

# UPAF Workplace Giving Site Company Administrator Instructions



To use the site as an administrator, log in with your username and password on the site's landing page. Please note, you must have administrative privileges to do so. If you do not, please reach out to your Campaign Leader.

UPAF  
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## Login

Username is your work email and password is your first name spelled backwards.

User Name:

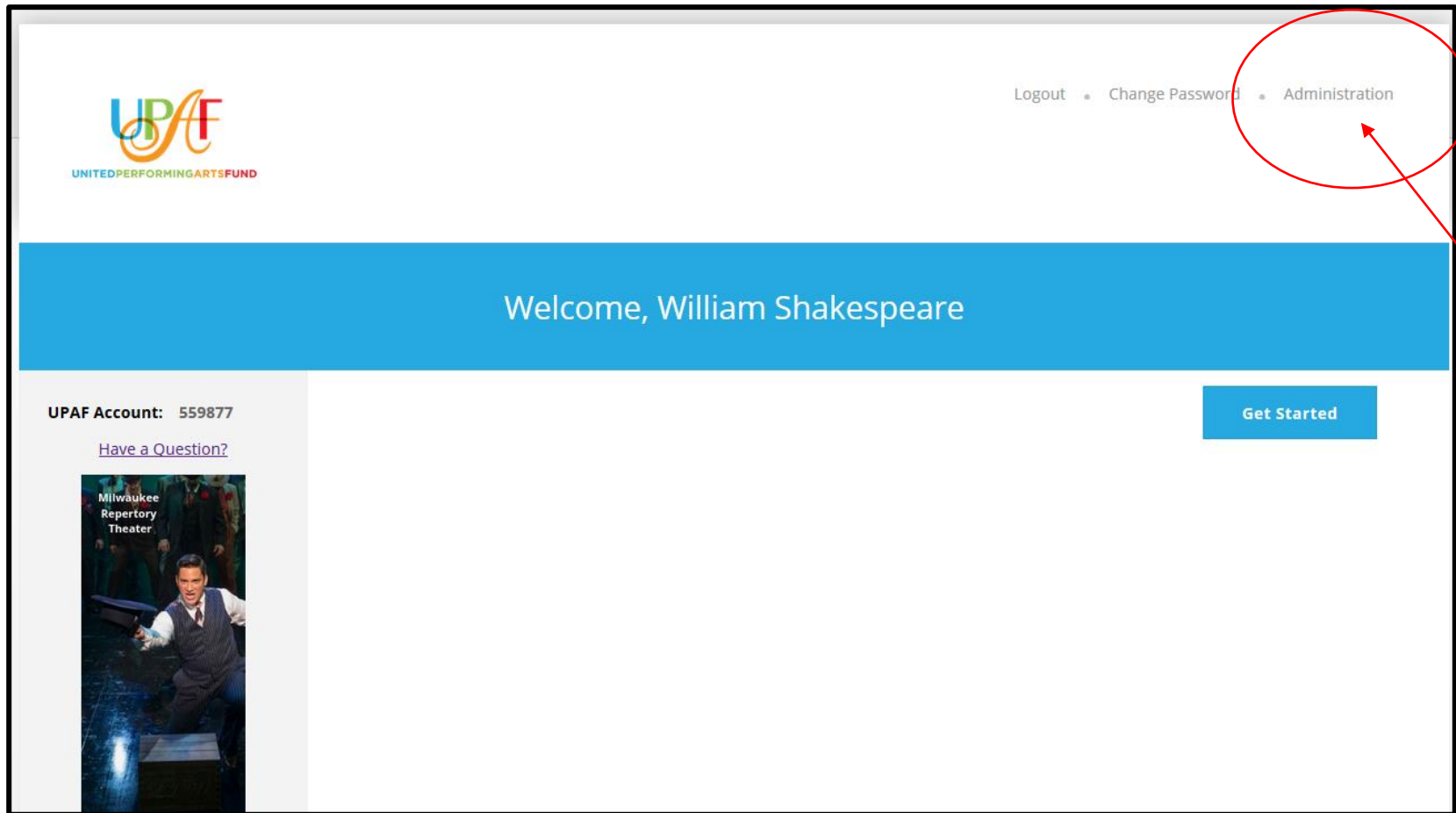
Password:

Login

[Forgot your password?](#)



Once logged in, click on Administration, as shown in the red circle below.



## In Administration there are three sections:

1. User Admin
2. Donations
3. Reporting

The next slides will explain the function of each section. Please note that for each section, Division, Department, and Location will be displayed if they've been provided in the employee file.

User Admin | Donations | Reporting

### User Search Criteria

Last Name:

User Name:

Division: --Select--

Department: --Select--

Location: --Select--

Only those who have yet to make a gift this year.

