

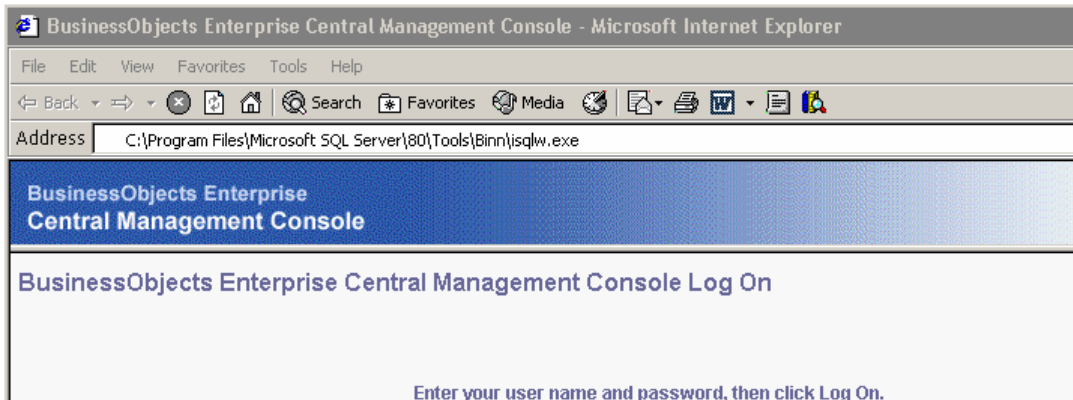
Last Updated: September 2007

II.2 UA Foundation Annual Recognition Report Procedure

Note: To run this, a person needs access to one of the web page applications on foundrewprod and SQL Server access (this does NOT come with RE access)

1. Open a web browser from citrix (either the Crystal Admin page or the Infoview page)
2. In the address bar, select all and type (or copy/paste) the following:

C:\Program Files\Microsoft SQL Server\80\Tools\Binn\isqlw.exe



3. In the connect to SQL server box
 - a. Leave SQL server as (local)
 - b. Connect using Windows Authentication





4. File --> Open
5. Open d:\SQL Code\annual recog.sql

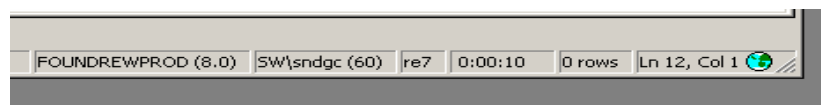
This script loops through every constituent in the database, searching for gifts for the given date range (signified by @begin_date and @end_date). The reason this loops through all constituents is because adding 'or' to a T-SQL cursor dramatically decreases its efficiency. It then takes the results of each row of the cursor and pushes them into a temporary table called temp_annual_recog. This is to allow us to run additional scripts against this data, such as spouse removal.

6. If necessary, change @begin_date and @end_date to the appropriate date range

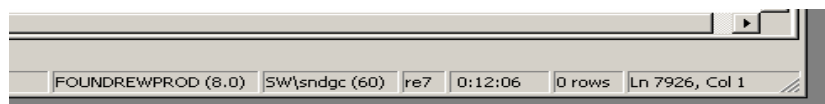
```
/*  
* Parameter Variables  
*  
* Change these to change them throughout the program  
*  
*/  
declare @begin_date datetime  
declare @end_date datetime  
  
set @begin_date = '7/1/2005' ;  
set @end_date = '6/30/2006' ;  
  
/*  
* Report Table Creation  
*  
*/
```

7. Push F5 to run the script

This process takes approximately 12 to 15 minutes to finish. It does not show any data, so the only way to know that it is done running is the world in the lower right corner will disappear



Into



8. Open d:\SQL Code\spouse_info.sql

This script loops through all of the records in the temp_annual_recog table and determines which spouse should be removed by looking at the cumulative giving level. When finished, it selects all rows and columns from the table and displays them in the “grids” tab, then deletes the temp table.

