# REEHER PLATFORM
## DATA REQUEST GUIDE
### VERSION 2017.3

*(CHANGES FROM PREVIOUS DATA REQUEST GUIDE VERSION 6.0)*

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Reeher LLC

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## Overview

The Reeher Platform's Data Request Guide is designed to provide you with guidelines for setting up your institution's nightly data feed. We understand that your institution may not track all requested fields, or may track some information differently than outlined in this document. Please contact Reeher Support if you would like to discuss alternative methods for extracting the data.

### Automated Nightly File Transfer

As part of setting up the Reeher Platform, a nightly data feed will be set up to supply the application with up-to-date fundraising information from your institution's donor management system(s). This process involves two steps.

1. The nightly extract is set up by creating a number of queries or exports to pull the information into text files from your institution's system. This includes exporting the full files each night, and not only updates.
2. These files will be scheduled to automatically transfer to Reeher's server via SFTP (Secure File Transfer Protocol) each night. Typically, files are transferred between 10 pm and 1 am central time. You just need to provide the IP address of the machine that will transfer the files, and Reeher will provide a username and password for you to access your institution's folder on the server. Reeher also supports the use of SSH keys, or public keys, as a means of authentication for the SFTP.

This process is straightforward and our Customer Care team will help to establish this process if you do not have something currently in place.

### File Format

Reeher requests that each file be prepared in a tab delimited text file. Comma separated values (csv) format is also acceptable. All files should include column headers. If you are using the csv format, use double quote enclosures for any fields containing commas.

### Naming Conventions

Please title the files with the appropriate name corresponding to this document. For example, the entity file should be named "Entity" and should not include a date stamp or other information that would change the naming of the file on a daily basis. If splitting a file into multiple files, please name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, etc.).

### File Priorities in Implementation

During an institution's initial implementation of the Reeher Platform, to best organize the work and manage the timeline, the data files found in this Data Request Guide are broken down by the following priority groups. The Priority 1 Files will help Reeher with validating your dollar and donor counts along with looking at all of your constituents and identifying those who will receive Reeher predictive scores. This will also give you time to work on the remaining Priority 2 and 3 files while we continue with the implementation project.

### Files by priority group:

| Priority 1 Files | Priority 2 Files | Priority 3 files |
|---|---|---|
| File 1.1: Entity | File 3.1a: Activity History | File 1.2b: Email Addresses |
| File 2.1: Donor Transaction History | File 3.2: Staff Information | File 1.5b: Giving Societies |
| File 1.2a: Addresses | File 3.3: Prospect Entity | File 1.7: Athletics |
| File 1.3: Degrees | File 3.4: Prospect Status | File 1.8: Associated Entities |
| File 1.4: Relationship Type | File 3.5: Assignment History | File 2.2: Appeals |
| File 1.5a: Participation History | File 3.1b: Activity Details | File 2.3: Appeal Entity |
| File 1.6: Contact Restrictions | | File 3.6: Proposal |
| File 4.1: Code Translation Table | | File 3.7: Proposal Assignment |
| | | File 4.2: Customer Specific Codes |

## File 1.1: Entity *(new field added)*

All relationships that are tracked in your system should be provided in the Entity file regardless of relationship type, relationship status, or whether or not you solicit them.

Each individual entity should appear in only one row within the file.

| Number | Name | Description | Preferred Format |
|---|---|---|---|
| 1 | Entity ID | Unique ID of the entity | string/text |
| 2 | First Name | Entity's first name if person, or organization name if non-person | string/text |
| 3 | Middle Name | | string/text |
| 4 | Last Name | | string/text |
| 5 | Preferred Email | | string/text |
| 6 | Birth Date | | MM/dd/yyyy |
| 7 | Marital Status* | | string/text |
| 8 | Nickname | | string/text |
| 9 | Prefix | i.e. Mr., Mrs., Dr., etc. | string/text |
| 10 | Suffix | i.e. M.D., Ph.D., etc. | string/text |
| 11 | Preferred Mailing Name | Preferred mailing address name of the individual entity | string/text |
| 12 | Job Title | | string/text |
| 13 | Employer | | string/text |
| 14 | Relationship Status* | i.e. active, inactive, deceased, lost, etc. | string/text |
| 15 | Primary Relationship Type* | i.e. alumni, friend, parent, etc. | string/text |
| 16 | Preferred Class Year | | yyyy |
| 17 | Gender* | | string/text |
| 18 | Spouse Name | Spouse's full name including any Prefix and/or Suffix | string/text |
| 19 | Spouse ID | Spouse's entity ID | string/text |
| 20 | Married Alumni Indicator | Indicator that entity's spouse is an alumnus/a | 1=Yes, 0=No |
| 21 | Maiden Name | Maiden Name of the Entity | string/text |
| 22 | Ethnicity* | | string/text |
| 23 | Occupation* | i.e. Educator, Administrative Support, Attorney/Counsel | string/text |
| 24 | Industry* | i.e. Manufacturing, Finance, Education | string/text |
| 25 | Mobile Phone | | string/text |
| 26 | Preferred Joint Mailing Name | Preferred household mailing address name | string/text |
| 27 | Primary Entity ID | Entity ID of the primary entity between the entity and the spouse. If not available, Reeher will use lowest Entity ID between the entity's Entity ID and the Spouse ID as Primary Entity ID. | string/text |
| 28 | Annual Fund Ask Amount* | The amount that an entity is rated for the Annual Fund as an Annual Fund Ask Amount (if available) | string/text |
| 29 | Planned Giving Indicator | Indicates that the constituent has a planned gift | 1=Yes, 0=No |

