

REEHER PLATFORM ACTIVITY CENTER FILE EXPORT GUIDE

VERSION 2017.4

*(CHANGES FROM PREVIOUS ACTIVITY
CENTER EXPORT GUIDE VERSION
2017.3)*



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Overview

The Reeher Platform's Activity Center File Export Guide is designed to provide you information on the output files created for you by Reeher as a part of your Activity Center subscription.

Nightly File Export

As a part of your subscription to Activity Center, Reeher provides you with the contact report, task, and proposal data entered by your users in the Reeher Platform. This data is refreshed each night, and always contains all data entered by your users, as opposed to only containing the daily updates. The file is exported to your folder's SFTP "download" folder, which is on the same site as the "upload" folder that your institution uploads its files for Reeher, and is updated at the same time that we process your nightly data files.

File Format

The files are exported as text files, and use a || delimiter.

Naming Conventions

The exported files are named reeher_activities_2017_4.txt, reeher_tasks_2017_4.txt, reeher_proposals_2017_4.txt, reeher_proposal_assignments_2017_4.txt, reeher_prospect_2017_4.txt, reeher_contact_related_contact_2017_4.txt, reeher_contact_related_task_2017_4.txt, reeher_proposal_related_contact_2017_4.txt, reeher_proposal_related_task_2017_4.txt, and reeher_proposal_master_proposal_2017_4.txt.

File 1: Reeher Contact Reports (updated field name- field number 30 used to be "Next Steps"; added field number 33)

This file contains all contact reports entered by your users in the Reeher Platform. Contact Reports can have multiple records if multiple entities or officers were associated with the contact.

Number	Name	Description	Format
1	Activity ID	Unique reference ID of the activity.	string/text
2	Entity ID	ID of entity related to the activity.	string/text
3	Officer ID	ID of officer related to the activity.	string/text
4	Activity Type Description	i.e. Visit, Phone Call, Email, etc.	string/text
5	Activity Date		mm/dd/yyyy
6	Start Time		hh:mm tt
7	End Time		hh:mm tt
8	Activity Purpose Description	i.e., Cultivation, Identification, Information, Qualification, Solicitation, Stewardship	string/text
9	Measured Indicator		string/text
10	Active Indicator		Yes or No
11	Creator	User who created the activity.	string/text
12	Created Date	Date the activity was created.	MM/dd/yyyy HH:mm:ss
13	Modifier	User who last modified the activity.	string/text
14	Modified Date	Date the activity was last modified.	MM/dd/yyyy HH:mm:ss
15	Subject/Title	Short description of the activity. (150 Character Limit)	string/text
16	Description/Summary	Full description of the activity. (12,000 Character Limit)	string/text
17	Status	i.e., Planned, In Progress, Completed, Overdue	string/text
18	Activity Type Code		string/text
19	Activity Purpose Code		string/text

20	Creator ID	ID of user who created the activity.	string/text
21	Modifier ID	ID of User who last modified the activity.	string/text
22	Master Proposal ID	ID of the master proposal associated with the activity.	string/text
23	School/Unit Description	The school/unit associated with the proposal, if applicable (i.e. School of Business, Athletics, etc.)	string/text
24	School/Unit Code		string/text
25	Project of Interest Description	The project that the call report is associated with or was made in support of	string/text
26	Project of Interest Code		string/text
27	Goals & Strategy for Contact	Free Text (255 Character Limit)	string/text
28	Primary Officer Indicator		Yes or No
29	Primary Entity Indicator		Yes or No
30	Outcome		string/text
31	No Follow-up Reason	The reason if no follow-up is needed.	string/text
32	Follow-up Comment		string/text
33	Outcome Code		string/text

File 3: Proposals **(new fields added)**

This file contains all proposals entered by your users in the Reeher Platform.

Number	Name	Description	Format
1	Proposal ID	Unique reference ID of the proposal.	string/text
2	Creator	The user who created the proposal.	string/text
3	Creator ID	ID of the user who created the proposal.	string/text
4	Created Date	Date the proposal was created.	MM/dd/yyyy HH:mm:ss
5	Modifier	The user who last modified the proposal.	string/text
6	Modifier ID	ID of the user who last modified the proposal.	string/text
7	Modified Date	The date the proposal was last modified.	MM/dd/yyyy HH:mm:ss
8	Proposal Name	Free Text (150 Character Limit)	string/text
9	Prospect ID		string/text
10	Proposal Type Description	i.e. Program Support, Scholarships, Unrestricted, Endowment	string/text
11	Proposal Type Code		string/text
12	Proposal Status Description	i.e. In Development, Pending, Approved, Declined	string/text
13	Proposal Status Code		string/text
14	Ask Amount	Amount originally requested	numeric value
15	Granted Amount	Actual amount committed	numeric value
16	Granted Date	Date the proposal was approved/granted	MM/dd/yyyy
17	Target Amount	Target amount of future ask	numeric value
18	Target Ask Date	Future date the ask will be made	MM/dd/yyyy
19	Ask Date	Actual date of solicitation that relates to the ask amount	MM/dd/yyyy
20	Expected Amount	Amount of the proposal that is expected to be granted/committed	numeric value
21	Expected Date	Future date the proposal is expected to close	MM/dd/yyyy
22	Proposal Stage	Current stage that the proposal is in within the proposal development cycle	string/text
23	School/Unit Description	The school/unit associated with the proposal, if applicable (i.e. School of Business, Athletics, etc.)	string/text
24	School/Unit Code		string/text
25	Project of Interest Description	The project that the proposal is associated with or was made in support of	string/text
26	Project of Interest Code		string/text
27	Comments	Free Text (500 Character Limit)	string/text
28	Active Indicator		Yes or No
29	Proposal Funding Type Description		string/text
30	Proposal Funding Type Code		string/text

