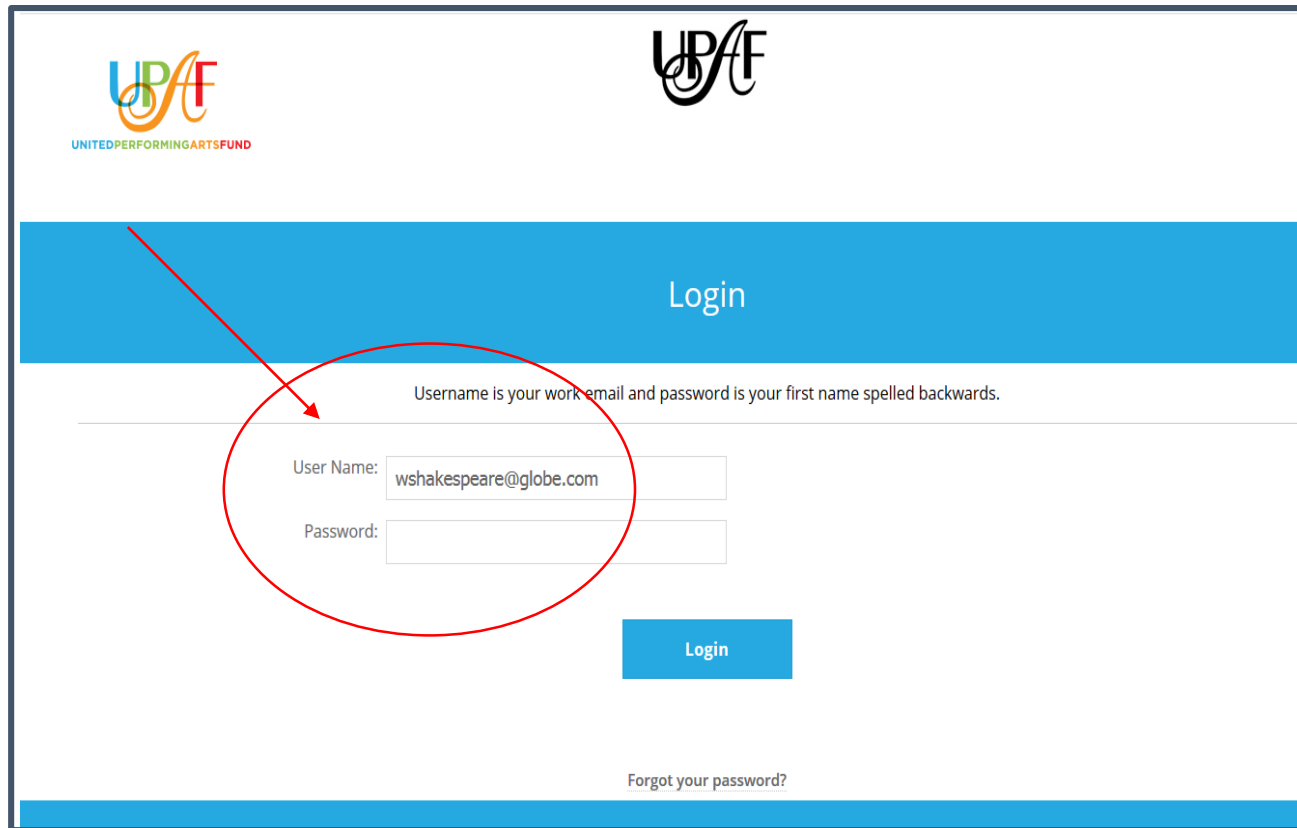


UPAF Workplace Giving Site Company Administrator Instructions



To use the site as an administrator, log in with your user name 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.



The screenshot shows the UPAF (United Performing Arts Fund) login page. At the top left is the UPAF logo with the text "UNITED PERFORMING ARTS FUND" below it. At the top right is a stylized "UPAF" logo. A blue banner across the middle contains the word "Login" in white. Below the banner, a red circle highlights the login fields. An arrow points from the top left of the circle to the "User Name:" label. The "User Name:" field contains the email "wshakespeare@globe.com". The "Password:" field is empty. Below the fields is a blue "Login" button. At the bottom, there is a link that says "Forgot your password?".

