
How to Use Crystal Reports with a Session ID

Ver. 1

26 July 2018

This instruction is for using Crystal reports with an Advance Session ID.

1. Open Advance.

The screenshot shows the University of Arkansas website for Information and Technology Services. The header includes the university logo, navigation links (HOME, FEATURES, OFFICES, ABOUT, DIRECTORY), and a search bar. A red 'GIVE TODAY!' button is in the top right. The main content area is titled 'Information and Technology Services' and includes a breadcrumb trail: 'U of A / University Advancement / Offices / Information and Technology Services'. Below this is a paragraph describing the services. To the right is a 'Training Documents' sidebar with links for 'Advanced', 'BlackBaud', 'Crystal', 'How to files', 'Notice of Student Support', and 'Training Overview'. At the bottom left is a 'Quick Links' section with a green box around the first three items: 'Advance for General Users', 'Advance for Central Development Users', and 'Advance for Alumni Association Users'. A green arrow points from the 'GIVE TODAY!' button to this 'Advance for General Users' link. To the right of 'Quick Links' is a 'Request Forms' section with links for 'Report Request Form', 'Advance/Crystal Reports ID Request Form', 'NOSS- Notice of Student Support ID Request Form', and 'Blackbaud ID Request Form'. At the bottom is a 'STAFF' section listing six employees with their titles, email addresses, and phone numbers.

University Advancement

HOME FEATURES OFFICES ABOUT DIRECTORY

GIVE TODAY!

Information and Technology Services

U of A / University Advancement / Offices / Information and Technology Services

Information and Technology Services is responsible for University Advancement information data systems and user computing hardware and software.

The information or data side includes all on-line system maintenance, security, training, and data retrieval. Its main duties include ID setup, security, and training for on-line systems including Advance, Crystal Reports Server, NOS and Blackbaud; database and on-line system upgrades and enhancements for Advance, CRS, and the NOS; data imports and exports to and from other systems; and data retrieval and distribution from all data systems involved. We are here to help.

Quick Links

- [Advance for General Users](#)
- [Advance for Central Development Users](#)
- [Advance for Alumni Association Users](#)
- [Advance TRAIN \(For Training Purposes\)](#)
- [Crystal Reports on the EDGE Server](#)
- [Blackbaud](#)

Request Forms

- [Report Request Form](#)
- [Advance/Crystal Reports ID Request Form](#)
- [NOSS- Notice of Student Support ID Request Form](#)
- [Blackbaud ID Request Form](#)

Training Documents

- [Advanced](#)
- [BlackBaud](#)
- [Crystal](#)
- [How to files](#)
- [Notice of Student Support](#)
- [Training Overview](#)

STAFF

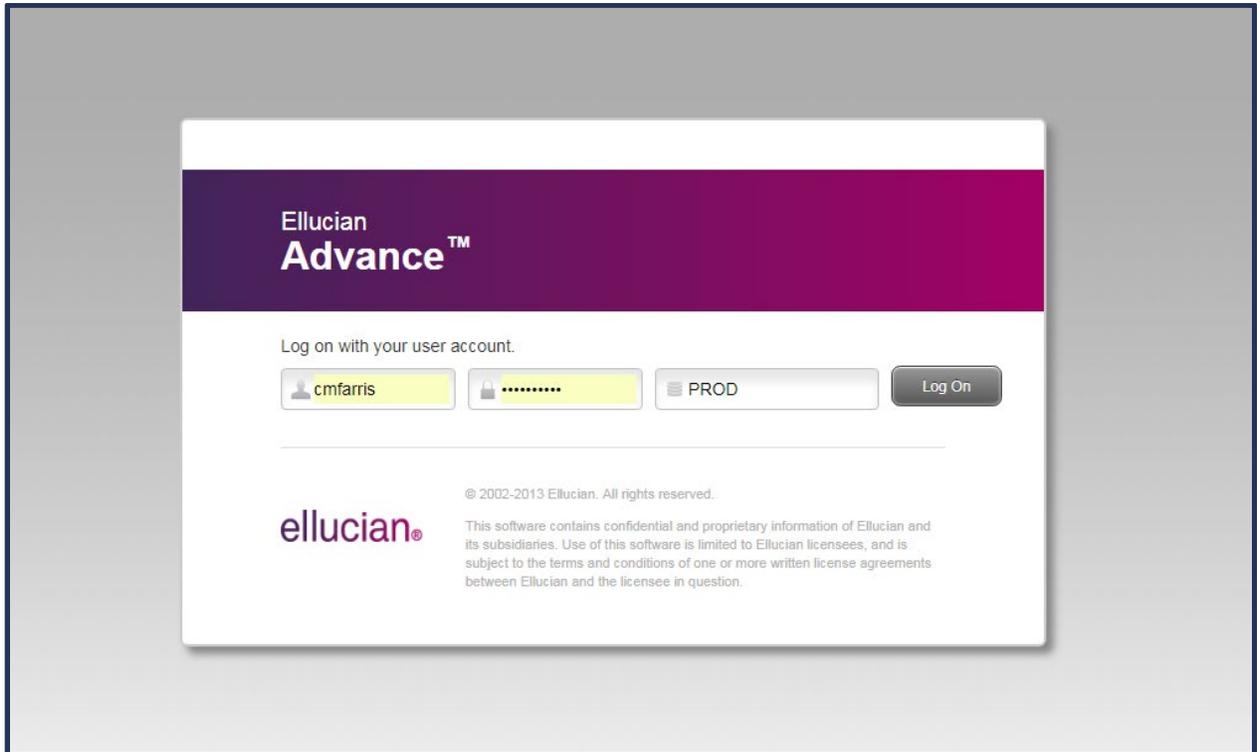
Jamie Dixon Director jamiee@uark.edu 479-575-6745	Tate Neyman Systems Analyst cneyman@uark.edu 479-575-5626	Caleb Mikles Report Writer jmikles@uark.edu 479-575-3520	Daniel V. McClelland Systems Analyst dvmccl@uark.edu 479-575-3530	Joshua Tipton Report Writer tjptonj@uark.edu 479-575-3516	Christopher M. Farris Trainer & Security Officer cmfarris@uark.edu 479-575-4135
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2. Log in.



