IMPORTANT NOTE: 3/6/2015 - This Business Process does not reflect changes to the UM Reports. The process will be updated after implementation of the 9.2 upgrade.

General Statement

Developing and producing campus address mailing lists for units unable to do their own has been a longstanding function of Central Human Resources at the University of Minnesota. Initially, OHR charged departments for this work. However, after the implementation of PeopleSoft, charges to departments were discontinued and at the same time the number of requests for campus addresses and email lists to OHR Central increased. In order to relieve the burden on Central OHR for mailing lists, Central OHR is making available the UM Report “Custom Campus Mailing and E-mail Lists” which departments can use to independently produce customized campus address and e-mail lists. The end result of this process is “mail ready” Excel files for final processing by University Addressing & Mailing or mass e-mail dissemination.

Past requests to Central have been primarily from Twin Cities units for Twin City employees, but occasionally OHR has been asked for addresses for coordinate campus staff. While this business process is written primarily to assist TC units in creating their own mailing lists it is certainly a viable tool for coordinate campuses. Coordinate campuses should disregard such statements or labels such as "Duluth (U.S. Mail Bundled Rate Postage)" or other TC specific wording when drawing their own campus addresses.

NOTE: Due to the fluidity and/or temporary nature of many student (2xxx) and Grad/Professional Assistant (95xx) jobs, Central OHR does not require campus addresses to be maintained on these individuals. Although this tool will allow units to pull addresses on these groups, it is not advisable for the reason described.

NOTE: Poorly maintained and missing campus addresses are a continuous concern when pulling addresses for mailings. For this reason units are expected to review and clean all excel files before sending them to Addressing and Mailing. Units that fail to clean excel files before submission, and the result is more than 10 minutes additional work for Addressing and Mailing, will incur additional charges for the mailing. Please read the section on Addressing and Mailing Processing pages 25-29 to avoid these additional fees.

By using the UM Reports Campus Mailing tool, units accept the responsibility to:

- Adhere to University guidelines regarding mass communications
  - [http://www1.umn.edu/twincities/faculty-staff/toolkit/index.htm](http://www1.umn.edu/twincities/faculty-staff/toolkit/index.htm)
  - [http://webdepot.umn.edu/email_standards.php](http://webdepot.umn.edu/email_standards.php)

- Submit campus address mailing processing files to Addressing & Mailing in a mail-ready format
  - [http://www.a-m.umn.edu/CM/campcode.htm](http://www.a-m.umn.edu/CM/campcode.htm)
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Choosing a Custom or Standard Option

Before creating a custom campus address mailing list, it is recommended that departments first review the standard lists available to them. It is possible that one of the standard lists will appropriately target the intended audience.

Campus Address Lists

- **Custom Campus Mailing** is a customized campus address mailing list to meet department communication needs.
- **TC Faculty & Staff Campus Mail Addresses** is a standard list of campus addresses designed to reach all active faculty and staff on the Twin Cities campus.
- **TC Administrative E-mail List Campus Mail Addresses** is a standard list of campus addresses that targets the same population as the Administrative E-mail List (previously known as the DDD list) only in campus address format.

Campus E-mail Lists

Use of the Custom E-mail List described in this process requires prior approval from University Relations. [http://www1.umn.edu/urelate/index.html](http://www1.umn.edu/urelate/index.html)

University Relations also has several different standard e-mail list options to choose from that may be more suitable to a department’s needs:

- **Administrative E-mail List (AEL)** is a standard e-mail list comprised of all University administrators, deans, directors and department heads (previously known as the DDD list). The list has different sending options depending on the needs of the department.
- **VIP E-mail** goes out to all (or a subset of) students, faculty, staff, campus or system wide.
- **Lyris** is an option for those departments who send e-mails on a more regular basis to the University community.

For access to these lists, go to the University Relations Internal Mass E-mail Resources: [http://www1.umn.edu/twincities/faculty-staff/toolkit/UR_ARTICLE_144350.html](http://www1.umn.edu/twincities/faculty-staff/toolkit/UR_ARTICLE_144350.html)
HRMS Business Process: Custom Campus Mailings & Email Lists

UM Reports

To access UM Reports, go to: https://www.umreports.umn.edu/

Log in using X.500 and password.

