

Student workbook

BSBITU304

Produce Spreadsheets

­

**TAFE NSW would like to pay our respect and acknowledge Aboriginal and Torres Strait Islander Peoples as the Traditional Custodians of the Land, Rivers and Sea. We acknowledge and pay our respect to the Elders, both past and present of all Nations.**

Version: 20200110

Date created: 10 January 2020

Date modified: 10 January 2020

For queries please contact:

Technology and Business Services SkillsPoint

Building B, Level G, Corner Harris Street and Mary Ann Street, Ultimo NSW 2007

© NSW TAFE Commission 2018  
RTO Provider Number 90003 | CRICOS Provider Code: 00591E

This resource can be found in the TAFE NSW Learning Bank.

The content in this document is copyright © NSW TAFE Commission 2018, and should not be reproduced without the permission of the TAFE NSW. Information contained in this document is correct at time of printing: 10 January 2020. For current information, please refer to our website or your teacher as appropriate.

Contents

[Icon legends 5](#_Toc8753294)

[Introduction 7](#_Toc8753295)

[Topic 1 – Preparing to produce spreadsheets 7](#_Toc8753296)

[Adjust your workspace 7](#_Toc8753297)

[Work Health & Safety 8](#_Toc8753298)

[Energy and resource conservation 8](#_Toc8753299)

[Activity 1: Set up the work area 9](#_Toc8753300)

[What is a spreadsheet? 10](#_Toc8753301)

[So why use a spreadsheet? 11](#_Toc8753302)

[Spreadsheet purpose, audience and presentation 11](#_Toc8753303)

[Purpose of the spreadsheet 12](#_Toc8753304)

[Intended audience 12](#_Toc8753305)

[Presentation requirements 12](#_Toc8753306)

[Clarifying spreadsheet requirements 13](#_Toc8753307)

[Selecting the best application 13](#_Toc8753308)

[Organisational and task requirements 13](#_Toc8753309)

[Activity 2: Purpose, audience, and presentation 15](#_Toc8753310)

[Spreadsheet options 16](#_Toc8753311)

[Activity 3: Identify software 16](#_Toc8753312)

[Topic 2 – Planning your spreadsheet design 18](#_Toc8753313)

[Spreadsheet purpose, audience and information required 18](#_Toc8753314)

[Activity 4: Spreadsheet plan 19](#_Toc8753315)

[Getting started with Excel 20](#_Toc8753316)

[Excel basics 20](#_Toc8753317)

[Topic 3 – Creating your spreadsheets 24](#_Toc8753318)

[Cells basics 24](#_Toc8753319)

[Formulas and functions 25](#_Toc8753320)

[Working with data (optional learning) 25](#_Toc8753321)

[Activity 5: Creating a spreadsheet 26](#_Toc8753322)

[Activity 6: Amending a spreadsheet 27](#_Toc8753323)

[Activity 7: Adding functions to a spreadsheet 28](#_Toc8753324)

[Topic 4 – Creating charts 30](#_Toc8753325)

[Charts 30](#_Toc8753326)

[Activity 8: Adding charts 31](#_Toc8753327)

[Activity 9: Moving charts 31](#_Toc8753328)

[Activity 10: Modifying charts 31](#_Toc8753329)

[Topic 5 – Presenting your spreadsheets 33](#_Toc8753330)

[Activity 11: Reviewing and edit final spreadsheet 33](#_Toc8753331)

[Activity 12: Deliver spreadsheet to your audience 33](#_Toc8753332)

# Icon legends

| Icons | Descriptions |
| --- | --- |
|  | **Practice activity**  Learning activities are the tasks and exercises that assist you in gaining a clear understanding of the content in this workbook. It is important for you to undertake these activities, as they will enhance your learning.  Activities can be used to prepare you for assessments. Refer to the assessments before you commence so that you are aware which activities will assist you in completing your assessments. |
|  | **Collaboration**  Whether you discuss your learning in an online forum or in a face-to-face environment discussions allow you to create and consolidate new meaningful knowledge. |
|  | **Self-check**  A self-check is an activity that allows you to assess your own learning progress. It is an opportunity to determine the levels of your learning and to identify areas for improvement. |
|  | **Readings (Required and suggested)**  The required reading is referred to throughout this Student workbook. You will need the required text for readings and activities.  The suggested reading is quoted in the Student workbook, however you do not need a copy of this text to complete the learning. The suggested reading provides supplementary information that may assist you in completing the unit. |

Topic 1

Prepare to produce spreadsheets

# Introduction

Welcome to the unit **Design and produce spreadsheets**. Throughout this resource you’ll be working through activities aimed at building your skills and knowledge to be able to prepare design and produce professional spreadsheets. These activities will be based on a fictitious organisation called **Plan2go** where you’ll be able to put your skills to the test. Let us start with the first topic.

