

On-Line Charity Reporting: **User Guide**

You could make a
world of difference



On-Line Charity Reporting: User Guide

Welcome to Charitable Giving's Charity On-Line Reporting facility.

The facility is easy to use and designed to allow you to manage your report files, downloading as necessary as well as archiving and/or un-archiving/deleting files as required. Details of how to do this are set out in this User Guide. Good luck.

1. To access reports for your charity, first go to www.charitablegiving.co.uk and then:

The screenshot shows the Charitable Giving homepage. At the top right, there are links for 'Contact us' and 'User Login'. A blue callout bubble with a white border points to the 'User Login' link, containing the text 'Click on the User Login link'. The main content area features a carousel of images, including one for 'Macmillan Cancer' and another for 'So that's how you do it!'. Below the carousel is a section titled '3 ways to give' with sub-sections for 'Payroll Giving', 'Options Vouchers', and 'Every Penny Helps'. At the bottom left, there is a 'News' section with a date of 'March 2010' and a headline 'Who administers your employer's Payroll Giving scheme?'. At the bottom right, there is a section for '@ PayrollGiving@YourEmployer' with a question mark icon and the text 'Does Charitable Giving administer your employer's Payroll Giving Scheme? Then, donate or join now. Or find out here.'

2. At the On-Line User Login screen:

The screenshot shows the 'On-Line User Login' screen. At the top right, there are links for 'Contact us' and 'User Login'. A blue callout bubble with a white border points to the 'Login' button, containing the text 'Enter Email Address and Password, and then click on the [Login] button'. The main content area has a heading 'On-Line User Login' and a sub-heading 'If you are a registered on-line user, login using your Email address and Password below:'. Below this, there are two input fields: 'Email address' with the value 'testchar1@charitablegiving.co.uk' and 'Password' with a masked password '••••••'. To the right of the password field is a 'Login' button. Below the password field is a link for 'Forgotten password?'. At the bottom left, there is a section for 'Not registered to use our on-line services?' with a button for 'On-Line User Registration'. At the bottom of the page, there is a footer with links: 'Home | About us | News | Charities | Employers | Employees | 'Every Penny Helps' | Registered User Login | Contact Us | Links'.

3. After your Email Address and Password have been validated:

The screenshot shows the Charitable Giving website interface. At the top left is the logo "Charitable Giving we make giving easy". To the right are links for "Contact us" and "User Login". A blue navigation bar contains links: "About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links |". The main heading is "Charity Reporting". Below it, it says "Welcome, Test Charity 1" with a "Logout" link. A message reads: "For additional security, please enter your Charity Reference below and press [Submit:]". There is a text input field containing "9991" and a "Submit" button. A blue callout bubble points to the "Submit" button with the text: "Enter your Charity Reference and then press [Submit]". At the bottom, a footer contains: "Home | About us | News | Charities | Employers | E".

You will have received your Charity Reference(s) in the email confirming your registration and account activation

4. The **Current Reports** available for your charity will then be listed, the most recent first according to the format, YEAR_MONTH_CHARITY REFERENCE_CHARITY NAME, as shown below:

The screenshot shows the Charitable Giving website interface. At the top left is the logo "Charitable Giving we make giving easy". To the right are links for "Contact us" and "User Login". A blue navigation bar contains links: "About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links |". The main heading is "Charity Reporting". Below it, it says "Welcome, Test Charity 1" with a "Logout" link. A message reads: "The following reports are available for download, archiving and deletion. Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below." Below this is a section titled "Current Reports" containing a table:

<input type="checkbox"/>	Filename	
<input type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Below the table is an "Action" field with a dropdown menu set to "Archive" and a "GO" button. Below this is a section titled "Archived Reports" which is currently empty. At the bottom, a footer contains: "Home | About us | News | Charities | Employers | Employees | 'Every Penny Helps' | Registered User Login | Contact Us | Links".

5. Files can be downloaded one at a time. To **Download** a file:

Charitable Giving
we make giving easy

Contact us
User Login

About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links

Charity Reporting

Welcome, Test Charity 1 [Logout](#)

The following reports are available for **download, archiving and deletion**.

Click the Download link against a report to save the file. You can also check the relevant box/es and use the drop down menu to archive or delete reports.

