SportsEye File Format Specification

V2 – NOVEMBER 2020

Active X change
Empowering data. Intelligent investment.

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Introduction

SportsEye is a business intelligence platform, empowering data to shape a more informed, connected and active sector.

We combine your own data with thousands of data points to produce trends, benchmarking and forecasts to help pinpoint priorities. Importantly, we ask you to provide the full residential address of your members such that we can combine this with other demographic data to build membership profiles.

To do this, we undertake a process known as 'geocoding' which converts a physical address to the longitude and latitude points on the globe. This allows us to locate each member within what is known as a 'mesh block' – a statistical area to which demographic data from the census and other sources can be attributed – effectively anonymising each member. As an example – as of 2016, there are 358,122 mesh blocks in Australia alone.

Importantly – we do NOT keep or store your members addresses or the associated geocoded latitude / longitude within our systems and they are discarded once we have attributed their location to a mesh block.

This process of geocoding is essential to the SportsEye platform – if your organisation is unable to supply raw address data for any reason – please speak to your account manager about options available to geocode these addresses yourselves prior to supplying your data files. Note that geocoding services incur a cost which we cover if we geocode this data on your behalf.

Taxonomy

As an industry we have several words / terms to describe aspects of belonging to a club / leisure center and the activities people might participate in. For clarity, here are the words ActiveXchange uses and their intended meaning.

Members   A **member** is a PERSON who is typically paying you to use services that you provide. We'll ask you for things like gender, date of birth and where they live (see above for why).

Memberships   A **membership** is the PRODUCT that a **member** is paying (typically) you for that entitles them to use or participate in services you offer.
e.g. Fortnightly Gym Membership, Annual Aquatics Membership, Football Victoria Membership 2020 Season.

Suspensions   A **suspension** is a period of time during which a **membership** is not able to be used.
e.g. A **member** might suspend their membership because they are going on holiday for a month.

Visits   A **visit** occurs when someone (this might be a **member** or it may be an anonymous visitor (**casual visit**)) uses your services but you cannot be certain what they did within your facility.
e.g. If you're a large leisure centre and have pools, spa, sauna, gym etc. which can be freely used without prior booking, you might know that a person has entered the facility but don't know necessarily what activity they partook in.

Participations A **participation** occurs when someone (this might be a **member** or it may be an anonymous visitor (casual use)) uses your services and you know the exact activity they partook in and can provide information about that activity.
e.g. a group exercise class, a spin session, a personal training session, a swimming lesson, a game of basketball etc.

Enrolments   An **enrolment** is a COURSE that a **member** is paying (typically) to participate in.
e.g. weekly swimming lessons, school holiday tennis programme etc.

Sites   A **site** is a physical location that you offer services at.
e.g. Acme Leisure Centre Sydney, Greenfield Sporting Oval

Facilities   A **facility** is a physical resource within a **site**.
e.g. swimming pool, gym, tennis court, cricket pitch, basketball court

Home Site   If you are a multi-**site** organisation – a home **site** refers to the **site** that a **member** uses most often.

Handling date/time

Date and time information can be stored within systems in several ways. For the purposes of supplying date/time information to ActiveXchange we require that all time information be provided in the LOCAL timezone of the site that the event occurred at.

This should not be a datetimeoffset or UTC time.

All dates and time information should be provided in ISO 8601 format (YYYY-MM-DDTHH:MM) **without** a UTC offset.

e.g. If it occurred at 11am in Melbourne on the 28th October 2020 – this would be **2020-10-28T11:00**

Conventions

The following conventions are used throughout the table descriptions below:

* An Asterix denotes a mandatory field

Identifier A field with this suffix refers to a unique identifier in YOUR systems. We support alpha-numeric identifiers up to 100 chars in length (ASCII only).

File Layout

The data must be provided in Microsoft Excel format with each extract appearing as a different worksheet within a single workbook. Each worksheet should be named the name of the extract – e.g. 'Members Extract'.

Example Excel templates for each of these files should have accompanied this document, please request these from your account manager if they have not been supplied.

Tip: If you're using Microsoft SQL Server Reporting Services to automate your extracts, you can produce a single Excel file with multiple worksheets use the method described here:

https://www.mssqltips.com/sqlservertip/3527/export-sql-server-reporting-services-report-data-into-multiple-excel-worksheets/

SportsEye Operator Data

As an operator of a leisure facility we want to look at the participation and engagement of your members. As such, our focus on data collection centres around your membership base, their visits to your facilities and the activities that they might participate in (e.g. Group exercise classes, swimming lessons etc.).

We have worked with software vendors to produce extract scripts for some of the most common Leisure Management Systems on the market today (Envibe, Plus2, Centaman, Links) and will be working with them even closer in 2021 to support direct integration in future. Please discuss the software platform you use with your account manager to see if we have an off-the-shelf set of extract scripts to get you started.

There are two 'types' of data we ask you to supply:

1. **Incremental** - data that is fixed in time and won't change in the future.
   This might be a 'visit' as registered by one of your turnstiles / access control devices when a member presented their membership card and gained access to your facility. In this instance, the data is fixed in time and this event won't ever change.

   Fixed in time data such as 'visits' can safely be provided to us as **incremental updates** – that is, each file you provide to us need only contain the new data since the last file you provided.

