

Excel Basics Proficiency Test

Microsoft Excel

Technical Manual and User Guide

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Seliant Aps
Gammel Hasserisvej 123
9000 Aalborg
Denmark

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For orders and inquiries:
Seliant Aps, Customer Service
Email: contact@seliant.com
Website: www.seliant.com

Excel Basics Proficiency Test

Technical Manual

This document serves as the official Technical Manual for the Excel Basics Proficiency Test. It provides a comprehensive overview of the purpose, structure, and psychometric foundations of the assessment, along with detailed guidance on its administration, scoring, and interpretation. The Excel Basics Proficiency Test is designed to measure the fundamental spreadsheet skills required in a wide range of administrative, clerical, customer service, and operational roles. These skills—such as navigation, basic formulas, formatting, and data organization—form the essential foundation for effective and productive work in modern computer-based environments.

The test provides an objective, reliable, and valid measure of these core competencies, supporting organizations in making informed, evidence-based decisions when selecting or developing employees who need practical Excel proficiency. Whether used for hiring, training evaluation, or internal development, the assessment offers a standardized method for identifying candidates who can confidently perform everyday Excel tasks.

In addition to outlining the theoretical basis and validation evidence supporting the test, this manual offers practical insights on how to administer the assessment effectively, ensure fairness and compliance with professional testing standards, and interpret the results in a manner consistent with best practices. Whether you are an HR professional, a recruiter, a trainer, or a decision-maker involved in candidate evaluation, this manual serves as a key resource for understanding and applying the Excel Basics Proficiency Test.

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1. Introduction

The Excel Basics Proficiency Test is designed to assess a candidate's fundamental knowledge and skills in Microsoft Excel. It is intended for positions that require basic spreadsheet usage, including data entry, simple calculations, and formatting.

The test contains 30 multiple-choice questions to be completed within a 20-minute time limit. It measures the ability to perform essential tasks in Excel that are commonly required in administrative, clerical, and entry-level office roles.

1.1 Purpose of the Test

- To identify candidates who possess a working knowledge of Excel at a beginner level.
 - To provide hiring managers with a reliable and objective measure of Excel proficiency for entry-level positions.
 - To ensure that candidates can complete everyday Excel tasks with accuracy and efficiency.
-

1.2 Intended Audience

The Excel Basics Proficiency Test is suitable for roles such as:

- Administrative assistants
 - Customer service staff
 - Office clerks
 - Data entry personnel
 - Other positions requiring routine use of spreadsheets without advanced data analysis responsibilities.
-

1.3 How to Use This Manual

This manual is intended for HR professionals, recruiters, training specialists, and decision-makers who use the Excel Basics Proficiency Test as part of a selection or development process. Each chapter focuses on a specific aspect of the assessment, allowing readers to easily locate the information most relevant to their role.

- **Chapters 1–3** provide an overview of the test, its structure, and the skills it measures.
- **Chapters 4–6** contain practical information on administering, scoring, and interpreting results.
- **Chapter 7** presents the technical evidence supporting the reliability and validity of the test.

- **Chapter 8** outlines security and fair-use guidelines.
- **Appendices** include supplemental information such as sample items, score tables, and technical summaries.

Readers do not need to read the manual sequentially. You may move directly to the sections relevant to your responsibilities.

2. Test Specifications

- **Format:** Multiple-choice questions (MCQ)
- **Number of Questions:** 30
- **Time Limit:** 20 minutes
- **Answer Options:** 6 options per question, with one correct answer
- **Question Types:**
 - Primarily text-based questions
 - Some questions include images (e.g., screenshots of Excel sheets or menus)
- **Delivery Method:** Online, accessible via any modern browser (no software installation required)

This format is designed to measure a candidate's ability to complete routine Excel tasks quickly and accurately. The time limit encourages efficiency while maintaining fairness.

3. Content Domains

The Excel Basics Proficiency Test includes 30 questions distributed across six content domains. Each domain reflects fundamental Excel skills required for everyday office tasks.

3.1 Data Entry & Formatting

Covers entering, editing, and formatting data to ensure clarity and accuracy in spreadsheets.

- Merging and Centering a Title in a Financial Report
- Preventing Incorrect Data Entry in a Report
- Formula for Converting the Contents of a Cell to Uppercase
- Preserving Values: Using Paste Special Values
- Rearranging Data: Using Paste Special Transpose
- Standardizing Text Case in Employee Names
- Aligning Data for Better Readability in Reports

Coverage: 7 items

3.2 Excel Basics & Navigation

Tests general knowledge of Excel's interface, file handling, and navigation between sheets.

