

EXCEL – CHECK YOUR OFFICE SKILLS

Company		Name	
Dept.		Tel	

Functionality	Need :
<p><u>Basics</u></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><u>Formulas and Introduction to functions</u></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><u>Advanced Functions</u></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><u>Lists of data</u></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><u>Pivot tables and search functions</u></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><u>Charts and graphic objects</u> You need to build charts on your existing data. 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><u>Projections and simulations</u> 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><u>Templates and Forms</u> 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><u>Managing a project</u> <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><u>Tips and Tricks / Custom</u> 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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