9. Push F5 to run the script

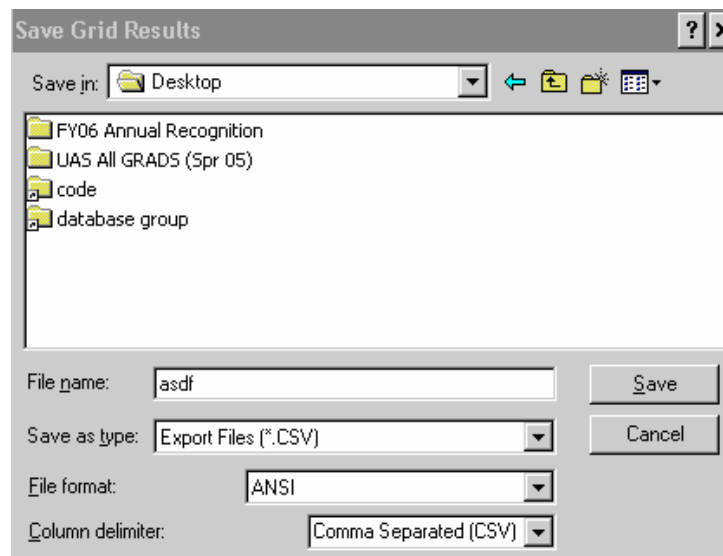
This process takes approximately 30 seconds to finish. When finished, the process will bring up the “grids” tab, which will have the results displayed.

key_ind	rec_id	const_id	last_name	first_name	org_name	spouse_id	sp_last_name	sp_first_name	Sp	
1	Key Indicator	Records ID	Constituent ID	Last Name	First Name	Org Name	Spouse ID	Spouse Last Name	Spouse First Name	Sp
2	I	31	30098382	Matthews	James	NULL	55844	Matthews	Barbara	NUI
3	I	37	30039203	Damron	Debra	NULL	30037551	Gutoski	Martin	NUI
4	I	39	19	Swarner	Jo	NULL	69240	Swarner	Don	NUI
5	I	40	20	Sherman	Anne	NULL	NULL	NULL	NULL	NUI
6	O	72	48	NULL	NULL	"Bentley Family Trust"	NULL	NULL	NULL	NUI
7	O	73	49	NULL	NULL	"Helen M. Bentley Trust"	NULL	NULL	NULL	NUI
8	O	74	50	NULL	NULL	"National Bank of Alaska"	NULL	NULL	NULL	NUI
9	O	75	51	NULL	NULL	"CHEMM Company, Inc."	NULL	NULL	NULL	NUI

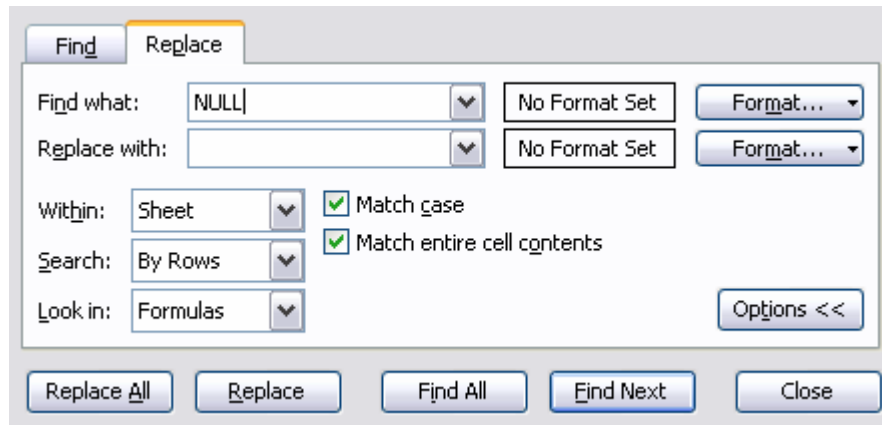
Query batch completed. FOUNDRWPROD (8.0) SW(sndgc (60) re7 0:00:10 2641 rows Ln 11, Col 44

10. Click the upper left hand corner of the “grids” tab to select all of the rows, then right click in the top left hand corner of the “grids” tab, and select save as.

11. Save the file where appropriate as a .CSV file. The file format should be ANSI and the column delimiter should be “Comma Separated (CSV).”



12. Open the .csv file
13. File – save as, and change the “save as type” to “Microsoft Office Excel Workbook”
14. Do the following search and replaces (check the exact match and whole field check boxes under options):
 - a. NULL with blank
 - b. None with blank
 - c. 0 with blank



15. Select all number columns and format them as currency with no decimal points