

Computer Skills

Create and Produce Spreadsheets (Excel 2013)

This workbook supports BSBITU202A Create and use spreadsheets and BSBITU304A Produce spreadsheets in the BSB07 Business Services Training Package.

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BSBITU202A CREATE AND USE SPREADSHEETS

Unit descriptor This unit describes the performance outcomes, skills and knowledge required to correctly create and use spreadsheets and charts through the use of spreadsheet software.

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

Application of the unit This unit applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of creating spreadsheets in a defined context under direct supervision or with limited individual responsibility.

Employability skills This unit contains employability skills.

Prerequisites There are no prerequisites for this unit.

Element	Performance Criteria	Page covered
1 Select and prepare resources	1.1 Adjust workspace, furniture and equipment to suit user ergonomic, work organisation and occupational health and safety (OHS) requirements	15–20
	1.2 Use energy and resource conservation techniques to minimise wastage in accordance with organisational and statutory requirements	21–22
	1.3 Identify spreadsheet task requirements and clarify with relevant personnel as required	41–42
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	Throughout workbook
	2.2 Format spreadsheet using software functions , to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	45–47, 49–57, 64–66, 87, 89–91
	2.3 Ensure formulae are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required	Throughout workbook
	2.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	73

Element	Performance Criteria	Page covered
3 Produce simple charts	3.1 Select chart type and design that enables valid representation of numerical data and meets organisational and task requirements	75–77
	3.2 Create chart using appropriate data range in the spreadsheet	79, 82
	3.3 Modify chart type and layout using formatting features	79–83
4 Finalise spreadsheets	4.1 Ensure spreadsheet and any accompanying charts are previewed, adjusted and printed in accordance with organisational and task requirements	58–59, 63, 61, 84
	4.2 Ensure data input meets designated time lines and organisational requirements for speed and accuracy	Time limits can be applied to assessment tasks
	4.3 Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage	Throughout workbook

BSBITU202A Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Variable	Scope	Page reference
Ergonomic requirements may include:	avoiding radiation from computer screens	n/a
	chair height, seat and back adjustment	17
	document holder	16
	footrest	17
	keyboard and mouse position	15–16
	lighting	n/a
	noise minimisation	n/a
	posture	17
	screen position	15
	workstation height and layout	18

Variable	Scope	Page reference
Work organisation requirements may include:	exercise breaks	19–20
	mix of repetitive and other activities	
	rest periods	
Conservation requirements may include:	double-sided paper use	21–22
	recycling used and shredded paper	
	re-using paper for rough drafts (observing confidentiality requirements)	
	utilising power-save options for equipment	
Spreadsheet task requirements may include:	data entry	41–42
	output	
	presentation	
	storage	
Data may include:	numbers	Throughout workbook
	text	
Checking may include:	accuracy of data	61
	accuracy of formulae with calculator	61
	ensuring instructions with regard to content and format have been followed	Throughout workbook
	proofreading	62
	spelling, electronically and manually	62
Formatting may include:	alignment on page	n/a
	efficiency of formulae	n/a
	enhancements to format - borders, patterns and colours	51–52
	enhancements to text	49–51
	headers/footers	89–91
	use of absolute and relative cell addresses	87
	use of cell addresses in formulae	Throughout workbook
Software functions may include:	adding/deleting columns/rows	64–66
	formatting cells	51–52
	formatting text	49–51
	headers/footers	89–91
	sizing columns/rows	45–47
Formulae may include:	absolute cell referencing and/or mixed references	87
	average	71
	division	88, 101
	maximum	72
	minimum	72
	multiplication	39, 70, 87, 94
	subtraction	38, 68, 100
	sum	Throughout workbook
combinations of above	Throughout workbook	

Variable	Scope	Page reference
Chart types may include:	area	76
	bar	75
	column	75, 79
	exploded pie	n/a
	line	76
	pie and 3-D pie	77, 82–83
	scatter/bubble	77
	stacked/multiple bar	n/a
	stacked, 3-D column	n/a
Features may include:	axes	80
	axis title	80
	borders	n/a
	chart title	80
	colours	n/a
	data labels	83
	data tables	n/a
	fills	n/a
	gridlines	n/a
	legend	80
	lines	n/a
	patterns	n/a
Printing may include:	fit on one page	58
	fit specific number of pages	n/a
	with formulae	61
	with values	59, 84
Designated time lines may include:	organisational time line e.g. financial requirements	Time limits can be applied to assessment tasks
	time line agreed with internal/external client	
	time line agreed with supervisor/person requiring spreadsheet	
Storing data may include:	authorised access	Throughout workbook
	filing locations	
	organisational policy for backing up files	
	organisational policy for filing hard copies of spreadsheets	
	security	
	storage in electronic folders/sub-folders	
	storage on CD-ROM, zip drives, USB memory	

BSBITU304A PRODUCE SPREADSHEETS

Unit descriptor This unit describes the performance outcomes, skills and knowledge required to develop spreadsheets through the use of spreadsheet software. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the unit This unit applies to individuals employed in a range of environments who require skills in the creation of spreadsheets that encompass formatting, formulae and charts. They tend to be personally responsible for designing and working with spreadsheets under minimal supervision.

Employability skills This unit contains employability skills.

Prerequisites There are no prerequisites for this unit.

