

Scotiabank Centre for Non-Profit Excellence

Login and Account Creation Instructions



Presented by the Scotiabank Centre for Non-Profit Excellence

This instruction manual is for new users. Returning users should look to the instruction package titled “returning users” located on the website below.

These instructions will enable users to create a first time account and navigate Moodle. If you are a returning user (already have created a login) then please locate the instruction package “Returning User” to log back into the Scotiabank Centre for Non-Profit Excellence course offerings.

Step 1. Visit: www.okanagan.bc.ca/npc

Step 2. Scroll to the Training section

Step 3. Click on the “Register now” button

Training

You can use the training resources as often as you would like, and enter and exit each topic area at the module or points you need. We encourage you to share these resources with others at your organization and through your networks!

What's available

Training resources to assist non-profit organizations build capacity and skill development in areas determined during gap analysis research.

- collaboration and collective impact
- financial management
- fraud
- impact reporting
- project management
- servant leadership
- social enterprise
- strategic plan implementation
- fundraising

These materials are flexible and geared to individual self-paced learning. There is no evaluation or review of your work by an outside instructor; it is informational and skill-based for your own growth and development.

New user registration

Launch the training site (Moodle) and click on "I don't have a moodle account." This will prompt a quick online form to register with your name, email and a password you create and confirm.

Register now

Returning user login

Launch the training website (Moodle) and select the green "Manual Login" option. Once you enter your information, you will be redirected to the training page.

Log into training site

You will then be brought to this page, where you will need to click on the “I don’t have a Moodle account”



Register

Sign-In

[I don't have a moodle account](#)

Username

If you are a student at Okanagan College your username is your student id (300 number) otherwise it will be your email address.

Password

Courses

- Centre for Non-Profit - Project Management
- Centre for Non-Profit - Financial Management
- Centre for Non-Profit - Impact Reporting
- Centre for Non-Profit - Servant Leadership
- Centre for Non-Profit - Fraud
- Centre for Non-Profit - Social Enterprise
- Centre for Non-Profit - Fundraising
- Centre for Non-Profit - Strategic Plan Implementation
- Centre for Non-Profit - Collective Impact

Step 4. Fill out the following information:



Register

Sign-Up

[I already have a moodle account](#)

First Name

Last Name

Email

Password

Confirm Password

Courses

- Centre for Non-Profit - Project Management
- Centre for Non-Profit - Financial Management
- Centre for Non-Profit - Impact Reporting
- Centre for Non-Profit - Servant Leadership
- Centre for Non-Profit - Fraud
- Centre for Non-Profit - Social Enterprise
- Centre for Non-Profit - Fundraising
- Centre for Non-Profit - Strategic Plan Implementation
- Centre for Non-Profit - Collective Impact

Once complete you will be brought to this page and will need to click on the “click here to login” button:



Scotiabank Courses

Registered



, you have been registered for the following courses! [Click here to login.](#)

- Centre for Non-Profit - Project Management
- Centre for Non-Profit - Financial Management
- Centre for Non-Profit - Impact Reporting
- Centre for Non-Profit - Servant Leadership
- Centre for Non-Profit - Fraud
- Centre for Non-Profit - Social Enterprise
- Centre for Non-Profit – Fundraising
- Centre for Non-Profit - Strategic Plan Implementation
- Centre for Non-Profit - Collective Impact

Step 5. Once brought to this Moodle page, you will be required to enter in your newly created username and password:

Log in

Username

Password

Remember username

[Forgotten your username or password?](#)

Cookies must be enabled in your browser

Moodle Help - Copyright Info - You are not logged in.

Is this your first time here?

Please note that this login page is for manual login accounts only.

You should not attempt to login from this page unless you have been specifically instructed to do so.

If you have an Okanagan College issued ID number, you should be logging in at the following link:

[myOkanagan Login](#)

Upon clicking this link, you will be re-directed to the myOkanagan website. After entering your myOkanagan username and password, you will be authenticated and returned to your Moodle Dashboard page.

