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TO: **Donor Choice Reports Staff**
FROM: **Michelle Sauls, Manager, Operations**
SUBJECT: **Accessing United Way of Greater Knoxville's† (UWGK) Donor Choice Reporting System**

Thank you for participating in the United Way of Greater Knoxville† (UWGK) online agency reporting system! Below you will find valuable information regarding this system. Please refer to the information provided below before accessing the website.

If you are not currently enrolled in the new online reporting system please fill out the enrollment form. If you have any questions, please contact Michelle Sauls; contact information is located at the end of the instructions.

Entering the Donor Choice Reporting System

Step 1: Go to UWGK Internet site at http://unitedwayknox.org/ , click on [Partner Tools] located on the top tool bar, and select [Donor Choice Reporting System].
OR
You should have been sent a link that will take you straight to your organizations information within the reporting system. Please contact Michelle Sauls at saulsm@unitedwayknox.org if you need a link.
OR
Go directly to the Donor Choice Reporting website at http://www.unitedwayknox.org/ecommunity/Begin.jsp to access Donor Choice Reporting options for your agency or United Way.

Step 2: Log in using your User ID and password*.
OR
Use the link provided. (See Above)
*If UWGK has an electronic funds transfer contact for your organization, an email containing their user name and password has or will be sent to that contact. If you don't know your user ID and password or to add an additional contact please email me at saulsm@unitedwayknox.org.
Once you have logged in, you will be on the main menu page.

Step 3: Along the left hand side are the menu options you may have available depending on your Agency or United Way status:
o **Home** –you are on UWGK's home page Donor Choice Reporting System HomePage.
o **Contacts** – this option is to look at the contacts associated with your organization as either the Donor Choice Report Staff or CEO.
o **Instructions** – this will lead you to a copy of these instructions on what each report is for and how to run them.
o **Designation Notifications** – allows you to either run the report for **Agencies** or **United Ways** to find out how much in designations were pledge to your organization through UWGK for different campaign years.
o **Payment Reports** – this option includes the **Remittance Report**, simply explaining a payment amount sent to your organization, and the **Payee By Company Report**, listing the companies and individuals' that make up the payment to your organization.
o **United Way Website** – takes you to UWGK's Main Website
o **My Outputs** – list of all reports you have run.
o **My Account** – lists your individual user information and allows you to change your password.
o **Signoff** – Sign off the website.
         Select an option from the main menu.

Step 4: Make the necessary selections for your desired report.

Acknowledgements to Agencies Report

_ **Report at Acknowledge Account:** Report for United Ways to get comprehensive reports based on funds raised in your area and designations from donors.

_ **Report at Agency Level:** Report just for your agency.

_ **Campaign Year:** Enter campaign year. (Current or just ended Campaign Year entered as the default year.

_ **Campaign Account:** Select the specific campaign. (United Way Local Campaign is the UWGK Campaign.)

_ **Include donors previously sent to agencies:** Check if you want the report to include all donors. Don't check if you only want donors added since last report.

_ **Include Undesignated on report:** Check if you want to include the undesignated portion of pledges due to your United Way. (Only applies if you are a United Way.)

_ **Print Employer Name on report:** Check to include the names of the Employers where your donors are employed.

_ **Print Transaction Type (Payment Method) on report:** Check to show the donors' method of payment to UWGK.

_ **Print Checkoff Master account name on report:** Check if you want the report to reflect the name of the United Way in the donors' service area.

_ **Include Pay Direct Designations on report:** Check if you would like to see the amount paid to your agency through direct payments from the donor.

Step 5: Press the 'submit' button once you have made your selections.

Donor Choice Standard-M Agency Projection Report

*Report shows projections of payments to your organization.

_ **Select one of these saved data from previous runs:** Select a report based on **Year**, **Campaign** and **Cutoff Date**.

_ **Report Type:** Select the specific report type. The reports can be produced in the following types of output: PDF (Adobe), Spreadsheet CSV or the report can be produced in both PDF and Spreadsheet.

Step 5: Press the 'submit' button once you have made your selections.

Payee Remittance Report

_ **Select one of these payout definitions to print report:** Select a payout definition based on the definition's **Description**.

_ **Report Type:** Select the specific report type. The reports can be produced in the following types of output: PDF (Adobe), Spreadsheet CSV or the report can be produced in both PDF and Spreadsheet.

Step 5: Press the 'submit' button once you have made your selections.

Payee by Organization Report

_ **Select:** Select the payment description listed.

_ **Roll-Up:** Leave un-checked.

_ **Exclude all records with zero dollars:** Make sure it is checked.

_ **Report Type:** Select the specific report type. The reports can be produced in the following types of output: PDF (Adobe), Spreadsheet CSV or the report can be produced in both PDF and Spreadsheet.

Step 5: Press the 'submit' button once you have made your selections.

Passthru Designation Summary Report

*Report for Master United Ways only.

_ **Select one of these saved data from previous runs:** Select a report based on **Year**, **Campaign** and **Cutoff Date**.

_ **Report Type:** Select the specific report type. The reports can be produced in the following types of output: PDF (Adobe), Spreadsheet CSV or the report can be produced in both PDF and Spreadsheet.

Step 5: Press the 'submit' button once you have made your selections.

Donor Choice Standard-M Passthru Projection Report

*Report shows projections of passthru payments to your United Way. Report for Master United Ways only.

_ **Select one of these saved data from previous runs:** Select a report based on **Year**, **Campaign** and **Cutoff Date**.

_ **Report Type:** Select the specific report type. The reports can be produced in the following types of output: PDF (Adobe), Spreadsheet CSV or the report can be produced in both PDF and Spreadsheet.

Step 5: Press the 'submit' button once you have made your selections.

My Outputs

_ **Access Report:** Click on the name of the report to get the output generated.

_ Click the 'Red X' to delete any report.

_ **Cancel:** Returns you to the homepage.

Reports will remain in 'My Output' for 7 days. We recommend saving all of your reports to your local computer.

If you are responsible for more than one agency you can change which agency you are viewing by clicking on the Organizations link below the main menu. Also listed there are other roles you may have with UWGK.

†United Way of Greater Knoxville serves Grainger, Knox, Jefferson, Loudon and Union counties.