

# Instructions for Self-Assessment Form for Microsoft Excel

## Purpose

The Self-Assessment Form for Microsoft Excel was created to be used by the colleges as a Microsoft Excel skills assessment tool.

Not all employees who access the information system will need Excel skills, since some reports will be pre-formatted. Therefore, supervisors may want to review each employee's self-assessment as it pertains to employee responsibilities and priorities.

This form is intended as an example and "jumping off point." It is not intended to be exhaustive in terms of all Excel features, but rather to provide examples of Excel features one might use based on job requirements. You are encouraged to customize this form to meet your employee training needs. Information on how to do so is provided below under Modifying the Form.

The assessment includes four sub-forms, A, B, C and D, each designed to be used by employees with progressively greater Excel knowledge, from entering or changing data in spreadsheets to using specialized and advanced features.

Employees can be directed to save their forms using their names as filenames and return the forms via e-mail or on-campus mail.

## Modifying the Form

The assessment form is a "fill-in-the-blank" document. Users can enter information into the open fields but cannot change the rest of the information. To customize the form for your college, perform the following steps:

1. In Microsoft Word, open the file and click View, Toolbars, Forms.
2. To open up the form for editing, click the Protect Form icon (it looks like a lock).
3. Change the form as needed.
  - To add a new text field, click the Text Form Field icon (the first icon on the Forms toolbar).
  - To add a new checkbox, click the Check Box Form Field icon (the second icon on the Forms toolbar).
4. When you are done making changes, click the Protect Form icon again.
5. Save the form.

## Using the Form

When you open the form, the cursor will be located on the first fill-in field. Type information into the field and press the Tab key to jump to the next field. Continue in this manner until you have filled in all the fields, skipping any fields or sections that do not apply. As you type, the fields will automatically expand to allow you to type as much as you need.

To mark a checkbox with an “x,” click the checkbox or press your spacebar. To remove an “x,” click the checkbox again or press the spacebar again.