REEHER PLATFORM
DATA REQUEST GUIDE
VERSION 2017.4

(CHANGES FROM PREVIOUS DATA REQUEST GUIDE VERSION 2017.3)

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

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 4.3: Social Media Links

File 3.1a: Activity History *(updated field name- used to be "Campaign Code*")*

The Activity History file provides the contacts and other activities recorded by all staff at the institution.

The file can contain multiple rows per activity for each constituent and staff involved in the activity. If an activity has multiple staff or entities associated with it, the same Activity ID should be used on each row to link all staff and entities involved in the activity. Each activity should only have one Primary Entity indicated and only one Primary Officer indicated.

Number	Name	Description	Preferred Format
1	Activity ID	Unique ID for the activity	string/text
2	Entity ID	ID of the entity associated with the activity, which corresponds with the Entity file	string/text
3	Staff ID	Staff ID which corresponds with the Staff Information file	string/text
4	Activity Type*	i.e. phone, email, letter, visit, etc.	string/text
5	Activity Date		MM/dd/yyyy
6	Activity Purpose*	i.e. ask, stewardship, etc.	string/text
7	Measured Indicator	Indicates the activity/contact helped advance the cultivation process beyond simple notes and casual conversations	1=Yes, 0=No
8	Proposal ID	Unique ID for the proposal related to the activity, if a proposal is linked to the activity	string/text
9	School/Unit*	The school/unit associated with the activity, if applicable (i.e. School of Business, Library, Athletics, etc.)	string/text
10	Project of Interest Code*	The project that the activity is associated with or was made in support of	string/text
11	Primary Entity Indicator	Indicates that the entity associated with the activity is the primary person contacted, especially if the activity has multiple entities associated with it.	1=Yes, 0=No
12	Primary Officer Indicator	Indicates that the staff member associated with the activity is the primary staff member for the activity, especially if the activity has multiple staff associated with it.	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 3.6: Proposal *(updated field name "Project of Interest Code"- used to be "Campaign Code*", new field added)*

The Proposal file contains the relevant information that relates proposals to Prospect IDs.

The file should contain multiple rows per Prospect ID for each proposal related to that prospect.

Number	Name	Description	Preferred Format
1	Proposal ID	Unique ID for the proposal	string/text
2	Proposal Name		string/text
3	Prospect ID		string/text
4	Proposal Type*	i.e. Program Support, Scholarships, Unrestricted, Endowment	string/text
5	Proposal Status*	i.e. In Development, Pending, Approved, Declined	string/text
6	Ask Amount	Amount originally requested	numeric value
7	Granted Amount	Actual amount committed	numeric value
8	Active Indicator	Indicates the proposal is active	1=Yes, 0=No
9	Start Date	Date that the proposal was created	MM/dd/yyyy
10	Stop Date	For declined proposals this is the date the proposal was declined (should be included on all inactive proposals)	MM/dd/yyyy
11	Granted Date	Date the proposal was approved/granted (should be included on all approved/granted proposals)	MM/dd/yyyy
12	Target Amount	Target amount of future ask	numeric value
13	Target Ask Date	Future date the ask will be made	MM/dd/yyyy
14	Ask Date	Actual date of solicitation that relates to the ask amount	MM/dd/yyyy
15	Expected Amount	Amount of the proposal that is expected to be granted/committed	numeric value
16	Expected Date	Future date the proposal is expected to close	MM/dd/yyyy
17	Proposal Stage*	Current stage that the proposal is in within the proposal development cycle, if applicable (typically found in Advance databases only)	string/text
18	School/Unit*	The school/unit associated with the proposal, if applicable (i.e. School of Business, Library, Athletics, etc.)	string/text
19	Project of Interest Code*	The project that the proposal is associated with or was made in support of	string/text
20	Proposal Funding Type*	Indicates the gift type funding the proposal	string/text

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

File 4.3: Social Media Links *(new file)*

The Social Media Links file is an optional file; it provides links to social media sites (Facebook, Twitter, and LinkedIn) for each constituent.

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

Number	Name	Description	Preferred Format
1	Entity ID		string/text
2	Facebook	Full link to this social media site formatted as http://...	string/text
3	Twitter	Full link to this social media site formatted as http://...	string/text
4	LinkedIn	Full link to this social media site formatted as http://...	string/text