



Excel for monitoring & evaluating impact

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- 1) Freeze panes allows you to control areas of the spreadsheet to be fixed as you scroll.
 - a. Go to the **View** tab and select **Freeze Panes** (click arrow at bottom right for this to drop down as below)

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4	2	Claire	Evans				SM1 1AD	Current		anoughtin	rest of the worksheet.	1

- b. Now select either to freeze the row above and to the left of the cell your cursor is in or alternatively just to freeze the first row or first column.
- 2) Hide columns is a way of only seeing data you need and very useful if your spreadsheet has lots of columns.
 - a. Highlight the column/s you want to hide by selecting the column letter/s at the top and if more than one dragging across
 - b. Next right click and select Hide

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18	11	Joanna	Green			Unni	JC.		1

c. To Unhide – select the columns either side of the hidden columns and then right click again and select to Unhide.

- 3) Sorting column information.
 - a. First select the column you want to reorder, then go to the Data tab and select the AZ \downarrow option.
 - b. You will then see a warning box asking Do you want to expand the selection? This is to safeguard against just sorting this column in isolation (i.e. not rearranging the other column information in line with this one – ending up with rows of information being mixed up).

Sort Warning	? 🗙
Microsoft Excel found data next to your selection. selected this data, it will not be sorted.	Since you have not
What do you want to do? © Expand the selection © Continue with the current selection	
<u>S</u> ort	Cancel

c. A safer option is to select the whole sheet (highlight the top left hand cell) and then select the Sort icon in the Data tabs, as below



d. The Sort dialogue box opens up and here you can select the Columns that you want to sort. Remember to tick the My data has headers box if relevant.

Sort				? 💌
* <u>A</u> ↓ <u>A</u> dd	Level X Delete Level	E Copy Level	Options	My data has <u>h</u> eaders
Column		Sort On	Order	
Sort by	Column F 🗾	Values	👻 A to Z	-
				OK Cancel

e. You can Sort by any number of criteria by selecting Add level.

* <u>A</u> dd Le	evel X Delete Level	E Copy Level	ptior	ns Wy data has <u>h</u> eaders
Column		Sort On		Order
Sort by	Date 💌	Values	•	Oldest to Newest
Then by	Organisation name 👻	Values	•	A to Z

In the example above – we've chosen to sort by Date - Oldest to Newest and then alphabetically by Organisation name.

4) Splitting columns of data

a. Highlight the column you want to split, go to the Data tab and then select Text to Columns

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b. Now check the Delimited option is selected and then click Next



c. Now select the appropriate Delimiter which in this case is the Space option between first and second name, and then click Finish

Convert Text to Columns Wizard - Step 2 of 3	
This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.	
Delimiters Tab Semicolon Gomma Fext gualifier: Qther:	
Kate White Sorrel Parsons Sue Quiter Colin Dregan Nine Het	
Cancel < <u>Back</u> <u>Mext</u> > <u>Finish</u>	

- 5) Filtering data allows you to see a subset of your data (in terms of rows) based on criteria you select.
 - a. Select the column containing the data you want to Filter on, then select the Data tab and click on the Filter icon

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b. There should now be a drop down arrow in the header cell for that column

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1	First name	Surname	Post code	Status 🔭 💌	No. c
2	Alison	Stanley	SM1 1BA	Inactive	
3	Becky	MacRae	SM1 1AX	Current	
4	Chris	Evans	SM1 1AD	Current	
5	Christine	Scott	SM1 3NQ	Waiting list	
6	Claire	Smith	SM1 1AY	Waiting list	
7	Healah	Siddia	SM1 1BN	Current	

c. If you click on the down arrow you can then select / deselect the options you want to filter on



d. The Filter icon then displays in place of the down arrow to indicate a Filter has

been switched on

	В	С	G	H
1	First name	Surname	Post code	Status 🔭 🗐
2	Alison	Stanley	SM1 1BA	Inactive
17	ol	Soares	SM1 1QD	Inactive
18	Joanna	Green	SM1 1AZ	Inactive
21	Rupeeka	Riazi	SM3 8BJ	Inactive
22	Kathleen	Ghuman	SM3 8BP	Inactive
23	Kathy	Jenkins	SM5 1HP	Inactive
31	Mireide	Williams	SM2 7PY	Inactive

- 6) Printing there are a number of options to make printing spreadsheets easier and importantly easier to read.
 - a. To set it so that row or column headers repeat when printing across a number of pages (much like the Freeze pane option for viewing on screen when scrolling) go to the Page Layout tab and then select the Print titles option
 - b. Now put your cursor in the 'Print titles Rows to repeat at the top' box and then highlight the header row in your spreadsheet

Page Setup				8 ×
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- c. Now select Print Preview to check before selecting Print.
- d. To just print part of your worksheet, select the area you need and go to Print and

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Account	Only print the active sheets Print Entire Workbook Brint Heatine workbook
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	Ignore Print Area

then choose Print selection

- e. If you have a large spreadsheet you might also want to use the Scale to print options.
- f. Select the drop down arrow from the bottom option Fit Sheet on One Page and choose the best option for the size / shape of your spreadsheet.
 (If you go to the Page Layout tab you can also adjust margin sizing)

Export	Settings
Close	No Scaling Print Active Sheets No Scaling Print sheets at their actual size
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Options	Fit All Columns on One Page Shrink the printout so that it is one page wide
	Fit All Rows on One Page Shrink the printout so that it is one page high
	Custom Scaling Options
	Fit Sheet on One Page
	Page Setup

7) Basic calculations & formulae

Always start with an = and then the order of operations is Divide (/) Multipy (*) Add (+) Subtract (-). To 'force' Excel to do differently – use Brackets e.g.

5+3*2 = 11

but...

(5+3)*2 = 16

Check the Formula bar to see if your formula is correct

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8) Copying Formulae

a. To copy formulae either use the Fill command and then select Down, Right, Up or Left

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- b. Alternatively select the cell with the formula in and then use the Ctrl D shortcut and drag to copy Down to cells beneath
- c. Or Select the cell with the formula in and then hover over the filled in square in the bottom right and when the cursor becomes a + then drag the box down to cover the relevant cells and the formula will be copied.



9) Absolute Cell references

- a. Sometimes, instead of your formulae automatically updating its references as you copy down / across on a spreadsheet you may want to include a fixed element in your calculations.
- b. To do this use the \$ operator before the letter and number cell reference e.g. \$A\$D
- 10) AutoSum is used to quickly sum up numbers in a row or column.
 - a. First highlight the numbers in question and then select the AutoSum icon from the Home tab (or Formula tab)

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b. AutoSum will calculate the total and display this in the next cell.

11) Age calculation formula

a. Calculating Age from Date of birth

= YEAR(TODAY()) - YEAR(L2) - IF(L2 - DATE(YEAR(L2), 1, 1)) > TODAY() - DATE(YEAR(TODAY()), 1, 1), 1, 0)

Remember to change the DOB reference cell which in this case is L2

12) Average & Max / Min

a. These all work in the same way – highlight the range of cells in question and then select the Function you need.

13) COUNTIF

- a. This is a really useful function to add up numbers of times a certain criteria is present in a specified range of cells.
- b. It uses the following formula =COUNTIF(range, criteria) and the criteria can either be a number, value or cell reference
- c. Select the range of cells and then the criteria e.g. =COUNTIF(H2:H50, R36) or COUNTIF(H2:H50, "Current") (this will return the same result where Current is an entry in the Column H)

- 14) IF this checks whether a condition is met and returns one value if True and another if False
 - a. Use the formula =IF(criteria, "option1 to display if true", "option 2 to display if false")

For example =IF(C3>B3,"Targets met", "Targets unmet")

15) Remove duplicates

- a. Another handy way to see how many unique entries are in a column is to remove duplicates.
- b. Highlight the column in question and go to the Data tab and select Remove Duplicates

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32	Orga	nisation K		21/03/2014		1		3		2													
33	Orga	inisation L		21/12/2013		1		3		2													

c. Select the column with duplicate values and click OK

Remove Duplicates		le le	x
To delete duplicate values, sel	ect one or more colu	imns that contain dup	olicates.
ई≣ Select <u>A</u> ll ∄≣ <u>U</u> nse	lect All	✓ My data has	headers
Columns			
Organisation name			
		OK	Cancel

d. Excel will then return the column of data minus duplicates and indicate how many have been removed.



16) Conditional formatting

a. Select the required column / area of worksheet and then in the Home tab select Conditional Formatting

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15	Organisation C	21/12/2013	2	4	2							
16	Organisation C	21/02/2014	2	5	3							
17	Organisation D	21/01/2014	2	3	1							
18	Organisation E	21/09/2013	2	1	-1							
19	Organisation E	21/09/2013	3	5	2							

b. There are a number of options including Highlighting Cells based on Rules you can specify as below (red for any less than 2)

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12	Organisation A	21/03/2014	1	3	2										
13	Organisation B	21/11/2013	2	4	2										
14	Organisation B	21/01/2014	2	5	3										
15	Organisation C	21/12/2013	2	4	2										
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13	Organisation B	21/11/2013	2	4	2								
14	Organisation B	21/01/2014	2	5	3								

c. Alternatively you can employ an automated traffic light Colour Scale!

17) Validating data entry - Excel also allows you to pre-set criteria with which to validate

cell entries.

- This enables you to ensure consistency & standardisation particularly useful if a number of people are entering data.
- 💹 🔒 🍤 🗟 🕫 Excel for M&E training workbo HOME INSERT VIEW PAGE LAYOUT FORMULAS DATA REVIEW Connections Clear Properties **|→**□ A↓ ZAZ → 82 Là $\exists \delta$ -L Reapply Data Consolidate What-If Relation Existing Refresh Z↓ Sort Filter Text to Flash Remove From From From From Other 🔒 Edit Links 🌄 Advanced Access Web Text Sources -Connections All -Columns Fill Duplicates Validation -Analysis -Get External Data Connections Sort & Filter Data Tools Data Validation ÷ P31 \times *f*_x Selena В С G Н М Ν 0 31 Mireide Williams SM2 7PY Inactive Se Sel Sel 32 Serena Gonzales SM5 1HN Waiting list For example, you can provide a list of values, like 1, 2, and 3, or only allow numbers greater than 1000 as valid entries. 33 Pat Bonnington SM4 6PW Current 2 Sel Sel 34 Pat Rawlings SM2 7WJ Current 5 35 Petra Simmons SM4 4PE Waiting list
- b. Go to the Data tab and select Data validation

c. There are a number of criteria you can choose from and you can even put in your own input message to guide / explain to others what's required as well as your own error message.

ata Validat	ion	
Settings	Input Message	Error Alert
Validation	criteria	
<u>A</u> llow:		
Any valu	ue	✓ Ignore blank
Any valu Whole r Decimal List Date Time Text len Custom	ue number gth	
Apply t	these changes to a	II other cells with the same settings
<u>C</u> lear All		OK Cancel

d. If you have a set list of options you want people to select from (and not enter anything else) e.g. ethnicity categories, then choose the List option.

Data Validation	
Settings Input Message Error Alert Validation criteria	
List V Ignore blank Data: V In-cell dropdown	
Source: ='1a'ISCS1:SCS4	
Clear All OK	Cancel

- e. It will now ask you to indicate where this List can be found by selecting the cell range in the Source, as above. Navigate to where you have previously entered list options and highlight - it is a good idea to dedicate a separate Worksheet to your look up lists
- 18) Summary sheets / dashboards linking sheets these take data from other Work-

sheets to feed into summary reports to help with monitoring

- a. Open a new Worksheet and rename
- b. Add the parameters you need to track and then in the formula expression, 'bring in' data from the other Worksheets by selecting cells / ranges as appropriate.
 You will notice in the formula box that this is indicated by a 'Worksheet name'! the cell reference or range

e.g. = COUNTIF('Training stats'!E2:E50,'Training summary'!A31)

- 19) Quick analysis this is a handy short cut option in Excel 2013
 - a. Click any cell in your data and then click Ctrl & Asterisk (the Ctrl key, Shift key and number 8 key)

G	н	I	J	К	L	M	N	0	Ρ	Ŀ
Post code	Status	No. of children	Child 1 dob	Child 1 age	Which volunteer					
SM1 1BA	Inactive	1	28/11/2010	4	Karen					
SM1 1AX	Current	2			Helen					
SM1 1AD	Current	1			Jane					
SM1 3NQ	Waiting list				Jane					
SM1 1AY	Waiting list				Jane					
SM4 9AJ	Current	2			Jane					
SM2 5TQ	Current	1			Jane					
SM4 4PE	Waiting list				Jane					
SM1 1AW	Current	1			John					
SM1 1BN	Current	3			Jane					
SM3 8BQ	Waiting list				John					
SM1 4DL	Waiting list				John					
SM4 4PA	Current	1			John					
SM1 1AB	Current	2			Karen					
SM4 4PF	Waiting list				Simone					
SM1 1QD	Inactive				Karen	Q	uick Analysis (Ct	ri+Q)		
SM1 1AZ	Inactive				Karen	0	se the Quick Ana	lysis tool to analyze your da	ata	
SM1 1BG	Current	1			Karen	y w	ith some of Excel	's most useful	nu -	
SM1 1BH	Current	3			Karen	tools, such as charts, color-cod		ts, color-codin	g,	
SM3 8BP	Inactive				Karen and		nd formulas.			
SM5 1HP	Inactive				Karen					
SM1 1QE	Inactive				Simone	1				
CRAF ALID	C	2			V				_	JĿ
(+)			•						Þ	F

b. Clicking on the Quick Analysis icon then brings up a range of options as below:

Formatting option



Charts option



Tables option - here there is a short cut to Pivot Tables

	limono					
FORMATTI	NG CH	ARTS TO	DTALS	TABLES	SPARKLINES	
Table	PivotTable	PivotTable	PivotTable	PivotTable	More	
Tables help	you sort, filt	er, and sum	marize data			

20) Pivot tables Quick Analysis gives you a number of pre-defined Pivot table options,

selected as the best fit for the data in your worksheet

a. . Hover over the options and select the one that fits your needs (you can make changes later)

L		
2		
3	Row Labels 🔻	Count of Family number
4	Current	20
5	Inactive	13
6	Waiting list	16
7	Grand Total	49
8		
9		

b. You can also create a Pivot table by selecting the worksheet area and then going to the Insert tab and selecting Recommended Pivot Tables

X II FIL	E HOME INSERT	PAGE LAYOUT	FORMULAS	DATA R	EVIEW VI	Evcel for the	icce training work	book students - E	xcel o					? क	— 🗗 Kate White
Pivot	Table Recommended Table PivotTables Tables	Pictures Online Pictures Illustration	Stor	e 🕨 Apps - 🛐 Re	commended Charts		★ * PivotChar *	t Power Lin View	e Column Wi Lo: Sparklines	n/ Slicer Ti ss Filte	meline Hyperlink	Text H Box &	leader Footer	π Equation Ω Symbol	•
L50	• : 🗙 🗸	f_x Unal	located												
	A B	С	D	E	F	G	н	I	J	К	L	M	I N	0	P
1 F	amily number First name	Surname	Address line 1	Address line	2 Town	Post code	Status	No. of children	n Child 1 dob	Child 1 age	Which voluntee	er			
2	12 Alison	Stanley				SM1 1BA	Inactive		1 28/11/2010	4	Karen				
3	9 Becky	MacRae				SM1 1AX	Current		2		Helen				
4	2 Chris	Evans				SM1 1AD	Current		1		Jane				
5	5 Christine	Scott				SM1 3NQ	Waiting list				Unallocated				
6	10 Claire	Smith				SM1 1AY	Waiting list				Unallocated				
7	33 Clare	Woodhouse				SM4 9AJ	Current		2		Jane				
8	42 Daniella	Collins				SM2 5TQ	Current		1		Jane				
9	49 Dominique	Foster				SM4 4PE	Waiting list				Unallocated				
10	8 Donna	Turner				SM1 1AW	Current		1		John				
11	18 Healah	Siddiq				SM1 1BN	Current		3		Jane				
12	24 Jackie	Godowska				SM3 8BQ	Waiting list				Unallocated				

Row Labels Count of Family of Current Inactive Waiting list Grand Total Count of Family numb Row Labels Count of Family number Holan Jane John	number 20 13 16 49 Der mber 1	Ш	Row Labels Count of Family n Current Inactive Waiting list Grand Total	umber 20 13 16 49
Row Labels Count of Family i Current Inactive Waiting list Grand Total Count of Family numb Row Labels Count of Family num Helan Jane John	20 13 16 49 DET mber 1	ш	Current Inactive Waiting list Grand Total	20 13 16 49
Count of Family number Row Labels - Count of Family number Helan John	20 13 16 49 DET mber 1		Inactive Waiting list Grand Total	13 16 49
Grand Total Count of Family numb Row Labels - Count of Family nu Holan Jane John	16 49 Der mber 1	E	Waiting list Grand Total	13 16 49
Grand Total Count of Family numb Row Labels - Count of Family nu Holan Jane John	49 Def mber 1	ш	Waiting list Grand Total	16 49
Count of Family numb Row Labels - Count of Family nu Holen Jame John	Der mber 1	Ш	Grand Total	49
Count of Family numb Row Labels Count of Family nu Holen Jane John	DET mber 1	=		
Row Labels + Count of Family nu Helen Jane John	mber 1			
Holen Jane John	1			
Jane John				
John	4			
	3			
Karen	14			
Selena	3			
Simone	8			
Unallocated	16			
Count of Family numb	per			
Row Labels 💽 Count of Family nu	mber			
Allison	20			
Bood	1			
Bonnington	1			
Burns	1			
Collins	1			
Cregan	1			
Croxted	1			
Dueloe	*			
Count of Family numb	oer			
Row Labels Count of Family nun	nber 20	-		

c. Again you will be presented with a choice of Pivot Tables

- d. Finally you can also start from scratch by opting to inset a Blank PivotTable
- e. The Pivot table side bar is where you can now 'drag and drop' fields around to control the data analysis as you need
- First check the fields you want displayed here we've added the Date field and it is automatically added as a row.
 PivotTable Fields **

