Point in Time – Agency Overview

CFCNCA
1. Access Point in Time - Agency Overview Tool

After logging into Nexus, hover the mouse over “MY TOOLS” in the account toolbar. View a dropdown menu. Within that menu, select the third option: point in time - agency overview
# View page for Point in Time – Agency Overview

At the top of the page are the Displayed Report Year and End Date fields, which are used to activate the Point in Time aspect of this report. In the middle of the page are tables of data, which provide the Agency Overview aspect of this report. At the bottom of the page are buttons that allow you to download the displayed data as a comma-separated values file (CSV).

## AGENCY OVERVIEW

### DISPLAYED REPORT YEAR: 2016

<table>
<thead>
<tr>
<th>Agency Group/Agency (click for details)</th>
<th>Pledges</th>
<th>Dollars</th>
<th>Avg.</th>
<th>#</th>
<th>Part. %</th>
<th>Per Cap.</th>
<th>Dollar</th>
<th>Dollar %</th>
<th>Pledges</th>
<th>Pledges %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Homeland Security</td>
<td>244</td>
<td>$138,231.00</td>
<td>$566.52</td>
<td>28,905</td>
<td>0.8%</td>
<td>$4.78</td>
<td>$4,772,000.00</td>
<td>2.9%</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2016 CAMPAIGN TOTALS</th>
<th>Pledges</th>
<th>Dollars</th>
<th>Avg.</th>
<th>#</th>
<th>Part. %</th>
<th>Per Cap.</th>
<th>Dollar</th>
<th>Dollar %</th>
<th>Pledges</th>
<th>Pledges %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>377</td>
<td>$258,177.62</td>
<td>$711.35</td>
<td>369,470</td>
<td>0.1%</td>
<td>$0.73</td>
<td>$51,359,960.00</td>
<td>0.5%</td>
<td>0</td>
<td>--</td>
</tr>
</tbody>
</table>

This report generated in 0.116 seconds.

Click the link to download the latest Agency Overview report.

- [Prereconciled download](#)
- [Download without prereconciled pledges](#)
3. Features that Control Your View of the Data

- Green plus shows information
- Red minus hides information
- Clicking agency or unit names to show/hide pledge details
4. Layout of Group/Agency data table

A. The names of any agencies to which you have access will appear in the leftmost column of the Group/Agency table once pledging begins. Data is organized by department or agency, with information in groups of columns as follows:

B. **General performance data**: number of pledges, dollar amount raised, average pledge amount

C. **Employee data**: number of fulltime employees (FTEs), percentage of employees participating, agency’s per capita gift amount

D. **Goals**: value of dollar goal and percentage of goal that’s been attained. A goal may not be set for number of pledges.
5. Layout of Campaign Totals data table

A. Aggregate data for all CFCNCA agencies is displayed in the Campaign Totals data table beneath the Group/Agency data table, with information in groups of columns as follows

B. General performance data: number of pledges, dollar amount raised, average pledge amount

C. Employee data: number of fulltime employees (FTEs), percentage of employees participating, CFCNCA’s per capita gift amount

D. Goals: value of dollar goal and percentage of goal that’s been attained. A goal may not be set for number of pledges.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledges</td>
<td>Dollars</td>
</tr>
<tr>
<td>377</td>
<td>$268,177.62</td>
</tr>
<tr>
<td>Avg.</td>
<td>$711.35</td>
</tr>
<tr>
<td>#</td>
<td>Part. %</td>
</tr>
<tr>
<td>369,470</td>
<td>0.1%</td>
</tr>
<tr>
<td>0.5%</td>
<td>0</td>
</tr>
</tbody>
</table>
6. Viewing pledge details

A. Click on the name of an agency to view pledge details, which breaks down pledge activity by pledge type. There are four groups of pledge types; they are listed beneath the name of the selected agency with the number of pledges, amount of dollars, and average amount contributed per pledge type.

B. Nexus Pledge: credit, debit, and ach transactions, plus any payroll pledges completed in Nexus

C. Paper Pledge: includes all paper pledge types, including payroll, check, and cash pledges

D. Event Pledge: any funds collected and recorded at agency special events with the Form 150

E. myPay or EEX pledges: any payroll pledges collected through either the myPay or EEX system

F. Pledge details are also available for groups within an agency and individual reporting units within an agency. Click on the name of any agency, group, sub-group, or reporting unit to view pledge details. Examples of these views are displayed later on in this tutorial.
7. Viewing agency groups

A. Clicking the plus sign next to an agency name reveals groups within the agency.

B. Many agencies will contain only a single level of groups.

C. Occasionally, very large agencies will contain multiple levels of agency groups. Groups present within a group are called sub-groups.

D. General performance, employee, and goals data is displayed for each group.

E. Click all the available green plus signs to reveal all levels of agency groups, and then all reporting units within a group; note that, once selected, the green plus sign becomes a red minus sign. Clicking the red minus signs will hide the reporting units and groups from view.
8. Viewing pledge details for agency groups

A. Click the name of a group to reveal pledge details by pledge type

B. Pledge details are also available for sub-groups within a group, as well as individual reporting units
8. Viewing reporting units