Element	Performance Criteria	Page covered
1 Select and prepare resources	1.1 Adhere to ergonomic, work organisation and occupational health and safety requirements	15–18
	1.2 Use energy and resource conservation techniques to minimise wastage	19–20
	1.3 Identify spreadsheet task requirements in relation to data entry, storage, output and presentation	41–42, 118–122
2 Plan spreadsheet design	2.1 Ensure spreadsheet design suits the purpose, audience and information requirements of the task	71–72, 89–110, 113–123,
	2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout	41–42, 118–122
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	49–52, 79, 89–91, 111, 119
3 Create spreadsheet	3.1 Ensure data is entered, checked and amended to maintain consistency of design and layout, in accordance with organisational and task requirements	Throughout workbook
	3.2 Format spreadsheet using software functions to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	45–47, 49–52, 54, 64–66, 87, 89–91, 113–117

Element	Performance Criteria	Page covered
	3.3 Ensure formulae are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required	Throughout workbook
	3.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	73
4 Produce simple charts	4.1 Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements	75–77
	4.2 Create charts using appropriate data range in the spreadsheet	79, 82
	4.3 Modify chart type and layout using formatting features	79–82
5 Finalise spreadsheets	5.1 Preview, adjust and print spreadsheet and any accompanying charts, in accordance with task requirements	58–61, 63, 84–84
	5.2 Ensure data input meets designated time lines and organisational requirements for speed and accuracy	Time limits should be applied to assessment tasks
	5.3 Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage	Throughout workbook

BSBITU304A Range Statement

The Range Statement contextualises the unit of competency and provides a focus for assessment. The information provided is intended to define the scope of assessment and to assist assessors define the performance to be achieved by an individual in the workplace. The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Italicised wording in the Performance Criteria is detailed as follows.

Variable	Scope	Page reference
<i>Ergonomic requirements</i> may include:	avoiding radiation from computer screens	n/a
	chair height, seat and back adjustment	17
	document holder	16
	footrest	17
	keyboard and mouse position	15–16
	lighting	n/a
	noise minimisation	n/a
	posture	17
	screen position	15
	workstation height and layout	18
<i>Work organisation requirements</i> may include:	exercise breaks	19–20
	mix of repetitive and other activities	
	rest periods	
<i>Occupational health and safety requirements</i> may include:	inspections	n/a
	organisational procedures regarding incidents, accidents, fire and emergencies	n/a
	workplace meetings	n/a
	workplace safety procedures	23
	other consultative activities	n/a
<i>Conservation requirements</i> may include:	double-sided paper use	21–22
	recycling used and shredded paper	
	re-using paper for rough drafts (observing confidentiality requirements)	
	utilising power-save options for equipment	
<i>Spreadsheet design</i> may include:	appropriateness to required tasks	118–123
	basic analysis	118–119
	charts	Throughout workbook
	formatting and reformatting	Throughout workbook
	formulae	Throughout workbook
	functions	71–72
	headers and footers	89–91
	headings	Throughout workbook
	headings and labels	Throughout workbook
	identification and parameters	n/a
	import and export of data	110 (import only)
	labels	Throughout workbook
	macros	113–117

Variable	Scope	Page reference
	multi-page documents	106–109
	split screen operation	n/a
Automatic functions may include:	auto date	n/a
	auto correct	111
	auto format	n/a
	auto text	n/a
	default settings	Throughout workbook
	headers and footers	89–91
	page numbering	89–91
	styles	79
	table headings	n/a
Consistency of design and layout may include:	borders	51–52
	bullet/number lists	n/a
	captions	n/a
	consistency with other business documents	119
	page numbers	89–91
	spacings	n/a
	typeface styles and point size	50–51
Data may include:	numbers	Throughout workbook
	text	
Checking may include:	accuracy of data	61
	accuracy of formulae with calculator	61
	ensuring instructions with regard to content and format have been followed	Throughout workbook
	proofreading	62
	spelling, electronically and manually	62
Formatting may include:	alignment on page	54
	efficiency of formulae	n/a
	enhancements to format - borders, patterns and colours	51–52
	enhancements to text	49–51
	headers/footers	89–91
	use of absolute and relative cell addresses	87
	use of cell addresses in formulae	Throughout workbook