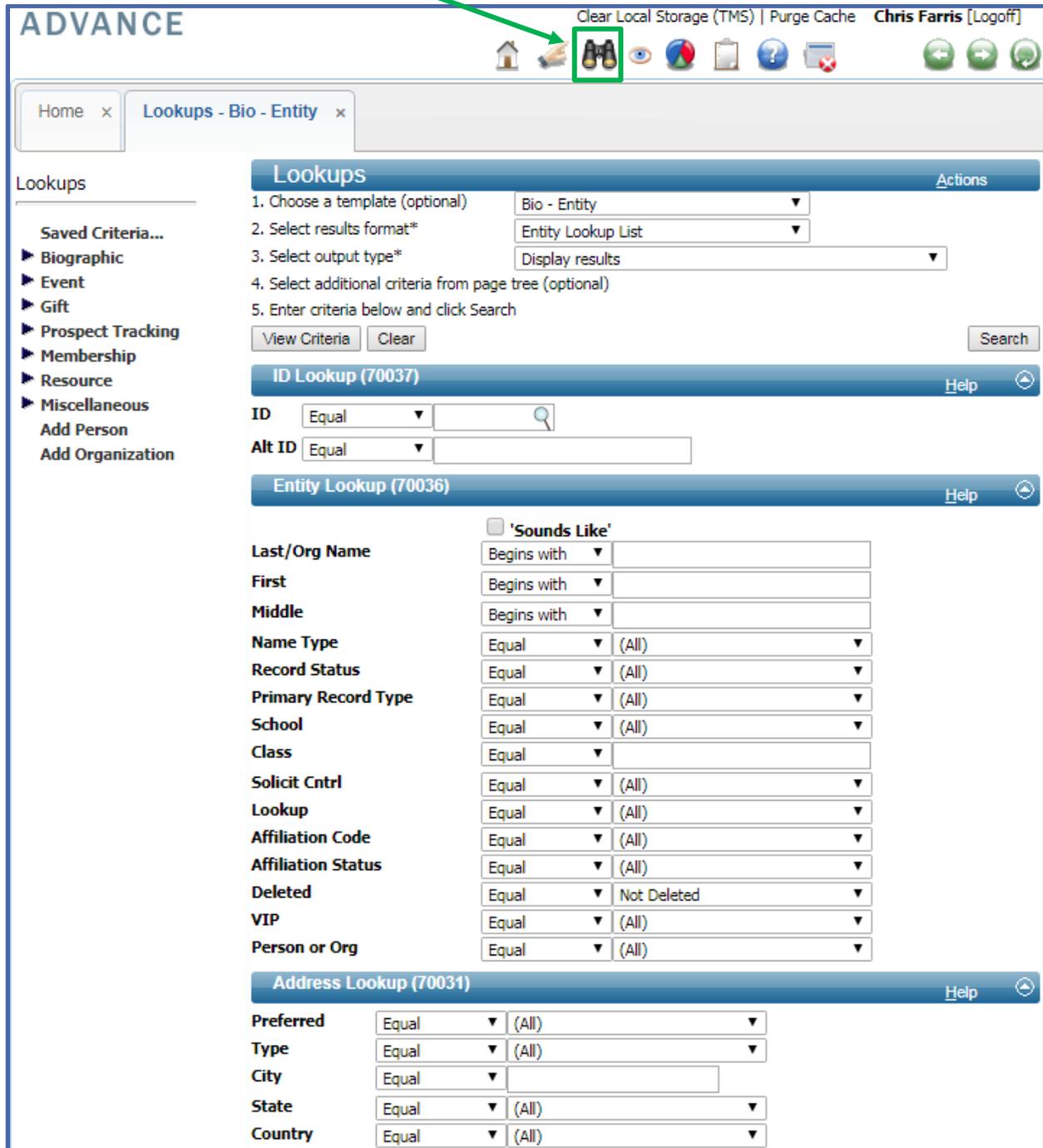
The screenshot shows the Ellucian Advance login interface. At the top, there is a dark purple header with the text "Ellucian Advance™". Below the header, the text "Log on with your user account." is displayed. The login form consists of four input fields: a username field containing "cmfarris", a password field with masked characters "*****", a dropdown menu set to "PROD", and a "Log On" button. Below the login fields, there is a horizontal line, followed by the "ellucian®" logo on the left and a copyright notice on the right: "© 2002-2013 Ellucian. All rights reserved. This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question."

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3. Choose the Lookup Tool.



The screenshot shows the ADVANCE software interface. At the top, there is a navigation bar with the word "ADVANCE" on the left and several utility icons on the right, including a binoculars icon which is highlighted with a green box and a green arrow pointing to it from the text "3. Choose the Lookup Tool." above. The main content area is titled "Lookups" and contains several sections:

- Lookups** (Actions):
 - 1. Choose a template (optional): Bio - Entity
 - 2. Select results format*: Entity Lookup List
 - 3. Select output type*: Display results
 - 4. Select additional criteria from page tree (optional)
 - 5. Enter criteria below and click Search
- ID Lookup (70037)** (Help):
 - ID: Equal
 - Alt ID: Equal
- Entity Lookup (70036)** (Help):
 - 'Sounds Like'
 - Last/Org Name: Begins with
 - First: Begins with
 - Middle: Begins with
 - Name Type: Equal (All)
 - Record Status: Equal (All)
 - Primary Record Type: Equal (All)
 - School: Equal (All)
 - Class: Equal
 - Solicit Cntrl: Equal (All)
 - Lookup: Equal (All)
 - Affiliation Code: Equal (All)
 - Affiliation Status: Equal (All)
 - Deleted: Equal (Not Deleted)
 - VIP: Equal (All)
 - Person or Org: Equal (All)
- Address Lookup (70031)** (Help):
 - Preferred: Equal (All)
 - Type: Equal (All)
 - City: Equal
 - State: Equal (All)
 - Country: Equal (All)

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4. Search for the Entity or Entities that you want to run a report on.

