

**V1.0 Release Notes:**

Release Date: 3/28/2007

1. No known compatibility issues at release date

- - - End v1.0 Notes - - -

**Description:**

SQL Report that extracts data needed to build a Fee Summary by School Calendar. The report defaults to the current school year but can be instructed to use historical calendars as well. It's grouped by UFARS account codes and sorted by 'Receipt Numbers'. This is a field that Infinite Campus designed for COMMENTS and will therefore hold non-numeric data so caution is advised to the end user to use ONLY receipt numbers for entry into this field when working in Campus. The report lists Account Numbers and Names. Organized within each account you'll see Receipt Numbers (sorted), Payment Date, Amount Paid and a column for Check Numbers or Cash payment method. Each account is subtotalled and there is a grand total for all payments at the end of the report. The report is ranged by setting a start date and end date. Multiple account selection is also featured in selection parameters.

**Instructions:**

**Navigate To The Report:** This report can be found in the Campus Index at: System Administration>Fee Summary. (Note: If you can't navigate to that location you'll need to see your district Campus contact to get Tool Rights granted.)

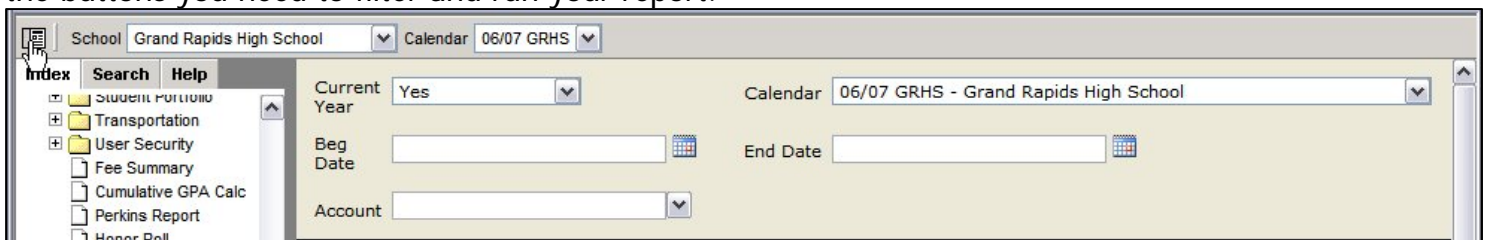
**User Login:** rs2005\stu#### (where #### is your 4-digit district number)

**Password:** use your ODBC reports password. If you don't know the password, contact your district rep for Infinite Campus.

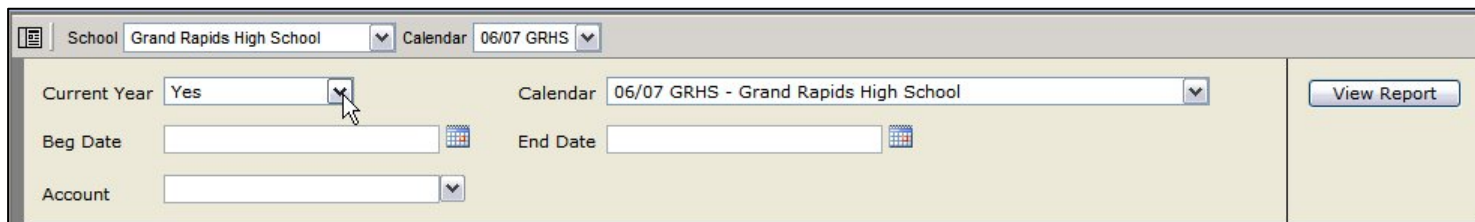


**Report Selection Criteria**

**Click the 'Toggle Outline' Button:** This 'turns off' the index and gives you more screen room to see all the buttons you need to filter and run your report.

