



**TERMS OF REFERENCE
FOR THE TRAINING PROVIDER**

PROGRAM TITLE: ADVANCED MICROSOFT EXCEL (VIRTUAL TRAINING)

Background and Motivation

Advanced Excel plays a very important role in structuring and presenting data so that it looks impressive. It provides knowledge on more specialized and advanced capabilities of Excel by automating some common task, applying advance analysis techniques to more complex data sets, collaborating on worksheets with others and sharing the Excel data with other applications.

Objectives

- To gain confidence in efficiently using Excel software at the feature and functionality levels
- To appreciate advanced formulas and functions for advanced calculations
- To learn to create advance reports using Pivot, table, Pivot chart and Analysis Tolls
- To be able to manipulate Excel options to customize their environment to meet varying needs and enhance their productivity
- To explore the magic of analyzing data using Advanced Excel

Scope of Work

The virtual training is to cover the following distinct subject areas:

- Essential components of excel formulas
- Advanced formulas
- Data, Power Query, Table and Formatting
- Perform data security and validation
- Identify and understand how to format financial statements and other excel-based reports more effectively and Create excel-based charts and dashboards to aid in communicating financial data information
- Managing big data in excel
- Data analysis tools using pivot features (Pivot tables & Pivot Reporting)
- Introduction to MACRO

Methodology

Virtual instructor-led training (VILT)

Target Participants and Number of participants

- GSIS Batangas BO employees
- Number of participants: 20-25 pax

Duration and Time

- Duration: 8 hours per day for 2 days
- Time: 8:00am to 5:00pm

Training Provider's Responsibilities

- Customize and submit a proposed program design which includes a training plan
- Prepare Welcome Letter to the participants thru email
- Provide soft copy of materials (training manuals and hand-outs)
- E-Certificate of Attendance
- Training evaluation form

Budget and Payment of Services

Approved Budget for Contract (ABC) of **PhP146,400.00**

Payments shall be made upon Completion. It is understood that all applicable taxes shall be borne by the **Training Provider**.



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Branch Manager