Syracuse University

ywca

IS ON A MISSION

Training Manual

Contents

General Information

System Overview

The system has been designed to integrate the three major programs run by YWCA i.e. Women's Residence, Girls Inc, and STYA. The system aims to facilitating data entry, representation and visualization. The system also handles the donor information to project the information for each contributor in terms of contact, name, donations in each year and so on.
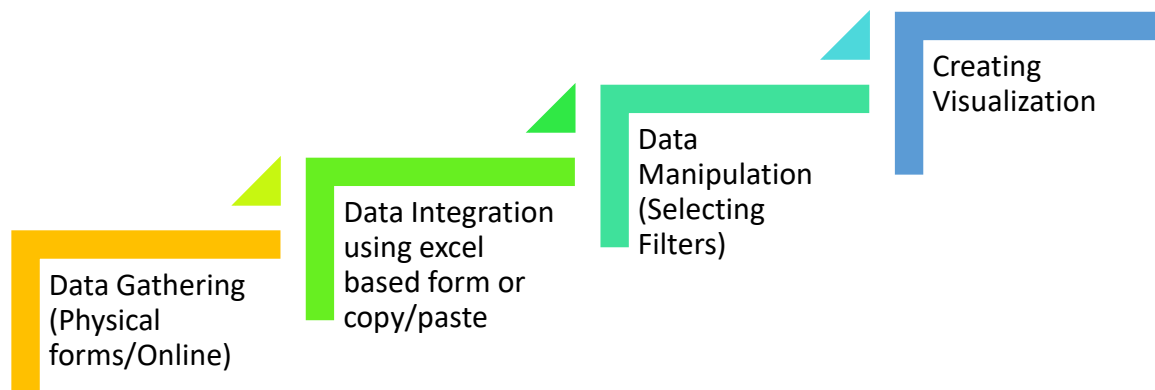
Authorized Use Permission

The authority lies in hand of YWCA after the submission of the project in terms of sharing, making use of visuals generated by the system, report generation and so on.

System Summary

System Overview

The system is developed solely on excel using macros and other functionalities defined in excel. The system is designed keeping in mind the usage feasibility and economical perspective.

Data Flow

Data Gathering (Physical forms/Online)

Data Integration using excel based form or copy/paste

Data Manipulation (Selecting Filters)

Creating Visualization

User Access Level

Every user has not been granted complete access to the system. There are some functionalities that are password protected. It is on YWCA's discretion whether to allow access to these functionalities or not. The password has been provided to YWCA for manipulating these processes.

Contingency and Alternate modes of Operation

We recommend users to continuously save work on the fly. We also recommend saving in different versions for better accessibility. Backing up files in different version will help user to understand the cause (if any) of the system failure and avoid accidents in the future. It is also recommended

to save the file on a cloud server (Google Drive/Dropbox) to keep a copy intact in case of an emergency or system malfunction.