Click on "HR Reports" and then "Custom Campus Mailing and Email List".
Click on “Custom Campus Mailing and Email List”. (Check the “Include on my Home Page” box to have the report automatically appear under the HR Reports link.)

The first prompt page shows the default settings are “Select Campus Mailing” and “Select Custom Campus Mailing”. In addition to the custom campus mailing option, there are two standard campus address mailing options to choose from:

- TC Faculty & Staff Campus Mail Addresses – designed to reach all active faculty and staff on the Twin Cities campus.

- TC Administrative E-mail List Campus Mail – designed to reach University administrators, deans, directors and department heads on the Twin Cities campus (previously referred to as the DDD List).

For directions on using either of these standard campus mail address lists, go to page 14.

(Note: For quick reference, there is a link on this page to this business process located on the HRMS website.)
Custom Campus Mail Lists

For the purposes of this business process, the example used in all of the following screen shots to create a customized campus address mailing list will be all faculty (67-100% time) on the St.Paul, East Bank, West Bank excluding appointment term codes in '0', 'S', 'Y', 'Z'.

Leave at default settings “Select Campus Mailing” and “Select Custom Campus Mailing”.

Click “Submit”.

Choose one or more Employee Status(es). (To choose more than one, use the “Ctrl” button on the keyboard then click on the required options.)

Click “Submit”.

IMPORTANT NOTE: At the top of each prompt page, the selections which have been made along the way will appear and build a “prompt path”. Users are able to click back through the prompt path if they want to change their choices.
Choose one or more Location(s) where the campus mail will be sent. Click “Submit”.

Choosing a College is optional. If a selection is made, it will limit the data to only college(s) that have been chosen. If a selection is NOT made or skipping this prompt entirely is the same as selecting all colleges. (The “Select All” link at the top of the list will automatically select all of the colleges.)

Choose one or more College(s).

Click “Submit”.
The default is “Select Percent Time Range”. If that is the preferred option, choose from the standard appointment percentages available in the dropdown.

**OR**

Click “Enter Percent Time Range” and type in a percent time start and percent time finish (screen shot below).

Choose the desired Percent Time Range from the two options above.

Click “Submit”.
Employee Groups

Selections from any employee group is optional. However, different conditions exist depending upon the choice(s):

- If no choice is made in any of the employee groups or altogether skipping these four prompts, all employee groups will automatically be chosen.
- If a choice is made from only one employee group, that choice will exclude all other employee groups.
- If a selection(s) is made from more than one employee group then only those selections from those employee groups will be included in the final results.

Prompt Selection for Custom Campus Mailing and Email List Report

Select one or more Faculty Group(s) below:

This is optional, a selection is not required.
Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...

- All Faculty
- Tenured
- Tenure Track
- Non-Tenured/Tenure Track
- Contract, Contract/Med Sch
- Temporary
- Visiting
- Adjunct, Clinical

Choosing one or more Faculty group(s) is optional. (See conditions above.)

Select one or more Professional/Administrative group(s) below:

This is optional, a selection is not required.
Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...

- Academic Administrative
- Academic Administrative (Managerial)
- Academic Professional
- Academic Professional (Managerial)
- Academic Professional (Non-teaching)
- Academic Professional (Teaching)

Choosing one or more Professional/Administrative group(s) is optional. (See conditions above.)
HRMS Business Process: Custom Campus Mailings & Email Lists

Select one or more Student Employee group(s) below:

This is optional, a selection is not required.
Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...

Graduate Administrative Assistants
Graduate Research Assistants
Graduate Teaching Assistants
Non-Employee Academic
Professionals in Training
Undergraduate Academic
Undergraduate Non-Academic

Choosing one or more Student Employee group(s) is optional. (See conditions above.)

Choose one or more Non-Academic Staff group(s) below:

This is optional, a selection is not required.
Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...

Civil Service (Non-Union Represented)
Clerical and Office
Confidential
Crafts and Trades
Health Care Non-Prof and Svc
Law Enforcement
Managerial
Non-Instructional Professional
Nursing Professional
Supervisory
Svc Maint and Labor
Technical
Union Represented

Choosing one or more Non-Academic Staff group(s) is optional. (See conditions above.)

Click “Submit”.

