



Ambassador Action Center Instructions

Using the Reporting and User Progress Pages

Note: Your ability to run reports in the Reporting and User Progress page depends on your role in the volunteer structure.

Step 1: Access the user progress page by clicking the “USER PROGRESS” button in the top right corner.

Search By:

State(s)

Select one or more states

ACT Team

Select one or more teams

User Type

Select one or more user types

Volunteer Name

Enter all or part of a volunteer's name

NAME	IMPACT YOUR LAWMAKERS	BUILD YOUR TEAM	GET MEDIA COVERAGE	CONNECT WITH PARTNERS	MONEY RAISED FOR ACS CAN
Ryann Mannan	30 points earned out of 140 required	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.
Justine Jessie Allen	30 points earned out of 140 required	20 points earned out of 90 required	10 points earned out of 30 required	No activities recorded yet.	No activities recorded yet.
Sarah Donnelly	30 points earned out of 140 required	No activities recorded yet.	No activities recorded yet.	10 points earned out of 30 required	No activities recorded yet.
Jeff Soukup	10 points earned out of 140 required	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.

Step 2: On this page are multiple search bars assisting in tracking the progress of volunteers. You will be able to measure the progress of specific volunteers and volunteer groups using these search bars.

Ambassador Action Center User Progress

Search By:

<p>State(s)</p> <input type="text"/> <p>Select one or more states</p>	<p>User Type</p> <input type="text"/> <p>Select one or more user types</p>	<p><input type="button" value="Search"/> <input type="button" value="Reset"/></p>
<p>ACT Team</p> <input type="text"/> <p>Select one or more teams</p>	<p>Volunteer Name</p> <input type="text"/> <p>Enter all or part of a volunteer's name</p>	

Step 3: Click on the bar under the title "State(s)". A row of states will appear after you have clicked. Scroll through the list of states and click on the state you desire.

Search By:

<p>State(s)</p> <div><p>Maryland</p><p>Massachusetts</p><p>Michigan</p><p>Minnesota</p><p>Mississippi</p><p>Missouri</p><p>Montana</p></div>	<table border="1"><thead><tr><th>NAME</th><th>IMPACT</th></tr></thead><tbody></tbody></table>	NAME	IMPACT
NAME	IMPACT		

Step 4: Staff may add more than one state. If you want to delete a selected state, click on the gray X to the left of the state name.

State(s)

Select one or more states

Step 5: The ACT Team bar allows you to review the progress of specific state districts. Click on the bar under “ACT Team”. Scroll through the list of districts and click on one or more districts you’d like to see.

Search By:

State(s)

Select one or more states

ACT Team

- Massachusetts 1st
- Massachusetts 2nd
- Massachusetts 3rd
- Massachusetts 5th
- Massachusetts 6th
- Massachusetts 7th
- Massachusetts 8th

Search

Step 6: The User Type filter allows you to track the specific type of volunteer.

<p>State(s)</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× Massachusetts▼</div> <p>Select one or more states</p> <p>ACT Team</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× Massachusetts 4th▼</div> <p>Select one or more teams</p>	<p>User Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">▼</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"><p>State Lead Ambassadors</p><p>ACT! Leads</p><p>Legislative Team Ambassadors</p></div> <p>Enter all or part of a volunteer's name</p>
--	---

Step 7: Type in a name if you'd like to track a specific volunteer's progress.

<p>State(s)</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× Massachusetts▼</div> <p>Select one or more states</p> <p>ACT Team</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× Massachusetts 4th▼</div> <p>Select one or more teams</p>	<p>User Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× State Lead Ambassadors▼</div> <p>Select one or more user types</p> <p>Volunteer Name</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">ex. Joe Smith</div> <p>Enter all or part of a volunteer's name</p>
--	--

Step 8: If you'd like to broaden your search and track the progress of an entire state, only complete the state box.

<p>State(s)</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">× Massachusetts▼</div> <p>Select one or more states</p> <p>ACT Team</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">▼</div> <p>Select one or more teams</p>	<p>User Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">▼</div> <p>Select one or more user types</p> <p>Volunteer Name</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"></div> <p>Enter all or part of a volunteer's name</p>
---	---

Step 9: After you've completed the search bars to your liking, click the blue "Search" button to the right. If you'd like to star over the search process, click the white "Reset" button to clear the search bars.

