Australian Government

Department of Education, Employment and Workplace Relations

BSBITU304A Produce spreadsheets

Revision Number: 1

ISC INDUSTRY SKILLS COUNCILS
Creating Australia's Future

BSBITU304A Produce spreadsheets

Modification History

Not applicable.

Unit Descriptor

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

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.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select and prepare resources	1.1. Adhere to *ergonomic*, *work organisation and occupational health and safety requirements*
	1.2. Use energy and resource *conservation techniques* to minimise wastage
	1.3. Identify spreadsheet task requirements in relation to data entry, storage, output and presentation
2. Plan spreadsheet design	2.1. Ensure *spreadsheet design* suits the purpose, audience and information requirements of the task
	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*
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
	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
	3.3. Ensure *formulae* are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required
	3.4. Use manuals, user documentation and online help to overcome problems with spreadsheet design and production
4. Produce simple charts	4.1. Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements
	4.2. Create charts using appropriate data range in the spreadsheet
	4.3. Modify chart type and layout using formatting features
5. Finalise spreadsheets	5.1. Preview, adjust and *print* spreadsheet and any accompanying charts, in accordance with task requirements
	5.2. Ensure data input meets *designated time lines* and organisational requirements for speed and accuracy
	5.3. *Name and store spreadsheet* in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements and exit the application without data loss/damage

Required Skills and Knowledge

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 against original • keyboarding skills to enter text and numerical data • literacy skills to read and understand organisational procedures, and to use basic models to produce a range of spreadsheets • mathematical and statistical skills to use spreadsheet functions such as sum, counts and averages.
Required knowledge
• formatting requirements of workplace documents • organisational guidelines on spreadsheet design and use • organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques.

Evidence Guide

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.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	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.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to samples of data for inclusion in spreadsheets.
Method of assessment	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.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other IT use units.

Range Statement

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.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Occupational health and safety requirements may include:	• inspections • organisational procedures regarding incidents, accidents, fire and emergencies • workplace meetings • workplace safety procedures • other consultative activities
Conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Spreadsheet design may include:	• appropriateness to required tasks • basic analysis • charts • formatting and reformatting • formulae • functions • headers and footers • headings

RANGE STATEMENT

	• headings and labels • identification and parameters • import and export of data • labels • macros • multi-page documents • split screen operation
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 • typeface styles and point size
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
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

RANGE STATEMENT	
Software functions may include:	• adding/deleting columns/rows • formatting cells • formatting text • headers/footers • sizing columns/rows • using macros • utilising shortcuts
Formulae may include:	• average • division • multiplication • percentage • subtraction • sum • combinations of above
Printing may include:	• charts • entire workbooks • selected data within a worksheet • worksheets
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
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

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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