(Note: The previous four screen shots appear on one prompt page when building the customized report. Clicking submit will activate all the choices.)
Job Codes

Choosing Job Codes on this prompt page is optional. However, if a department chooses a job code(s) to include in the custom report, there are different ways to determine the appropriate use of job codes.

- Job codes are dependent upon the employee group(s) that are chosen. For example, if “All Faculty” is chosen as the only employee group then ONLY job codes within the faculty employee group will be included in the report. Likewise, if the employee groups selected were “Academic Administrative” and “Managerial” then only the job codes from those two different employee groups would be included in the report.

- In addition to already chosen Employee group(s), other specific job codes can be selected from the complete list of job codes (see below) and included in the report results.

- If a department requires only specific job codes, they should choose from the list of job codes below and NOT choose any specific Employee group(s).

NOTE: the program for creating customized reports does NOT include job codes 0001, 0004, 0011, 8900. If any of those job codes are required in the final results, they need to be added using this prompt page.

Choosing one or more Job Code(s) is optional. (See conditions above.)

Click “Submit”.
HRMS Business Process: Custom Campus Mailings & Email Lists

Prompt Selection for Custom Campus Mailing and Email List Report

Custom ➔ A ➔ L1 ➔ 07 ➔ ALL

Select Appointment Terms to Exclude below:

- Exclude um_appt_term_cd in ('0', 'S', 'Y', 'Z')
- Include um_appt_term_cd in ('0', 'S', 'Y', 'Z')

It is likely that any campus addresses for individuals with "0", "S", "Y", "Z" appointment terms will either be out-of-date or non-existent. Because it is the department's responsibility to maintain campus addresses, lack of oversight in this area has become a significant data integrity issue resulting in bad campus addresses. Because of this, it has been practice to not include these appointment term codes in address requests.

- "0" = Zero is used for system conversion purposes
- "S" = Summer Session individuals may only teach for a summer session and a campus address is not maintained
- "Y" = Summer Research individuals may conduct research only for a period of time during a summer and a campus address is not maintained
- "Z" = Individuals with "Z" terms are hourly appointments and campus addresses are not maintained.

To "exclude" individuals with these appointment terms is the default, but as indicated above, there is an option to include these appointment terms as well.

Choose the appropriate option.

Click “Submit.”
Customized Campus Mailing report results:

- **Prompt Path** – displays all the prompt screens used to create the campus address list. NOTE: even at this point, users can click on any of the prompt links and the system will go back to that prompt screen so the list can be rebuilt if needed.

- **Custom Campus Mailing** – name indicates that this was a custom campus address mailing list request and not one of the other standard campus mail lists or a custom campus address e-mail list.

- **Employee Status, Location, Percent, Faculty Group, Exclude Appt Terms** - describes all the selections the user made to create the list.

- **Count** – the number of individuals that fit all of the requested criteria.

- **Excel, CSV, PDF** – choosing one of these will download the information into a specific format. For Addressing & Mailing purposes, the Excel file must be used. **(NOTE: If users receive the error “File error: data may have been lost” when downloading the file to Excel, disregard the error. It is probable that a browser issue is the problem. As far as the report is concerned, no data is lost.)**

- **Bookmark** – provides the ability to bookmark this report on the user’s UM Reports home page for future use.

**Example:**

```
<table>
<thead>
<tr>
<th>EmpNo</th>
<th>Name</th>
<th>Department</th>
<th>RoomBuilding</th>
<th>CampusMailCode</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>Postal</th>
<th>LastName</th>
<th>FName</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567</td>
<td>Jane Doe</td>
<td>Anthropology</td>
<td>Room 395</td>
<td>HHHCtr</td>
<td>7455</td>
<td>301 19th Ave S</td>
<td>Minneapolis MN</td>
<td>55455</td>
<td>Doe</td>
<td>Jane</td>
</tr>
</tbody>
</table>
```
Standard Campus Address Mailing Lists

If either “TC Faculty & Staff Campus Mail Addresses” or “TC Administrative E-mail List Campus Mail” are chosen, the UM Report will immediately process and produce the requested list of campus mailing addresses. Unlike the Custom Campus Mail list, no other choices can be made.