   For example, you may choose to provide a file once per month on the 1st of every month. Each month would therefore contain all the incremental updates of the previous month.

e.g. Data supplied on the 1st June 2020 would contain all the incremental updates since the last file you provided on the 1st May 2020 (e.g. 1st May 2020 – 31st May 2020 inclusive).

2. **Deltas / Full dump** – data that changes
   This might be information about a member (e.g. their address has changed) or a membership or enrolment they hold at your facility.

   For example, if you supplied a data file on 1st January 2020 that told us that John Smith had purchased an open-ended membership that had no end date (e.g. paying by Direct Debit) and on the 15th August 2020 he cancelled his membership, we need to know about this update to John Smith's membership information and not just the new memberships you've sold since you last supplied data.

   Note: As not all Leisure Management Systems can handle "change tracking" to allow you to easily identify records which have changed, you may supply ALL data and our warehousing system will identify and handle changes automatically.

   e.g. If you started providing ActiveXchange with data on 1st January 2019 and had chosen to supply updated data on the 1st of every month, then each data file you supply should contain all the data from the original file + every new record since.

   In this instance, if you've previously told us about a membership and it no longer appears in your data file, we will automatically treat this membership as having expired.

For each of the data sets below, please make note of the type of data we are requesting (Incremental vs Delta/Full Dump).

Members Extract
[DELTA/FULL DUMP]

The members extract should contain information on the PEOPLE who are paying (typically) to use your services. The corresponding member must exist in the members extract for each member referenced in other extracts.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this person
*HomeSiteIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the home site of this member. A home site is typically the site the member uses most often / originally registered at.
*HomeSiteName *(max 255 chars)*	The home site name
DateOfBirth	The date of birth of the member (We interpret 1900-01-01 as not having a valid date of birth if your source system uses this) Note: If you only know the AGE of a person and not their date of birth, please use the current date and subtract their age to give a

	rough approximation of their date of birth.
	e.g. Today is 21st October 2020. Age of the member is 41. Infer the date of birth as 21st October 1979.
*GenderInd	Please use one of the following values to indicate gender: • M = Male • F = Female • O = Other • U = Unknown
Address1 *(max 100 chars)*	Address details in your local hierarchy (e.g. Street address)
Address2 *(max 100 chars)*	(e.g. Locality name - Town / Suburb / City etc.)
Address3 *(max 100 chars)*	(e.g. State / Territory)
Postcode *(max 100 chars)*	
Country *(max 100 chars)*	(e.g. Australia, New Zealand etc.)
Latitude	If you have geocoded the member address yourself, please supply this in lieu of the full address.
Longitude	If you have geocoded the member address yourself, please supply this in lieu of the full address.

Memberships Extract
[DELTA/FULL DUMP]

The memberships extract should contain information about the PRODUCTS PEOPLE have purchased (typically) to use your services.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this membership sold to a member
*MemberIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the member this membership was sold to. Note: There must be a corresponding record in the members extract in this file with a matching Identifier
*MembershipTypeIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify this TYPE of membership.
*MembershipTypeName *(max 255 chars)*	This is the name of the membership type that the member has purchased. (e.g. Gold fortnightly, Silver monthly, Annual)
MembershipTypeDescription *(max 255 chars)*	The friendly description of this membership type (optional but helps with categorisation). (e.g. Our gold fortnightly membership gives you access to our Gym, Pool and Group Fitness programme).
*StartDateLocal	Date this membership starts in ISO 8601 format (YYYY-MM-DD)

EndDateLocal	Date this membership ends. (If this is a fixed term membership, or the membership has been terminated, leave blank for ongoing (recurring) memberships). ISO 8601 format (YYYY-MM-DD)

PeriodInd	Every time you collect a payment for this membership, what period of access does that cover:
	    0. Unknown
	    1. Entire membership paid upfront in one instalment
	    2. Recurring – Renews Daily
	    3. Recurring – Renews Weekly
	    4. Recurring – Renews Fortnightly
	    5. Recurring – Renews Monthly
	    6. Recurring – Renews every 3 months
	    7. Recurring – Renews every 6 months
	    8. Recurring – Renews annually
	    9. Recurring – Other period

CostPerPeriod	The cost of the membership per the period supplied in PeriodInd. (e.g. If you charge $40 every fortnight for this membership, then set PeriodInd = 3 and set CostPerPeriod = 40 – should not include currency symbol)
JoiningFeeCost	If the member paid a joining fee for purchasing this membership please include the amount here. (e.g. 100.00 – should not include currency symbol)

Suspensions Extract
[DELTA/FULL DUMP]

The suspensions table should contain information about the membership suspensions members have arranged with you.

Column	Description
*MemberIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the member this suspension applies to. Note: There must be a corresponding record in the members extract in this file with a matching Identifier Note: This column is to validate that the membership identifier you supply in the next column correlates correctly to a membership we already know about assigned to that member
*MembershipIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the membership sold to the member.
*SuspensionStartDateLocal	Date this suspension starts in ISO 8601 format (YYYY-MM-DD)
SuspensionEndDateLocal	Date this suspension ends in ISO 8601 format (YYYY-MM-DD) (Open ended suspensions are uncommon – however this field is not mandatory to support situations where this may occur).

