

CHARITYLOG

ONLINE TRAINING COURSES

AUGUST – SEPT 2022

Charitylog – Extension Database Setup

This short course will go through how extension databases can be used.

This course is aimed at users with an understanding of how Charitylog operates. Attendees will also need to have full system administration rights.

The following topics will be covered:

- Understanding Extension Databases – includes what they are and when to use them.
- Adding to different record types
- Adding to referrals and contacts
- Using Extension Databases for Outcomes

Dates

Date	Time	Cost	Booking link
23/8/22	10.00am to 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-extension-database-set-up-tickets-381718328797
7/9/22	10.00am to 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-extension-database-set-up-tickets-381728067927

Charitylog – Fundraising

This short course will go through several key areas that can be used to record fundraising activity and is aimed at users with an understanding of system administration in Charitylog.

Attendees will need to have access to the relevant sections via Group Access.

The following topics will be covered:

- Creating and configuring a Funder record type
- Adding a project to record fundraising activity
- Adding stages to record the process
 - Apply for funding
 - Follow up application
 - Funding secured
 - Funding unsuccessful
 - Funding Received
 - Reports Due
- Extension database for application details
 - Date of application
 - Amount applied for
 - Requirement
 - Restricted/Unrestricted
 - Outcome
 - Amount Received
- Running Reports

Dates

Date	Time	Cost	Booking link
11/8/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-fundraising-activity-tickets-382817837457
13/9/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-fundraising-activity-tickets-382824928667

Charitylog – Extension Database Calculations

This short course will go through several key areas that can be used to create calculations based on the data recorded in an EDB.

This course is aimed at users with an understanding of Extension Database (EDB) setup in Charitylog.

Attendees will need to have access to the relevant sections via Group Access.

The following topics will be covered:

- What can I use EDB calculations for?
- Creating a calculation for BMI
 - Example: Weight = 68 kg, Height = 165 cm (1.65 m)
Calculation: $68 \div (1.65)^2 = 24$
 - Create the EDB
 - Excel calculation
 - Upload
 - Map fields to EDB
- UCL Loneliness scale example
 - Questions
 - Q1. How often do you feel that you lack companionship?
 - Q2. How often do you feel left out?
 - Q3. How often do you feel isolated from others?
 - Responses
Hardly Ever - 1
Some of the time – 2
Often - 3

Dates

Date	Time	Cost	Booking link
11/8/22	10.00am – 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-extension-database-calculations-tickets-381733153137
13/9/22	10.00am – 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-extension-database-calculations-tickets-381743243317

Charitylog - Excel Report Templates

This short course will go through several key areas that can be used to create pre prepared report templates for your regular requirements

It is aimed at users with an understanding of how Charitylog reporting operates.

Attendees will need to have access to the relevant sections via Group Access. They may also be responsible for writing monitoring reports or providing feedback to funders/commissioners.

The following topics will be covered:

- What is a report template?
- Creating a basic template (Selecting the only the fields needed)
 - Uploading to Charitylog
 - Running
- Creating a template to summarise data
 - Contents of Lookups (Validations)
 - countif function
 - Cell references
 - Charts
- Using countifs

Dates

Date	Time	Cost	Booking link
25/8/22	10.00am – 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-excel-report-templates-tickets-381746091837
8/9/22	10.00am – 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-excel-report-templates-tickets-381752831997

Charitylog - System Administration

This short course will go through several key areas that can be used to manage the key system administration tasks

It is aimed at users who are system administrators on Charitylog.

Attendees will need to have access to the relevant sections via Group Access.

The following topics will be covered:

- **Operational Rules & Terminology**
 - Org/person record rules
 - New referral/case rules
 - Security and password rules
 - Changing terminology
- **User access Management**
 - Creating a new user
 - Edit an existing user's access
 - Project access rights
 - Restricting access using 'see my own clients' function
 - Difference between user access and group access
- **Group access Management**
 - Areas covered within group access
 - Creating new security groups
 - Editing existing access within a group
- **Managing record types (e.g. client records)**
 - Adding/hiding fields from records
 - Moving fields to different sections on records
 - Creating new options to 'drop-down' fields
 - Creating new record types
 - Creating bespoke field(s) - introduction as this is covered in more depth in the extension database set up course

Dates

Date	Time	Cost	Booking link
25/8/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-system-administration-tickets-382778188867
8/9/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-system-administration-tickets-382813273807

Charitylog – Managing Staff and Volunteers

This short course will go through several key areas that can be used to manage staff/volunteers

It is aimed at users with an understanding of System Administration in Charitylog.

Attendees will need to have full access to the relevant sections via Group Access.

The following topics will be covered:

- Discussion on webforms.
- Recruitment project.
 - Setting up a project.
 - Setting up a workflow for application process.
 - Application received.
 - Informal chat.
 - Interview.
 - References and DBS application.
 - Recruit or reject.
 - Creating additional fields for key dates.
- Management project.
 - Setting up a project.
 - Setting up a workflow.
 - Induction.
 - Training reminders (Looping).
 - DBS check reminder (Looping).
- Groups and skills for job types.
- Courses and Qualifications.
- Reporting.
 - Groups and Skills.
 - Progress interval report.

