# Training Needs Analysis for Microsoft Excel

## Name:

## Which version of Excel do you require training in?

**Address of proposed training:**

| Topic | Sub topic | Competent | Need refreshing | No Knowledge |
| --- | --- | --- | --- | --- |
| Formatting | | | | |
|  | Bold, underline, italics |  |  |  |
|  | Shading, borders |  |  |  |
|  | Changing alignment of text |  |  |  |
|  | Can you make cells change colour depending on the data? (conditional formatting) |  |  |  |
|  | Could you type the following H2O, m2 , Cotê du Rhonê, Reneé |  |  |  |
|  | Can you merge cells together and rotate text? |  |  |  |
|  | Can you automatically add the remaining months of the year, if you just type in January? (autofill button) |  |  |  |
|  | Can you automatically get the system to fill in dates based on a timespan you specify eg weekly? (autofill button) |  |  |  |
|  | Can you use Flash Fill? |  |  |  |
| Formulas | | | | |
|  | Can you use the Autosum button? |  |  |  |
|  | Can you use the Autosum button when there are no numbers of the screen? |  |  |  |
|  | Do you recognise and could you use these symbols + - / \*? |  |  |  |
|  | Do you know when to use brackets () to create your own formulas? |  |  |  |
|  | Do you know when and how to use $ in a formulas? (Absolute referencing) |  |  |  |
|  | Can you copy formulas or functions using the autofill button? |  |  |  |
|  | Can you use the following functions? |  |  |  |
|  | Max |  |  |  |
|  | Min |  |  |  |
|  | Average |  |  |  |
|  | Count |  |  |  |
|  | Counta |  |  |  |
|  | Countifs |  |  |  |
|  | If |  |  |  |
|  | Vlookup |  |  |  |
|  | hlookup |  |  |  |
|  | Iserror |  |  |  |
|  | Sumifs |  |  |  |
|  | AND |  |  |  |
|  | Or |  |  |  |
|  | PMt, Cumipmt, FV |  |  |  |
|  | ceiling, Floor, round, roundup, rounddown |  |  |  |
|  | Datedif, isodd, |  |  |  |
|  | Have you named cells and used these names in formulas? |  |  |  |
| Working with Workbooks and worksheets and data | | | | |
|  | Can you link worksheets together? |  |  |  |
|  | Can you link workbooks together? |  |  |  |
|  | Have you used the consolidate feature? |  |  |  |
|  | Do you know how to enter data on multiple sheets at the same time? |  |  |  |
|  | Can you hide columns and rows of data? |  |  |  |
|  | Do you know how to split your screen into 2 or 4 segments? (split screen) |  |  |  |
|  | Do you know how to view two or more pages of the same workbook on the screen at the same time? |  |  |  |
|  | Do you know how to view two or more workbooks on the screen at the same time? |  |  |  |
|  | Do you know how to add headers and /or footers in your spreadsheets? |  |  |  |
|  | Can you print a large document over 4 pages for example with all the headings appearing on every page? |  |  |  |
|  | Can you add and delete page breaks? |  |  |  |
|  | Can you add comments to spreadsheets? Eg: notes in a cell explaining the data that was input? |  |  |  |
|  | D o you know how to search for data using drop down arrows at the top of columns? (autofilter) |  |  |  |
|  | Have you used the advanced filter feature? |  |  |  |
|  | Can you sort data? |  |  |  |
|  | Have you used the outlining feature? |  |  |  |
|  | Have you used the subtotals feature? |  |  |  |
|  | Can you create charts? |  |  |  |
|  | Can you format charts with different colours, pictures, 3D, change the axis etc? |  |  |  |
| Protecting spreadsheets | | | | |
|  | Have you used the validation feature to restrict data entry? |  |  |  |
|  | Can you protect cells? |  |  |  |
|  | Can you protect workbooks? |  |  |  |
| Data Analysis Tools | | | | |
|  | Can you use the Table Feature? |  |  |  |
|  | Have you used Goal Seek? |  |  |  |
|  | Can you create scenarios within the same workbook to make projections? |  |  |  |
|  | Have you used the Solver Feature? |  |  |  |
|  | Have you used Data Tables |  |  |  |
| Pivot Tables and Power BI | |  |  |  |
|  | Can you create Pivot Tables? |  |  |  |
|  | Can you use Slicers and Timelines? |  |  |  |
|  | Can you apply different calculation to a Pivot Table? |  |  |  |
|  | Do you understand all the options on the Pivot Table ribbons? |  |  |  |
|  | Can you create custom groups? |  |  |  |
|  | Can you use the data model? |  |  |  |
|  | Can you create calculated fields and items? |  |  |  |
|  | Can you create Pivot Table charts? |  |  |  |
|  | Can you use Power Query? |  |  |  |
|  | Can you use Power Pivot? |  |  |  |
|  | Can you use Power Map? |  |  |  |
| Miscellaneous | | | | |
|  | Can you create macros to automate work using the macro recorder button? |  |  |  |
|  | Can you open the personal macro workbook to edit VBA? |  |  |  |
|  | Can you modify the Quick Access Toolbar or add extra/modify ribbons |  |  |  |
| Comments | |  |  |  |
|  | Please enter any other comments you think would be useful in assessing your training needs. For example the nature of the spreadsheets you are required to create or specific areas you want to cover. |  |  |  |

Please email this completed form to [info@grapevinecomputing.co.uk](mailto:info@grapevinecomputing.co.uk) in order that a suitable course can be recommended or designed specifically for your needs.