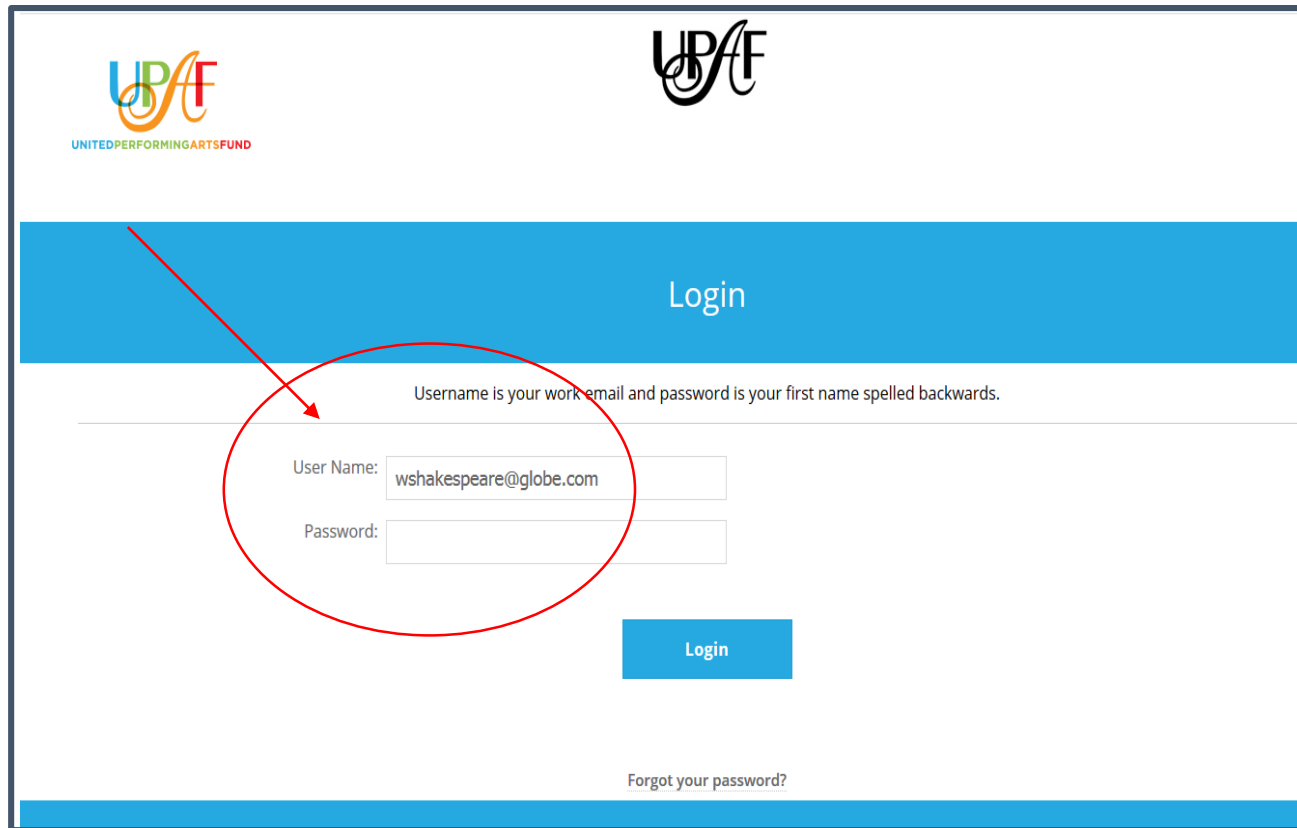# UPAF Workplace Giving Site Company Administrator Instructions