The screenshot shows the ADVANCE software interface. At the top, there is a navigation bar with 'Home' and 'Lookups - Bio - Entity' tabs. The main content area is titled 'Lookups' and contains several sections:

- Lookups**: A section with instructions and a search button. The instructions are: 1. Choose a template (optional) - Bio - Entity; 2. Select results format* - Entity Lookup List; 3. Select output type* - Display results; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. There are 'View Criteria' and 'Clear' buttons.
- ID Lookup (70037)**: A section with 'ID' and 'Alt ID' search fields, both set to 'Equal'.
- Entity Lookup (70036)**: A section with a 'Sounds Like' checkbox and a list of search criteria. The 'Sounds Like' checkbox is checked. The search criteria are: Last/Org Name (Begins with farris), First (Begins with chris), Middle (Begins with), Name Type (Equal (All)), Record Status (Equal (All)), Primary Record Type (Equal (All)), School (Equal (All)), Class (Equal), Solicit Cntrl (Equal (All)), Lookup (Equal (All)), Affiliation Code (Equal (All)), Affiliation Status (Equal (All)), Deleted (Equal Not Deleted), VIP (Equal (All)), and Person or Org (Equal (All)).
- Address Lookup (70031)**: A section at the bottom.

A green arrow points from the instruction '4. Search for the Entity or Entities that you want to run a report on.' to the 'Entity Lookup (70036)' section, specifically to the 'Sounds Like' checkbox and the search input field containing 'farris'.

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IF YOU WANT TO RUN A SESSION ID FOR MULTIPLE RESULTS
CONTINUE WITH THESE STEPS. IF NOT SKIP TO STEP 7.

5. Choose **Actions** from the second bar.
6. Choose **Reports** from the drop-down.

The screenshot shows the ADVANCE software interface. At the top, there is a navigation bar with 'Home' and 'Lookup Results' tabs. Below this is a sidebar with 'Lookups' and 'Saved Criteria...' sections. The main content area displays 'Lookup Results' for 'Entity Lookup List (50401) (1/6)'. The results are listed in a table with columns for 'Items', 'to 6 of 6', and 'New Search'. The 'Actions' menu is open, showing options like 'Sort', 'Filter', 'Copy', 'Copy/Replace', 'Copy All', 'Copy All/Replace', 'Reports', 'Print Form', and 'Export Form'. A green arrow points from the 'Actions' menu to the 'Reports' option.

Items	to 6 of 6	New Search	Refine Search
...	#532188 (Nickname) (Parent)	08/05/1970 (48)	
	376 McKnight Avenue West Fork, AR 72774-3144		
...	Ms. Ch #609723 (Friend)		
	1212 North Boxley Avenue Fayetteville, AR 72704-2103		
...	Mr. #532188 (Parent)	08/05/1970 (48)	
	376 McKnight Avenue West Fork, AR 72774-3144		
...	Mr. #686303 (Registered Name) (Student)	12/28/1990 (27)	
	5723 West Reliance Street Fayetteville, AR 72704-5659		
...	#686303 (Complete) (Student)	12/28/1990 (27)	
	5723 West Reliance Street Fayetteville, AR 72704-5659		
...	#532188 (Complete) (Parent)	08/05/1970 (48)	
	376 McKnight Avenue West Fork, AR 72774-3144		

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IF YOU WANT TO RUN A SESSION ID FOR A SINGLE ENTITY FOLLOW THESE STEPS.

7. Click on the single entity you wish to view.
8. From their Entity Overview.
9. Select the **Actions** in the top bar, then **Reports** just like you see on the previous page.

The screenshot shows the 'Entity Overview' page for a person. The page is divided into several sections:

- Entity Overview** (top right): Includes 'Actions' and 'Print' buttons. Below the title, it shows 'Mr. [Redacted] #532188', 'Rec Type: Parent, Staff', 'Degree: 08/05/1970 (48)', 'PM Manager: AAA', and 'Married to: Mrs. [Redacted] (#532012 (M))'.
- Contact Information (50100)** (middle right): Includes 'Actions' and 'Help' buttons. It lists 'Home (Preferred)' and 'Business' addresses and phone numbers.
- Other Active Telephone Info (100503) (0)** (bottom right): Includes 'Actions' and 'Help' buttons.

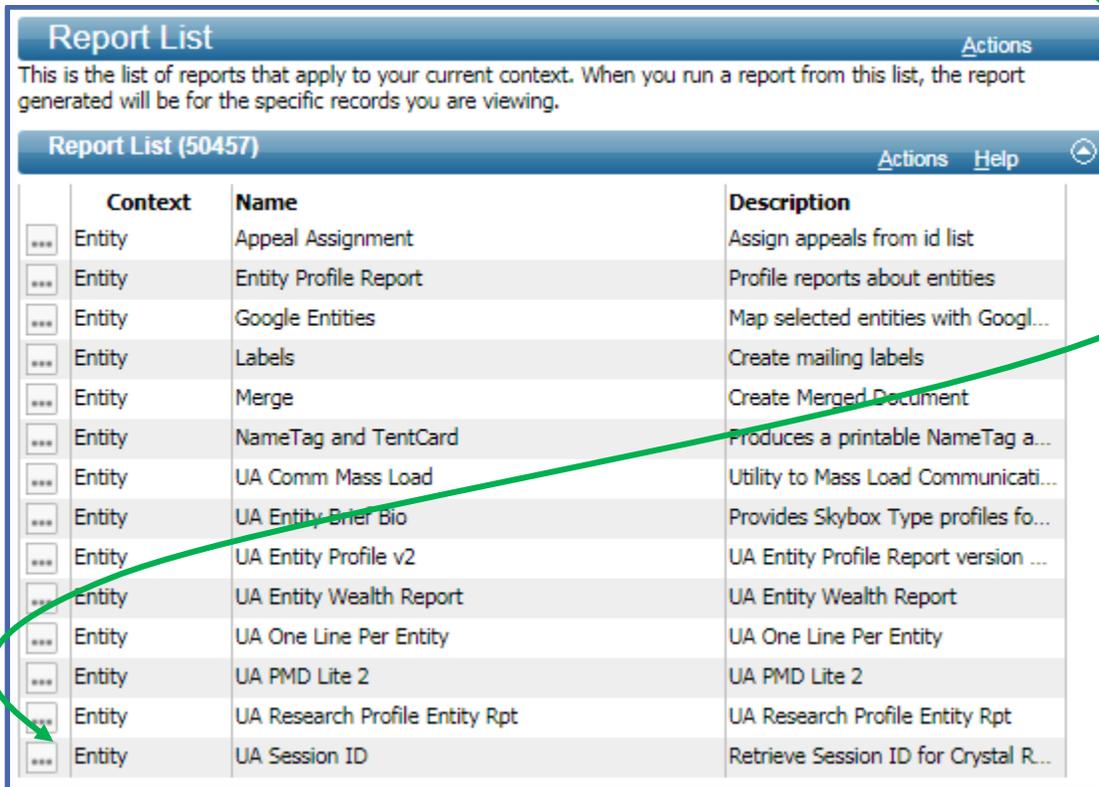
A green arrow points from the 'Reports' text in step 9 of the instructions to the 'Actions' button in the 'Entity Overview' section.