- Understanding Excel File Formats
- Freezing the Header Row for Easier Scrolling
- Recognizing Filters
- Searching for Specific Data in a Large Spreadsheet
- Navigating Between Multiple Sheets in a Workbook

Coverage: 5 items

3.3 Sorting & Filtering Data

Assesses ability to organize and refine data using basic sorting and filtering tools.

- Filtering Employees by Department and Job Title
- Quickly Clearing All Filters in a Dataset
- Applying Multiple Filters to Find Specific Data

- Understanding How Sorting Affects Data in a Table
- Recognizing Filters

Coverage: 5 items

3.4 Basic Charts & Visuals

Measures ability to create, edit, and interpret basic Excel charts and visuals.

- Adding Data Labels for Better Readability
- Adding a Trendline to Forecast Sales
- Fixing a Chart That is Missing Data
- Best Chart for Comparing Two Sets of Data
- Recognizing a Stacked Area Chart
- Highlighting the Largest Sales Region in a Chart

Coverage: 6 items

3.5 Printing & Page Layout

Evaluates ability to prepare worksheets for professional presentation and printing.

- Changing the Paper Orientation for a Wide Report
- Adding Page Numbers to Printed Excel Sheets

Coverage: 2 items

3.6 Basic Formulas & Functions

Assesses knowledge of foundational formulas and functions for everyday calculations.

- Rounding Sales Figures for a Report
- Calculating Total Overtime Hours with a Conditional Sum
- Finding the Highest Score in an Employee Performance Review
- Determining Whether a Payment is Overdue
- Using CONCATENATE for Combining Text

Coverage: 5 items

3.7 Summary of Item Categories

Domain	Number of Items	% of Test
Data Entry & Formatting	7	23%
Excel Basics & Navigation	5	17%
Sorting & Filtering Data	5	17%
Basic Charts & Visuals	6	20%
Printing & Page Layout	2	7%
Basic Formulas & Functions	5	17%
Total	30	100%

4. Item Development

The Excel Basics Proficiency Test consists of 30 multiple-choice questions (MCQs). Each item is designed to measure one specific Excel skill within the scope of the test's content domains.

4.1 Item Types

The test items are primarily:

- **Knowledge-based questions** – assessing recognition of Excel features, terminology, or menu options.
- **Application-based questions** – presenting a short scenario that requires selecting the correct command, formula, or action.
- **Interpretive questions** – requiring candidates to analyze a small dataset, chart, or formula result to identify the correct answer.

Most items are text-only, but some include screenshots or simplified visuals to replicate real Excel tasks.

4.2 Answer Options

Each item provides six answer options, with one correct answer and three distractors.

- Distractors are designed to reflect common errors or misconceptions (e.g., incorrect formula syntax, similar but wrong menu commands).
 - This approach ensures that incorrect responses provide useful diagnostic information about candidate knowledge gaps.
-

4.3 Item Writing Guidelines

Items are created following standardized guidelines to ensure fairness, clarity, and relevance:

1. **Clarity** – Questions are written in plain language, avoiding unnecessary complexity or ambiguity.
2. **Relevance** – Each item reflects Excel tasks commonly performed in entry-level roles.
3. **Balance** – Items are distributed across all content domains to represent the test blueprint.
4. **Time Awareness** – Items are short enough to be answered within the average time per question (≈40 seconds).
5. **Accessibility** – Screenshots and visuals are kept simple and readable across devices and browsers.

4.4 Example Item

Domain: Data Entry & Formatting

Skill: Merging and Centering Titles

Question:

You are preparing a financial report in Excel. How can you center a title across the top of multiple columns?

- A. Use the “Wrap Text” feature
- B. Use “Merge & Center” from the Home tab
- C. Apply “Center Across Selection” in Alignment settings
- D. Insert a text box and place it above the data

Correct Answer: B – Use “Merge & Center” from the Home tab.

Rationale:

- Option A is incorrect because “Wrap Text” only adjusts line breaks.
- Option C is a related but less common alignment option.
- Option D is incorrect because a text box is not part of the worksheet cells.

4.5 Item Review and Quality Control

- Each item is reviewed internally for technical accuracy and clarity.
- Items are piloted and monitored for performance (difficulty and discrimination).
- Poorly performing items are revised or removed to maintain test quality.

5. Scoring & Interpretation

The Excel Basics Proficiency Test is scored objectively. Each of the 30 multiple-choice questions has one correct answer.

5.1 Scoring Method

- **Correct response** = 1 point
 - **Incorrect or unanswered response** = 0 points
 - **Total score** = sum of all item scores (maximum = 30, minimum = 0)
 - No penalty is applied for guessing
-

5.2 Score Reporting

Candidates receive a raw score (0–30) and a percentile rank.

Raw score: Number of correctly answered test items.

Percentile rank: A percentile rank indicates the percentage of test-takers who scored at or below a given score. For example, a score at the 75th percentile means the candidate performed as well as or better than 75% of the comparison group.

5.3 Interpretation of Scores

Advisory Score Ranges

Based on empirical performance patterns, candidate scores can be interpreted in the following advisory ranges:

Raw Score	Percentile rank	Interpretation
0 – 10	<i>0 – 14</i>	Very limited Excel familiarity; struggles with basic tasks.
11 – 13	<i>18 – 29</i>	Basic awareness of Excel; may manage simple tasks only.
14 – 16	<i>33 - 47</i>	Developing basic proficiency; suitable for roles requiring light Excel use.

17 – 19	<i>54 – 70</i>	Solid entry-level proficiency; capable of performing common day-to-day Excel tasks.
20 - 22	<i>75 - 82</i>	Strong foundational skills; handles basic tasks confidently.
23 - 30	<i>88 - 100</i>	High entry-level proficiency; well-prepared for routine spreadsheet tasks.

Percentile Norms

Percentile ranks provide additional context by showing how a candidate compares to the tested population (n = 538).

Percentile	Score (out of 30)	Interpretation
10th	10	Lower 10% of test-takers
25th	13	Below-average performance
50th (Median)	17	Typical Entry-Level performance
75th	20	Strong foundational skills (top 25%)
90th	24	Excellent performance (top 10%)

Example interpretations:

- A score of **17** places a candidate at the **50th percentile** — the median performance.
- A score of **20** places a candidate in the **top 25%** of all test-takers.
- A score of **24** places a candidate among the **top 10%** of respondents.

5.4 Suggested Use of Scores

Employers may use both **advisory ranges** and **percentile ranks** when interpreting results:

- Roles requiring **minimal Excel use**: Scores of **14–16** are generally sufficient.
- Roles requiring **regular basic Excel work**: **17–19** is recommended.
- Roles requiring **confidence with foundational tasks**: **20+** is advisable.

Scores should be used **together with** other candidate information such as interviews, work samples, or training history.

5.5 Limitations

- The test measures basic conceptual Excel knowledge, not hands-on spreadsheet manipulation.
- It reflects performance in a timed, multiple-choice format.
- Scores should not be the sole deciding factor in hiring decisions.

6. Test Administration

The Excel Basics Proficiency Test is designed for online delivery and can be administered flexibly across a variety of environments. This chapter outlines requirements and best practices for administering the assessment.

6.1 Delivery Method

- The test is delivered online through a secure testing platform.
 - No software installation is required.
 - The test can be accessed through any modern browser (e.g., Chrome, Edge, Firefox, Safari).
-

6.2 Technical Requirements

To ensure a smooth testing experience, the following minimum requirements should be met:

- **Internet connection:** Stable broadband connection.
 - **Device:** Laptop or desktop computer; while mobile devices are supported, they are not recommended for best usability.
 - **Browser settings:** JavaScript and cookies enabled.
 - **Screen size:** At least 13-inch display recommended for readability of tables and charts.
 - **Pop-up blockers:** Disabled if they interfere with test navigation.
-

6.3 Test Environment

- Candidates should complete the test in a quiet environment free of interruptions.
 - Use of Excel or other software tools is not permitted during the test.
 - It is recommended that candidates close other applications and browser tabs to maximize performance and reduce distractions.
-

6.4 Candidate Instructions

Before starting the test, candidates should be informed of the following:

- The test consists of 30 multiple-choice questions.
- The time limit is 20 minutes.

- Each question has six answer options, only one of which is correct.
 - Questions can be skipped and returned to later.
 - Scores are based on the number of correct answers; there is no penalty for guessing.
-

6.5 Security Measures

- Candidates are asked to confirm their identity before the test can begin.
 - Test sessions should be monitored if security is critical (e.g., proctored testing for recruitment).
 - Candidate results are stored securely in compliance with data privacy regulations.
-

6.6 Sample Questions

Before the timed portion begins, candidates are presented with two sample questions. These items are:

- **Untimed** — they do not count toward the 20-minute limit.
- **Unscored** — responses do not contribute to the final test result.
- **Representative** — they illustrate the types of questions used in the test, including both text-based and screenshot-based items.

The purpose of the sample questions is to:

- Familiarize candidates with the test format and navigation.
- Allow candidates to practice selecting an answer before the test begins.
- Reduce anxiety and ensure smoother test-taking performance.

