

## EXCEL – CHECK YOUR OFFICE SKILLS

<b>Company</b>		<b>Name</b>	
<b>Dept.</b>		<b>Tel</b>	

Functionality	Need :
<p><b><u>Basics</u></b></p> <p><i>Standard tables</i> : simple structure but neat presentation, including some very easy calculations (sum, subtract ...) and printed on one page.</p> <p><i>Create more sophisticated tables</i> : large and/or long where scrolling is done over more than one screen, with special dates or number formats, including more calculations and printed on more than one page.</p>	<p>Mastered</p> <p>Learn</p> <p>Refresh</p> <p>No need</p>
<p><b><u>Formulas and Introduction to functions</u></b></p> <p>Use mathematical formulas : the usual adding, subtracting, dividing operations, percentage calculations and so on. Recopy the formulas without getting an error value (the \$ signs added to a ref). Use easy functions such as SUM, AVERAGE, MIN, MAX, COUNT, COUNTIF, SUMIF ...)</p>	<p>Mastered</p> <p>Learn</p> <p>Refresh</p> <p>No need</p>
<p><b><u>Advanced Functions</u></b></p> <p>They will help you to generate a result depending on one or more conditions (IF function), to retrieve specific data from a list of records (the famous VLOOKUP function), to round up or down a given result (for instance up or down to 5 centimes) etc ...</p> <p>Use dates in functions Use conditional formats (linked to functions) Protect some formulas</p>	<p>Mastered</p> <p>Learn</p> <p>Refresh</p> <p>No need</p>
<p><b><u>Lists of data</u></b></p> <p>A <i>list</i> can be a list of clients, of providers, various results ... that are regularly updated.</p> <p>Organize the records to create a "real" list that Excel can manage Define the list as a <i>table</i>. Sort and Filtre (simple and advanced). Synthesize the list with calculations such as subtotals or "pivot" tables (sales by region and branch for instance).</p>	<p>Mastered</p> <p>Learn</p> <p>Refresh</p> <p>No need</p>
<p><b><u>Pivot tables and search functions</u></b></p> <p>Create pivot tables from a <i>list</i> of records or a <i>table</i> Search the list in order to extract specific data using functions such as the VLOOKUP function.</p>	<p>Mastered</p> <p>Learn</p> <p>Refresh</p> <p>No need</p>

Functionality	Need :
<p><b><u>Charts and graphic objects</u></b>  <b>You need to build charts on your existing data.</b> How to create and manage current charts such as charts in columns, bars or pie charts or more specific types such as radars (which look like cobwebs)</p>	Mastered Learn Refresh No need
<p><b><u>Projections and simulations</u></b>            Working with projections : projecting figures, simulating different possible scenarios ... (all the functionalities built on "and what if" questions - changing a result if one or more variables are modified)</p>	Mastered Learn Refresh No need
<p><b><u>Templates and Forms</u></b>            Create templates to retrieve a specific content to fill in information such as an invoice or purchase order, an expense report ... The template includes pre-set formulas, tooltips to help the user fill in the required data, simple macros and protected cells.             Add form fields such as check boxes, radio buttons, drop-down lists ...</p>	Mastered Learn Refresh No need
<p><b><u>Managing a project</u></b>  <i>For users that don't want or can't use Project</i>            Use Excel to manage a small project            Create a timeline or a planning : automated dates (typing and formatting)            Create a dashboard : conditional formats, simple macros, RPT function ...</p>	Mastered Learn Refresh No need
<p><b><u>Tips and Tricks / Custom</u></b>            Functionalities often ignored by users or not fully mastered (keyboard shortcuts, number formats, conditional formats, protection ...             Special functionalities such as consolidating data, INDEX function ...</p>	Mastered Learn Refresh No need

Any other special needs ?

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