

UM Alumni / Friend Database Request

Page :

REQUEST FOR DATABASE INFORMATION

The University of Montana maintains a single database of directory information (demographic, academic, personal and statistical) of all alumni relations constituents. This database may include graduates, former students, current students, parents, donors and other entities or individuals. The University of Montana recognizes and authorizes this single database to be managed and maintained by the Alumni Relations Office. With the assistance of affiliated departments and organizations, more than 150,000 records are stored and maintained on this database.

The UM Alumni Database is for official University use only. Use of this information for any other purpose is strictly prohibited without advanced written permission.

This form is used to request spreadsheets, contact lists for UM Alumni or Donors and to send broadcast emails to that audience. This form provides the criteria needed to complete most requests, if you have criteria not included in this form, contact a manager (info below) for assistance.

This request will involve several offices and may take up to 5-7 business days to process after final approval is received. It is recommended that requests be submitted 2 weeks prior to deadline.

Reminders:

- * This is a request only, to finalize a Dean or Dean's Designee must indicate approval by submitting signed form to the Office of Alumni Relations. The form will be emailed to the address indicated on page 7.
- * If you are soliciting funds via a mailing or email, you must set up a Solicitation Code with Annual Fund. This code facilitates reporting on the results of the solicitation. Contact Sarayl Yellowhorse at x2575 with questions.
- * Please complete all fields necessary for your requests. Note the type of request you have selected on the next page and follow the instructions indicating the required pages. Some fields are mandatory, these are indicated by a *. The UM Office of Alumni Relations and UM Foundation reserves the right to reject requests with insufficient criteria.
- * If you plan on requesting this same group regularly, please indicate at the end of the request. This will facilitate future requests.
- * Please review the report after you receive it. If you have questions, please contact the person that provided the report to you.
- * Reports/Downloads represent a snapshot in time of the underlying data. Changes to that data today (gift adjustments, additions, deaths, address changes, marriages, etc.) can result in the same report/download having different results tomorrow.

If you wish to see the information needed without accessing the online request form, click here for a list of questions. (link)

For assistance, please contact:

Crystal Wood, Alumni Records Manager, Office of Alumni Relations, crystal.wood@umontana.edu
 Terri Casillas, Data and Reporting Manager, UM Foundation, teresa.casillas@mso.umt.edu

UM Alumni / Friend Database Request**Page 2****Report Type**

1. Report Type:*

Select only one.

- Standard (Excel spreadsheet, best for mailings or in-house review)
- Academic History (Excel spreadsheet, includes degree info)
- Broadcast Email (Sent from the Office of Alumni Relations)
- Profile Report - Event Attendees (Alumni/Fdn use only)
- Event Attendee coding (Alumni/Fdn use only)
- Giving Report
- Ready to print on labels (Word - indicate label type here)

2. For what purpose will you be using this information?*

The requested information is being provided for one-time use only.

3. Will you use this information to ask for a donation?*

If yes, approval is required from the UM Foundation. Please contact Sarayl Yellowhorse with the UM Foundation at x2575 for assistance.

- No
- Yes. Indicate assigned solicitation code here:

Please complete the following pages as indicated below to complete your request. Instructions will also be included on each page as a reference. Page numbers are at top right corner of screen.

Standard, Academic History and Word (Ready to Print):
Pages 3, 4, 7

Broadcast Email:
Pages 3, 5, 7

Giving Report:
Pages 3, 4, 6, 7

Profile Report and Event Coding:
Pages 3 (Question # 7 "Event Code"), 7

UM Alumni / Friend Database Request**Page 3****Criteria Specifications****Complete this page for the following requests:**

- Standard
- Academic History
- Broadcast Email
- Giving Report
- Word (Ready to print labels)
- Profile report / Event Attendee Coding (Question 7, "Event Code" only)

4. Constituent preferences:*

- People
- Non-Individuals
- Both

5. Alumni Criteria

Only Degrees, Majors, Minors, Concentrations listed will be included. Please be specific.

College and Class Year(s):

Degree/Major(s):

Minor/Concentration(s):

6. Donor Criteria

If you would like friends/donors included in this request, a time frame and donation amount must be indicated here. Answering 5 years and \$100 cumulative below will include donors to your school/department for the past 5 years that have donated a total of \$100 during that time. If you need assistance with this section, contact Terri Casillas at x2327 or teresa.casillas@mso.umt.edu.

Solicitation or Unit Code:

Time Frame of donations:

Donation amount (indicate cumulative or one-time):

7. If your target audience/criteria are not alumni or donors, but an event or activity, please indicate here.

Event Code:

Activity Code/Description:

Advisory Board Code(s):

8. If your criteria request is not covered in the above options, please include it here.

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Page 4

Excel or other report request

Complete this page for the following requests:

- Standard
- Academic History
- Word (Ready to print labels)
- Giving Report

9. Please indicate information to be included, Banner ID, Name, Salutation and Sort Name columns are automatically included:
Email addresses are typically not released in report form. Please contact Crystal Wood at crystal.wood@umontana.edu with questions regarding current email procedures.

