## Unit code

**BSBITU304A**

## Unit title

**Produce spreadsheets**

## HSC Indicative Hours

**20**

## 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.

## Competency field

Information and Communications Technology – IT Use

## 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.

## 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.

<table>
<thead>
<tr>
<th>Critical aspects for assessment and evidence required to demonstrate competency in this unit</th>
<th>Context of and specific resources for assessment</th>
<th>Method of assessment</th>
<th>Gather information for assessment</th>
</tr>
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</table>
| Evidence of the following is **essential**:  
- designing spreadsheets that address a range of data and organisational requirements  
- using software functions, graphics and support materials to create spreadsheets  
- knowledge of formatting requirements of workplace documents. | Assessment **must** ensure:  
- access to office equipment and resources  
- access to samples of data for inclusion in spreadsheets. | A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:  
- direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate  
- review of energy and resource conservation techniques used to minimise wastage  
- demonstration of techniques  
- oral or written questioning to assess knowledge of spreadsheet software functions  
- review of spreadsheets produced. | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:  
- other IT use units. |
## Required Skills and Knowledge

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

<table>
<thead>
<tr>
<th>Required skills</th>
<th>Required knowledge</th>
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</thead>
<tbody>
<tr>
<td>• communication skills to clarify requirements of spreadsheet</td>
<td>• formatting requirements of workplace documents</td>
</tr>
<tr>
<td>• editing and proofreading skills to check own work for accuracy against original</td>
<td>• organisational guidelines on spreadsheet design and use</td>
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<tr>
<td>• keyboarding skills to enter text and numerical data</td>
<td>• organisational requirements for ergonomic standards, work periods and breaks, and</td>
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<tr>
<td>• literacy skills to read and understand organisational procedures, and to use</td>
<td>conservation techniques.</td>
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<tr>
<td>basic models to produce a range of spreadsheets</td>
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<tr>
<td>• mathematical and statistical skills to use spreadsheet functions such as sum,</td>
<td></td>
</tr>
<tr>
<td>counts and averages.</td>
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</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
</tr>
<tr>
<td>---------</td>
<td>----------------------</td>
</tr>
<tr>
<td>1</td>
<td>Select and prepare resources</td>
</tr>
<tr>
<td>1.1</td>
<td>Adhere to <strong>ergonomic, work organisation and occupational health and safety requirements.</strong></td>
</tr>
<tr>
<td>1.2</td>
<td>Use energy and resource <strong>conservation techniques</strong> to minimise wastage.</td>
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<tr>
<td>1.3</td>
<td>Identify spreadsheet task requirements in relation to data entry, storage, output and presentation.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
</tr>
<tr>
<td>---------</td>
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</tr>
<tr>
<td>2</td>
<td>Plan spreadsheet design</td>
</tr>
</tbody>
</table>
| 2.1 | Ensure spreadsheet design suits the purpose, audience and information requirements of the task. | Spreadsheet design may include:  
| | | • appropriateness to required tasks  
| | | • basic analysis  
| | | • charts  
| | | • formatting and reformatting  
| | | • formulae  
| | | • functions  
| | | • headers and footers  
| | | • headings  
| | | • headings and labels  
| | | • identification and parameters  
| | | • import and export of data  
| | | • labels  
| | | • macros  
| | | • multi page documents  
| | | • split screen operation.  
| 2.2 | Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout. |  
| 2.3 | Use style sheets and automatic functions to ensure consistency of design and layout. | Automatic functions may include:  
| | | • auto date  
| | | • auto correct  
| | | • auto format  
| | | • auto text  
| | | • default settings  
| | | • headers and footers  
| | | • page numbering  
| | | • styles  
| | | • table headings.  
| | | Consistency of design and layout may include:  
| | | • borders  
| | | • bullet/number lists  
| | | • captions  
| | | • consistency with other business documents  
| | | • page numbers  
| | | • spacings  
<p>| | | • typeface styles and point size. |</p>
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Create spreadsheet</td>
<td></td>
</tr>
</tbody>
</table>
| 3.1     | Ensure *data* is entered, *checked* and amended to maintain consistency of design and layout, in accordance with organisational and task requirements. | *Data* may include:  
- numbers  
- text.  
*Checking data* may include:  
- accuracy of data  
- accuracy of formulae with calculator  
- ensuring instructions with regard to content and format have been followed  
- proofreading  
- spelling, electronically and manually. |
| 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. | *Formatting* may include:  
- alignment on page  
- efficiency of formulae  
- enhancements to format – borders, patterns and colours  
- enhancements to text  
- headers/footers  
- use of absolute and relative cell addresses  
- use of cell addresses in formulae.  
*Software functions* may include:  
- adding/deleting columns/rows  
- formatting cells  
- formatting text  
- headers/footers  
- sizing columns/rows  
- using macros  
- utilising shortcuts. |
| 3.3     | Ensure *formulae* are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required. | *Formulae* may include:  
- average  
- division  
- multiplication  
- percentage  
- subtraction  
- sum  
- combinations of above. |
<p>| 3.4     | Use manuals, user documentation and online help to overcome problems with spreadsheet design and production. |   |</p>
<table>
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<tr>
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</tr>
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<tbody>
<tr>
<td>4 Produce simple charts</td>
<td>4.1 Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements.</td>
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<td></td>
<td>4.2 Create charts using appropriate data range in the spreadsheet.</td>
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<td></td>
<td>4.3 Modify chart type and layout using formatting features.</td>
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</table>
| 5 Finalise spreadsheets | 5.1 Preview, adjust and **print** spreadsheet and any accompanying charts, in accordance with task requirements. | **Printing** may include:  
- charts  
- entire workbooks  
- selected data within a worksheet  
- worksheets.  |
| | 5.2 Ensure data input meets **designated time lines** and organisational requirements for speed and accuracy. | **Designated time lines** may include:  
- organisational time line e.g. financial requirements  
- time line agreed with internal/external client  
- time line agreed with supervisor/person requiring spreadsheet.  |
| | 5.3 **Name and store spreadsheet** in accordance with organisational requirements and exit the application without data loss/damage. | **Naming and storing spreadsheet** may include:  
- authorised access  
- 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.  |