



# Login



UNITEPERFORMINGARTSFUND

UNITEPERFORMINGARTSFUND

Login

**Username:** UPAF email

**Password:** upaf2021

You will be prompted to set a new password upon first login.

User Name:

Password:

**LOGIN >**

[Forgot your password?](#)

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



[Logout](#) • [Administration](#) • [Change Password](#)

Welcome, William Shakespeare

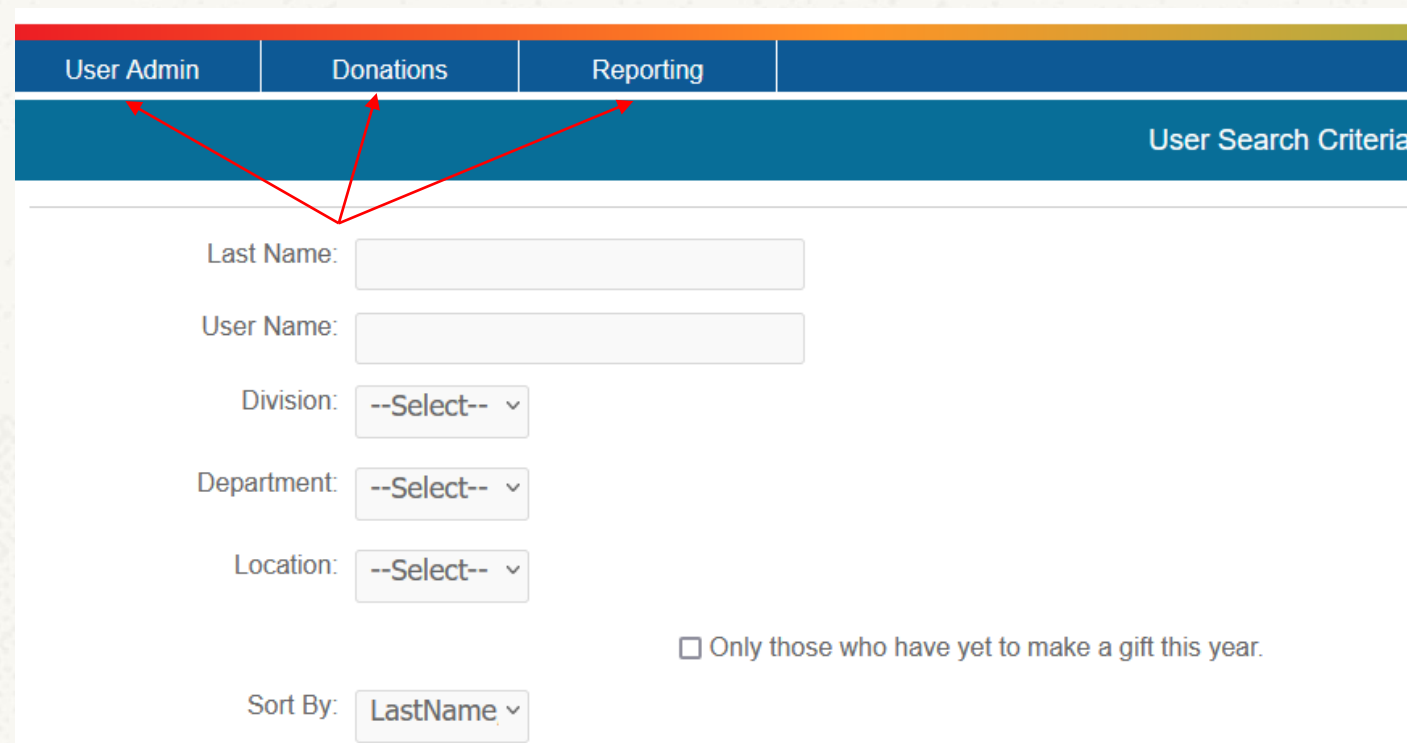
[GET STARTED »](#)

This is where the greeting letter goes.

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



# Administration



The screenshot displays the Administration interface. At the top, there is a navigation bar with three tabs: "User Admin", "Donations", and "Reporting". Below the navigation bar is a "User Search Criteria" section. This section contains several input fields: "Last Name:" with a text box, "User Name:" with a text box, "Division:" with a dropdown menu showing "--Select--", "Department:" with a dropdown menu showing "--Select--", and "Location:" with a dropdown menu showing "--Select--". There is also a checkbox labeled "Only those who have yet to make a gift this year." and a "Sort By:" dropdown menu currently set to "LastName". Three red arrows point from the "User Search Criteria" section to the "User Admin", "Donations", and "Reporting" tabs.

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

User Search Criteria

Last Name:

User Name:

Division:

Department:

Location:

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

Sort By:

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](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@tragedy.com	Character	Tragedy	Italy	<a href="#">Edit</a> <a href="#">Make Donation</a>
Montague, Romeo	rmontague	Character	Tragedy	Italy	<a href="#">Edit</a> <a href="#">Make Donation</a>
Shakespeare, William	wshakespeare	Writer	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 – 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

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First Name: Juliet  
Last Name: Capulet  
Login ID: julietcapulet@tragedy.com  
Password: \*    
Confirm Password: \*

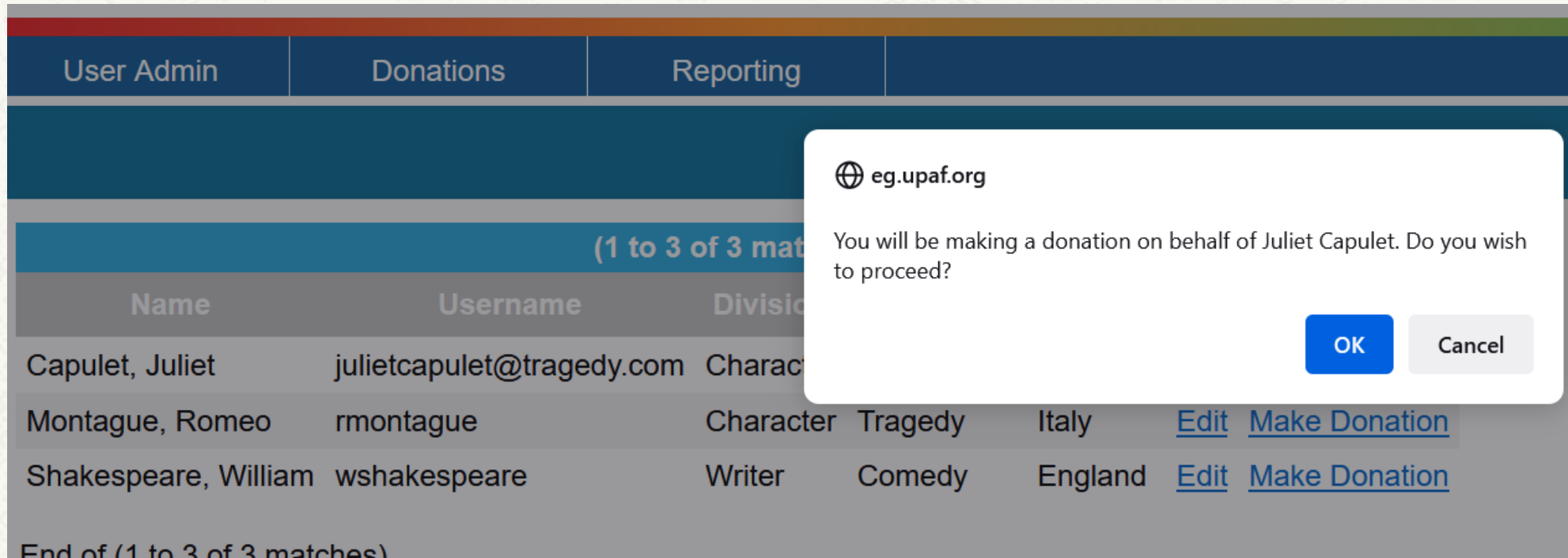
Note: Passwords must be at least 6 characters in length. Passwords must contain at least one number.

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

Status: \*    
Email: \*   
Division:   
Department:   
Location:

COMPANY GROUPS	
Group	User Roles For Group
<i>United Performing Arts Fund Affiliated Groups</i>	
<input checked="" type="checkbox"/> UPAF All Users	<input type="checkbox"/> Group Administrator <input checked="" type="checkbox"/> Standard Group Member

# User Admin – Donate on behalf of user



The screenshot shows a web application interface with a navigation bar containing 'User Admin', 'Donations', and 'Reporting'. Below the navigation bar is a table with columns for 'Name', 'Username', and 'Division'. A modal dialog box is overlaid on the table, displaying a globe icon and the text 'eg.upaf.org'. The dialog asks, 'You will be making a donation on behalf of Juliet Capulet. Do you wish to proceed?' and has 'OK' and 'Cancel' buttons.

Name	Username	Division
Capulet, Juliet	julietcapulet@tragedy.com	Character
Montague, Romeo	rmontague	Character
Shakespeare, William	wshakespeare	Writer

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

Donation Search Criteria

Last Name:

User Name:

Division:

Department:

Location:

Pay Type:   
Cash  
CC Sustai  
Check

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:

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





# Donations – Donation Search Results

All Donors Who Gave This Year

EXPORT

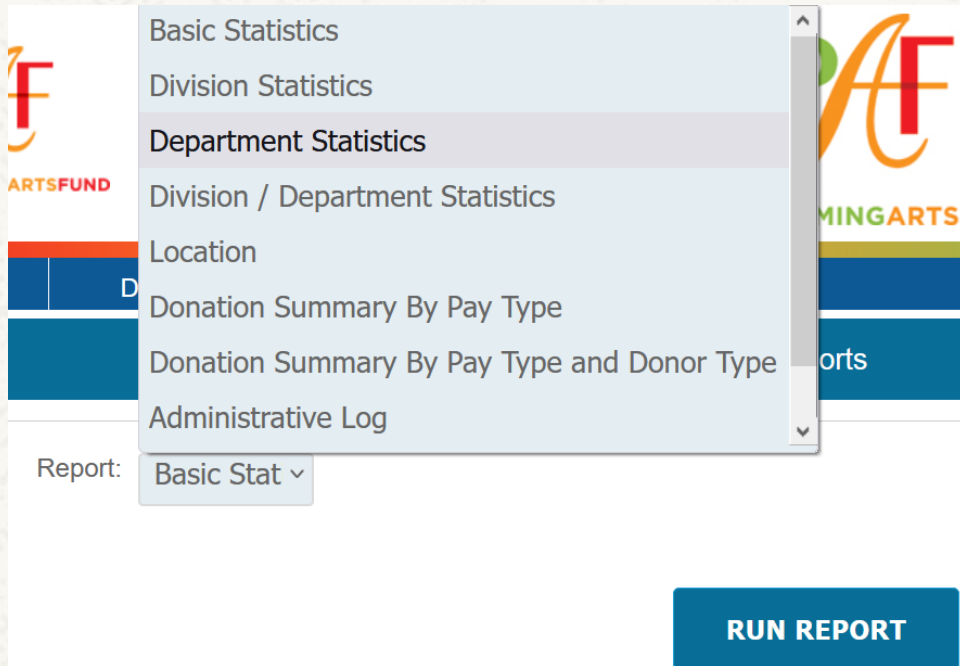
(1 to 1 of 1 matches)

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
<b>Total:</b>									<b>\$500.01</b>		

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



The screenshot shows a web interface for generating reports. On the left, there is a vertical navigation bar with the 'ARTSFUND' logo and a sidebar menu with items like 'D' and 'ports'. The main content area features a dropdown menu with the following options: 'Basic Statistics', 'Division Statistics', 'Department Statistics', 'Division / Department Statistics', 'Location', 'Donation Summary By Pay Type', 'Donation Summary By Pay Type and Donor Type', and 'Administrative Log'. Below the dropdown, a 'Report:' label is followed by a small dropdown menu currently showing 'Basic Stat'. At the bottom right of the interface is a prominent blue button labeled 'RUN REPORT'.

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**