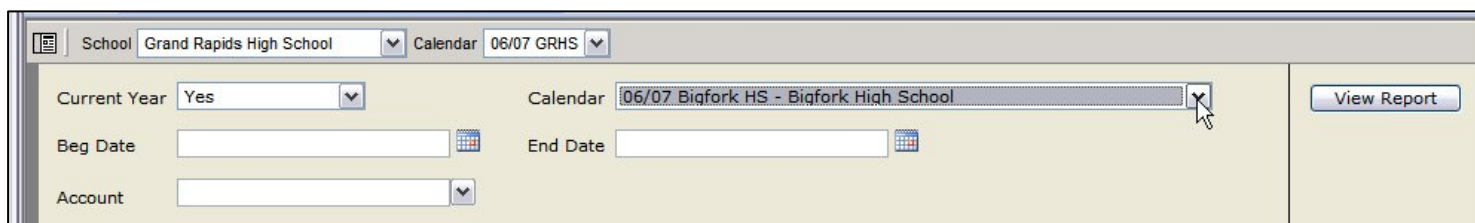


**Current Year:** (Defaults to 'Yes') Select your choice from the drop list. Selecting 'No' shows ALL school calendars.



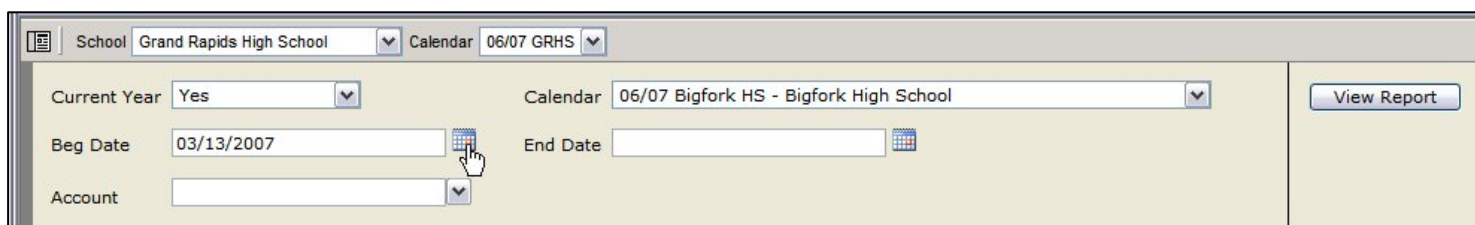
The screenshot shows the top section of the report form. At the top, there are two dropdown menus: 'School' set to 'Grand Rapids High School' and 'Calendar' set to '06/07 GRHS'. Below these, the 'Current Year' dropdown is set to 'Yes'. To its right, another 'Calendar' dropdown is set to '06/07 GRHS - Grand Rapids High School'. There are also empty text boxes for 'Beg Date' and 'End Date', and an 'Account' dropdown. A 'View Report' button is on the right.

**Calendar:** Select the desired Calendars. Multiple selections are supported, but restricted by Campus User Permissions.



This screenshot shows the 'Calendar' dropdown menu expanded, with '06/07 Bigfork HS - Bigfork High School' selected. The 'Current Year' remains 'Yes', and the 'Calendar' dropdown above it now shows '06/07 Bigfork HS - Bigfork High School'. Other fields are the same as in the previous screenshot.

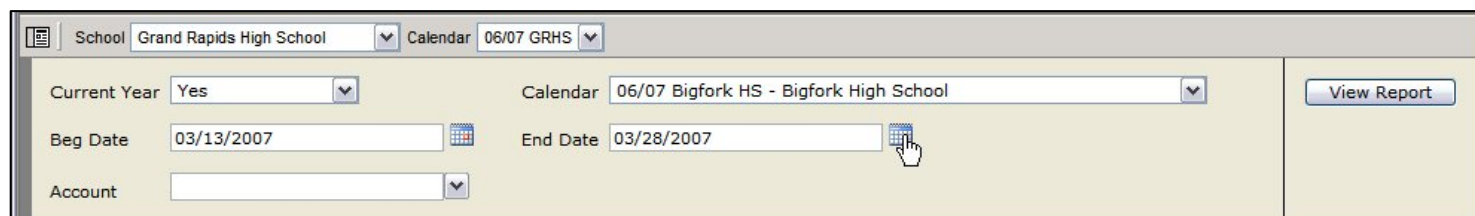
**Start Date:** Select an appropriate start date from the date field named 'Beg Date'. Either type in the



The 'Beg Date' field is now populated with '03/13/2007'. The 'Calendar' dropdown is still set to '06/07 Bigfork HS - Bigfork High School'. The 'Current Year' is 'Yes'. The 'End Date' field is still empty.

date using the date format m/d/yyyy, or select a date from the pop out calendar.