Visits Extract
[INCREMENTAL]

The visits extract should contain information about VISITS to your sites where you don't have information about the activity that person did at the site.

e.g. A member of a leisure centre that has a café, swimming pool, gym etc. is able to enter the site by swiping their membership card at a turnstile / barrier. In this instance, you know they entered the site (a visit), but not what they did when they were inside.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this visit.
MemberIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the member this suspension applies to. Note: There must be a corresponding record in the members extract in this file with a matching Identifier. Note: This field is not mandatory and should be left blank in the case of 'Casual Visits'
*SiteIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the site this visit occurred at.
*SiteName (max 255 chars)	This is the name of the site this visit occurred at
*DateTimeEntryLocal	Date and time this visit occurred ISO 8601 format (YYYY-MM-DDTHH:MM:SS)
DateTimeExitLocal	Date and time this visit ended ISO 8601 format (YYYY-MM-DDTHH:MM:SS) Note: Some membership systems support exit barriers where customers swipe their card again on the way out to record the duration of entry. This is not mandatory.

Participations Extract
[INCREMENTAL]

The participations extract should contain information about PARTICIPATION in an activity at your sites.

e.g. A member of a leisure centre attended a Zumba Group Exercise class on Monday at 6pm. The class ran for 45 mins.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this participation. Note: This may be something like a booking reference etc.
MemberIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the member this suspension applies to.

	Note: There must be a corresponding record in the members extract in this file with a matching Identifier.
	Note: This field is not mandatory and should be left blank in the case of 'Casual Visits'
*SiteIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the site this visit occurred at.
*SiteName *(max 255 chars)*	This is the name of the site this visit occurred at
*DateTimeLocal	Date and time this participation occurred ISO 8601 format (YYYY-MM-DDTHH:MM:SS)
*SessionIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the session they took part in. Note: This may be something like a booking reference etc.
*SessionName *(max 255 chars)*	The name of this session (e.g. Zumba)
SessionDescription *(max 255 chars)*	The friendly description of this session (optional but helps with categorisation)
*SessionDurationInMins	Total duration of this session in minutes (e.g. 45)
*SessionMaximumCapacity	Maximum session capacity (e.g. if a Yoga class can only accommodate 10 people, then the maximum capacity is 10).

SportsEye Sports Data

As a sporting body, we want to know all about the members who are (typically) paying to participate in your sport, what club those members belong to and where possible the team(s) they play in.

In our model:

1. A sport is played by **teams** from **clubs**.
2. A **club** comprises of one or more **teams** (e.g. Male First, Male Second, Female First, Junior, Senior)
3. A **team** has a home ground (this is the location they play at / train at the most). Not all **teams** within a **club** may share the same home ground – so home ground is a property of the team and not the club. It is perfectly acceptable for all teams within a club to share a home ground – simply use the same address details.

Memberships Extract
[DELTA/FULL DUMP]

The memberships extract should contain information about your members and the membership type they hold with the sporting body. We are only interested in participating members (e.g. It's common within some sports to sell "Non Playing" memberships – please only include those who partake in physical activity).

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this membership sold to a member
*MemberIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the member this membership was sold to.
DateOfBirth	The date of birth of the member (We interpret 1900-01-01 as not having a valid date of birth if your source system uses this) Note: If you only know the AGE of a person and not their date of birth, please use the current date and subtract their age to give a rough approximation of their date of birth. e.g. Today is 21st October 2020. Age of the member is 41. Infer the date of birth as 21st October 1979.
*GenderInd	Please use one of the following values to indicate gender: • M = Male • F = Female • O = Other U = Unknown
Address1 *(max 100 chars)*	Address details in your local hierarchy (e.g. Street Address)
Address2 *(max 100 chars)*	(e.g. Locality name - Town / Suburb / City etc.)
Address3 *(max 100 chars)*	(e.g. State / Territory)
Postcode *(max 100 chars)*	
Country *(max 100 chars)*	(e.g. Australia, New Zealand)
Latitude	If you have geocoded the member address yourself, please supply this in lieu of the full address.
Longitude	If you have geocoded the member address yourself, please supply this in lieu of the full address.
*MembershipTypeIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify this TYPE of membership.
*MembershipTypeName *(max 255 chars)*	This is the name of the membership type that the member has purchased. (e.g. Annual Playing Member, Winter Season)
MembershipTypeDescription *(max 255 chars)*	The friendly description of this membership type (optional but helps with categorisation). (e.g. Winter Season members can only participate in indoor league games between June - August).
Classification	The class of membership (e.g. Junior, Senior, Casual)
*StartDateLocal	Date this membership starts in ISO 8601 format (YYYY-MM-DD)
EndDateLocal	Date this membership ends. (If this is a fixed term membership, or the membership has been terminated, leave blank for ongoing (recurring) memberships). ISO 8601 format (YYYY-MM-DD)

Clubs Extract

The clubs extract should contain information about all the clubs with active players.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this club
*Name (max 255 chars)	This is the name of the club e.g. Eltham Redbacks

Teams Extract

The teams extract should contain information about the teams that play for clubs.

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this team
*Name (max 255 chars)	This is the name of the team e.g. Male First, Male Second, Female First, Junior, Senior etc.
*HomeGroundIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the home ground site of this team
*HomeGroundName (max 255 chars)	The name of the home ground site
HomeGroundAddress1 (max 100 chars)	Address details in your local hierarchy (e.g. Street Address)
HomeGroundAddress2 (max 100 chars)	(e.g. Locality name - Town / Suburb / City etc.)
HomeGroundAddress3 (max 100 chars)	(e.g. State / Territory)
HomeGroundPostcode (max 100 chars)	
HomeGroundCountry (max 100 chars)	(e.g. Australia, New Zealand)
HomeGroundLatitude	If you have geocoded the address yourself, please supply this in lieu of the full address.
HomeGroundLongitude	If you have geocoded the address yourself, please supply this in lieu of the full address.

