

SELF-ASSESSMENT FORM FOR MICROSOFT EXCEL

General Assessment		
Name	Phone	Mail Stop
Department	Supervisor	
Job Function		
Do you download data from our administrative systems into an Excel or Word document (for example, from FMS, PPMS, or SMS)? <input type="checkbox"/> Yes <input type="checkbox"/> No 		
If Yes, what system(s) do you access for downloading?		
Do you currently use Excel to perform work-related tasks? <input type="checkbox"/> Yes --Please continue to respond to items on the form, as appropriate. <input type="checkbox"/> No --Please answer question a and return the form as directed.		
a. What job function(s) do you think you could improve if you knew more about Excel? <div style="height: 40px; border: 1px solid black; margin-top: 5px;"></div>		
b. How long have you been using Excel? c. How often do you use Excel (for example., daily, weekly, infrequently)? d. Describe the kind of data you work with in Excel. <div style="height: 60px; border: 1px solid black; margin-top: 5px;"></div>		

Continue to the next page for the Self-Assessment of Excel Mastery →

Self-Assessment of Excel Mastery			
A. Typical User: One who makes changes to or enhances spreadsheets.			
For each of the following Excel functions/features, indicate your level of familiarity.	Familiar enough to use feature	Unfamiliar with feature	Would like training
How to enter labels and values (numeric data) and the differences between them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the keyboard, mouse, and shortcut keys to navigate the worksheet without altering spreadsheet contents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using math operators such as +, -, / and *.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use SUM, COUNT, COUNTA, AVERAGE, MAX, and MIN functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Autosum feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using absolute cell references .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit spreadsheets by copying or cutting and pasting .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View large spreadsheets using Freeze panes and/or Split .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format spreadsheets by changing fonts, font sizes and font styles, and font colors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand date/time formatting and serial dates .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format spreadsheets by adding/deleting rows, columns, and ranges.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changing column widths and/or row heights .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format spreadsheets by changing number formats such as decimal places and percentages.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format spreadsheets by using borders and shading .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use multiple sheets in a workbook (rename tabs and copy, delete and move worksheets)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change print settings (portrait/landscape, margins, print selection, repeat column/row headings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Sort feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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B. Typical User: One who manipulates data in spreadsheets.

For each of the following Excel functions/features, please indicate your level of familiarity.	Familiar enough to use feature	Unfamiliar with feature	Would like training
Create formulas that refer to data in another worksheet and/or workbook.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create and use named ranges in formulas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using IF function.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Date and Time functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using Lookup functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Subtotal feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Group and Outline features to summarize data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the CONCATENATE function.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Text to Columns feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View data by using Autofilter .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View data by using Advanced filters .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add, delete, and print Comments .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use conditional formatting .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. Typical User: One who is familiar with features listed in A and B and who manipulates data and may need knowledge of specialized features.

For each of the following Excel functions/features, please indicate your level of familiarity.	Familiar enough to use feature	Unfamiliar with feature	Would like training
Create, modify, and print charts .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use graphic objects to enhance the worksheet.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Excel data in mail merge operations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Excel templates .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Excel templates .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Export Excel data to Word, Access, and Powerpoint.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

D. Typical User: One who is familiar with features listed in A and B, needs to perform “what if” analysis, and needs to display multiple views of data.

For each of the following Excel functions/features, please indicate your level of familiarity.	Familiar enough to use feature	Unfamiliar with feature	Would like training
Use the Goal Seeking feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View data through the use of Pivot tables .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What kind of training schedule and format works best for you? Check all that apply.

When: ☐ Morning ☐ Afternoon ☐ Evening ☐ No preference
 How long: ☐ 2-Hr Block ☐ 4-Hr Block ☐ No Preference
 Method of Instruction: ☐ Self-paced ☐ Instructor-led ☐ No Preference

Additional comments:

Delivery Instructions:

E-mail assessment to <enter name> at <enter email address> or send to <enter name> at <enter mail stop>.