

Create and use spreadsheets (Excel 2019)

This workbook supports BSBITU212 Create and use spreadsheets in the BSB Business Services Training Package

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BSBITU212 Create and use spreadsheets

Application

This unit describes the skills and knowledge required to correctly create and use spreadsheets and charts using both cloud-based and non-cloud based spreadsheet applications.

It applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of spreadsheet software/applications in a defined context under direct supervision or with limited individual responsibility.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Elements and Performance Criteria

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Page reference
1. Prepare to produce spreadsheet	1.1 Adjust workspace, furniture and equipment to suit own ergonomic, work organisation and work health and safety (WHS) requirements	9–12
	1.2 Identify task purpose, audience and presentation requirements, and clarify with relevant personnel as required	18–20, 70, 133–137
	1.3 Identify specific task requirements, including layout and delivery timeline, and clarify with relevant personnel as required	17–22, 70, 133–137
	1.4 Select most appropriate application to produce spreadsheet, in accordance with available resources and organisational policies	24
2. Create simple spreadsheets	2.1 Ensure data is entered, checked and amended in accordance with organisational and task requirements, to maintain consistency of design and layout	42–51, 70–71, 73, 75–83, 88–94
	2.2 Format spreadsheet using application functions; to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	46–67, 69, 75–84
	2.3 Ensure formulae are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required	32, 37–40, 50–50, 53–54, 84–94
	2.4 Use relevant help functions to overcome simple issues relating to spreadsheet design and production	95, 139

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Page reference
3. Produce simple charts	3.1 Select chart type and design that enables valid representation of numerical data and meets organisational and task requirements	96–97
	3.2 Create chart using appropriate data range in spreadsheet	99–104, 107
	3.3 Modify chart type and layout using formatting features	100–105
4. Finalise and present spreadsheets	4.1 Review and edit final spreadsheet and prepare for delivery in accordance with organisational and task requirements	66, 73–74, 88–94, 106, 126–127, 129, 130–132, 136–137, 139
	4.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements	16–17, 68–70, 106, 121–122, 126–127, 129, 130–132, 136–137, 139
	4.3 Name and store spreadsheet appropriately in accordance with organisational requirements and exit application without data loss	Throughout workbook

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description	Page reference
Reading	<ul style="list-style-type: none"> Recognises numerical and textual information within a range of resources to determine and complete work according to requirements 	Throughout workbook
Writing	<ul style="list-style-type: none"> Enters and amends routine data into relevant digital applications using a format appropriate to requirements 	Throughout workbook
Oral communication	<ul style="list-style-type: none"> Listens to short and specific instructions and uses questions to clarify understanding 	19
	<ul style="list-style-type: none"> Uses simple mathematical language to confirm and convey requirements 	70, 138
Numeracy	<ul style="list-style-type: none"> Uses basic mathematical skills to create and apply spreadsheet formulae 	Throughout workbook
Navigate the world of work	<ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role 	10, 20–21
Interact with others	<ul style="list-style-type: none"> Recognises purpose of various communications directly relevant to own role and clarifies as required 	19–19, 70, 138
Get the work done	<ul style="list-style-type: none"> Uses key digital application features and functions in performing specific work tasks 	Throughout workbook

Assessment for this Unit

This Unit is assessed by:

- recommending spreadsheet applications
- demonstrating correct WHS practices
- demonstrating Excel use
- using a manual or help facility
- creating spreadsheets.

Assessment Requirements

Performance Evidence

Evidence of the ability to:	Page reference
<ul style="list-style-type: none"> • follow correct ergonomic requirements and organisational policies and procedures 	9–10
<ul style="list-style-type: none"> • produce spreadsheet documents that align to document purpose and appropriate to target audience 	Throughout workbook
<ul style="list-style-type: none"> • consult with appropriate personnel as required 	19, 70, 138
<ul style="list-style-type: none"> • adhere to organisational style and presentation requirements 	20, 87, 133–139
<ul style="list-style-type: none"> • use relevant help functions to rectify simple document issues 	95, 139
<ul style="list-style-type: none"> • produce spreadsheet document in appropriate format for review, including ability to create and modify simple charts 	Throughout workbook
<ul style="list-style-type: none"> • adhere to designated timelines and ensure high accuracy when preparing documents 	Throughout workbook
<ul style="list-style-type: none"> • demonstrate ability to prevent data loss and damage. 	26, 31, 120–121

Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.	Page reference
<ul style="list-style-type: none"> • Key elements of basic formatting styles appropriate to workplace documents 	Throughout workbook
<ul style="list-style-type: none"> • Key functions of spreadsheet applications, both cloud-based and non-cloud based 	Throughout workbook
<ul style="list-style-type: none"> • Key features of organisational requirements for ergonomic standards 	9–10
<ul style="list-style-type: none"> • Key features of organisational guidelines on spreadsheet manipulation and processing 	Throughout workbook

SECTION 1: ORGANISATIONAL PROCEDURES

Learning outcomes

At the end of this section you should be able to:

- understand ergonomics
- set up a workstation appropriately for the computer device being used
- understand health risks associated with computer use
- perform exercises to help prevent health issues
- use suitable file naming conventions
- apply timelines for spreadsheet creation
- determine spreadsheet requirements
- plan a spreadsheet.

File naming procedures

A file naming convention is a system for naming digital files in a logical manner. A good file naming convention is both **consistent** (using the same convention for all files) and **descriptive** (using the name to indicate the content).

Consistent file naming helps with sorting and searching for files.

Descriptive file naming allows anyone viewing the content of a folder to identify the type of data in the file without opening it. This is particularly useful if you are sharing files in a business environment.

Your workplace may already have a naming convention; this should be given to you by your supervisor or may be documented in a procedures manual.

Naming convention tips

- The name should be easy to read; avoid abbreviations that others may not understand.
- File names are usually listed alphabetically; make the first word is meaningful.
- Consider including a creation date. Even though the device assigns a date to the file, this will change if the file is edited later. Be consistent with date formats, e.g. DDMMYY or DD-MM-YYYY.
- Check consistency with the use of spaces and punctuation in file names.
- File names cannot contain the following characters / : * ' < > |
- Depending on organisational requirements, you may need to include the following in the file name:
 - organisation name
 - department name
 - document type (business case, project plan)
 - author name
 - recipient name (in the case of correspondence)
 - record number – a unique identifier applied to all documents in an organisation.

Suggested naming conventions

A letter written by Tim Smythe re Excel training could be saved using these formats:

Receiver name first	SmytheTim letter re Excel training 30072019
Document type first	Letter - Smythe re Excel training, 30_07_19
Date first	2019_07_30 Letter to Smythe, Tim re Excel training
Record number	09638320cpj_Smythe_T_300719

File naming procedure for this workbook

All exercise files used or created for this workbook are to be named using the following the file name convention:

Exercise # creation date FamilyName

Example

Exercise 23 050619 Hosana

Oral instructions

Spreadsheet requirements might be provided in a conversation with a supervisor or colleague. If complex instructions are provided orally, take notes so you do not forget any important details.

Once the person has finished speaking, repeat the information back using your own words. This is referred to as **paraphrasing** and demonstrates that you have understood the information you have been given.

Asking for clarification

If at any time you are unsure about any instruction you have been given, ask for more information. If you do not understand an instruction, ask for it to be explained a different way. It is much better to ask for clarification straight away. Creating the document and then finding you have misunderstood the requirements wastes everyone's time.

Discussing requirements with a group

Large documents will sometimes have several contributors, e.g. a business plan can contain several sections including budgeting spreadsheets which will have input from several people. You may be required to attend a meeting to plan the document and find out how your spreadsheet will relate to the rest of the document.

- Always take notes, not just about your job, but what everyone else will be responsible for. This way if you have questions, you can ask the relevant person later.
- Listen carefully to all other speakers and give them your full attention.
- Do not talk over other people.
- When it is your turn to speak, be succinct and stay on topic.
- Be assertive. If you have a good idea, present it to the group clearly.
- Ask questions. You may not be the only person who has that question. You may raise a point that no-one has thought of.

It can also be useful to discuss requirements with more experienced colleagues and ask for guidance.

Planning a spreadsheet

When creating a simple spreadsheet your planning may involve discussing your ideas with your colleagues or supervisor. In most cases it is more efficient to draft the spreadsheet in the application and ask for feedback.

Purpose

The purpose is the reason for the spreadsheet. Determining the purpose will help to identify the data to be entered and the calculations required.