Choose “Select TC Faculty and Staff Campus Mail Addresses” or “Select TC Administrative E-mail List Campus Mail Addresses”.

Click “Submit”. *(Submit button is behind the drop down window.)*

Examples of each report results:

<table>
<thead>
<tr>
<th>Prompt Path: Campus Mailing List</th>
<th>Report Run Date: Friday, 5/14/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Campus Mailing and Email List</td>
<td>TC Faculty and Staff Campus Mail Addresses</td>
</tr>
<tr>
<td>Count: 11394</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Name</td>
</tr>
<tr>
<td>-------</td>
<td>------------</td>
</tr>
<tr>
<td>1234567</td>
<td>Jane Doe</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prompt Path: Campus Mailing List</th>
<th>Report Run Date: Friday, 5/14/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Campus Mailing and Email List</td>
<td>TC Administrative E-mail List Campus Mail Addresses</td>
</tr>
<tr>
<td>Count: 123</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Name</td>
</tr>
<tr>
<td>-------</td>
<td>------------</td>
</tr>
<tr>
<td>0112233</td>
<td>John Doe</td>
</tr>
</tbody>
</table>

Notice the difference in counts of these two standard reports. The numbers are representative of their respective populations.
Custom Email Lists

All Custom E-mail Lists require prior approval from University Relations. http://www1.umn.edu/urelate/index.html

It is important to discuss with University Relations the different resources available for sending out mass e-mails. URelations has several standard e-mail list options to choose from that may be much more suitable to a department's needs.

For more detailed information: http://www1.umn.edu/twincities/faculty-staff/toolkit/UR_ARTICLE_144350.html

To create a custom e-mail list, choose “Select Custom E-mail List” on the first prompt page of the report. (NOTE: The dropdown menu has no effect on the custom e-mail choice.)
Choosing “Select Custom Email List” brings the user to this acknowledgement page. Read it carefully and consult with University Relations for further approval. If the user has received approval to create a custom e-mail list, click on the “I Agree” link to continue.

University Relations will provide instructions on how to process the mass e-mail communication when it is ready for delivery.

Choose one or more Employee Status(es).

Click “Submit”.

**IMPORTANT NOTE:** At the top of each report page, the selections which have been made along the way will appear and build a “prompt path”. Users are able to click back through the prompt path if they want to change their choices.
Choosing either of these selections to be EXCLUDED is optional, but there are conditions to consider:

If the Twin Cities campus was chosen with a combination of any other campus except for Duluth, there is an option to exclude either Duluth School of Medicine and/or the Duluth Pharmacy Program. (NOTE: The Duluth School of Medicine and the Duluth Pharmacy Program are automatically included in the Twin Cities campus for campus address e-mailing purposes.)

Make the appropriate selection if excluding either choice.

Click "Submit".

Choosing a Location is optional. If a selection is NOT made, the data will include all Locations.

Choose one or more Locations(s).

Click “Submit”.  

---

**HRMS Business Process: Custom Campus Mailings & Email Lists**

**Prompt Selection for Custom Campus Mailing and Email List Report**

Select one or more Twin Cities exclude option(s) below:

This is optional, a selection is not required.

Use shift click or control click for selecting multiple values...

DMED - DULUTH SCHOOL OF MEDICINE
837A - Duluth Pharmacy Program

Submit Reset

---

**Prompt Selection for Custom Campus Mailing and Email List Report**

Select one or more Location(s) below:

This is optional, a selection is not required.

Use shift click or control click for selecting multiple values...

STPAUL TCWESTBANK, TC EASTBANK
STPAUL
TC EASTBANK
TC WESTBANK
Crookston (U.S. Mail bundled rate postage)
Duluth (U.S. Mail bundled rate postage)
Morris (U.S. Mail bundled rate postage)
Rochester (U.S. Mail bundled rate postage)
Off campus (U.S. Mail requires postage)

Submit Reset

---
Choosing a College is optional. If a selection IS made, it will limit the data to only college(s) that have been chosen. If a selection is NOT made or skipping this prompt entirely is the same as selecting all colleges. (The “Select All” link at the top of the list will automatically select all of the colleges.)

Choose one or more College(s).

Click “Submit”.
The default is “Select Percent Time Range”. If that is the preferred option, choose from the standard appointment percentages available in the dropdown.