# Topic 1 – Preparing to produce spreadsheets

## Adjust your workspace

Before we begin working on our spreadsheets, it is important that we check that our workstation is set up ergonomically so we reduce our chances of injury.

#### Chair - height and back support

* feet flat on floor
* ankle, knees and hips at right angles
* support lower back with back of the chair
* back straight

#### Table

* adjust height of desk so elbows are at right angles to keyboard
* tops of legs should be just below table

#### Screen - tilt and brightness

* keep screen brightness to a minimum
* tilt the screen so that it may be viewed comfortably

#### Desktop layout

* clear desk of all unnecessary materials
* use a document holder for your working papers to avoid neck strain



Figure - shutterstock\_319 428278 under licence to TAFENSW

## Work Health & Safety

#### Power access

* to avoid personal injury, ensure all electrical leads and computer cables are out of the way

#### Rest breaks and exercise periods

* do some exercises or move away from the screen for 5 minutes every hour
* stretch and relax fingers at least five times
* blink eyes to rest and give them relief
* lift shoulders upwards, backwards then relax them for one minute each
* clasp hands above head, reach upwards, fingers interlaced, stretch, then drop arms

## Energy and resource conservation

Whilst we are working on our spreadsheets, it is important that we are thoughtful in our use of resources to reduce our impact on the environment.

#### Methods of reducing paper

* Photocopy and print double-sided.
* Use waste paper as note pads.
* Edit document on screen.
* Multi-function printer with options to print to mailbox or similar.
* Switch to electronic communication.
* Substitute paper communication with emails.
* Use soft copy versions for filing.
* Think before you print.
* Request suppliers to print documents double-sided.
* Specify recycled content paper in design briefs for professional communication materials.
* Use recycled paper for office printing and photocopying.
* Introduce a printing policy that aims to minimise paper consumption.

#### Methods of reducing energy usage

* Using energy efficient equipment
* Using equipment with power-saving modes
* Turn off equipment when not in use.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 1: Set up the work area

*Estimated time: 15 minutes*

#### Check your neighbour’s work area

Before you get started, discuss your neighbour’s work area in relation to ergonomic and WHS requirements and complete the checklist below. Your neighbour will do the same for you!

| Ergonomic check | ✓ |
| --- | --- |
| 1. They have adjusted the height of their desk and/or chair to suit their individual requirements. |  |
| 1. They have adjusted the height and angle of the monitor so that it is at eye level. |  |
| 1. Everything on the desk is within easy reach. |  |
| 1. They have access to a document holder. |  |
| 1. Their feet are flat on the floor or they are using a footrest. |  |

|  |  |
| --- | --- |
| Work Health & Safety check | ✓ |
| 1. They have set up the work area ergonomically to suit their own requirements. |  |
| 1. All electrical cords are out of the way. |  |
| 1. There is adequate lighting and ventilation in the room. |  |
| 1. There are no trip hazards around their work area. |  |
| 1. They are aware they should take mini-breaks to avoid muscle strain. |  |

|  |  |
| --- | --- |
| Energy & resource conservation check | ✓ |
| 1. They are aware they should always proofread their work before printing. |  |
| 1. If possible, they should print double sided. |  |
| 1. When they finish their work, they are aware they should “shut down” their computer. |  |

## What is a spreadsheet?

A spreadsheet is a file with columns and rows that displays numerical data. It does not necessarily have to be electronic. What makes an electronic spreadsheet powerful is the functionality to calculate data using mathematical formulas. Data in a spreadsheet can be sorted, arranged or calculated.

While spreadsheets are typically used for numerical data, there are a number of other things you can do with them. For example:

* Invoices and billing
* Forms
* Time sheets and payroll
* Lists; contact, shopping, to-do
* Sports team tracking
* Basic databases, i.e. contacts, inventories, tracking students and grades > Project Planning.

If you have Microsoft Excel and are connected to the Internet, you can go to *File* > *New* and you will be presented with a range of different templates. These will give you some ideas of what else you can do with spreadsheets.

## So why use a spreadsheet?

Spreadsheets perform fast, complex and accurate calculations. While spreadsheets are used to perform basic addition, subtraction, multiplication and division, they are also used for make financial, scientific and statistical mathematical functions. In addition (*see what I did there?*) spreadsheets allow you to present complex data in a simple, readable and visual form, i.e. colourful charts. Perfect for including in presentations and reports.

Using ‘What If’ scenarios, changing data and complex formulas, spreadsheets help organisations visualise the repercussions hypothetical decisions and changes through the use of colourful charts and graphs. For example inventory changes, workforce changes, sales figures, profit and loss, budgets, etc.

## Spreadsheet purpose, audience and presentation

The first step to producing professional spreadsheets is planning. The KISS principle (Keep It Simple Silly) should be used and will help to determine the:

* **purpose** of the document
* intended **audience**
* the layout and **presentation** of the document.

### Purpose of the spreadsheet

What is the purpose of the spreadsheet? What will it achieve? Consider the following options:

* **Inform** on recent sales activity
* **Respond** to a recent client sale with billing information
* **Educate** the reader
* **Record** what hours an employee worked
* **Produce** a chart for a quick analysis of information
* **Report** details about a company to its shareholders

### Intended audience

Who is going to read the document? Think about all of the people that will read the document and give consideration to factors including:

* **Prior knowledge level** – are they already familiar with the content?
* **Needs and goals** – how is the document going to meet their need for information or results
* **Level of education** – consider language, literacy and numeracy ability
* **Cultural/ethnic/religious background, gender and age** – do not discriminate

### Presentation requirements

When you produce a spreadsheet in a business environment, you need to ensure that it looks professional and is an accurate representation of the organisation that you are working for.

You many need to consider the corporate image, company colour scheme and company logo. Many organisations use a style guide for specific information relating to spreadsheet production and layout. This ensures that spreadsheet presentation is consistent with the presentation of other spreadsheets created by the organisation.

### Clarifying spreadsheet requirements

If you are unsure of anything in relation to the spreadsheet you are creating you should always consult the content author (the person who is giving you the information) or your line manager/supervisor.

Questions you might ask could be:

* What is the aim of the spreadsheet?
* What are you wanting the audience to understand?
* Can you describe who the audience is?
* Is there a specific layout you would like for the spreadsheet?
* In addition to organisational requirements, do you have any other design requirements?
* When do you require the completed spreadsheet by?
* Where would you like me to save the file?

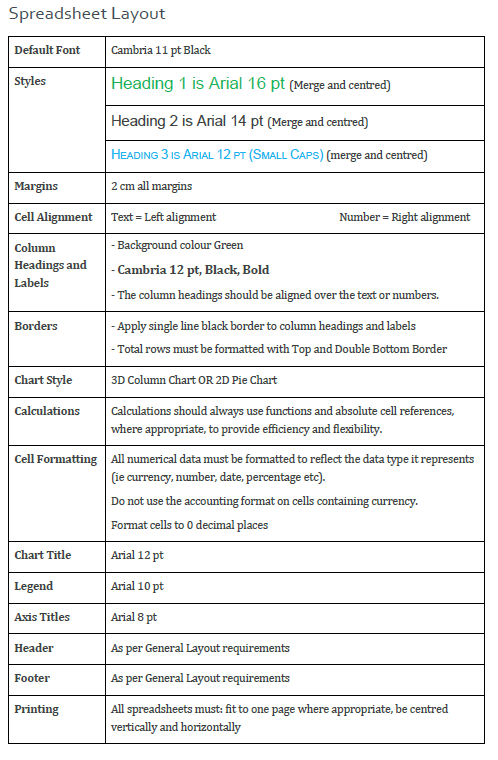
## Selecting the best application

### Organisational and task requirements

Many organisations use a **Style Guide** or **Policy and Procedures Manual** to ensure consistency of style and image in their spreadsheets. These provide guidelines for staff to following and set quality standards expected of staff in relation to the work they do.

Before you prepare any spreadsheets, check to see what the company’s usual business practice is. Often a company will have spreadsheet templates that you should use as well as a Style Guide to follow so that the company can ensure a consistent and professional standard for all spreadsheets.

Included in a Style Guide are guidelines on spreadsheet creation and standard spreadsheet formats containing preferred default settings such as font, formatting and heading requirements that are to be used for spreadsheets and charts. They will usually provide information on where files should be saved, what the file naming procedure/convention is and policies for backing up of documents.



#### Consistency of style and image

It is important to be consistent in the layout of all spreadsheets:

* the style and point size should be consistent throughout the spreadsheet
* Ensure organisational policy and procedures for content and format have been followed
* Documents are easier to read without underline and all capital letters
* Use font style and point size with care - they should enhance the appearance of your spreadsheet for ease of reading and not create confusion for your reader

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 2: Purpose, audience, and presentation

Read through the following extract from a memo from your supervisor at Plan2go and answer the questions. Bring your responses to class for discussion with your peers.

