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# MICROSOFT EXCEL

## SKILLS CHECKLIST

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As you acquire and master a skill, check off the box next to it.

<b>BEGINNER SKILLS</b>	
<input type="checkbox"/>	Create a new blank workbook
<input type="checkbox"/>	Save the workbook with a filename
<input type="checkbox"/>	Save As the workbook with another format
<b>Enter Cell Values and Labels</b>	
<input type="checkbox"/>	Enter a cell value
<input type="checkbox"/>	Enter a cell value with Autofill
<input type="checkbox"/>	Edit, Clear, Copy cell contents
<input type="checkbox"/>	Insert and Delete cell contents
<input type="checkbox"/>	Find and Replace cell contents
<input type="checkbox"/>	Use Autocorrect to correct cell contents
<b>Modify a Worksheet</b>	
<input type="checkbox"/>	Move and Copy multiple cells
<input type="checkbox"/>	Specify and Use ranges
<b>Use Formulas</b>	
<input type="checkbox"/>	Enter a formula in a cell
<input type="checkbox"/>	Edit, Move, or copy a formula
<input type="checkbox"/>	Use an absolute cell reference
<input type="checkbox"/>	Use a mixed absolute and relative cell
<input type="checkbox"/>	Name a cell or range
<input type="checkbox"/>	Correct a calculation or formula error
<b>Use a Function</b>	
<input type="checkbox"/>	Enter a function
<input type="checkbox"/>	Use the AUTOSUM function
<input type="checkbox"/>	Use the COUNT, MAX, MIN, Average functions
<b>Modify Page Layout</b>	
<input type="checkbox"/>	Format numbers and text
<input type="checkbox"/>	Format rows and columns
<input type="checkbox"/>	Use Format Painter and Auto Format
<b>Printing and Publishing Documents</b>	
<input type="checkbox"/>	Prepare worksheet for printing
<input type="checkbox"/>	Preview using Page Layout view
<input type="checkbox"/>	Print selections, multiple copies
<input type="checkbox"/>	Select printer and print options
<input type="checkbox"/>	Publish a worksheet by email
<input type="checkbox"/>	Save a worksheet as a PDF file

<b>Create a Chart</b>	
<input type="checkbox"/>	Create a simple chart from worksheet data
<input type="checkbox"/>	Customize the chart type
<input type="checkbox"/>	Edit chart titles

*This checklist is intended as a personalized reference guide for your professional development. It is not intended to be a part of the performance review process.*

Created: March 2015, CSUDH Division of Information Technology  
Updated: 7/13/2020

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## SKILLS CHECKLIST

### INTERMEDIATE SKILLS

#### Maintain a Large Worksheet

Split window horizontally/vertically

Freeze/unfreeze headings

Add, name, order worksheets

Use date in a formula

#### Work with Multiple Worksheets

Navigate among sheets in a workbook

Edit cell in two worksheets at a time

Add, name and order worksheets

Open, arrange multiple windows in a worksheet

View two worksheets side by side

Move or copy a worksheet to another workbook

Create a link between two workbooks

Create a summary worksheet that recaps

#### Work with Data

Group/ungroup data

Import data from another database to worksheet

Add hyperlink to another document in worksheet

#### Advanced Chart Skills

Create a new chart (full range of chart options)

Move or resize an existing chart in a worksheet

Use Design Tab to customize type and style

Use Layout Tab to customize chart elements

Edit chart titles

Format chart elements (titles, categories, values)

Add graphic image and textbox to a worksheet

Add clip art and WordArt to a worksheet

Add a SmartArt object to a worksheet

Use Sparkline formatting in a worksheet

#### Work with Data Lists

Create a list

Add records using a data form

Edit and find records using a data form

Sort records on single and multiple fields

Use AutoFilter to hide records

Create a custom filter for a list

Delete a comment from a document

### Document and Audit a Worksheet

Add, review, edit and print comments

Use Watch Window to find errors in a worksheet

Use Auditing feature to find errors in a worksheet

#### Printing Options

Specify margins, orientation, etc. on Page Setup

Preview page breaks

Print formulas only

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### ADVANCED SKILLS

#### Using Advanced Functions

- Define a named cell or range
- Use a named range in a formula
- Use Insert Function to create a new function
- Use Function Library to create a new function
- Use a conditional (IF) function
- Create a nested condition formula
- Use Date and Time functions
- Use Logical, Financial, Math, Statistical functions
- Use Information functions
- Use the HLOOKUP and VLOOKUP functions

#### Manage Data

- Create a drop-down list to facilitate data entry
- Add data validation to a worksheet
- Create a group or outline of data in a worksheet
- Ungroup or clear a group
- Convert text to columns in a worksheet
- Add Password protection to a worksheet
- Add Password protection to a workbook
- Lock and unlock a worksheet cell

#### Conditional Formatting

- Use conditional formatting to format a cell
- Create a new conditional formatting rule
- Clear conditional formatting from a cell
- Create Sparkline formatting
- View and apply a theme to a cell

#### Work with Pivot Tables and Pivot Charts

- Create a Pivot Table
- Modify, format or delete a Pivot Table
- Create a PivotChart Report
- Modify a PivotChart Report
- Sort and filter PivotTable data
- Create a Slicer to filter data in a PivotTable

#### Use Analytical Add-ins

- Install an Add-in for Excel
- View and manage Add-ins for Excel
- Use GoalSeek to ask "What-if" question

- Use Data Analysis
- Use Scenario Manager
- Produce a summary report showing scenarios
- Use Solver to conduct analysis

#### Macros and VBA Editing

- Create and modify a macro command
- Assign a macro to a toolbar
- Save a Workbook with macros
- Debug a macro using step mode
- Use the VBA editor to modify a macro

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