Getting Started
Getting Started
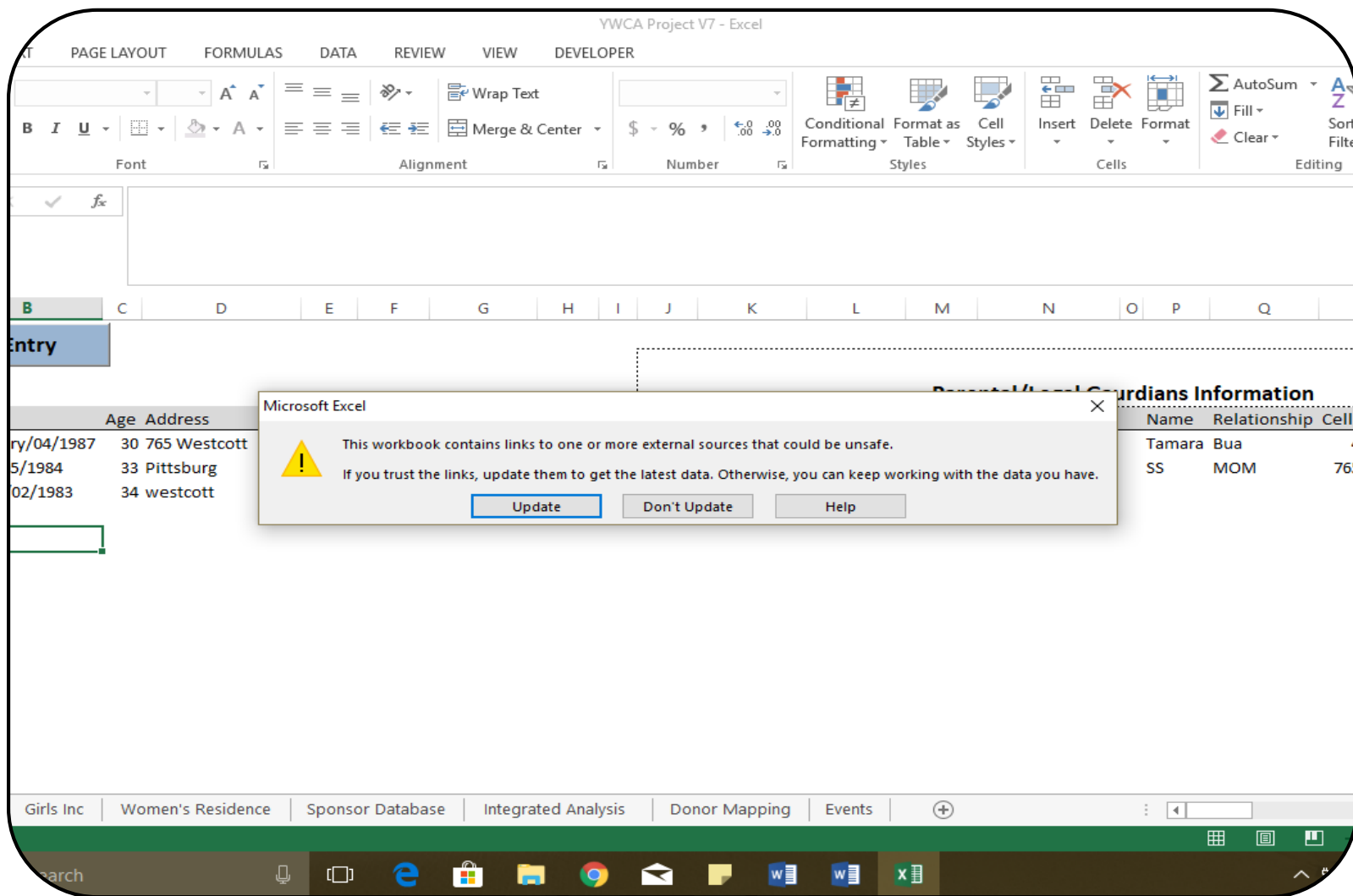

Figure 1: Open the Excel Workbook

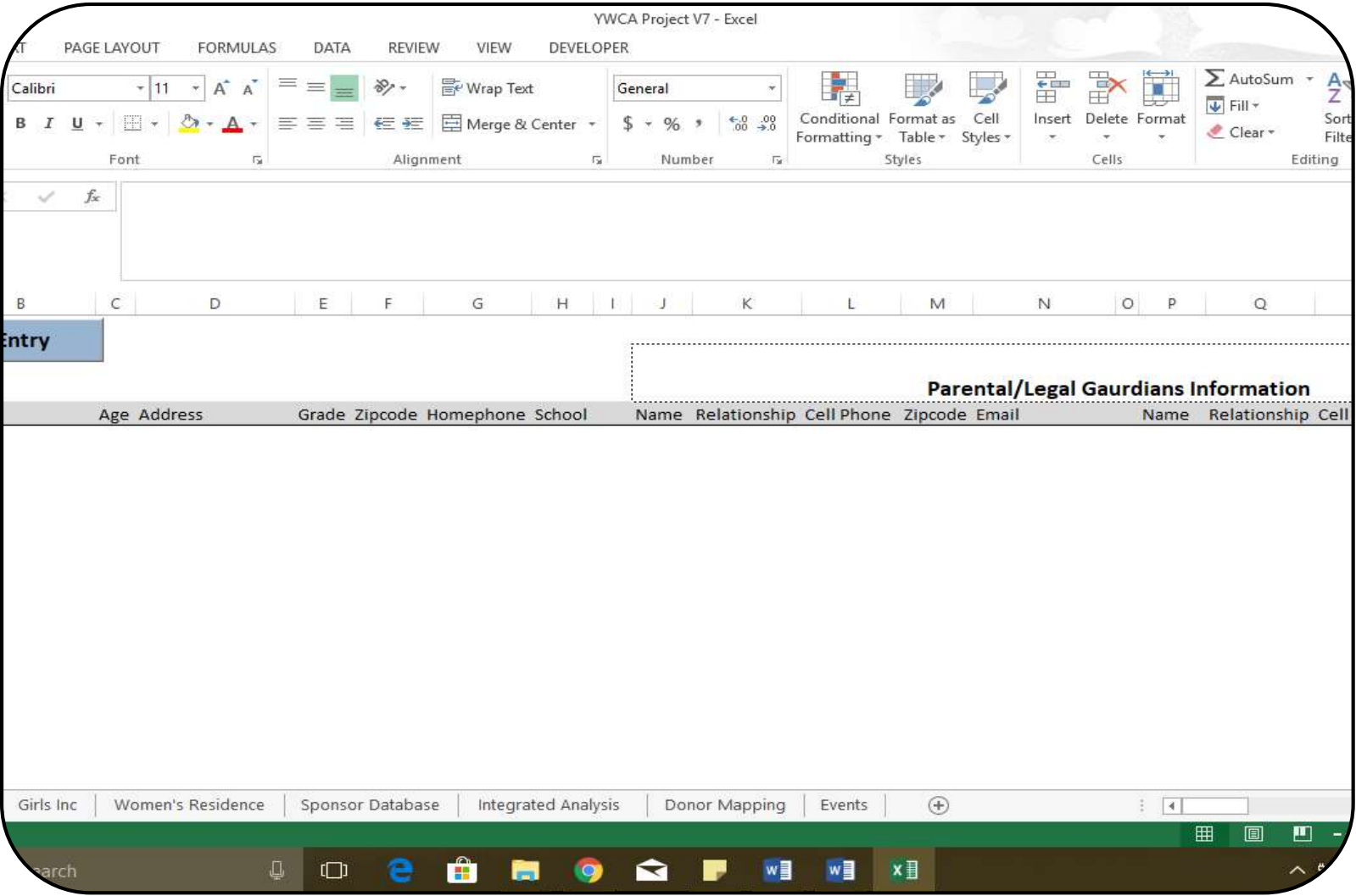*Figure 2: The file will open and will ask for link Update*