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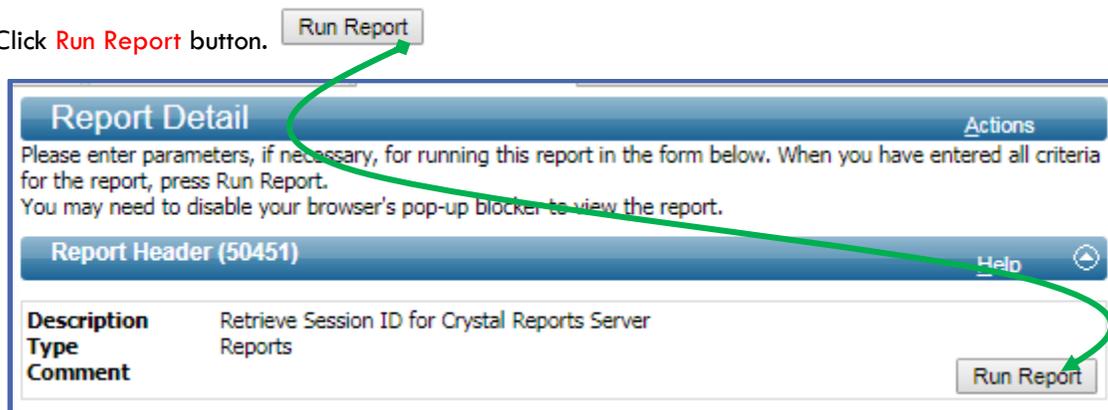
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10. (Continue from either step 6 or step 9 above.) Choose **UA Session ID**. Click the ellipses. 



	Context	Name	Description
...	Entity	Appeal Assignment	Assign appeals from id list
...	Entity	Entity Profile Report	Profile reports about entities
...	Entity	Google Entities	Map selected entities with Googl...
...	Entity	Labels	Create mailing labels
...	Entity	Merge	Create Merged Document
...	Entity	NameTag and TentCard	Produces a printable NameTag a...
...	Entity	UA Comm Mass Load	Utility to Mass Load Communicati...
...	Entity	UA Entity Brier Bio	Provides Skybox Type profiles fo...
...	Entity	UA Entity Profile v2	UA Entity Profile Report version ...
...	Entity	UA Entity Wealth Report	UA Entity Wealth Report
...	Entity	UA One Line Per Entity	UA One Line Per Entity
...	Entity	UA PMD Lite 2	UA PMD Lite 2
...	Entity	UA Research Profile Entity Rpt	UA Research Profile Entity Rpt
...	Entity	UA Session ID	Retrieve Session ID for Crystal R...

11. Click **Run Report** button.



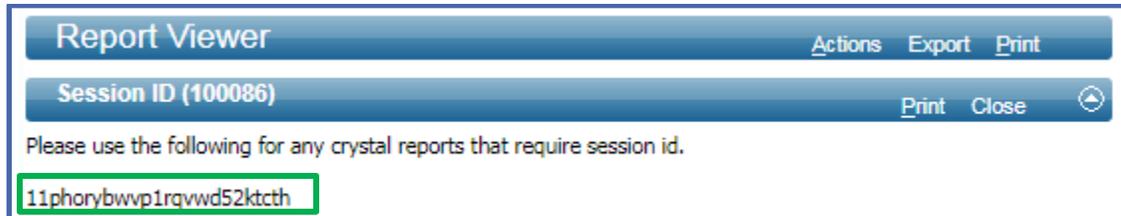
Description	Type	Comment
Retrieve Session ID for Crystal Reports Server	Reports	

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12. Copy your Session ID (use Control C or right-click—copy or write it down manually.) You will need this Session ID for your Crystal report.



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13. Open **Crystal Reports on the Edge Server** from the aits.uark.edu website.

The screenshot shows the University of Arkansas website. At the top left is the University of Arkansas logo. To its right is the text 'University Advancement' and a search bar. Below this is a navigation menu with 'HOME', 'FEATURES', 'OFFICES', 'ABOUT', and 'DIRECTORY'. A red 'GIVE TODAY!' button is on the right. The main heading is 'Information and Technology Services'. Below it is a breadcrumb trail: 'U of A / University Advancement / Offices / Information and Technology Services'. The main content area has a paragraph about Information and Technology Services. To the right is a 'Training Documents' sidebar with links: 'Advanced', 'BlackBaud', 'Crystal', 'How to files', 'Notice of Student Support', and 'Training Overview'. Below the main content are two columns: 'Quick Links' and 'Request Forms'. In the 'Quick Links' column, the link 'Crystal Reports on the EDGE Server' is highlighted with a green box. A green arrow points from this link to the 'Crystal Reports on the EDGE Server' link in the 'Training Documents' sidebar. At the bottom is a 'STAFF' section with contact information for six people.

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Training Documents

- [Advanced](#)
- [BlackBaud](#)
- [Crystal](#)
- [How to files](#)
- [Notice of Student Support](#)
- [Training Overview](#)

STAFF

Jamie Dixon Director jamiee@uark.edu 479-575-6745	Tate Neyman Systems Analyst cneyman@uark.edu 479-575-5626	Caleb Mikles Report Writer jmikles@uark.edu 479-575-3520	Daniel V. McClelland Systems Analyst dvmccl@uark.edu 479-575-3530	Joshua Tipton Report Writer tjptonj@uark.edu 479-575-3516	Christopher M. Farris Trainer & Security Officer cmfarris@uark.edu 479-575-4135
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14. Enter your User Name and Password.

