REEHER PLATFORM
DATA FEED
IMPLEMENTATION GUIDE
VERSION 4.0

Who: TOMS

PCODDY: SLT, ATN, AF, MAF, WEX

ACTIVE EMPLOYEES
BOARDS BOT, FNDERS
MUAABORD
FA, FF (FAC. STAFF) - That are not alumni
PRES PRODESSE CLUBS
NO ADDRESS/ NO PHONE AVAILABLE? send blank

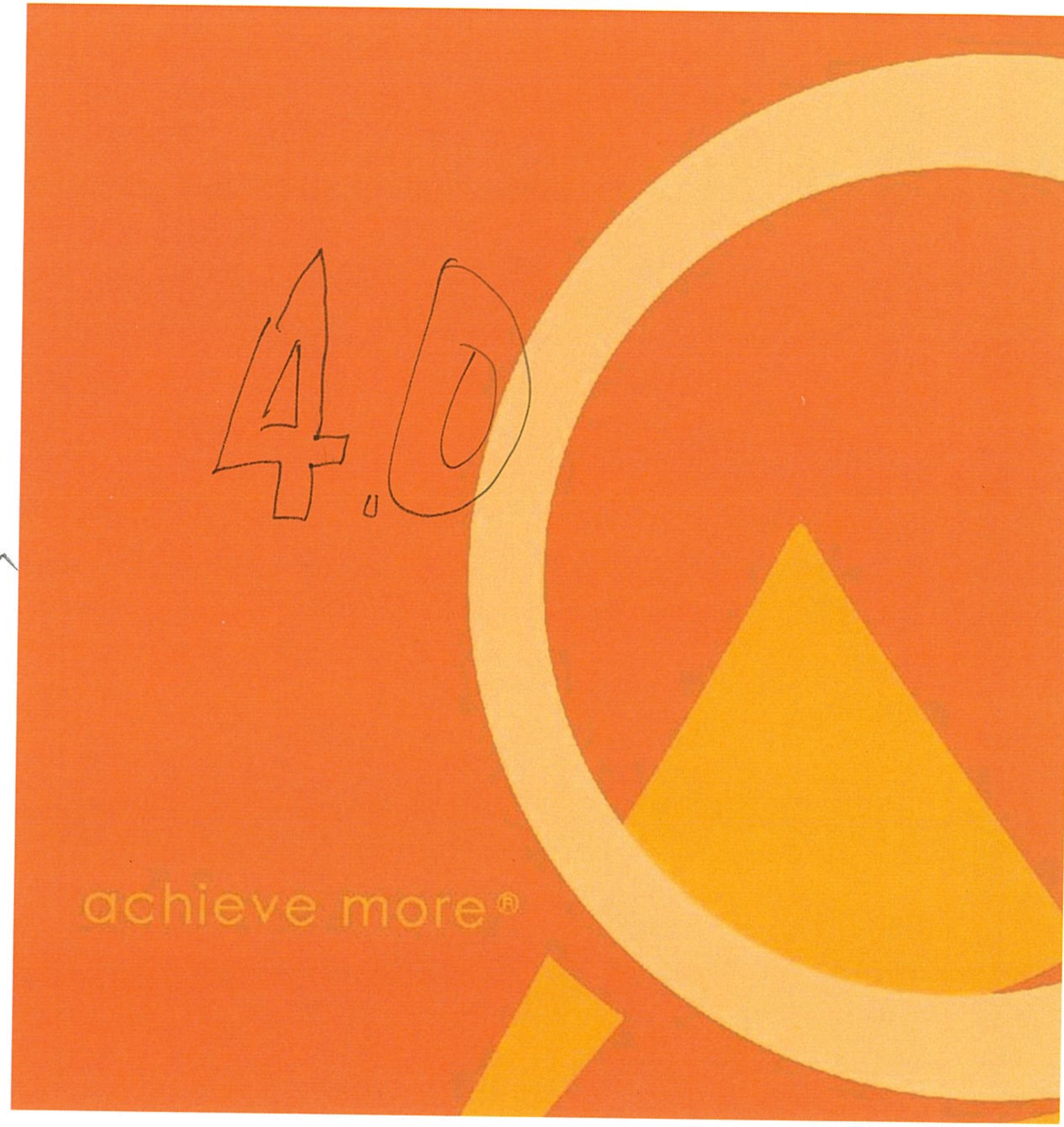
SENIORS
PARENTS PARENTS OF STU PARENTS OF ALUM
WESTERN

EXCLUSIONS?