UPAF
UNITED PERFORMING ARTS FUND

UPAF

Login

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

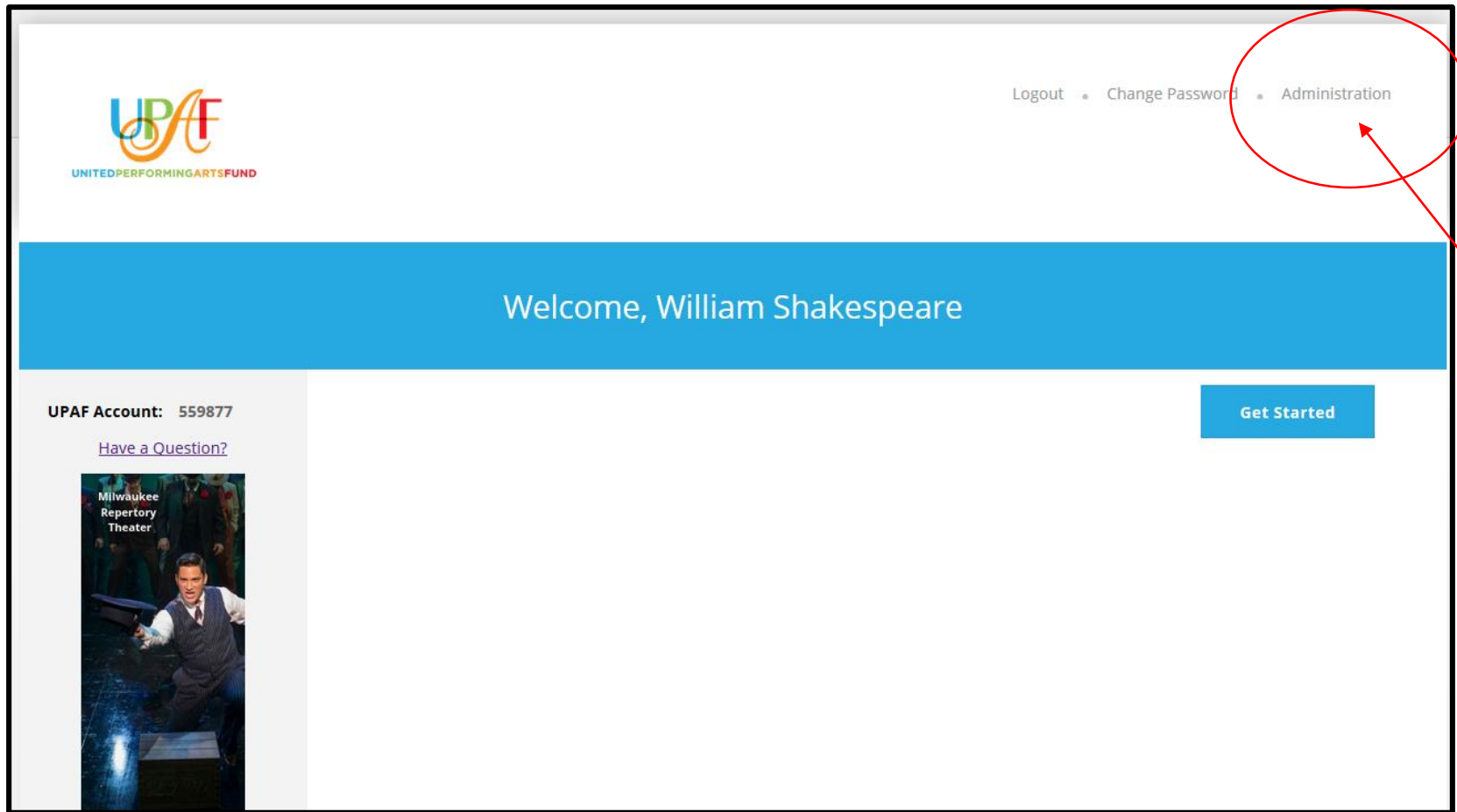
User Name: wshakespeare@globe.com

Password:

Login

[Forgot your password?](#)

