

# Training Needs Analysis Form



## Introduction to Microsoft Excel 2003/2007

**Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Not Sure
Start Microsoft Excel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify parts of the Excel screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Navigate spreadsheets with the keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Select cells with the keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open an existing workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit cells	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add new worksheets to a workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a new workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a new workbook from a Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save a workbook to a folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open and close a workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insert different data types into cells (text, numbers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a basic spreadsheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fill cells (eg: months of the year, days of the week)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format cells – shading, borders, fonts etc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format numbers – dates, currency etc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand formulas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand BODMAS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create simple formulas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas using functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit/copy a formula	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insert &/or delete columns and rows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a chart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change the chart type & format a chart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with Sheets (eg: rename, move, copy sheets)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work in Group mode with multiple sheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change page setup effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Troubleshoot printing large workbooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sort Data in columns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Help system in Excel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Training Needs Analysis Form



## Intermediate Microsoft Excel 2003/2007

**Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Not Sure
Create Spreadsheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use AutoFill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a Custom List for AutoFill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create formulas with functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with multiple sheets in a workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insert a cell comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View, edit, delete & print cell comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand relative, mixed & absolute references	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name a cell or range of cells	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use more complex functions (eg: text, logical etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Paste Special to remove formulas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Paste Special to Transpose data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Conditional Formatting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create links between sheets in same workbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create links between different workbooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Freeze columns &/or rows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perform a single column sort in a list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set up a primary & secondary sort order in a list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use AutoFilter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtotal a list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Outline bar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create more complex charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Troubleshoot page setup & printing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Split data into columns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Format Painter effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Training Needs Analysis Form



## Advanced Microsoft Excel 2003/2007

**Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Not Sure
Perform calculations involving multiple sheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create and manage named ranges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with more complex functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nest several functions in one formula	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a Custom Sort Order in a list/database	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Advanced Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apply subtotals to a list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a Pivot table Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit & format a Pivot table Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create & edit a Pivot Chart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand Data Validation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apply different Data Validation rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Data Validation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create an Error Messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create an Input Message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy Data Validation settings to other cells	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Go To Special to select data types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand Data Consolidation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consolidate data from different worksheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consolidate data from different workbooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Link data between workbooks and applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Goal Seek	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create and manage scenarios	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create & edit a template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protect cells, worksheets, workbooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hide data in a workbook (rows, columns sheets etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save a workbook as a html file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand data tables			
Create & use a one or two variable data table	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand Macros			
Record & edit a Macro			
Assign a Macro to the desired location			

# Training Needs Analysis Form



## Introduction to Visual Basic for Microsoft Excel 2003/2007

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Organisation: \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Don't know
Record, run, test, assign & edit a macro	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a recorded application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create & use a User Defined function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create & modify a function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pass multiple arguments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a function library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with the VB editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with the Project Explorer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Work Area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with a Code Module	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Run a Procedure from the Editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set Break Points in the Editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Step through a Procedure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Immediate window	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with Object Collections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set Property Values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with worksheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Object Browser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programme with the Object Browser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand Procedures			
Create a Command Procedure			
Understand IntelliSense			
Use the Edit Toolbar			
Comment Statements			
Create & use Variables			
Use Implicit & Explicit Declarations			
Procedure & Module level Scoping			
Public Scoping of Variables			
Pass Variables by Reference & Value			
Use Arrays & Excel Objects			
Use workbook & worksheet objects			
Use range objects			
Use objects in a procedure			
Understand programming conventions			
Prompt user input			

# Training Needs Analysis Form



Task	Yes	No	Don't know
Use the input method			
Use IF to make decisions			
Test for multiple conditions			
Loop for fixed, specified & unknown times			
Create, initialise, run & update a custom form			
Change form properties			
Add different controls to a form			
Create error checking procedures			
Run a form from a procedure			
Understand Automatic Start-up			
Programme automatic events			
Run automatic procedures			