



Corporate Giving Standard: User Guide to Online Services

Learn How To:

- Log In
- Enter Survey Data
- Submit Completed Survey
- Run & Print Reports

Log In

1. Go to www.CorporatePhilanthropy.org
2. Click the green “My CECP” link in the upper right corner
3. Enter your Username and Password (sent to you by CECP staff), and click on the word “Login”
4. Click the link “Access the Corporate Giving Standard (CGS)” in the center of the screen
5. You are now on the CGS homepage.

Enter Data

1. Click on the words “Enter Survey Data” located under the CECP logo. Survey questions are grouped into six sections that are listed horizontally across your screen. You may answer the survey questions in any order with the exception of Questions II.A through II.E, which must be answered sequentially. Question A is required.
2. Click on a section in the horizontal list.
3. Once in a section, click on a question from the tree structure list in the left-hand taskbar:
 - Click the “Answer Question” button and enter your response.
 - If you have a question, click the “Get Help” button for online guidance.
 - Click the “Save” button at the bottom of the question once you have entered data.
 - Click “Cancel” to leave the question without saving your entry.
4. To move to another survey question, click a question title in the list in left task bar.

Submit Completed Survey

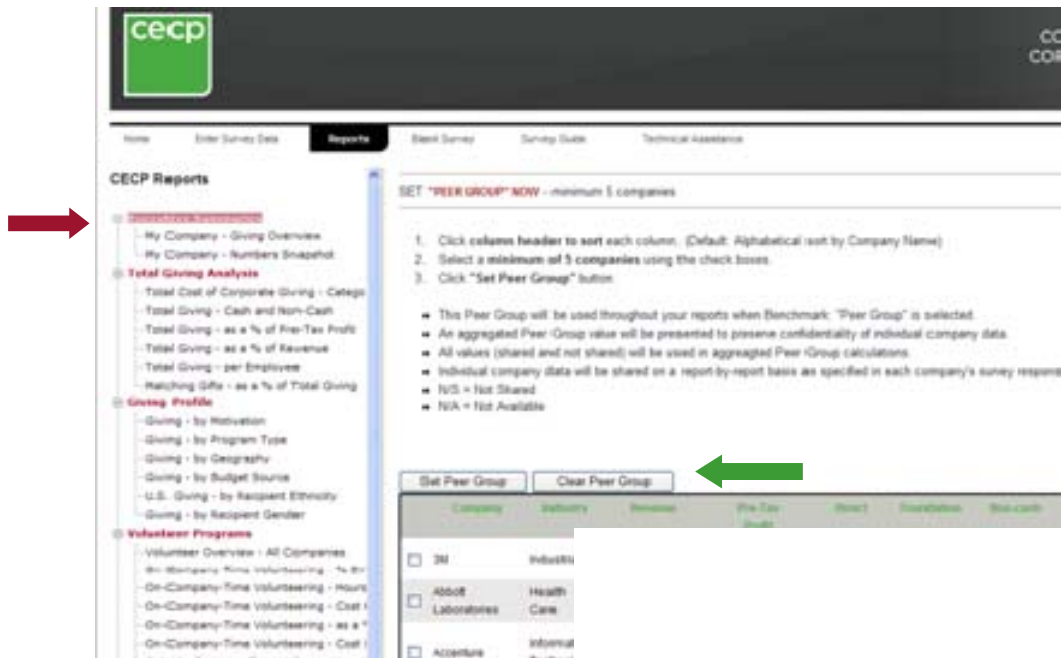
You may edit your answers until you submit your survey. When you are ready to finalize your survey:

1. Click “Full Survey – Review/Print/Submit” in the middle left side of the screen.
2. Once the screen loads, scroll to the bottom and click “Check Survey”. You will get a pop-up message inviting to review your data one final time before submission. Click “ok” to this message.
3. Scroll to the bottom of your survey again and click “Submit Survey.”
4. You will get an on-screen confirmation and an e-mail message that your survey has been submitted.
5. The on-screen confirmation includes the option to save a copy of your submission.
6. Should you later realize you need to change or add to your responses, contact a CECP staff member.



Run & Print Reports

Once signed in to the CGS online system, click on the Reports tab. After you click on this tab in the main horizontal task bar of the CGS, the report environment will appear. The **list of reports** appears along the left side of the screen. Report names are in grey. Report categories (which cannot be selected) are in red. The Peer Group selection area is in the main, center-right part of the screen.



You do not need to select a peer group to run reports and you do not need to put a check mark next to your company. Setting a Peer Group is covered at the end of this document.