Enrolments Extract

The enrolment extract should contain information about members and the team(s) they are enrolled in. (note in some sports it's perfectly possible to be enrolled in multiple teams and sometimes even

clubs during the same membership period (e.g. An annual member in Team A during Winter Season and Team B during Summer Season).

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this members enrolment in this team. (Hint: If such an identifier doesn't exist – make up a computed identifier using a combination of the Membership Identifier and the Team Identifier)
*MembershipIdentifier	This is the UNIQUE identifier from the Membership Extract that identifies a member during a membership period.
*TeamIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the team this member is enrolled with.

SportsEye Course Enrolments

Currently we provide swim school operators with insights into their programmes performance and to do so we require enrolment data and information about their regular participation.

As this is an extension to SportsEye Operator, the 'Members Extract' definition from that section of this documentation is also required. Whilst your terminology may differ – for the purposes of this data definition – a 'member' is also someone who is enrolled in a course you offer.

In our model:

1. A **course** is the overarching name of activity a customer might be enrolled in.
   e.g. "Adult Learn To Swim", "Child Learn To Swim"

2. **Courses** have one or more **levels**. **Levels** are typical a reflection of competency or progression through a course.
   e.g. "Level 1", "Level 2", "Level 3", "Starfish", "Jellyfish", "Crab", "Octopus" etc.

3. **Levels** have one or more **lessons**. **Lessons** are the instances during a week when this **level** is taught. E.g. Monday 10am, Thursday 4pm, Saturday 8am.

4. **Regular Lesson** –typically a course enrolment is allocated a regular lesson day / time. Whilst they might skip regular lessons and take make-up sessions, for this extract we are only interested in their regular lesson weekday / time

Column	Description
*Identifier	This is the UNIQUE identifier in your system that will always uniquely identify this members enrolment in this course.
*MemberIdentifier	This is the UNIQUE identifier from the Members Extract that identifies a member.
*CourseIdentifier	This is the UNIQUE identifier for the **course** they are enrolled in (not to be confused with level)

*CourseName *(max 255 chars)*	This is the name of the course they are enrolled in
*LevelIdentifier	This is the UNIQUE identifier for the **level** they are enrolled in
*LevelName *(max 255 chars)*	This is the name of the level they are enrolled in
*StartDateLocal	Date this enrolment started in ISO 8601 format (YYYY-MM-DD)
EndDateLocal	Date this enrolment will end / ended. (If this is a fixed term enrolment, or the enrolment has been terminated, leave blank for ongoing (recurring) enrolments). ISO 8601 format (YYYY-MM-DD)
*RegularLessonIdentifier	This is the UNIQUE identifier for this lesson. Note if this doesn't exist in your system – please generate one as a concatenation of the Course Identifier, Lesson Identifier, Regular Lesson Day (below) and the time. e.g. a 100-10-5-11
*RegularLessonDayInd	The numeric representation of the regular weekday 1. Sunday 2. Monday 3. Tuesday 4. Wednesday 5. Thursday 6. Friday 7. Saturday
*RegularLessonTime	A numeric representation of the regular time in 24 hour notation e.g. 10am = 10:00, 2pm = 14:00
*RegularLessonDurationInMins	The duration of the lesson in minutes. e.g. 30
*RegularLessonMaxCapacity	The maximum number of enrolments in this lesson
*SiteIdentifier	This is the UNIQUE identifier in your system that will always uniquely identify the site of this enrolment.
*SiteName *(max 255 chars)*	This is the name of the site this enrolment is at
*EnrolmentTypeInd	The type of enrolment • 1 = Fixed *Customer pays upfront for the duration of the enrolment with a fixed start and end date.* • 2 = Continuous *Customer pays via Direct Debit instalments and is continuously enrolled on the course until they choose to terminate the enrolment or have completed the highest grading possible.*
PeriodInd	Every time you collect a payment for this enrolment, what period of enrolment does that cover: 0. Unknown 1. Entire enrolment paid upfront in one instalment 2. Recurring – Renews Daily 3. Recurring – Renews Weekly 4. Recurring – Renews Fortnightly 5. Recurring – Renews Monthly

	6. Recurring – Renews every 3 months 7. Recurring – Renews every 6 months 8. Recurring – Renews annually 9. Recurring – Other period
CostPerPeriod	The cost of the enrolment per the period supplied in PeriodInd. (e.g. If you charge $40 every fortnight for this enrolment, then set PeriodInd = 3 and set CostPerPeriod = 40 – should not include currency symbol)
JoiningFeeCost	If the member paid a joining fee for starting this enrolment please include the amount here. (e.g. 100.00 – should not include currency symbol)

Personally Identifiable Information

As per the above extract definitions, SportsEye does NOT request or require any personally identifiable pieces of information. While address information IS a requirement, this is read during the import operation, geocoded and the address discarded at the end of the import job. It is not persisted within our systems and never retrievable through our software.

If however your organisation chooses to subscribe to our retention module we do need to request some additional personal information about your members to allow your staff to contact those at-risk – this includes their name, email address and phone number.