If you are having difficulties logging in, please contact the Okanagan College IT Services Help Desk via one of the following methods:

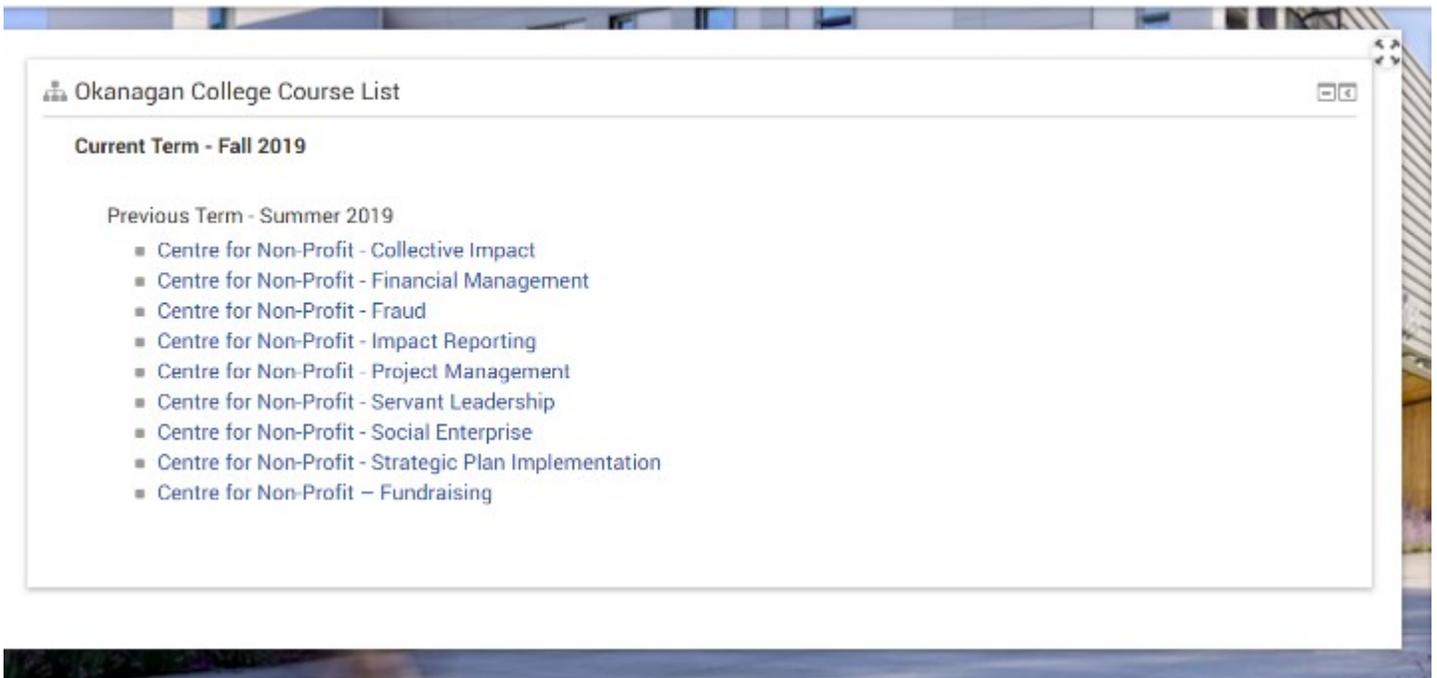
[250-762-5445](tel:250-762-5445) Ext. 4444 or [1-866-839-4032](tel:1-866-839-4032) (Toll Free)

support@okanagan.bc.ca

[Live Support Chat](#) (business hours only)

Once logged in - you will be brought to this page:

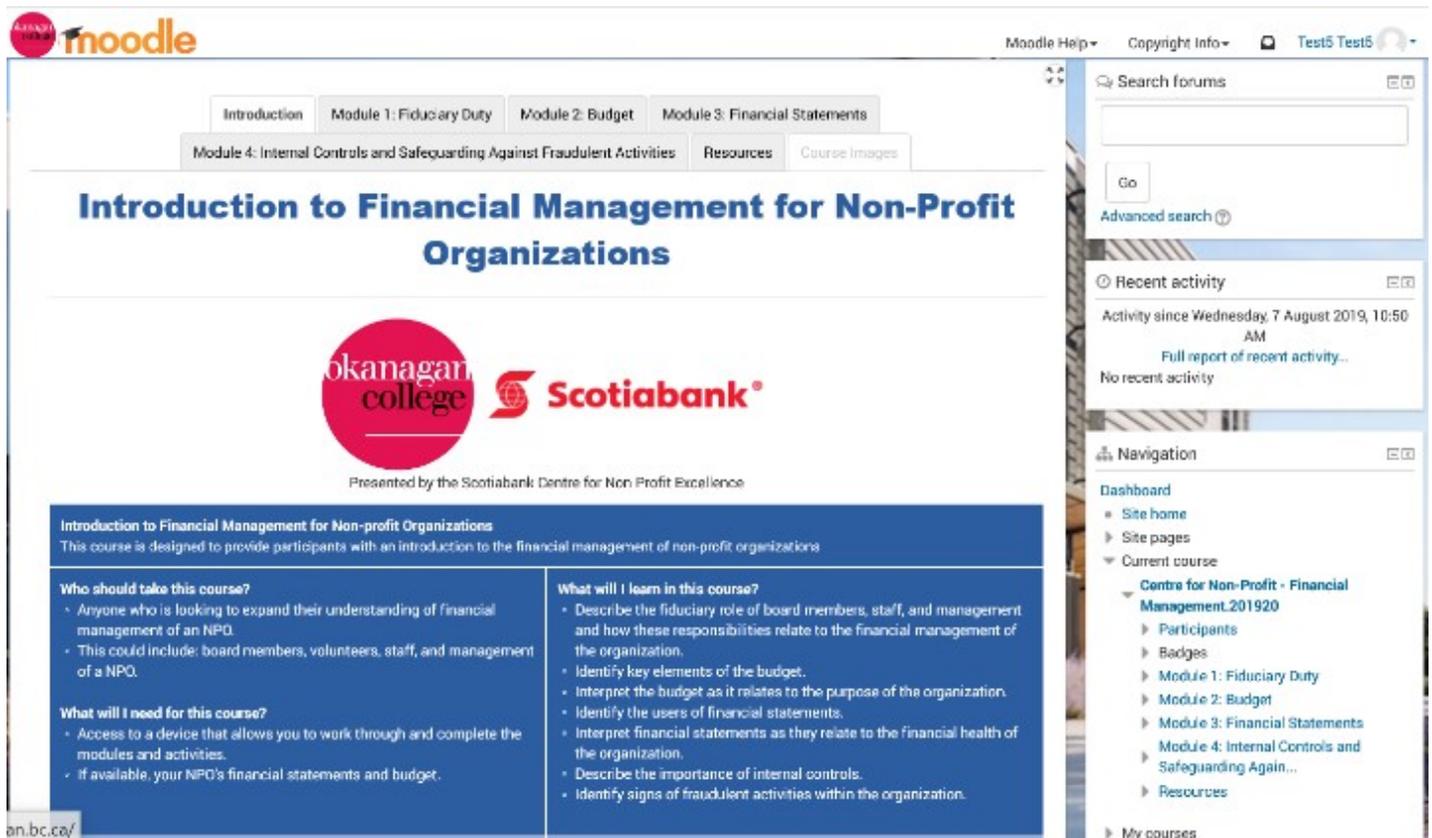
Dashboard



The screenshot shows a Moodle dashboard window titled "Okanagan College Course List". Under the heading "Current Term - Fall 2019", there is a list of course categories for the "Previous Term - Summer 2019":

- Centre for Non-Profit - Collective Impact
- Centre for Non-Profit - Financial Management
- Centre for Non-Profit - Fraud
- Centre for Non-Profit - Impact Reporting
- Centre for Non-Profit - Project Management
- Centre for Non-Profit - Servant Leadership
- Centre for Non-Profit - Social Enterprise
- Centre for Non-Profit - Strategic Plan Implementation
- Centre for Non-Profit - Fundraising

Step 6. Choose any of the courses on your dashboard. Once on the landing page for a course (as shown below) completion of the course is explained throughout.