OR

Click “Enter Percent Time Range” and type in a percent time start and percent time finish (screen shot below).

Click “Select Percent Time Range” and choose from standard appointment percentages or click “Enter Percent Time Range” and type in a percent time.

Click “Submit”.
Employee Groups

**Selections from any employee group is optional.** However, different conditions exist depending upon the choice(s):

- If no choice is made in any of the employee groups or altogether skipping these four prompts all employee groups will automatically be chosen.
- If a choice is made from only one employee group, that choice will exclude all other employee groups.
- If a selection(s) is made from more than one employee group then only those selections from those employee groups will be included in the final results.

### Prompt Selection for Custom Campus Mailing and Email List Report

**Acknowledgement**

This is optional, a selection is not required. Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

*Use shift click or control click for selecting multiple values...*

- All Faculty
- Tenured
- Tenure Track
- Non-Tenured/Tenure Track
- Contract, Contract/Med Sch
- Temporary
- Visiting
- Adjunct, Clinical

Choosing a Faculty group is **optional.** *(See conditions above.)*

### Professional/ Administrative group(s) below:

This is optional, a selection is not required. Selecting one or more of the employee groups below will limit the data only to those employee groups selected. Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

*Use shift click or control click for selecting multiple values...*

- Academic Administrative
- Academic Administrative (Managerial)
- Academic Professional
- Academic Professional (Managerial)
- Academic Professional (Non-teaching)
- Academic Professional (Teaching)

Choosing one or more Professional/Administrative group(s) is **optional.** *(See conditions above.)*
HRMS Business Process: Custom Campus Mailings & Email Lists

Select one or more Student Employee group(s) below:

- This is optional, a selection is not required.
- Selecting one or more of the employee groups below will limit the data only to those employee groups selected.
- Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...
- Graduate Administrative Assistants
- Graduate Research Assistants
- Graduate Teaching Assistants
- Non-Employee Academic
- Professionals in Training
- Undergraduate Academic
- Undergraduate Non-Academic

Choosing one or more Student Employee group(s) is **optional**. *(See conditions above.)*

Select one or more Non-Academic Staff group(s) below:

- This is optional, a selection is not required.
- Selecting one or more of the employee groups below will limit the data only to those employee groups selected.
- Not making any selection or altogether skipping these four employee group prompts is the same as selecting all employee groups.

Use shift click or control click for selecting multiple values...
- Civil Service (Non-Union Represented)
- Clerical and Office
- Confidential
- Crafts and Trades
- Health Care Non-Prof and Svc
- Law Enforcement
- Managerial
- Non-Instructional Professional
- Nursing Professional
- Supervisory
- Svc Maint and Labor
- Technical
- Union Represented

Choosing one or more Non-Academic Staff group(s) is **optional**. *(See conditions above.)*

Click “Submit”.

*(The previous four screen shots appear on one prompt page when building the customized report. Clicking “Submit” will activate all of the choices.)*
HRMS Business Process: Custom Campus Mailings & Email Lists

Job Codes

Choosing Job Codes is optional. However, if a department chooses a job code(s) to include in the custom report, there are different ways to determine the appropriate use of job codes.

- Job codes are dependent upon the employee group(s) that are chosen. For example, if “All Faculty” is chosen as the only employee group then ONLY job codes within the faculty employee group will be included in the report. Likewise, if the employee groups selected were “Academic Administrative” and “Managerial” then only the job codes from those two different employee groups would be included in the report.

- In addition to already chosen Employee group(s), other specific job codes can be selected from the complete list of job codes (see below) and included in the report results.

- If a department requires only specific job codes, they should choose from the list of job codes below and NOT choose any specific Employee group(s).

NOTE: the program to create customized reports does NOT include job codes 0001, 0004, 0011, 8900. If any of those job codes are required in the final results, they need to be added using this prompt page.

Choosing one or more Job Code(s) is optional. (See conditions above.)

Click “Submit”.

Use the scroll bar for a complete list of Job Codes.
It is likely that any campus addresses for individuals with the above appointment terms will either be out-of-date or non-existent. Because it is the department's responsibility to maintain campus addresses, lack of oversight in this area has become a significant data integrity issue resulting in bad campus addresses. As a result it has been practice to not include these appointment term codes in address requests.