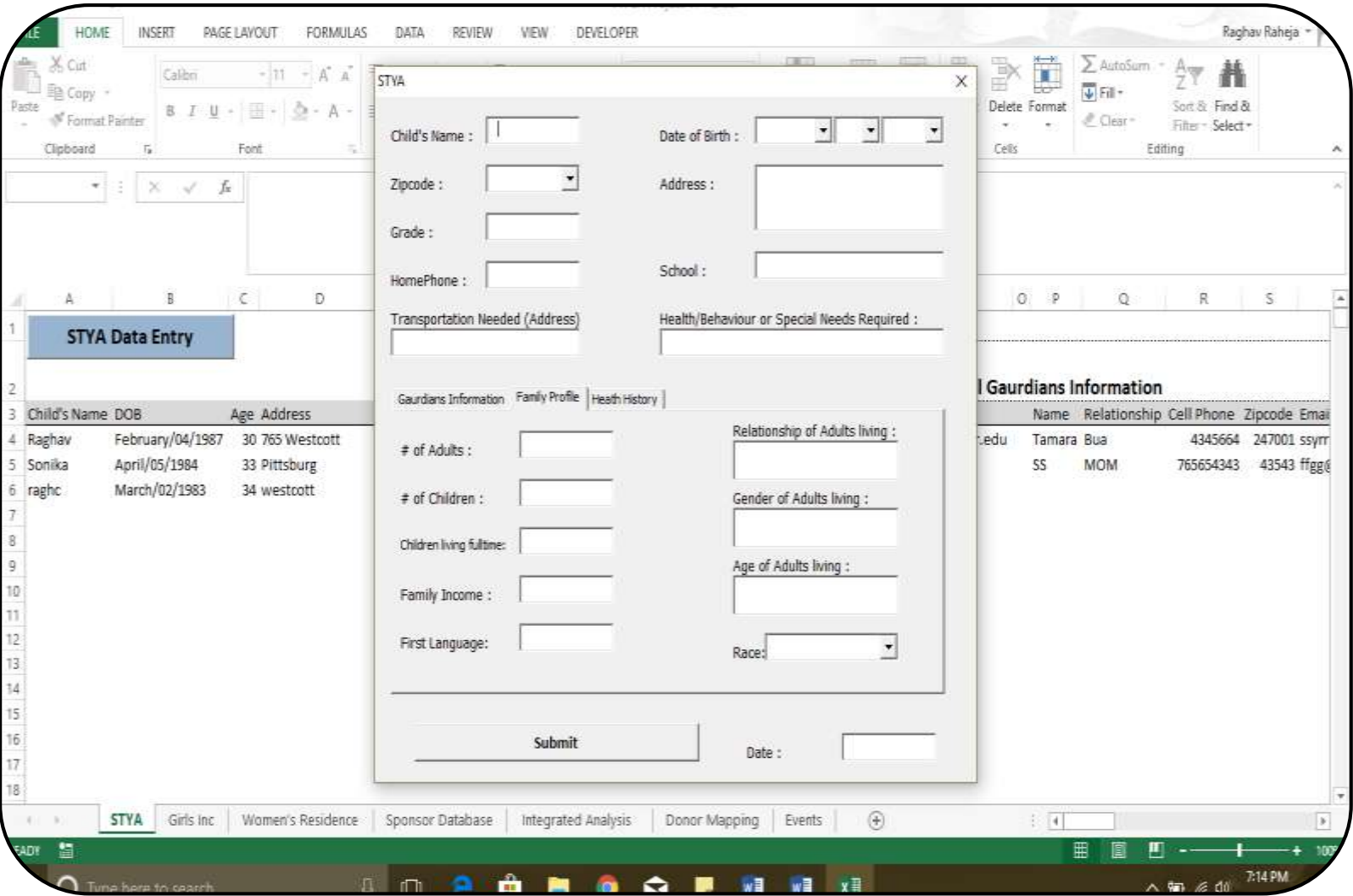*Figure 3: The workbook will look like this after opening*

Figure 4: You can Input Data Manually by pressing the "STYA Data Entry" button on the top left. Similarly