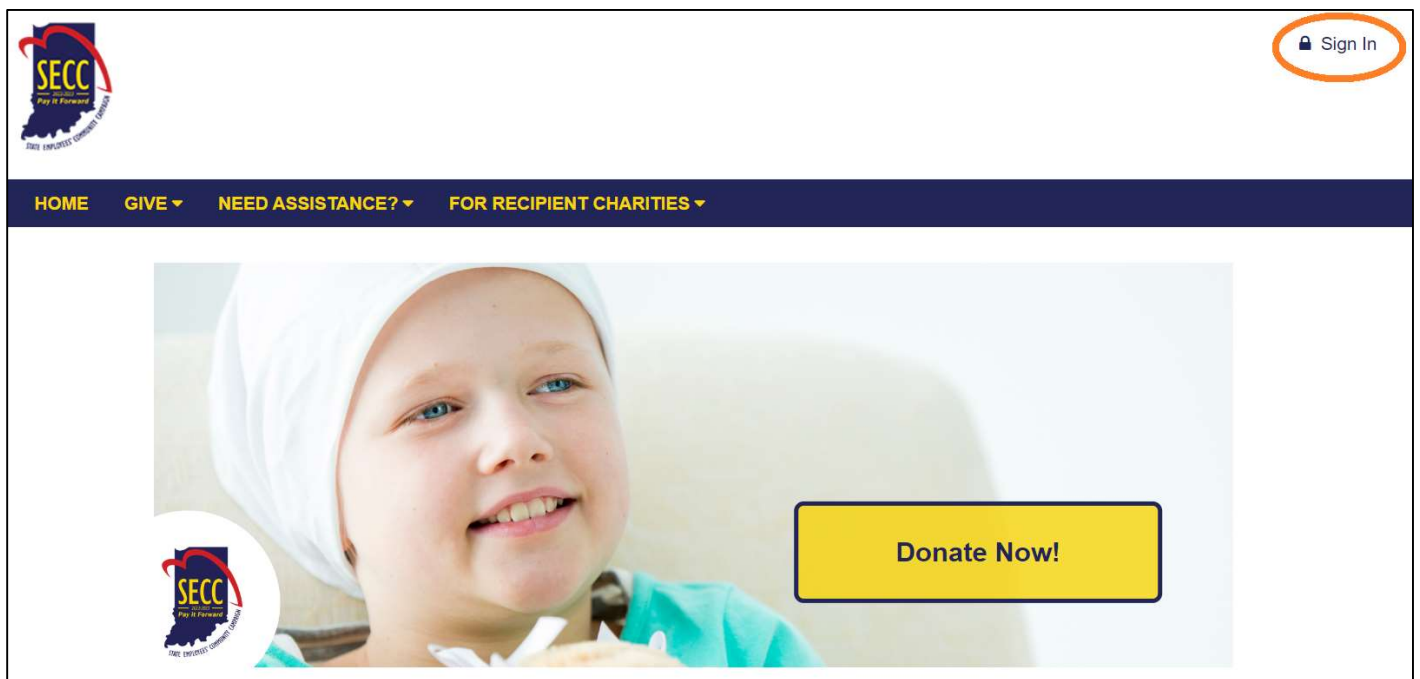


To begin, visit your portal site.

Step One:

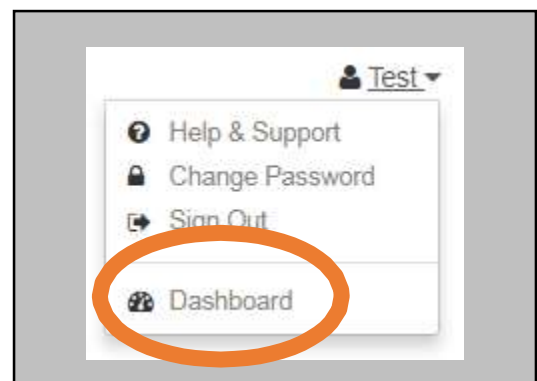
Click “Sign in” from the top right corner and log in using the same credentials that you would use to pledge.