A. Selecting all green plus signs reveals reporting units

B. General performance, employee, and goals data is displayed for each reporting unit

<table>
<thead>
<tr>
<th>Group / Agency (click for details)</th>
<th>Pledges</th>
<th>Dollars</th>
<th>Avg.</th>
<th>#</th>
<th>Part. %</th>
<th>Per Cap.</th>
<th>Dollar</th>
<th>Dollar %</th>
<th>Pledges</th>
<th>Pledges %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Defense</td>
<td>5,187</td>
<td>$4,174,964.29</td>
<td>$804.89</td>
<td>81,124</td>
<td>6.4%</td>
<td>$51.46</td>
<td>$12,383,890.00</td>
<td>33.7%</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>DOD AIR FORCE</td>
<td>819</td>
<td>$571,158.53</td>
<td>$697.39</td>
<td>10,650</td>
<td>7.7%</td>
<td>$53.63</td>
<td>$1,750,000.00</td>
<td>32.6%</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>DOD AF HAF</td>
<td>327</td>
<td>$252,948.67</td>
<td>$773.54</td>
<td>2,854</td>
<td>11.5%</td>
<td>$88.63</td>
<td>$611,680.00</td>
<td>41.4%</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

- DOD AF HAF A1: 63 pledges, $44,259.07, $702.52, 402, 15.7%, $110.10, $75,000.00, 59.0%
- DOD AF HAF A10: 24 pledges, $25,254.00, $1,052.25, 105, 22.9%, $240.51, $19,500.00, 129.5%
- DOD AF HAF A2: 11 pledges, $8,166.00, $742.36, 320, 3.4%, $25.52, $53,500.00, 15.3%
- DOD AF HAF A3/5: 32 pledges, $16,966.00, $530.19, 572, 5.6%, $29.66, $115,000.00, 14.8%
- DOD AF HAF A4/7: 49 pledges, $40,092.36, $818.21, 333, 14.7%, $120.40, $79,900.00, 50.4%
- DOD AF HAF A8: 32 pledges, $25,323.00, $791.34, 148, 21.6%, $171.10, $45,000.00, 56.3%
- DOD AF HAF A9: 34 pledges, $31,379.00, $922.91, 171, 19.9%, $183.50, $41,000.00, 76.5%
- DOD AF HAF CC: 3 pledges, $4,020.00, $1,340.00, 14, 21.4%, $287.14, $2,900.00, 138.6%
- DOD AF HAF HC: 4 pledges, $1,440.00, $360.00, 10, 26.7%, $96.00, $2,900.00, 49.7%
- DOD AF HAF JA: 36 pledges, $16,120.00, $447.78, 295, 12.2%, $54.64, $70,000.00, 23.0%
- DOD AF HAF RE: 9 pledges, $12,806.00, $1,422.89, 92, 9.8%, $139.20, $19,500.00, 65.7%
- DOD AF HAF SE: 2 pledges, $1,250.00, $625.00, 12, 16.7%, $104.17, $3,000.00, 41.7%
- DOD AF HAF SG: 22 pledges, $20,841.24, $947.33, 312, 7.1%, $68.80, $89,800.00, 29.8%
- DOD AF HAF TE: 6 pledges, $5,032.00, $838.67, 30, 20.0%, $167.73, $9,900.00, 50.8%
9. Viewing reporting unit pledge details

Click the name of a reporting unit to reveal pledge details by pledge type

<table>
<thead>
<tr>
<th>Group / Agency (click for details)</th>
<th>Pledges</th>
<th>Dollars</th>
<th>Avg.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Defense</td>
<td>5,187</td>
<td>$4,174,964.29</td>
<td>$804.89</td>
</tr>
<tr>
<td>DOD AIR FORCE</td>
<td>819</td>
<td>$571,158.53</td>
<td>$697.39</td>
</tr>
<tr>
<td>DOD AF HAF</td>
<td>327</td>
<td>$252,948.67</td>
<td>$773.54</td>
</tr>
<tr>
<td>DOD AF HAF A1</td>
<td>63</td>
<td>$44,259.07</td>
<td>$702.52</td>
</tr>
</tbody>
</table>

### Nexus Pledge

| PAYROLL | 1 | $120.00 | $120.00 |

### Paper Pledge

| Pre-Reconciled | 3 | $195.57 | $65.19 |

### myPay Pledge

| PAYROLL | 59 | $43,943.50 | $744.81 |
10. Download a CSV report of agency overview

A. Select either of the blue buttons near the bottom of the screen to download a Comma Separated Values (CSV) file of the data table.

B. The top button (preconciled download) will show all data available for your agencies. The bottom button (download without prereconciled pledges) will exclude unaudited data from the CSV.

C. Save the CSV to your computer. You can use the Excel application to view the file.
11. Using Point in Time to view past cumulative data

A. Click the Displayed Report Year field, located to upper right of the data table, to view dropdown menu of years.

B. Select the desired year from the drop down menu: 2013, 2014, 2015, or 2016.

C. The data table will load cumulative data for all agencies in years 2013, 2014, or 2015. For 2016, only the agencies with pledge data that you can access will appear.
12. Using Point in Time to access past data, 2013 to 2016

A. Click the calendar icon to the right of the End Date field to reveal a calendar interface beneath the End Date field.

B. Click the arrows at the top of the calendar interface to reveal months. The left arrow moves the calendar back a month. The right arrow moves the calendar forward a month. Each month is display with its year.

C. Select a date in the displayed month. Be sure that the year in the calendar interface matches the year in the Displayed Report Year field.

D. Press the submit button to the right of the calendar icon to display the data that was available or attained on the selected date.
13. Viewing a specific date with Point in Time

A. Any pledge data that accumulated for all agencies by the selected date will appear in the Agency Group/Agency data table.

B. You may view the data table by clicking green plus, red minus signs, or agency/group/reporting unit names.

C. To return to a view of cumulative data for the displayed year, press the reset button to the right of the submit button, located near the End-Date field.
Questions or Concerns?

- Please view tutorials and FAQs at the link below
  - support.cfcnca.org

- Contact CFCNCA Customer Support
  - Email: support@cfcnca.org
  - Phone: 202-465-7230