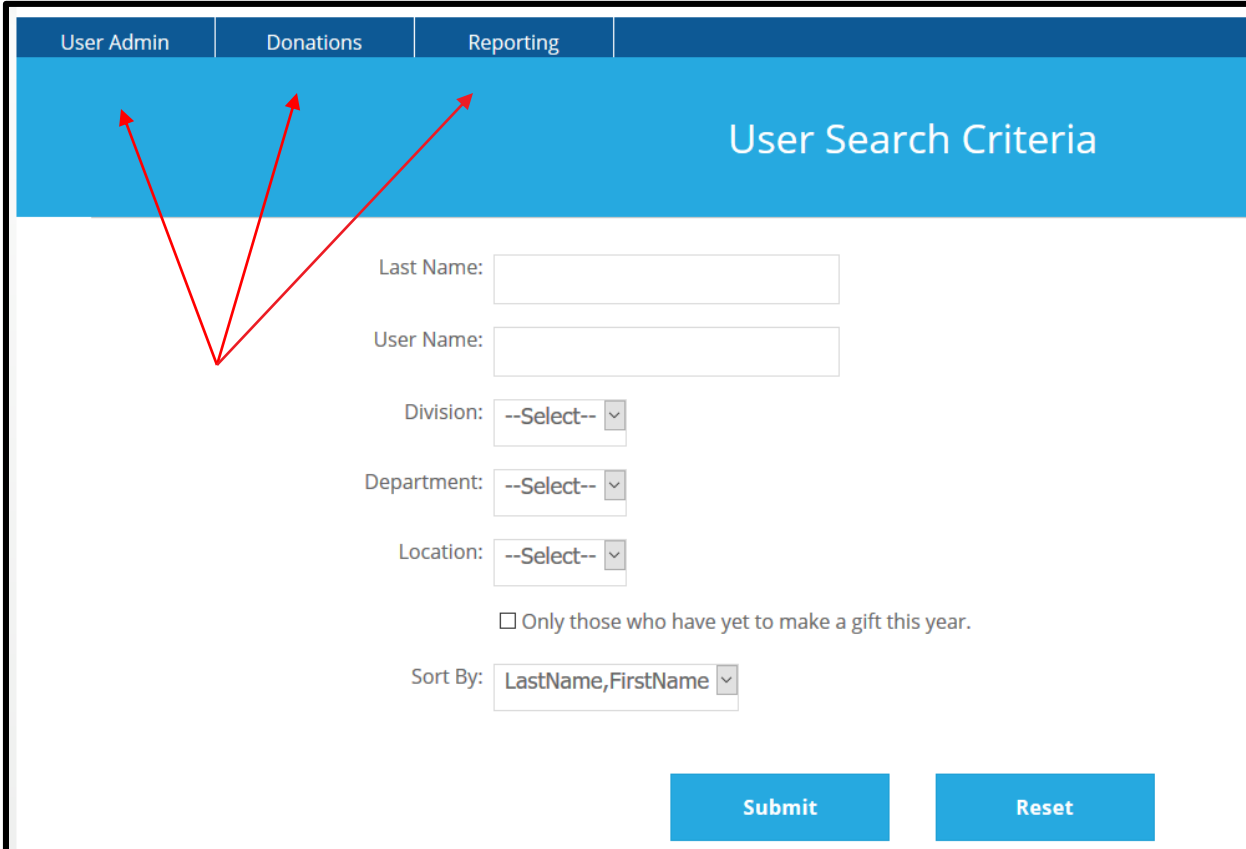
Once logged in, click on Administration, as shown in the red circle below.



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.



The screenshot shows a web application interface with a navigation bar at the top containing three tabs: "User Admin", "Donations", and "Reporting". Below the navigation bar is a large blue header area with the text "User Search Criteria". Three red arrows originate from a single point on the left and point to each of the three navigation tabs. The main content area contains a search form with the following fields:

- Last Name:
- User Name:
- Division:
- Department:
- Location:
- ☐ Only those who have yet to make a gift this year.
- Sort By:

At the bottom right of the form are two blue buttons: "Submit" and "Reset".