- a. User Name = Your email prefix (e.g. cmfarris)
- b. Password = Whatever you have set it to

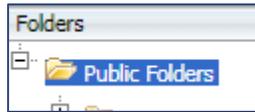


The screenshot shows the SAP BusinessObjects BI launch pad login interface. At the top, there is an orange horizontal bar. Below it, the text reads "SAP BusinessObjects" in a large, bold font, followed by "BI launch pad" in a smaller font. A message states: "Enter your user information, and click 'Log On'." Below this, a note says: "If you are unsure of your account information, contact your system administrator." The login form consists of three input fields: "System:" with the value "UARFDNPRPT1:6400", "User Name:", and "Password:". A "Log On" button is positioned to the right of the password field. At the bottom left is the SAP logo, and at the bottom right is a "Help" link.

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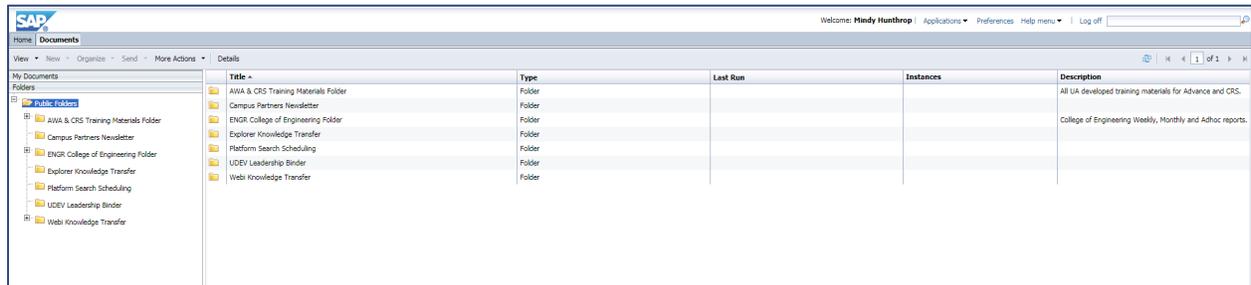
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15. Double-click on Public Folders.

16. Your screen should now look “something” like this.

IMPORTANT! EACH USER HAS A DIFFERENT VIEW. NOT ALL USERS CAN VIEW ALL FILES OR FOLDERS. YOUR FOLDER AND THE REPORTS IN IT MAY DIFFER FROM WHAT IS SHOWN IN THIS HOW-TO. THE PROCEDURES, HOWEVER, ARE THE SAME FOR EVERY REPORT.

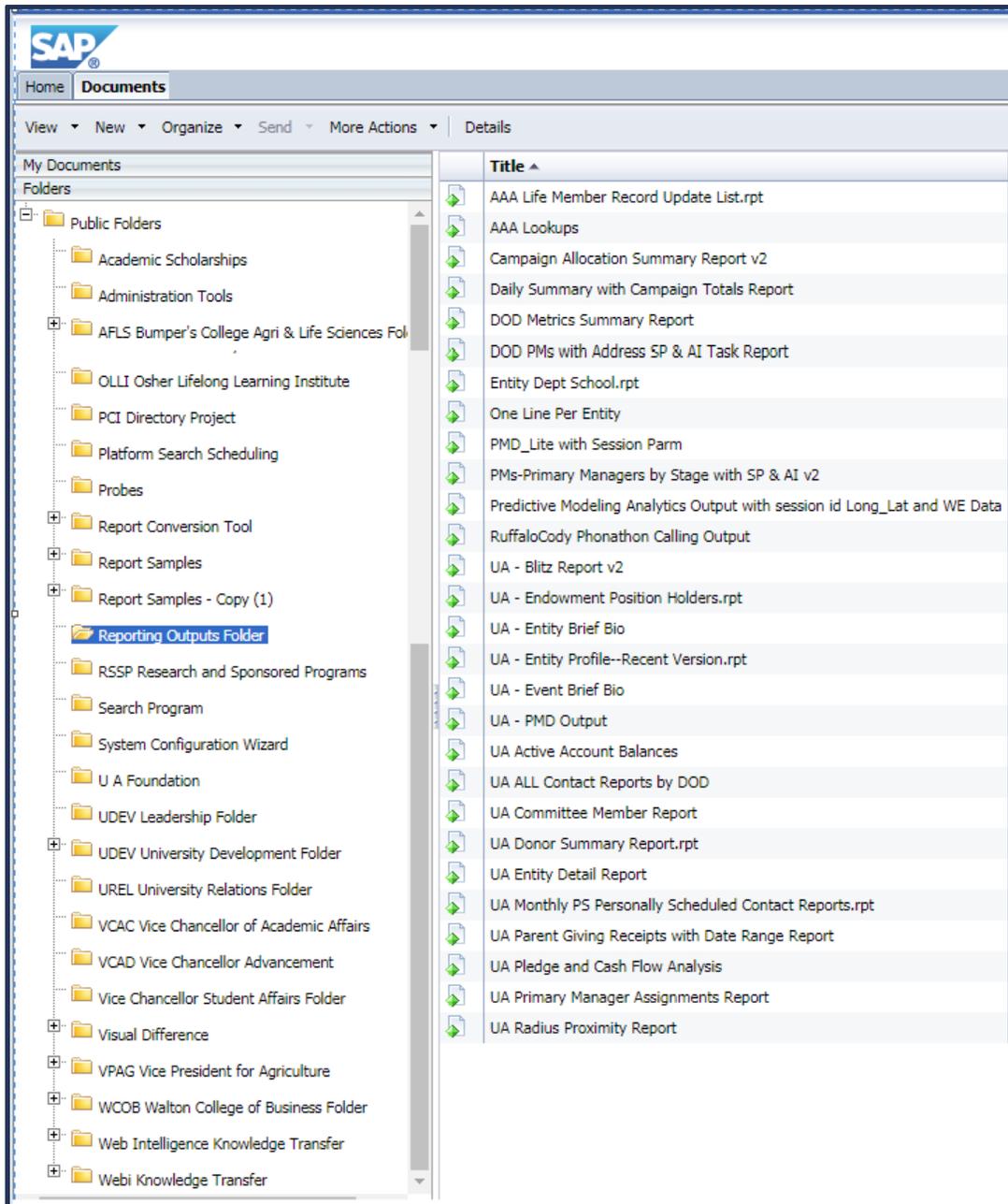


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17. Find the Reporting Outputs Folder (or location of report that you want to run) and double-click on it.

