

What Excel skills are required for PHIMS?

PHIMS has the functionality to upload clients and class lists from excel spreadsheets. Standard templates will be used for these loads. The Panorama Project will provide the spreadsheets and train users on the formats and how to enter the data.

However, we expect that many PHIMS users will get data in excel spreadsheets from other sources (e.g. school lists, immunizations provided in acute care homes, etc.) that need to be converted into the standard templates to be uploaded. The list below outlines some of the skills that may be required to move data from external sources into PHIMS compliant spreadsheets.

Clerks or nurses who will use PHIMS to create cohorts for school clinics should come to PHIMS training with these skills.

1. Ability to enter data in a pre-formatted spreadsheet
2. Understand and be able to use cell formats to create standards for dates, numbers (including comma use), alignment and fonts.
 - a. Create formats in new spreadsheets
 - b. Viewing formats in spreadsheets
 - c. Clearing formats
 - d. Change formats in existing spreadsheets
 - e. Creating custom formats for dates or numbers
3. Cut/Copy and Pasting techniques to be able to move large blocks of data from one spreadsheet to another
 - a. Selecting and copying or cutting data using mouse or ranges
 - b. Know the differences between and be able to use paste special data including;
 - i. All
 - ii. Formulas (with or without formats)
 - iii. Values (with number formatting and source formatting)
 - iv. Formats
 - c. Inserting or moving columns
 - d. Hiding/unhiding columns
4. Troubleshooting problems with formats on spreadsheets
 - a. Use Sorting or Filtering to assess data in spreadsheets
 - b. Remove duplicates function