Technology Manual
Mini Workshop

Fiscal Year 2017-2018

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The Pap Corps®

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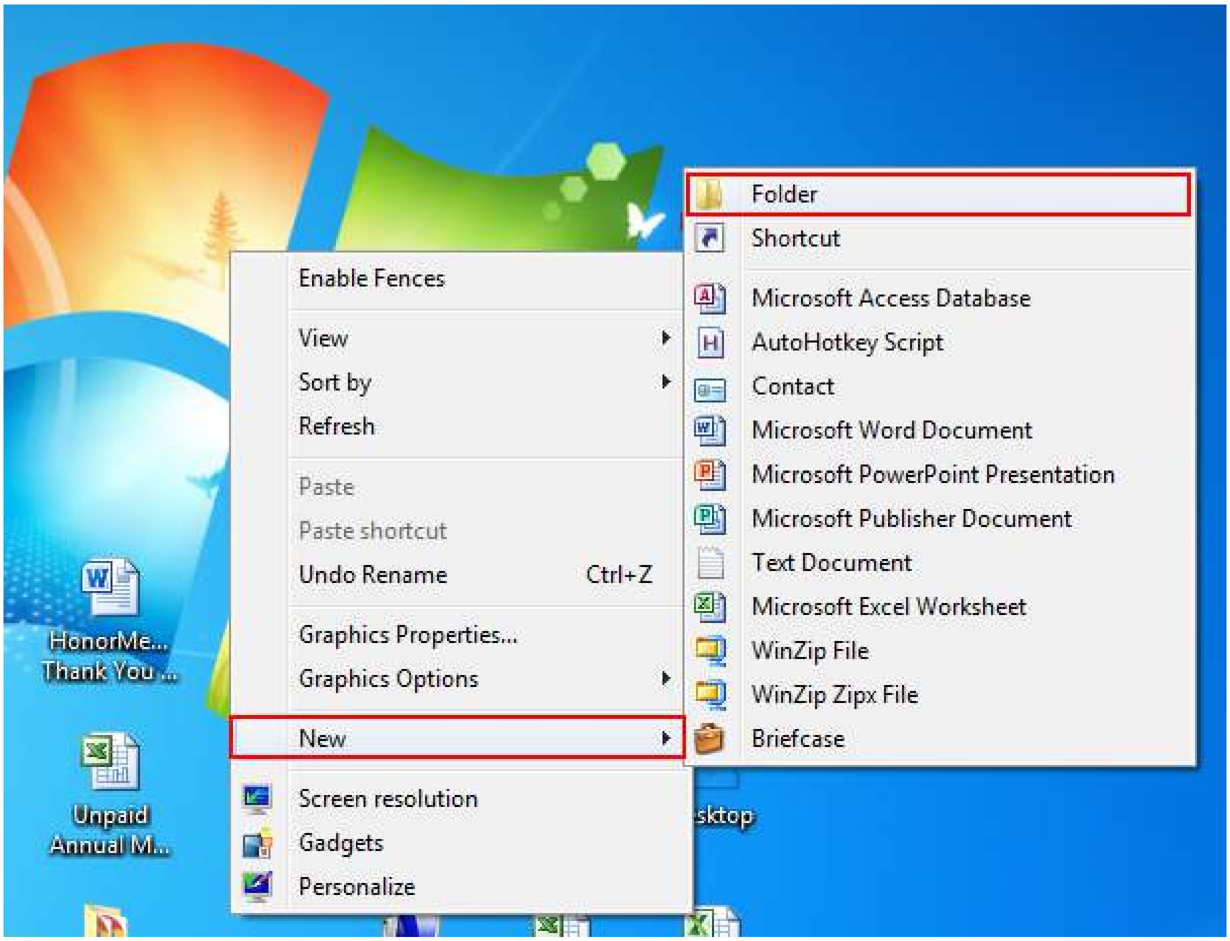
Table of Contents

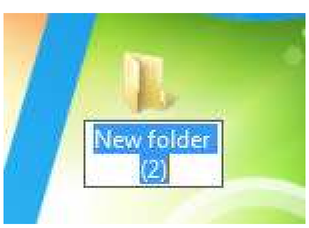
Computer Basics

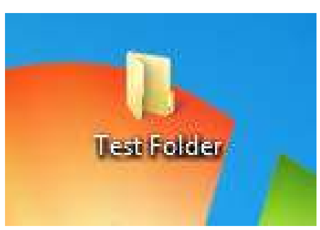
Creating a New Folder on Your Desktop

1. Right-click on your desktop and move your mouse over "New"



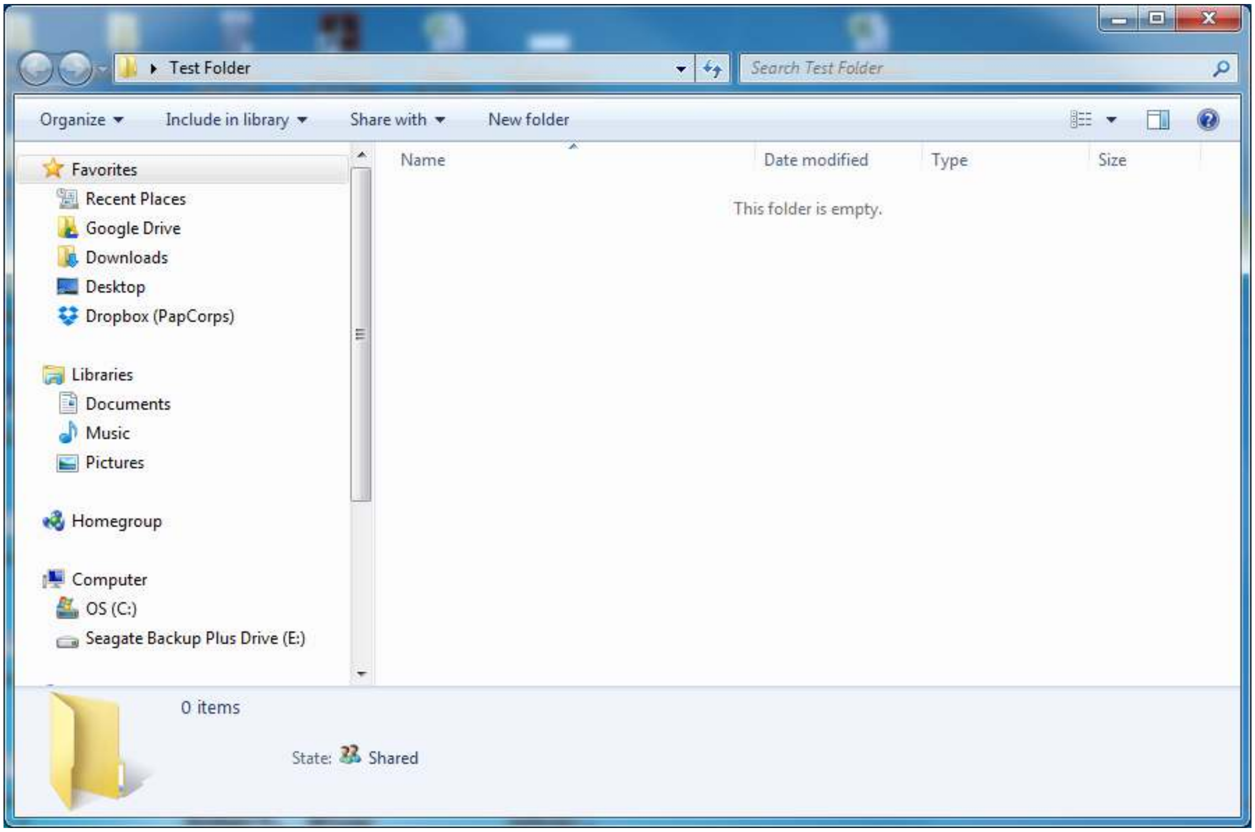
2. When the submenu pops up, click "Folder". A new folder will appear, named "New folder"





3. Type whatever name you'd like to give the folder – it will overwrite "New Folder" as the name

4. You can now double click to open that folder and use it to store files.



Moving a File to Your Folder

- To move a file to your folder, left click the file, hold, and drag it to the folder. (This can be done with the folder open, or closed)

Downloading a File to Your Computer

For this example, we will be downloading a file from the 'Officers Only' section of The Pap Corps website, but it can be applied to any other file online.

(Do not download files from websites you do not trust.)

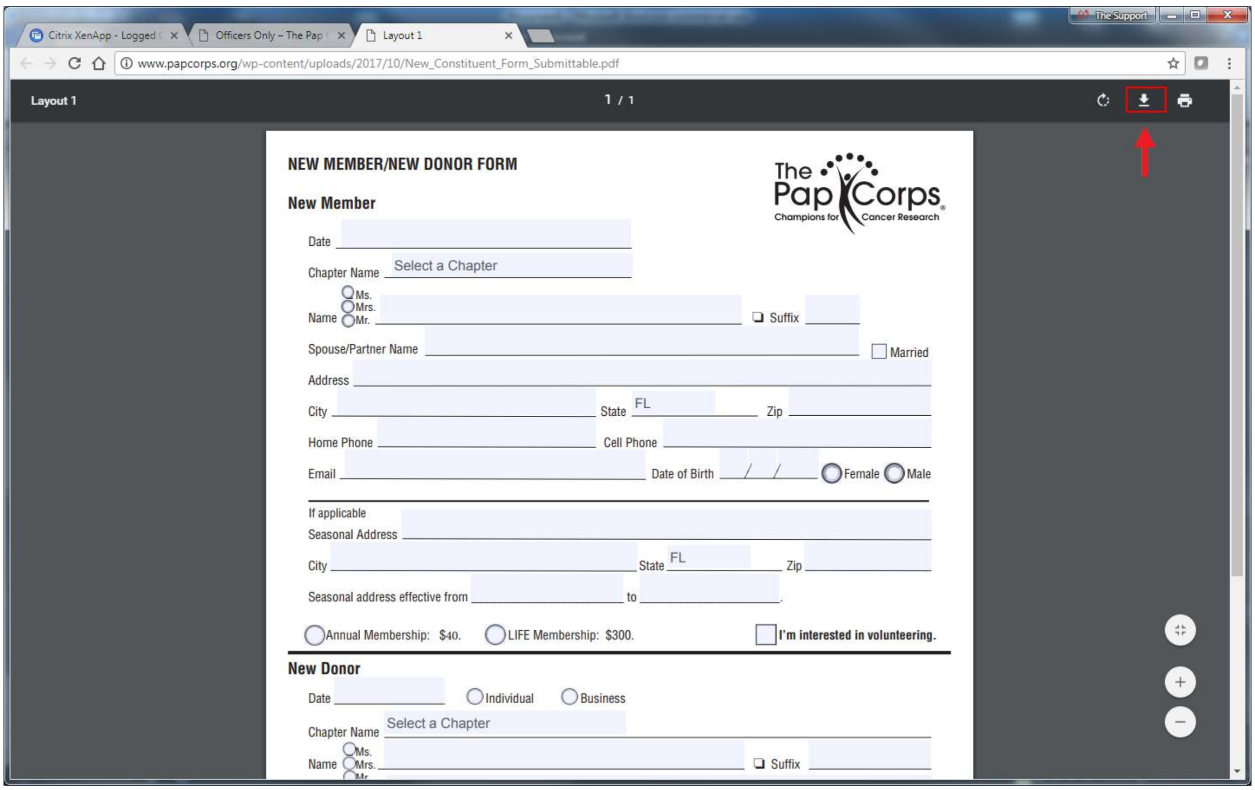
The 'Officers Only' section offers forms in three different formats: Excel, PDF, and Fillable PDF.

Most files, like Excel, will download as soon as you click on the file link. Generally, these end up in your Download folder on your computer. We will show you how to find them.

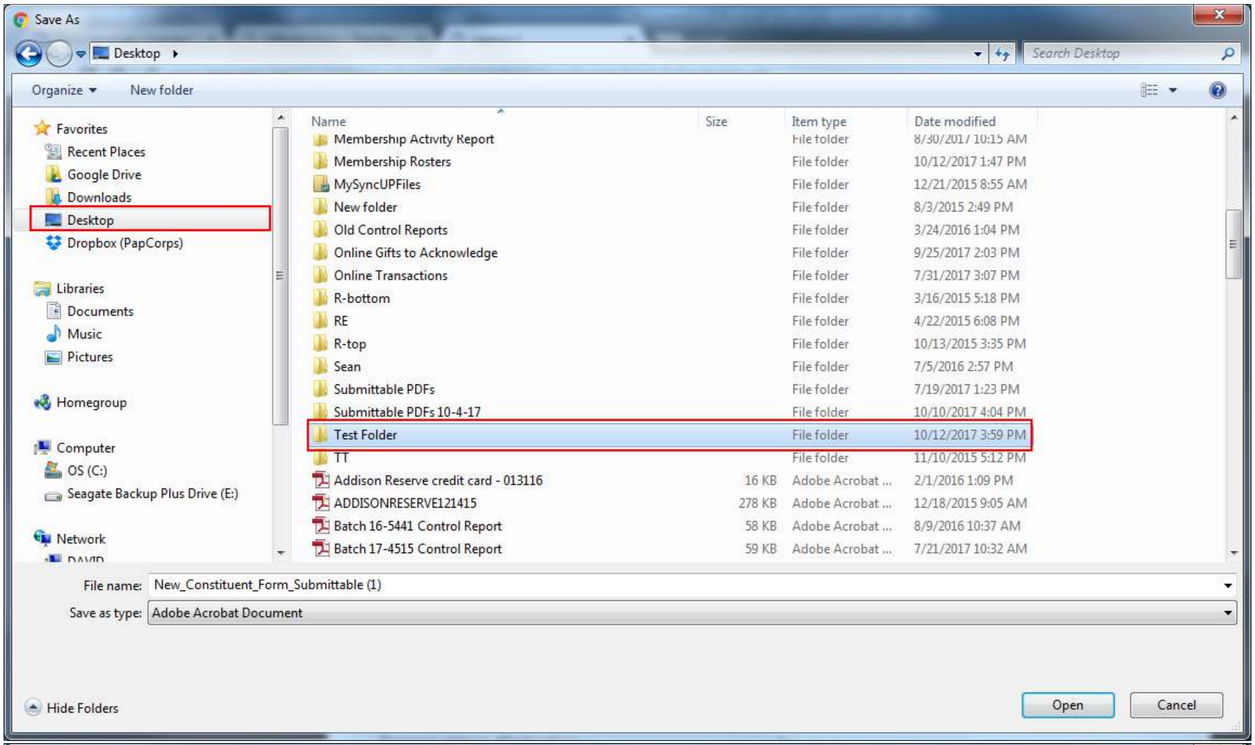
Other files, like PDFs, will open directly in your browser. We will show you how to download and save these to your computer so you can use them.

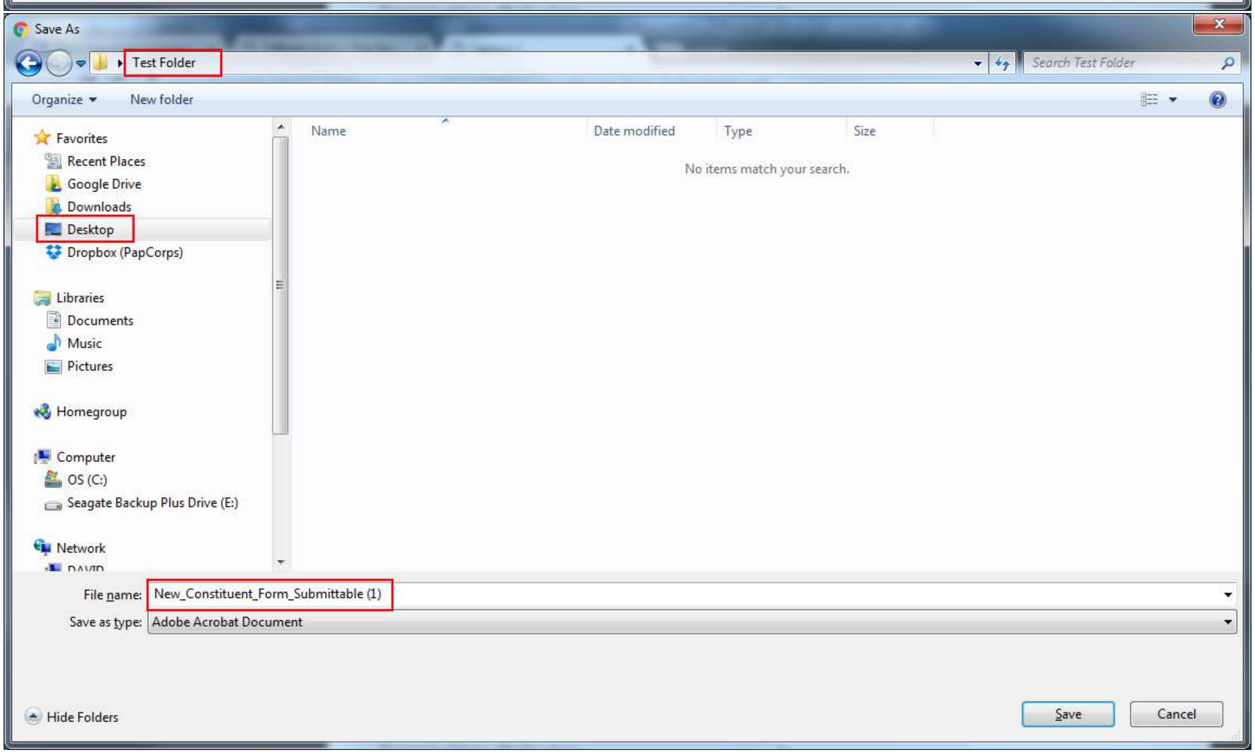
Download and Save a PDF File to Your Computer

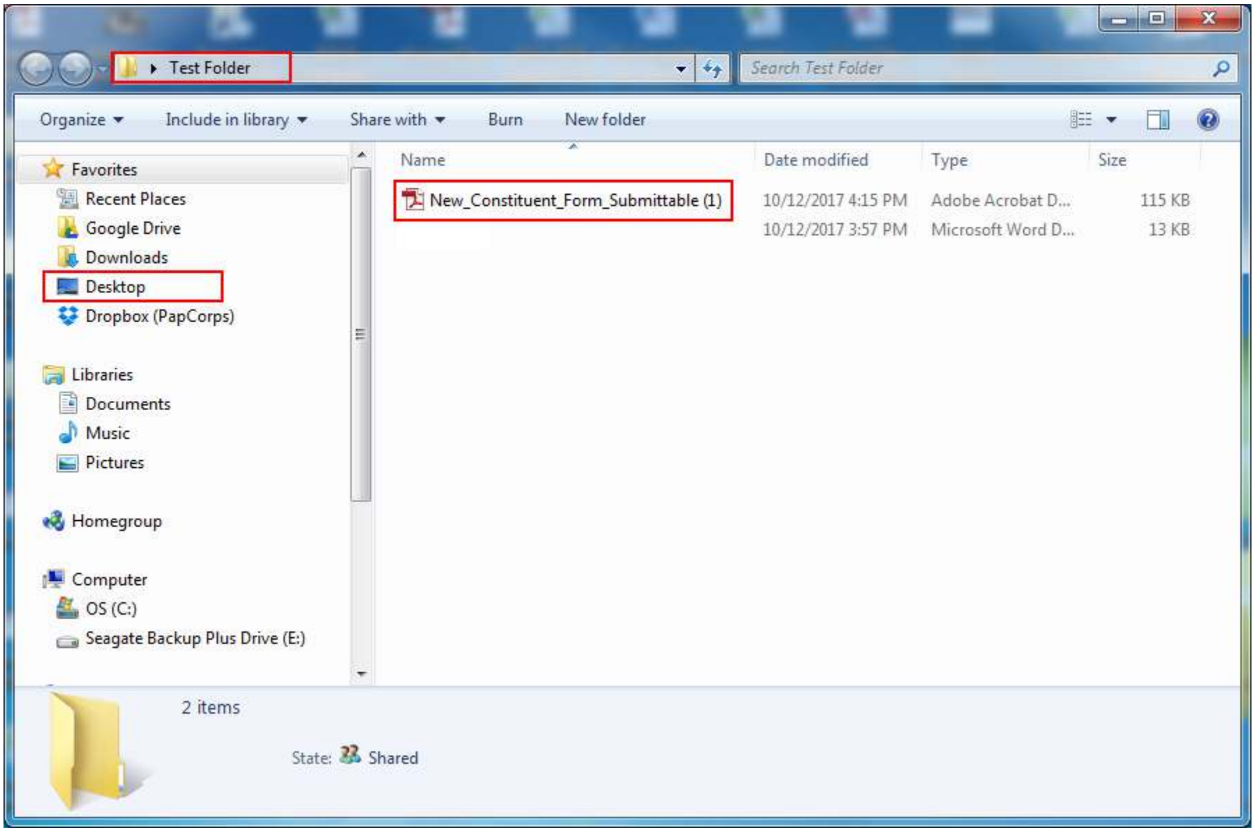
1. Go to: http://www.papcorps.org/officers-only/
2. Login, or if you are already logged in, click on the 'Officers Only' tab on the main menu
3. Click on the file you want to download (in this case it will be a PDF file, Plain or Fillable)
   - You can click on the 'Download' arrow in the upper right corner; or
   - you can right-click on the file and select "Save link as…"
     Either way will allow you to choose where you want the file to download to and will let you rename the file. Both methods require the same steps.



4. To save the file to your newly-created folder on the Desktop, click on Desktop on the left
5. Select your folder.
6. Either double click on the folder or click Open
7. Click Save.
8. Open your new folder from the desktop and your file is there.