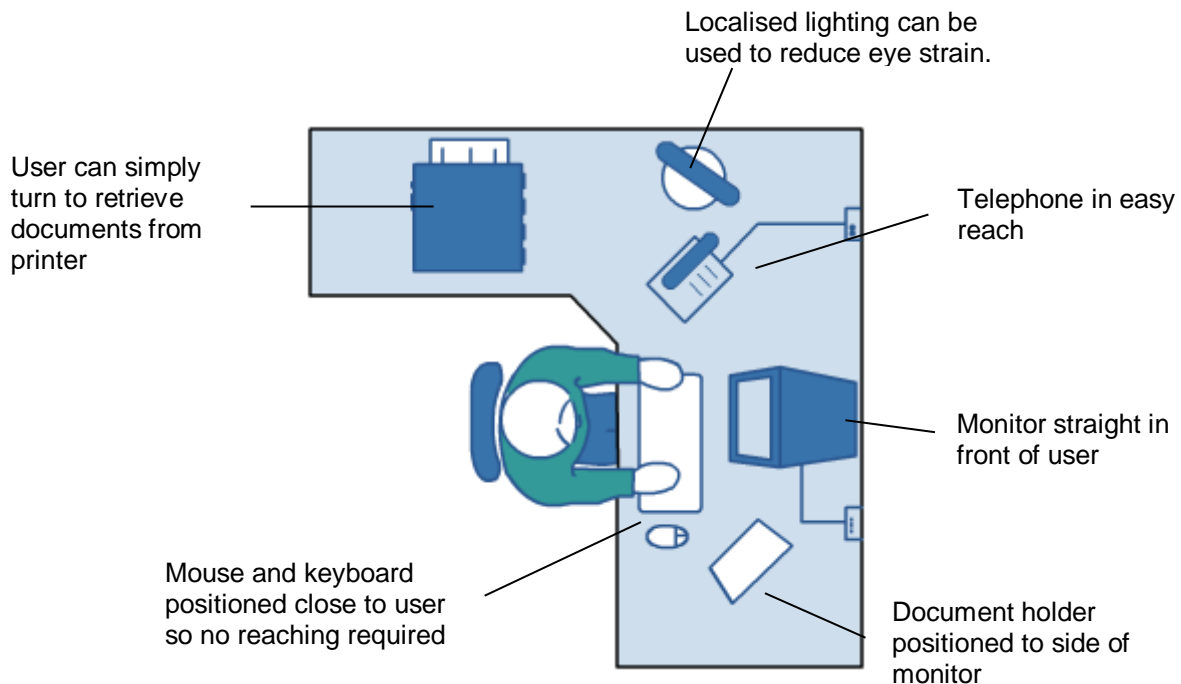
Variable	Scope	Page reference
Software functions may include:	adding/deleting columns/rows	64–66
	formatting cells	51–52
	formatting text	49–51
	headers/footers	89–91
	sizing columns/rows	45–47
	using macros	113–117
	utilising shortcuts	114–116
Formulae may include:	average	71
	division	88, 101
	multiplication	39, 70, 87, 94
	percentage	39, 70, 88
	subtraction	38, 68, 100
	sum	Throughout workbook
	combinations of above	Throughout workbook
Printing may include:	charts	84
	entire workbooks	84
	selected data within a worksheet	n/a
	worksheets	Throughout book
Designated time lines may include:	organisational time line e.g. financial requirements	Time limits should be applied to assessment tasks
	time line agreed with internal/external client	
	time line agreed with supervisor/person requiring spreadsheet	
Naming and storing spreadsheet may include:	authorised access	Throughout book
	file naming conventions	
	filing locations	
	organisational policy for backing up files	
	organisational policy for filing hard copies of spreadsheets	
	security	
	storage in electronic folders/sub-folders	
	storage on CD-ROM, USB, tape back-up, server	

Workstation

A workstation is simply the desk or table used when working on a computer.

- The workstation should be deep enough to allow the positioning of the keyboard and monitor correctly.
- The work surface needs to be big enough to allow the mouse, documents, document holder and any other items which are used regularly (telephone, desk caddy) to be within easy reach.
- It should also be as thin as practical, preferably less than 2.5 cm to give maximum knee room.
- Ideally the height of the workstation should be adjustable to suit the height of the operator. If it is not adjustable a foot rest may need to be used.

The equipment on the workstation needs to be arranged so that all equipment can be reached comfortably. Frequently used items should be within easy reach. A possible workstation layout is shown below.



Workstation Location

The location of the workstation within an office needs to be chosen with care.

- The workstation should be positioned at right angles to windows, mirrors or other light sources to help reduce glare or reflections.
- Power cables need to be able to reach the computer safely, without being stretched or lying across access ways.
- In a large office, space or partitions between desks can help to give the illusion of having privacy in one's workspace.

OOS

Occupational overuse syndrome (OOS) is a collective term for a range of conditions which cause discomfort or pain and which are caused by performing repetitive tasks. Symptoms can include:

- fatigue
- pain in the muscles or tendons
- burning sensations
- stiffness
- weakness
- numbness and tingling.

People who work at a computer workstation for lengthy periods are particularly susceptible to OOS. Typing and using the mouse both require repetitive action which can result in pain in the hands, wrists, arms, shoulders and neck. OOS can also be exacerbated by inappropriate office furniture, poor workstation layout and poor work organisation.

Anyone who works for long periods of time at a workstation is at risk of developing OOS, but there are steps that can be taken to reduce this risk.

Create an Ergonomically Correct Workstation

A correct workstation layout can have big impact on OOS prevention.

Vary Tasks

Try to organise your day so that you vary your tasks. Typing non-stop for a long time can be damaging. Take a break from your computer to do filing or make business phone calls.

Breaks and Micropauses

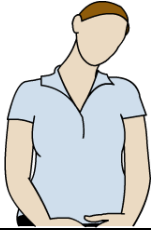
Operators should be given frequent breaks away from their computer in order to avoid eyestrain and posture problems. The recommended break is 5–10 minutes every hour worked where work is screen-intensive. Make sure you do not work through your lunch break.

A micropause is a short break from work for muscle relaxation. Generally it is a 5–15 second break every 5–10 minutes. Micropauses allow for the restoration of blood flow to muscles which have been held tense. Computer applications are available that remind you to take regular micropauses.

Physical Exercises

Physical exercises can be performed to and reduce the risk of OOS. Some examples are shown on the following page.

Exercises to Prevent OOS



Side neck stretch

Slowly tilt your head to one side, stretching the side of your neck. Return your head to upright and repeat on the other side.