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.
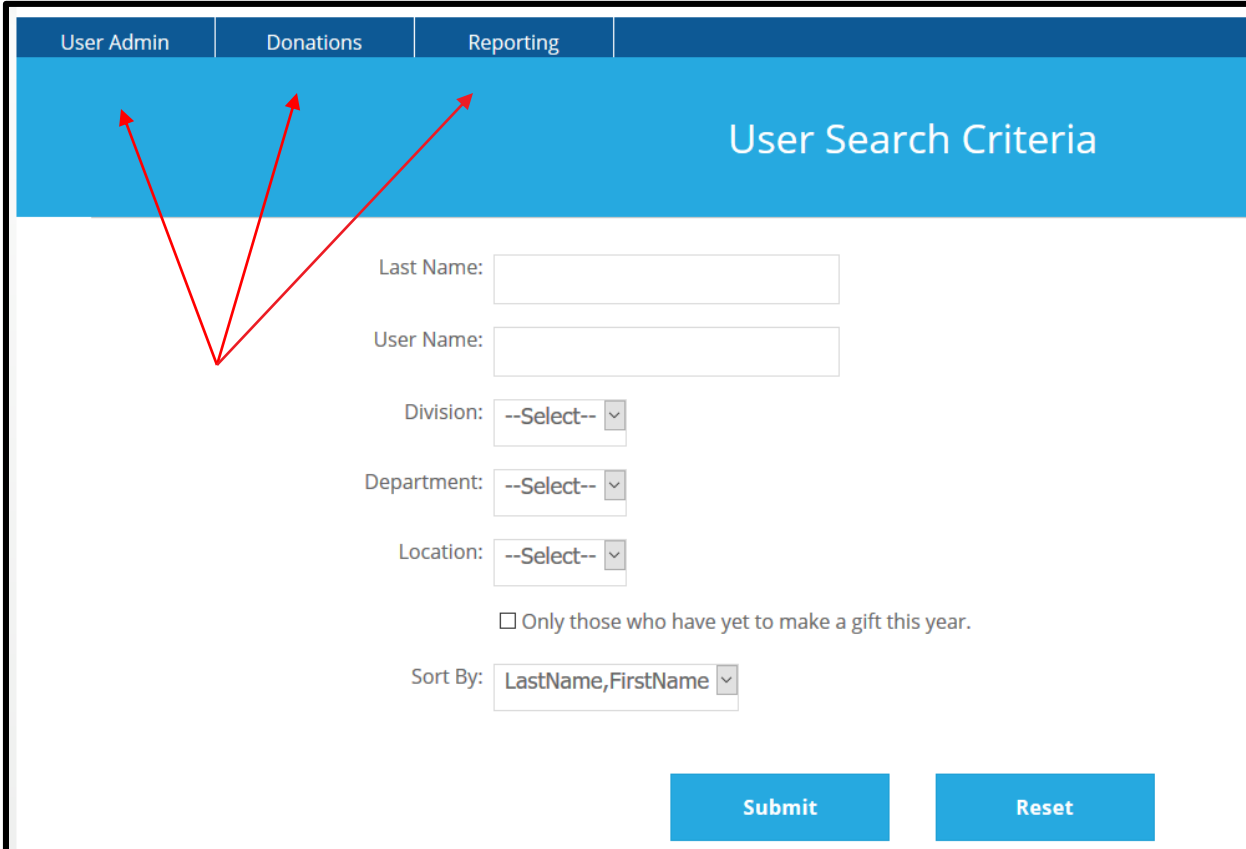
Once logged in, click on Administration, as shown in the red circle below.
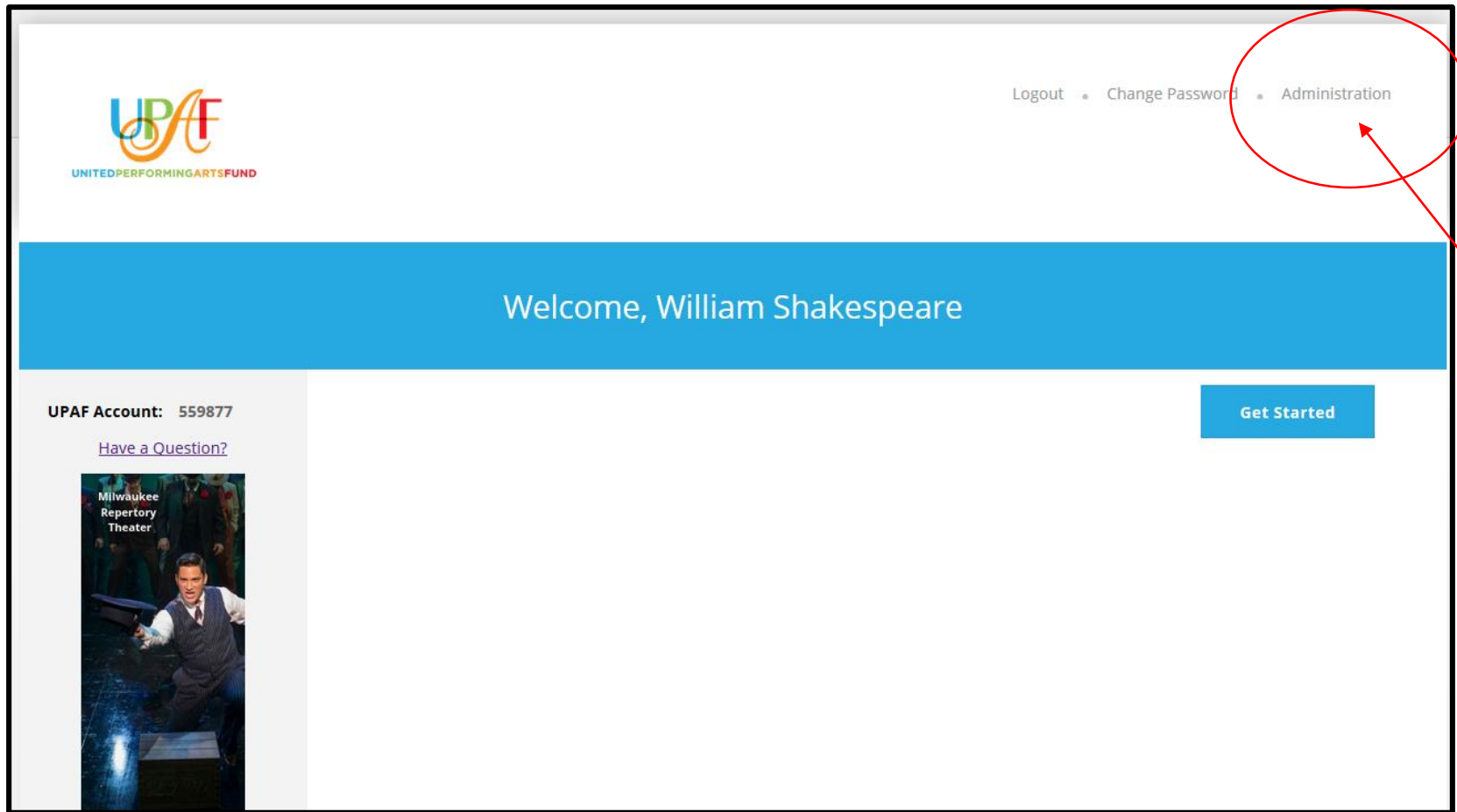
In Administration there are three sections:
1. User Admin
2. Donations
3. Reporting