Current Reports

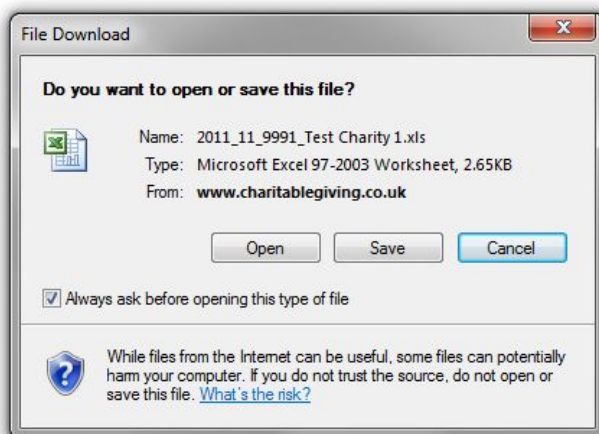
<input type="checkbox"/>	Filename	
<input checked="" type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Action: Archive

Archived Reports

Home | About us | News | Charities | Employers | Employees | 'Every Penny Helps' | Registered User Login | Contact Us | Links

6. The **File Download** dialog will then be displayed, as shown below, and you can **Open** or **Save** the file as required



Other files can then be downloaded in the same way and downloaded files remain in the list of files under **Current Reports** until moved to **Archived Reports** or **Deleted**.

Please note, however, that to conserve space files older than 180 days will be deleted automatically; if you require a report that has been removed, please contact Charitable Giving and there may be an additional charge for this service.

7. To view any **Archived Reports**:

Current Reports

Filename	Download
<input checked="" type="checkbox"/> 2011_11_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_10_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_09_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_08_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_07_9991_Test Charity 1.xls	
<input type="checkbox"/> 2011_06_9991_Test Charity 1.xls	

Action: Archive [GO]

Archived Reports

Filename	Download
<input type="checkbox"/> 2011_05_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_04_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_03_9991_Test Charity 1.xls	Download

Action: Unarchive [GO]

Open the list by clicking on the **Archived Reports** link

8. Any number of **Current Reports** can be archived as a batch by:

Current Reports

Filename	Download
<input type="checkbox"/> 2011_11_9991_Test Charity 1.xls	
<input type="checkbox"/> 2011_10_9991_Test Charity 1.xls	
<input type="checkbox"/> 2011_09_9991_Test Charity 1.xls	
<input checked="" type="checkbox"/> 2011_08_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/> 2011_07_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/> 2011_06_9991_Test Charity 1.xls	Download

Action: Archive [GO]

Archived Reports

Filename	Download
<input type="checkbox"/> 2011_05_9991_Test Charity 1.xls	
<input type="checkbox"/> 2011_04_9991_Test Charity 1.xls	Download
<input type="checkbox"/> 2011_03_9991_Test Charity 1.xls	Download

Action: Unarchive [GO]

1. Selecting the file(s) by clicking the box to the left of the name(s)

2. Selecting **Archive** from the dropdown in the Action options window and then pressing [GO] button

Alternatively, files can be similarly deleted from the **Current Reports** list by selecting the **Delete** option instead.

9. In a similar manner, files can be moved from **Archived Reports** to **Current Reports** using the **Unarchive** option followed by [GO] having selected the required files as before:

Archived Reports

Filename	Download
<input type="checkbox"/> 2011_05_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/> 2011_04_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/> 2011_03_9991_Test Charity 1.xls	Download

Action: Unarchive [GO]

Unarchive

Delete

10. It is worth noting that when using the **Archive**, **Delete**, and **Unarchive** functions, all files can be selected by:

Charitable Giving
we make giving easy

Contact us
User Login

About us | News | Payroll Giving | Options Accounts | 'Every Penny Helps' | Corporate Services | Downloads | Links |

Charity Reporting

Welcome, Test Charity 1

The following reports are available for

Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below.

Current Reports

<input checked="" type="checkbox"/>	filename	
<input checked="" type="checkbox"/>	2011_11_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_10_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_09_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_08_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_07_9991_Test Charity 1.xls	Download
<input checked="" type="checkbox"/>	2011_06_9991_Test Charity 1.xls	Download

Action: Archive ▾

Archived Reports

Home | About us | News | Charities | Employers | Employees | 'Every Penny Helps' | Registered User Login | Contact Us | Links

11. When you have finished your session, you can logout by:

Charity Reporting

Welcome, Test Charity 1

The following reports are available for **download, archiving** and **deletion**.

Click the Download link against a report to save it to your own system. To archive or delete report/s check the relevant box/es and use the drop down facility below.

[Logout](#)

Clicking on the [Logout](#) link

Additional copies of this User Guide can be obtained from:
www.charitablegiving.co.uk > Downloads > Literature