Head turn

Slowly turn your head to one side. Return to centre and repeat on the other side.



Bidirectional neck stretch

Bend your head forward and then turn your head to right. Use your right hand to gently pull your chin down towards your armpit. Repeat on the other side.



Shoulder roll

Lift both shoulders upward toward your ears and then down again slowly. Roll your shoulders gently backwards and forwards to ease tension in the neck.



Upper back stretch

Clasp your hands behind your head, keeping your elbows straight out to the side. Gently lean over the back of your chair, stretching your upper back.



Upper arm and shoulder stretch

Bend your right arm placing your right hand on your upper back. Hold your right elbow with your left hand and use this hand to gently push your right arm down. Repeat on the other side.



Chest and shoulder stretch

Interlace your fingers behind your back. Gently turn your elbows inwards, straightening your arms. Pause and then release.



Arm and rib cage stretch

Interlock your fingers; stretch your arms above your head, palms upward. Try to keep your shoulders lowered.



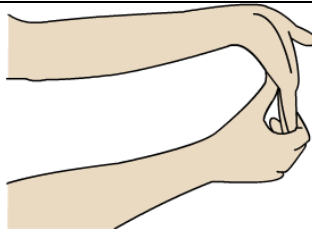
Finger spread

Hold your right arm out bent upward at the elbow. Spread fingers wide apart stretching the inner palm and fingers. Repeat on the other side.



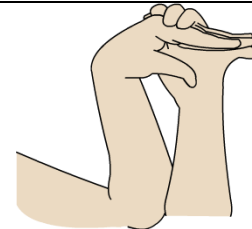
Chair twist

Sit in a chair with your left knee crossing your right. Place your right hand on the outside of your left knee. Twist and place your left hand on the back of the chair. Hold and repeat on the other side.



Front wrist stretch

Hold your right forearm out straight, palm facing up. Take your fingers with your left hand and pull them back gently so the front of your wrist is stretched. Repeat on the other side.



Back wrist stretch

Hold your right forearm out bent upward at the elbow. Take your fingers with your left hand and pull them gently downward so the back of your wrist is stretched. Repeat on the other side.

Energy and Resource Conservation

How can you Waste Less Paper?

Reuse paper	When you have finished with a document, turn the pages over and use the backs for note paper. Put waste paper through a document shredder and then use the shredded paper for packing material or give it to our local pet store.
Print and photocopy on both sides	Set up your printers and photocopiers for duplex printing (printing on both sides of the paper).
Recycle paper	Keep a cardboard box near your desk near photocopiers and printers to collect used paper. Always check paper to be reused or recycled does not have any confidential information printed on it.
Buy recycled	Some companies sell stationery made with recycled products.
Use a distribution slip	Send a document to different people in your office (each person reads the document, signs the distribution slip, then passes it on to the next person).
Avoid waste	Cut back on the use of disposable paper products by taking only as much as required to do the job, rather than taking extra just in case – the extra usually ends up being thrown out.
Reuse office products	For example folders, boxes and envelopes can be reused.
Edit on the screen	Check spelling and proofread on screen for errors instead of printing numerous copies.
Do not double up	If you do not need to keep printed copies of documents, store them in electronic format.
Send an email	Use email, the telephone or staff noticeboard for messages.

Conserving Energy

Conserving energy in your home and organisation can help the planet as well as save money on electricity bills.

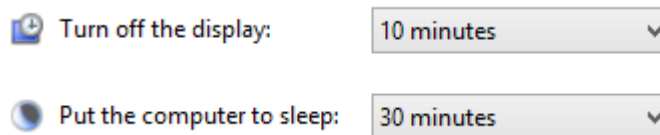
Tips to Conserve Energy

- Turn office lights off at the end of the day.
- Switch off heaters and airconditioning units at the end of the working day. You may want to consider having these devices attached to a timer.
- Turn off your desktop computer at the end of the day. Do not turn off any central servers that run backups overnight.
- Turn off printers and photocopiers off at the end of the day.

Power Saving and Computers

Make use of the energy saving features built into your computer. The power schemes available depend on the computer type and manufacturer.

Power schemes options can be changed from the computer control panel.



Turn off the display	You can select a time after which your inactive monitor will be switched off to save power. Move your mouse or press a key to reactivate the monitor.
Put computer to sleep	You can select a time after which your computer is 'put to sleep'. When a computer is sleeping the monitor and hard disk are powered down, but your files stay open. Move your mouse or press a key to wake up the computer – it may take a couple of seconds to wake up.

Note

You may need special privileges to change the power options on your computer if you are on a network.

FORMATTING NUMBERS

When a number value is entered into a cell it is formatted to a General style. This means that numbers display as an integer format (e.g. 564), a decimal format (e.g. 56.4) or if the number is longer than the current width of the cell, as a scientific notation (e.g. 56.4E+2).






If data is entered with a dollar sign (\$) as a prefix, Excel will automatically format the cell to currency.

If data is entered with a per cent sign (%) as a suffix, Excel will automatically format the cell to a percentage format.

Number formats can be changed using the Number Group in the Home Ribbon.