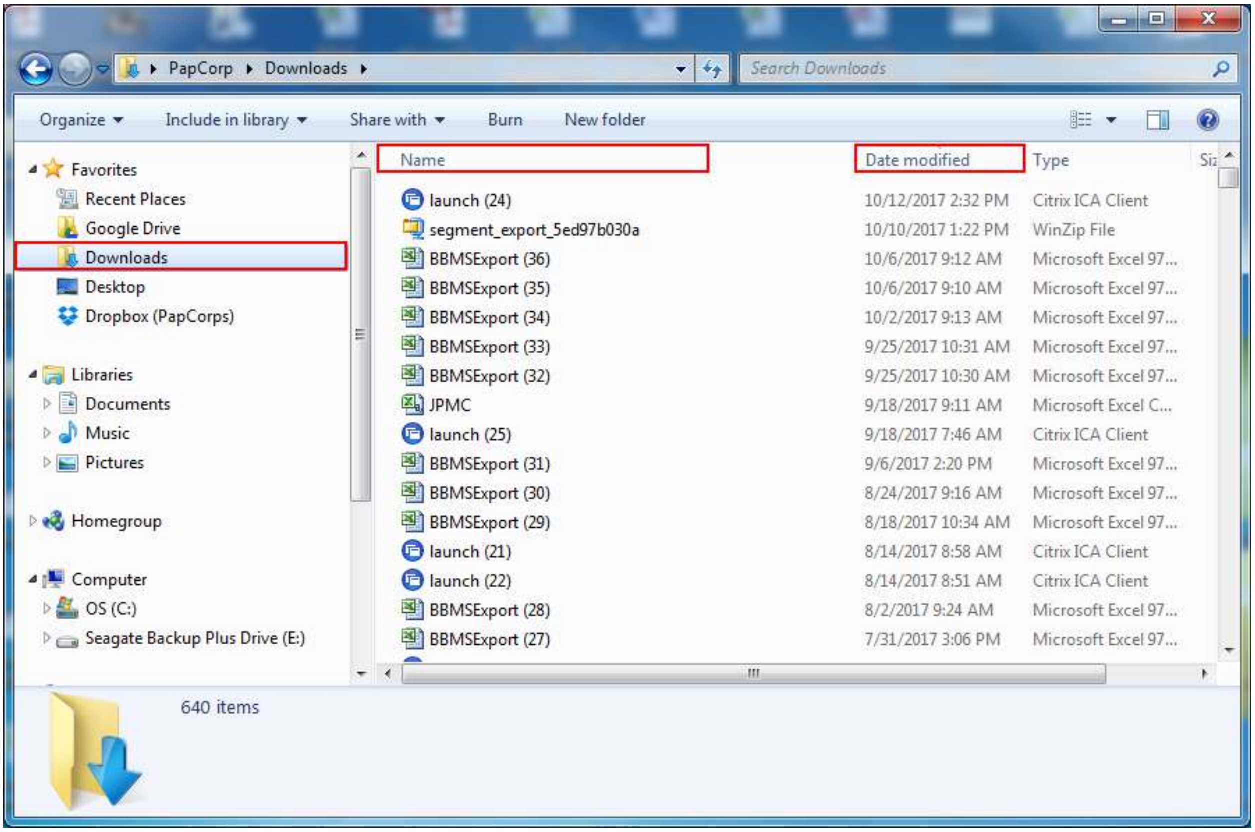

Save As
Desktop
Search Desktop
Organize
New folder
Favorites
Recent Places
Google Drive
Downloads
Desktop
Dropbox (PapCorps)
Libraries
Documents
Music
Pictures
Homegroup
Computer
OS (C:)
Seagate Backup Plus Drive (E:)
Network
Name
Size
Item type
Date modified
Membership Activity Report
Membership Rosters
MySyncUPFiles
New folder
Old Control Reports
Online Gifts to Acknowledge
Online Transactions
R-bottom
RE
R-top
Sean
Submittable PDFs
Submittable PDFs 10-4-17
Test Folder
TT
Addison Reserve credit card - 013116
ADDISONRESERVE121415
Batch 16-5441 Control Report
Batch 17-4515 Control Report
File name:
New_Constituent_Form_Submittable (1)
Save as type:
Adobe Acrobat Document
Hide Folders
Open
Cancel


Save As
Test Folder
Search Test Folder
Organize
New folder
Favorites
Recent Places
Google Drive
Downloads
Desktop
Dropbox (PapCorps)
Libraries
Documents
Music
Pictures
Homegroup
Computer
OS (C:)
Seagate Backup Plus Drive (E:)
Network
Name
Date modified
Type
Size
No items match your search.
File name:
New_Constituent_Form_Submittable (1)
Save as type:
Adobe Acrobat Document
Hide Folders
Save
Cancel



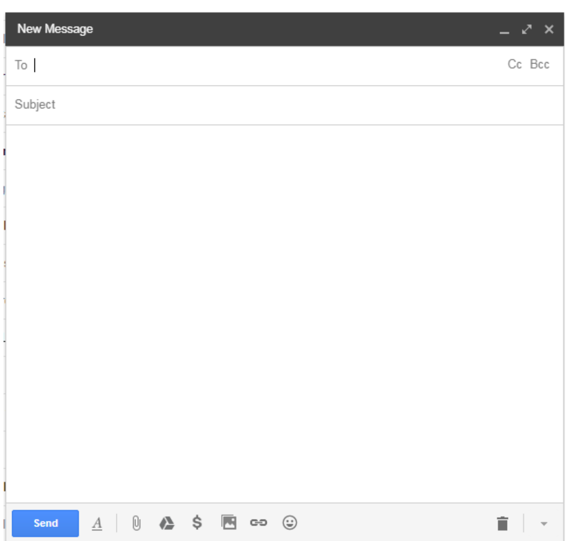
Download, Find and Save an Excel File to Your Computer

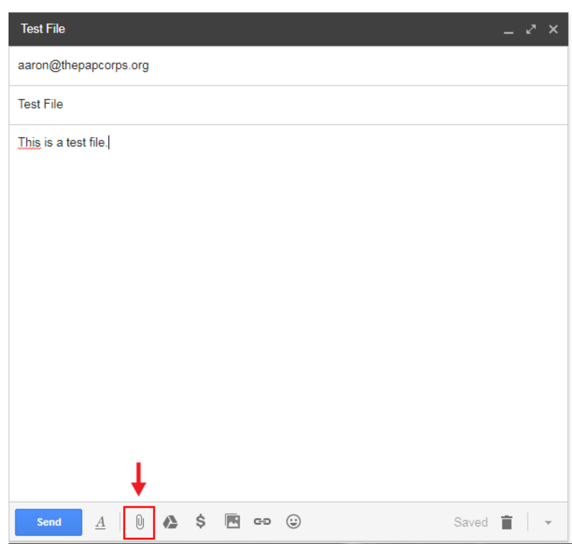
1. In the 'Officers Only' part of the website, click on an Excel file. The file will download automatically.
2. To find it, open up any folder.
    - You can double click on any folder on your Desktop
3. Click "Downloads" on the left panel
4. Find the file on the list
    - By clicking on the column header, you can sort files in alphabetical order by Name, or in chronological order by Date Modified
5. Double click on the file to open it



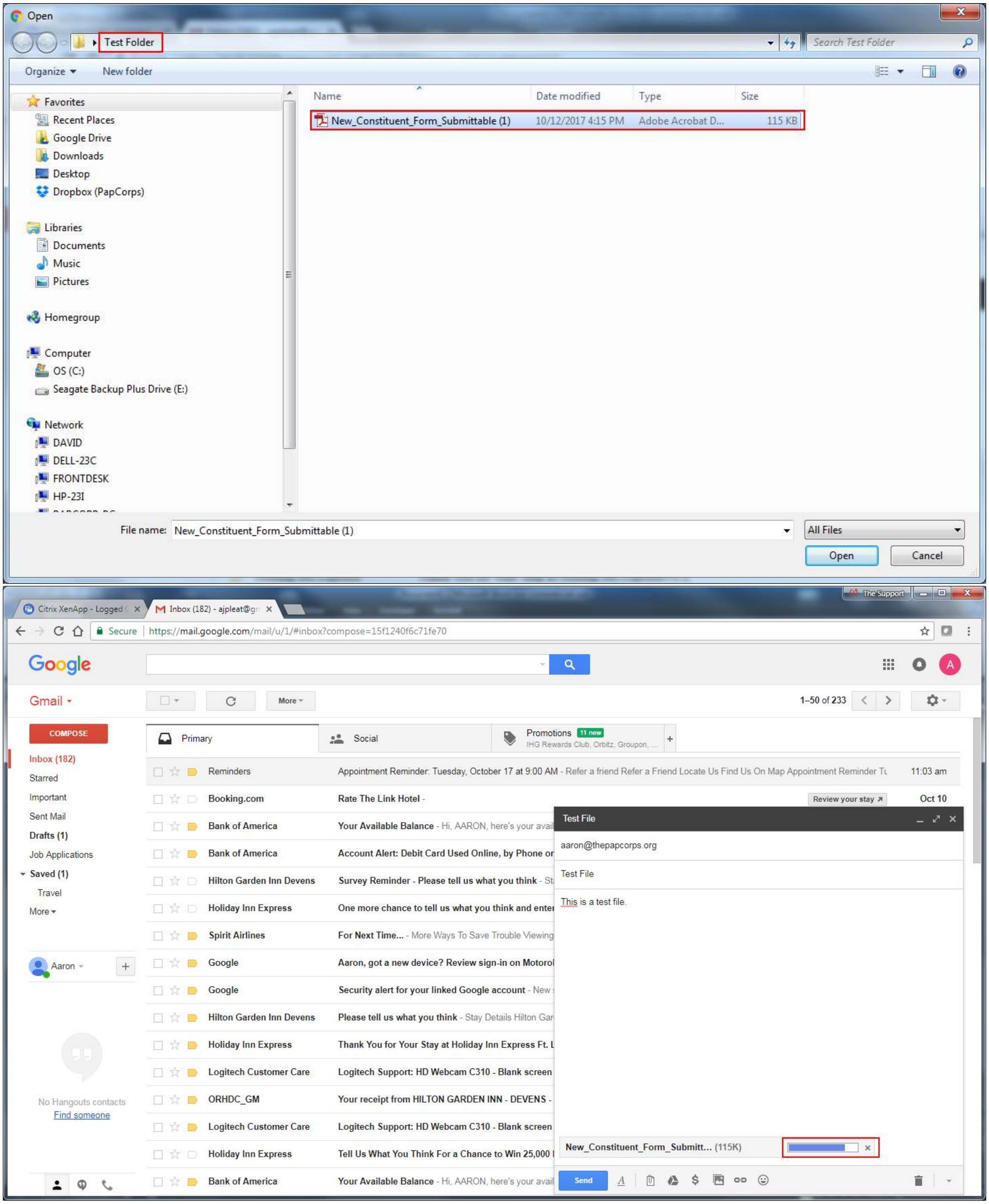
Attaching a File to an E-mail

1. Create a new e-mail using your e-mail client. On Gmail you do this by clicking on “Compose.”
2. Add the “To” and any CC/BCC addresses, the subject and any text for the body of the e-mail.





3. Click on the paper clip button near the bottom – this is the “Attach a file” button.
4. Navigate to the folder your file is located in, select it and click Open
   Your file may take some time to attach depending on how large it is. Once it is finished (there is no more progress bar), send your email



How to Use Submittable PDF Forms

Requirements

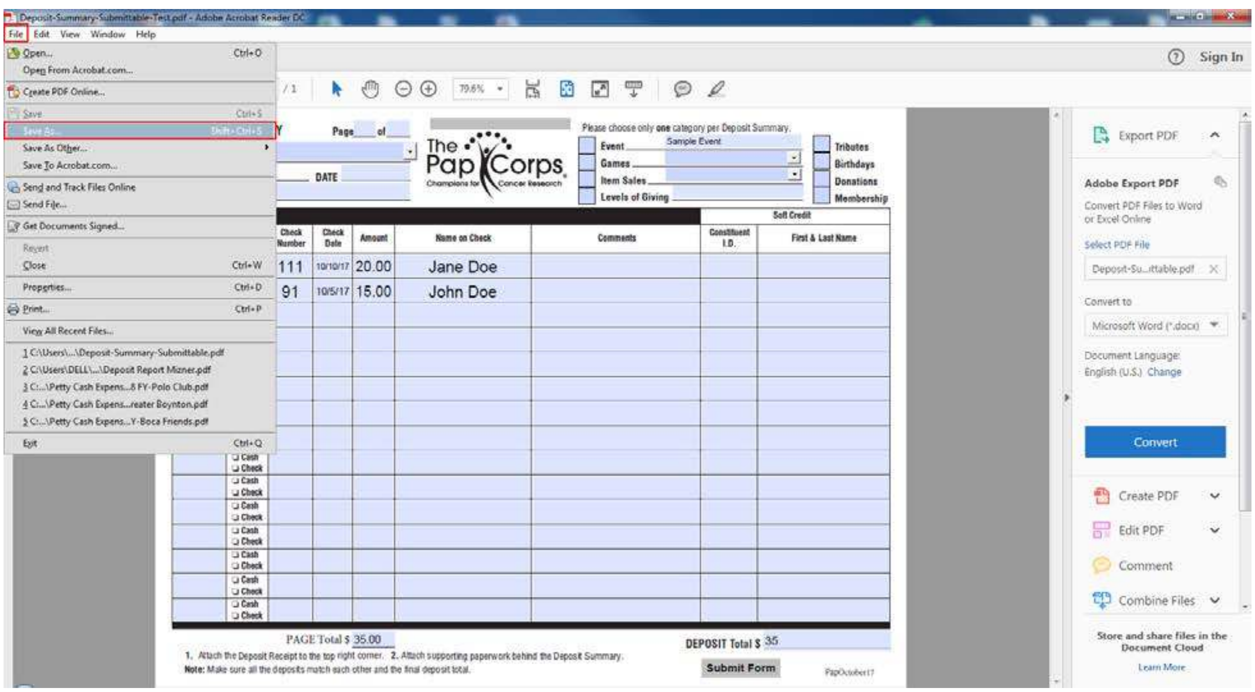
- Make sure you have Adobe Reader DC installed. You can get this at https://get.adobe.com/reader/

Downloading and Saving the Fillable PDF Form

1. From the 'Officers Only' section, download and save the Fillable PDF to your computer
    - Refer to the section on Downloading a File to Your Computer on Page 5
2. Then open it from there
    - Filling it out from your browser after just clicking on the PDF link will not work

Using and Saving the Fillable PDF Form

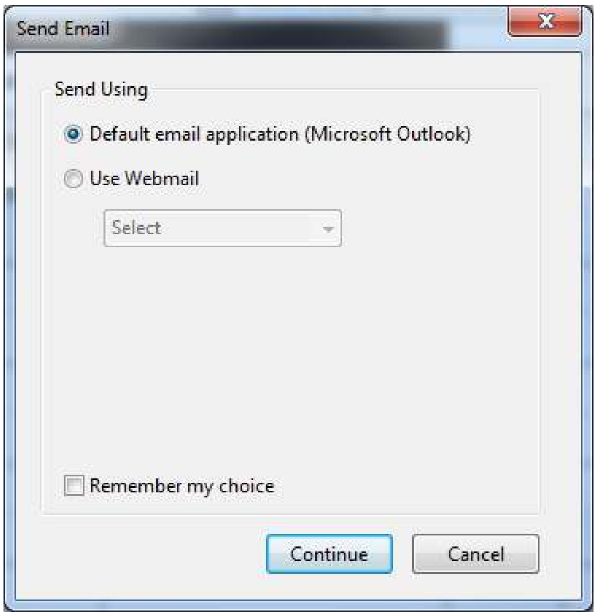
1. Fill in the form with all the necessary information
2. Save it with a unique name using "Save As" under File
    - Saving it using a unique name will prevent you from overriding the blank form
    - It will also serve as the copy you need to keep for your records

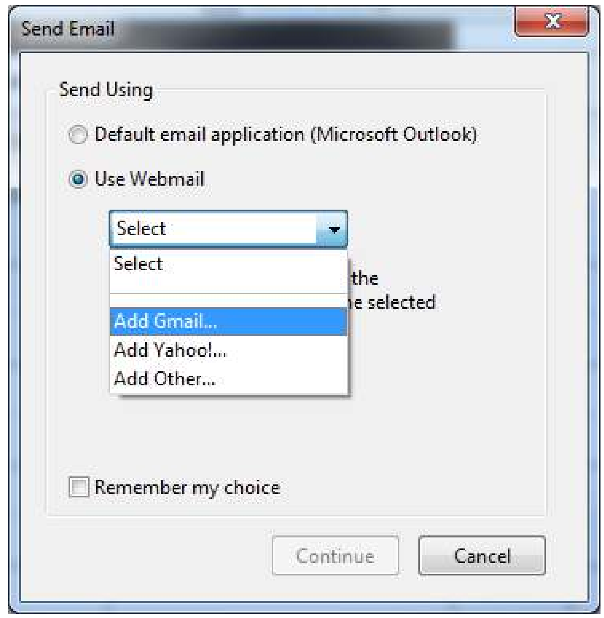


Submitting the Fillable PDF Form

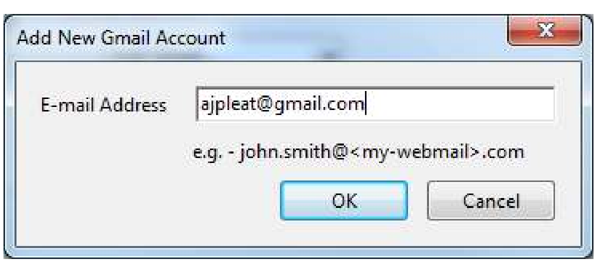
1. Once the form has been completely filled out and saved, Click on the "Submit Form" button at the bottom of the form.

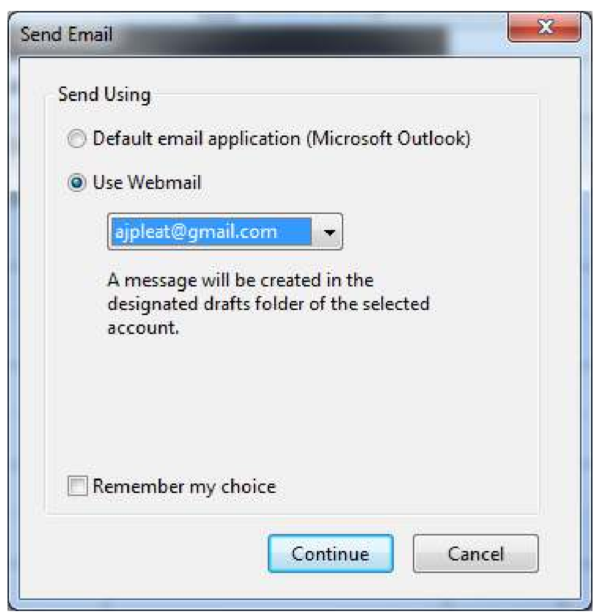
2. The pop-up window will ask what email client you want to use to send the form
    - If you have a default client like Outlook already setup on your computer, keep the default selection and click ‘Continue’
3. If you don’t have an email program setup, then select “Use Webmail”
4. Click on the Select dropdown menu.
5. Select from the email services on the list. In this case we will “Add Gmail…”
6. Check the “Remmeber my choice” option and click Conitnue



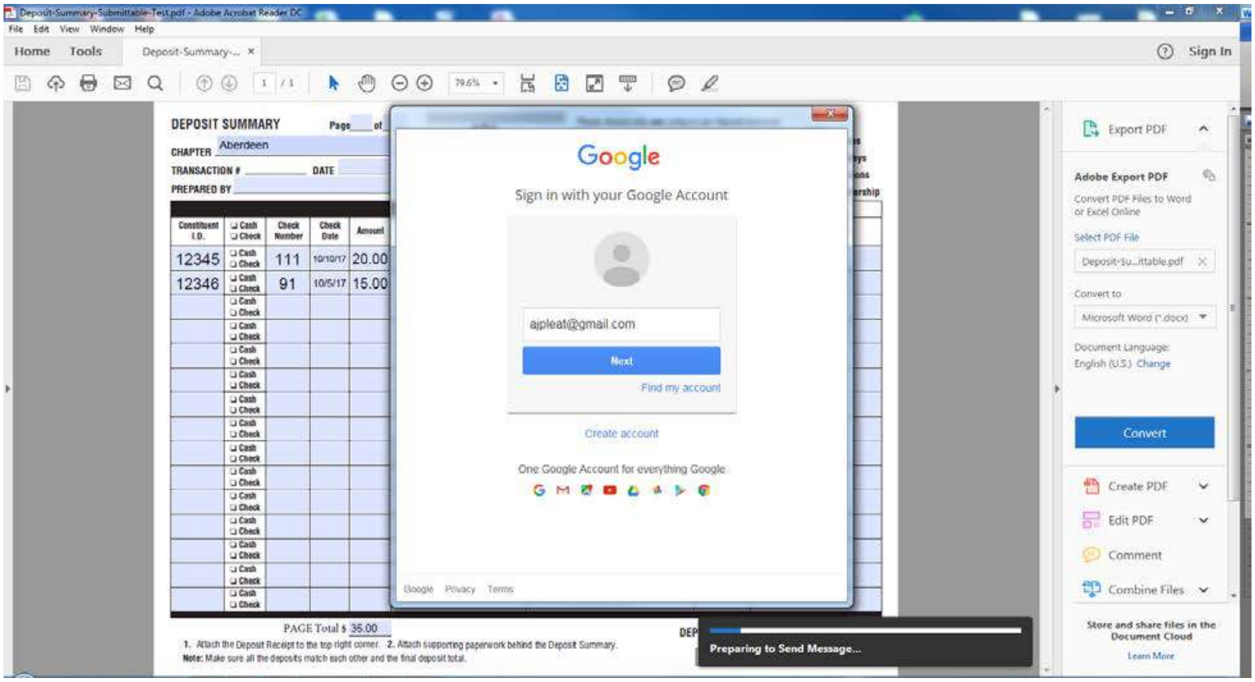


7. Type in your e-mail address and click OK
8. Check the “Remember my choice” box and click Continue

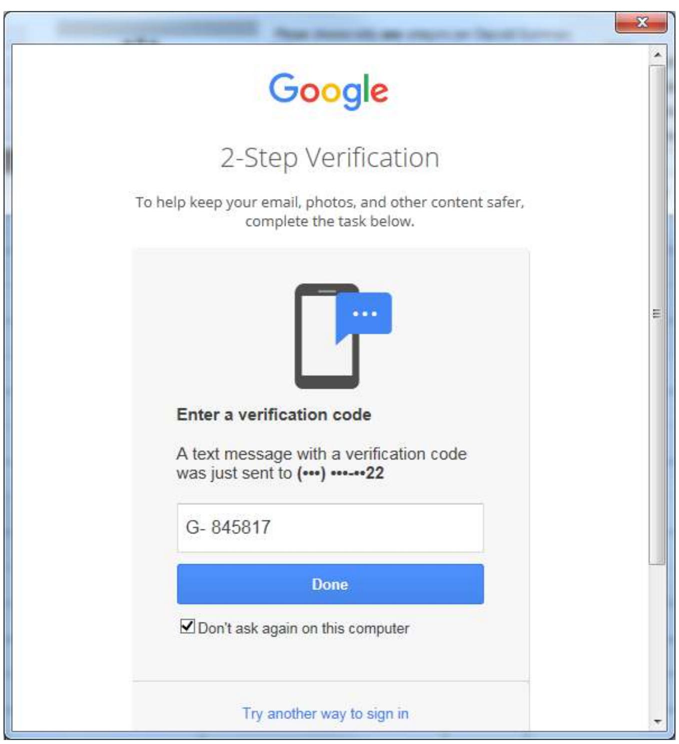




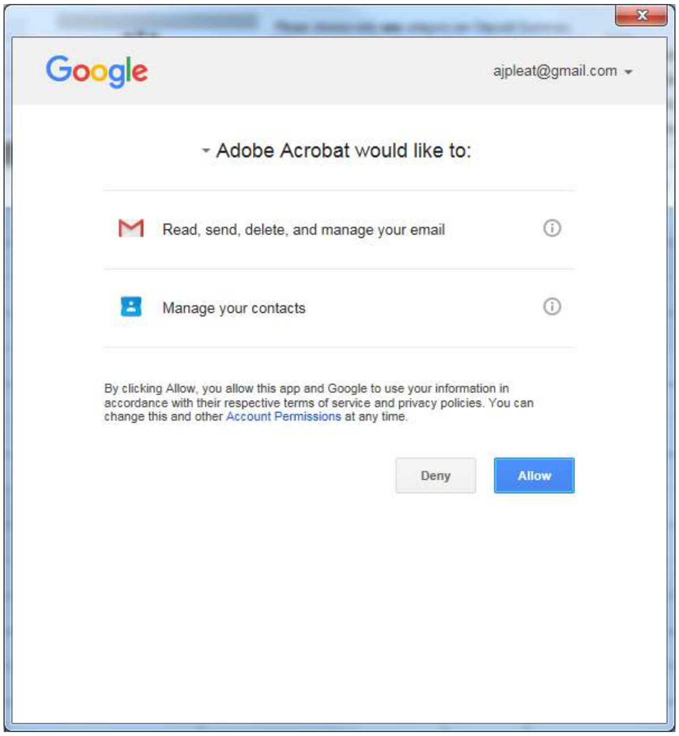
9. You will be asked to sign in with your e-mail account – click Next and enter your password if it asks for it.