Choosing a Report to Run

The following is a list of reports that CGS users run most frequently. You are welcome to choose any report in the list, but we suggest choosing one of these to get started:

Report Name

- My Company – Giving Overview
- My Company – Numbers Snapshot
- Total Giving – Cash and Non-Cash
- Total Giving – as a % of Pre-Tax Profit
- Total Giving – as a % of Revenue
- Giving – by Program Type

Report Category

- Executive Summaries
- Executive Summaries
- Total Giving Analyses
- Total Giving Analyses
- Total Giving Analyses
- Giving Profiles



Running & Printing Your First Report

1. **Click the report title** (for example: “My Company – Numbers Snapshot”). The “**report criteria**” page will load on the right side.
2. In the “report criteria” page, you will see a “dropdown box” specifying a selection choice. By clicking the downward arrow, you can determine what data the system will retrieve. Changing the contents of a dropdown box is optional

3. Click the “**View Report**” button and wait for the report to appear (if your company did not submit data for the year in question, some parts of the reports will be blank—which is fine).
4. **Print** the report using your Internet browser’s print button—the same way you would print any other Web page. If you have difficulty printing a report, you may change the “**Report Format**” to Microsoft Word, Microsoft Excel, or Adobe PDF.

Different Types of Dropdown Boxes

Selecting a Benchmark

- *My Company.* Select this to see data for your company.
- *All Companies.* This aggregates data from all submitted surveys.
- *Classification – Manufacturing / Service.* Every company falls into only one of these two categories (a company either makes a product or provides a service).
- *Industry.* There are 10 industries. However, only 9 are currently shown. At least five companies must be in an industry in order for that industry to appear in the list. As the “Telecommunications Services” industry has fewer than five companies submitting data, it is not shown. That industry will be automatically added to the list when five companies in the industry have completed surveys.
- *Peer Group.* This is the group you created in the Peer Group selection process.
- *Company – [Company Name].* Companies that are “willing to share” the data needed to run this report will be shown. Selecting a company by name will display their exact numbers in the resulting report.

Selecting the Year

- *2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, or 2010.*

Selecting the Type of Giving

- *Total Giving, Direct Cash Only, Foundation Cash Only, Total Cash, Non-Cash Only.*

Selecting the Foundation Structure

- *With Foundation.* Show values for companies that have a foundation.
- *Without Foundation.* Show values for companies that do NOT have a foundation.

Selecting the Report Format

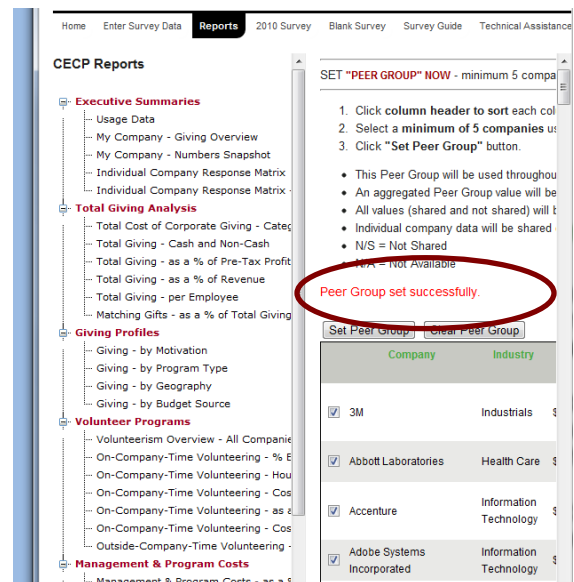
- *HTML*. Data shows in a Web page (most commonly used format).
- *PDF*. Best choice for saving and printing reports.
- *Word*. Allows you to work with reports in Microsoft Word.
- *Excel*. Allows you to work with reports in Microsoft Excel.

Enhanced Reports: Choosing a Peer Group

The Peer Group functionality allows you to select a group of relevant companies for benchmarking. To go to the Peer Group selection screen, click “Reports” in the top navigation bar (under the CECP logo). Selecting a peer group is optional.

Setting your Peer Group

1. If you want to include a company in your peer group, **click the checkbox** next to that company’s name. You may choose as many companies as you like, but your peer group must contain at least 5 companies.
2. Once you have a checkmark next to at least 5 companies, **press the “Set Peer Group” button**, found at the top and bottom of the company list. Simply checking the boxes will **NOT** save your peer group.



Tips for working with Peer Groups

- **Sort list by column headings.** Column headings (i.e. revenue, total giving, industry, etc.) may be sorted. Clicking the column heading once sorts the list, clicking it again sorts it in the reverse order. If you sort multiple times, you will lose your previous checkmarks.
- **Change your peer group as often as you like.** To do so, click “Reports” in the top navigation bar and you will be taken to the Peer Group selection screen.
- **“N/S” = “Not Shared.”** This means that the company answered the question, but was not willing to show their company’s individual response. You may still choose a company showing an “N/S” for your peer group. Although that company’s exact answers are hidden from you, their data will be factored in to all graphs, reports, and calculations.
- **“N/A” = “Not Available.”** This indicates that the company shown did not provide data for that question. You may still choose a company showing an “N/A” for your peer group.
- **Use peer groups to “include” OR “exclude” companies.** You can put a checkmark next to the companies that interest you – or you may put checkmarks next to all companies *except* those against which you do NOT want to compare yourself.

Customized Reports

The online CGS reports offer extensive options for your benchmarking needs. If you have any questions using the system, do not hesitate to contact a CECP staff member. We are also here to assist if you need additional analysis which cannot be completed online; simply give us a call or email to discuss further.