As a campaign coordinator, you have the ability to view reports for your department.



Step Two:

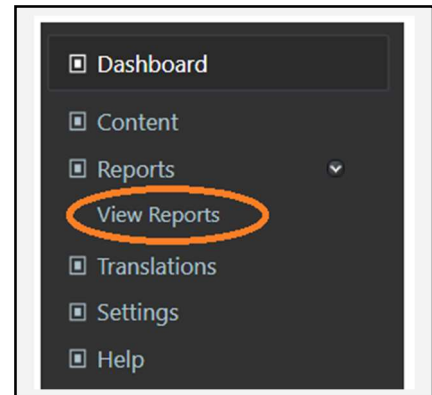
Click on your username in the top right corner and navigate to “Dashboard” from the drop-down menu.



Step Three

Navigate to Dashboard > Reports

Then, click "View Reports"



Step Four

A list of available reports will appear on the screen.

Portal Reports - Choose the report you wish to view. User: C2345 | Logout

Report Name	Description	Actions
Business Unit Summary	Summary of Business Unit Data by the selected level(s)	Run
Business Unit Summary with Response Status	Summary of Business Unit Data with Employee Response Status detail	Run
Business Unit Summary with Respondents & Gift Amounts	Summary of Business Unit data with respondents and gift amount detail	Run

Select "Run" for the report you would like to pull.

Select the Campaign Period for which you would like to see contributions made by your department's employees. Although all departments are listed, your access as campaign coordinator will only show contributions made by your department employees. Select "View Report" or "Save Report."

Select either a campaign period or a campaign below:

Campaign Period
2022

Campaign
Choose a campaign...

Company Summary:
No

Filter Member List:
Non Respondents

Selection:
BusinessUnit1

Sub-Selection:
Herritage Trails Corr
Hoosier Letters
House of Representatives
Housing & Community Development Authority

Account:
State of Indiana

Employment Status
All

View Report Save Report CSV



Step Five: View Report

Business Unit Summary Report

Business Unit Summary Report Data As Of: 8/17/2022 10:27:00 AM

#Emp	Curr # Resp	Curr % Resp	Outstanding Givers	Prev Total Gift	Prev # Givers	Prev % Part	Prev Avg Gift	Prev Per Emp	\$ Change Diff	% Change Diff	Curr Total Gift	Curr #Givers	New Givers	Curr % Part	Curr Avg Gift	Curr Per Emp	#Opt Out	Opt Out %	Goal Amount	% Goal Amount	Goal Participation	% Goal Participation
House of Representatives																						
188	3	1.6%	0	\$600.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$600.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				
Totals																						
188	3	1.6%	0	\$600.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$600.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				

Column	Description
Current Respondents	No of employees who have participated (given or logged in)
Current Response Rate	No of employees who have participated by %
Previous Total Gift	Previous year's total contribution amount
Previous No of Givers	Previous year's no of givers
Previous % Part	Previous year's participation rate
Previous Avg Gift	Previous year's average gift amount
Previous Per Emp	Per capita gift amount
\$ Change Diff	Dollar difference previous year vs. current year
% Change Diff	Percent gift amount difference previous year vs. current year
Curr Total Gift	Current contribution amount raised
Curr No of Givers	Current no of employees who have given
Current % Part	Current year's participation rate
Current Avg Gift	Current year's average gift amount
Current Per Emp	Per capita gift amount
Current % Part	Current year's participation rate



Step Six: View Report

Business Unit Response No Response:

Includes list of employees who have not made a contribution for the current year

Business Unit Response No Response

Data As Of: 8/17/2022 10:31:02 AM

Page 1

Organization Name: America's Charities

#Emp	Curr # Resp	Curr % Resp	Outstanding Givers	Prev Total Gift	Prev # Givers	Prev % Part	Prev Avg Gift	Prev Per Emp	\$ Change Diff	% Change Diff	Curr Total Gift	Curr #Givers	New Givers	Curr % Part	Curr Avg Gift	Curr Per Emp	#Opt Out	Opt Out %	Goal Amount	% Goal Amount	Goal Participation	% Goal Participation
House of Representatives																						
188	3	1.6%	0	\$500.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$500.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				
Totals																						
188	3	1.6%	0	\$500.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$500.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				

Last Name	First Name	Middle	Business Unit 1	Business Unit 2	Business Unit 3	Email Address
Aasen	Adam	Patrick	House of Representatives	House of Representatives		
Abbott	David	Harrell	House of Representatives	House of Representatives		
Alvarez	Andrew		House of Representatives	House of Representatives		
Amor	Veda	Auburn	House of Representatives	House of Representatives		
Andrade	Miguel	A	House of Representatives	House of Representatives		

Column	Description
Current Respondents	No of employees who have participated (given or logged in)
Current Response Rate	No of employees who have participated by %
Previous Total Gift	Previous year's total contribution amount
Previous No of Givers	Previous year's no of givers
Previous % Part	Previous year's participation rate
Previous Avg Gift	Previous year's average gift amount
Previous Per Emp	Per capita gift amount
\$ Change Diff	Dollar difference previous year vs. current year
% Change Diff	Percent gift amount difference previous year vs. current year
Curr Total Gift	Current contribution amount raised
Curr No of Givers	Current no of employees who have given
Current % Part	Current year's participation rate
Current Avg Gift	Current year's average gift amount
Current Per Emp	Per capita gift amount
Current % Part	Current year's participation rate



Step Seven: View Report

Business Unit Summary with Respondents & Gift Amounts:

Includes list of employees who have made contributions for the current year

Business Unit Summary with Respondents & Gift Amounts

Data As Of: 8/17/2022 11:07:42 AM

Page 1

Organization Name: America's Charities

#Emp	Curr # Resp	Curr % Resp	Outstanding Givers	Prev Total Gift	Prev # Givers	Prev % Part	Prev Avg Gift	Prev Per Emp	\$ Change Diff	% Change Diff	Curr Total Gift	Curr #Givers	New Givers	Curr % Part	Curr Avg Gift	Curr Per Emp	#Opt Out	Opt Out %	Goal Amount	% Goal Amount	Goal Participation	% Goal Participation
House of Representatives																						
188	3	1.6%	0	\$600.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$600.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				
Totals																						
188	3	1.6%	0	\$600.00	3	1.6%	\$200.00	\$3.19	\$0.00	0.0%	\$600.00	3	0	1.6%	\$200.00	\$3.19	0	0.0%				

Last Name	First Name	Middle	Business Unit 1	Business Unit 2	Business Unit 3	Email Address	Amount
Cortez	Christina	Tester	House of Representatives	House of Representatives		ccortez@charities.org	\$200.00
Marx	Becky	Tester	House of Representatives	House of Representatives		bmarx@charities.org	\$100.00
Smith	Alysia	Tester	House of Representatives	House of Representatives		asmith@charities.org	\$300.00

Column	Description
Current Respondents	No of employees who have participated (given or logged in)
Current Response Rate	No of employees who have participated by %
Previous Total Gift	Previous year's total contribution amount
Previous No of Givers	Previous year's no of givers
Previous % Part	Previous year's participation rate
Previous Avg Gift	Previous year's average gift amount
Previous Per Emp	Per capita gift amount
\$ Change Diff	Dollar difference previous year vs. current year
% Change Diff	Percent gift amount difference previous year vs. current year
Curr Total Gift	Current contribution amount raised
Curr No of Givers	Current no of employees who have given
Current % Part	Current year's participation rate
Current Avg Gift	Current year's average gift amount
Current Per Emp	Per capita gift amount
Current % Part	Current year's participation rate