The Number Group contains the following tools:

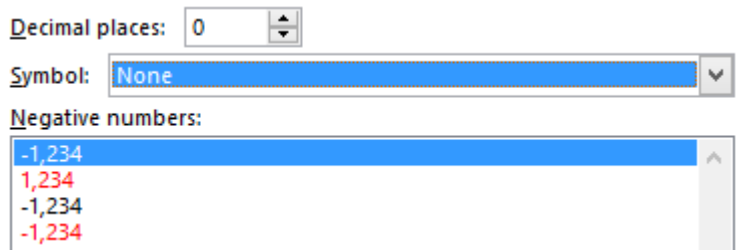
Number Format		Allows the selection of the required number format.
Accounting Number Format		Inserts \$ sign at beginning of cell and applies two decimal places. This is slight different from currency format.
Percent Style		Formats to % with no decimal places.
Comma Style		Inserts commas to separate thousands of numbers.
Increase/Decrease Decimal		Click required number of times to increase/decrease decimal places.

More detailed formatting options can be selected from the Format Cells dialog box which is accessed by clicking on the Number Group Dialog Box Launcher button.

Exercise 38

- 1 Using **Quotation**, select cells B14 to D24.
- 2 Click on the  of the Number Format drop-down list .
- 3 Select Currency.
- 4 Click on the Decrease Decimal button  twice to remove the decimal places.
- 5 With the cells still selected click on the Dialog Box Launcher button  at the bottom left corner of the Number Group. The Format Cells dialog box will display.

- 6 Click on  of the *Symbol:* box and select None.





Decimal places: 0


Symbol: None

Negative numbers:

- 1,234
- 1,234
- 1,234
- 1,234


- 7 Click on OK.
- 8 Select cells B26 to D26.
- 9 Click on the Number Group Dialog Box Launcher button .
- 10 Select Currency from the *Category:* list. Change the decimal places to 0 (if required). Click on the *Symbol:*  and select \$ English (Australia).
- 11 Click on OK.
- 12 Save the workbook and leave it open for the next exercise.

Tip

If you want to apply the currency format rather than the accounting format, you should choose Currency from the Number Format drop-down list rather than clicking on the Accounting Number Format button .

FORMATTING DATES

Exercise 39

- 1 Using **Quotation**, click in cell D4. Enter today's date into the cell and press Ctrl Enter. Excel will automatically change the format to Date.
- 2 Click on the Number Group Dialog Box Launcher button .
- 3 Select the following date format: 14/03/12
- 4 Click on OK.
- 5 In cell B11 enter the date in one month's time. Format to the same date style.
- 6 Apply an outside border to cell D4.
- 7 Save the workbook and leave it open for the next exercise.

PRINTING AND PAGE SETUP

Print Preview

When you have a worksheet on screen, you can view it exactly as it will be printed.

Exercise 40

Ctrl P 1 Using **Quotation**, click on the File tab  and click on Print .

You will see your worksheet previewed at the right of the screen.

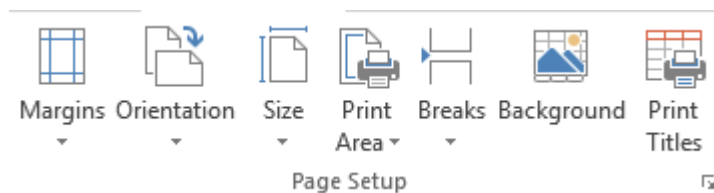
2 Click on the Zoom to Page button  in the bottom right corner of the screen. This will zoom in on the preview.

Esc 3 Click on  to return to the worksheet.

4 Save the workbook and leave it open for the next exercise.

Page Setup

Page setup options are located in the Page Setup Group on the Page Layout Ribbon.



Change Margins


Exercise 41

1 Using **Quotation**, click on the Page Layout Ribbon tab.



2 Click on the Margins button **Margins**. The Margins drop-down menu will display.



3 Select  to apply wide margins to your worksheet.


4 Save the workbook and leave it open for the next exercise.

Landscape Orientation

Orientation is the direction in which the paper lies; portrait or landscape. Portrait orientation is the default. Orientation is changed using the Orientation button in the Page Setup Group.


Exercise 42



- 1 Using **Quotation**, click on the Orientation button **Orientation** . The two orientation options will display.
- 2 Select Landscape.
- 3 Use the Print option from the File menu to preview your workbook.
- 4 Use the  **Landscape Orientation** drop-down list to change the orientation back to Portrait.
- 5 Return to the worksheet.
- 6 Save the workbook and leave it open for the next exercise.


Printing

Exercise 43

- 1 Make sure the workbook called **Quotation** is open.
 - 2 Click on **FILE** and click on **Print** .
- Ctrl P
- 
- 3 Click on the Print button to print the worksheet.
 - 4 Save and close the workbook.


Page Setup Dialog Box

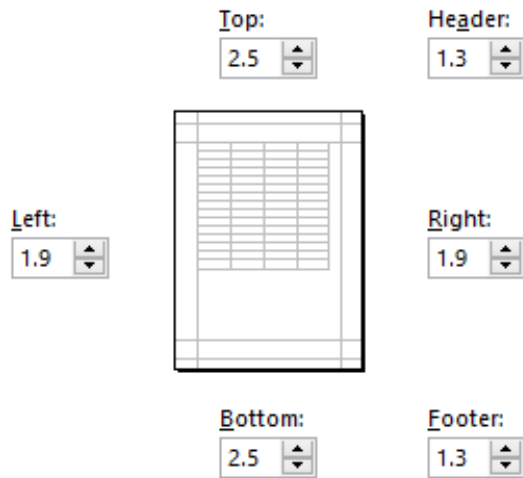
Exercise 44


- 1 Open the workbook called **Peter Hamilton Transport** This worksheet has been set up using Letter size paper. This paper size is commonly used in the United States.
- 2 Click on **FILE** and click on **Print** to preview the worksheet.
- 3 Click on the Next Page button  (at the bottom left of the preview) to move through the worksheet. You will notice that the data will be printed over 4 pages with the current page setup.
- 4 Close print preview and return to the worksheet.
- 5 Display the Page Layout Ribbon.
- 6 From the Scale to Fit Group, select the 100% in the *Scale* box and type: **80** then press Enter.