Spreadsheet audience

You need to know who will be viewing the spreadsheet so you can ensure the data is presented in a suitable manner. If your audience works with spreadsheets all the time, they should be able to find the information they need from your spreadsheet easily, even in a large, complex file. They may be able to add their own calculations to your spreadsheet, removing the need for you to add all calculations yourself. If you are creating a file for a spreadsheet novice, the spreadsheet needs to be kept simple and easy to understand. Use charts to clearly indicate trends and other important information.

The purpose and audience can be discussed with your supervisor before you create the spreadsheet.

Example

The purpose of this spreadsheet is to calculate the number of students enrolled in each course for each semester and the total number of enrolments. The intended audience is senior staff members.

Drafting a spreadsheet

Creating a draft of the spreadsheet in the app can have several benefits:

- it helps you identify the most logical layout
- it may help you identify ways to make your spreadsheet more efficient or ways to add value to it
- you can show the draft to your supervisor to ensure it fits the requirements before spending a lot of time completing it.

A draft spreadsheet should include:

- basic layout, such as spreadsheet title, row/column headings
- all formulas including checking the formulas are correct by making the calculations manually or with a calculator
- at least one set of data to check formulas work.

When your supervisor has checked the draft you should be instructed:

- on how the draft should be corrected or could be improved, or
- to complete the spreadsheet by adding the remaining data and applying the formatting required by the organisation.

Example

	A	B	C	D	E	F	G	H
1	Blinds and Screens							
2	Sales Jan-June 2019							
3								
4	Product	January	February	March	April	May	June	Total
5								
6	Venetian Blinds	2030.00	2450.00	2315.00	2489.00	2680.00	2886.00	SUM(B6:G6)
7	Roller Blinds							
8	Wooden Blinds							
9	Vertical Blinds							
10	Blackout Blinds							
11	Insect Screens							
12								
13	Total	SUM(B6:B11)						

Style guides

Most organisations will have instructions for how documents should be formatted. These instructions may be detailed in a style guide. Style guides could include details on:

- use of company logos
- set headers and footers that need to be added to all documents
- company colour schemes to be used
- use of specific fonts
- use of specific formatting such as lines above and below totals
- use of templates.

Large organisations will have a detailed style guide with instructions from what font to use when writing a letter to how a company logo can and cannot be used.

Small business may just have a word processing template containing a logo and a set text style to represent a letterhead.

The organisational style guide is sometimes referred to as a **house style guide**.

Style guide for exercises in this workbook

For exercises in this workbook you will be using the Excel default style guide.

Excel defaults are the settings which are in-built when the app is installed on a device providing a suggested standard for business spreadsheets.

Excel default style guide


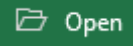
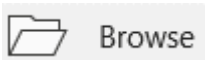
Paper size	Set to the Australia standard A4 (the USA are standard paper size is called Letter.)
Margins	Top and bottom are set to 1.9 cm Left and right are set to 1.8 cm
Text	Main font is set to Calibri, 11 pt, black Text is left aligned and numbers are right aligned in cells

The default settings for Excel may have been altered on your device in your training organisation. In this case use your training organisation's default settings when completing exercises.

How to apply a style guide for a specific organisation will be covered later in this workbook.

Moving around a worksheet

Exercise 10

1. Click on  then click on .
2. Click on .
3. Navigate to the *978-1-921971-34-1 BSBITU212 exercise files* folder.
4. Select the file **Peter Hamilton Transport**.
5. Click on Open.
6. Enable editing if required.
7. Save As the file in your working folder following workbook procedures.
8. Practise cursor movements as described below.





