

Company Name Pre-Training Assessment	Microsoft Excel
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Name: **Job Title:**
Dept: **Tel:** **Date:**

To help you increase your skills through effective training, please help us ensure your needs are met by completing the form below. Use the tab key to move around the form, type in your details in the top section, then use the mouse or spacebar to place a check mark in the appropriate box, Yes, No or N/A (not applicable) for the questions. The end of the form is free text for your comments.

	Yes	No	N/A
1. Have you used a spreadsheet application before? If yes which version?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Formatting: Are you able to format a spreadsheet in the following ways?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Apply number/currency formatting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Change fonts, alignment, borders and fills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Change row heights and column widths	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Create custom and conditional formats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Calculations: Can you use formulae and functions including:			
• Autosum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Add, subtract, multiply, divide, percentages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Autofill to copy formulae	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Basic functions such as average, max, min, count	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Relative and absolute addresses (dollar signs) in formulae	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Function wizard for advanced functions (eg. If, and, lookups, text functions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Please specify if there is a particular category of functions you need to use:			
4. Charts: Can you:			
• Create a chart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Format and change a chart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Linking: Can you create links so if the source data changes the destination data updates			
• Links between different sheets of the same workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Links between different workbooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Links to Microsoft Word or PowerPoint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Lists and Databases: Can you use Excel's list features			
• Filters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Sort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Advanced filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Large Worksheets and Analysis: Can you summarise and manipulate large volumes of data			
• Freeze panes and split screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Print titles on every page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Grouping and Outlining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Pivot Tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Subtotals and Consolidation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Formula auditing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No	N/A
8. Working in Teams: Can you use the following features <ul style="list-style-type: none"> Track changes and comments Protect and share workbooks Data validation Create templates Create advanced templates and use the template wizard 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Advanced Tools: Can you use the following features <ul style="list-style-type: none"> Scenario manager Solver Goal Seek External data and web query 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Macros: <ul style="list-style-type: none"> Can you record a simple macro for automation and commonly used routines? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Visual Basic: <ul style="list-style-type: none"> Can you extend macros to include writing code for user defined functions and routines using visual basic? 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. What level of understanding do you need to achieve? <ul style="list-style-type: none"> Basic – creating and formatting simple spreadsheets Intermediate – Using enhanced features such as charts, lists, linking Advanced – enhanced techniques of manipulating data and speeding up processes Visual Basic – to develop Excel further Support – for IT Professionals 	<input type="checkbox"/>	<input type="checkbox"/>	

Please use the space below and over the page to let us know any other details, such as features you currently use in your job or any special requirements for training that you may have: