



## **TERMS OF REFERENCE (TOR)**

### **TRAINING ON EXCEL**

#### **BACKGROUND**

Excel is one of the most widely used solutions for managing data, including entering, manipulating, analyzing and visualizing data. It now also, includes tools that enable the analysis of more data, with improved visualization and more sophisticated logic tools.

Within PAHAL, most of our partners and staff use excel and all our data are available in excel formats. Hence, as PAHAL moves to our objective of “Data Use” by all staff, it is important for all staff to be equipped with the knowledge and skills of Effective Use of Excel.

The goal of this course is to provide theoretical understanding as well as hands-on practical skills on basic and advanced excel techniques to support PAHAL staff on data manipulation, data management, and information creation. This training is a part of the programs’ goal to improve data use. Before being able to manipulate data into meaningful information (tables, graphs, charts, and maps), training participants should be familiar with PAHAL data which includes why data are being collected, which data are being collected, and how they are collected. Once the datasets are understood, participants will better be able to learn about how these data can be turned into results and meaningful findings.

#### **OBJECTIVES**

By the end of the training, participants should be able to:

- Understand basic excel (open datasets, format dataset in proper view modes, create simple calculation formulas, format printable dataset).
- Use advanced formulas (IF, AND, AVERAGE, SUM, MEAN, embedded statements) and work with various tools (tables, pivot tables) to analyses data in spreadsheets.
- Organize table data, present data as charts, and enhance the look and appeal of workbooks by adding graphical objects.
- Develop dashboards.



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### TRAINING CONTENT

#### Basic Excel

##### Excel Introduction

- Overview of the screen, navigation and basic spreadsheet concepts
- Various selection techniques
- Shortcut keys
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##### Data table

- Create a data table
- Changing the Look of a Table
- Add new rows or columns
- Removing duplicate rows from a table
- Hiding or grouping rows and columns
- Setting table options
- Multiple-column sorting
- Converting a table back to a range
- Entering data automatically with auto fill
- Placing Information into multiple cells simultaneously
- Using AutoCorrect for shorthand data entry
- Selecting special types of cells
- check spelling
- Entering numbers with fractions
- Formatting numbers
- Working with dates and time
- Changing text alignment
- Selecting Ranges
- create a named range from a selection
- display the Name Manager
- edit a named range
- Pasting in special ways: Paste Formulas and formats
- Paste Validation

- Performing mathematical operations without formulas
- Skipping blanks when pasting
- Transposing tables
- Paste Link

##### Exploring excel database feature

- Sort a data list
- Sort a data list by values in multiple columns
- Sort worksheet data by a custom list of values
- Delete a sorting level
- Organize worksheet data into groups
- Show and hide levels of detail in a grouped data list
- Remove grouping levels from a data list
- Apply a filter to a worksheet
- Clear a filter
- Display the top or bottom values in a column
- Special Filter for Dates, Text, and Numbers
- Advance Filter
- Calculating formulas across worksheets
- Import data from an external source

##### Mathematical functions

- The Basic SUM, COUNT, MIN, And MAX
- AVERAGE, MODE, MEAN, And MEDIAN
- SUMIF For Selective Adding Up
- COUNTIF For Selective Counting
- AVERAGEIF For The Mean Of Selected Cells



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- Multiple Criteria Within SUMIF, COUNTIF, And AVERAGEIF
- Area And Volume Calculations
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### Printing

- Printing row and column titles
- Scaling printed output
- Force Excel to print using a specific number of pages
- Printing cell gridlines
- Change the order in which worksheets print
- Print part of a worksheet
- Center material on the printed page
- Print a chart
- Add a header or footer to a worksheet
- Create an Auto Header
- Add an image to a header or footer
- Format an image in a header or footer