**End Date:** Select the appropriate end date from the date field named 'End Date'.



The 'End Date' field is now populated with '03/28/2007'. The 'Beg Date' remains '03/13/2007'. The 'Calendar' dropdown is still '06/07 Bigfork HS - Bigfork High School'. The 'Current Year' is 'Yes'.

**Account:** Select accounts to be included in your report as desired.

# Infinite Campus / SQL Reporting Services: **Fee Summary Report v1.0**

School: Grand Rapids High School | Calendar: 06/07 GRHS

Current Year: Yes | Calendar: 06/07 Bigfork HS - Bigfork High School

Beg Date: 03/13/2007 | End Date: 03/28/2007

Account: (Select All), Course, Activity

**View Report**

**View Report:** Click this button to generate the report.

School: Grand Rapids High School | Calendar: 06/07 GRHS

Current Year: Yes | Calendar: 06/07 Bigfork HS - Bigfork High School

Beg Date: 03/13/2007 | End Date: 03/28/2007

Account: Course, Activity, Enrollment, Fi

**View Report**

You should see a message indicating that the report is being generated...  
Your report will look similar to the illustration, below.

School: Grand Rapids High School | Calendar: 06/07 GRHS

Current Year: Yes | Calendar: 06/07 Bigfork HS - Bigfork High School

Beg Date: 3/13/2007 | End Date: 3/28/2007

Account: Course, Activity, Enrollment, Fi

of 0 | 100% | Find | Next | Select a format | Export

**Report is being generated**

# Infinite Campus / SQL Reporting Services: **Fee Summary Report v1.0**

If everything is working right, you should see a report similar to the illustration shown below.

**Fee Summary Report**

Account Number	Account Name	Receipt Number	Payment Date	Amount Paid	Chk Num
01-351-294-080-000-050	Activity	5561	03/26/2007	95.00	8454
		5567	03/26/2007	95.00	8460
		5568	03/27/2007	95.00	2593
		5569	03/27/2007	95.00	7482
		5570	03/27/2007	47.00	Cash
		met family fee cap/5565	03/26/2007	20.00	9479
	<b>Account Total</b>			<b>447.00</b>	
01-351-296-080-000-050	Activity	5562	03/26/2007	30.00	Cash
		5563	03/23/2007	95.00	7162
		5564	03/26/2007	90.00	4496
		5566	03/26/2007	95.00	13286
			<b>Account Total</b>		
<b>Grand Total</b>				<b>757.00</b>	

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## **Exporting Report to an External File**

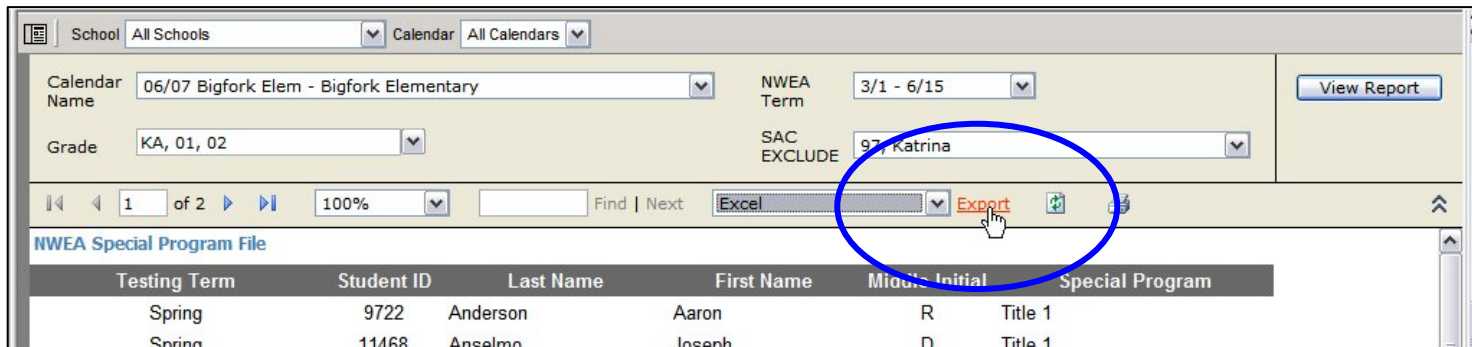
**\*\*\*Note:** Export instructions below are the same for ALL SQL Reports.