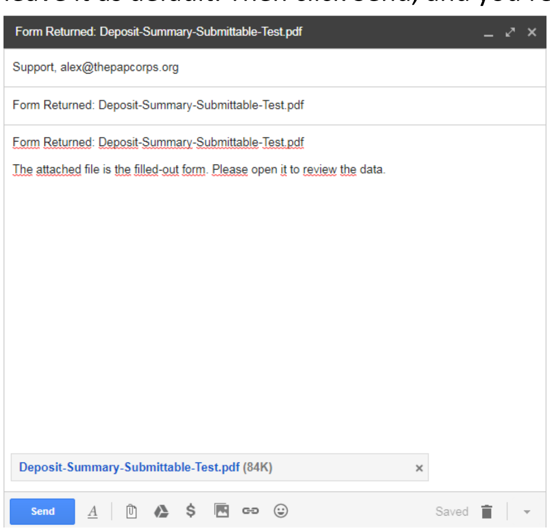
10. Gmail and some other e-mail clients may ask you for a verification code – typically this will be texted to your cell phone, or e-mailed to your backup e-mail if you have one. Enter it and click Done.



11. Adobe Acrobat will ask for permission to “Read, send, delete, and manage your email”, and “Manage your contacts”. All this will do is allow Acrobat to create the e-mail, fill in the people it’s supposed to be sent to, and attach the file. Click Allow.



12. After the progress bar at the bottom finishes (this may take some time the first time), a new draft will appear in your e-mail waiting to be sent.
13. Each of the submittable PDFs will have specific addresses they go to – for example, this Deposit Summary goes to alex@thepapcorps.org
14. Attach any extra files that are needed (for example, a scan of your Deposit Receipt for a Deposit Summary), and change the e-mail name and body to whatever you want if you don’t want to leave it as default. Then click Send, and you’re done.

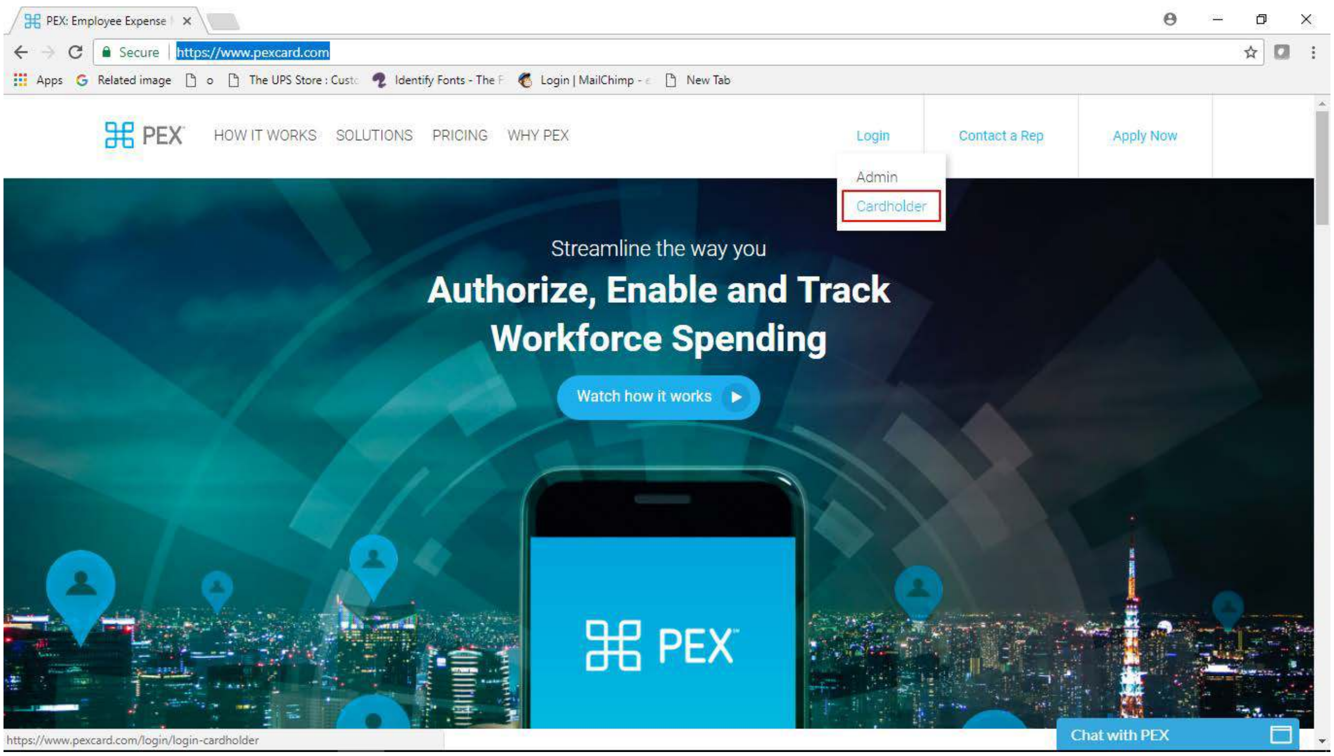


How to Prepare the Pex Card Report Online

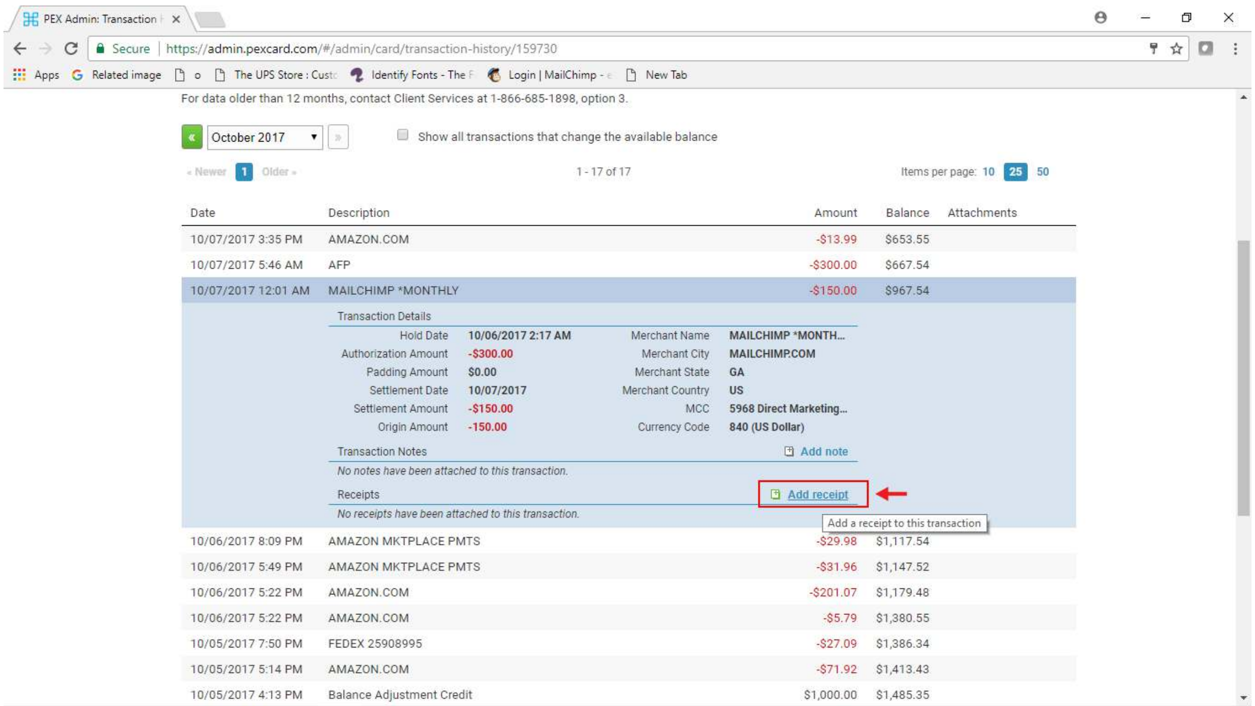
Prepare Pex Card Report on the Website (Desktop Computer or Laptop)

Attach Receipts and Add Comments to Pex Card transactions

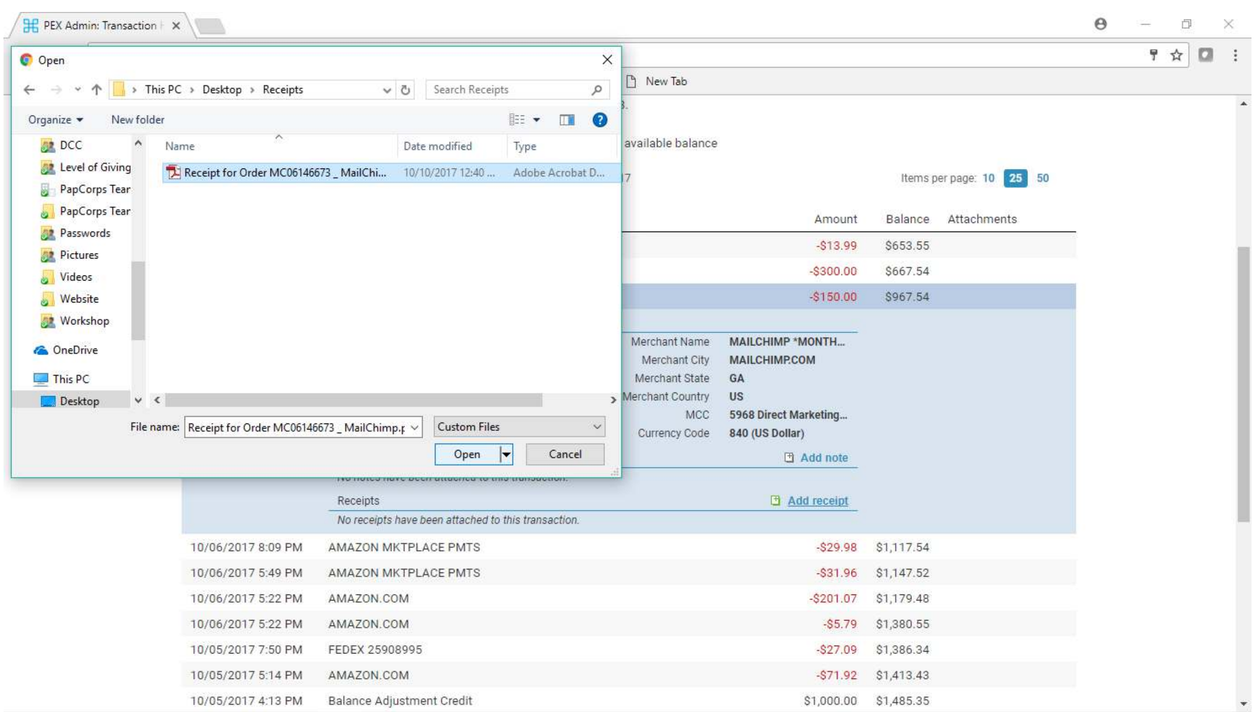
1. Go to https://www.pexcard.com/
2. Hover your mouse over the 'Login' tab
3. Click on the 'Cardholder' option



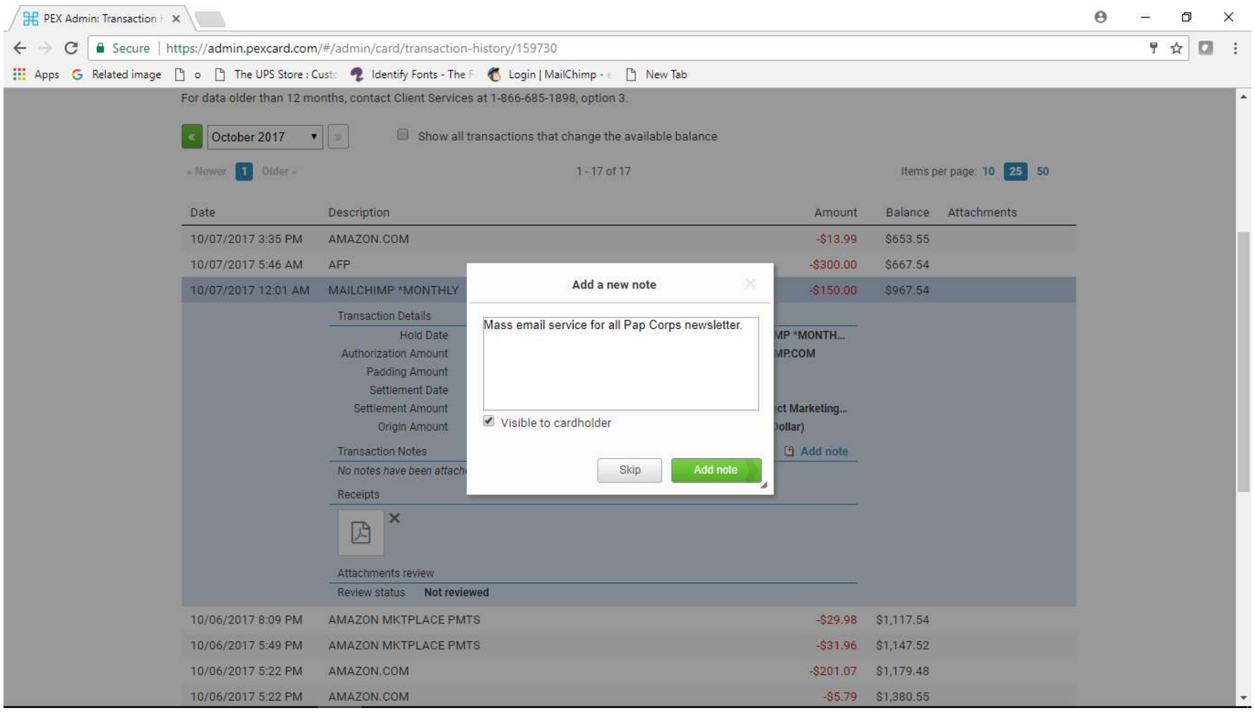
4. Enter Login credentials
5. Click on the card you want to work on
6. Select and click on a transaction
7. On the 'Detail' window, click on 'Add receipt'



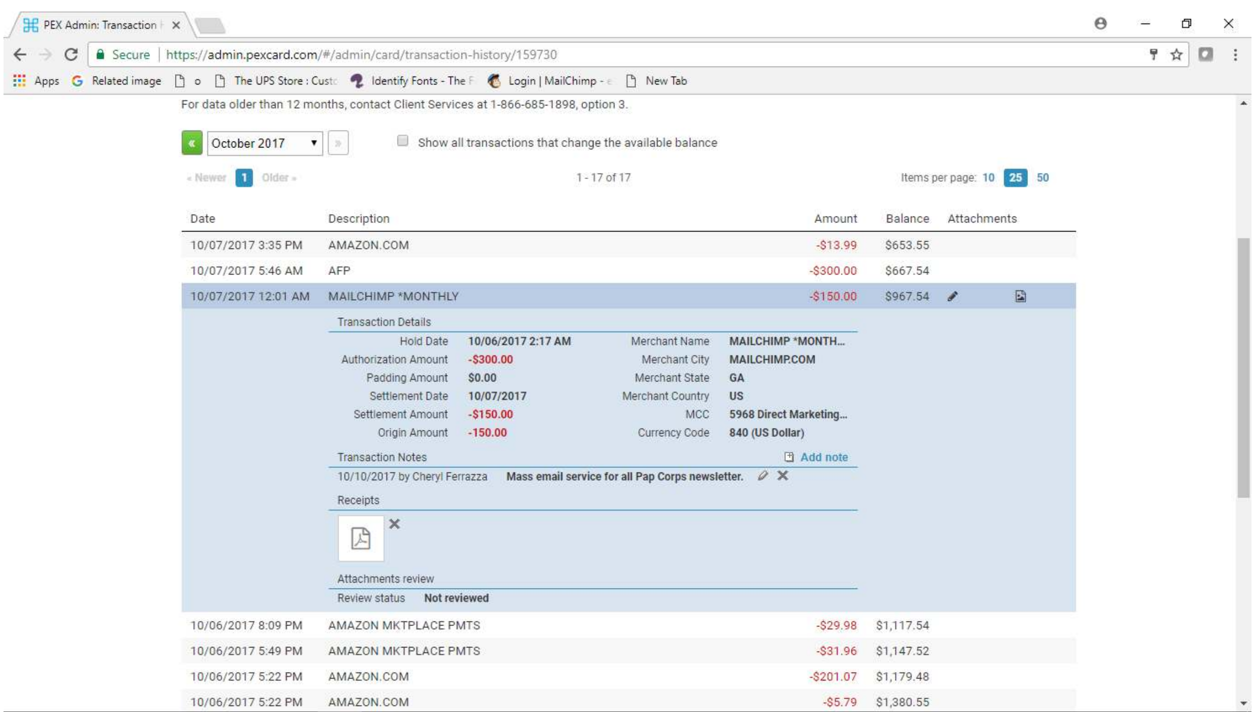
8. Navigate to the folder where you have saved your scanned receipts
9. Select the receipt you want to upload and click ‘Open’



10. Click ‘Attach’
11. The ‘Note’ window will come up, please type in the description for this transaction (add an event or appeal code if you have one), and check the box that says “Visible to cardholder”

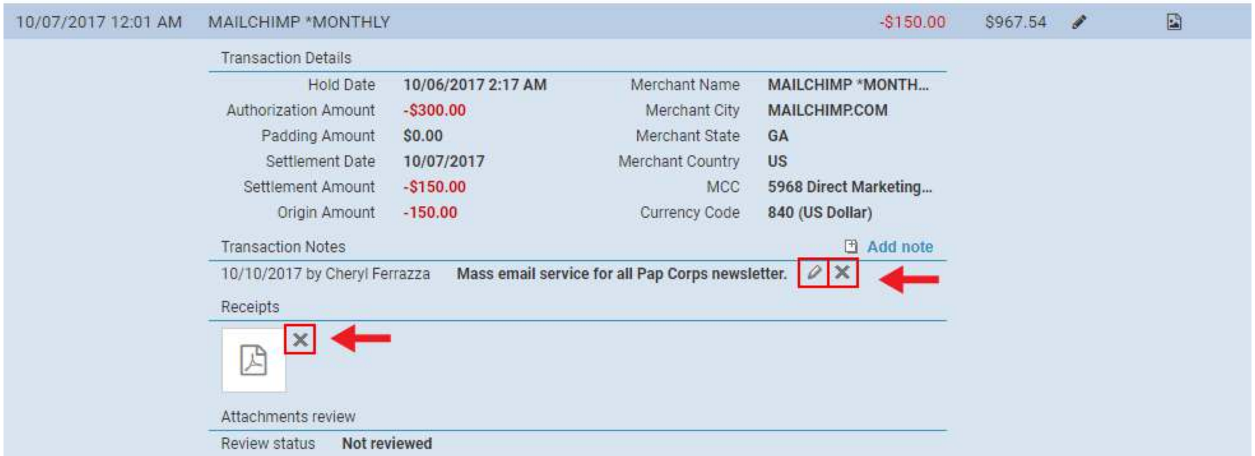


12. Click the 'Add note' button
13. You will now see your receipt and the note displayed on the 'Detail' window



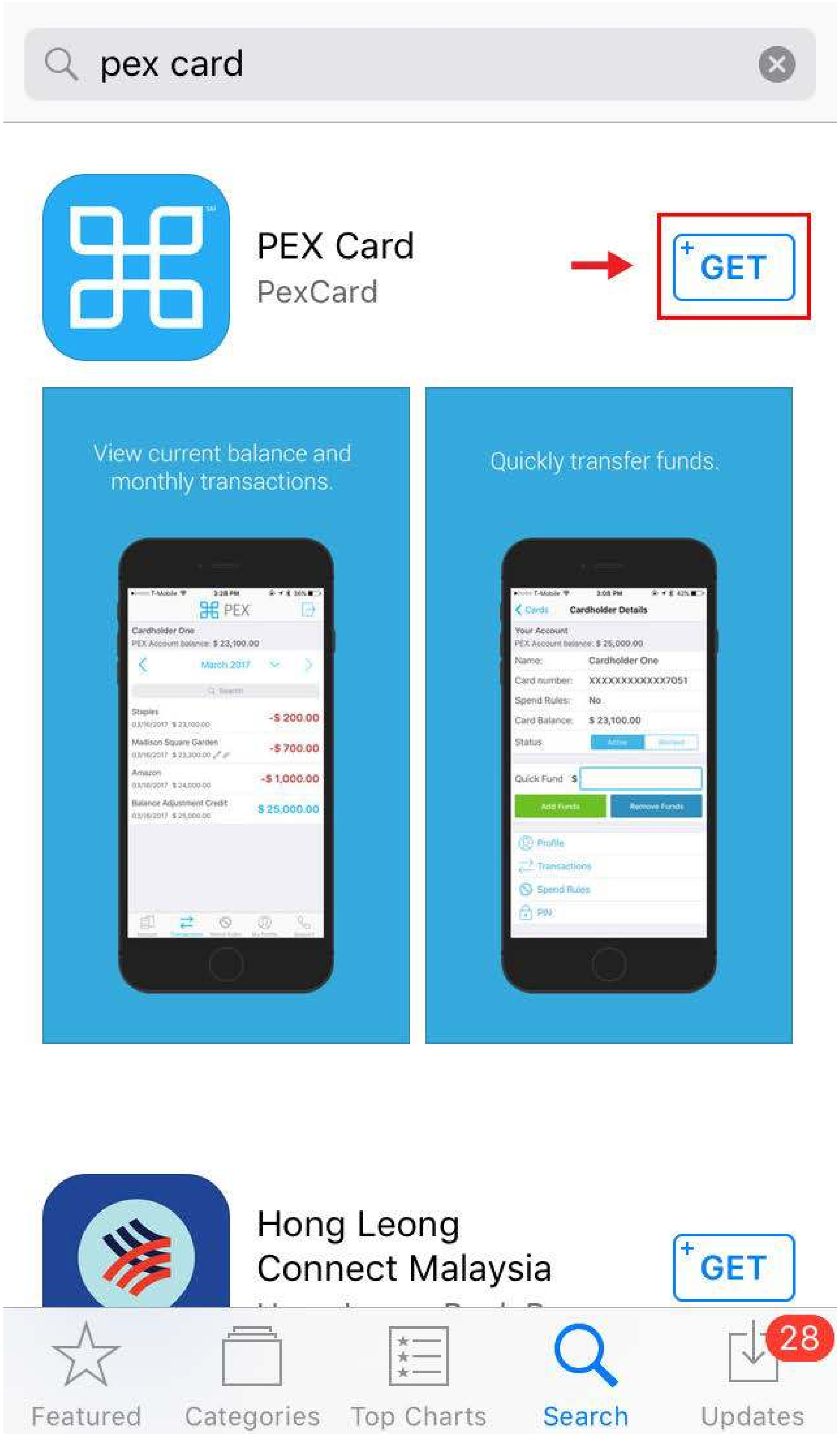
How to Edit or Delete a Note

1. If you need to edit the note, click on the 'pencil icon'. After your edits are complete, click on the 'Update note' button.
2. If you need to delete the note or the receipt click on the 'X' next to each one.

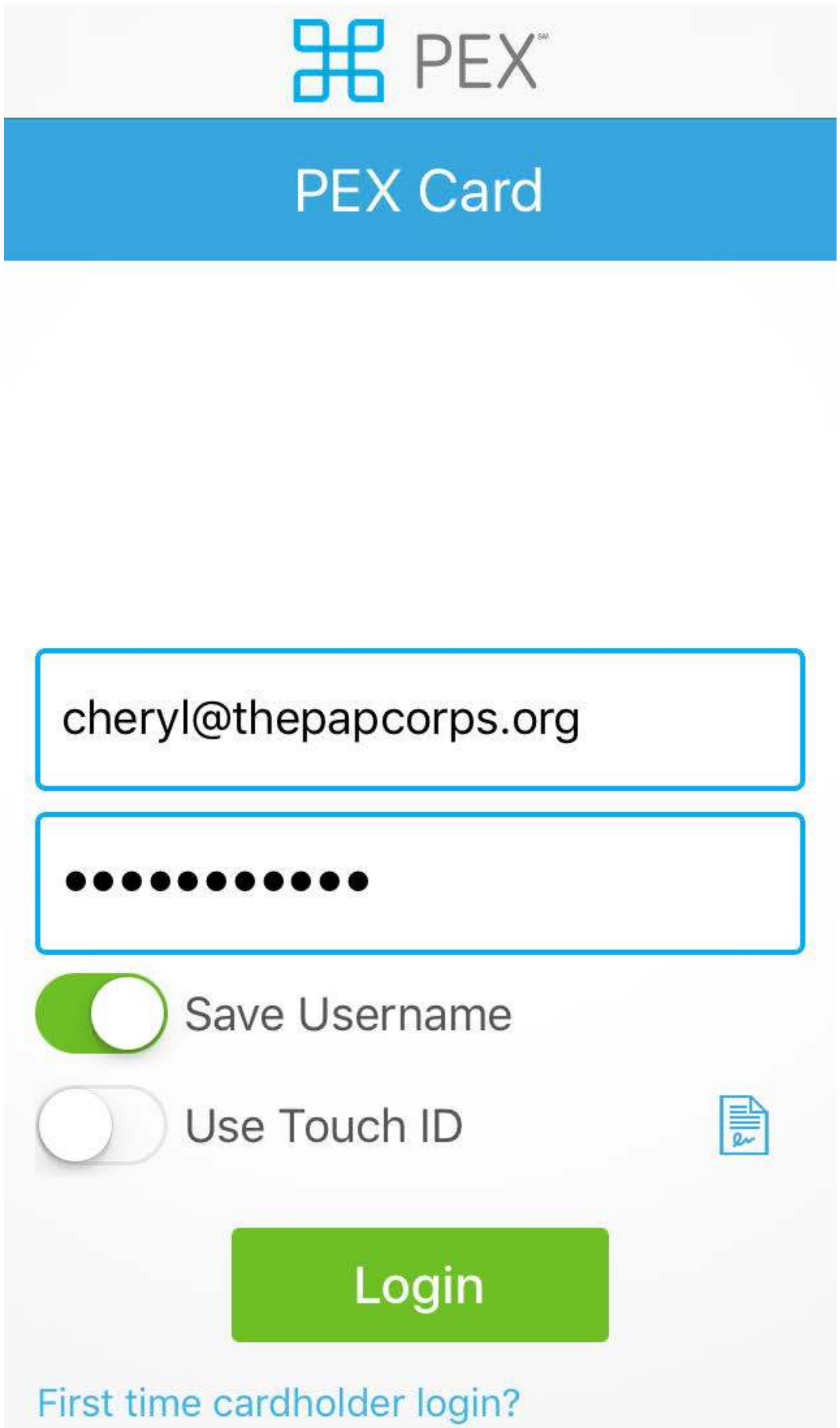


Prepare Pex Card Report with the App on Your Smartphone

1. On your iPhone, go to the App Store. On your Android go to Google play.
   - This tutorial is illustrated using an iPhone device, but the process should be similar on an Android phone
2. Enter "Pex Card" in the search bar
3. Press the "Get" button to download
   - The official Pex Card app should have the Pex Card logo

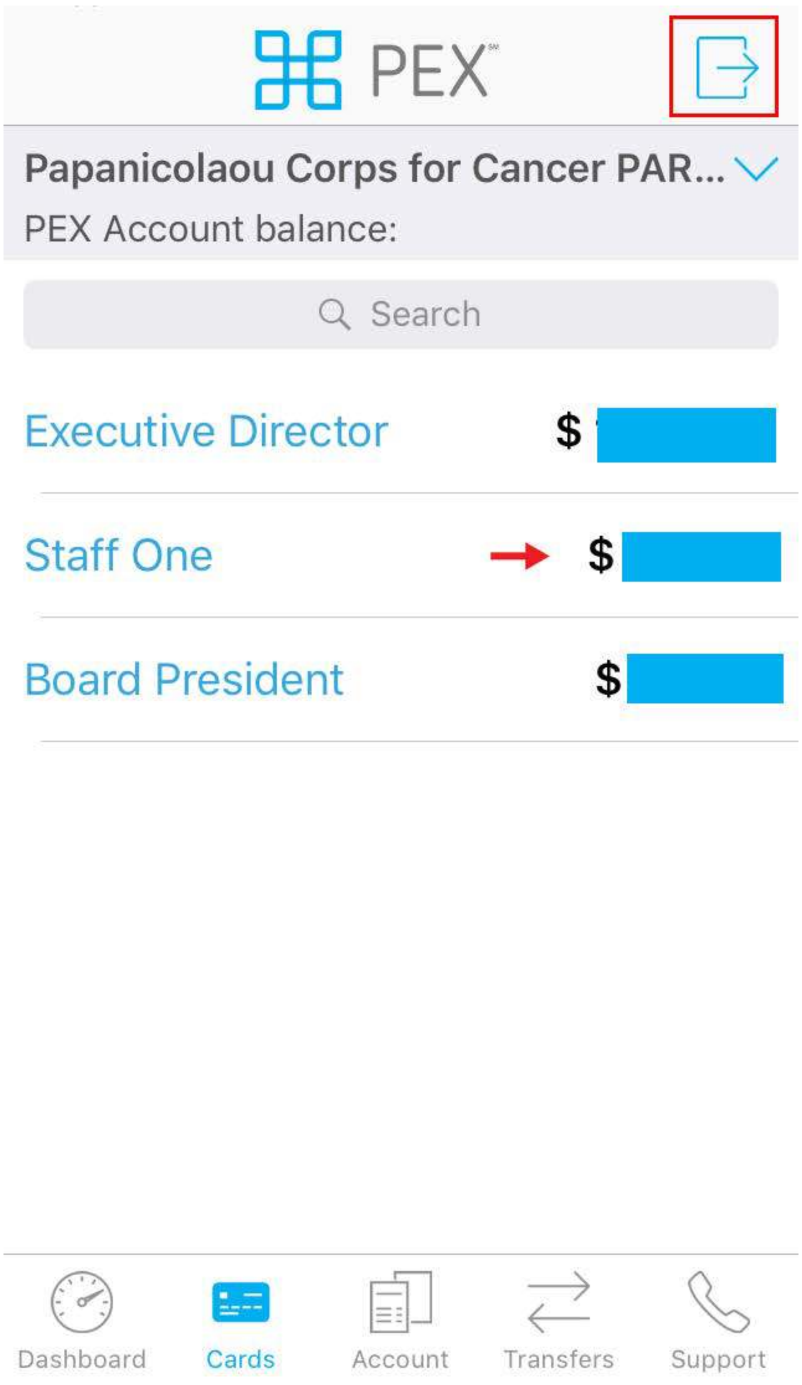

pex card
PEX Card
PexCard
GET
View current balance and monthly transactions.
Quickly transfer funds.
Hong Leong Connect Malaysia
GET
Featured
Categories
Top Charts
Search
Updates
28

4. Login to your Pex Card account
    - You can use the 'Save Username' or 'Use Touch ID' options so you don't have to enter it every time



After login, you will see all of your available cards

5. Select and press on the card you want to work on. In this example, we use cardholder 'Staff One'

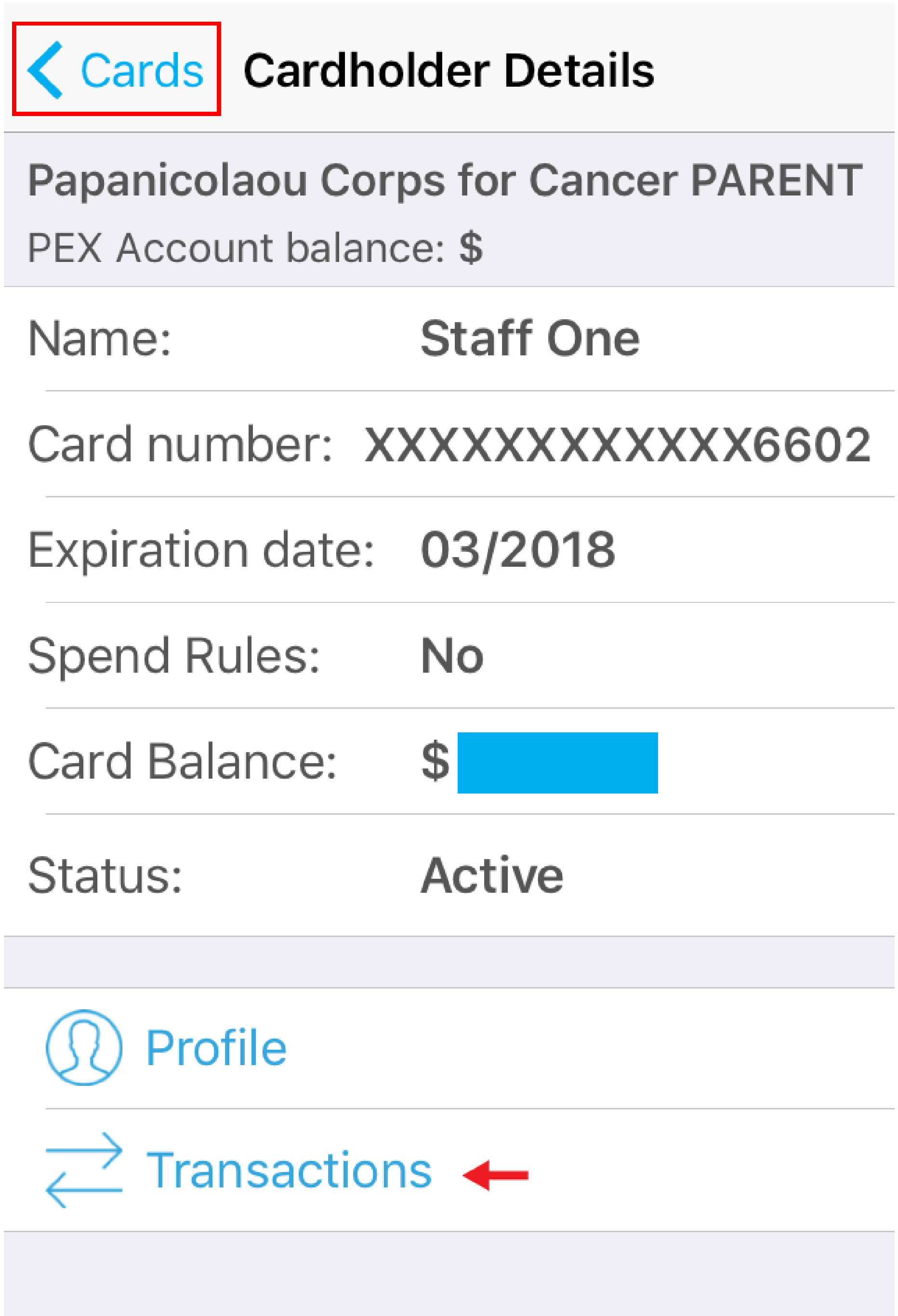


You will notice, at the bottom of the screen you have buttons you can use to navigate your accounts just as if you were on the Pex Card website on your desktop computer.

You can use the button on the top right corner to log out of your account at any time.

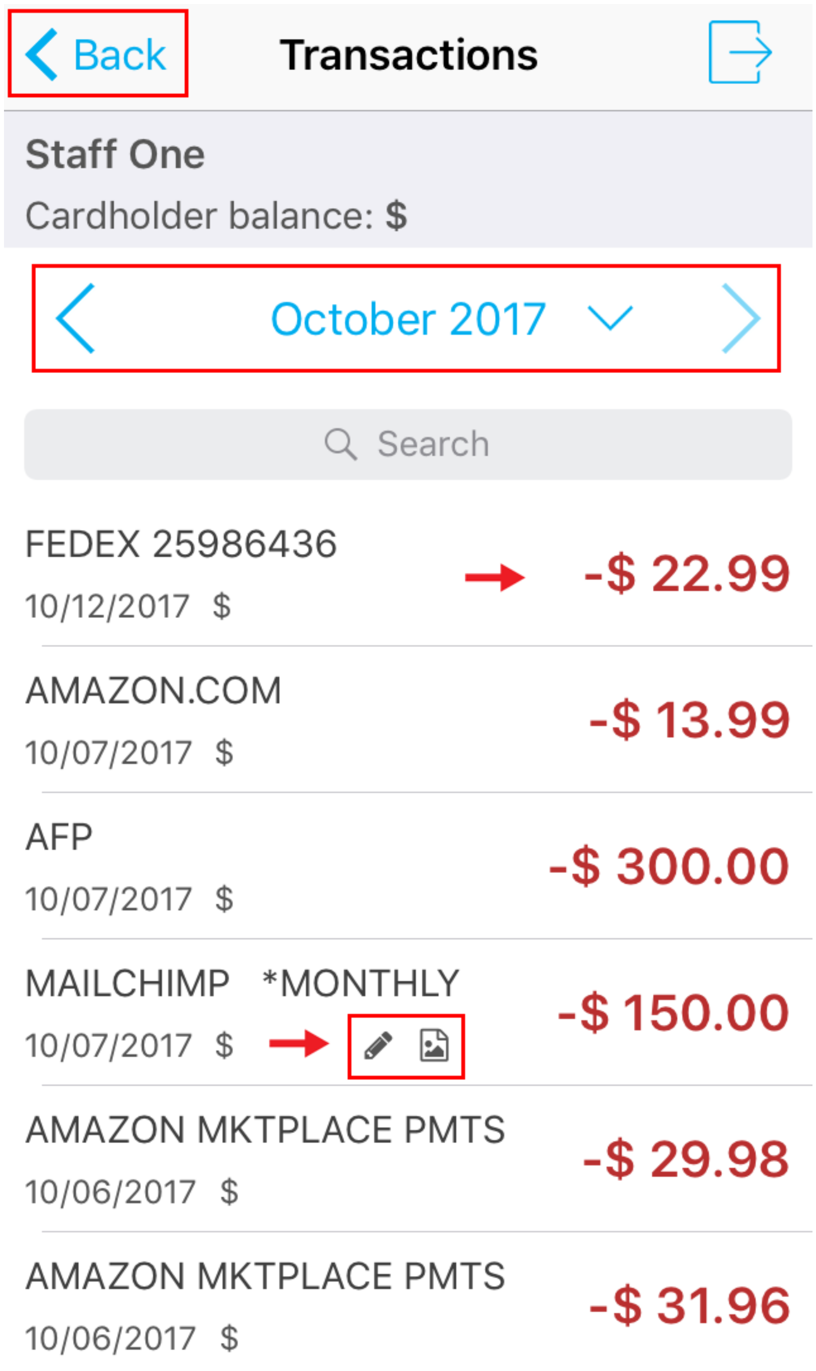
From the Cardholder Details page, you can navigate to the transactions for that card

6. Press Transactions at the bottom of the page



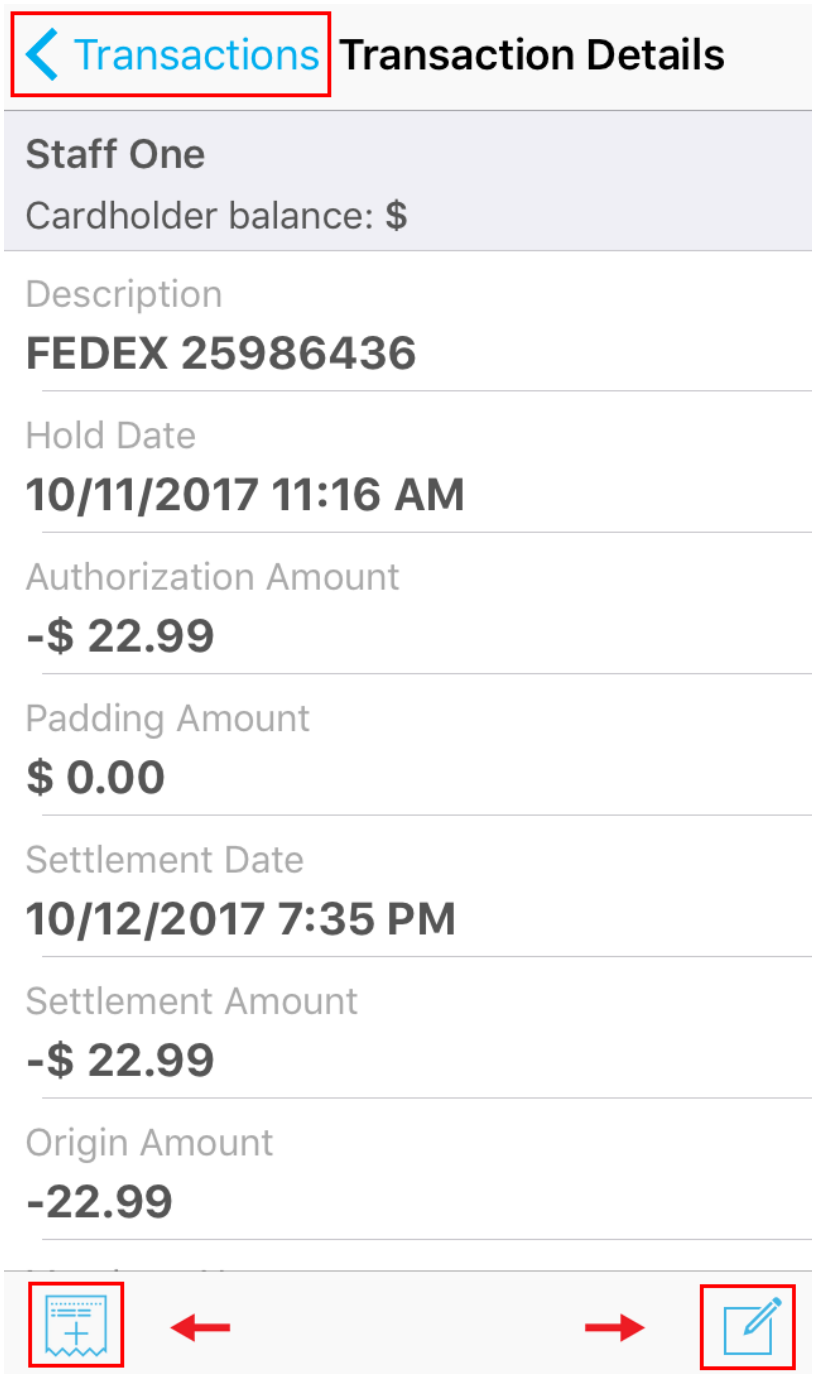
If you need to go back to the Cards page, you can always click on the Cards button on the top left corner of this page.

7. On the Transactions Page, press on the transaction you want to upload a receipt or add a note to. In this example, we use a FEDEX transaction for $22.99



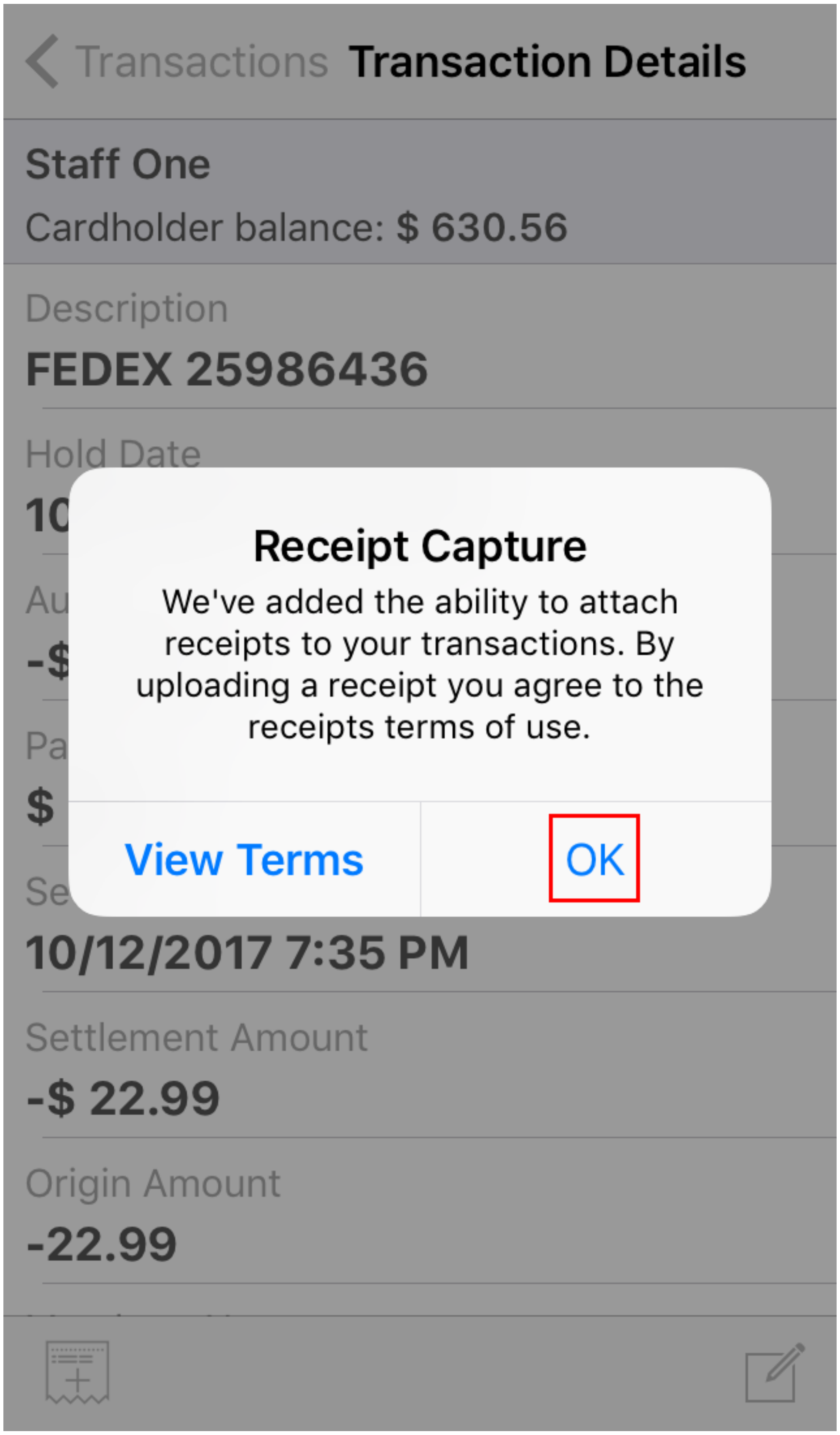
You can find transactions by doing a search on the search box, or you can navigate to different months by using the arrows or the dropdown calendar. You can also use the back button to return to the previous page. Notice that transactions for which you have already uploaded a receipt or added a note to, will display the 'pencil' and 'picture' icons. You can press those to edit or delete.