for all the programs in other sheets
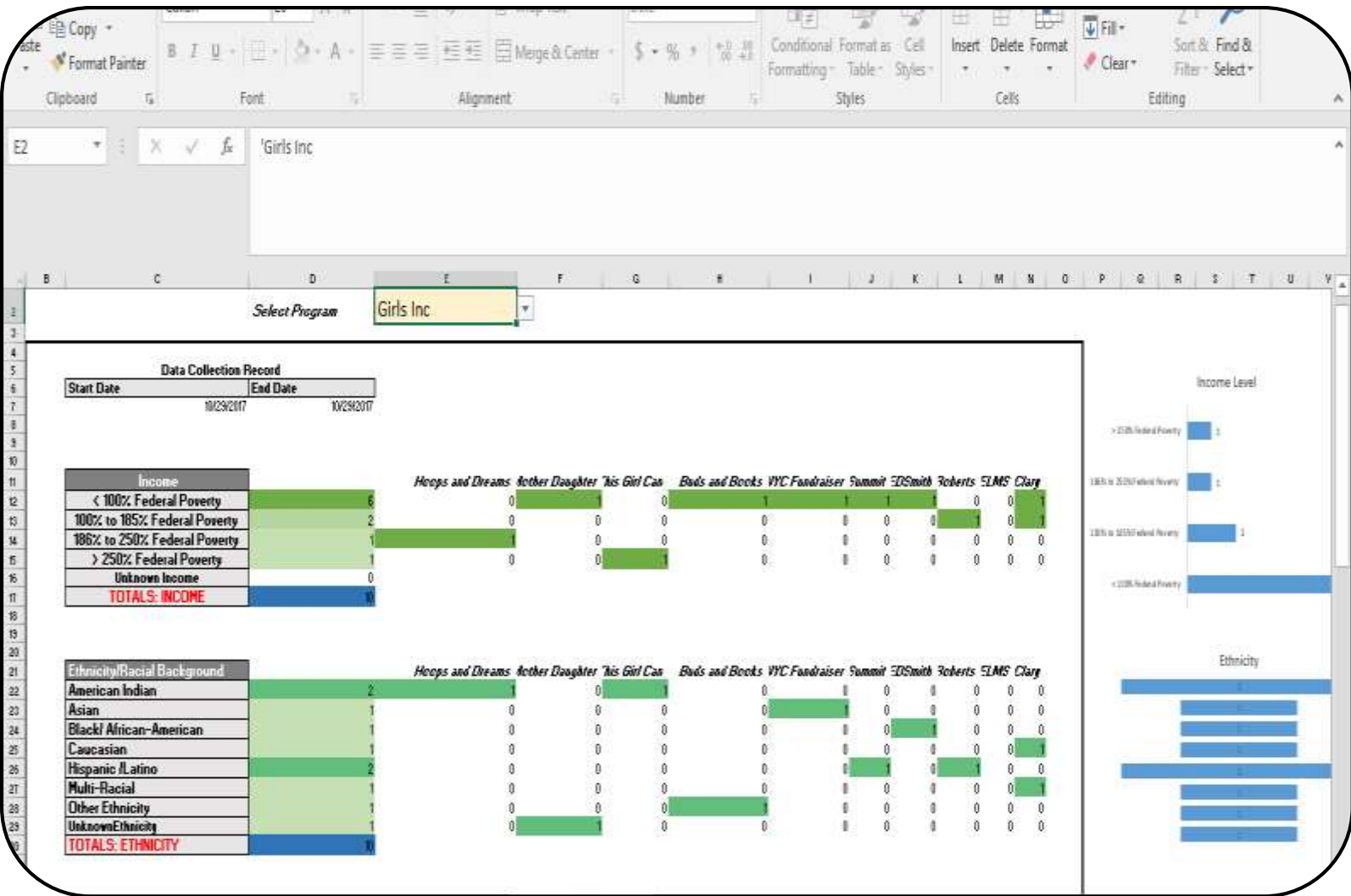
Figure 5: The Analysis and visualization can be generated by selecting the program from the dropdown on the top

