

# *Skills Questionnaire*

Windows & Software Configuration

Common Software Skills

Word

Excel

File Management

Outlook

This skills questionnaire is provided without obligation so you can assess the benefits of receiving training.

Most people associate training with the obvious task of learning how to carry out new functions. However, one of the most overlooked areas of training, that can result in immediate and continuing improvements in productivity, is *learning a better way to do what you already do*.

New functions learned are often not needed straight away and can be forgotten before they are used. When you learn a better way of doing what you already do, you can use it straight away and reinforce the learning.

There are two main ways to improve on the current methods you use to do things.

- Ensure your windows environment and other software is configured to suit the tasks you carry out.
- Move from a mouse focussed way of working to using the keyboard, where it is faster.

The advantages of using the keyboard over the mouse are not always recognized. When people learn how to use software they typically favour using the mouse to carry out functions. The mouse is very intuitive to use and requires little thought as there are only 4 or 5 mouse actions that can be carried out with it (click, double click, wheel etc.). The rest of what you need to do is accomplished by looking around the screen to find what to click on. Once a person knows one way to do something they usually stick with it.

The downside to using a mouse is that you must move the pointer accurately around the screen to select various actions. The time taken to move your hand off the keyboard, move the mouse pointer accurately and reposition your hand back on the keyboard adds up quite quickly.

Learning how to use the keyboard instead of the mouse is not difficult, with the right training. When used appropriately the keyboard can save several seconds every minute, especially for repetitive tasks.

The biggest challenge to people moving towards using the keyboard more, is good old fashioned habit. They already know how to use the mouse. Using the keyboard will initially feel awkward and be slower, so they may not see the benefit to persevering with learning a new method. This situation is made more challenging as each action carried out with the mouse only takes a second or two.

***Remember though, saving 3 to 6 seconds a minute is a 5% to 10% improvement in productivity!***

This questionnaire is based around Windows 7 and Office 2010. Earlier versions of these products generally have equivalent functions to those covered here. Only basic and common functions are covered.

If you would like to discuss training options for you or your company please contact me.

Enjoy the quiz.

*Neil*

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## Windows & Software Configuration

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The windows interface and that of many programs are highly configurable. Arranging those interfaces to suit the way you work increases productivity. The following questions check your knowledge of these issues and some other general knowledge issues.

Do you know how to ...

	Yes
Move and resize the Task Bar	
Lock the Task Bar	
Change icon sizes on the Task Bar, the Start Menu and the desktop	
Change how multiple icons on the Start Menu are displayed	
Pin and un-Pin programs to the Start Menu and Task Bar	
Pin and un-Pin recently used documents and folders	
Maximise, Minimise and Restore windows with mouse <b>and</b> keys	
Move and resize windows with mouse <b>and</b> keys	
Maximise windows in several ways, including filling from top to bottom of screen with the mouse	
Show windows side by side	
Show the Desktop with keys	
Start Windows Explorer with keys	
Lock the computer with keys	
Use Task Manager and start it with keys or mouse	
Manage icons in the system tray	
Correctly remove USB memory sticks and external hard disk drives	
Rotate your monitor (not all monitors allow this) and change the display to suit	
Change the screen resolution	
Manage multiple monitors	

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## Common Software Skills

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There are many activities common to various programs, like saving files and undoing mistakes. This section covers such skills and looks at how much you currently use the keyboard.

Do you know how to ...

	With Mouse	With Keys
Save a file to a location of your choice		
Save a file with a different name		
Undo a mistake		
Redo a previous undo		
Repeat the last action		
Confirm questions like "OK" and "Cancel"		
Rename an object like a file		
Swap between multiple applications		
Zoom the display		
Move around a form, including tabs with keys	✗	
Select button actions on forms with keys	✗	
Use the Inline Menu key	✗	
Select text with the keyboard	✗	
Copy, move and delete text and objects with the keyboard	✗	
Use Paste Special with keys	✗	
Close applications and documents with keys	✗	
Shutdown windows with keys	✗	
Drag objects and text from one application to another (via task bar)		✗
Control whether objects are copied or moved when dragged with the mouse		✗
Hide and show the Ribbon		✗
Modify Quick Access Toolbars		✗
Modify Ribbons		✗
Recognise and use Contextual Tabs		✗
Capture the image of the screen or window to paste into a document or save as a file		

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## Word

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Microsoft Word is the most popular word processor in use today. Over time it has come to include not just a large number of functions, but also many new ways of accessing the older familiar functions. Knowing how to quickly get to the functions you need is as important as learning new functions.

Do you know how to ...