SL0013: SPOUSE HANDLING (APPLY EXCL. TO SPOUSE)

CLASS AGENTS
REUNION COMMITTEE

EMAIL
MANAGED
Pledges



Reeher LLC

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Setting up the Data Feed

11 pm 1 am

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. First, the nightly dump of data is set up by creating a number of queries to pull the information into text files from your institution's system. Then 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. Once you have provided the IP address of the machine that will be loading the files, Reeher will provide you with a username and password to access your institution's folder on the server. This process is straightforward and our development team will help to establish this process if you do not have something currently in place.

BAD TIMING.

The remainder of this document focuses on defining the data files requested to implement the Reeher Platform.

Data Feed File Request Instructions

The following section outlines the types of tables and information we are specifically requesting for Reeher Platform implementation. This section describes the type of information requested, a brief description of the file; and a template of the fields, codes, and formats.

We request that each file be prepared in a tab delimited text format (CSV is also acceptable). When sending your files, please title the files with the appropriate number corresponding to the files discussed throughout this document. For example, the entity file should be named "1_Entity" and should not include a data stamp or other information that would change the naming of the file from a day to day basis. If multiple files are necessary to provide in order for us to compile then please name the files by including the file number and an alpha character (i.e. 3a_PledgeTransactions, 3b_GiftTransactions, etc.).

The following section outlines our preferred format and describes the data we need to complete implementation. All fields are not required. In addition, we realize your institution may not track all of the fields in each file or tracks some of this information in a different way than the described format and layout. Please contact us if that is the case and we can discuss the alternative method for extracting the data.

File Summary for Platform Configuration

The number of files requested is dependent on the type of implementation (e.g. Annual Fund, Major Giving, or Both). The following table illustrates which files are needed for the different types of implementations.

File #	File Name	Annual Fund	Major Giving	Both
1	Entity	X ✓	X	X
2	Athletics	X ✓	X	X
3	Donor Transaction History	X ✓	X	X
4	School/Degree	X ✓	X	X
5	Contact Information	X ✓	X	X
6	Relationship Type	X ✓	X	X
7	Participation History	X ✓	X	X
8	Officer Contact History		X	X
9	Gift Officer Information	X ✓	X	X
10	Prospect Entity		X	X
11	Prospect Status		X	X
12	Assignment History		X	X
13	Proposal		X	X
14	Proposal Assignment		X	X
15	Customer Specific Codes	X ✓	X	X
16	Appeals	X 0		X
17	Appeal Entity	X ✓		X
18	Contact Restrictions	X ✓	X	X
19	Code Translation	X ✓	X	X

File 1: Entity

In this file you should provide all relationships that are tracked in your system.

Each individual entity should appear in only one row within the file. The following layout defines the fields, column names, and requested format of the information.

