The Mount Holyoke Fund Volunteer Website is a terrific resource for all of your classmates’ giving and contact information. These reports are refreshed on a nightly basis. This document will provide you step by step instructions on how to navigate the valuable tools and reports located on the website. Below is the link to access the Mount Holyoke Fund Website.

Volunteer Website Landing Page: mtholyoke.edu/go/mhfvolunteer
If you do not know your User ID or password, or need help logging in, please contact Theresa O’Banner: tobanner@mtholyoke.edu / (800) 642-4483 Suggested Browsers: Chrome and Firefox

Here you will find a Log In button for the Volunteer Reports, overall Mount Holyoke Fund totals (dollars and donors) to date, as well as access to helpful resources such as:

- Volunteer Position Descriptions
- Outreach Resources
- Giving Programs
- Glossary of Terms under other Volunteer Resources
- Staff Assignments by Class

You also have links to the Alumnae Association on the lower left side bar.
To get to your Volunteer Reports, click on Reports Log In under Volunteer Reports in the Green box on the upper right-hand side.

Now you are on the login page:

Click the Log In link and type your User ID (mh####) and password.

Now you are at the Main Menu:

Under the Mount Holyoke Fund Volunteer gray bar you will see three reports that you can use to access donor information. Please keep in mind that the information contained in these reports is confidential and is intended for use solely by the volunteer logging in. This information should not be shared with anyone, nor should this information be used for commercial, political, or private fund-raising purposes. All saved files of reports should be deleted once they are no longer needed. If the information is printed out, the output should be shredded after use.

On the right hand side, you will find more useful reports including a list of Alumnae Marked as Lost (meaning the College has no accurate contact information).
SELECT YOUR REPORTS

- **MHN Progress Report**: Provides contact and giving information for all of your assigned classmates in spreadsheet form.
  
  - At the top of the page, you will see a shaded bar with information on your class goals and your progress to date. You can also find this information in the *MHN Class Totals and Comparisons* report as well.

  - Below this, you will see an option to receive email updates when a classmate makes a gift. By checking this box you will receive an email letting you know when a classmate has made a gift. For pledges and recurring gifts, you will receive an email after the initial setup. You will not receive notifications for subsequent pledge payments.
  
  - Below this is a section with five filters: Last Gift Dates, Ask Amounts, 2016-17 Amounts, 2016-16 Amounts, Volunteer.

  - Using these filters, you can search by the date range, ask amount, this fiscal year’s giving amount or last year’s gift amount. When a filter is on, the report below will show only those classmates who fit the given criteria. The X clears the filter. For HCA’s the Volunteer filter will allow you to look at classmates assigned to a particular volunteer.

  - Below this, you will see another section with the heading Show/Hide Columns Click on any of the boxes and the selected information will appear in the report below. This is where you can customize your report to reflect that data you are most interested in.
- Sort each column of the report by clicking on the column heading.
- Click the green plus sign next to each name for more detailed giving information for the current fiscal year.

- Above the report, on the left-hand side, you will see three buttons for Print, PDF, and Excel.

- Search Feature offers you more flexibility when needing to find someone quickly. This is located at the right of the tool bar. Search anyone’s name and they will appear below in your list. Search “Agent” to pull up a list of class agents or “LYBUNT” to pull up a list of LYBUNts (gave Last Year But Unfortunately Not yet This year).

- Each classmate’s name is a live hyperlink. Click on her name to view her **MHF Individual Profile**.
- Click on **Main Menu** in the bar at the top right of your screen to return to the main volunteer reports page.

**MHF Individual Profiles**: Provides an individual profile with more in-depth information for each of your assigned classmates.

- Click on the arrow at the top right corner of the first Individual Profile to move to the next Profile. Use the arrows to navigate back and forth.
• **MHF Class Totals and Comparisons**: Contains a list of all classes with their FY17 dollars raised and participation goals and progress to date.

- Scroll up and down to find stats for your class.
- Above the report on the left-hand side, you will see three buttons for Print, PDF, and Excel.
- Sort the report by clicking on the top of any column heading.
- Use the Search feature to find just your class.
- Click on Main Menu in the bar at the top right of your screen to return to the main volunteer reports page.

**NEW TO THE VOLUNTEER WEB REPORTS**
• **Sustaining Donor:**
  With the introduction of our Sustaining Donor Program, you now have an option to view a column that indicates if a classmate is currently a sustaining donor. If a donor has signed up to make sustaining monthly gifts, they will show up as a “Y.” You also will be able to see if a classmate is a sustaining donor by hovering your mouse over the MHF 16-17 column. If the donor has signed up to make sustaining gifts “(Sustaining)” will follow their gift information.

- **Laurel Chain Society Information:**
  You now have an option to view a column that shows if a classmate is currently a member of the Laurel Chain Society. If the donor made a gift that qualifies them for the LCS, they will show up as a “Yes.” If a gift this year will make a donor a member of the LCS, they will show up as “Potential.” Alumnae who have made a gift to the College for 50 years or more are indicated in the Laurel Chain Society column as “Lifetime.”

**EXCEL EXPORT TIPS AND TRICKS:**

- Click on the excel export icon

- Best Practice is to rename your file and attach a date to the end of the name.

- File may not automatically open, so be sure to look for it in your saved folder.

- Resize columns for better viewing by selecting all columns by clicking and dragging the mouse until all columns are blue and double clicking in between Column A and Column B when the cursor becomes a cross with a double arrow.

- Highlight the column headers again and click the Data Tab and the Filter Icon. You can also highlight a column and sort using the Sort Icon.

- Auto sum: Click in any blank cell. Click the arrow next to the Sum Icon and select Sum. A formula will pop up in the cell and in the formula bar above spreadsheet. Select your range by clicking the cells you want to add and dragging until all cells are selected or type in the beginning cell (C2) then a semi colon (:) then the end cell of the range (C84). Hit Enter and excel will add them up for you.
• Freeze Top Row for viewing: Click on the View Tab and click the arrow next to Freeze Panes. Select Freeze Top Row and your top row of data will always be in view as you scroll down your spreadsheet.

• Ctrl Z: If you accidentally type in a cell and change the data. Hold down the CTRL button and Z to undo your action.
• Ctrl Y: You wanted to change that cell anyway, hold down Ctrl button and Y to redo.
• Ctrl Home: Need to get to the top of your spreadsheet fast? Hold down Ctrl and press the Home Key to return to cell A1
• Delete a column: Highlight that column, when it is blue Right click on your mouse and select Delete.