State(s)

x Massachusetts
▼

Select one or more states

ACT Team

Select one or more teams

User Type

Select one or more user types

Volunteer Name

Enter all or part of a volunteer's name

Search

Reset

Step 10: Once you click search, all the results will appear on the bottom half of the screen. The information provides the name of the volunteer and the number of points they've earned within each of the categories.

Ambassador Action Center User Progress

Search By:

State(s)

x Massachusetts
▼

Select one or more states

ACT Team

Select one or more teams

User Type

Select one or more user types

Volunteer Name

Enter all or part of a volunteer's name

Search

Reset

NAME	IMPACT YOUR LAWMAKERS	BUILD YOUR TEAM	GET MEDIA COVERAGE	CONNECT WITH PARTNERS	MONEY RAISED FOR ACS CAN
Ryann Mannan	30 points earned out of 140 required	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.
Justine Jessie Allen	30 points earned out of 140 required	20 points earned out of 90 required	10 points earned out of 30 required	No activities recorded yet.	No activities recorded yet.
Brock Cordeiro	90 points earned out of 140 required	No activities recorded yet.	40 points earned out of 30 required	No activities recorded yet.	No activities recorded yet.
Deborah J Cornwall	420 points earned out of 140 required	80 points earned out of 90 required	70 points earned out of 30 required	60 points earned out of 30 required	No activities recorded yet.
Carol Clark	20 points earned out of 140 required	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.
Estelle Boucher	260 points earned out of 140 required	10 points earned out of 90 required	70 points earned out of 30 required	110 points earned out of 30 required	No activities recorded yet.
Jo-Ann Channell	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	No activities recorded yet.	30 points earned out of 40 required

Step 11: Click on the “REPORTING” button on the top right to run a report.

The screenshot shows the top navigation bar of the Cancer Action Network website. On the left is the logo for the Cancer Action Network, which includes the American Cancer Society logo. On the right, there is a user profile for 'MELISSA STACY' with a 'SIGN OUT' link, social media icons for Facebook and Twitter, and a red 'DONATE +' button. Below the navigation bar is a dark blue header with the text 'Ambassador Action Center Report Builder'. The main content area contains a search form with several sections: 'Date Between' with 'Start Date' and 'End Date' input fields (example: 07/13/2017) and a note to click for a calendar; 'State(s)' and 'District/ACT Team' dropdown menus (note: select one or more); 'Activity Category' and 'User Role' dropdown menus (note: select categories, top level includes all children; note: select one or more user types); and a 'Volunteer Name' input field (note: enter all or part of a volunteer's name). At the bottom of the search form are 'Search' and 'Reset' buttons.

Select some search parameters and click search to see results.

Step 12: The Reporting page allows you to run and export a report to share it with others. There are more search bars to further specify a report.

Step 13: In the bars titled “Date Between”, you can narrow down a report to specific period of time.

Date Between

E.g., 07/13/2017

E.g., 07/13/2017

Click in the fields to bring up a calendar

Step 14: Click the bar under “Date Between” that says “Start Date”. A calendar will appear.

Step 15: To navigate between months, click on the arrows on the top left and right of the calendar or click on the bar where the month is labeled and decide a month from the list that appears. Click on the desired day on the calendar.

Ambassador Action Center Report Builder

Search By:

Date Between

Start Date

State(s)