Row Labels	Count of Organisation name
81	20
21/09/2013	5
21/11/2013	2
21/12/2013	6
21/01/2014	1
21/02/2014	3
21/03/2014	3
B 2	20
21/09/2013	4
21/10/2013	1
21/11/2013	3
21/12/2013	3
21/01/2014	3
21/02/2014	4
21/03/2014	2
(blank)	
83	8
21/09/2013	6
21/01/2014	1
21/02/2014	1
∃4	1
21/02/2014	1
Grand Total	49

PivotTable Fi	elds •×
Choose fields to add to	o report: 🔅 🔻
Organisation nam Date Initial assessment Final assessment Progress made MORE TABLES	e
Drag fields between a	reas below:
▼ FILTERS	III COLUMNS
■ ROWS Initial assess ▼ Date ▼	Σ VALUES Count of Org ▼

g. Now you can drag the Date field to the Columns quadrant

Drag fields between a	reas below:	
▼ FILTERS	Date -	
■ ROWS Initial assess ▼	∑ VALUES Count of Org ▼	-

h. This will automatically update the table as below, now displaying dates across as columns

Count of Organisation name								
Row Labels	21/09/2013	21/10/2013	21/11/2013	21/12/2013	21/01/2014	21/02/2014	21/03/2014 (b	olank) Grand Total
1	5		2	6	1	3	3	20
2	4	1	3	3	3	4	2	20
3	6				1	1		8
4						1		1
Grand Total	15	1	5	9	5	9	5	49

i. To analyse data further, now select Pivot Table Tools and the Analyze tab.

🚺 🔒 🍤 -	ે - ÷	Excel f	or M&E t	raining workbo	ok studer	nts - Excel		PIVOTTABL	E TOOLS
FILE HOM	IE INSERT	PAGE LAYO	UT F	ORMULAS	DATA	REVIEW	VIEW	ANALYZE	DESIGN
PivotTable Name: PivotTable3 End Options v	Active Field: Date	Drill D Down U	rill -=	→ Group Sel 현음 Ungroup ⑦ Group Fie	ection ld	Insert Insert Slicer Timelir	Filter e Connecti	Refrest	h Change Dat Source •
PivotTable	Acti	ve Field		Group		Fil	ter		Data

j. This gives you a range of tools to help you further customise your Pivot Table e.g. Group fields. In this example we can group dates by Months and / or Quarters.

	А	В	Grouping 8 23	G н	I
1			Auto	-	
2			Starting at: 21/09/2013		
3	Row Labels	Sum of Final assessment			
4	Organisation A	27	✓ Ending at: 22/03/2014		
5	21/09/2013	5	Ву	-	
6	21/10/2013	3	Seconds		
7	21/11/2013	2	Minutes		
8	21/12/2013	4	Days		
9	21/01/2014	4	Months Quarters		
10	21/02/2014	6	Years		
11	21/03/2014	3			
12	Organisation B	9	Number of days: 1		
13	21/11/2013	4		1	
14	21/01/2014	5			
4.5	C		<u> </u>		

Row Labels	 Count of Organisation name
1	20
□ Qtr1	
Jan	1
Feb	3
Mar	3
■ Qtr3	
Sep	5
□ Qtr4	
Nov	2
Dec	6

21) Pivot charts

a. You can also create a PivotChart from the Insert tab

						? 📧	3 — Kate	₽ × White ▼
F_{f_X} Field	ds, Items, &	Sets ▼				+	-	
f _X OLAP Tools -			PivotChart	Recommended	Field	+/-	Field	
¤ Relationships				PivotTables	List	Buttons	Headers	
Calculations			Tools			Show	~	
			PivotChart Insert a PivotChart tied to the data					•
L	М	N	in this Piv					

Row Labels 🔻	Count of Family number	Count of Family number							
Current	20			_					
Inactive	13	Total							
Waiting list	16	25							
Grand Total	49								
		20							
		15							
									otal
		10							
		5	_		_				
		0	Current		Inactive		Waiting list		
			Current		Indulve		waiting list		
		Status 🔻							