- “0” = Zero is used for system data conversion purposes
- “S” = Summer Session individuals may only teach for a summer session and a campus address is not maintained
- “Y” = Summer Research individuals may conduct research only for a period of time during a summer and a campus address is not maintained.
- “Z” = Individuals with “Z” terms are hourly appointments and campus addresses are not maintained for these people.

To “exclude” individuals with these appointment terms is the default, but as indicated above, there is an option to include these appointment terms as well.

Choose the appropriate option.

Click “Submit”.
Customized E-mail Address Mailing list results:

- **Prompt Path** – displays all the prompt screens used to create the e-mail address list. NOTE: Users can click on any of the prompt links and the system will go back to that prompt screen.
- **Custom E-mail List** – indicates that this was a custom e-mail address mailing list request and not a custom campus address list.
- **Employee Status, Location, Percent, Faculty Group, Exclude Appt Terms** - describes all the selections the user made to create the list.
- **Count** – the number of individuals that fit all of those criteria.
- **Excel, CSV, PDF** – choosing one of these will download the information into a specific format. For Addressing & Mailing purposes, the Excel file should be used.

Attention: Users may receive errors messages when downloading the report to Excel. 
- “File error: data may have been lost”. Tab through the message. As far as the report is concerned, no data is lost.
- “To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options…”. This is a browser issue. To fix this both in Internet Explorer and Firefox, go through this navigation: Tools, Internet options, Security, Custom Level, Downloads, Automatic prompting for downloads – change this to ENABLE, Ok, Ok.

- **Bookmark** – provides the ability to bookmark this report on the user’s UM Reports home page for future use. Ex:

  - **Distribution Instructions**

  Procedures to disseminate the mass email are determined by University Relations and communicated to the department at the beginning of this process. Questions should be referred to URelations.
Addressing & Mailing Processing

Follow these steps to process a mass mailing request:

1. Contact Addressing & Mailing for a Job number. (This can be done at any time.) Call their customer service line, 612-626-0222 or email them at addrmail@umn.edu to request a Job number. The Job # should be referenced in the subject line of the email when sending the Excel file to Addressing & Mailing.

2. Run the report the day of or just one day prior to sending the file to Addressing & Mailing. This will ensure the most recent and comprehensive data is collected.

   (Optional: Run the report in advance to determine numbers and how many addresses may need to be cleaned up on the spreadsheet.)

3. Clean up addresses on the Excel spreadsheet and format file (pgs 26-29) before sending the file to Addressing & Mailing. (Addressing & Mailing will accept almost any version of Excel. If there are compatibility questions, Addressing & Mailing will consult with the unit.)

4. Send the original to Addressing & Mailing.

   (Optional: Save a temporary copy internally however, do not reuse files more than a few days old as the information quickly becomes outdated.)

Campus Mail Address Cleanup

It is absolutely critical that departments cleanup the Excel file before sending it to Addressing & Mailing.

If Addressing & Mailing determines the Excel file is not “mail-ready”, the department will be assessed charges for any additional processing efforts. (Remember, if this happens the department’s timeline for sending out the information will be compromised as will the cost of the project.)
Preparing the Excel File for Addressing & Mailing Submission

Campus addresses can often be missing or entered incorrectly resulting in excel lists that must be reviewed and adjusted each time a Campus mailing is pulled. In central HRMS’ experience, the procedure outlined on the following pages is the best method for ensuring that Addressing and Mailing receives a usable spreadsheet.

At a minimum, this information must be cleaned up:
- Department
- Room /Building
- Campus Mail Code

In addition to the standard address cleanup described above:
- DELETE all rows above the header row.
- DELETE the EmplID before sending the list to Addressing and Mailing (Empl ID is treated as PRIVATE data.)
- Last Name & First as individual fields are provided at the end of the spreadsheet as tools in case a Unit wants to fine tune the list by sorting by name. DELETE the Last Name & First columns before sending to Address & Mailing.