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

## File 1.2a: Addresses *(updated file reference number)*

The Addresses file provides all active addresses for each constituent, and identifies which address is their primary home, which address is their primary business, and which address is their preferred. Only valid addresses should be included in the file (do not include previous addresses or invalid addresses).

The file can contain multiple rows per entity for each active address associated with the entity.

| Number | Name | Description | Preferred Format |
|---|---|---|---|
| 1 | Entity ID | ID that corresponds with the Entity ID in the Entity file | string/text |
| 2 | Address Line 1 | | string/text |
| 3 | Address Line 2 | | string/text |
| 4 | Address Line 3 | | string/text |
| 5 | City | | string/text |
| 6 | State | | string/text |
| 7 | Zip Code | Zip Code (with Zip+4, if available, for the entity's address (i.e. 91234-8765)) | string/text |
| 8 | Country | | string/text |
| 9 | Phone | The phone number associated with the address (if applicable) | string/text |
| 10 | Address Type* | i.e. Home, Business, Seasonal, etc. | string/text |
| 11 | Primary Home Indicator | Indicates the address is the entity's primary home address. A maximum of one address per entity should be indicated as primary home. The indicated address will show up in the constituent's Relationship Profile as their primary home address. | 1=Yes, 0=No |
| 12 | Primary Business Indicator | Indicates the address is the entity's primary business address. A maximum of one address per entity should be indicated as primary business. The indicated address will show up in the constituent's Relationship Profile as their primary business address. | 1=Yes, 0=No |
| 13 | Preferred Indicator | Indicates the address is the entity's preferred address. A maximum of one address per entity should be indicated as preferred. The indicated address will show up in the Platform as the constituent's preferred address. | 1=Yes, 0=No |

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

## File 1.2b: Email Addresses *(new file)*

The Email Addresses file provides all active email addresses for each constituent

The file can contain multiple rows per entity for each email address associated with the entity.

| Number | Name | Description | Preferred Format |
|---|---|---|---|
| 1 | Entity ID | ID that corresponds with the Entity ID in the Entity file | string/text |
| 2 | Email Type* | i.e. personal, business etc. | string/text |
| 3 | Email Address | | string/text |

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

# File 1.5a: Participation History *(updated file reference number)*

The Participation History file contains all categories of entity involvement with your institution. Examples would include committees, events, volunteering, traveling, undergraduate activities if available, Greek organizations, alumni associations, intramural athletics, boards, etc.

The file should contain multiple rows per entity corresponding to each participation activity of the entity.

| Number | Name | Description | Preferred Format |
|---|---|---|---|
| 1 | Entity ID | ID that corresponds with the Entity ID in the Entity file | string/text |
| 2 | Participation Category* | i.e. Event, Committee, Clubs, Volunteer, etc. | string/text |
| 3 | Activity Name* | i.e. President's Dinner, Alumni Association Committee, | string/text |
| 4 | Activity Role* | i.e. Chair, Attendee, President, etc. | string/text |
| 5 | Activity Status* | i.e. Active, Inactive, Current, Former, etc. | string/text |
| 6 | Start Date | Date the activity started | MM/dd/yyyy |
| 7 | Stop Date | Date the activity ended | MM/dd/yyyy |

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

## File 1.5b: Giving Societies *(new file)*

The Giving Societies file provides all giving society codes and details.

The file should contain a row for each giving society that relates to an entity record.

| Number | Name | Description | Preferred Format |
|---|---|---|---|
| 1 | Entity ID | ID that corresponds with the Entity ID in the Entity file | string/text |
| 2 | Giving Society Name* | | string/text |
| 3 | Giving Society Category* | | string/text |
| 4 | Active Indicator | Indicates that the entity is actively in the giving society | 1=Yes, 0=No |
| 5 | Start Date | Date that entity joined the giving society | MM/dd/yyyy |
| 6 | Stop Date | Date that entity joined left giving society | MM/dd/yyyy |

The * indicates codes are preferred and should be included in the code translation file