

BANNER ALUMNI/DEVELOPMENT DATA RETRIEVAL REQUEST FORM

Submit this form to  
Development Information Services  
John Dodge House, Oakland University (fax 248-364-6101)

**D.I.S. Only**

Date Received: \_\_\_/\_\_\_/\_\_\_

Job # \_\_\_\_\_

Approved by \_\_\_\_\_, Director of Development Information Services

Requestor: \_\_\_\_\_ Department: \_\_\_\_\_

Campus Address & Email Address: \_\_\_\_\_

Contact Person's Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Date Submitted: \_\_\_\_\_ Date Needed By: \_\_\_\_\_

Have you previously requested a similar or identical output? \_\_\_\_ YES \_\_\_\_ NO Maximum number of records: \_\_\_\_\_

Name of Person who requested previous request: \_\_\_\_\_

Date of the previous request: \_\_\_/\_\_\_/\_\_\_ Job #: \_\_\_\_\_

**How will you use this output? Please check all that apply:**

- Contact with alumni or donors     Fundraising Solicitation     Event Invitation     Newsletters     Departmental Information
- Prospecting/Research     Management Report     Telefund    Other: \_\_\_\_\_

**Please describe your request: (REQUIRED)**

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If this is a fundraising solicitation, please indicate the solicitation code & description: \_\_\_\_\_

If you do not have a solicitation code please contact the Gift Accounting Manager at 364-6115 or email [tallen@oakland.edu](mailto:tallen@oakland.edu) to request one.

**Solicitation Information (Check all that apply)**

- | Include               | Exclude               | Records coded as:                  |
|-----------------------|-----------------------|------------------------------------|
| <input type="radio"/> | <input type="radio"/> | Do not solicit (DNS)               |
| <input type="radio"/> | <input type="radio"/> | No fall telefund calls (NFT)       |
| <input type="radio"/> | <input type="radio"/> | No OUAA Magazine (NMG)             |
| <input type="radio"/> | <input type="radio"/> | Never Call (NVC)                   |
| <input type="radio"/> | <input type="radio"/> | Never Mail (NVM)                   |
| <input type="radio"/> | <input type="radio"/> | No planned giving newsletter (NPG) |

**Output Disposition: Check all that apply**

- Send to Contact Person listed above via Campus Mail
- Send to Contact Person listed above via Electronic Mail
- Send to OU Printing & Mailing Services
- FTP to Non-OU Mailing Services

**Output Format: Check all that apply**

- Hardcopy Report
- Datafile
  - Excel file
  - Access Database

**Indicate Name and Address of Non-OU Mailing Services below**

Mail Service Name \_\_\_\_\_

Mail Service Contact Person's Name & Phone # \_\_\_\_\_

Mail Service Address \_\_\_\_\_

FTP/E-mail Address \_\_\_\_\_

**Report Criteria (Check all that apply. Categories left blank will not affect your selection)**

**Constituents**

Household pairing:  Single (S)  Combined (C)

**Include Exclude**

- Alumni (ALUM)
- Parent (PRNT)
- Faculty/Staff (FAST)
- Retired Faculty/Staff (RFAC)
- OU Foundation Dir. (OUFD)
- Trustee (TRUS)
- Other Individual (OTHI)
- Friend (FRND)

**Organizations**

**Include Exclude**

- Corporation (CORP)
- Foundations (FOUN)
- Other Organizations (OTHO)
- Religious Organization (RELO)

**Record Status:**

**Exclude:** Deceased

**Employment Information: (Check all that apply)**

**Include Exclude**

- Current Employer (if in Banner)
- Current job title (if in Banner)
- Only employees of (company name, Banner ID if known) \_\_\_\_\_