The screenshot shows the Moodle course landing page for "Introduction to Financial Management for Non-Profit Organizations". The page features a navigation menu with the following items: Introduction, Module 1: Fiduciary Duty, Module 2: Budget, Module 3: Financial Statements, Module 4: Internal Controls and Safeguarding Against Fraudulent Activities, Resources, and Course Images. The course title is prominently displayed in blue. Below the title, the logos for Okanagan College and Scotiabank are shown, along with the text "Presented by the Scotiabank Centre for Non Profit Excellence".

The main content area is divided into two columns:

- Who should take this course?**
 - Anyone who is looking to expand their understanding of financial management of an NPO.
 - This could include: board members, volunteers, staff, and management of a NPO.
- What will I need for this course?**
 - Access to a device that allows you to work through and complete the modules and activities.
 - if available, your NPO's financial statements and budget.
- What will I learn in this course?**
 - Describe the fiduciary role of board members, staff, and management and how these responsibilities relate to the financial management of the organization.
 - Identify key elements of the budget.
 - Interpret the budget as it relates to the purpose of the organization.
 - Identify the users of financial statements.
 - Interpret financial statements as they relate to the financial health of the organization.
 - Describe the importance of internal controls.
 - Identify signs of fraudulent activities within the organization.

The right sidebar contains a search forum, recent activity (showing activity since Wednesday, 7 August 2019, 10:50 AM), and a navigation menu with the following items: Dashboard, Site home, Site pages, Current course, Centre for Non-Profit - Financial Management.201920, Participants, Badges, Module 1: Fiduciary Duty, Module 2: Budget, Module 3: Financial Statements, Module 4: Internal Controls and Safeguarding Again..., Resources, and My courses.

The instructions detailed below show how to navigate through a course in Moodle once you have completed the registration process.

Step 1: Click on a course you wish to complete - the example below showcases the Fundraising course.

The screenshot shows the Moodle course interface. At the top, there are navigation tabs for 'Introduction', 'Module 1: Fiduciary Duty', 'Module 2: Budget', 'Module 3: Financial Statements', 'Module 4: Internal Controls and Safeguarding Against Fraudulent Activities', 'Resources', and 'Course Images'. The main heading is 'Introduction to Financial Management for Non-Profit Organizations'. Below this, there are logos for 'okanagan college' and 'Scotiabank®', with the text 'Presented by the Scotiabank Centre for Non Profit Excellence'. A blue box contains the course description: 'Introduction to Financial Management for Non-profit Organizations. This course is designed to provide participants with an introduction to the financial management of non-profit organizations'. Below this, there are two columns of text: 'Who should take this course?' and 'What will I learn in this course?'. On the right side, there is a search bar, a 'Recent activity' section, and a 'Navigation' menu with options like 'Dashboard', 'Site home', 'Site pages', 'Current course', and 'My courses'.

Step 2: Read through the main page for details about the course including: how long each module will take, what information you can expect to learn, and what materials you will need to complete the course.

Step 3: Scroll to the bottom of the main page and click on the large blue button to begin the course.

To understand the content of the course, it has been separated into the following five modules.

Module 1: An Introduction to Fundraising

Module 2: Fundraising Strategy

Module 3: Methods of Fundraising

Module 4: Social Media

Module 5: Performance Measurement

To navigate the course, click on the **Next** button at the bottom of each page, if you would like to return to a previous page, click on the **Previous** button.

Let's Get Started!

Step 4: After clicking on the start button you will be brought to the first module of the course where you will be given a brief overview of that individual module. Click the 'begin' button at the bottom of the page to start the module.