This personally identifiable information will only be used within the retention module - you will never be able to drill down into analysis data in other modules to personally identify an individual member.

From early 2021 – this personally identifiable information will also be encrypted at rest for added data security internally.

We currently only require this information from operators who subscribe to our retention module.

Column	Description
*MemberIdentifier	This is the UNIQUE identifier from the Members Extract that identifies a member.
FullName *(max 255 chars)*	The full name of the member (firstname + lastname)
EmailAddress *(max 255 chars)*	The email address of the member
PhoneNumber *(max 255 chars)*	The mobile or landline number of the member

Secure File Transfer Process

Introduction

Your extract file can be securely uploaded to our severs via SFTP – a secure and encrypted file transfer protocol to ensure your data is safe during transit.

You account manager will issue you with:

1. A unique HOST NAME
2. A unique PRIVATE KEY file which you will use to authenticate with our SFTP service. *Please ensure you keep this secure.*

SFTP is an open protocol and you're free to use any SFTP software, however if you don't already have software capable of making an SFTP connection then we recommend WinSCP which can be freely downloaded here:

https://winscp.net/

Step 1: Create the site

Create a New Site in WinSCP – ensuring the protocol is set to SFTP, the Host Name is populated with your unique host name, and the port number is set to 22.

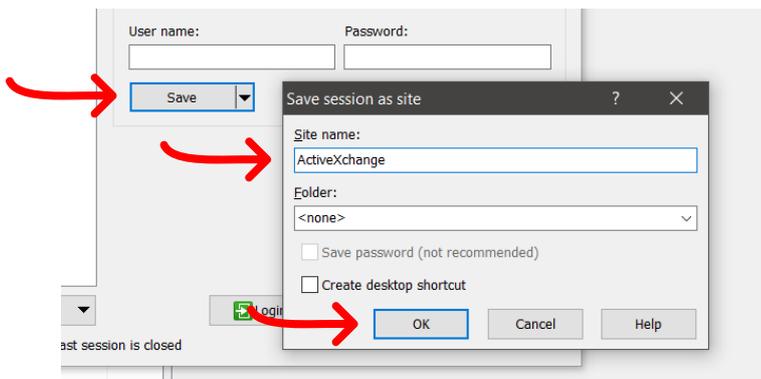Click the **Advanced** button when you're ready:
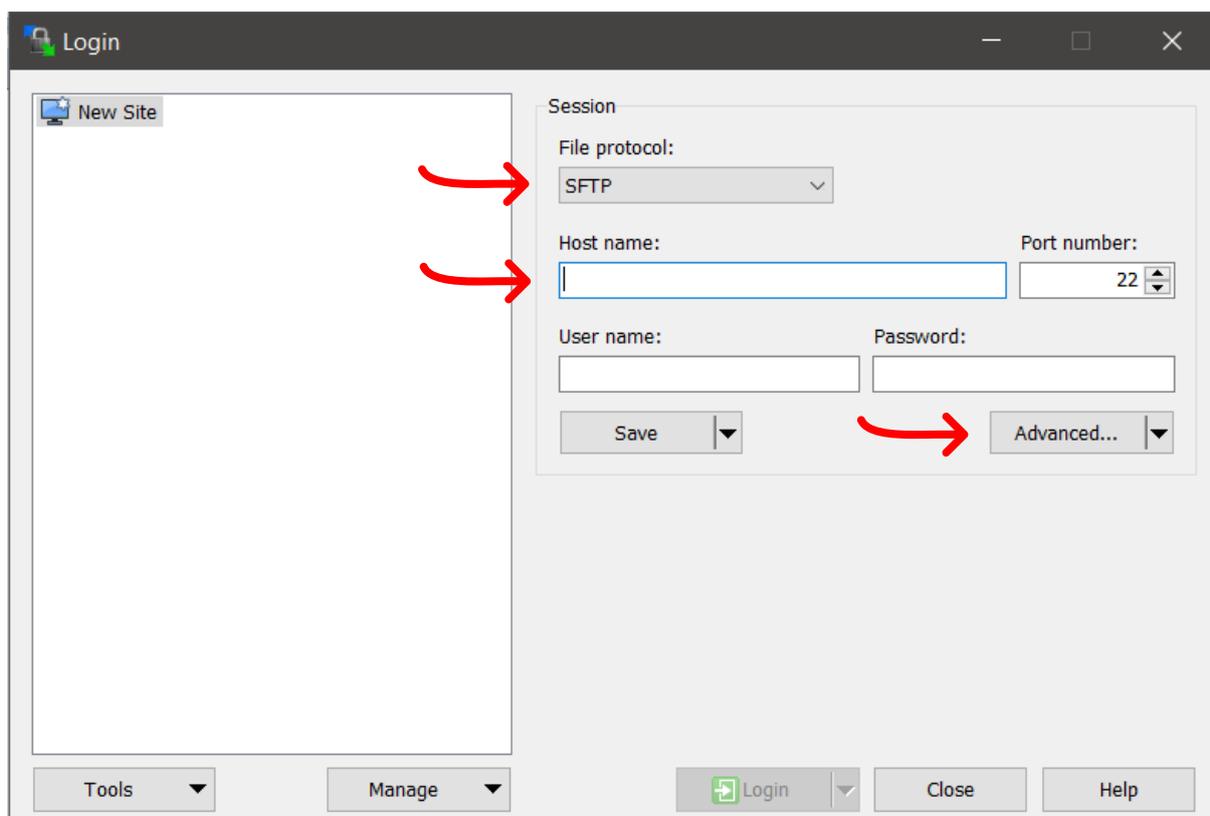
Step 2: Add your Private Key

Select **Authentication** from the left-hand menu, and then browse and select your private key file. Once selected, click **OK** to close the advanced settings window.
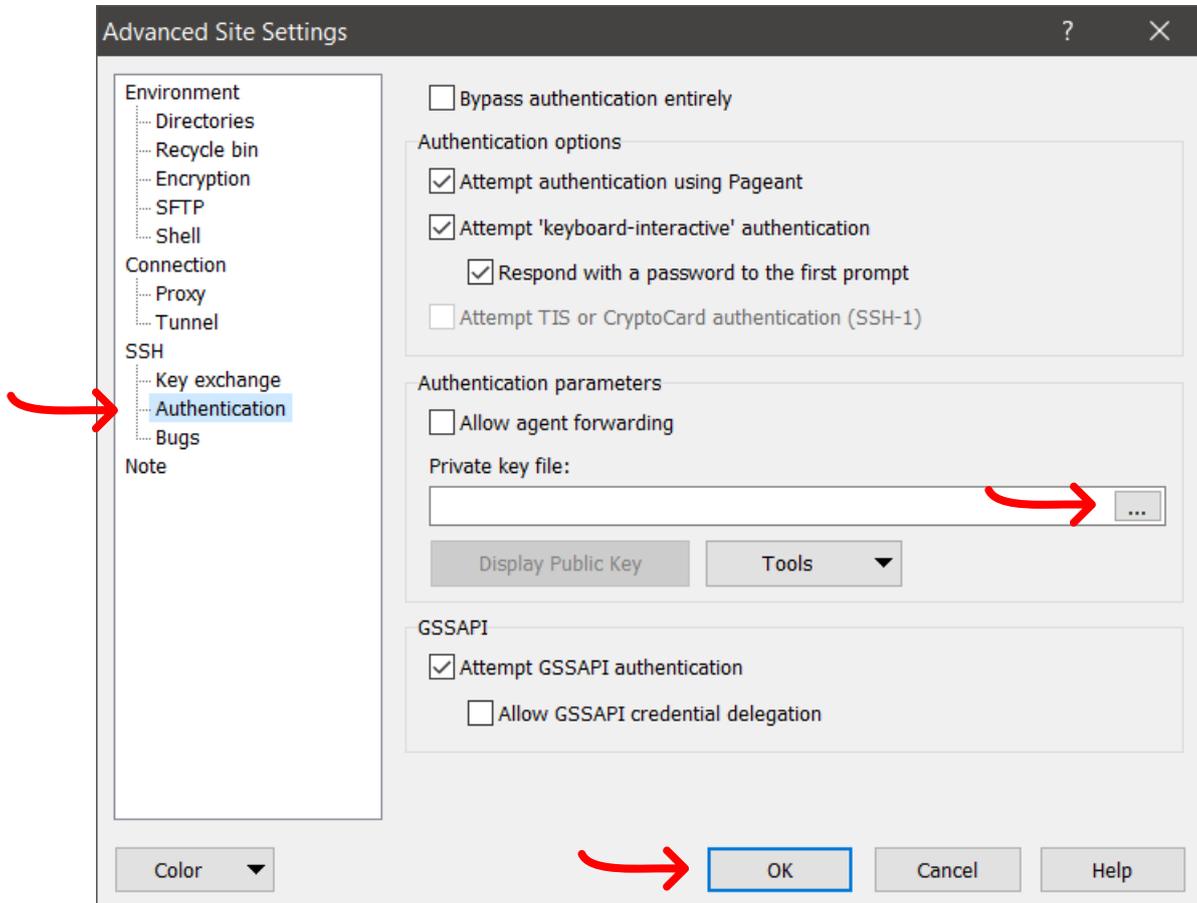
## Step 3: Save your connection settings for future use

Finally, click the **Save** button – provide a memorable Site name and click **OK**

Step 4: Disable timestamps

Our SFTP service does not allow file timestamps to be set so this option must be disabled within WinSCP or the equivalent setting in your own software. (screenshots on the next page)