### Intermediate Excel

#### Creating charts and graphics

- Create a chart
- Choosing Chart types
- Change how Excel plots your data
- Remove a series from an axis
- Add a series to an axis
- Move a chart to its own worksheet
- Apply a Chart Style to a chart
- Apply a different layout to a chart
- Change the appearance of a chart's gridlines
- Select a chart element for formatting
- Select a data point in a series
- Format a chart element
- Save a chart as a chart template
- Add a trendline to a chart
- Create a PivotChart
- Change the chart type of a chart or PivotChart
- Using Slicers, Filter data with slicers

#### Creating dynamic lists with pivot tables

- What Is A PivotTable?
- The New Recommended PivotTable Route
- Creating Your Own PivotTables
- PivotTable Styles
- Multiple Fields In Row, Column, Or Data Sections
- Sorting The PivotTable Columns
- Refreshing A PivotTable
- Creating And Using Calculated Fields
- Changing The Formatting And Formulas In PivotTable Summaries
- Creating Multiple PivotTables On The Same Dataset
- Moving And Deleting PivotTables
- Making Use Of The Report Filter Options
- Drilling Down Behind The Pivot Numbers
- Controlling Grand Totals And Subtotals
- Dealing With Empty Cells And Other Additional Options
- Using The New Timeline Filter Option
- Adding And Using The Data Slicer

#### Creating Pivot Charts

- Creating A PivotChart
- Changing The Fields Used In A PivotChart
- Formatting The PivotChart
- Changing The PivotChart Type
- Filtering A PivotChart
- Hiding The PivotChart Buttons
- Moving And Deleting PivotCharts
- Adding slicer tools

### Advanced Excel

#### PERFORMING DATA LOOKUPS

- VLOOKUP: Syntax And Usage
- VLOOKUP In Live Action



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- HLOOKUP: Variation On A Theme
- Using A Near Match In The Lookup
- Dealing With Missing Data In A Lookup
- Managing The Lookup Table
- Lookups Nested Within Lookups
- Creating A Sparkline
- Altering The Design Of Sparklines
- Dealing With Empty Cells
- Comparing Sparklines Within A Sparkline Group
- Removing Sparklines From A Worksheet
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### Data validation

- Data Validation
- Create a validation rule
- Number, Date and Time selection
- Text and list validation

### Excel dashboard

- Planning a Dashboard
- Adding tables and charts to Dashboard
- Adding dynamic content to Dashboard

### Sparklines



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### PARTICIPANTS

		Quantity	Remarks
<b>PAHAL Central</b>	<b>All MEL and Component Staff</b>	24	One Training
<b>PAHAL Regional</b>	<b>All MEL and Component Staff</b>	57	2 Trainings , one in each regional office
<b>PAHAL District</b>	<b>All MEL and Component Staff</b>	340	14 trainings, once in each district office
		Approx. 421	

**Note:** The training needs to take place separately in each PAHAL Office, Central, regional and District LNGO.

The details of the office are as follows:

1. PAHAL (Central Office)  
Sanepa Chowk, Lalitpur
2. PAHAL Regional Office (Mid- Western Region)  
Karkando, Nepalgunj
3. PAHAL Regional Office (Far- Western Region)  
Kirtipur, Amargadhi, Dadeldhura

#### **Office in District:**

##### **Mid- West:**

1. Dailekh  
Narayan MCP-1, Puranobajar
2. Jajarkot  
Khalanga VDC-1
3. Pyuthan  
MCP-19, Khaira
4. Rolpa  
Libang-7
5. Rukum  
Musikot Municipality-1



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6. Salyan  
Sarada-4, Khalanga

7. Surkhet  
Ward#9, Birendranagar

### **Far- West:**

1. Achham  
Safebagar-6

2. Baitadi  
Dashrathchand-1, Gothlapani

3. Bajhang  
Jayaprithivi-4, Chainpur

4. Bajura  
Badimalika-12, Martadi

5. Dadeldhura  
Amargadi-5, Tufaandanda

6. Darchula  
Api-13, Khalanga

7. Doti  
Jijodamandu-1, Uchhakot

### **TIME FRAME**

**Training Date:** TBD / To be provided in the proposal by the bidder, based on training content requirement and travel plans