code tors

☐ Anumber.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id ANUMBER	numeric value	Version 1
2	First Name	first name of entity	string/text	Version 1
3	Middle Name	middle name of entity	string/text	Version 1
4	Last Name	last name of entity	string/text	Version 1
5	Preferred Email SOP	preferred e-mail address NA MAE!	string/text	Version 1
6	Birth Date	date of birth of entity	(mm/dd/yyyy)	Version 1
7	Marital Status*	marital status Married? Single? Divorced?	string/text	Version 1
8	Nickname APANAM	nickname of the entity	string/text	Version 1
9	Prefix	personal prefix (i.e. Mr., Mrs., Dr., etc.)	string/text	Version 1
10	Suffix	personal suffix (i.e. M.D., Ph.D., etc)	string/text	Version 1
11	Preferred Mailing Name	preferred household mailing address name ~~Single~~ Combined?	string/text	Version 1
12	Job Title current status	job title → could be huge issue	string/text	Version 1
13	Employer	employer	string/text	Version 1
14	Relationship Status*	status of entity record (i.e. active, deceased, lost, etc.)? No mailing addr.	string/text	Version 1
15	Primary Relationship Type*	primary relationship type (i.e.. alumni, friend, parent, etc.) DONOR CAT	string/text	Version 1
ANUMBER 16	Primary Gift Officer Assigned	primary assigned gift officer id (this should be the same as the gift officer's entity id)	numeric value	Version 1
17	Preferred Class Year	preferred class year	yyyy	Version 1
18	Gender*	entity gender	string/text	Version 1
19	Spouse Name	full name of spouse L. FIRST MIDDLE LAST?	string/text	Version 1
20	Spouse ID	spouse's entity id ANUM	string/text	Version 1
21	Married Alumni Indicator*	indicator that entity is married to alumni Merger? ACCUSITION	numeric value	Version 1
22	Spouse Prefix	spouse personal prefix (i.e. Mr., Mrs., Dr., etc.)	1=Yes, 0=No	Version 1
23	Spouse Suffix	spouse personal suffix (i.e. M.D., Ph.D., etc)	string/text	Version 1
24	Maiden Name	maiden name of entity	string/text	Version 1
25	Household ID	id that groups constituent records to the same household	string/text	Version 2
			numeric value	Version 4

NA

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

ANUM1 + ANUM2? ase spouse view q2vcons

"2" - Pure merger

single item → not perfect. we have multiple OK

File 2: Athletics

The athletics file is designed to collect participation in student athletic information for each of the entity records that were provided in the Entity file. This should include all dates available.

The file should contain multiple rows per entity corresponding to the number and type of athletics activities that entity participated in and when they participated. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	Athletics Activity*	athletics or sports code entity participated in	string/text	Version 1
Jul 1 3	Start Date	date the entity started participating	mm/dd/yyyy	Version 1
Jun 30 4	Stop Date	date the entity stopped participating	mm/dd/yyyy	Version 1

Regional?

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

include ~~[illegible]~~ regional

sports undergrads

sports + regional

File 3: Donor Transaction History

The Transaction History file should contain the donation history of your institution for all dates available.

The file should contain multiple rows per entity corresponding to each transaction they are associated with. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
gift pledge # 1	Transaction ID	unique ID of this transaction - may have more than one row in this if more than one associated donor/entity	numeric value	Version 1
2	Entity ID	entity id	numeric value	Version 1
3	Legal Amount	legal amount of transaction	numeric value	Version 1
4	Credit Amount	credit amount of transaction	numeric value	Version 1
5	Transaction Date	date of transaction	mm/dd/yyyy	Version 1
6	Transaction Type Code*	pledge, ~~telephoned pledge~~, outright gift, pledge payment, matching Gift, etc.	string/text	Version 1
7	Pledge Amount Paid	amount paid on pledge SOLICITATION CODE	numeric value	Version 1
8	Appeal Code	appeal code that ties to specific appeal (like a direct mail piece or call center)	numeric value	Version 1
CAL YEAR 9	Fiscal Year	fiscal year the transaction occurred in FY CALC OR CALENDAR	yyyy	Version 1
10	Annual Fund Indicator*	indicates transaction associated with annual fund How RAF	1=Yes, 0=No	Version 1
11	Campaign Code*	code of the campaign the transaction is associated with	string/text	Version 2
12	Cash Indicator*	indicates if the transaction is considered a cash transaction ? ? ? ? ? ? ?	1=Yes, 0=No	Version 1
See Sample 13	every thing but Pledge Payment Commitment Indicator*	indicates if the transaction is considered a commitment (i.e. gifts + pledge transaction types) Campain ending	1=Yes, 0=No	Version 1
14	Pledge Payment Indicator*	indicates if the transaction is considered a pledge payment '1' or 'Ø'	1=Yes, 0=No	Version 1
15	Designation Code*	code of where the transaction was allocated to	string/text	Version 1
C Attribut 16	Designation School/Unit*	code of the school or unit associated with the designation/allocation	string/text	Version 1
P Attribut 17	Designation Purpose*	code of the designation purpose	string/text	Version 1
18	Pledge Indicator*	indicates transaction is considered a pledge transaction '1' or 'Ø'	1=Yes, 0=No	Version 2