8. On the Transaction Details page, you can press the Receipt button on the bottom left to upload your receipt.
    - If you don't have a receipt, you can still add a note by pressing the Note button on the bottom right

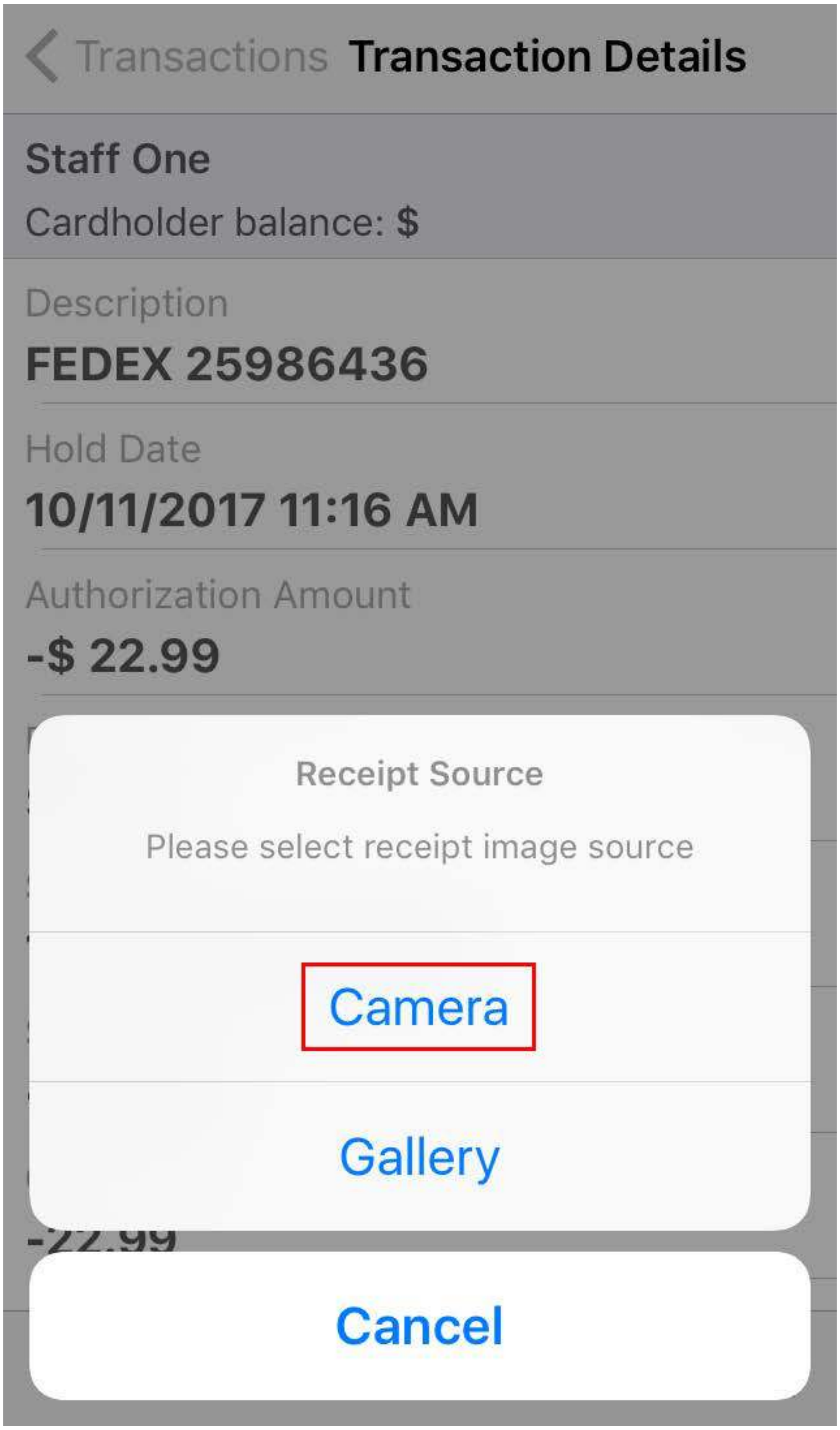


You can always go back to the previous page by pressing the Transactions button on the top left.

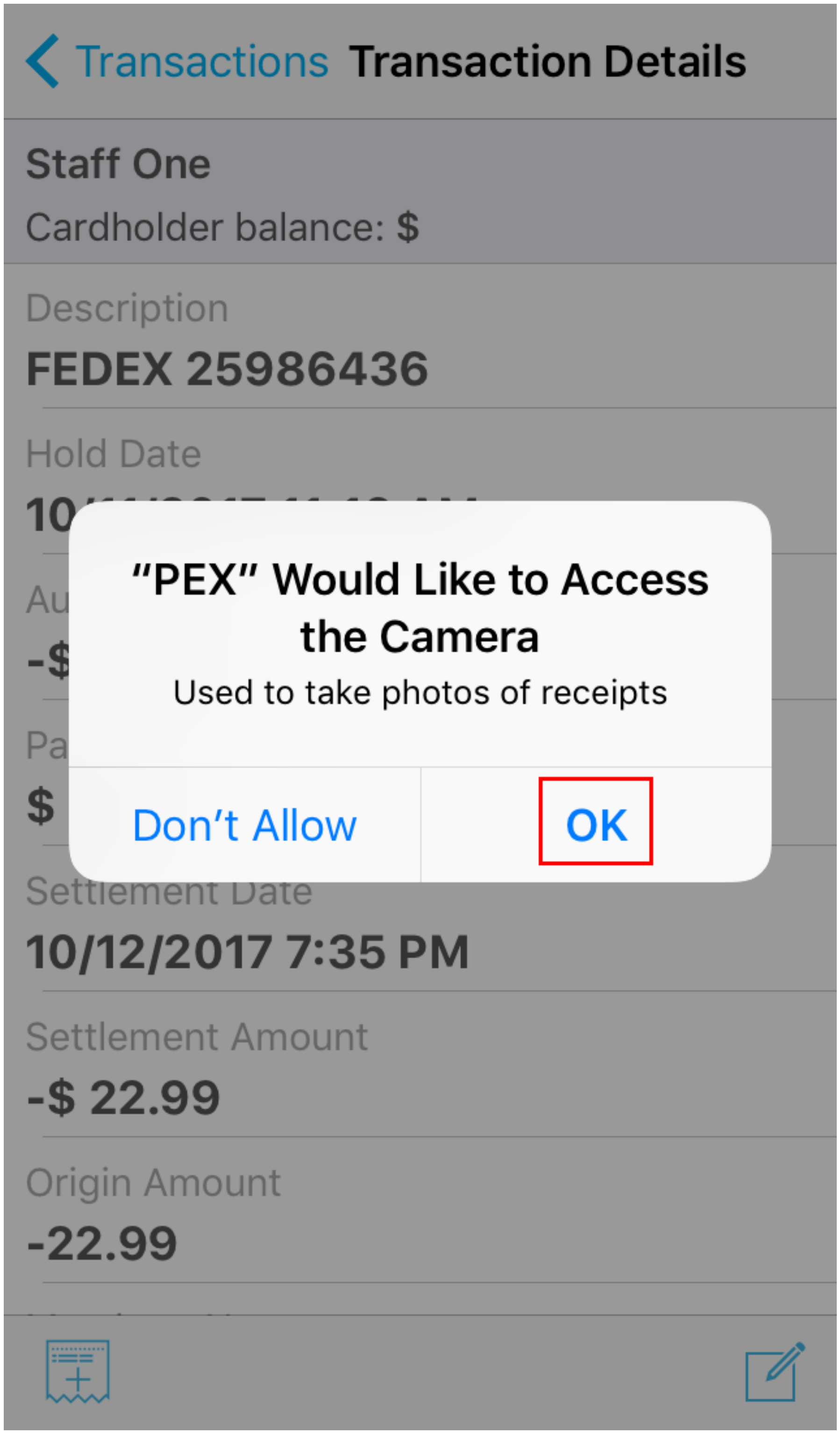
9. If this is the first time you are using the receipt upload feature on your mobile device, the Receipt Capture Terms window will come up. Press OK. This window will not come up again after you accept the terms.



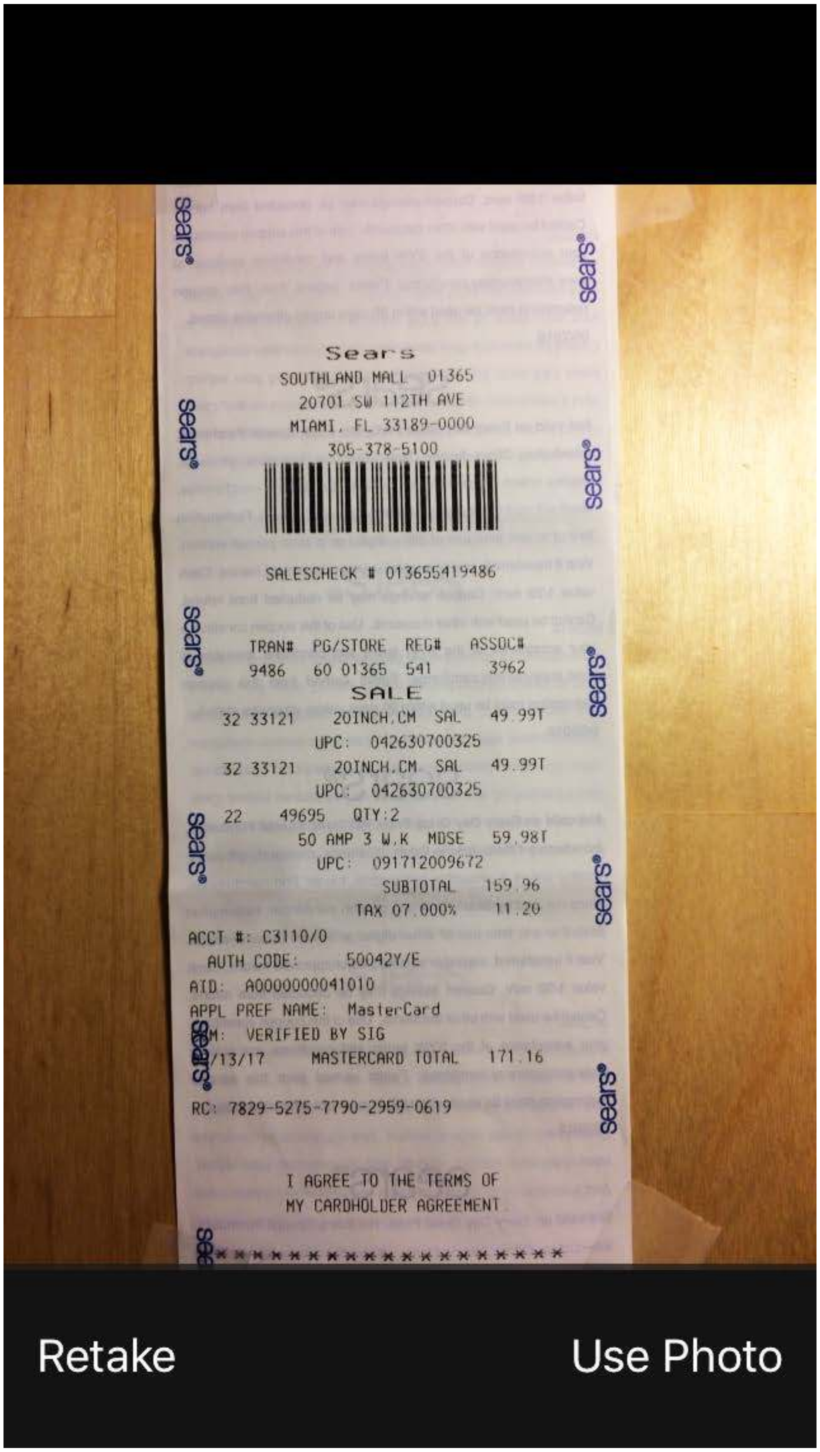
10. You will now have the option of uploading your receipt using your phone's Camera or the Gallery. In this example, we will show how to use your Camera to take a photo of your receipt. Using the Gallery option is almost the same process, and you would use it if you have already taken a photo of your receipt. Press Camera.



11. If this is the first time you are using the camera in this app, it will now ask for permission to access your Camera. If you were using the Gallery method, it would ask for permission to access your Photos. Press OK.

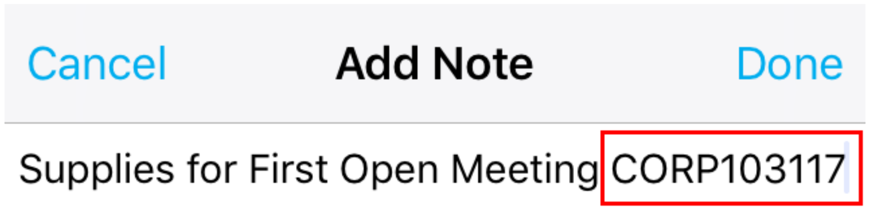


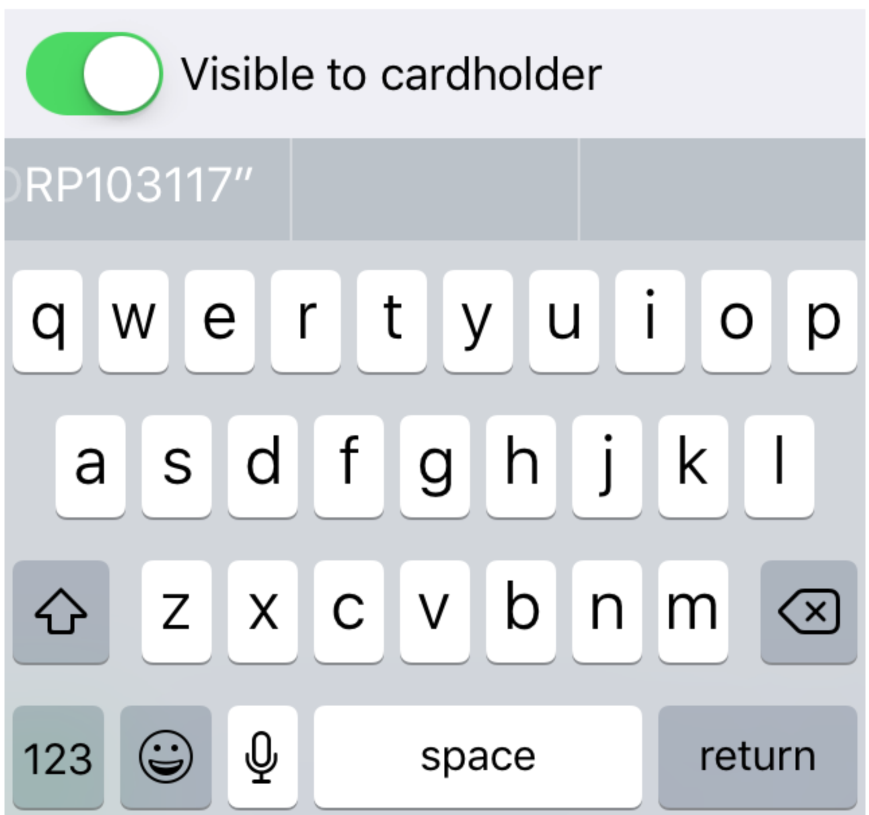
12. Place your receipt on a flat surface, make sure that the lighting is good, and take the photo.
13. If you are satisfied with the photo press Use Photo at the bottom of the page, if not Retake.



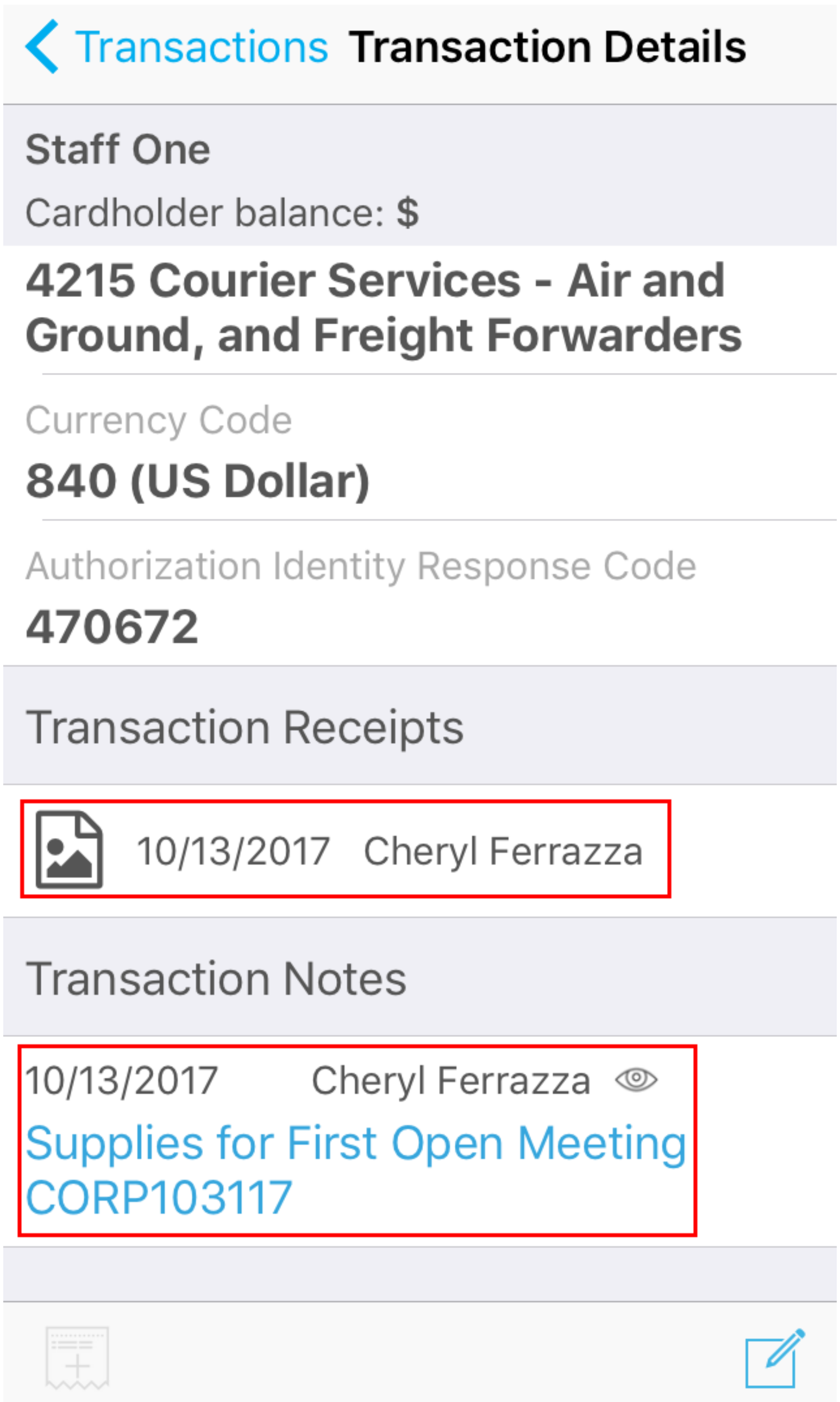
If you were using the Gallery method, you would now be at your Photos window where you would select Camera Roll, and then the photo you would like to upload.

14. After pressing the Use Photo button, the Add Note window will come up automatically. Write a short description here. If you have an event ID, please add it. Press the Visible to cardholder button. When you finish press Done on the upper right corner.

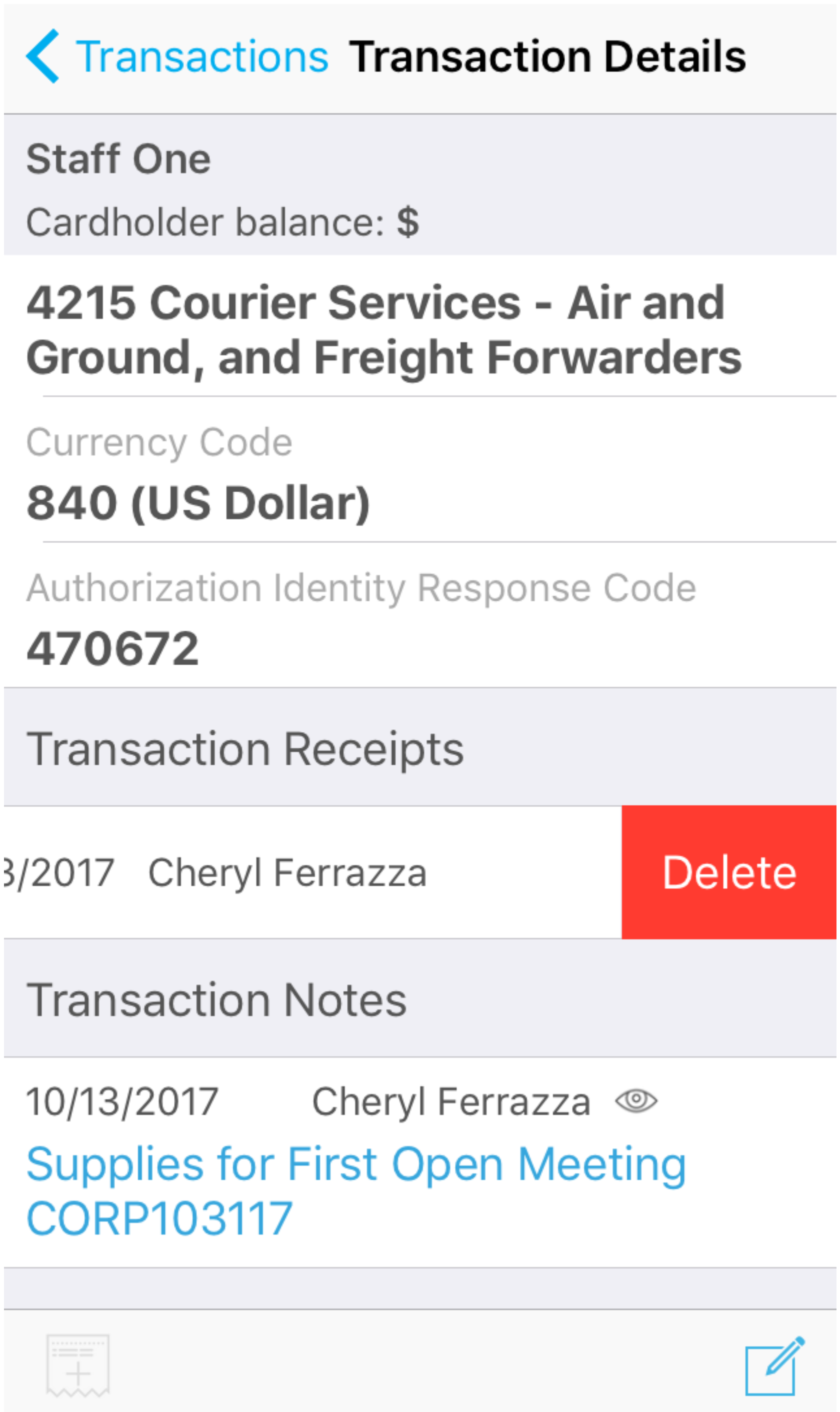




15. After pressing Done, the Transaction Detail page will come up. Here you will see the icon for the uploaded receipt, as well as a link to the note you just added. You can click on the receipt to preview, or you can click on the note link if you would like to edit it.