Dates:

Date	Time	Cost	Booking link
16/8/22	10.00am – 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-managing-staff-and-volunteers-tickets-382826904577
6/9/22	10.00am- 12.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-managing-staff-and-volunteers-tickets-382833554467

Charitylog – Reporting

This short course will go through several key reports that can be used to provide insight into a wide range of monitoring requirements.

It is aimed at users with an understanding of how Charitylog operates.

Attendees will need to have access to the relevant reports via Group Access. These people may also be responsible for writing monitoring reports or providing feedback to funders/commissioners.

The following topics will be covered:

- KPI – run through of the steps in the KPI report and an overview of the KPI options.
- Progress Interval Report and Use of Templates/Stages
- Blue Folder and Data Extracts
- Analytics & Dashboard

Dates

Date	Time	Cost	Booking link
23/8/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-reporting-tickets-381753714637
7/9/22	2.00pm – 4.00pm	£45+VAT	https://www.eventbrite.co.uk/e/charitylog-reporting-tickets-381754787847

Charitylog – Beginners Excel skills

This short course will build Excel skills for those who can enter and edit data but have no knowledge of formulas. It is aimed at users with an understanding of system administration and reporting in Charitylog.

Attendees will need to have access to the relevant sections via Group Access.
The following topics will be covered:

Basic Formulas

Charts

IF statements

Analysing your data – sort and conditional formatting

Basic Formulas

- Using the AutoSum feature to automatically add values
- Understanding Formulas and their rules, BODMAS
- How to subtract, multiply and divide values in cells
- Calculating percentages
- Calculate with dates
- Using and Creating Absolute Formulas to enable a specific value to be used many times, i.e. VAT rate
- Finding Minimum, Maximum and Average values of a list of data
- Renaming sheets
- Inserting & Moving Sheets
- Copying & Moving sheets within current document or to new document

Charts

- Creating a chart
- Change the Chart Type
- Add different elements to a chart such as gridlines, legends etc.
- Format the Chart

IF statements

- Understanding Conditional Logic, i.e. IF statements
- Creating formulas using Basic Conditional Logic
- Creating formulas using Nested IF statements

Analysing your data

- Apply Conditional Formatting
- Sorting Data into Alphabetical or Numerical order

Dates

Date	Time	Cost	Booking link
16/8/22	2.00pm – 4.00pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-beginners-excel-skills-tickets-382837365867
6/9/22	2.00pm – 4.00pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-beginners-excel-skills-tickets-382841989697

Charitylog – Intermediate Excel Skills

This short course will build Excel skills for those who have some knowledge of basic formulas but would like to explore how Excel could help them further. It is aimed at users with an understanding of system administration and reporting in Charitylog.

Attendees will need to have access to the relevant sections via Group Access.

The following topics will be covered:

Charts

IF statements

Analysing your data – sort and conditional formatting

Introduction to Pivot Tables

Charts

- Creating a chart
- Change the Chart Type
- Add different elements to a chart such as gridlines, legends etc.
- Format the Chart

IF statements

- Understanding Conditional Logic, i.e. IF statements
- Creating formulas using Basic Conditional Logic
- Creating formulas using Nested IF statements
- Creating formulas using Nested AND & OR statements
- Using the =COUNTIF & COUNTIFS feature to count data meeting specified criteria
- Using the =SUMIF & SUMIFS feature to total data meeting specified criteria
- Using the =AVERAGEIF & AVERAGEIFS feature to find the average of data meeting specified criteria

Analysing your data

- Apply Conditional Formatting
- Sorting Data into Alphabetical or Numerical order

Pivot Tables and Pivot Charts

- Creating a Pivot Table
- Generating Sum, Average, Count etc. totals
- Grouping by Date
- Sorting Data
- Filtering Data in a Pivot Table

Dates

Date	Time	Cost	Booking link
17/8/22	10.00am - 12.30pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-intermediate-excel-skills-tickets-382852922397
15/9/22	10.00am - 12.30pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-intermediate-excel-skills-tickets-382868870097

Charitylog – Advanced Excel Skills

This short course will build Excel skills for those who already have a good understanding of Excel Formulas.

It is aimed at experienced system administrators and users with extensive knowledge of reporting in Charitylog.

Attendees will need to have access to the relevant sections via Group Access.

The following topics will be covered:

PivotTables, Pivot Charts & Slicers Lookup Tables

PivotTables, Pivot Charts & Slicers

- Creating a Pivot Table
- Generating Sum, Average, Count etc. totals
- Grouping by Date
- Sorting Data
- Filtering Data in a Pivot Table
- Changing the Layout of a Pivot Table
- Adding additional records to the Pivot table
- Use a Table Layout for your Pivot Table
- Refreshing a Pivot Table
- Automatically Updating PivotTables
- Working with Grand Totals & Subtotals
- Adding or removing Blank Rows from the display
- Applying formatting
- Hiding and Showing Detail
- Displaying Source Data for a Data Cell
- Creating Pages on Separate Worksheets
- Creating and formatting a Pivot Chart
- Add Slicers to provide easy filtering options for users

Lookup Tables

- Creation and use of VLOOKUP

Dates

Date	Time	Cost	Booking link
17/8/22	2.00pm - 4.30pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-advanced-excel-skills-tickets-382872089727
15/9/22	2.00pm - 4.30pm	£49+VAT	https://www.eventbrite.co.uk/e/charitylog-advanced-excel-skills-tickets-382877656377