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

is there pledge payment in TPP

Spouse

Rule Clas # CA, CR, etc.

pledge payment is gift w/a pledge #

Donor Transaction History File Examples:

The examples below do not show all required data columns. Name is not a requested column and is included for illustration only.

Pledge no.

#Gift

Example 1: John Smith makes a Pledge of $1,000 to the annual fund on July 12, 2010. On December 31, 2010 John pays $500 of the pledge. John's wife, Sally, is also credited with the transactions.

Transaction ID	Entity ID	Name	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Fiscal Year	Annual Fund Indicator	Cash Indicator	Commitment Indicator
11111	12345	John Smith	1000	1000	7/12/2010	Pledge	2011	1	0	1
11111	67890	Sally Smith	0	1000	7/12/2010	Pledge	2011	1	0	1
22222	12345	John Smith	500	500	12/31/2010	Pledge Payment	2011	1	1	0
22222	67890	Sally Smith	0	500	12/31/2010	Pledge Payment	2011	1	1	0

Example 2: The Smith Foundation gives $5,000 to the Smith Scholarship Fund. John and Sally Smith are the individuals associated with the foundation.

Transaction ID	Entity ID	Name	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Fiscal Year	Annual Fund Indicator	Cash Indicator	Commitment Indicator
33333	10001	Smith Foundation	5000	5000	8/19/2010	Gift	2011	0	1	1
33333	12345	John Smith	0	5000	8/19/2010	Gift	2011	0	1	1
33333	67890	Sally Smith	0	5000	8/19/2010	Gift	2011	0	1	1

Example 3: Adam Smith makes an annual fund gift of $300. Coca-Cola provides a matching gift of $300.

Transaction ID	Entity ID	Name	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Fiscal Year	Annual Fund Indicator	Cash Indicator	Commitment Indicator
44444	83838	Adam Smith	300	300	6/23/2010	Gift	2010	1	1	1
44444	50005	Coca-Cola	300	300	6/23/2010	Matching Gift	2010	1	1	1
44444	83838	Adam Smith	0	300	6/23/2010	Matching Gift	2010	1	1	1

100% credit for both

① Annual fund + cash indicator

② Cash Indicator for rating/research

Commitments

File 4: School/Degree

The School/Degree file should contain all of the school and degree of graduation information relating to the entity records. School of Graduation should only include schools or departments within your university or college.

The file should contain multiple rows per entity corresponding to each degree they are associated with. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	School of Graduation*	school code of graduation	string/text	Version 1
3	Degree Year	degree year	yyyy	Version 1
4	Degree of Graduation*	degree code of graduation	string/text	Version 1
5	Major*	major code of graduation	string/text	Version 1

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

School/Degree File Examples:

Example 1:

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
12345	School of Arts and Sciences	1989	Bachelor of Arts	English
12345	School of Social Sciences	1989	Bachelor of Sciences	Economics

Example 2:

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
67890	School of Arts and Sciences	1989	Bachelor of Arts	Philosophy
67890	School of Arts and Sciences	1993	Masters	Philosophy
67890	School of Arts and Sciences	1997	P.H.D.	Philosophy

File 5: Contact Information

The Contact Information file is meant to identify the different pieces of contact information you may have on each record at home or at their place of work.