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
<h3>User Search Criteria</h3>		
Last Name: <input type="text"/>		
User Name: <input type="text"/>		
Division: <input type="text" value="--Select--"/>		
Department: <input type="text" value="--Select--"/>		
Location: <input type="text" value="--Select--"/>		
<input type="checkbox"/> Only those who have yet to make a gift this year.		
Sort By: <input type="text" value="LastName,FirstName"/>		
<input type="button" value="Submit"/>		<input type="button" value="Reset"/>

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 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	julietaulet	Drama	Tragedy	Italy	Edit	Make Donation
Montague, Romeo	romeomontague	Drama	Tragedy	Italy	Edit	Make Donation
Shakespeare, William	wshakespeare	Drama	Comedy	England	Edit	Make Donation

End of (1 to 3 of 3 matches)

Options

Export: Visible Users

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: **jcapiulet**
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 displays the UPAF User Admin interface. At the top, the UPAF logo is centered, with 'Logout' and 'Change Password' links to the right. A dark blue navigation bar contains a 'Reporting' tab. A white confirmation dialog box is overlaid in the center, asking: '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 the heading '(1 to 3 of 3 matches)'. The table has columns for Username, Division, Department, Location, and an 'Action' column with 'Edit' links. The users listed are jcapulet, rmontague, and wshakespeare.

Username	Division	Department	Location	Action
jcapulet	Character	Tragedy	Italy	Edit
rmontague	Character	Tragedy	Italy	Edit
wshakespeare	Writer	Tragedy	England	Edit

Donations – Donation Search Criteria

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



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 AdminDonationsReporting

All Donors Who Gave This Year

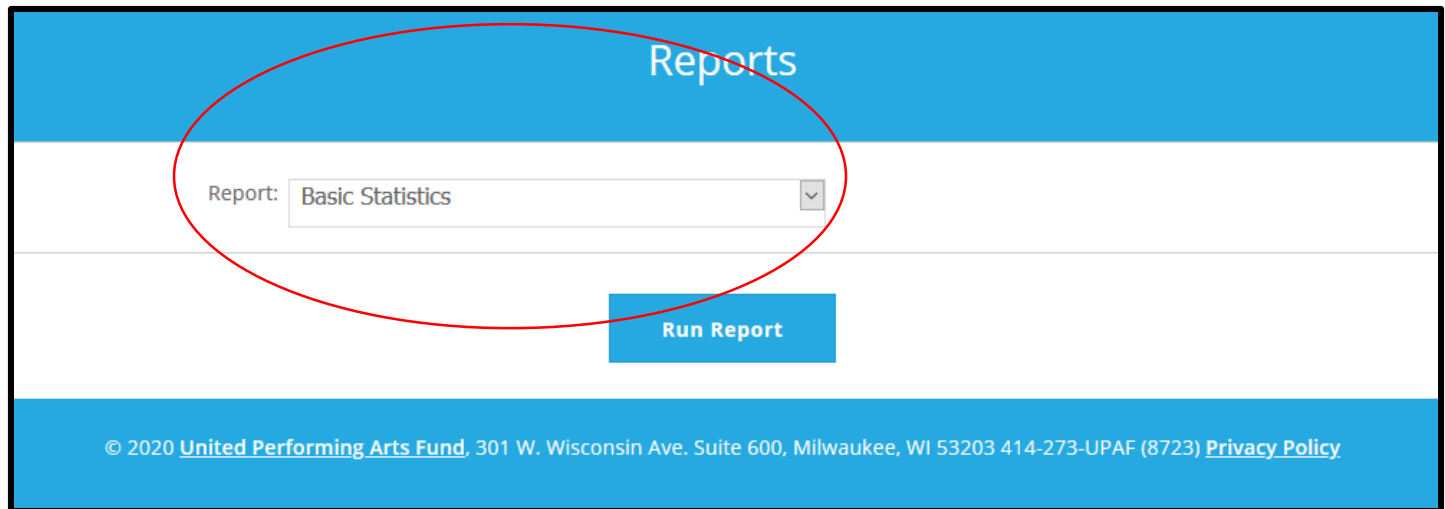
Export

(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
								Total:	\$120.30		

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.



Reports

Report: Basic Statistics ▼

Run Report

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Questions?

Please email eg_administrators@upaf.org