**Select a format:** This is where you determine the type of external file that will be extracted from your report. ARCC supports use of Microsoft Excel, so we advise to **select 'Excel' from the drop list**. If you decide to select a different file type, you'll be 'on your own' when it comes to file questions.

**NWEA Special Program File**

Testing Term	Student ID	Last Name	Initial	Special Program
Spring	9722	Anderson	Aar	Title 1
Spring	11468	Anselmo	Jose	Title 1
Spring	14644	Becker	Lexi	Free & Reduced

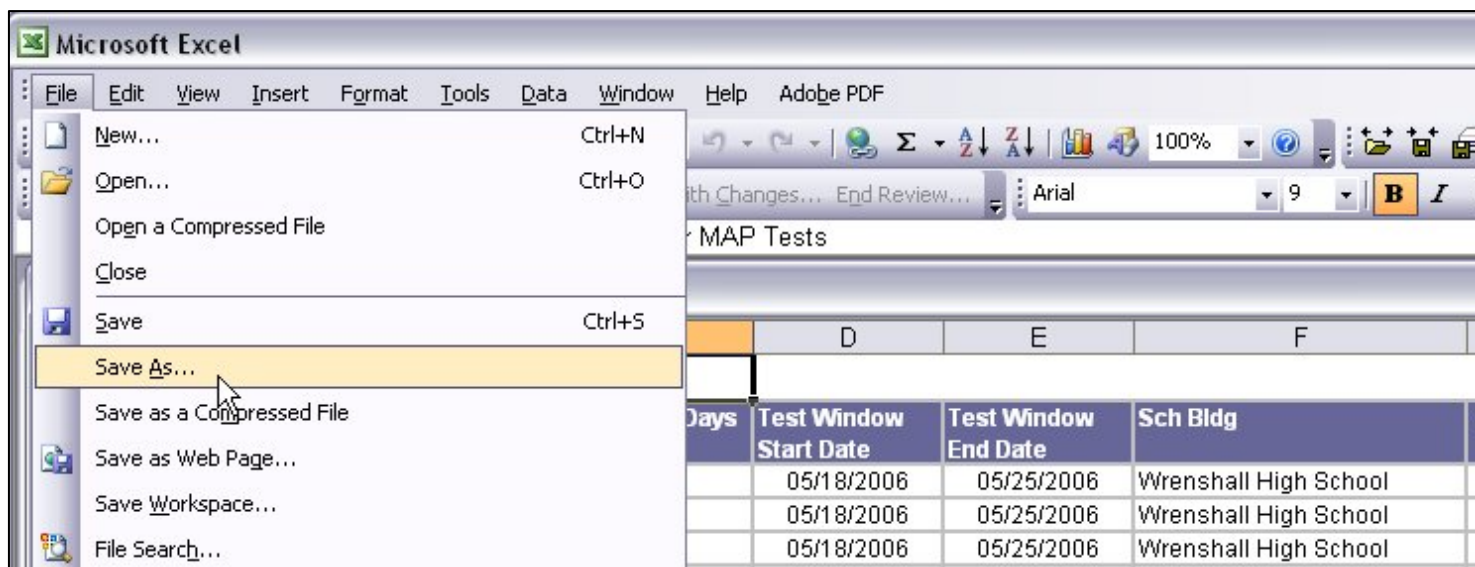
**Export:** Click on 'Export'



Select 'Open' from the popup window. The file should open into a Microsoft Excel worksheet.



Click on 'File', Select 'Save As': Be sure to give each building file a UNIQUE name!





Repeat the report process for each building as needed.