AI MA

The file should contain multiple rows per entity corresponding to primary business or primary home contact record you have on the individual. Please only include the record's primary home address and primary business address if available. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	Address Line 1	address 1	string/text	Version 1
3	Address Line 2	address 2	string/text	Version 1
4	Address Line 3	address 3	string/text	Version 1
5	City	city	string/text	Version 1
6	State	state	string/text	Version 1
7	Zip	5 digit zip code	string/text	Version 1
8	Country	country	string/text	Version 1
9	Phone	phone	string/text	Version 1
10	Email	e-mail	string/text	Version 1
11	Address Type*	type of address (i.e. home or business)	string/text	Version 1
12	Preferred Indicator*	indicator of which of multiple address is preferred	1=Yes, 0=No	Version 1

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

FOR MA → GET PHONE – IF NO PHONE POSSIBLE USE CELL?

FOR AI → GET email of some kind if no BURKE (ALUMNI WORK email)

Contact Information File Examples:

Example 1: The constituent has a primary home address and a primary business address on record. Their home address is their preferred method of contact.

Entity ID	Address Line 1	Address Line 2	Address Line 3	City	State	Zip	Country	Phone	Email	Address Type	Preferred Indicator
12345	24 W Main St	Apt 2		Anytown	MN	56789	USA	(123) 456-7890	example1@gmail.com	Home	1
12345	16 E 7th St	Suite 789		Anytown	MN	56788	USA		example1@myjob.com	Business	0

Example 2: The constituent has a primary home address and a primary business address on record. Their business is their preferred method of contact.

Entity ID	Address Line 1	Address Line 2	Address Line 3	City	State	Zip	Country	Phone	Email	Address Type	Preferred Indicator
67890	67 Park Ave			Nowhere	MN	55088	USA	(123) 789-1234		Home	0
67890	828 Park Pl	Suite 484		Nowhere	MN	55099	USA	(123) 494-7892	example2@myjob.com	Business	1

Example 3: The constituent only has a primary home address on record. This is their preffered method of contact.

Entity ID	Address Line 1	Address Line 2	Address Line 3	City	State	Zip	Country	Phone	Email	Address Type	Preferred Indicator
56565	585 Lake St			Somewhere	MN	51873	USA	(123) 789-1234	example3@hotmail.com	Home	1

Example 4: The constituent only has a primary business address on record. This is their preferred method of contact.

Entity ID	Address Line 1	Address Line 2	Address Line 3	City	State	Zip	Country	Phone	Email	Address Type	Preferred Indicator
38744	212 River Rd			Mytown	MN	54989	USA	(123) 789-1234	example4@aol.com	Business	1

File 6: Relationship Type Donor Category

The Relationship Type file should contain all of the various types of relationship types that the entity may be have with your institution.

The file should contain multiple rows per entity corresponding to each relationship type related to the entity. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	Relationship Type*	relationship type (i.e.. alumni, friend, parent, etc.)	string/text	Version 1

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

KARA SAYS THE CAN REUSE WHAT IS FOR PREF DONOR CATEGORY SO NO NEED TO SEND THE CODES IN THE TRANSLATION FILE A SECOND TIME.

File 7: Participation History Activity

The Participation History file should contain all categories of entity involvement with your institution through committees, volunteering, traveling, etc.

The file should contain multiple rows per entity corresponding to each activity the entity participated in. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	Participation Category*	category of interaction (i.e. committee, volunteer, travel, etc.)	string/text	Version 1
3	Activity Name*	name code	string/text	Version 1
4	Activity Role*	role code	string/text	Version 1
5	Activity Status*	status code ~~category~~ ? "A" and "I"	string/text	Version 1
JUL 1 6	Start Date	start date of committee participation	mm/dd/yyyy	Version 1
JUN 30 7	Stop Date	stop date of committee participation	mm/dd/yyyy	Version 1

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

whats min/old Use

Use UNGRD ALUMN } CATEGORY

NO SPORTS

except tickets

sports excluded

Greek

File 15: Customer Specific Codes

The Customer Specific Code file should contain any additional scores or values your institution would like to include. For instance, perhaps you have created an internal scoring system or have previously had wealth screening done on some of your prospects. Please provide any scores in the following format if you would like those included. We request that you limit the number of different types of scores to five.