7. Validity & Reliability

The validity of the Excel Basics Proficiency Test was examined through multiple sources of evidence, including face validity, construct validity, and statistical analyses. Together, these results support the conclusion that the test provides a reliable measure of basic Excel proficiency.

7.1 Sample

The validity analyses presented in this chapter are based on data collected from 538 individuals who completed the Excel Basics Proficiency Test.

This sample size provides a solid foundation for evaluating the test's reliability and validity evidence.

7.2 Face Validity

Face validity refers to the extent to which a test appears to measure what it is intended to measure. After completing the test, candidates were asked whether the questions reflect real workplace Excel tasks.

- **74.2%** of respondents selected *Agree*.
- **21%** selected *I don't know*.
- **4.8%** selected *Disagree*.

These results indicate that a strong majority of respondents perceive the test as relevant and representative of Excel use in professional settings.

7.3 Construct Validity

Construct validity assesses whether the test accurately measures Excel proficiency, as intended.

Self-Reported Skill Level

Candidates rated their own Excel ability on a scale from *Novice (1)* to *Expert (5)*. Average test scores increased consistently across all self-reported levels:

- Novice: ~14 correct answers
- Basic: ~15 correct
- Intermediate: ~18 correct
- Proficient: ~20 correct

- Expert: ~21 correct

This clear progression indicates that the test effectively distinguishes between different proficiency levels.

7.4 Criterion-Related Validity (Concurrent Evidence)

While direct job performance data were not available, self-reported skill levels served as a proxy criterion. Test scores showed a **moderate positive association** with self-reported Excel ability (Pearson $r \approx 0.36$; Spearman $r \approx 0.38$).

These correlations provide consistent evidence of criterion-related validity, showing that the tests align well with individuals' own evaluations of their proficiency. While self-ratings are an imperfect criterion, the pattern of results confirms that both tests measure meaningful variation in Excel ability.

7.5 Item and Test Performance

Although item-level statistics are documented in Appendices, key findings are:

- Items span an appropriate range of **difficulty**, with most falling between 30–80% correct.
- **Discrimination values** were generally strong (>0.30), meaning items effectively differentiate between high- and low-scoring candidates.

These results confirm that the test is functioning as intended at the item level.

7.6 Reliability Evidence

Reliability was measured using Cronbach's alpha across all 30 items.

- **Cronbach's alpha = 0.82**, which indicates excellent internal consistency.
 - This means that the items collectively measure a coherent construct: Excel foundational skills.
-

7.7 Summary of Validity Evidence

- **Face validity:** Strong — most test-takers agreed the test reflects real workplace Excel tasks.
- **Construct validity:** Strong — higher self-reported skill levels consistently correspond with higher test scores.

- **Criterion-related validity:** Supported by moderate correlations between scores and self-reported proficiency.
- **Reliability:** Excellent internal consistency ($\alpha = 0.82$).

Taken together, these findings provide robust evidence that the Excel Basics Proficiency Test is a valid and reliable instrument for assessing Excel foundational skills in professional contexts.

8. Security & Fair Use

Maintaining the security and integrity of the Excel Basics Proficiency Test is essential to ensure valid results and fair treatment of all candidates. This chapter outlines measures taken to protect test content, guidelines for candidate conduct, and principles for responsible use of test scores.

8.1 Test Security

- **Session monitoring:** Employers may choose to use online proctoring, in-person supervision, or browser lockdown tools for high-stakes testing situations.
 - **Data protection:** Candidate responses and scores are stored securely in compliance with data privacy regulations (e.g., GDPR).
-

8.2 Candidate Integrity

- Candidates are expected to complete the test individually without assistance.
 - Use of external resources such as Excel, internet searches, or notes is not permitted.
-

8.3 Fair Use of Scores

- Test results should be used as one component of a broader hiring or development decision-making process.
 - Scores should not be the sole basis for employment decisions. Instead, they should be combined with interviews, references, and job experience.
 - Employers should ensure that score interpretation is job-related and consistent with the skills required for the role.
 - Candidates should not be denied employment opportunities on the basis of test performance alone if Excel skills are not essential to the role.
-

8.4 Ethical Guidelines

- Employers must ensure that the test is administered in a non-discriminatory manner.
- Reasonable accommodations should be provided for candidates with documented needs.
- Test data must be handled with confidentiality and should not be shared outside the hiring process

9. Appendices

The following appendices provide supporting information and reference materials for the Excel Basics Proficiency Test.