or more states

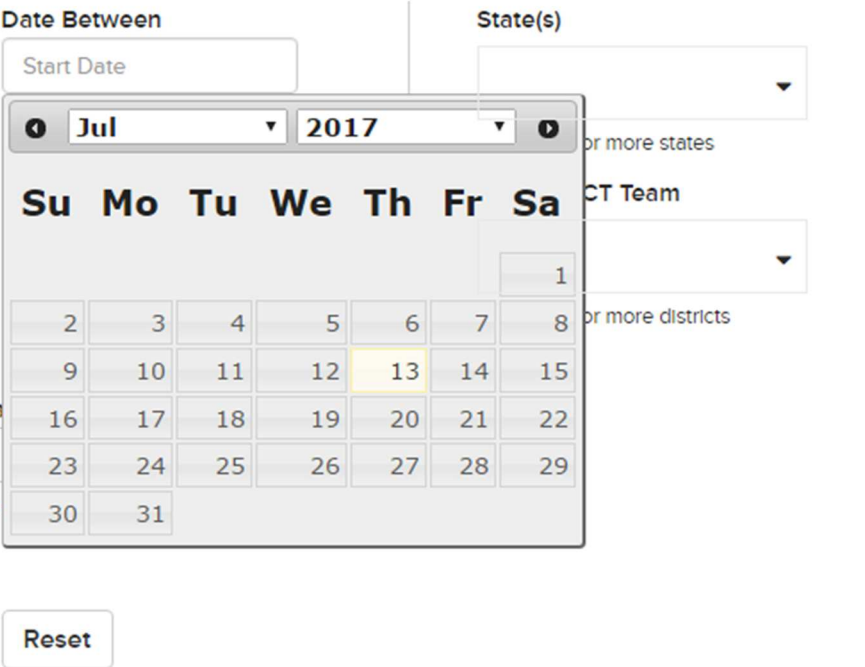
CT Team

or more districts

Volunteer Name

Enter all or part name

Search **Reset**



Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Step 16: Do the same process for the “End Date” bar.

Step 17: Click on the “State(s)” search bar and click your desired state from the list of states that appear.

Date Between

E.g., 07/13/2017

E.g., 07/13/2017

Click in the fields to bring up a calendar

r Name

part of a volunteer's

State(s)

- Massachusetts
- Maine
- Maryland
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana

Step 18: Click on the “District/ACT Team” search bar. Scroll through the list of districts. Click on the desired district.

State(s)

Select one or more states

District/ACT Team

- Massachusetts 1st
- Massachusetts 2nd
- Massachusetts 3rd
- Massachusetts 5th
- Massachusetts 6th
- Massachusetts 7th
- Massachusetts 8th

Na

part

Step 19: For the “Activity Category”, click the bar to select the activity you want to view.

Step 20: For the “User Role” section, specify the type of user you’d like to see in the report.

Activity Category

Select categories, note that selecting a top level category will automatically include all its children.

User Role

Select one or more user types

Step 21: Type in a volunteer’s name to view a report on them.

Volunteer Name

Enter all or part of a volunteer’s name

Search

Reset

Step 22: Click the blue “Search” button to confirm the information. Click the white “Reset” button to start over.

Step 23: The reports will appear at the bottom of the screen.

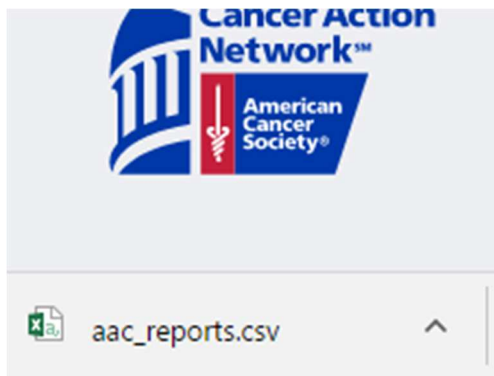
Step 24: Click the “Download CSV” button at the top left. A CSV is a spreadsheet system that will display the report in the program, Microsoft Excel.

Search Reset

Download CSV

POINTS	ACTIVITY DATE	NAME	ACTIVITY CATEGORY	ACTIVITY TYPE	USER STATE	ACT TEAM	WHO DID YOU CONTACT?	EVENT NAME	EVENT LOCAT
10	January 25, 2017	Estelle Boucher	Connect with Partners	Attend a Relay for Life team meeting or event representing ACS CAN	Massachusetts	Massachusetts 3rd		Gardner Relay Team Captain Meeting	Fitchbur MA
Total Points: 10	# of Actions: 1								

Step 25: The downloaded file will appear at the bottom of your screen. Click the file to open it.



Step 26: This file allows you to edit, sort, and share the report.

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

Points	Activity Name	Activity Type	User	State	District	Who did it	Lawmaker	People	yo Meeting	L Type of V	Volunteer	Volunteer Com
10	25-Jan-17	Estelle Bo	Connect v	Attend a F	Massachu	Massachusetts	3rd					

The spreadsheet is titled "aac_reports" and is open in the "Home" tab. A warning message is visible at the top: "POSSIBLE DATA LOSS: Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format." The spreadsheet has columns labeled A through C, and rows 1 through 27. The data is located in row 1, columns A through G.