Margins

- 7 Click on  and select Custom Margins. The Page Setup dialog box will display.
- 8 Change the Top and Bottom margins to 2.5 cm and Left and Right margins to 1.9 cm.



- 9 Click on the Page tab. Click on the *Paper size:*  and select A4. A4 is the standard Australian paper size.
- 10 Click on OK.
- 11 Print preview the worksheet; it should now display on one printed page.
- 12 Click on the Print button to print the worksheet.
- 13 Save and close the workbook.

ASSESSMENT

BSBITU202A Create and use spreadsheets

The elements and performance criteria are covered during assessment in the following ways.

ELEMENT	PERFORMANCE CRITERIA	ASSESSMENT TASKS
1. Select and prepare resources	1.1 Adjust workspace, furniture and equipment to suit user ergonomic, work organisation and occupational health and safety (OHS) requirements	Task 1
	1.2 Use energy and resource conservation techniques to minimise wastage in accordance with organisational and statutory requirements	Task 1
	1.3 Identify spreadsheet task requirements and clarify with relevant personnel as required	Task 2 – Part 1 Task 2 – Part 5
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	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	2.2 Format spreadsheet using software functions , to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	Task 2 – Part 4 Task 2 – Part 7
	2.3 Ensure formulae are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	2.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	Task 2 – Part 3

ELEMENT	PERFORMANCE CRITERIA	ASSESSMENT TASKS
3. Produce simple charts	3.1 Select chart type and design that enables valid representation of numerical data and meets organisational and task requirements	Task 2 – Part 2 Task 2 – Part 6
	3.2 Create chart using appropriate data range in the spreadsheet	Task 2 – Part 4 Task 2 – Part 7
	3.3 Modify chart type and layout using formatting features	Task 2 – Part 4 Task 2 – Part 7
4. Finalise spreadsheets	4.1 Ensure spreadsheet and any accompanying charts are previewed, adjusted and printed in accordance with organisational and task requirements	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	4.2 Ensure data input meets designated time lines and organisational requirements for speed and accuracy	Timelines can be applied to any/all assessment tasks
	4.3 Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage	Task 2 – Part 4 Task 2 – Part 7

Required Skills and Knowledge

The skills and knowledge are covered during assessment in the following ways.

Required Skills	How will Evidence be Gathered?
<ul style="list-style-type: none"> communication skills to clarify requirements of spreadsheet 	Can be assessed through communication between candidate and assessor.
<ul style="list-style-type: none"> editing and proofreading skills to check own work for accuracy 	Task 2 – Part 4 Task 2 – Part 7
<ul style="list-style-type: none"> keyboarding skills to enter text and numerical data 	Task 2 – Part 4 Task 2 – Part 7
<ul style="list-style-type: none"> literacy skills to read and understand organisation's procedures, and to use basic models to produce a range of spreadsheets 	All assessment tasks
<ul style="list-style-type: none"> numeracy skills to create and use spreadsheet formulae 	Task 2 – Part 4 Task 2 – Part 7
Required Knowledge	How will Evidence be Gathered?
<ul style="list-style-type: none"> formatting of workplace documents 	Task 2 – Part 4 Task 2 – Part 7
<ul style="list-style-type: none"> organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques 	Task 1
<ul style="list-style-type: none"> organisational guidelines on spreadsheet manipulation and processing 	Task 2
<ul style="list-style-type: none"> purpose and range of use of spreadsheet functions 	Task 2 – Part 4 Task 2 – Part 7

BSBITU304A Produce spreadsheets

The elements and performance criteria are covered during assessment in the following ways.

Element	Performance Criteria	Assessment Tasks
1. Select and prepare resources	1.1 Adhere to <i>ergonomic, work organisation and occupational health and safety requirements</i>	Task 1
	1.2 Use energy and resource <i>conservation techniques</i> to minimise wastage	Task 1
	1.3 Identify spreadsheet task requirements in relation to data entry, storage, output and presentation	Task 2 Task 4
2. Plan spreadsheet design	2.1 Ensure <i>spreadsheet design</i> suits the purpose, audience and information requirements of the task	Task 2 Task 4
	2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout	Task 2 Task 4
	2.3 Use style sheets and <i>automatic functions</i> to ensure <i>consistency of design and layout</i>	Task 2 Task 3 Task 4 Task 5
3. Create spreadsheet	3.1 Ensure <i>data</i> is entered, <i>checked</i> and amended to maintain consistency of design and layout, in accordance with organisational and task requirements	Task 3 Task 5
	3.2 <i>Format</i> spreadsheet using <i>software functions</i> to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	Task 3 Task 5
	3.3 Ensure <i>formulae</i> are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required	Task 3 Task 5
	3.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	Task 4 Task 5

Element	Performance Criteria	Assessment Tasks
4. Produce simple charts	4.1 Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements	Task 4
	4.2 Create charts using appropriate data range in the spreadsheet	Task 5
	4.3 Modify chart type and layout using formatting features	Task 5
5. Finalise spreadsheets	5.1 Preview, adjust and print spreadsheet and any accompanying charts, in accordance with task requirements	Task 3 Task 5
	5.2 Ensure data input meets designated time lines and organisational requirements for speed and accuracy	Time limits should be applied to the assessment tasks at the discretion of the assessor.
	5.3 Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage	Task 3 Task 5

Required Skills and Knowledge

The skills and knowledge are covered during assessment in the following ways.