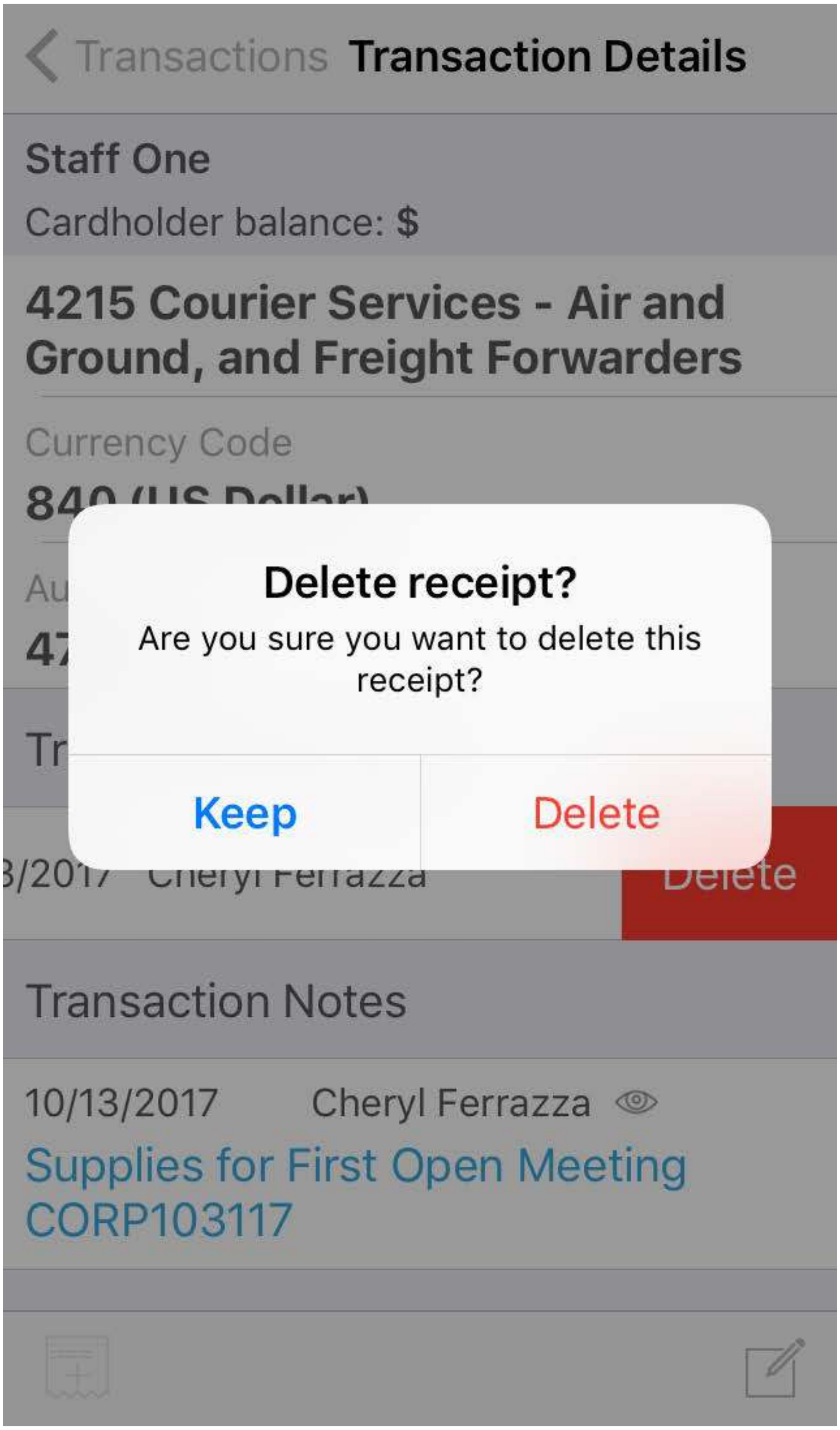


16. If you need to delete the receipt or the note, swipe left on either entry.
17. Press the red Delete button.



In this example, we are deleting the receipt, but deleting the note is the same process.

18. Confirm that you want to delete the receipt. Press Delete.



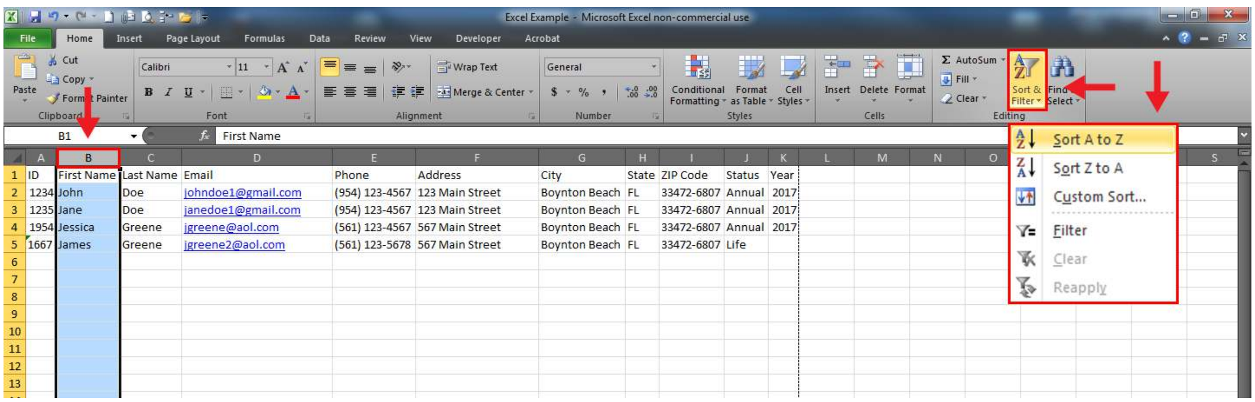
You can now repeat this process for every transaction.

How To: Use Excel to Manipulate Spreadsheets

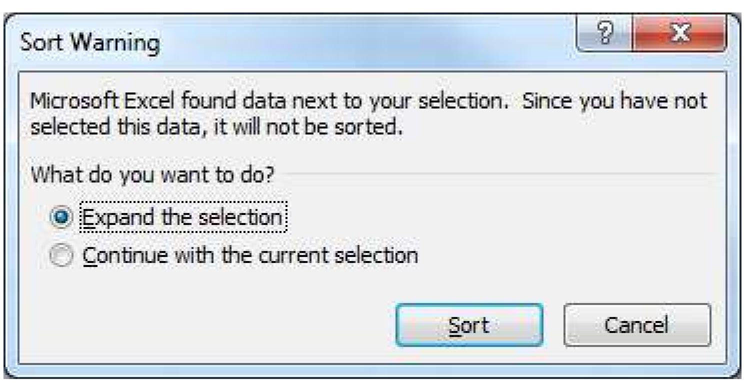
Sorting an Excel Spreadsheet

Sort by Column

1. If you only want to sort by one column, first select the column you wish to sort by clicking on the column header
2. Then click "Sort and Filter" on the top right on the menu.
    - To sort in alphabetical/numerical order, click "Sort A to Z" or "Sort Smallest to Largest".
    - To sort in reverse alphabetical/numerical order, click "Sort Z to A" or "Sort Largest to Smallest".

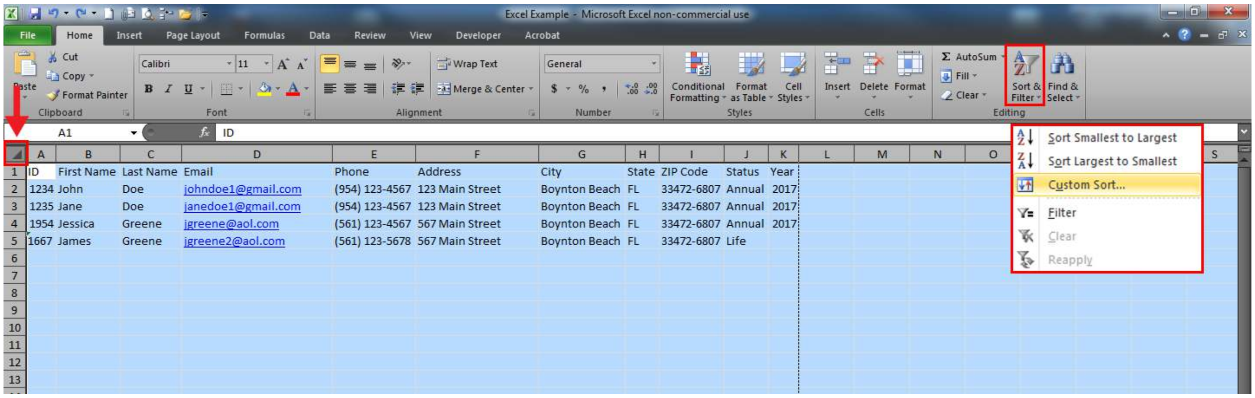


3. Select "Expand the selection" to ensure it sorts all the data, then click Sort. Choosing "Continue with the current selection" will only sort that one column, and your data will no longer match up.

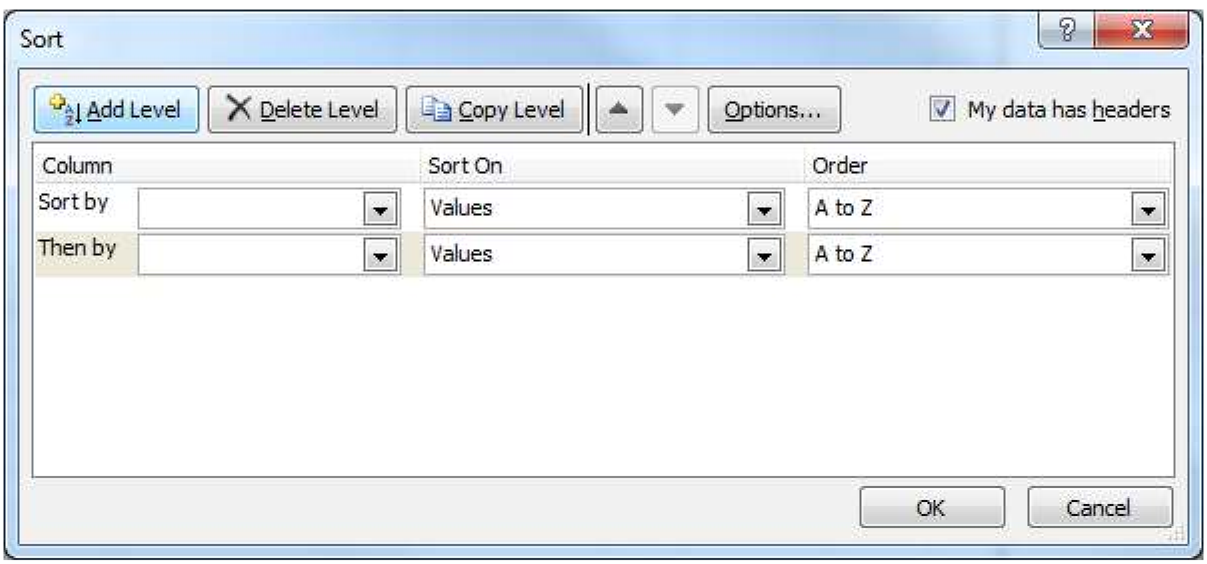


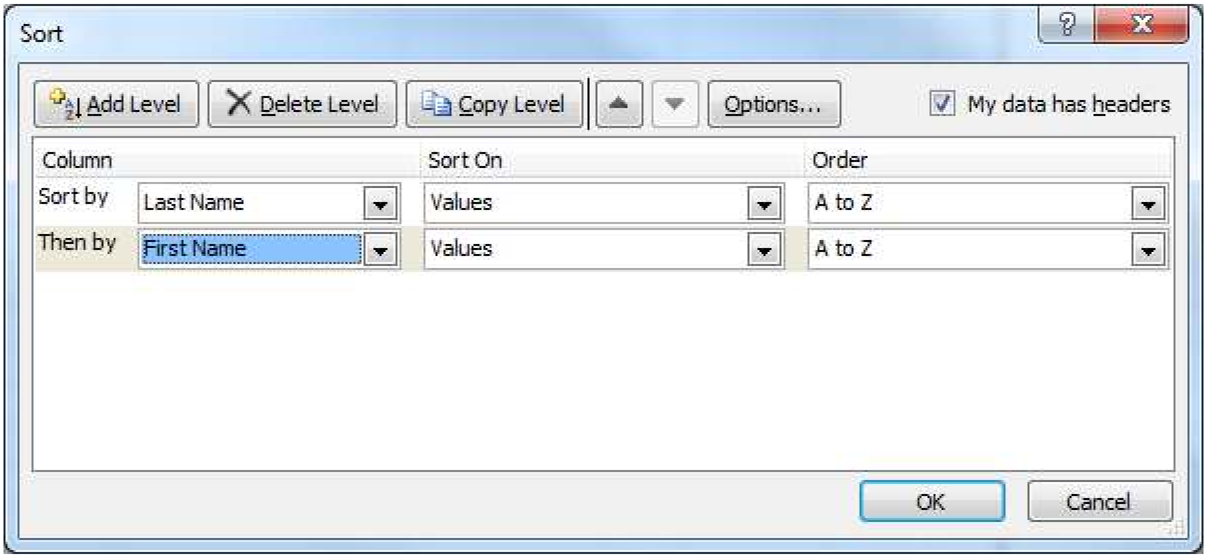
Sort by Multiple Fields

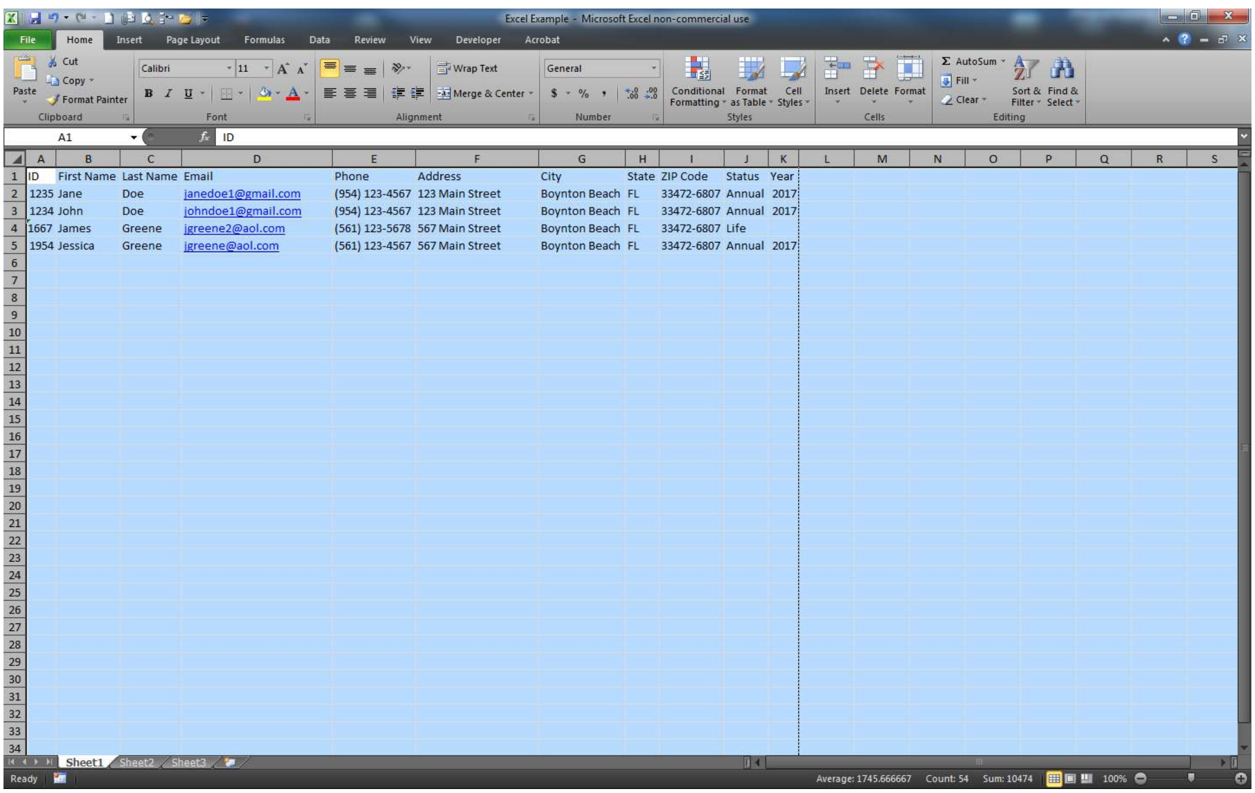
1. To sort by multiple fields, click on Sort and Filter and select Custom Sort. For this kind of sort you can select the entire spreadsheet by clicking in the upper left corner before clicking Custom Sort. If you don't, that's okay – just choose Expand the Selection again.



2. In the Custom Sort box, select "Add Level" until there are as many levels as you want to sort by. Make sure "My data has headers" is checked so that the top row doesn't get sorted. For this example, we are going to sort the data by Last Name, then First Name, but you can use any combination – you can even sort by font or cell color instead of the values.



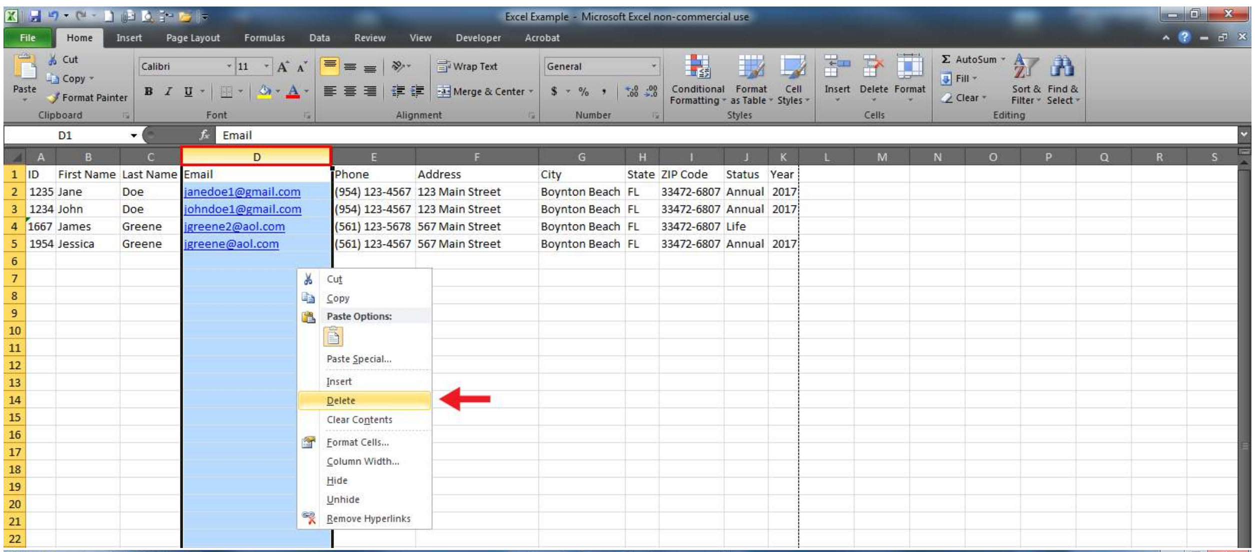

Sort
Add Level
Delete Level
Copy Level
Options...
My data has headers
Column
Sort On
Order
Sort by
Last Name
Values
A to Z
Then by
First Name
Values
A to Z
OK
Cancel

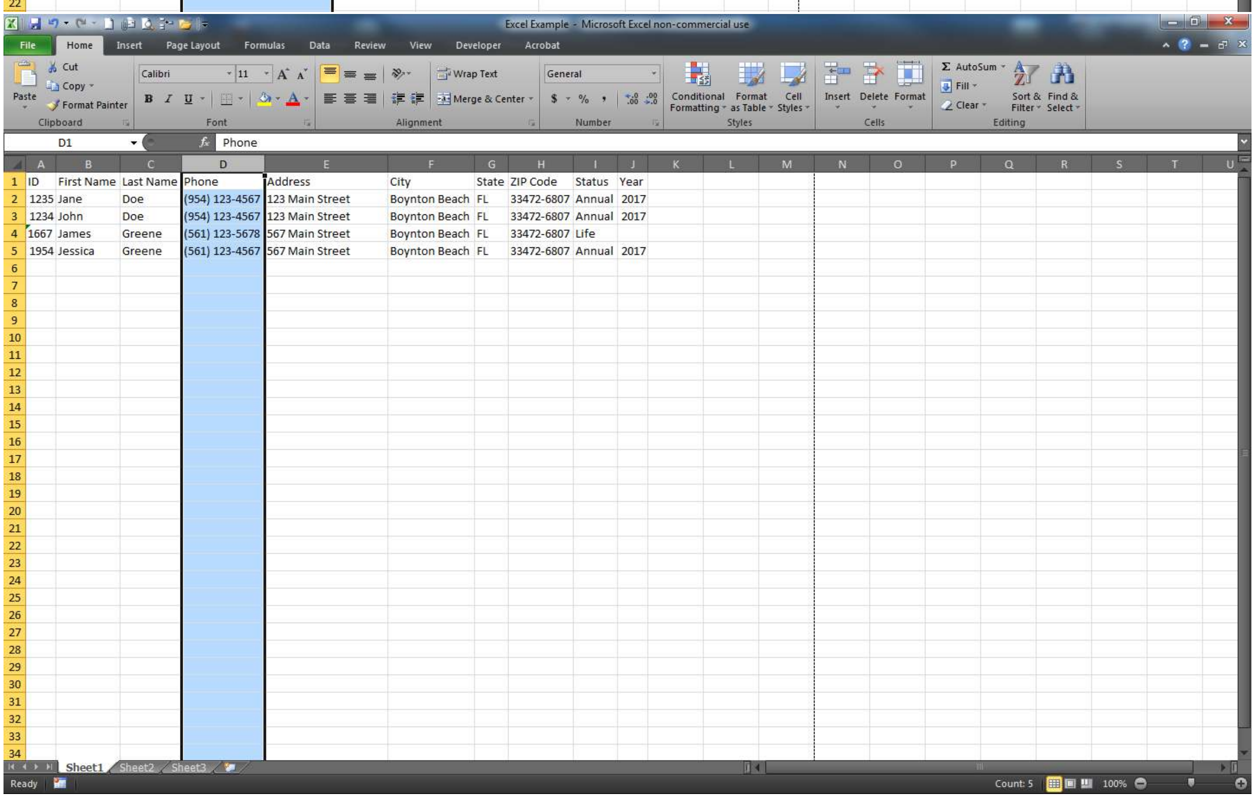

Excel Example - Microsoft Excel non-commercial use
ID First Name Last Name Email Phone Address City State ZIP Code Status Year
1235 Jane Doe janedoe1@gmail.com (954) 123-4567 123 Main Street Boynton Beach FL 33472-6807 Annual 2017
1234 John Doe johndoe1@gmail.com (954) 123-4567 123 Main Street Boynton Beach FL 33472-6807 Annual 2017
1667 James Greene jgreene2@aol.com (561) 123-5678 567 Main Street Boynton Beach FL 33472-6807 Life
1954 Jessica Greene jgreene@aol.com (561) 123-4567 567 Main Street Boynton Beach FL 33472-6807 Annual 2017
Sheet1
Sheet2
Sheet3
Ready
Average: 1745.666667 Count: 54 Sum: 10474

Deleting/Adding Rows and Columns

Delete a Column

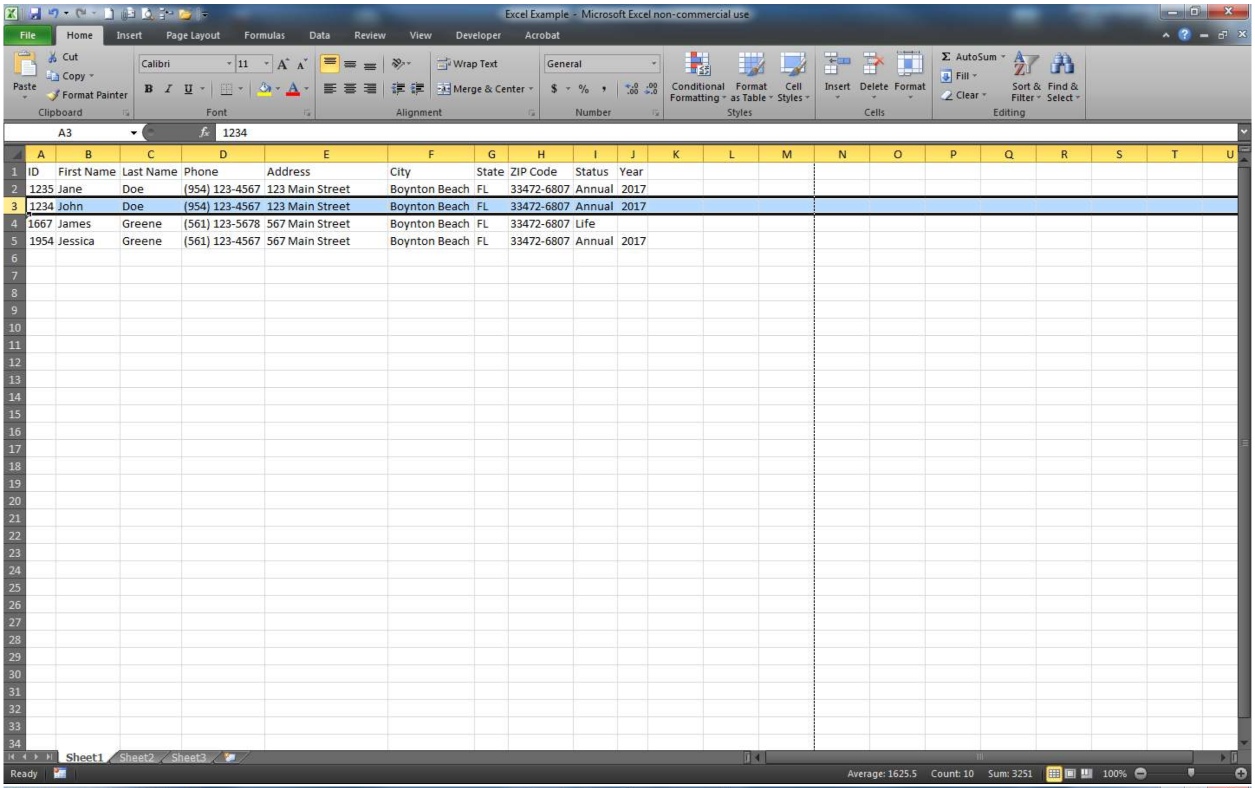
1. To delete a column, click on the column header to select the entire column.
2. Then right-click on the selection and left-click on "Delete".
    - This will remove the column entirely – if you only wish to remove the data in it, click on "Clear Contents" instead.