NOTE: Units may not want Off Campus Addresses, such as those requiring U.S. Postage (mail codes beginning with “Z”, i.e. Z1VAMC – VA Medical Center) and those to another campus (i.e. D022- Duluth Registrar) in their mailing; these can be eliminated. However, if these addresses are to be mailed to they must have accurate Street, City and Postal addresses.
The following spreadsheet examples show the results of a campus mailing request from UM Reports:

### Step 1. Sort first by Campus Mail Code

Note: If the Campus Mail Code is missing Addressing & Mailing will not create a mailing label. Either locate the mail code and enter it or delete the row.  
http://www.a-m.umn.edu/CM/campcode.htm

<table>
<thead>
<tr>
<th>Example</th>
<th>Name</th>
<th>Department</th>
<th>ROOM/BUILDING</th>
<th>CAMPUS MAIL CODE</th>
<th>STREET</th>
<th>CITY</th>
<th>STATE</th>
<th>POSTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Leo T</td>
<td>Concerts and Lectures</td>
<td>204 Vincent Hall</td>
<td>206 Church St E</td>
<td>Minneapolis</td>
<td>MN</td>
<td>55455</td>
<td></td>
</tr>
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</table>

This is an example of a spreadsheet sorted by Campus Mail Code. Those without Campus Mail Codes will usually sort to the bottom. (Depending on other misplaced information, some mail codes will sort within the body of the spreadsheet.) Be sure to do a thorough review of the excel file to find all the rows with a missing mail code.

- Examples of rows with missing mail codes: 19, 24, 25, 26, 27, 28, 29, 30
- Examples of misplaced information in Campus Mail Delivery Code field: 20, 21, 22, 23

Either enter the correct Campus Mail Code or delete the row. When looking up a campus mail code, spot check the accuracy of the rest of the address.

(Note: At the initial printing of this document mail codes were still being developed for a few departments. If a mail code is not found on the above link, eliminating that address is an option.)

Note: If US Postal Addresses and Off Campus Address are not required, they can be eliminated at this point. Then the Street, City and Postal columns can be deleted.
Step 2. Resort by Campus

After entering the correct Campus Mail Code or deleting the row, resort the spreadsheet by Campus Mail Code to integrate the changes where they belong.

Step 3. Blank Fields

Identify any blank fields in Department or Room Building (include Street, City and Postal in this step unless they are being disregarded for the mailing).

Addresses with yellow highlights are incorrect. See below for explanations.

<table>
<thead>
<tr>
<th>Example</th>
<th>NAME DEPARTMENT</th>
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<th>CITY</th>
<th>STATE</th>
<th>POSTAL</th>
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Note: Blank fields can be problematic for Addressing and Mailing and can result from:

- Data in the wrong fields (i.e. Room/Building in the Department field)
- Incorrect or no official building abbreviation
- Missing Department Name

Either correct the information on the spreadsheet or delete the row. Correct information can be found at: http://www.a-m.umn.edu/CM/campcode.htm
HRMS Business Process: Custom Campus Mailings & Email Lists

Step 4. Visual Inspection of each column

With like information sorted together and no blank rows, do a visual inspection of each column to look for outliers.

Department - Department names beyond 30 characters will be truncated which may make the department name unrecognizable. Options are to 1) abbreviate the department name, 2) delete the row, or 3) leave it as is and the name will appear truncated. To abbreviate the department name correctly, see the official Department Listing http://www.directory.umn.edu/twincities.cfm

Room/Building - Official building abbreviations must be used. If you notice an address unlike others for the same building, confirm the accuracy of the address at http://www.a-m.umn.edu/CM/campcode.htm

For a list of official University building abbreviations and addresses check out: http://www1.umn.edu/systemwide/directories/building.html#h

Campus Mail Code – each row must contain an official Campus Mail Code.

Step 5. Send the final Excel file to Addressing & Mailing as an attachment to an email. (Remember to reference the Job# in the subject line of the email.)
Private Data Requests

Information is considered private when it falls under the following categories:

- Ethnicity
- Gender
- Date of Birth
- Disability Status
- Home Address
- Social Security Number
- Citizenship Status
- Military Status
- EmplID (HRMS purposes)

To request a query based on Private Data:

1. Call Joanne Gustafson, HRMS, 612-626-1656 to discuss the data request.

2. Email Susan McKinney mckin018@umn.edu, General Counsel’s office, to request permission to use private data and providing justification for use of the private data.