

<b>Training Package</b>	Business Services (BSB07)	<b>HSC Requirements and Advice</b>
<b>Unit code</b>	<b>Unit title</b>	<b>HSC Indicative Hours</b>
<b>BSBITU202A</b>	<b>Create and use spreadsheets</b>	<b>20</b>

<b>Unit descriptor</b>	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.
<b>Competency field</b>	Information and Communications Technology – IT Use
<b>Application of the unit</b>	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.
<b>Employability skills</b>	This unit contains employability skills.

### Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<b>Context of and specific resources for assessment</b>	<b>Method of assessment</b>	<b>Gather information for assessment</b>
Evidence of the following is <u>essential</u> : <ul style="list-style-type: none"> <li>designing a minimum of two spreadsheets</li> <li>using cell based formulae</li> <li>creating charts using relevant data</li> <li>knowledge of purpose and range of use of spreadsheet functions.</li> </ul>	Assessment <u>must</u> ensure: <ul style="list-style-type: none"> <li>access to an actual workplace or simulated environment</li> <li>access to office equipment and resources</li> <li>access to examples of spreadsheets and simple formulae.</li> </ul>	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: <ul style="list-style-type: none"> <li>direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate</li> <li>review of final spreadsheets</li> <li>analysis of responses to case studies and scenarios</li> <li>demonstration of techniques</li> <li>oral or written questioning to assess knowledge of spreadsheet software functions.</li> </ul>	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: <ul style="list-style-type: none"> <li>general administration units</li> <li>other IT use units.</li> </ul>

## Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

### Required skills

- communication skills to clarify requirements of spreadsheet
- editing and proofreading skills to check own work for accuracy
- keyboarding skills to enter text and numerical data
- literacy skills to read and understand organisation's procedures, and to use basic models to produce a range of spreadsheets
- numeracy skills to create and use spreadsheet formulae.

### Required knowledge

- formatting of workplace documents
- organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques
- organisational guidelines on spreadsheet manipulation and processing
- purpose and range of use of spreadsheet functions.

Element	Performance Criteria	Range Statement
1 Select and prepare resources	1.1 Adjust workspace, furniture and equipment to suit user <b>ergonomic, work organisation</b> and occupational health and safety (OHS) <b>requirements</b> .	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <b><i>Bold italicised</i></b> wording, if used in the performance criteria, is detailed below.</p> <p>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.</p> <p><b><i>Ergonomic requirements</i></b> may include:</p> <ul style="list-style-type: none"> <li>• avoiding radiation from computer screens</li> <li>• chair height, seat and back adjustment</li> <li>• document holder</li> <li>• footrest</li> <li>• keyboard and mouse position</li> <li>• lighting</li> <li>• noise minimisation</li> <li>• posture</li> <li>• screen position</li> <li>• workstation height and layout.</li> </ul> <p><b><i>Work organisation requirements</i></b> may include:</p> <ul style="list-style-type: none"> <li>• exercise breaks</li> <li>• mix of repetitive and other activities</li> <li>• rest periods.</li> </ul>
	1.2 Use energy and resource <b>conservation techniques</b> to minimise wastage in accordance with organisational and statutory requirements.	<p><b><i>Conservation techniques</i></b> may include:</p> <ul style="list-style-type: none"> <li>• double sided paper use</li> <li>• recycling used and shredded paper</li> <li>• re using paper for rough drafts (observing confidentiality requirements)</li> <li>• utilising power save options for equipment.</li> </ul>
	1.3 Identify <b>spreadsheet task requirements</b> and clarify with relevant personnel as required.	<p><b><i>Spreadsheet task requirements</i></b> may include:</p> <ul style="list-style-type: none"> <li>• data entry</li> <li>• output</li> <li>• presentation</li> <li>• storage.</li> </ul>
2 Create simple spreadsheets	2.1 Ensure <b>data</b> is entered, <b>checked</b> and amended in accordance with organisational and task requirements, to maintain consistency of design and layout.	<p><b><i>Data</i></b> may include:</p> <ul style="list-style-type: none"> <li>• numbers</li> <li>• text.</li> </ul>