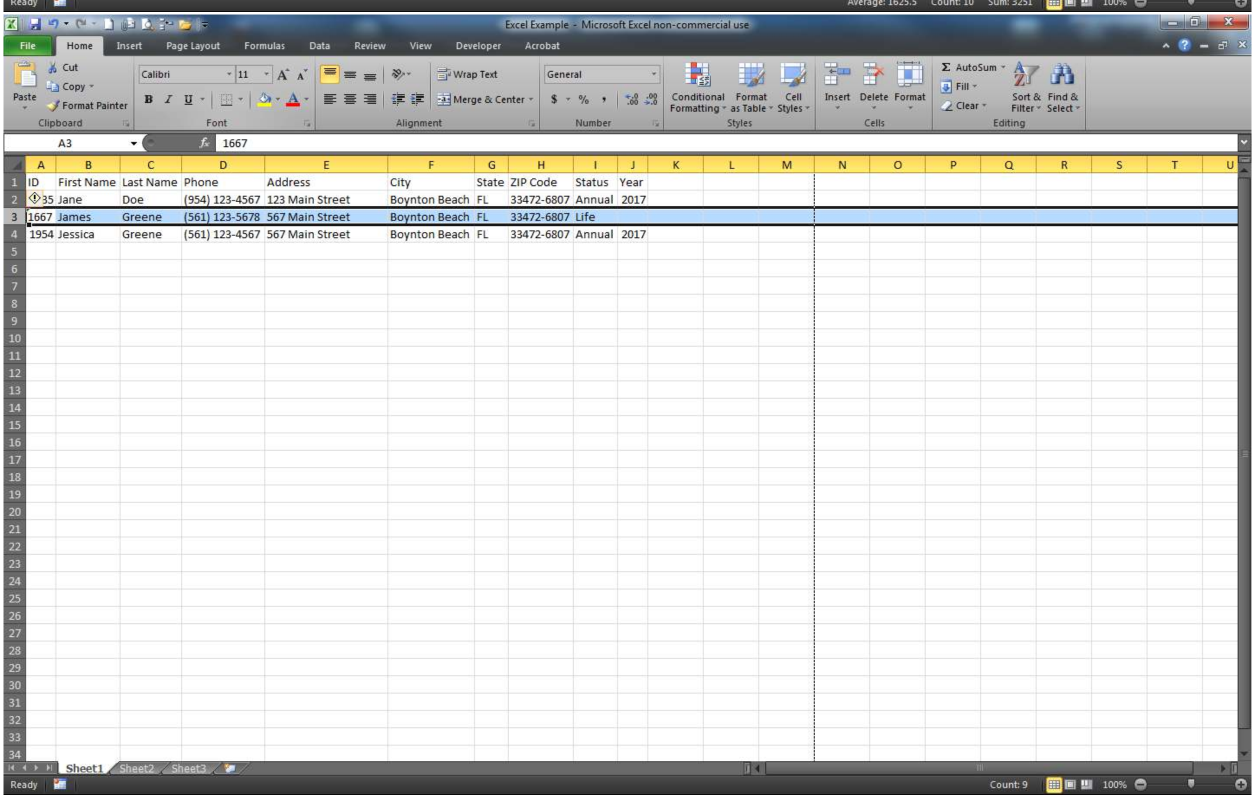




Delete a Row

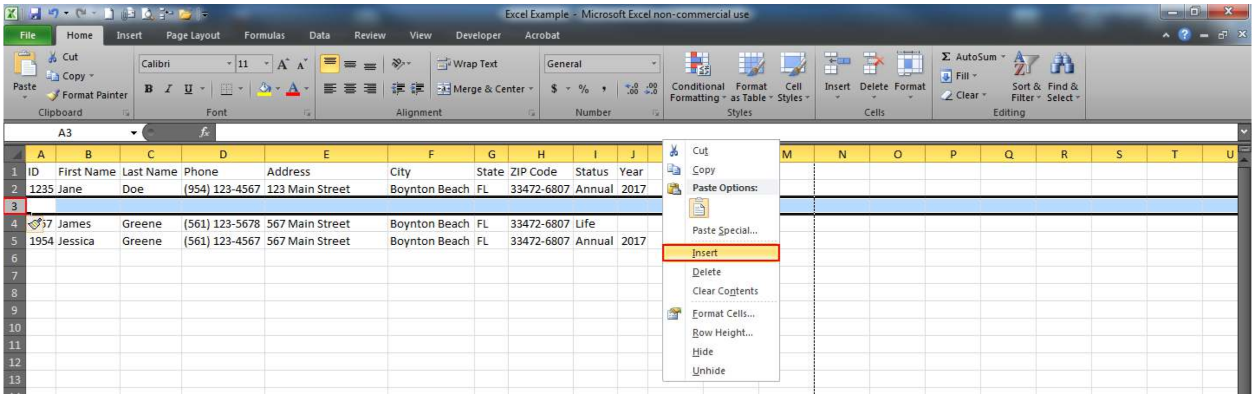
To delete a row, the procedure is the same. Click on the number representing the row to select the entire row, then right-click on the selection and choose “Delete”.





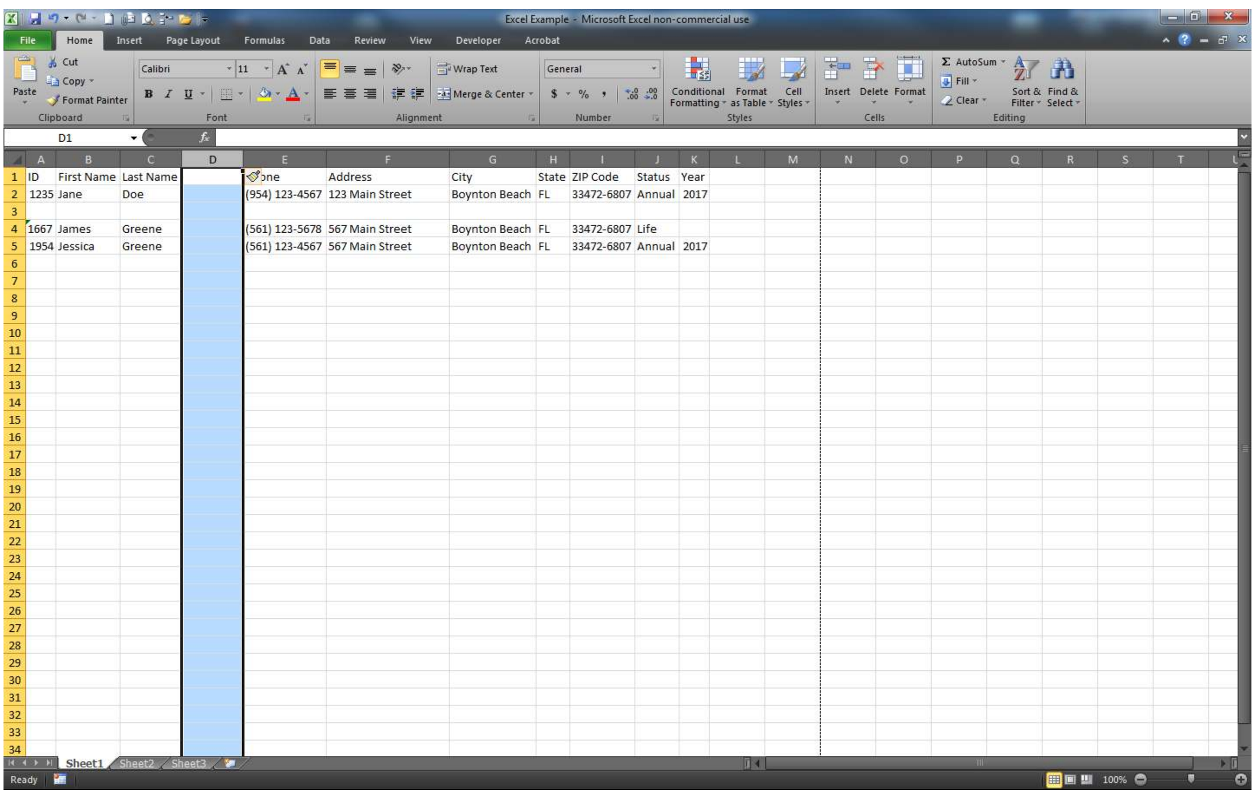
Adding a Row

1. To add a row or column, right-click on the row that you want the new row to be above, or the column that you want the new column to be to the left of. With the above row of James Greene selected, we insert a new row by right-clicking on it and selecting “Insert”.



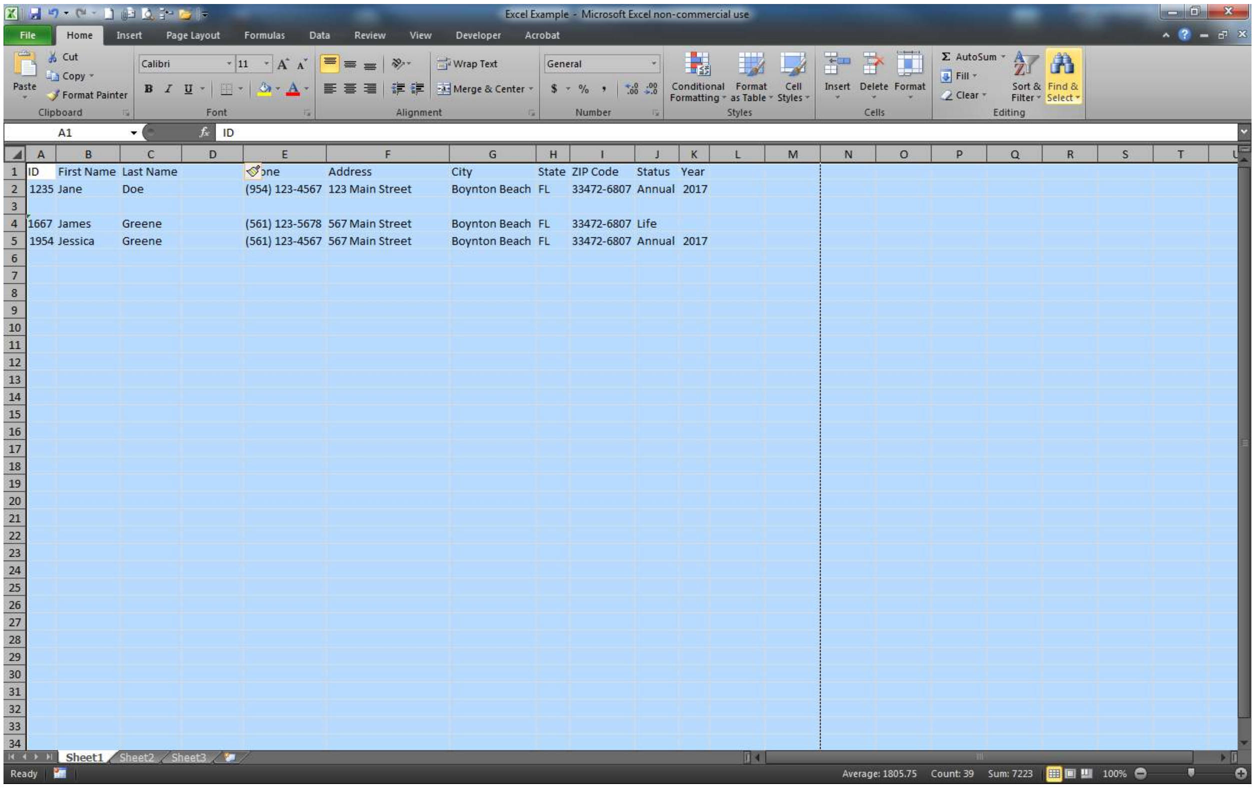
Inserting a Column

2. Inserting a column works the same way. Below is the result when we insert a column after selecting the “Phone” column.

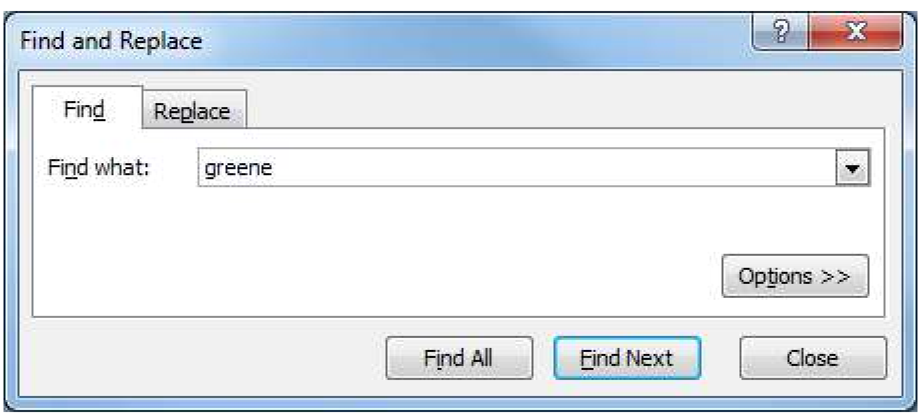


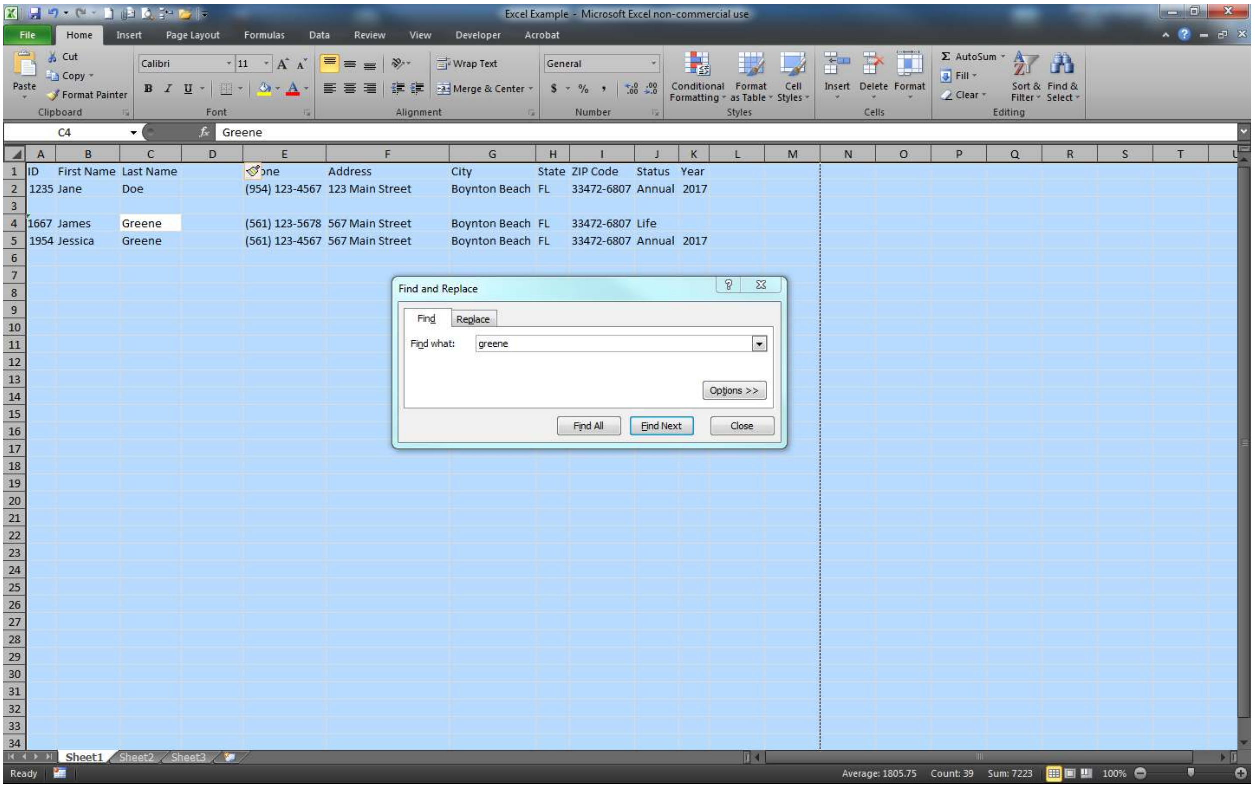
Finding Data

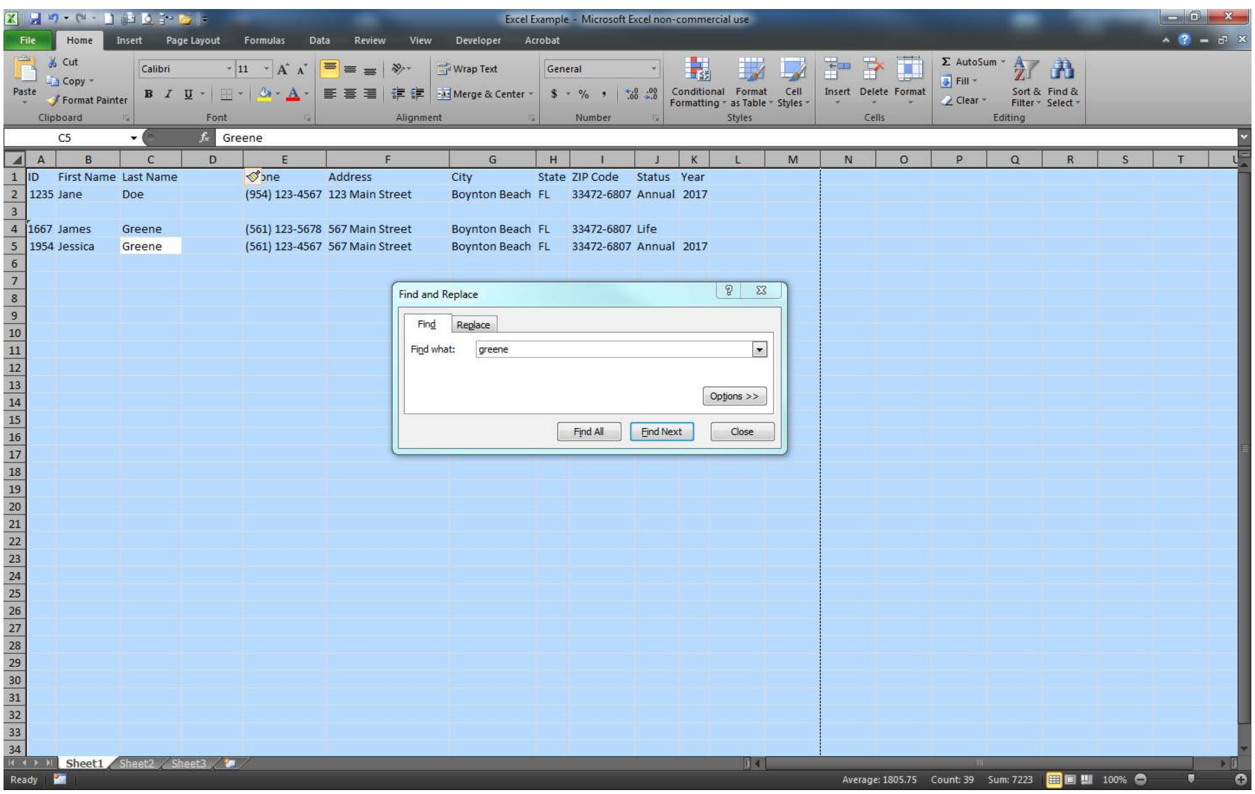
1. To find a specific piece of data, first select the entire spreadsheet by clicking on the upper left corner again, between 1 and A.
2. Then click on Find and Select and choose "Find".



3. Enter the data you wish to find
4. Click on "Find Next".
   - The field containing the data you were looking for will be highlighted. If there is more than one instance of that piece of data, choosing "Find Next" again will go to the next matching cell.