Cursor movements

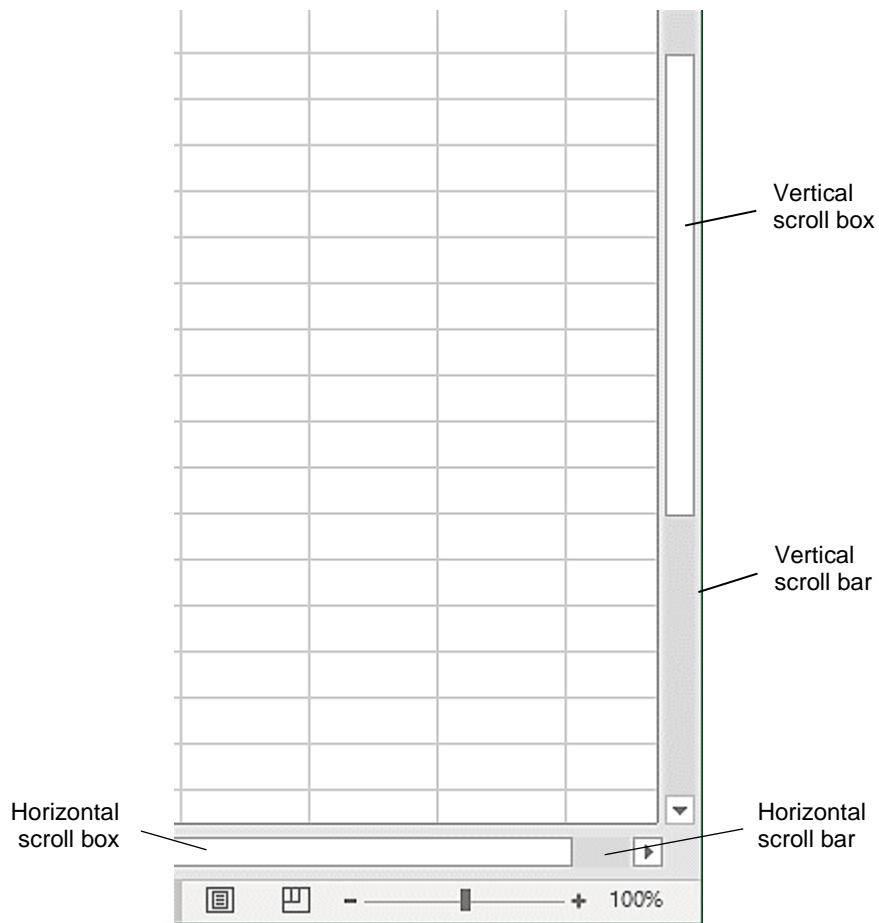
	Keyboard	Mouse
A column at a time	→ or ←	Move mouse and click
A row at a time	↑ or ↓	Move mouse and click
Beginning of a row	Home	Move mouse and click
Cell A1	Ctrl Home	Point and drag vertical scroll box up
Bottom right corner cell of data	Ctrl End	Point and drag vertical scroll box down
Next worksheet	Ctrl Page Down	Move mouse and click on sheet tab
Previous worksheet	Ctrl Page Up	Move mouse and click on sheet tab

9. Leave the workbook open for the next exercise.

Scroll bars

The vertical and horizontal scroll bars on the right and bottom of the screen will move you around the worksheet area, beyond what you can initially see on your screen.


- Click on the  at the bottom right of your screen on the vertical scroll bar to move down the worksheet.
- Click on the  to move up the worksheet.
- Dragging the scroll box on the vertical scroll bar will move quickly up or down the worksheet.
- Use the horizontal scroll box at the bottom of the screen to move to the left or right of a worksheet or click on  and .

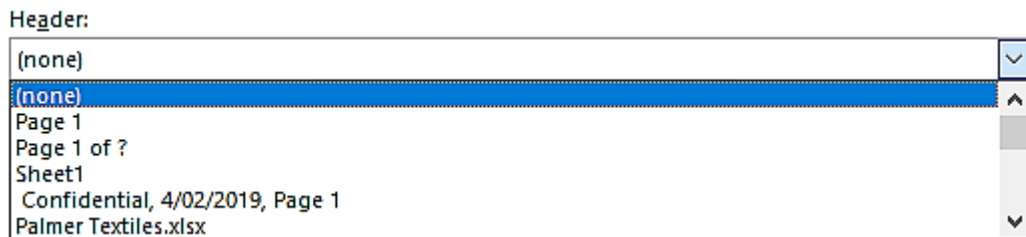


Headers and footers

Headers can be inserted at the top and footers at the bottom of a worksheet. They generally contain information such as page numbers, dates, author's name, file name. By default headers and footers are only inserted into the current worksheet. To insert them into multiple worksheets you need to select all the sheet tabs before creating the header/footer.

Predefined headers and footers

The Page Setup dialog box offers a range of built-in headers and footers to choose from. To insert predefined headers and footers, click on the Dialog Box Launcher button  in the Page Setup Group. Click on the Header/Footer tab. Built-in headers and footers can be selected from drop-down lists.



Custom headers and footers

To insert your own header or footer display the Page Setup dialog box Header/Footer tab. Click on either the Custom Header or Custom Footer button. You can enter text, page numbers, etc., as required into each section and format your entry.

