

Your Name:	Date:
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I create/setup my own files in Excel
Most of the time I work on files created by other people
This is how I rank my current Excel knowledge
I would like to learn more about Excel
There are specific features in Excel that I would like to learn (please list features)

Rank your knowledge of each section.

- 1**= I have never used the items in this section.
- 2** = I have tried one or more items in section.
- 3** = I feel reasonably comfortable with most items in section.
- 4** = I am very confident with most or all items in section.
- L** = I would like to learn items in section (or more about them).

Level 1 Topics					
1	2	3	4	L	Section
					Getting Started with Excel Workbooks vs sheets Customize the Quick Access Toolbar Using the Ribbon
					Entering Text, Numbers & Formulas Rules for entering data Deleting and Editing cell entries Moving around a worksheet Selecting cells (shortcuts) What is Quick Analysis (2013/2016) Using Clear, Undo and Redo
					Formulas & SUM/AVERAGE Entering a basic formula Operators & order of operations Using Sum & Average
					Using Number Formats Choosing number formats Date formats & custom date formats How Excel stores dates The Today and Now functions Decimal places & negative values
					Cell Alignment Options Left, center and right Vertical cell alignment Centering a heading Wrapping / Rotating text / Indenting
					Columns & Rows Column widths & row heights Hiding and unhiding Inserting and deleting

Level 1 Topics					
1	2	3	4	L	Section
					Cut, Copy, Paste and Paste Special Drag & Drop to move or copy Cut, Copy, & Paste Using Paste Special
					Using Fill Automate entering months, days, a series of numbers, and more Using Fill to copy formulas Fill options / Fill tricks Using Flash Fill (2013/2016)
					Fonts, Borders & Cell Colour Changing fonts and sizes Bold, italic, underline Font colour & cell colour Applying borders
					Databases - Quick Overview Understanding/setting up a database A quick look at sorting & filtering
					Files Saving & opening & closing files Working with multiple files open Creating new files
					Page Layout & Printing Portrait & landscape, Scaling, Paper size, Margins, Centre on page Print preview and Printing
					Other Topics Using the zoom bar & dialog box Using AutoCorrect Using Find and Replace

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Level 2 Topics					
1	2	3	4	L	Section
					Setting up a Database Proper database design The current region
					Sorting Multiple level sorting Sort options Sort warning Custom sorts & custom lists for Fill Sorting by colour/icon Back to original sort order
					Filtering With AutoFilter Activating filter Using the search box / check marks Entering custom criteria Understanding arguments And vs. Or Filter on cell values Formulas with filters Reapplying a filter Clearing filters Using the Subtotal function Using data forms Saving filters (see Custom Views)
					Split & Freeze Splitting the screen into 2 or 4 panes View widely separated areas simultaneously Freezing panes to lock headings Removing a split or freeze
					Conditional Formatting Highlight cell rules Top/bottom rules Data bars, color scales, icon sets Using Quick Analysis (2013/2016) Pre-set and custom formats A trick for finding duplicates Using formulas in rules More rules / new rules Using manage rules Clearing rules
					Multiple Sheets Navigating from sheet to sheet Sizing sheet display area Adding, deleting, renaming sheets Setting sheet tab colour Moving and copying sheets

Level 2 Topics					
1	2	3	4	L	Section
					More About Multiple Sheets Hiding & unhiding sheets Setting defaults for all sheets Setting default number of sheets Sheet background picture Protecting a Workbook
					Multiple Windows Creating & switching windows View multiple sheets/multiple files Arranging together on the screen Hiding windows Closing all windows Save Workspace (2007/2010)
					Creating Custom Views Saving multiple print settings Saving multiple filters Saving other settings
					Advanced Page Setup & Printing Normal, layout and page break views Headers & footers and print titles The Page Setup options Using page breaks
					Charts Create column, bar, line & pie charts Instant charts Quick analysis charts (2013/2016) Recommend charts (2013/2016) Unlinking a chart (make it static) Selecting, moving & sizing charts Changing the chart type Transposing the data Change data ranges Chart titles & data labels Using the chart buttons (2013/2016) Printing charts Quick chart layouts & chart styles Colour schemes (2013/2016) Selecting, moving & sizing elements Formatting chart elements
					Other Topics Using format painter to copy formats Customize the Ribbon (2010-2016) Customize the Quick Access Toolbar

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Level 3A Topics					
1	2	3	4	L	Section
					Formulas Basics Creating a Basic Formula Copying and Filling Formulas Order of Calculation
					Using Functions Using Sum & Average Using AutoSum Quick Analysis Totals (2013/2016) Using Insert Function The Function icons Understanding Function Syntax
					Absolute Formulas Relative vs Absolute Full & Partial Absolute Formulas
					Range Names in Formulas Why use a range name Range name rules Different ways to create range names Using Range Names in new and existing formulas
					A Quick Look at These Functions Count / CountA / CountBlank Max / Min / Average Round / RoundUp / RoundDown SumIf Left / Mid / Right / Search Lower / Upper / Proper Value / NumberValue (2013/2016) Trim / Len
					Entering and Formatting Dates Entering dates and times properly How Excel interprets dates & times Formatting – pre-set and custom Formulas to calculate dates or times
					Date and Time Functions Today / Now Day / Month / Year / Weekday / Date NetworkDays / Workday Value with dates Days (2013/2016)
					The IF Function Quick overview Rules and conditions True and false Using Data Validation