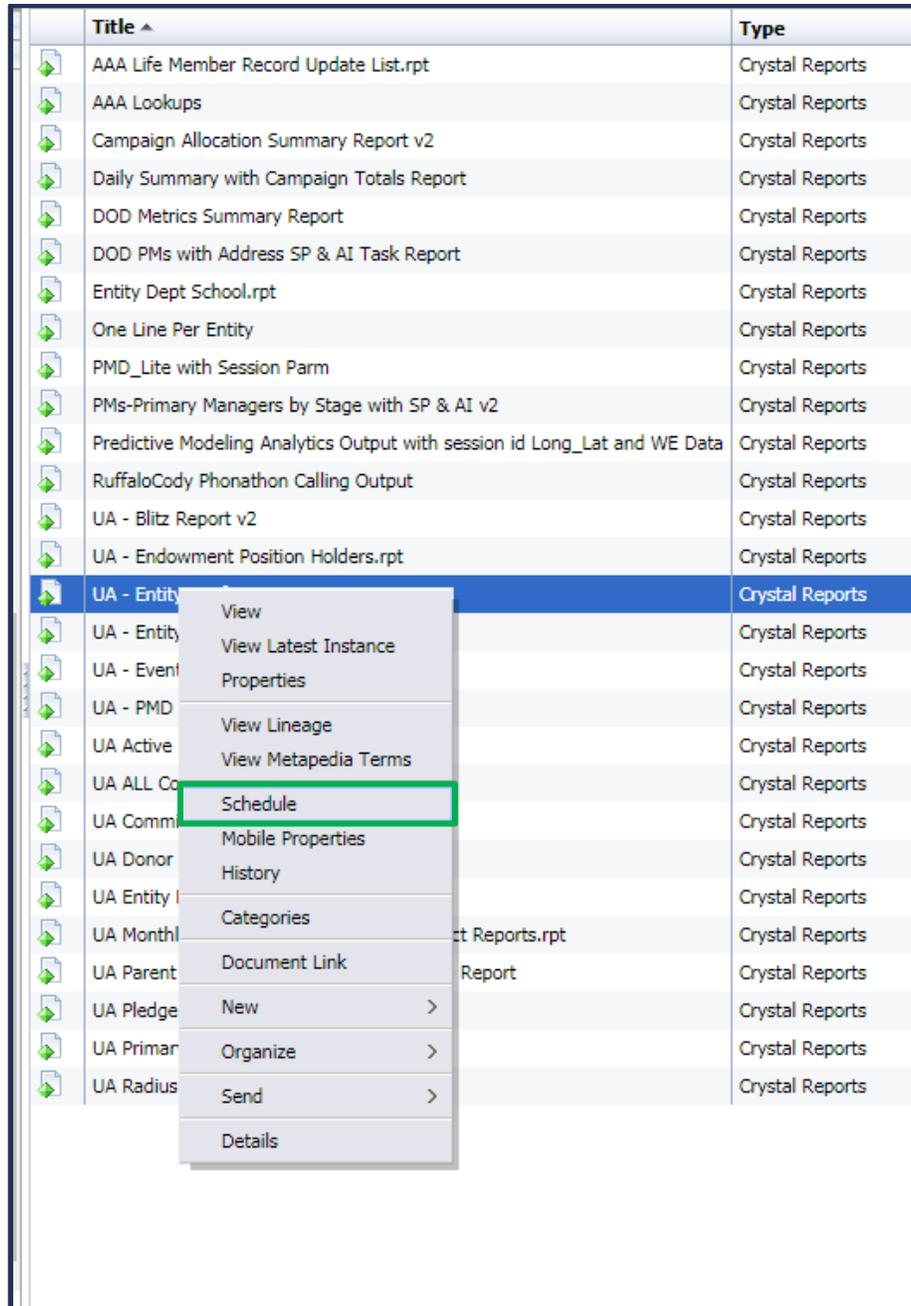


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18. Choose the report that you want to run with Session ID. (Right-click)
19. Choose Schedule.



Title ▲	Type
AAA Life Member Record Update List.rpt	Crystal Reports
AAA Lookups	Crystal Reports
Campaign Allocation Summary Report v2	Crystal Reports
Daily Summary with Campaign Totals Report	Crystal Reports
DOD Metrics Summary Report	Crystal Reports
DOD PMs with Address SP & AI Task Report	Crystal Reports
Entity Dept School.rpt	Crystal Reports
One Line Per Entity	Crystal Reports
PMD_Lite with Session Parm	Crystal Reports
PMs-Primary Managers by Stage with SP & AI v2	Crystal Reports
Predictive Modeling Analytics Output with session id Long_Lat and WE Data	Crystal Reports
RuffaloCody Phonathon Calling Output	Crystal Reports
UA - Blitz Report v2	Crystal Reports
UA - Endowment Position Holders.rpt	Crystal Reports
UA - Entity	Crystal Reports
UA - Entity	Crystal Reports
UA - Event	Crystal Reports
UA - PMD	Crystal Reports
UA Active	Crystal Reports
UA ALL Co	Crystal Reports
UA Comm	Crystal Reports
UA Donor	Crystal Reports
UA Entity I	Crystal Reports
UA Monthl	Crystal Reports
UA Parent	Crystal Reports
UA Pledge	Crystal Reports
UA Primar	Crystal Reports
UA Radius	Crystal Reports

- View
- View Latest Instance
- Properties
- View Lineage
- View Metapedia Terms
- Schedule
- Mobile Properties
- History
- Categories
- Document Link
- New >
- Organize >
- Send >
- Details

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20. Choose **Prompts**.

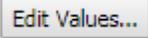
The screenshot shows the 'Schedule' dialog box for a report instance titled 'UA - Entity Brief Bio'. The dialog is split into two panes. The left pane contains a tree view of configuration options: 'Schedule' (expanded), 'Instance Title', 'Recurrence', 'Database Logon', 'Prompts' (highlighted with a green border), 'Filters', 'Formats', 'Destinations', 'Print Settings', 'Events', 'Scheduling Server Group', and 'Languages'. The right pane is titled 'Instance Title' and contains a text box with the value 'UA - Entity Brief Bio'.

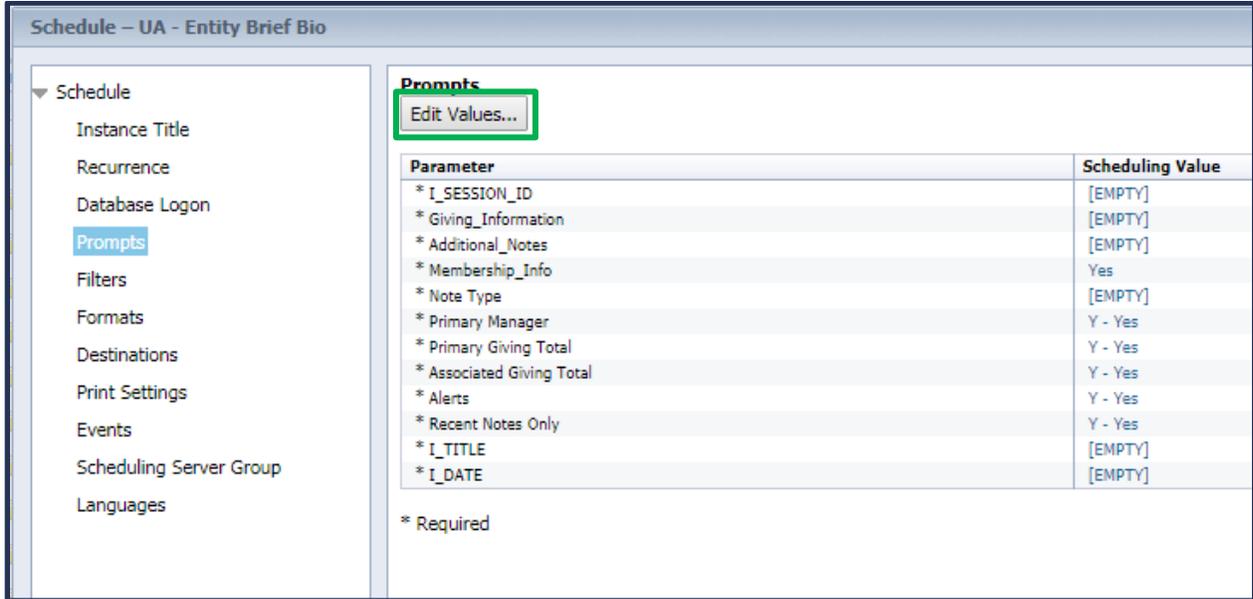
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21. Choose **Edit Values...** button.





Schedule - UA - Entity Brief Bio

▼ Schedule

- Instance Title
- Recurrence
- Database Logon
- Prompts**
- Filters
- Formats
- Destinations
- Print Settings
- Events
- Scheduling Server Group
- Languages

Prompts



Parameter	Scheduling Value
* I_SESSION_ID	[EMPTY]
* Giving_Information	[EMPTY]
* Additional_Notes	[EMPTY]
* Membership_Info	Yes
* Note Type	[EMPTY]
* Primary Manager	Y - Yes
* Primary Giving Total	Y - Yes
* Associated Giving Total	Y - Yes
* Alerts	Y - Yes
* Recent Notes Only	Y - Yes
* I_TITLE	[EMPTY]
* I_DATE	[EMPTY]

* Required

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22. Enter Session ID and set any other prompts that you'd like to change. (Some values may REQUIRE you to set them.)

Prompts

Enter prompt values.

I_SESSION_ID

Set to Null

Show Giving Information?

...

Add space for Additional Notes?

...

Show Membership Info?

...

Select Note Type

Available Values:

- 2009 Directory Project Story
- 2015 Directory Project Story
- AAA "Old" Matching Scholarship Notes
- Alumni Nomination
- ASCEND M8 Free Text
- General Allocation Information
- GG&A Notes
- Named Spaces

Selected Values:

Remove Remove All

Enter Primary Manager:

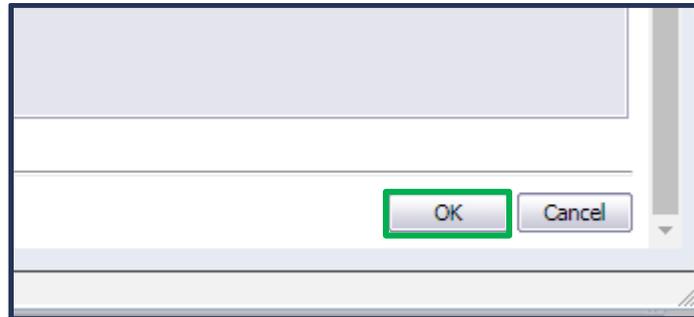
Y - Yes

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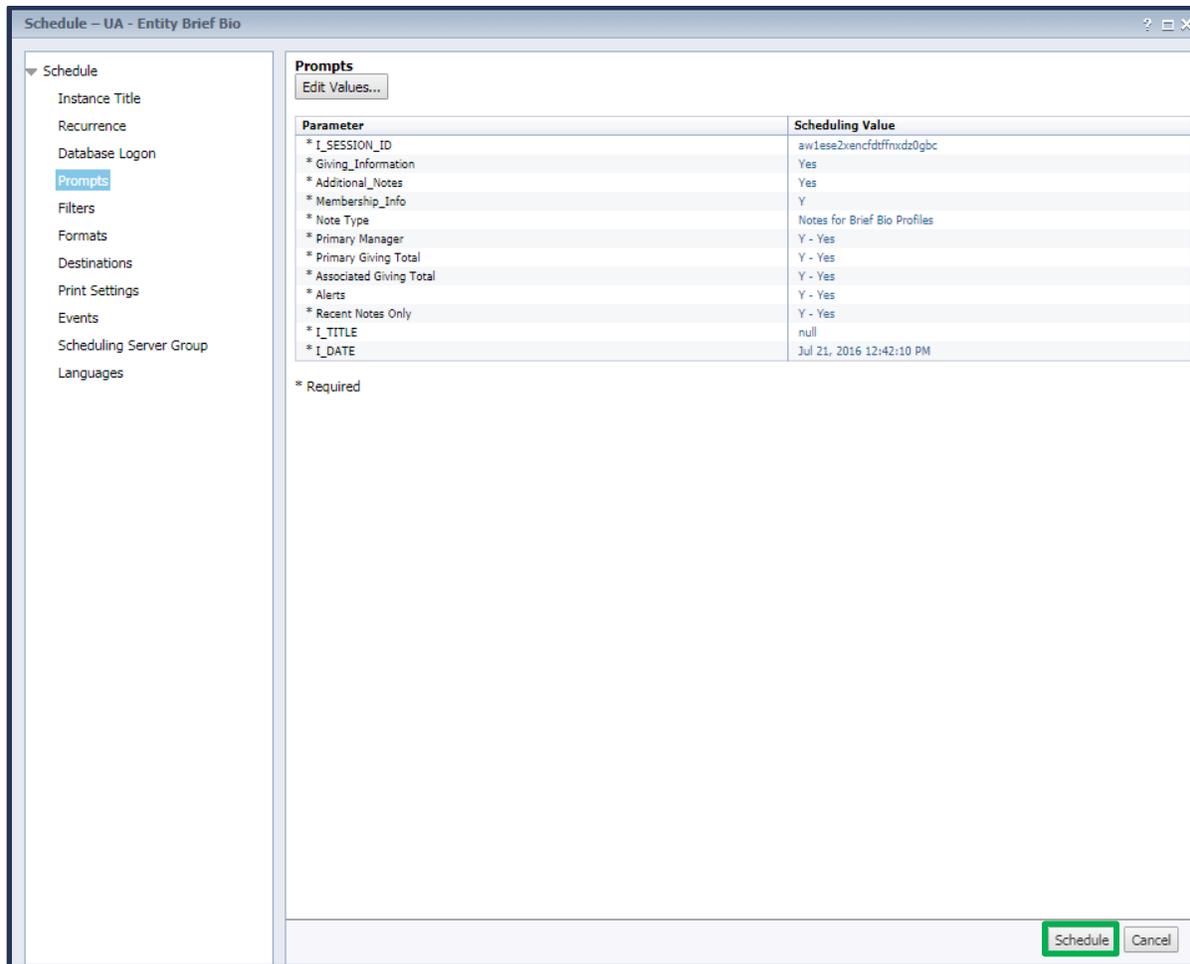
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23. Scroll to the bottom of the Prompts page and choose OK button when you are prepared.



24. Select the Schedule button on the bottom-right of the Schedule screen.

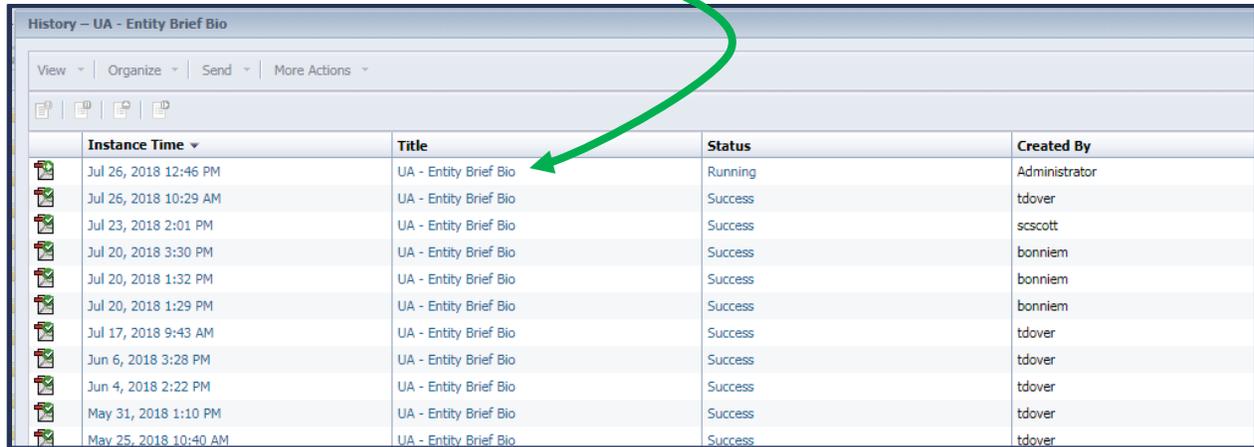


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25. Your History page will launch and show you the report Running. Wait until it reaches the Success stage. Here is my report running.



	Instance Time ▾	Title	Status	Created By
	Jul 26, 2018 12:46 PM	UA - Entity Brief Bio	Running	Administrator
	Jul 26, 2018 10:29 AM	UA - Entity Brief Bio	Success	tdover
	Jul 23, 2018 2:01 PM	UA - Entity Brief Bio	Success	scscott
	Jul 20, 2018 3:30 PM	UA - Entity Brief Bio	Success	bonniem
	Jul 20, 2018 1:32 PM	UA - Entity Brief Bio	Success	bonniem
	Jul 20, 2018 1:29 PM	UA - Entity Brief Bio	Success	bonniem
	Jul 17, 2018 9:43 AM	UA - Entity Brief Bio	Success	tdover
	Jun 6, 2018 3:28 PM	UA - Entity Brief Bio	Success	tdover
	Jun 4, 2018 2:22 PM	UA - Entity Brief Bio	Success	tdover
	May 31, 2018 1:10 PM	UA - Entity Brief Bio	Success	tdover
	May 25, 2018 10:40 AM	UA - Entity Brief Bio	Success	tdover

26. Double-click to open your report once it reads Success.