Module 1: An Introduction to Fundraising

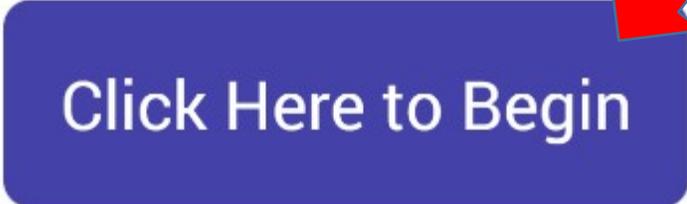
Introduction to the Module

In this module, a glossary of terms is provided and statistics are defined. Additionally, the importance of strategic fund development is explained, as well as several common fundraising difficulties non-profit organizations face will be discussed.

After completing this module you should be able to differentiate between different terms, distinguish the role of philanthropy, fund development and fundraising as well as identify common fundraising problems.

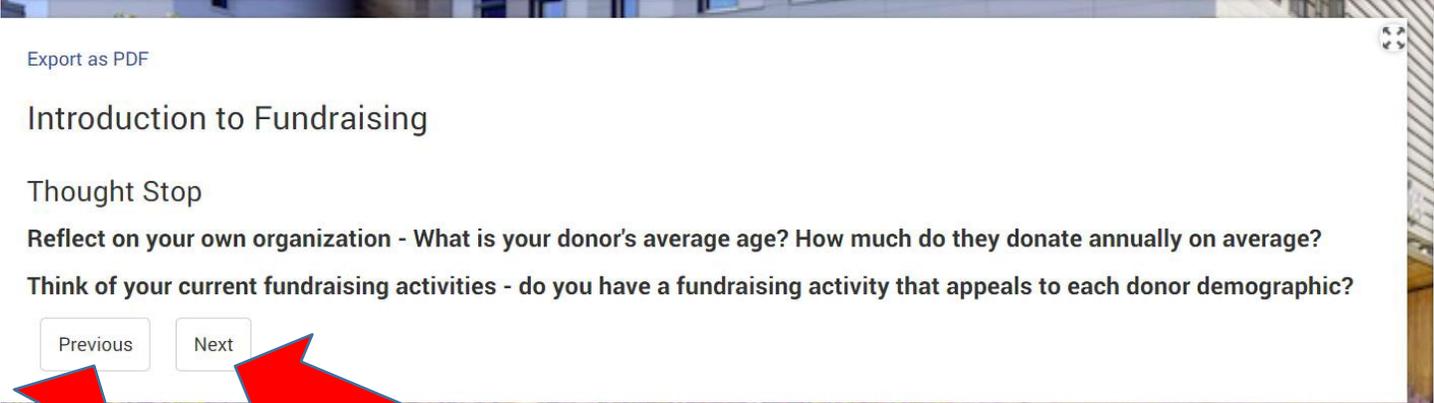
Glossary of Key Terms

Please [click here](#) for a copy of the glossary you can print or read electronically.



Step 5: You will then be brought into the module where you can navigate the course using the buttons located on the bottom.

[Dashboard](#) / [Other](#) / [Sandbox Courses](#) / [Centre for Non-Profit – Fundraising.201920](#) / [Module 1: An Introduction to Fundraising](#) / [Introduction to Fundraising](#)



Export as PDF

Introduction to Fundraising

Thought Stop

Reflect on your own organization - What is your donor's average age? How much do they donate annually on average?

Think of your current fundraising activities - do you have a fundraising activity that appeals to each donor demographic?

[Previous](#) [Next](#)



Step 6: If at any point while you are completing a course, you wish to return to the listing of course offerings click 'dashboard' in the top left corner.



Step 7: You will then be brought back to the course listings where you can choose to continue your current course or begin a new one.

Step 8: Once you have begun a course, you can always navigate between modules by using the top bar which lists all of the modules in an individual course. Click on the module you would like to be directed too.