Sort By: LastName,FirstName



## User Admin – User Search Criteria Page

1. Search for users using the choices below to filter.
- OR
2. Search for all users by hitting submit.

|            |           |           |
|------------|-----------|-----------|
| User Admin | Donations | Reporting |
|------------|-----------|-----------|

### User Search Criteria

Last Name:

User Name:

Division:

Department:

Location:

Only those who have yet to make a gift this year.

Sort By:


## User Admin – User Search Results

1. Edit user record – Instructions on p. 7
2. Make donation on behalf of user – Instructions on p. 8
3. Export spreadsheet of
  - +Visible Users - those you can see on the screen) or
  - +All Returned Users – all users returned in search results

Please email [eg\\_administrators@upaf.org](mailto:eg_administrators@upaf.org) for assistance with:

1. Send email to users
2. Add a new user

### User Search Results

 (1 to 3 of 3 matches)

| Name                 | Username      | Division | Department | Location | Action(s)  |
|----------------------|---------------|----------|------------|----------|--|
| Capulet, Juliet      | julietcapulet | Drama    | Tragedy    | Italy    | <a href="#">Edit</a> <a href="#">Make Donation</a> |
| Montague, Romeo      | romeomontague | Drama    | Tragedy    | Italy    | <a href="#">Edit</a> <a href="#">Make Donation</a> |
| Shakespeare, William | wshakespeare  | Drama    | Comedy     | England  | <a href="#">Edit</a> <a href="#">Make Donation</a> |

End of (1 to 3 of 3 matches)

Options

Export:

Export

Send Mail

## User Admin - Add/Modify UPAF Site User Information

Use this page to update user info and to assist users with password issues.

1. Change password – Click Set Password, enter new password, and click Save at the bottom.
2. Reset login attempts to 0 – Once a user has 5 failed login attempts, they will be locked out.
3. Update email, division, department, or location

### Add/Modify UPAF Site User Information

First Name: **Juliet**  
Last Name: **Capulet**  
Login ID: **jcapulet**

Password: \*

**Set Password**

Confirm Password: \*

Note: Passwords must be at least 6 characters in length. Passwords must contain at least one number.

Failed Login Attempts:

(Failures since last successful login. Set to 0 to reset suspended account. Max allowed failures before suspension is 5)

Status: \* Active

Email: \*

Division:

Department:

Location:



## User Admin – Make donation on behalf of a user

1. Click OK and then you will be taken to the donation landing page.
2. Click Get Started to go through the regular donation process as your colleague. If you do not have your colleague's email address, please use the manager's email address. Once you have submitted the pledge, the email confirmation will be sent to the entered email address.

The screenshot shows a web application interface with a grey header containing the UPAF logo and links for 'Logout' and 'Change Password'. A dark blue navigation bar includes a 'Reporting' tab. A white modal dialog box is centered on the screen, displaying the text: 'You will be making a donation on behalf of Juliet Capulet. Do you wish to proceed?' with 'OK' and 'Cancel' buttons. Below the dialog, a table lists users with columns for Username, Division, Department, Location, and an 'Action' column containing 'Edit' links. The table is titled '(1 to 3 of 3 matches)'.

| Username     | Division  | Department | Location | Action               |
|--------------|-----------|------------|----------|----------------------|
| jcapulet     | Character | Tragedy    | Italy    | <a href="#">Edit</a> |
| rmontague    | Character | Tragedy    | Italy    | <a href="#">Edit</a> |
| wshakespeare | Writer    | Tragedy    | England  | <a href="#">Edit</a> |



## Donations – Donation Search Criteria

Search for users using the choices below to filter, then click Submit.



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### Donation Search Criteria

Last Name:

User Name:

Division:

Department:

Location:

Pay Type:   
Cash  
Check  
Credit Card one-time

Show:  
 All Donors Who Gave This Year  
 All Non-Donors Who Gave Last Year  
 All New Donors Compared to Last Year  
 All Increased Donors Compared to Last Year  
 All Employees Donation Report  
 All Employee Payroll Gifts This Year

Sort By:

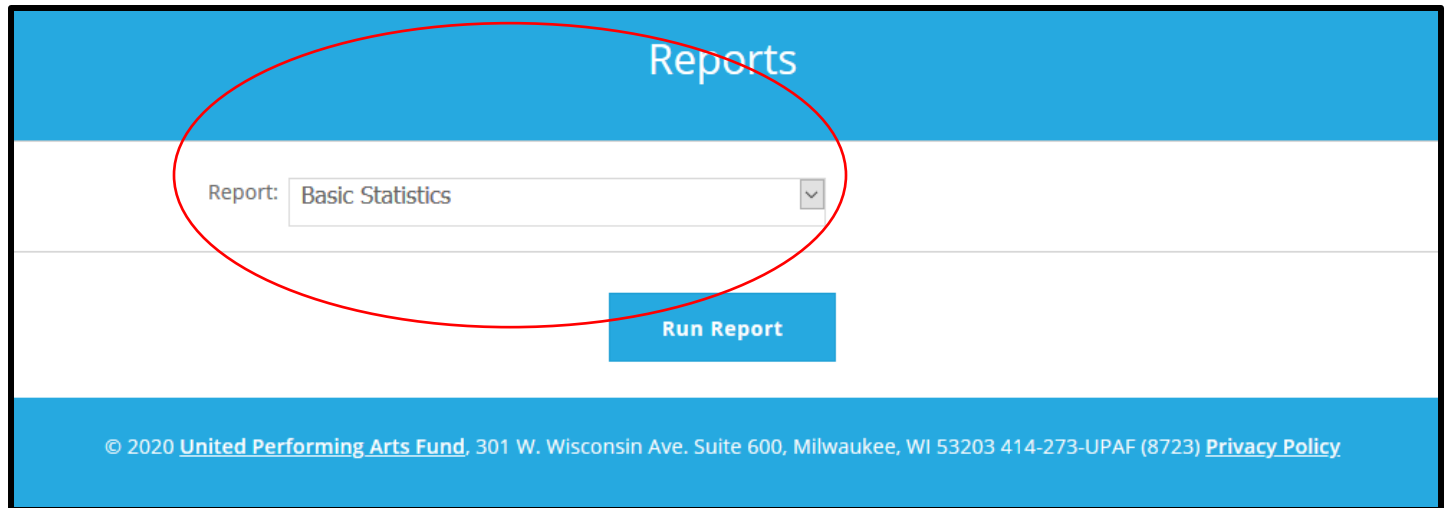
## Donations - Donation reports results

1. Gift Amount is total amount. If recurring payroll deduction is chosen, please divide total gift amount by number of pay periods to determine amount to be deducted per paycheck.
2. Gift Date and Time is in Eastern Standard Time, so it is an hour ahead of CST.
3. All reports can be exported as a spreadsheet (.xlsx is default format).
4. Gifts refresh every half an hour.

| User Admin             | Donations     | Reporting  | All Donors Who Gave This Year |          |            |          |                    |                                |                 |                 |                   |
|------------------------|---------------|------------|-------------------------------|----------|------------|----------|--------------------|--------------------------------|-----------------|-----------------|-------------------|
| <a href="#">Export</a> |               |            |                               |          |            |          |                    |                                |                 |                 |                   |
| (1 to 2 of 2 matches)  |               |            |                               |          |            |          |                    |                                |                 |                 |                   |
| Name                   | Username      | Employeeid | Email Address                 | Division | Department | Location | Contribution Type  | Check or CC Transaction Number | Amount          | Previous Amount | Gift Date (EST)   |
| Capulet, Juliet        | julietcapulet | 2345       | julietcapulet@tragedy.com     | Drama    | Tragedy    | Italy    | Check              | 1234                           | \$20.20         | 0               | 02/04/20 12:02 PM |
| Montague, Romeo        | romeomontague |            | romeomontague@tragedy.com     | Drama    | Tragedy    | Italy    | Payroll, recurring |                                | \$100.10        | 0               | 02/04/20 12:00 PM |
| <b>Total:</b>          |               |            |                               |          |            |          |                    |                                | <b>\$120.30</b> |                 |                   |

## Reporting - Reports

1. Select desired report from dropdown and select Run Report.
2. Reports:
  - a. Basic Statistics: Cumulative employee donation report
  - b. Division, Department, or Location Statistics: # of Active Employees, # of Givers, % of Participation, \$ Pledged, and that group's % of Total \$ raised in the entire company
  - c. Division / Department Statistics: Reports by Departments within Divisions
  - d. Donation Summary By Pay Type: Reports cumulative gifts by contribution type
  - e. Donation Summary By Pay Type and Donor Type: Cumulative gifts by UPAF Donor Levels within pay types.
  - f. Administrative Log: Shows all users and whether or not they've donated.



The screenshot displays a web interface for generating reports. At the top, a blue header contains the word "Reports". Below this, a white form area features a dropdown menu labeled "Report:" with "Basic Statistics" selected. A red oval highlights the dropdown menu and the "Run Report" button, which is a blue rectangular button with white text. At the bottom of the interface, a blue footer contains the copyright information: "© 2020 United Performing Arts Fund, 301 W. Wisconsin Ave. Suite 600, Milwaukee, WI 53203 414-273-UPAF (8723) [Privacy Policy](#)".



# Questions?

Please email [eg\\_administrators@upaf.org](mailto:eg_administrators@upaf.org)