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 – 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: [--Select-- ▾]

Department: [--Select-- ▾]

Location: [--Select-- ▾]

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

Sort By: [LastName,FirstName ▾]

Submit   **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	julietcapulet	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: **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: [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]

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.

Donations – Donation Search Criteria

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

Donation Search Criteria

Last Name: [   ]

User Name: [   ]

Division: [--Select-- ▾]

Department: [--Select-- ▾]

Location: [--Select-- ▾]

Pay Type:
```
--ALL--
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: [LastName,FirstName ▾]

[**Submit**]   [**Reset**]

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.

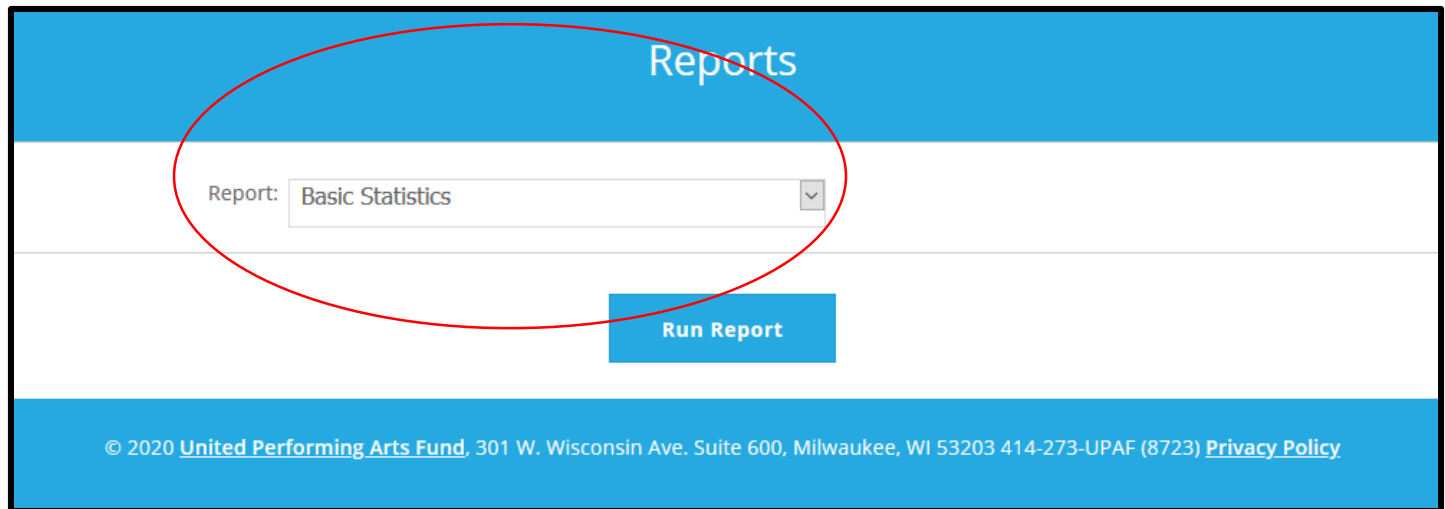| User Admin	Donations	Reporting	

All Donors Who Gave This Year

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		

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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.

Questions?

Please email eg_administrators@upaf.org