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II.6 Running User/Donor Endowment/Non-Endowed Fund Reports

This document describes how to run the donor/user endowment and non-endowed fund reports. Note: you must have SQL server access to both the production RE SQL server and the production FE SQL Server. These accounts are not created by default and must be added separately from all other accesses. These reports also print everything in the same order to ease the transition from individual pieces into complete packets to be sent.

Running the Endowment/Non-Endowed Reports

1. Open and log into Crystal Reports Infoview
2. Navigate to: public folders\accounting reports\fund reports
3. Select the appropriate file to run
 - a. Donor – Endowment report – By Campus
Runs the endowment report for a select campus(es)
 - b. Donor – Endowment Report -- by ID
Runs the endowment report for select endowment IDs
 - c. User – Endowment Report – by Campus
Runs the endowment report for a selected campus(es)
 - d. User – Endowment Report -- by ID
Runs the endowment report for select endowment IDs
 - e. User – Fund report – by Campus
Runs the fund report for a select campus(es)
 - f. User – Fund Report – by ID
Runs the fund report for select fund IDs



4. Run the report
 - a. Select the campuses or input the IDs to run the report for
 - b. Put in the appropriate date ranges
 - c. Click the “okay” button
NOTE: Infoview may seem like it is not doing anything for up to 30 seconds. The report is refreshing a view in SQL, after which it should start running the actual report.
5. Export the report as a PDF file to your computers desktop.
6. Print the PDF file to the duplex printer next to Karesa
 - a. This report is designed to be printed double sided, not single sided
 - b. It is designed to be printed on second page letterhead, which should be inserted face up with the blue bar facing towards you (← Doug to check this before publishing this document)

Printing the Cover Letters for the Reports

Note that this is the only piece of the report that should only be run from crystal reports itself. You cannot run this correctly from Infoview (even though it is saved in Infoview for backup purposes.)

1. Open Crystal Reports
2. Navigate to: enterprise items\Letter reports
3. Select the appropriate file to run
 - a. Donor – Cover Letter
Cover letter for the donor reports
 - b. User – Cover Letter
Cover letter for the user reports
4. Modify the letter for this particular running of the reports



5. Print the letters on Foundation letterhead

Printing the Mailing Labels for the Reports

1. Open and log into Crystal Reports Infoview
2. Navigate to: public folders\Letter reports
3. Select the appropriate file to run
 - a. Donor – Mailing Labels
Labels for the donor reports
 - b. User – Mailing Labels
Labels for the user reports
4. Run the report
Select the appropriate campus(es)
5. Load the printer with Avery 5160 labels
6. Print the report onto the labels.

Compile the Packets

1. Stack from left to right:
 - a. Cover letters
 - b. Fund Reports – By person
 - c. Endowment Reports – By Person
 - d. Fund reports – Organizational (by position)
These will not show the persons name and are sorted towards the back of the reports
 - e. Endowment Reports – Organization (by position)
These will not show the persons name and are sorted towards the back of the reports



2. From left to right, you stack the cover letter for the reports on top of the reports. Not all people will have something out of all stacks.
3. The labels are printed in the same order as the reports, so as long as you keep the cover letters/reports in the same order, you can walk thru the labels in the same way.