Required Skills	How will Evidence be Gathered?
<ul style="list-style-type: none">• communication skills to clarify requirements of spreadsheet	Can be assessed through communication between candidate and assessor.
<ul style="list-style-type: none">• editing and proofreading skills to check own work for accuracy against original	Tasks 3 and 5
<ul style="list-style-type: none">• keyboarding skills to enter text and numerical data	Tasks 3 and 5
<ul style="list-style-type: none">• literacy skills to read and understand organisational procedures, and to use basic models to produce a range of spreadsheets	Tasks 2–5
<ul style="list-style-type: none">• mathematical and statistical skills to use spreadsheet functions such as sum, counts and averages	Tasks 3 and 5
Required Knowledge	How will Evidence be Gathered?
<ul style="list-style-type: none">• formatting requirements of workplace documents	Tasks 2 and 4
<ul style="list-style-type: none">• organisational guidelines on spreadsheet design and use	Tasks 2 and 4
<ul style="list-style-type: none">• organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques	Task 1

BSB Business Services Training Package Supplement

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.

BSBITU202 Create and use spreadsheets

Application

This unit describes the skills and knowledge required to correctly create and use spreadsheets and charts using spreadsheet software.

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 creating spreadsheets 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>	Workbook page reference	Assessment Tasks
1. Select and prepare resources	1.1 Adjust workspace, furniture and equipment to suit own ergonomic, work organisation and work health and safety (WHS) requirements	15–20	Task 1
	1.2 Use energy and resource conservation techniques to minimise wastage in accordance with organisational and statutory requirements	21–22	Task 1
	1.3 Identify spreadsheet task requirements and clarify with relevant personnel as required	41–42	Task 2 - Part 1 Task 2 - Part 5
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	Throughout workbook	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	2.2 Format spreadsheet using software functions, to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	45–47, 49–57, 64–66, 87, 89–91	Task 2 – Part 4 Task 2 – Part 7
	2.3 Ensure formulae are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required	Throughout workbook	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	2.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	73	Task 2 – Part 3

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Workbook page reference	Assessment Tasks
3. Produce simple charts	3.1 Select chart type and design that enables valid representation of numerical data and meets organisational and task requirements	75–77	Task 2 – Part 2 Task 2 – Part 6
	3.2 Create chart using appropriate data range in spreadsheet	79, 82	Task 2 – Part 4 Task 2 – Part 7
	3.3 Modify chart type and layout using formatting features	79–83	Task 2 – Part 4 Task 2 – Part 7
4. Finalise spreadsheets	4.1 Ensure spreadsheet and any accompanying charts are previewed, adjusted and printed in accordance with organisational and task requirements	58–59, 63, 61, 84	Task 2 – Part 3 Task 2 – Part 4 Task 2 – Part 7
	4.2 Ensure data input meets designated timelines and organisational requirements for speed and accuracy	Time limits can be applied to assessment tasks	Timelines can be applied to any/all assessment tasks
	4.3 Name and store spreadsheet in accordance with organisational requirements and exit application without data loss/damage	Throughout workbook	Task 2 – Part 4 Task 2 – Part 7

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description	Workbook page reference
Reading	2.1, 2.4, 4.1, 4.3	<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	2.1, 2.3, 3.2, 4.1, 4.3	<ul style="list-style-type: none"> Enters and amends routine data into software using a format appropriate to requirements 	Throughout workbook
Oral Communication	1.3, 2.3	<ul style="list-style-type: none"> Listens to short and specific instructions and uses questions to clarify understanding Uses simple mathematical language to confirm and convey requirements 	Spreadsheet requirements can be discussed with trainer as required
Numeracy	2.1, 2.3, 3.1, 3.2	<ul style="list-style-type: none"> Uses basic mathematical skills to create and apply spreadsheet formulae 	Throughout workbook
Navigate the world of work	1.1-1.3, 2.1, 2.2, 3.1, 4.1-4.3	<ul style="list-style-type: none"> Recognises, understands and adheres to legislative and organisational requirements in undertaking own work 	Throughout workbook
Interact with others	1.3	<ul style="list-style-type: none"> Recognises purpose of various communications directly relevant to own role and clarifies as required 	Requirements of workbook exercises can be clarified with trainer as required
Get the work done	1.3, 2.1-2.4, 3.1-3.3, 4.1-4.3	<ul style="list-style-type: none"> Uses key software features and functions in performing specific work tasks 	Throughout workbook