Figure 6: Donor Details can be mapped in the donor mapping sheet by selecting the name of the Donor from the dropdown on the top

Additional Directives

It is recommended that when the user wants to paste some data, there is an option under file "Paste". Use this function to paste as value, otherwise any subsequent change in the filter will change the data copied from the original place. A shortcut for doing this is Alt+H+V+V.

In case the user wants to add additional years in Donor Sheet and wish to wish to map it on the "Donor Mapping" sheet. The steps are mentioned as follows:

1. Open the Excel Workbook.
2. Open the "Sponsor Database" sheet.
3. Select "Review" from the taskbar.
4. Choose "Unprotect Sheet" using the password to edit the sheet.
5. Go on the last empty column and write the year you wish to add (for example 2018).
6. Now, go on sheet "Donor Mapping" and follow the 3rd and 4th step again.
7. Go on the last empty row in column "B" to add the year to be mapped (2018)
8. Go on "G21" and press "F2" and copy the whole code. The code will look something like this:

    =VLOOKUP($G$2,'Sponsor Database'!$A$3:$V$1000,'Sponsor Database'!$L$2,0)

9. Paste the code in front of the year you just entered. In this code, replace the alphabet V with the alphabet where new year has been added, similarly, replace L with the alphabet where user is entering the new year in the sheet "Sponsor Database".
10. To rectify the uneven formatting of the chart on the cell, go to "Home" and select conditional formatting and choose the third option from data bars.

Suggestions

- The forms cover a lot of data that can be derived from other question. These can be reduced to reduce the size of the form.
- The attendance for events is not projected in the final report. It will be easier to note down the number of attendees instead of the attendance if the final projection is "Number of Participants".
- It will be easier to map Income if it is a number, instead of a range. If it is difficult to find the exact amount, every range should be a allocated a specific amount (like an average) so that the projection becomes easier.
- There are a lot more analysis that can be done from the data collected. It will depend on requirements from the sponsor. However, mapping individual beneficiary will help access growth from bottom to top. These mappings can be used as case studies in the sponsor report (qualitative analysis).
- The report generated currently focus a lot on numbers and are a little difficult to understand. It will be beneficial if the data can be represented in form of infographics for better visibility and design. It will also make the report concise and efficient.