Level 3A Topics					
1	2	3	4	L	Section
					More about the IF Function Ifs without IF Nesting IF's Closing brackets Multiple conditions with AND/OR
					The VLOOKUP Function Quick overview Creating a lookup table Using VLookup with that table Numbers outside the range Using IF and OR with VLookup Using IFNA with VLookup (2013/2016) Using Data Validation with VLookup Vlookup vs. HLookup
					More About Formulas Using Transpose to flip data Tips for editing formulas Displaying formulas (sheet or cells) Reference a single cell in a formula Concatenating formulas Converting formulas to values Splitting one column into several Flash Fill to split data (2013/2016) Using manual calculation Protecting formulas
					Multiple Sheet/File Formulas Formulas that Reference Other Sheets Formulas that Reference Other Files
					Mapping Formulas with Auditing Tracing formulas Tracing dependents and precedents Step into a formula Error checking The watch window
					Text with Values Showing text with a value Performing calculations
					Trouble Shooting – Error Messages in Formulas How to fix errors Error indicators

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Level 3B Topics					
1	2	3	4	L	Section
					Create and Format a Table Why use a table How to create a table Using table tools Filtering & Sorting with Tables Using Slicers (2013/2016) Displaying Totals Design Your Own Table Style
					Advanced Filter AutoFilter vs. Advanced Filter The three ranges Entering simple criteria Entering formula-based criteria Performing a filter Using OR conditions Using range names Copy unique records Using Subtotal, Sumif/ifs, Averageif/ifs and Countif/ifs Finding and removing duplicate records
					Group, Outline & Subtotals Grouping rows/columns Showing/hiding details in an outline Display/hide outline symbols Creating Groups Adding automatic subtotals Adding other automatic analysis (Average, Count, etc.) Removing subtotals
					Basic Pivot Tables Creating a pivot table Recommended pivot tables Adding columns, rows & filters Moving & removing fields Adding multiple fields in an area Hiding/showing data Accessing tools and options Refreshing data Using value field settings Using and creating styles

Level 3B Topics					
1	2	3	4	L	Section
					Advanced Pivot Tables Creating and working with groups Adding a timeline (2013/2016) Collapse and expand fields Changing report layout Using subtotals and grandtotals Using calculated fields Using calculated items Listing formulas used Creating drill-downs Creating report filter pages Filtering pivot table fields Using slicers (2010/2013/2016) Setting pivot table options Multiple consolidation ranges Creating pivot charts
					Importing Data From another spreadsheet Paste link Insert object
					Get External Data Importing from Access Importing text files Importing from web Working with connections Open external files

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OTHER Topics					
1	2	3	4	L	Section
					Cell Comments Attaching Comments to Cells Editing, Deleting & Printing Comments Moving & Sizing Comments Setting Comment Options
					Cell Styles Using Styles to Speed Repetitive Formatting Creating and Editing Cell Styles Using Cell Styles in Other Workbooks
					Drawing Tools Lines, Arrows, Freehand Boxes, Circles, Arcs Text Boxes Group, Ungroup, Order Colours and Shadows Moving, Sizing, Formatting Objects Add Pictures and Clip Art SmartArt Graphics Adding ScreenShots
					Passwords & Protecting Protecting WorkSheets Unprotecting Specific Cells Protecting Workbooks Password Protect Files Password to Modify (Make Read Only)
					Goal Seek Have Excel Change Cell Value To Arrive At Desired Result
					Formulas That Cannot Be Edited Creating Array Formulas Editing Array Formulas
					Templates Using an Existing File as a Template Creating a Template Using In a New File Templates and Inserting Sheets Auto templates for default Books or Sheets

OTHER Topics					
1	2	3	4	L	Section
					Forms Form Templates Designing the Form Tools-Combo Boxes, List Boxes, etc. Control Properties Protecting the Form
					Sharing Workbooks & Tracking Changes Sharing workbooks on a network Multiple users in the same file Controlling which changes are saved
					Data Consolidation Consolidate Multiple Worksheets Consolidate by Position/Category Consolidate from Other Workbooks
					Scenarios Creating and Saving the Scenario Displaying Scenarios Other Scenario Options-Edit, Merge, Summary, etc.
					Data Tables Creating Substitute Consecutive Values in a Formula
					Solver Setting Objective/Target Specifying Variable Cells Specifying Constraints
					A Brief Introduction to Macros What is a Macro? Relative Referencing
					More About Recording Macros Macro Options Storing/Editing/Debugging Macros Step Into, Step Over, Step Out Run To Cursor Seven Ways To Run A Macro; Adding To Toolbars, Creating Buttons, Etc.
					Using Visual Basic (basics)
					Version 2013/2016 Power Pivot Power Query Power View Creating Forecast sheets (2016)

Based on the content listed in the five sections on the previous pages, the course(s) that would be of most benefit to me in my job are (ranked in order if more than one):

Level 1	Level 2	Level 3A	Level 3B	OTHER Topics

General Comments



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