1. Select **Options** from the main menu bar, then **Preferences**
2. Select **Transfer** from the left-hand menu, then the preset labelled **Default** followed by the **Edit** button.
3. In the Transfer Settings window that appears, make sure there is no check in the **Preserve Timestamp** option under Common Options.
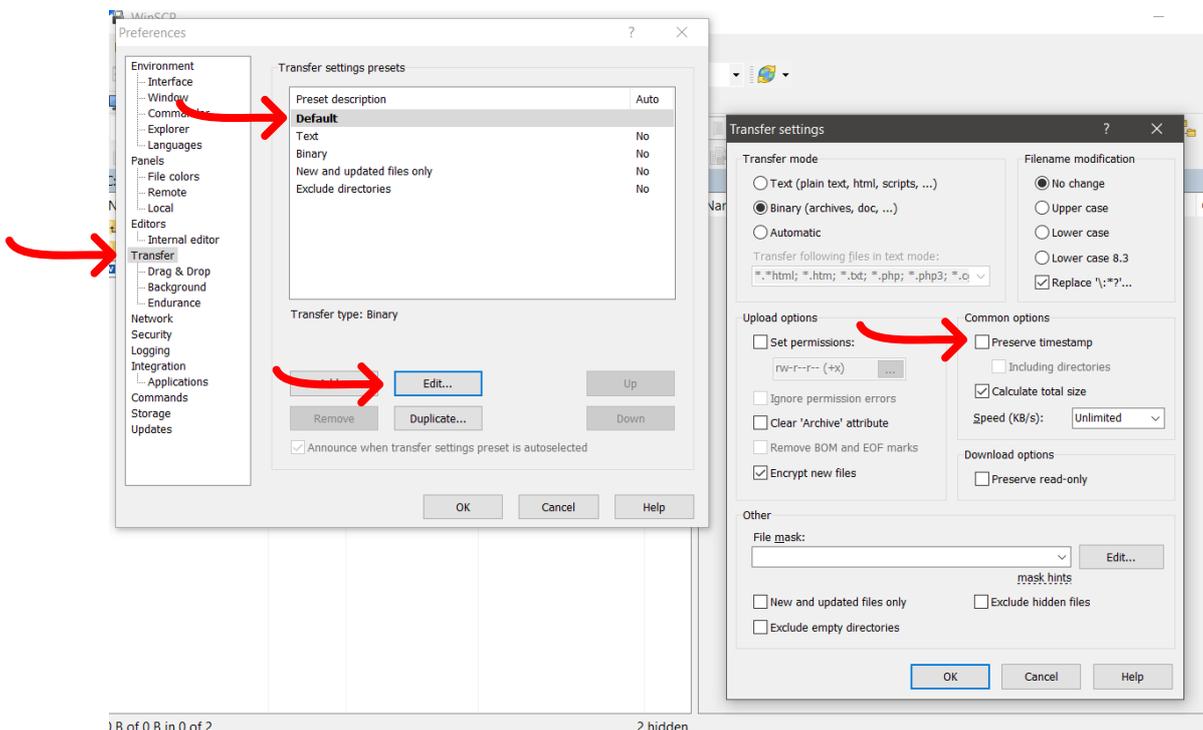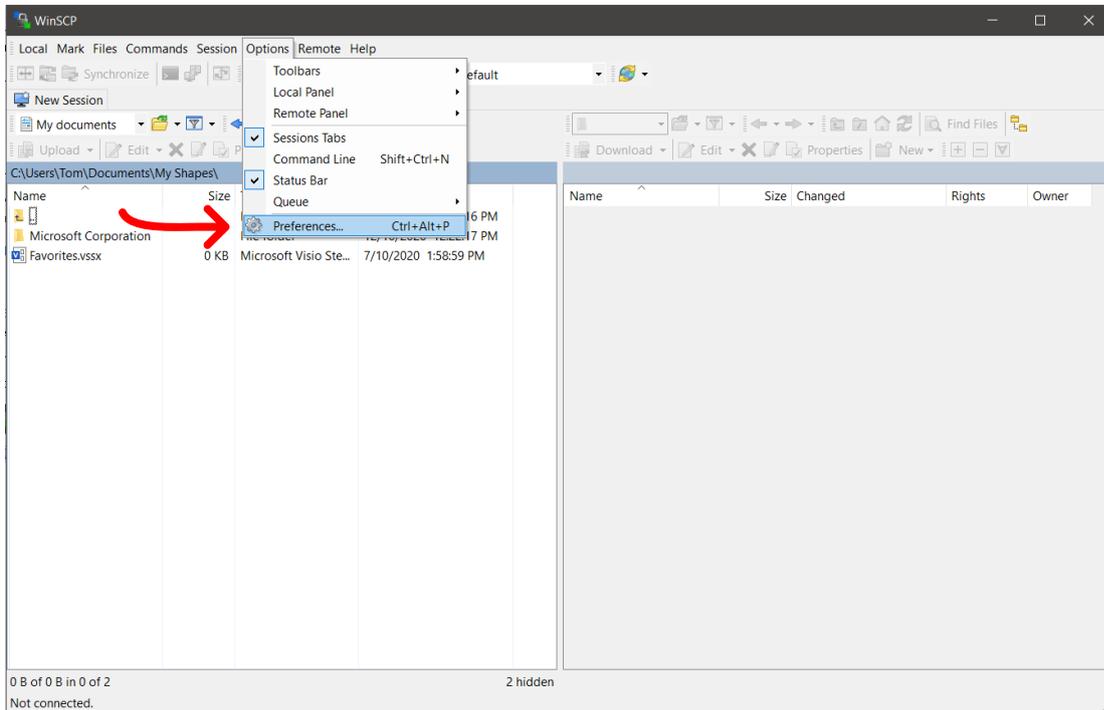
Step 6: Connect and submit your file

