Login

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.
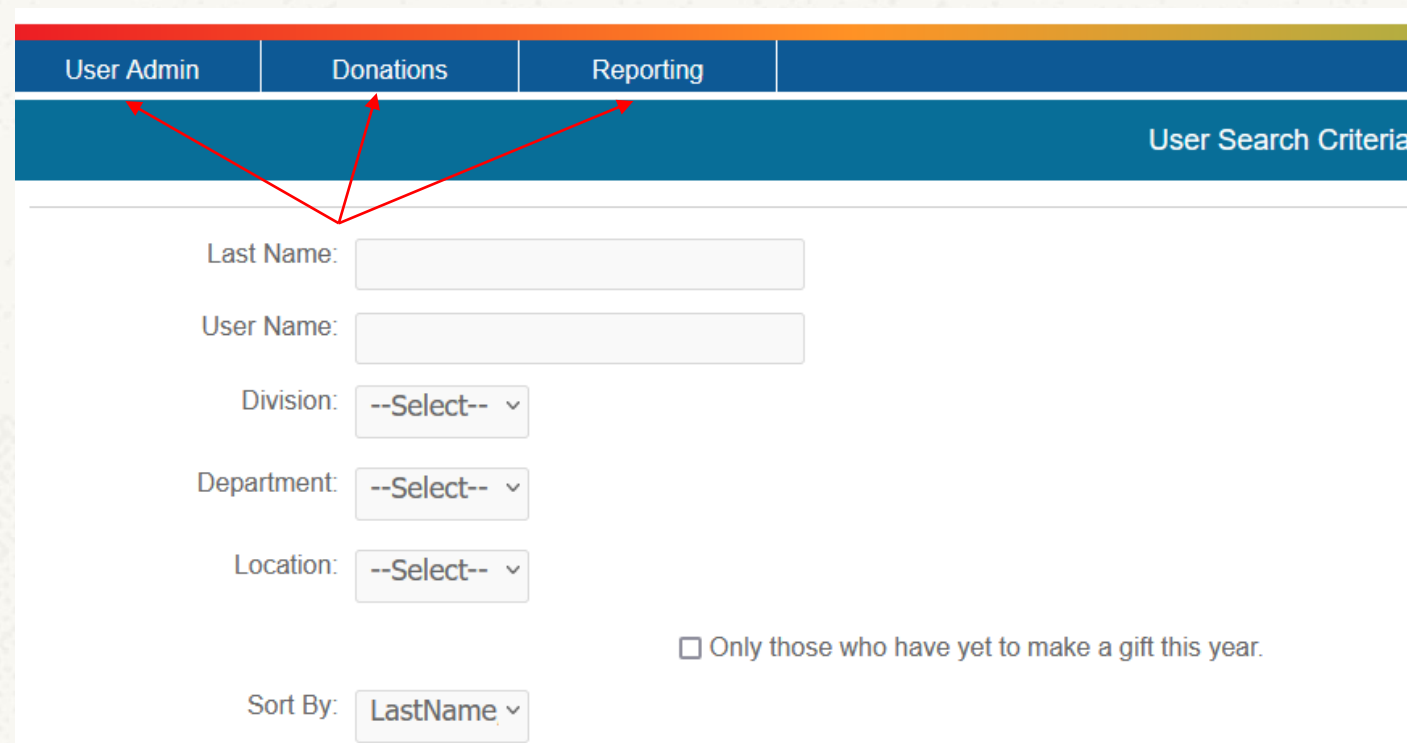
Landing Page

Welcome, William Shakespeare

GET STARTED »

This is where the greeting letter goes.

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

Administration

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 – User Search Criteria

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

User Admin – User Search Results

From this page you can:

1. Edit user record – instructions later in deck
2. Make donation on behalf of user – instructions later in deck
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 for assistance with:

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

User Admin – Edit User

Use this page to update user info and to assist users with password issues. Remember to click 'Save'.

1. Change password – Click Set Password, enter new password, and confirm password
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: julietcapulet@tragedy.com
Password: * [   ] **Set Password**
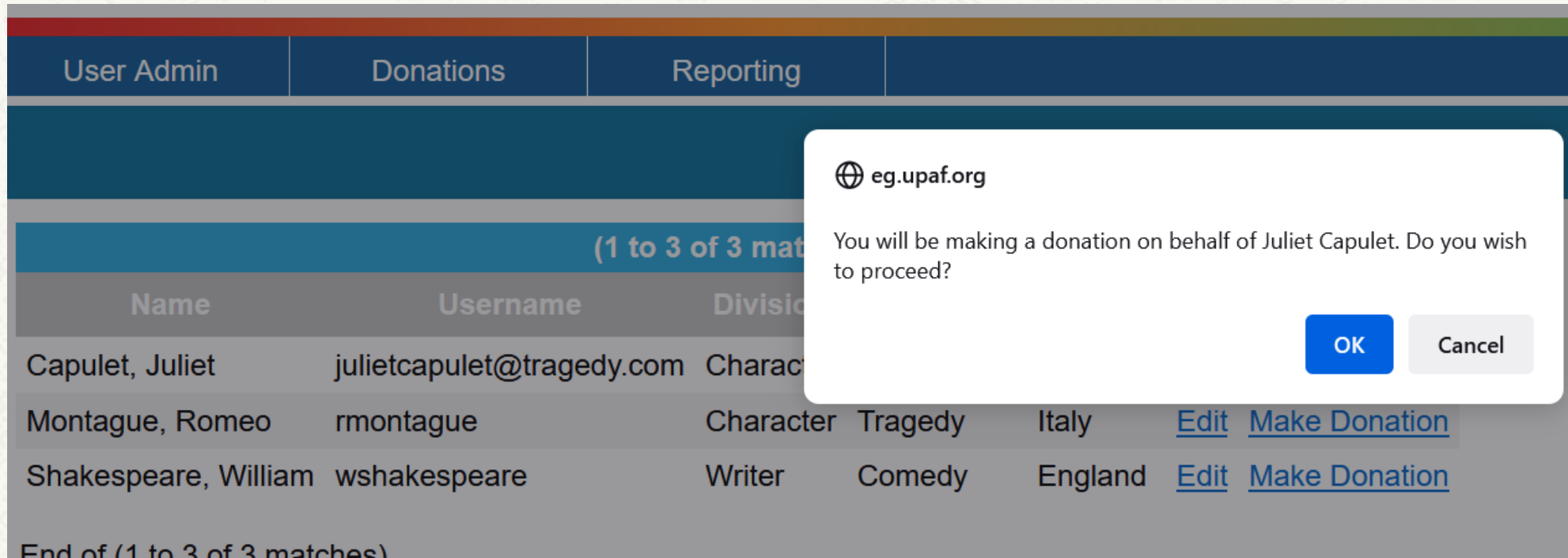Confirm Password: * [   ]

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

Failed Login Attempts: [0]

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

Status: * [Active ▼]

Email: * [julietcapulet@tragedy.com]
Division: [Character]
Department: [Tragedy]
Location: [Italy]

COMPANY GROUPS

Group	User Roles For Group

United Performing Arts Fund Affiliated Groups

☑ UPAF All Users   ☐ Group Administrator
                    ☑ Standard Group Member

SAVE

User Admin – Donate on behalf of user

1. Click OK and then you will be taken to that user's donation landing page.
2. Click Get Started to go through the regular donation process as your colleague. If their email address is provided, then the contribution confirmation will be sent there.

Donations – Donation Search Criteria

Search for users using the different choices to filter, then click Submit.
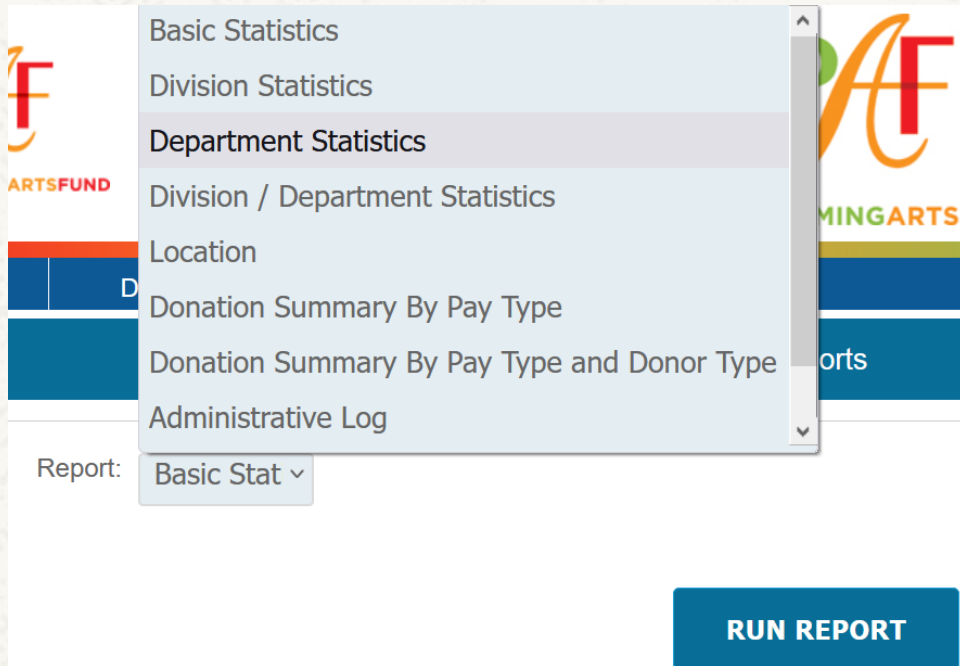
Donations – Donation Search Results

EXPORT

(1 to 1 of 1 matches)

Name	Username	EmployeeId	Email Address	Division	Department	Location	Contribution Type	Check or CC Transaction Number	Total Amount	Previous Total Amount	Gift Date (ET)
Capulet, Juliet	julietcapulet@tragedy.com	2345	julietcapulet@tragedy.com	Character	Tragedy	Italy	Payroll, recurring		$500.01	0	01/28/22 12:51 PM
								Total:	**$500.01**		

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/Time is in Eastern Time, so it is an hour ahead of Central Time.
3. All reports can be exported as a spreadsheet (.xlsx is default format).
4. Gifts refresh every half an hour.

Reporting

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 they've donated.

Questions?

Please email
eg_administrators@upaf.org