Element	Performance Criteria	Range Statement
		<p><b>Checking</b> may include:</p> <ul style="list-style-type: none"> <li>• accuracy of data</li> <li>• accuracy of formulae with calculator</li> <li>• ensuring instructions with regard to content and format have been followed</li> <li>• proofreading</li> <li>• spelling, electronically and manually.</li> </ul>
	<p>2.2 <b>Format</b> spreadsheet using <b>software functions</b>, to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements.</p>	<p><b>Formatting</b> may include:</p> <ul style="list-style-type: none"> <li>• alignment on page</li> <li>• efficiency of formulae</li> <li>• enhancements to format – borders, patterns and colours</li> <li>• enhancements to text</li> <li>• headers/footers</li> <li>• use of absolute and relative cell addresses</li> <li>• use of cell addresses in formulae.</li> </ul> <p><b>Software functions</b> may include:</p> <ul style="list-style-type: none"> <li>• adding/deleting columns/rows</li> <li>• formatting cells</li> <li>• formatting text</li> <li>• headers/footers</li> <li>• sizing columns/rows.</li> </ul>
	<p>2.3 Ensure <b>formulae</b> are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required.</p>	<p><b>Formulae</b> may include:</p> <ul style="list-style-type: none"> <li>• absolute cell referencing and/or mixed references</li> <li>• average</li> <li>• division</li> <li>• maximum</li> <li>• minimum</li> <li>• multiplication</li> <li>• subtraction</li> <li>• sum</li> <li>• combinations of above.</li> </ul>
	<p>2.4 Use manuals, user documentation and online help to overcome problems with spreadsheet design and production.</p>	
<p>3 Produce simple charts</p>	<p>3.1 Select <b>chart type</b> and design that enables valid representation of numerical data and meets organisational and task requirements.</p>	<p>Chart types may include:</p> <ul style="list-style-type: none"> <li>• area</li> <li>• bar</li> <li>• column</li> </ul>

Element	Performance Criteria	Range Statement
		<ul style="list-style-type: none"> <li>• exploded pie</li> <li>• line</li> <li>• pie and 3 D pie</li> <li>• scatter/bubble</li> <li>• stacked/multiple bar</li> <li>• stacked, 3 D column.</li> </ul>
	3.2 Create chart using appropriate data range in the spreadsheet.	
	3.3 Modify chart type and layout using formatting <i>features</i> .	<p><i>Features</i> may include:</p> <ul style="list-style-type: none"> <li>• axes</li> <li>• axis title</li> <li>• borders</li> <li>• chart title</li> <li>• colours</li> <li>• data labels</li> <li>• data tables</li> <li>• fills</li> <li>• gridlines</li> <li>• legend</li> <li>• lines</li> <li>• patterns.</li> </ul>
4 Finalise spreadsheets	4.1 Ensure spreadsheet and any accompanying charts are previewed, adjusted and <i>printed</i> in accordance with organisational and task requirements.	<p><i>Printing</i> may include:</p> <ul style="list-style-type: none"> <li>• fit on one page</li> <li>• fit specific number of pages</li> <li>• with formulae</li> <li>• with values.</li> </ul> <p><i>Designated time lines</i> may include:</p> <ul style="list-style-type: none"> <li>• organisational time line e.g. financial requirements</li> <li>• time line agreed with internal/external client</li> <li>• time line agreed with supervisor/person requiring spreadsheet.</li> </ul>
	4.2 Ensure data input meets designated time lines and organisational requirements for speed and accuracy.	
	4.3 Name and <i>store</i> spreadsheet in accordance with organisational requirements and exit the application without data loss/damage.	<p><i>Storing</i> data may include:</p> <ul style="list-style-type: none"> <li>• authorised access</li> <li>• filing locations</li> </ul>

Element	Performance Criteria	Range Statement
		<ul style="list-style-type: none"> <li>• organisational policy for backing up files</li> <li>• organisational policy for filing hard copies of spreadsheets</li> <li>• security</li> <li>• storage in electronic folders/sub folders</li> <li>• storage on CD ROM, zip drives, USB memory.</li> </ul>