Click the **LOGIN** button to connect to your personal SFTP site at ActiveXchange.
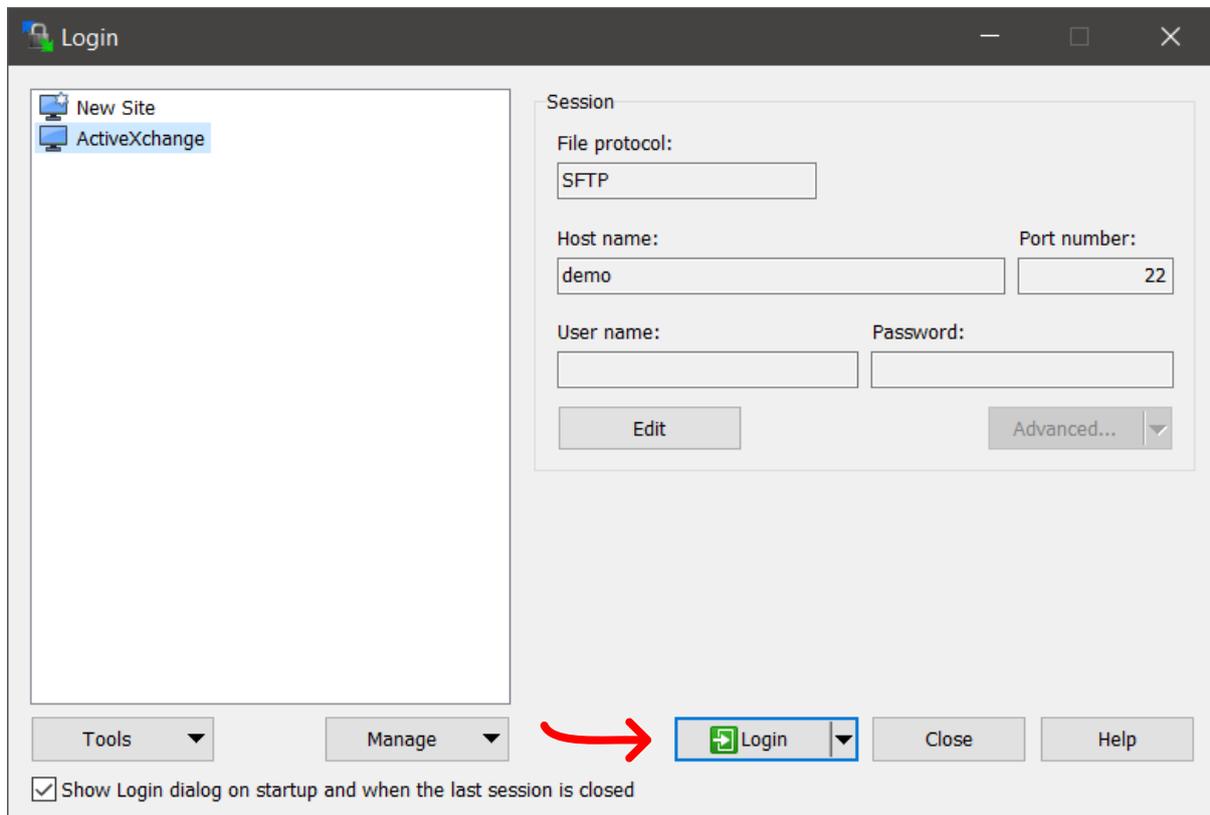
If you encounter any errors, please review each step of this documentation to ensure you've setup the site correctly. If you're confident these are all set correctly – please contact your account manger for support.

Once connected, you'll be presented with a split screen showing your local file system on the left and our remote file system on the right. Navigate on the left hand side to the file you wish to upload and then drag it from the left panel to the right panel to begin the upload.
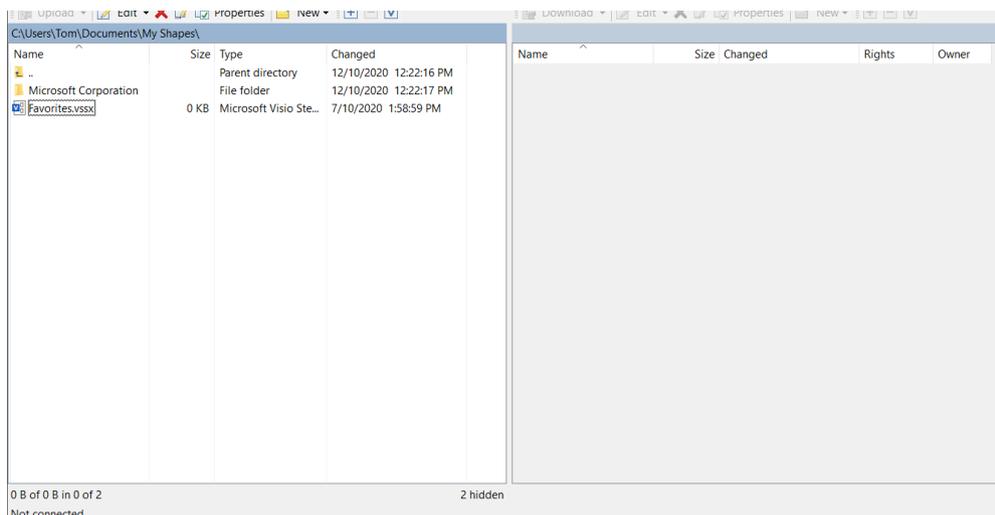
Automation

This documentation on SFTP is meant as a "beginners guide" for those unfamiliar with the process. For regular scheduled transfers of files, WinSCP and other SFTP programs can be scheduled to automate file transfer rather than require human interaction to do so.

Many clients may choose to use SQL Server Reporting Services to extract the data on a regular schedule and then configure WinSCP to automatically transfer that extract to us such that this process of providing data to ActiveXchange becomes completely automated.

It is beyond the scope of this documentation to guide you through this process, however your own IT department or support services should be able to assist in this area.