete **New Contact Information form Step 1.**
3. Click **Next**
4. Complete **Step 2.**

   (Note that once you are in the Step 2 window you cannot return to Step 1. After you have completed both steps, you can then revise your entry from the initial/main page where all entries are stored before being approved by the manager)
5. Fill in the form.

> In the "**Specialize area**" and "**Language**" fields, you may select more than one specialization by together pressing the "control" key and clicking your mouse on the choice. If the specialized area/language is not on the list, you may type it in the "**Other**" field.

6. Click submit.
7. Click **here** (the link) at the top of the page to create another new contact.
8. Click **Log out** when you have finished working with the database.

> **If you do not log out, the will automatically log you our after a few minutes. You'll have to log in again.**

Mail Merge Workflow

1. Click Mail Merge
2. Enter search criteria to search the contact(s) you want to use:

   (eg. **Organization type**: NGO; **Region**: Africa; **Sort by**: First name).
3. Click the search button at the bottom of the page.
4. Click the square next to first name if you want to select **some** contacts from the list.
5. Click **Select All** (at the bottom of the page) if you want to communicate with **all** contacts on the list.
6. Click **Mail Merged As Excel**.
7. Select the field(s) you wish to use: (dear type, first name, last name, address 1, city, country, fax number).
8. Click **Continue** to open detailed information.

   (The list will appear in Excel as a web page. You cannot work with it.)
9. Save the result/document to your Excel file.

To save

1. Click **File**.
2. Click **Save as.**
3. Choose location (C-drive, desktop, etc.).
4. At "Save a type" select Microsoft Excel Workbook.xls.
5. Name the file.
6. Click **Save.**

You can use your mail merge list to prepare circular letters, envelopes, labels, etc.

7. Open **Microsoft Word.**
8. Create your letter.
9. Click **Tools.**
10. Click **Mail Merge.**

At Mail Merge helper window, Step 1

11. Click **Create.**
12. Choose an option – form letter, labels or envelopes.
13. Click **Active Window** (if letter, etc already prepared).
14. Click **Get Data.**
15. Click **Open Data Source.**
16. Get mail merge list/data source from the location where you saved it.

> If you do not remember where you saved the document but you do remember the name, go to "**Files of type**" at the bottom of the window and select "All files".

17. Open the file.
18. Click notify (if the file had been left open and a dialogue box appears).
19. Click **okay.**
20. Click **Edit Main document**.
21. Put in your merge fields (the merge fields button appears on the fourth bar on the left side).
22. Enter the merge fields where necessary.
23. Click the **Merge button** on the bar.
24. Click **Merge** again.
25. **Save the document** (as Mail Merge would have created a new one).

<u>**Create Report**</u>

1. Click **Create Report.**

> Once you have learned how to do the mail merge, creating a report is simple. You can view and process the report in Excel.

2. Choose the contact properties/data you want to show up in your report.
3. Place them in appropriate order (e.g. Dear type, first name, last name, etc.).
4. Click **Continue.**
5. Choose the criteria that will give you the contacts you want to see in the report (for example, if you want all the people whose first names are John and who speak French, type “John” next to First Name, choose “M” for Gender, chose “French” from the language drop-down menu; chose one item from the “Sort by” menu; then chose another item from the “Second Sort by” menu).
6. Click **Generate Report.**
7. Click **Save Report.**
8. You can save the report as an Excel spreadsheet.