	Yes
View or hide the ruler, navigation pane and status bar	
Navigate the document effectively with mouse <b>and</b> keys	
Use Words enhanced text selection methods to increase speed including multiple selections	
Use the clipboard history and configure to open quickly with keys	
Change the "browse to" object	
Change the way a document is viewed and the advantages of each view	
Search and replace text in a document	
Type commonly used phrases and words with a few keystrokes	
Spell check a document and use the Thesaurus	
Add and remove words to the custom dictionary	
Change preferences to suit the way you work, like showing and hiding spelling and grammar errors	
Align text effectively with mouse and keys	
Change font size and type with keys	
Use the format painter	
Change line spacing	
Force a new page to be used	
Move to a new line without a new paragraph	
Override default paragraph behaviour	
Use different tabs effectively and change the default tab stop distance	
Use and modify bulleted and numbered lists	
Use section breaks, for example to have some parts of a document as portrait and part landscape	
Use styles to produce consistent work quickly, including numbered headings	
Insert and modify tables	
Create headers and footers with document information and page numbering	
Change text to superscript or subscript with keys	
Change from upper, lower and proper case quickly	
Work with pictures in a document	
Protect a document from modification	
Use bookmarks and hyperlinks	
Use mail merge	

For more adventurous Word users, do you know how to ...

	Yes
Create and use templates	
Insert and modify a table of contents	
Sort data in tables	
Use formulas in tables	
Insert charts (graphs) into a document	
Create organisation charts, flow charts and other diagrams	
Use automated fields and document information fields	
Use columns to create documents like newspaper articles or information leaflets	
Use drop caps for effect	
Create an index	
Use footnotes and endnotes	
Use track changes and document compare, for reviewing documents	
Object Linking and Embedding (OLE)	
Use Watermarks	
Create forms to gather information	

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## Excel

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Excel is a very powerful program capable of complex calculations. It also provides an environment to automate data manipulation that is more often only limited by the users imagination. As with Microsoft Word, there are often more efficient methods of doing things than the way in which a person first learns.

Do you know how to ...

	Yes
Navigate around the worksheet with keys, including quickly traversing columns or rows full of data	
View or hide Grid Lines, Formula Bar and Headings	
Hide and unhide rows and columns	
Zoom with keys and mouse	
Move between sheets with keys and mouse	
Use keys to cycle between open workbooks	
Automatically adjust the width (or height) of multiple columns (or rows)	
Keep certain rows at the top and/or columns at the left always visible	
Paste only certain parts of what you've copied, like values or formatting	
Use the format painter	
Change preferences to suit the way you work, like default file locations and fonts	
Enter basic equations and edit the cells they refer to	
Change font type and size with keys	
Understand how to use absolute and relative references	
Find problems with equations referencing other cells	
Rename Sheets	
Create new and delete existing sheets	
Copy sheets within and to another workbook	
Show two instances of excel side by side for comparison	
Use search and replace in text and equations	
Sort data	
Filter data	
Protect data during sorting	
Use auto fill	
Create your own custom lists	
Create and modify charts (graphs)	
Use Range Names effectively	
Insert Hyperlinks	
Insert objects and pictures in Excel and configure how changes to the workbook affect them	
Create organisation charts, flow charts and other diagrams	
Use automated fields and document information fields	
Use templates	

For more adventurous Excel users, do you know how to ...

	Yes
Protect parts of a workbook from accidental change	
Data validation with values and lists	
Use conditional formatting	
Use VLookup and HLookup	
Manage unavoidable errors to prevent them upsetting other results	
Import text files and separating text into columns	
Work across multiple sheets	
Record and modify macros	
Trigger Macros with keys	
Add buttons to the workbook to trigger macros	
Design and use forms	
Develop VBA code for specific solutions	



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## File Management

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To be able to manage files with confidence is an important basic skill without which a lot of work can be lost or wasted. Windows Explorer is the tool provided by Windows to manage files.

Do you know how to ...

	Yes
Show or hide the menu bar	
Change the way files in a folder are viewed	
Change what details are seen for files	
Resize and move columns in details view	
Select all files or some files in folder	
Move, copy and delete files with the mouse <b>and</b> keys	
Move and copy files via the menu (and advantages of doing so)	
Rename files	
Recover files from the Recycle bin	
Create new folders	
Use Favourites in Windows 7	
Expand and contract folders without selecting them and what are the benefits of doing this	
Use keys to move backward and forwards through the history of where you have been	
Find, sort and filter files	
Avoid the complications that may arise from storing files on the desktop	
Work with multiple instances of Windows Explorer	
Create other office files directly in Windows Explorer	
Check the capacity of a drive or USB key	
Back up your files to another location	

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## Outlook

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Microsoft Outlook is still a very popular mail client in the business world. E-mail is often the public face of your company. Knowing your way around the application is worthwhile.

Do you know how to ...

	Yes
Open a new mail message with keys	
Send a copy of E-mail to others	
Send a blind copy to others	
Switch between Mail, Calendar Contacts etc. with keys	
Force a send and receive with keys	
Add a new contact	
Work with Contacts and Suggested Contacts	
Create Groups	
Create and use signatures	
Create Rules	
Use Quick Steps	
Attach files to and save files from an E-mail	
Setup recurring appointments	