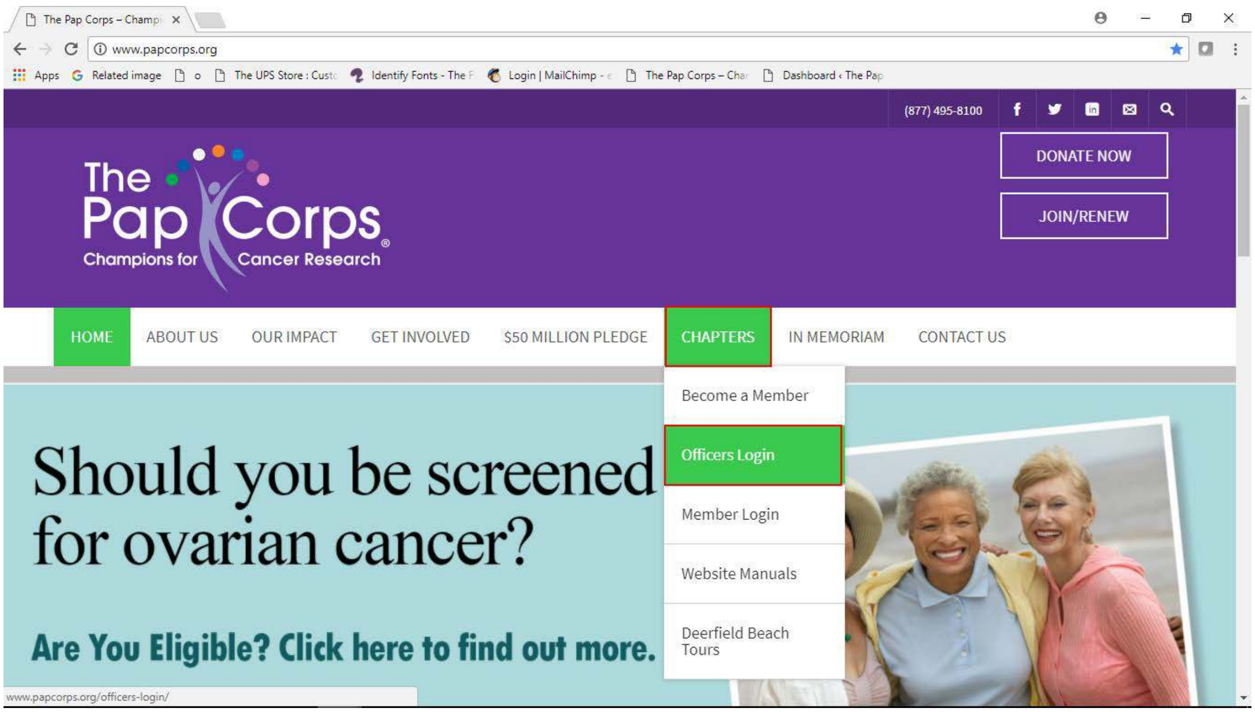

Excel Example - Microsoft Excel non-commercial use
Find and Replace
Find
Replace
Find what:
greene
Options >>
Find All
Find Next
Close
ID First Name Last Name
1235 Jane Doe (954) 123-4567 123 Main Street Boynton Beach FL 33472-6807 Annual 2017
1667 James Greene (561) 123-5678 567 Main Street Boynton Beach FL 33472-6807 Life
1954 Jessica Greene (561) 123-4567 567 Main Street Boynton Beach FL 33472-6807 Annual 2017


Excel Example - Microsoft Excel non-commercial use
Find and Replace
Find
Replace
Find what:
greene
Options >>
Find All
Find Next
Close
ID First Name Last Name
1235 Jane Doe (954) 123-4567 123 Main Street Boynton Beach FL 33472-6807 Annual 2017
1667 James Greene (561) 123-5678 567 Main Street Boynton Beach FL 33472-6807 Life
1954 Jessica Greene (561) 123-4567 567 Main Street Boynton Beach FL 33472-6807 Annual 2017

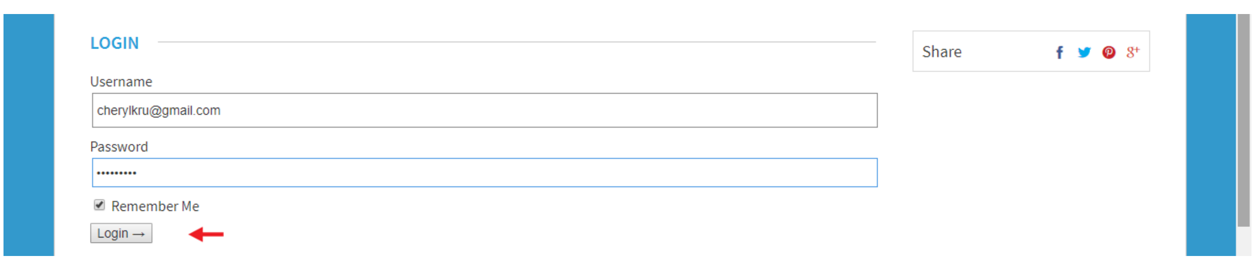
How to Access the 'Officers Only' Part of Our Website

Login

1. Go to www.thepapcorps.org
2. Hover over the 'Chapters' tab on the main menu
3. Click on 'Officers Login'



4. Enter your login information
5. Check the 'Remember Me' box
   - This will save your username and password so you don't have to type it in next time. Some browsers will skip the login window after checking this box and will log you in automatically. We will show you what to do if this happens.
6. Click the 'Login' button
7. This will automatically take you to the 'Forms' page where you can find all Deposit Summary forms, Membership forms, etc



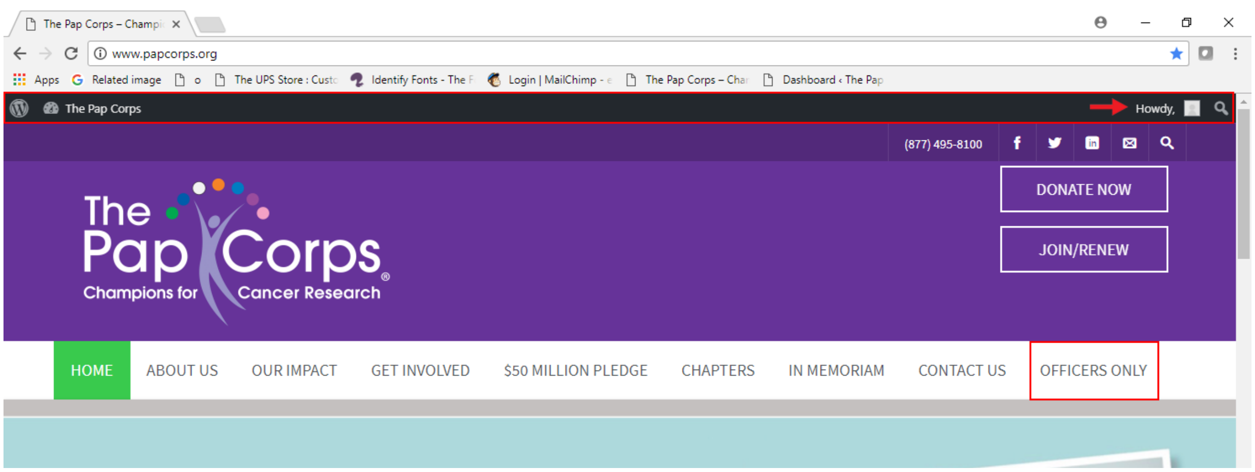
Skipping the Login Window – Return Users

It is possible, that if you have logged into our website before and have checked the 'Remember Me' box, you will be automatically logged in the next time you visit our site.

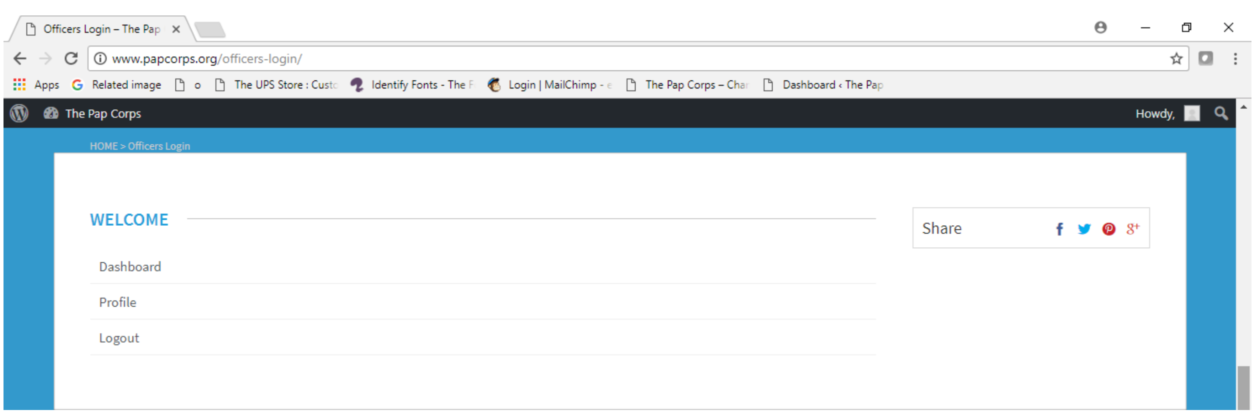
- Some browsers have built-in features that when activated will remember the passwords to all of the website you visit. If your browser has this, then it is possible that you will not be prompted with a login window when visiting our site, and you will be automatically logged in even if you haven't check the 'Remember Me' box before.

Identifying if you are already logged in to The Pap Corps website is easy:

- If you see a black toolbar at the top of the page with the word "Howdy" on the top right corner of the screen, this means you are already logged in
- If you already see the 'Officers Only' tab on the main menu, then you are already logged in



- If you click on the 'Officers Login' tab under the 'Chapters' tab on the main menu, and you automatically land on the 'Welcome' page, then you are already logged in

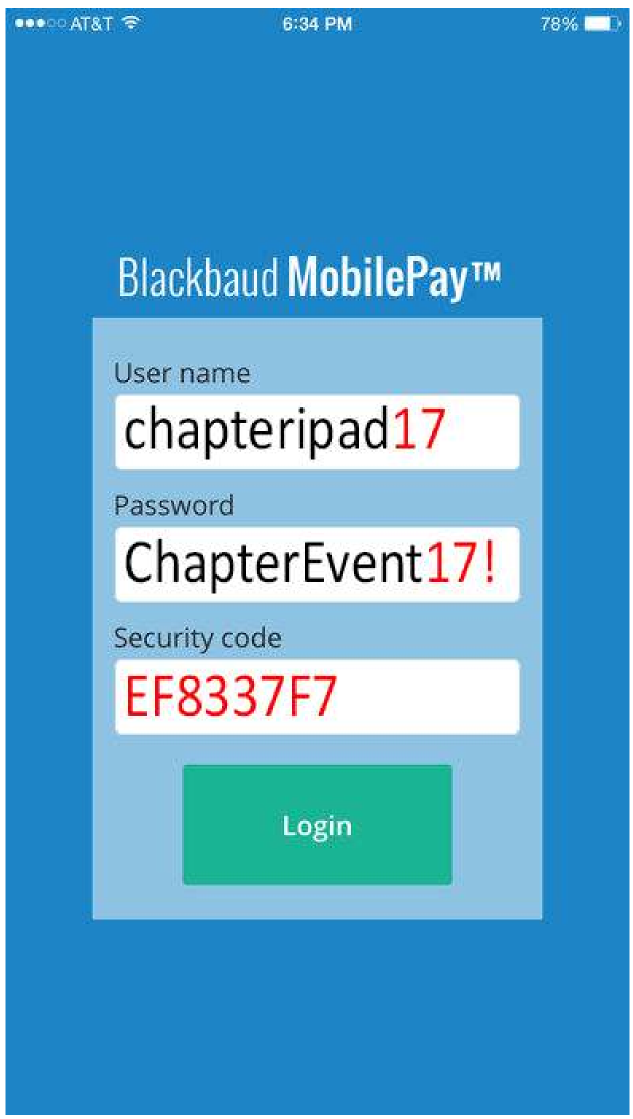


Accessing the 'Officers Only' Page if Already Logged In

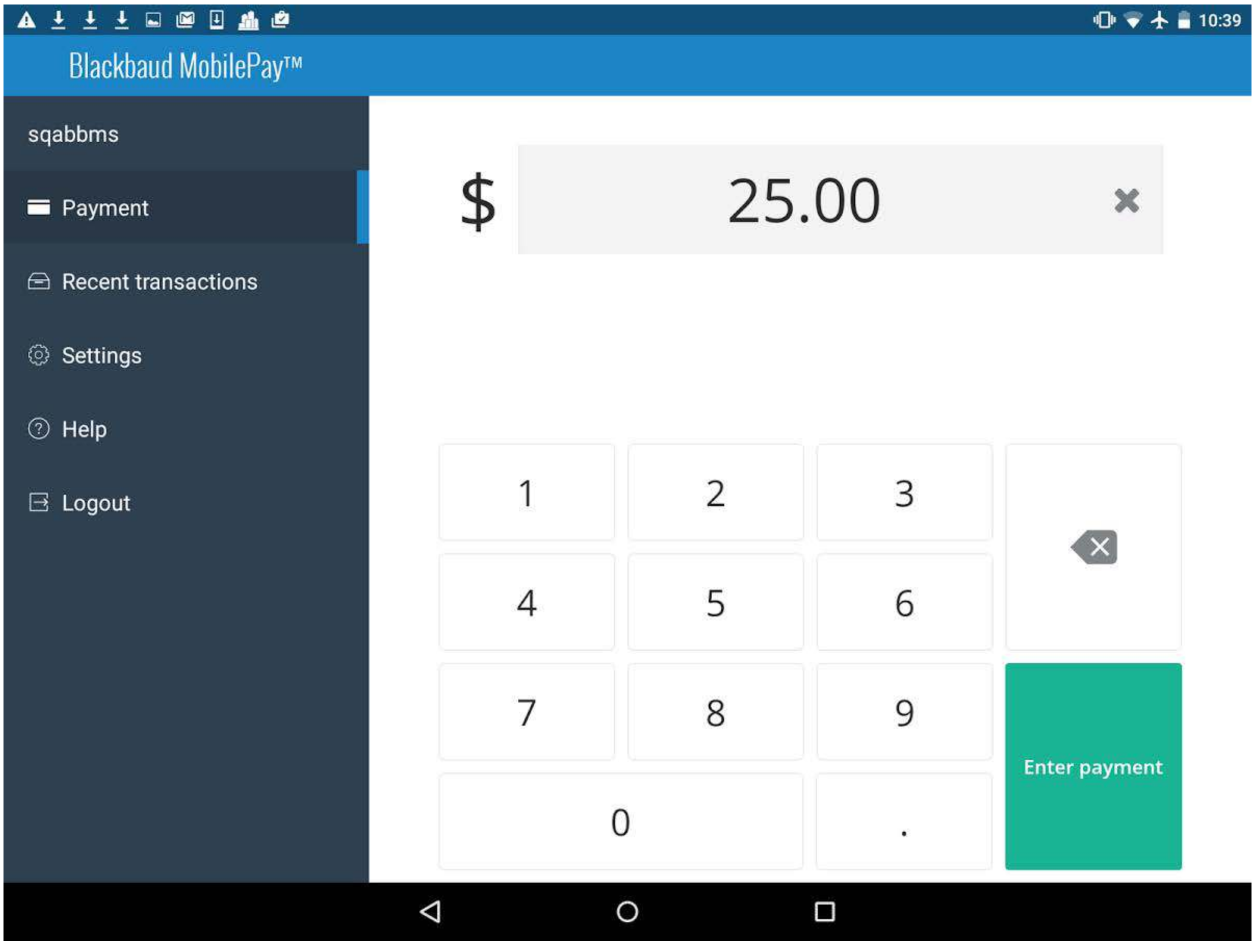
If you visit our site and find that you are already logged in, simply click on the 'Officers Only' tab on the main menu to access the 'Forms' page, where you will find all of the Deposit, Membership forms, etc.

How to Use the Blackbaud Mobile Pay APP to Accept Credit Card Payments (iPad)

1. Enter the login information provided with your iPad
    - The numbers in red will vary and are unique to each iPad. They will be provided in the written instructions when the iPad is picked up.
    - The password letters “C” and “E” should be capitalized
    - The security code that is saved in the iPad when you receive it should ***always*** be correct and you should not change it despite the message that pops up saying “the username, password, or security code is incorrect” The written instructions we provide with each iPad will include the security code in case it is changed by accident.

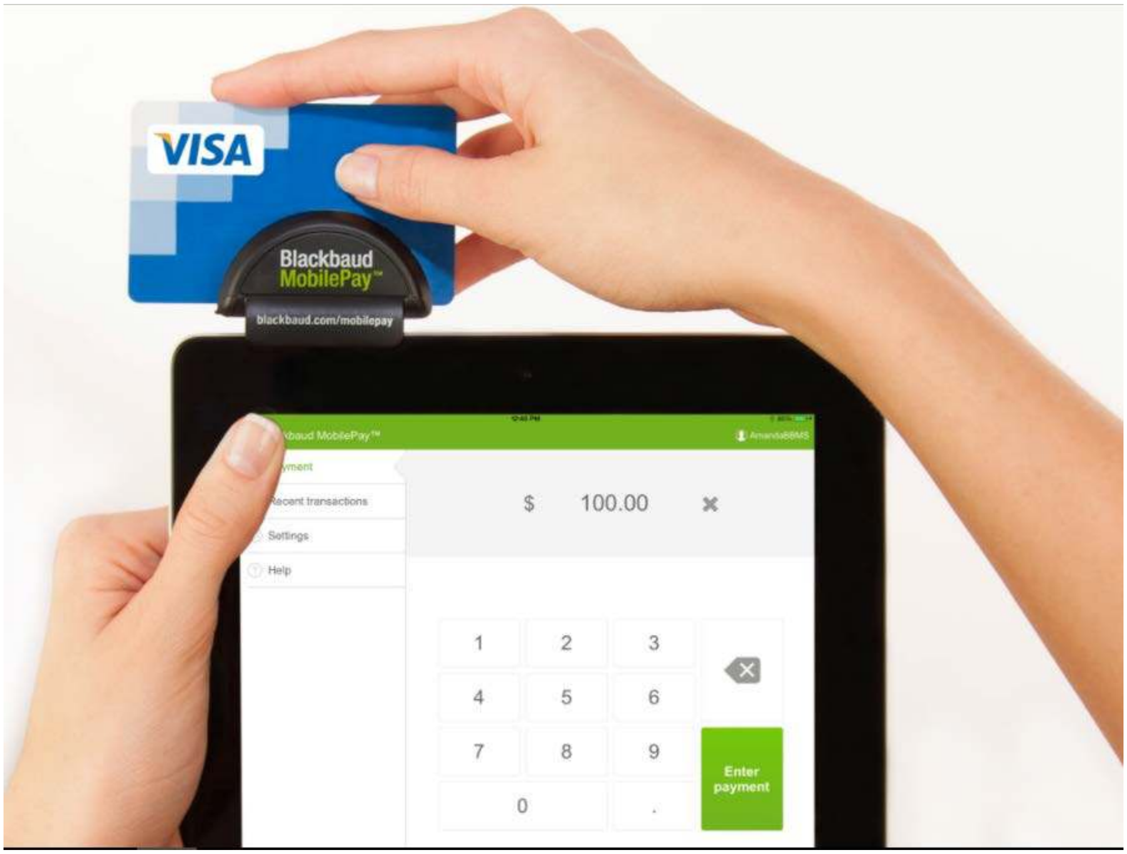


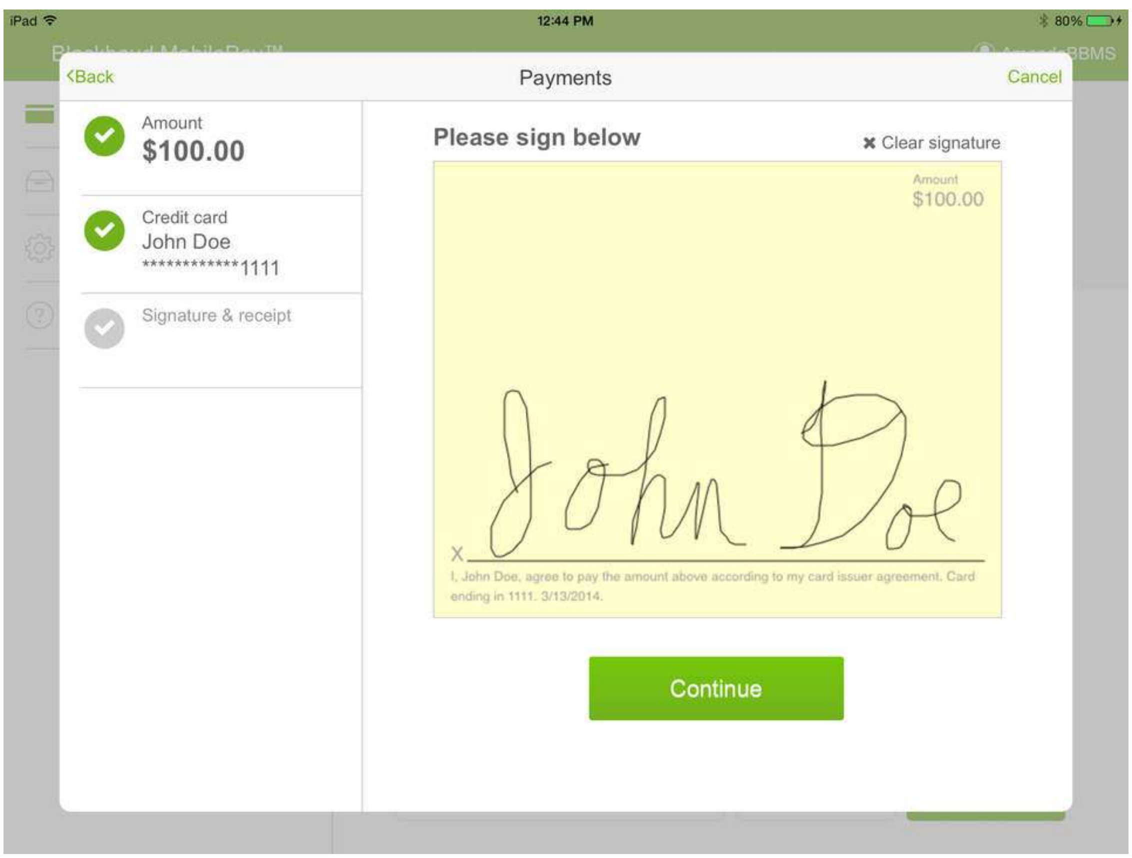
2. Choose 'Setting Options" by clicking the '3 bars' icon on the top left
3. In the DEFAULT COMMENTS section, confirm that your event code is correct
    - The event code is used to identify your credit card transactions with your chapter and your event.
4. Enter the amount to be charged to the credit card (use decimal points)



5. Hit the green "ENTER PAYMENT" button at the bottom right of screen
6. Swipe card when prompted (Magnetic strip of card should be facing the person holding iPad)
7. Have the person sign in the yellow box. Return card to the person.
8. Hit the green "CONTINUE" button under signature box.
9. If person wants a receipt, it will have to be emailed. Enter email address.
10. Hit the green "PAY NOW" button.
    - Email address must be entered before hitting the "PAY NOW" button. This is the only chance to send receipt to person.
11. Wait for confirmation.

You may watch this video for more step by step instructions:
https://www.youtube.com/watch?v=PX_MDhAJlwM


VISA
Blackbaud
MobilePay™
blackbaud.com/mobilepay
Recent transactions
Settings
Help
$ 100.00
1
2
3
4
5
6
7
8
9
0
.
Enter payment


iPad
12:44 PM
80%
Back
Payments
Cancel
Amount
$100.00
Credit card
John Doe
*************1111
Signature & receipt
Please sign below
Clear signature
Amount
$100.00
X
I, John Doe, agree to pay the amount above according to my card issuer agreement. Card ending in 1111. 3/13/2014.
Continue