Note: Plan2go Style guide requirements can be found on page 14 of this Student Workbook for BSBITU314.

**MEMORANDUM**

**To:** <Your name>

**From:** Di Cormack – Leader Customer Experience

**Date:** Today’s date

**Subject:** Spreadsheet for end of month meeting

Good afternoon

Thank you for all your great work so far.

I would now like you to create a spreadsheet that shows the number of customers who travelled on each of our five flight route during the month of May. Create the spreadsheet in landscape orientation and ensure everything fits on one page. Please be sure to include a pie chart showing the percentages of each flight route (this should you inserted to the right of the data). This spreadsheet will be handed out to all staff at our end of month meeting. I shall email you the data and figures to include in your spreadsheet.

Be sure to check the Plan2go Style Guide for formatting requirements.

Please email your completed spreadsheet to me by close of business tomorrow.

Once I have received your completed spreadsheet and believe no edits are required, I will ask you to print 100 copies in colour to be handed out at the meeting.

Please call us on 0491 xxx xxx if you need any more information.

Thanks you in advance

Di Cormack

Leader Customer Experience

What is the purpose of the spreadsheet?

Who is the spreadsheets being created for (audience)?

What presentation requirements would you need to follow if you were producing this spreadsheet?

How could you ensure the spreadsheet was consistent with other spreadsheets created by the organisation?

### Spreadsheet options

While Microsoft Excel [i](https://www.microsoftstore.com/store/msaus/en_AU/pdp/productID.324170700?s_kwcid=AL!4249!3!101790743477!e!!g!!microsoft%20excel&WT.mc_id=pointitsem+Google+Adwords+Excel+-+EN&ef_id=V1o4IwAABNGfB-gt:20160908015455:s)s hugely popular and fairly standard across most businesses, there are alternatives. Some of these alternatives are online and free, like [Google sheets f](http://docs.google.com/)or example. Others are specific to one computer operating system, like Apple’s [iWork.](http://www.apple.com/iwork/) Most offer the option to export into different file formats so they can be used across other spreadsheet applications.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 3: Identify software

Identify the spreadsheet application and version you are currently using.

Application: Version:

Topic 2

Planning your

spreadsheet

design

# Topic 2 – Planning your spreadsheet design

## Spreadsheet purpose, audience and information required

When planning the design of your spreadsheet, it is very important to make sure that the design of the spreadsheet suits the purpose, audience and information requirements of the task, as discussed in Topic 1.

If the spreadsheet is going to be handed out, it is important to make sure it will look good when printed out. If it will be printed in colour, ensure the colours are consistent with the colour theme of the organisation’s branding. If it will be printed in black and white (monochrome), ensure that shading is used appropriately so that the spreadsheet is easy to read.

Always check if a template exists prior to creating spreadsheets as these may save you time.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 4: Spreadsheet plan

Complete the following *Spreadsheet Document* Plan using the information provided to you in the memo from Di Cormack from Plan2go in Activity 2. Do not forget to sketch how your completed spreadsheet will look.

Be sure to review the Style Guide extract on page 14 of this Student Workbook for BSBITU314.

**Spreadsheet Document Plan**

Spreadsheet purpose:

Spreadsheet audience:

Organisation requirements (as per Style Guide):

Task requirements:

Sketch:

## Getting started with Excel

You should already be familiar with the Microsoft Excel environment. For this unit, you will be accessing videos and challenge activities on the GCF Global website. There are links to the videos provided with this workbook. The GCF Global website works best with **Google** **Chrome**.

If you are working from a hard copy of this student workbook, use the following instructions to access the videos. You will need access to a computer and the internet.

1. Go to the GCF Global website: <https://edu.gcfglobal.org/en/>.
2. Click on the **Technology** link:

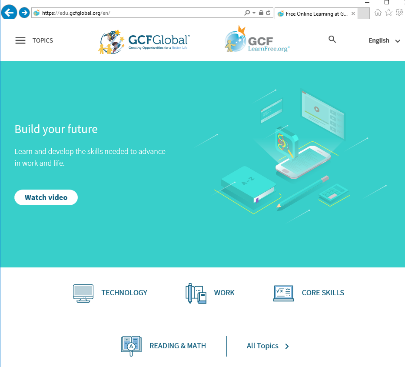


Figure -Copied under s113P, GCF Gobal Technology image <https://edu.gcfglobal.org/en/> accessed 09/08/19.