The file should contain multiple rows for each entity id for each score related to that record. The following layout defines the fields, column names, and the requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	entityid	entity id	numeric value	Version 1
2	value name	name of the value	string/text	Version 1
3	score*	value or indicator	string/text	Version 1
4	append date	date the score was appended to the entity record	mm/dd/yyyy	Version 1

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

Black baud or Prospect Screen

> All blackbaud "10" sort

"R"
> ~~Cb~~ ~~Capability Rating~~ Current 1-11 etc

"B" ~~Base Inclination~~ A to etc

All PRGR SOL CODES ARE SENT HERE

File 16: Appeals

The Appeals file should contain detailed information that ties back to the appeal codes in the Donor Transaction file. This file should contain one row for each appeal code. The following layout defines the fields, column names, and requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Appeal Code	unique code for appeal	string/text	Version 1
2	Appeal Type	code that indicates type of appeal (i.e. email, letter, phone, etc.)	string/text	Version 1
3	Program Code	code that categorizes the appeals related to annual fund, or other program/campaign	string/text	Version 1
4	Drop Date	drop date of appeal	mm/dd/yyyy	Version 1
5	Fiscal Year	fiscal year that the appeal is related to being initiated in	yyyy	Version 1
6	Start Date	start date of appeal	mm/dd/yyyy	Version 1
7	Stop Date	stop date of appeal	mm/dd/yyyy	Version 1
8	Number Solicited	number of records solicited	string/text	Version 1
9	Appeal Name	name of the appeal	string/text	Version 2
10	Appeal Cost	cost associated with the appeal	numeric value	Version 2

Troble Heare

on sck. schedule
not in banner

Not doing at This Time

File 18: Contact Restrictions

Exclusion codes

The Contact Restrictions file should provide us with all contact and/or solicitation restriction codes. The file should contain multiple rows for each restriction code that relates to an entity record. The following layout defines the fields, column names, and requested format of the information.

Number	Name	Description	Preferred Format	Version Added/Modified
1	Entity ID	entity id	numeric value	Version 1
2	Restriction Codes*	contact and solicitiation restrictions	string/text	Version 1

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

google doc Tim has on what is sent

File 19: Code Translation Table

The code translation table should be to define codes in any of the files your institution is providing. If you are not able to create some of the indicators requested, please provide us with the codes that we should use to translate in the preferred format variables in order for us to recode your institution's variables.

Below is an example of the desired fields and information that should be in this file. Please provide us with the file name of where the code is found, the descriptive name/field name of where the code is found, the code value, and the code definition.

If you need additional help recoding variables not found within this template then please expand the template you provide back to us using this format.

File Name	Field Name	Customer Codes	Customer Definitions
Entity	Marital Status	M	Married
Entity	Marital Status	S	Single
Entity	Marital Status	D	Divorced
Entity	Marital Status	W	Widowed
Entity	Marital Status	O	Other
Entity	Primary Relationship Type	AL	Alumni
Entity	Primary Relationship Type	PR	Parent
Entity	Primary Relationship Type	FR	Friend
Entity	Primary Relationship Type	FS	Faculty/Staff
Entity	Primary Relationship Type	TR	Trustee
Entity	Primary Relationship Type	OT	Other
Entity	Gender	M	Male
Entity	Gender	F	Female
Entity	Gender	O	Other

Reeher Data Feed Version Notes

Over the course of time additional files and or fields within a file will become available to add to the nightly data feed. These additions and/or changes to the files are based on the requests of customers or related to new product development. The following section reviews the changes and additions made to the nightly feed request in the most recent version.

Version 4: January 4, 2012

- Added Household ID to Entity file (File 1)
- Removed Donor Deceased flag from Donor Transaction History file (File 3)
- Added Ask Date to Proposal file (File 13)

Reeher LLC's software and analytics helps leading colleges and universities make the most of their resources and achieve breakthrough results.

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