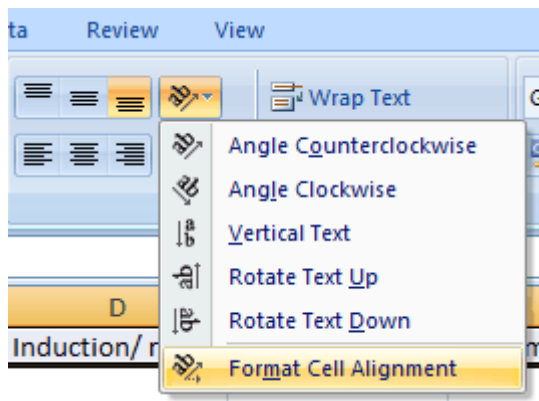# Producing a Skills Matrix in Excel 2007

A skills matrix can help you to keep track of what training each employee needs to do. You could just create a table in Word and enter all the information, but if you use Excel your matrix can tell you when training needs to be updated. These instructions assume you know a little about Excel before you start.

You need a list of staff to be trained, and a list of courses they could be trained in.   We'll start by assuming that everyone in your matrix needs to train for every course. We'll explain at the end what to do if this isn't true.

In Excel type (or paste, or import from another file) the names of the staff to be trained in column A. In Row 1 type the names of the courses you want people to attend. You can widen the columns to fit the course names, use 'format cells' to wrap the text, or turn the text around to fit it in.

In the example, I have turned the text around:
- Select all the course names
- On the 'Home' tab, click on the 'orientation' button and select 'Format cell alignment'

On the 'Alignment' tab, set orientation to 70°:
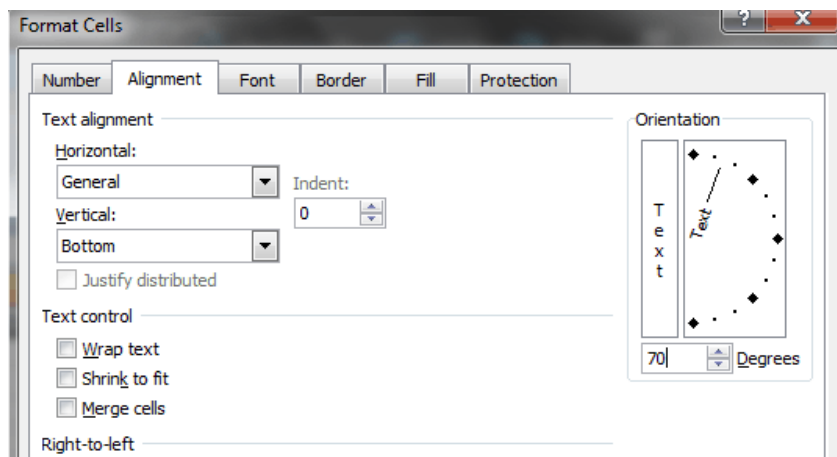
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By now you should have something like this (I've put some borders in as well):

	A	B	C	D	E	F	G
1		First Aid	Induction/ refresher health and safety	Presentation skills	Customer care	Products	
2	Brown, A						
3	Clarke, B						
4	Davids, C						
5	Ericson, D						
6	Friedrich, E						
7	Govey, F						
8	Holmes, G						
9	Inis, H						
10	Jones, I						
11							

Now we are going to add two important rows in between the names and the courses:

'Valid for (years):' is how often the course needs to be repeated. For example, assuming the first aid courses need to be renewed every 3 years, whilst the presentation skills need to be renewed every 5 years, and the products updated every 6 months (i.e. 0.5 years).

'Notice needed (days):' is how long you need to book a course. In the example, we've asked for 36 days notice to book a 1 day first-aid course and 48 days to book a 4-day course.

Then, add the dates into the grid of when everyone was last trained. For testing, use a range of dates so that some courses are out of date, some up to date, and some due soon. Our dates worked for April 2011, but obviously won't give the same results for you, as the formulae we are going to add to the spreadsheet use the current date. If an employee has never been trained for a course, leave the cell blank.

The grid now looks something like this:

	A	B	C	D	E	F	G
1		First Aid	Induction/ refresher health and safety	Presentation skills	Customer care	Products	
2	**Valid for (years)**	3	5	2	4	0.5	
3	**Notice needed (days)**	36	21	21	21	30	
4	Brown, A	24/03/2005	07/08/1998				
5	Clarke, B	04/04/2008	01/02/2010	31/12/2010	01/06/2009		
6	Davids, C	01/02/2011	01/02/2010		14/04/2007	02/06/2009	
7	Ericson, D	01/02/2011	15/02/2009	31/12/2010	01/06/2009		
8	Friedrich, E	24/03/2005	15/10/2008				
9	Govey, F	04/04/2008	07/09/2005			02/06/2009	
10	Holmes, G	15/02/2010	15/02/2009	31/12/2010	01/06/2009		
11	Inis, H	15/02/2010				02/06/2009	
12	Jones, I		05/02/2003	30/11/2007			
13							

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The small red triangles show that I've added comments to the date cells (look on the 'Review' tab for 'New Comment') – you'll see why on the last image.

Now we want the matrix to let us know whose training is out of date. The next bit may look a little complicated, but it's just the way we tell the matrix what information we want. I'm going to start by deciding my colour scheme:

- If someone has never been trained in a subject, I want the cell to be red.
- If someone has been trained in a subject but the course is now out of date, I also want the cell to be red.
- If training is going to expire within the notice period, I want the cell to be orange.
- If training is ok beyond the notice period, I want the cell to be green.

To insert these rules:

1) Select all the cells that could / do contain dates.

2) On the 'Home' tab select 'Conditional formatting' and 'Manage Rules...'

3) Select 'New Rule'

4) Select 'Use a formula to determine which cells to format'

5) In the 'Format values..' box type **=b4=0**

6) Click the 'Format...' button

7) On the 'Fill' tab select the colour you want (red in this example) then 'ok'
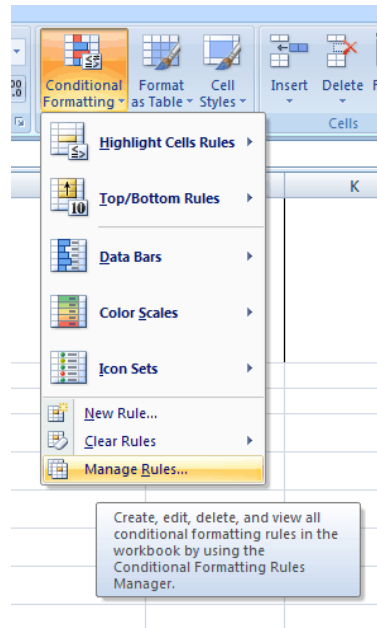
Note:

Whilst this fact sheet gives general guidance on best practice relating to this topic at the time of drafting, it is not intended to be a comprehensive guide. You are advised to seek specific advice in relation to any particular issues that need to be addressed in relation to this topic by a competent person.

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