

## 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)? <span style="float: right;"> <input type="checkbox"/> Yes  <input type="checkbox"/> No           </span>		
If Yes, what system(s) do you access for downloading?		
Do you currently use Excel to perform work-related tasks? <input type="checkbox"/> <b>Yes</b> --Please continue to respond to items on the form, as appropriate. <input type="checkbox"/> <b>No</b> --Please answer <b>question a</b> and return the form as directed.		
<b>a. What job function(s) do you think you could improve if you knew more about Excel?</b>  <div style="border: 1px solid black; height: 40px; width: 100%;"></div>		
<b>b. How long have you been using Excel?</b>  <b>c. How often do you use Excel (for example., daily, weekly, infrequently)?</b>  <b>d. Describe the kind of data you work with in Excel.</b>  <div style="border: 1px solid black; height: 80px; width: 100%;"></div>		

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

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

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<b>B. Typical User: One who manipulates data in spreadsheets.</b>			
<b>For each of the following Excel functions/features, please indicate your level of familiarity.</b>	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 <b>named ranges</b> in formulas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using <b>IF</b> function.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the <b>Date and Time</b> functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using <b>Lookup</b> functions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the <b>Subtotal</b> 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 <b>CONCATENATE</b> function.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the <b>Text to Columns</b> feature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View data by using <b>Autofilter</b> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View data by using <b>Advanced filters</b> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add, delete, and print <b>Comments</b> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use <b>conditional formatting</b> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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