Appendix A. Glossary of Key Excel Terms

- **Cell Reference:** The address of a cell in the worksheet, such as A1 or C5.
 - **Formula:** An expression used to calculate values in Excel (e.g., =SUM(A1:A10)).
 - **Function:** A predefined calculation in Excel (e.g., =VLOOKUP, =AVERAGE).
 - **PivotTable:** A tool used to summarize and analyze large datasets.
 - **Conditional Formatting:** A feature that applies formatting automatically based on rules (e.g., highlighting cells above a threshold).
 - **Named Range:** A user-defined name assigned to a cell or range of cells.
 - **Data Validation:** Rules applied to cells to control the type of data that can be entered.
-

Appendix B. Sample Item

Domain: Data Entry & Formatting

Skill: Merging and Centering Titles

Question:

You are preparing a financial report in Excel. How can you center a title across the top of multiple columns?

- A. Use the “Wrap Text” feature
- B. Use “Merge & Center” from the Home tab
- C. Apply “Center Across Selection” in Alignment settings
- D. Insert a text box and place it above the data

Correct Answer: B – Use “Merge & Center” from the Home tab.

Rationale:

- Option A is incorrect because “Wrap Text” only adjusts line breaks.
 - Option C is a related but less common alignment option.
 - Option D is incorrect because a text box is not part of the worksheet cells.
-

Appendix C. Technical Requirements Checklist

- Device: Desktop or laptop computer
 - Internet: Stable broadband connection
 - Browser: Chrome, Edge, Firefox, or Safari (latest versions recommended)
 - Screen size: 13-inch or larger recommended
 - Browser settings: JavaScript and cookies enabled
 - Optional: Headphones or quiet testing environment
-

Appendix D. Score Interpretation Tables

Advisory Score Ranges

Raw Score	Percentile rank	Interpretation
0 – 10	0 – 14	Very limited Excel familiarity; struggles with basic tasks.
11 – 13	18 – 29	Basic awareness of Excel; may manage simple tasks only.
14 – 16	33 - 47	Developing basic proficiency; suitable for roles requiring light Excel use.
17 – 19	54 – 70	Solid entry-level proficiency; capable of performing common day-to-day Excel tasks.
20 - 22	75 - 82	Strong foundational skills; handles basic tasks confidently.
23 - 30	88 - 100	High entry-level proficiency; well-prepared for routine spreadsheet tasks.

Appendix E. Percentile Norm Ranges

Percentile Norms (n = 538)

Raw Score	N	Percentile
1	1	0
2	0	0
3	0	0
4	2	1
5	3	1
6	12	3
7	6	4
8	13	7
9	15	10
10	22	14
11	24	18
12	23	22
13	33	29
14	24	33
15	40	41
16	33	47
17	41	54
18	46	63
19	36	70
20	30	75
21	18	78
22	21	82
23	30	88
24	24	92
25	18	96
26	6	97
27	5	98
28	3	98
29	7	99
30	2	100

Appendix F. Item Statistics

Item Number	Difficulty	Discrimination
1	0.86	0.31
2	0.81	0.28
3	0.83	0.38
4	0.75	0.20
5	0.83	0.26
6	0.72	0.30
7	0.79	0.42
8	0.80	0.38
9	0.68	0.27
10	0.68	0.07
11	0.67	0.34
12	0.64	0.34
13	0.63	0.27
14	0.70	0.44
15	0.56	0.48
16	0.43	0.30
17	0.44	0.28
18	0.55	0.47
19	0.52	0.42
20	0.38	0.38
21	0.47	0.53
22	0.50	0.35
23	0.41	0.27
24	0.42	0.20
25	0.40	0.39
26	0.37	0.30
27	0.38	0.45
28	0.17	0.38
29	0.28	0.10
30	0.10	0.21

Appendix G. Norm Group: Age Distribution

Age	Percentage
18 – 25	27.1%
26 – 35	30.0%
36 – 45	21.0%
46 – 60	17.5%
60+	4.8%

Appendix H. Norm Group: Country Distribution

Country	Percentage
United States	38.9
Canada	10.6
India	9.3
United Kingdom	8.7
Australia	3.0
South Africa	2.4
Ireland	1.7
Bahamas	0.9
Italy	0.9
Malaysia	0.9
New Zealand	0.9
Egypt	0.7
Romania	0.7
United Arab Emirates	0.7

Appendix I. Norm Group: Occupational Group

Occupational Group	Percentage
Admin and Clerical	34.2
Banking and Finance	13.8
Human Resources	11.2
Other	10.6
Management	5.2
Information Technology	4.6
Customer Service	3.3
Sales and Marketing	3.0
Retail	2.8
Engineering	2.6
Health Care	1.7
Education - Teaching	1.7