**Academic Criteria: (Check all that apply) This section relates to an individual's OU degree information**

OU undergraduate degree holders  OU graduate degree holders

**School(s):** CAS, SBA, SEHS, SECS, SHS, SON

**Include:**  All Schools  Specific Schools \_\_\_\_\_

**Degree(s):** Undergraduate or Graduate

**Include:**  All degrees  Undergraduate only  Graduate only  Preferred degree only

**Class years:**

**Include:**  All class years  Specific class years \_\_\_\_\_

**Majors:** (please include major code and descriptions)

**Include:**  All majors  Specific majors \_\_\_\_\_

**Department:**

**Include:**  All departments within school  Specific departments within school \_\_\_\_\_

**Address Criteria: (Check all that apply) This section relates to a constituent's or organization's mailing address, business address as well as geographic location.**

**Include:**  Active preferred address  Active permanent address (01)  Active Business address (BU)

**Exclude:**  Active preferred address  Active permanent address (01)  Active Business address (BU)

USA  Foreign Countries

States: \_\_\_\_\_ Countries \_\_\_\_\_

Zipcodes: \_\_\_\_\_

Zipcode Radius's: Records within a \_\_\_\_\_ mile radius of \_\_\_\_\_ zip code

**Salutations:** *This section relates to the salutations for a letter and the addressee for the outside of an envelope or piece of mail.*

- Salutation:**
  - Joint** (FORM) example: Mr. and Mrs. Doe
  - Individual** (PRIN) example: Mr. Doe
- Addressee:**
  - Joint** (JOIN) example: Mr. and Mrs. John B. Doe
  - Individual** (INDI) example: Mr. John B. Doe

**Additional Information** *This section relates to various information available in Banner records.*

- Activities/Student activities/Committees/Boards (*list can be found in APAACTY by double-clicking in "activity" field.*)  
**Include:**  All activities    Specific activities \_\_\_\_\_  
\_\_\_\_\_
  - Athletes (*athlete codes are also found in APAACTY by double-clicking in "activity" field.*)  
**Include:**  All sports    Specific sports
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**Donor Information:** *If your request involves specific gift information, you must complete this section. Check all that apply. To specify more than one population of donors, attach separate request form.*

- |                |                             |                               |                                   |                                      |
|----------------|-----------------------------|-------------------------------|-----------------------------------|--------------------------------------|
| <b>Include</b> | <input type="radio"/> Gifts | <input type="radio"/> Pledges | <input type="radio"/> Memo credit | <input type="radio"/> Matching Gifts |
|                | Date range: _____           |                               |                                   |                                      |
| <b>Exclude</b> | <input type="radio"/> Gifts | <input type="radio"/> Pledges | <input type="radio"/> Memo credit | <input type="radio"/> Matching Gifts |
|                | Date range: _____           |                               |                                   |                                      |

**Amount range:** \_\_\_\_\_

**Designations:** (*Example*) 30085 SEHS Gift Fund

**Include:**  All designations    Specific designations \_\_\_\_\_

**School/Division:**

**Include:**  All schools/divisions    Specific schools/divisions \_\_\_\_\_

**Departments:**

**Include:**  All departments    Specific departments

**Solicitations:**

**Include:**  All solicitations    Specific solicitations

Date range: \_\_\_\_\_

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**Membership Information: (Check all that apply)** *This section relates to an individual's participation in an OU membership program.*

**Membership Programs:**

- | <b>Include</b>        | <b>Exclude</b>              |
|-----------------------|-----------------------------|
| <input type="radio"/> | <input type="radio"/> OUAA  |
| <input type="radio"/> | <input type="radio"/> PCLUB |

**Membership Categories:** (*see ATVAMCT for list*)

- | <b>Include</b>        | <b>Exclude</b>                                  |
|-----------------------|-------------------------------------------------|
| <input type="radio"/> | <input type="radio"/> All categories            |
| <input type="radio"/> | <input type="radio"/> Specific categories _____ |
| <input type="radio"/> | <input type="radio"/> Specific categories _____ |

**Membership Status:**

**Include**

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**Exclude**

- Active
- Inactive
- Expired
- Delinquent

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**Additional comments**

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***Requestor's Signature***

***Date***

**Please Note: Requests must be received by Development Information Services ten working days prior to needed completion date. Emergency requests will be accommodated as the processing schedule allows. Please contact the Director of Development Information Services for help in completing this form.**