Assessment Requirements v1.0

Performance Evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none"> produce documents following correct ergonomic, conservation, organisational and statutory requirements 	Task 1, Task 2 – Part 4 and Part 7
<ul style="list-style-type: none"> consult with appropriate personnel as required 	Candidate can consult with assessor as appropriate
<ul style="list-style-type: none"> adhere to organisational style and presentation requirements 	Task 2 – Part 1, Part 4, Part 5 and Part 7
<ul style="list-style-type: none"> refer to online help function and user documentation to rectify document problems 	Task 2 – Part 3
<ul style="list-style-type: none"> create and modify simple charts 	Task 2 – Part 4 and Part 7
<ul style="list-style-type: none"> follow designated timelines and ensure high accuracy when preparing documents 	Timelines can be applied to any/all assessment tasks
<ul style="list-style-type: none"> demonstrate ability to prevent data loss and damage. 	Assessor can ask candidate to demonstrate an appropriate shutdown routine at the conclusion of the assessment

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> demonstrate knowledge of how to format workplace documents 	Task 2 – Part 1, Part 4, Part 5 and Part 7
<ul style="list-style-type: none"> describe organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques 	Task 1
<ul style="list-style-type: none"> outline organisational guidelines on spreadsheet manipulation and processing 	Task 2 – Part 1, Part 4, Part 5 and Part 7
<ul style="list-style-type: none"> explain purpose and range of use of spreadsheet functions. 	Task 2 – Part 1, Part 4, Part 5 and Part 7

BSBITU304 Produce spreadsheets

Application

This unit describes the skills and knowledge required to develop spreadsheets through the use of spreadsheet software.

It applies to individuals employed in a range of environments who tend to be personally responsible for designing and working with spreadsheets under minimal supervision.

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>	Workbook page reference	Assessment Tasks
1. Select and prepare resources	1.1 Adhere to ergonomic, work organisation and occupational health and safety requirements	15–18	Task 1
	1.2 Use energy and resource conservation techniques to minimise wastage	19–20	Task 1
	1.3 Identify spreadsheet task requirements in relation to data entry, storage, output and presentation	41–42, 118–122	Task 2 Task 4
2. Plan spreadsheet design	2.1 Ensure spreadsheet design suits purpose, audience and information requirements of task	71–72, 89–110, 113–123,	Task 2 Task 4
	2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout	41–42, 118–122	Task 2 Task 4
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	49–52, 79, 89–91, 111, 119	Task 2 Task 3 Task 4 Task 5

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Workbook page reference	Assessment Tasks
3. Create spreadsheet	3.1 Ensure data is entered, checked and amended to maintain consistency of design and layout, in accordance with organisational and task requirements	Throughout workbook	Task 3 Task 5
	3.2 Format spreadsheet using software functions to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	45–47, 49–52, 54, 64–66, 87, 89–91, 113–117	Task 3 Task 5
	3.3 Ensure formulae are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required	Throughout workbook	Task 3 Task 5
	3.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	73	Task 4 Task 5
4. Produce simple charts	4.1 Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements	75–77	Task 4
	4.2 Create charts using appropriate data range in the spreadsheet	79, 82	Task 5
	4.3 Modify chart type and layout using formatting features	79–82	Task 5
5 Finalise spreadsheets	5.1 Preview, adjust and print spreadsheet and any accompanying charts, in accordance with task requirements	58–61, 63, 84–84	Task 3 Task 5
	5.2 Ensure data input meets designated timelines and organisational requirements for speed and accuracy	Time limits should be applied to assessment tasks	Time limits should be applied to the assessment tasks at the discretion of the assessor.
	5.3 Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage	Throughout workbook	Task 3 Task 5

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description	Workbook page reference
Reading	2.2, 3.1-3.4, 5.1	<ul style="list-style-type: none"> Recognises and interprets numerical and textual information to determine organisational and task requirements 	Throughout workbook
Writing	2.1, 3.1-3.3, 4.2, 4.3, 5.1-5.3	<ul style="list-style-type: none"> Inputs numerical and key reporting information when creating and finalising spreadsheets and uses format, layout, style guides and standard naming conventions to organise data according to purpose and audience 	Throughout workbook
Oral Communication	3.3	<ul style="list-style-type: none"> Participates in exchange of information to determine whether formulae utilised produce result required 	Exercise solutions can be discussed with trainer as required
Numeracy	4.1, 4.2	<ul style="list-style-type: none"> Uses mathematical equations to create simple formulae and validate numerical data 	Throughout workbook
Navigate the world of work	1.1-1.3, 2.1-2.3, 3.1-3.3, 4.1, 5.1-5.3	<ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role 	Throughout workbook
Interact with others	3.3	<ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes 	Workbook exercises can be discussed with classmates or workmates
Get the work done	2.1-2.3, 3.1-3.4, 4.1-4.3, 5.1-5.3	<ul style="list-style-type: none"> Uses advanced features within applications to address routine and complex work tasks 	Throughout workbook

Assessment Requirements v1.0

Performance Evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none">design spreadsheets that address a range of data and organisational requirements	Task 2, Task 4
<ul style="list-style-type: none">use software functions, graphics and support materials to create spreadsheets	Tasks 2–3, Task 5
<ul style="list-style-type: none">apply knowledge of formatting requirements for workplace documents	Tasks 2–5

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none">describe formatting requirements of workplace documents	Task 2, Task 4
<ul style="list-style-type: none">identify organisational guidelines on spreadsheet design and use	Tasks 2–5
<ul style="list-style-type: none">explain organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques	Task 1