- Mailing Address
- Phone Number
- Business Information
- Preferred College/Preferred Class Year
- First/Last Names in separate fields (incl. spouse)
- Household ID (useful for sorting)
- Email addresses (please explain)

10. Lost and Deceased Preference
The standard settings exclude Lost and Deceased constituents from reports. If you would like them included, please indicate that here.

- Include Lost
- Include Deceased

11. Salutation and mail name selection

- Informal (Greg and Susan)
- Formal (Mr. & Mrs. Hansen)

12. Please make your geographic selection here.

- Include all US and international mail/email addresses
- Include US and Canada addresses only
- Include US addresses only
- Include only specific geographic region I have indicated here (zip code ranges preferred):

13. Spousal Preference

Selecting "List as Couple" will group spouses regardless of meeting other criteria indicated on this form. Selecting "List Separately" will list individuals that meet the criteria; spouses will not be indicated. Skip this question if requesting a Giving Report.

- List Separately
- List as Couple

14. Select sort preference

Skip this question if requesting a Giving Report.

- Zip code
- Last name
- Preferred class year
- Other, please specify

15. Please indicate distribution preference:

Select all that apply

- Campus Mail
- Send to The Directory
- Send to Campus Mail Services
- UM Foundation shared folder (select if UM Fdn Employee)
- Alumni Office shared folder (select if Alumni Office Employee)
- Email, provide **official UM** email address here:

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Page 5

Broadcast email request

Complete this page for Broadcast Email requests only.

- Please forward final version of the email with the subject line indicated to alumniwebmaster@mso.umt.edu at least 3 days before the requested send date, 5-7 days is recommended.
- If email is an HTML file or a .JPG image, please also forward a text version written in a program like Notepad. It is highly recommended that Microsoft products such as MS Word and MS Publisher are not used to create broadcast emails as they will produce unpredictable results. PDF files must be loaded onto a website and linked to within the email text, they cannot be used in place of a .jpg or .html.
- Contact the Office of Alumni Relations with questions regarding this process at x5211.
- If a department is interested in designing their own email within the Email Marketing program, please email alumniwebmaster@mso.umt.edu to schedule a training session.

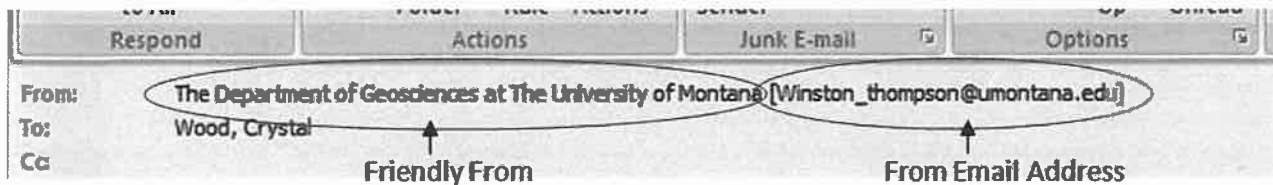
16. Broadcast email specifications

Requested send date:

Friendly From (see illustration below):

From email address (see illustration below):

Reply email address:



17. BCC email addresses:

Please separate using commas.

18. Subject Line

Ten (10) words or less.

19. Does the department want an email summary provided approximately 1 week after send date?

Email summary will include a list of recipients, how many of those recipients opened the email and if links are included, how many clicks each link received.

- No
- Yes. Indicate email address to send report. If blank, no report will be sent.

20. I agree that this event, newsletter or other news item may be posted online on sites such as grizalum.com, Facebook, UM Alumni Blog and Twitter by the Office of Alumni Relations.

- Yes No

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Giving Report

Complete this page for Giving Report requests only.

21. Gift Information Requested:

- Designation
- Gift Date
- Gift Amount
- No Credit Transactions
- Other, please specify

22. If cumulative giving is to be included make selection here:
Not available on all reports.

- Individual Cumulative
- Household Cumulative

23. Sort order for PDF format:
Only include fields to be used in sort order, number starting with 1.

Banner ID	<input type="text"/>
Last name (does not list spouses together):	<input type="text"/>
State:	<input type="text"/>
Zip code:	<input type="text"/>
Gift Amount:	<input type="text"/>
Gift Date:	<input type="text"/>
Degree:	<input type="text"/>
Grad Year	<input type="text"/>
Household ID (list spouses together):	<input type="text"/>

24. Please include any additional criteria, needs, output, special instructions regarding Giving Report.

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Requestor Information

Complete this page for all requests.

25. Contact Information:*

Requestor Name:
College/Unit:
Department:
Phone Number:

26. Is this a process that will be requested regularly?*

- Yes, this will be requested at least once yearly.
- No, this is a unique request for one time only.
- Other, please specify

27. Please provide the email address the request confirmation should be sent to:*

Official University of Montana email addresses preferred.

28. Please provide any additional comments or information regarding this request.