Click on the **Excel 2016** link in the Office 2016 section:

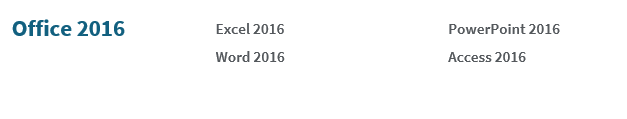


Figure - GCF Global - Office 2016 image

### Excel basics

To familiarise yourself with the basic Excel options, navigate to the [**Excel Basics**](https://edu.gcfglobal.org/en/excel/), scroll down and click on the links to revise the following:

URL *https://edu.gcfglobal.org/en/excel/*

|  |  |
| --- | --- |
| * The Excel interface (screen) | * Ribbon |
| * Quick Access Toolbar (QAT) | * Tell me feature (Help) |
| * Ruler | * Backstage view |
| * Document views | * Zoom |
| * One Drive | * Save and Save as |
| * Create new workbook | * Create new workbooks from templates |
| * Open an existing spreadsheet | * Compatibility Mode |
| * Pin a document | * Change the default save location |
| * Auto recover | * Exporting workbooks |

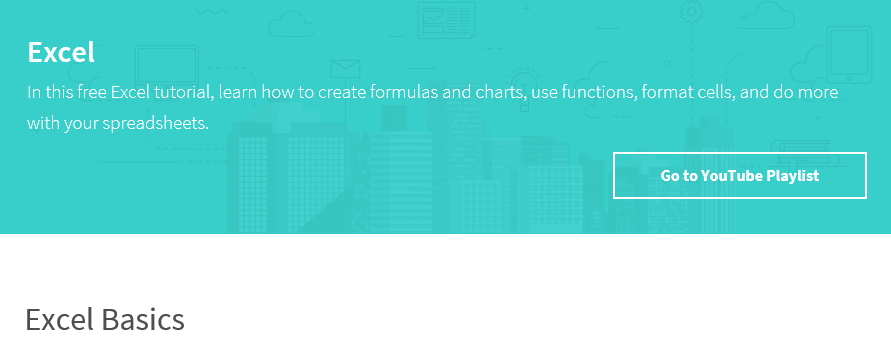


Figure - Copied under s113P, GCF Gobal Technology image <https://edu.gcfglobal.org/en/> accessed 09/08/19.

You can **watch the Videos** to become more familiar with Excel.

OR

[Click on link to go to playlist](https://www.youtube.com/watch?v=lgIWIPDJuPo&list=PLpQQipWcxwt-zyMUSRc4VBBs91biCcBo4)

You can go to the **YouTube Playlist** and watch videos on:

* [Excel: Getting Started](https://www.youtube.com/watch?v=lgIWIPDJuPo&list=PLpQQipWcxwt_wKeFEmZL15qOZEkiVUQAq&index=4&t=0s)
* [Excel: Creating and Opening Workbooks](https://www.youtube.com/watch?v=EBGrJckHadw&list=PLpQQipWcxwt_wKeFEmZL15qOZEkiVUQAq&index=4)
* [Excel: Saving and sharing](https://www.youtube.com/watch?v=IwSC5LUm5HE&list=PLpQQipWcxwt_wKeFEmZL15qOZEkiVUQAq&index=5)

Topic 3

Creating your

spreadsheets

# Topic 3 – Creating your spreadsheets

### Cell basics

To familiarise yourself with the cells and sheets, navigate to [**Cell Basics**](https://edu.gcfglobal.org/en/excel/cell-basics/1/), scroll down and click on the links to revise the following:

URL *https://edu.gcfglobal.org/en/excel/cell-basics/1/*

|  |  |
| --- | --- |
| * Understanding cells | * Select a cell |
| * Select a cell range | * Insert content |
| * Delete cell content | * Delete cells |
| * Copy and paste cell content | * Cut and paste cell content |
| * Drag and drop cells | * Fill handle |
| * Modify columns and rows | * Inserting, deleting, moving and hiding |
| * Wrapping text and merging cells | * Change font |
| * Cell borders and fill colour | * Cell styles |
| * Text alignment | * Format painter |
| * Number formats | * Multiple worksheets |
| * Grouping and ungrouping worksheets | * Find and replace |
| * Spelling | * Printing a workbook |
| * Print active sheets | * Print entire workbook |
| * Print a selection | * Adjusting content |
| * Print titles | * Page breaks |

You can **watch the videos** to learn the basics of working with cells and sheets in Excel

**You can access YouTube and watch videos on:**

* [Excel: Cell Basics](https://edu.gcfglobal.org/en/excel/cell-basics/1/)
* [Excel: Modifying columns, rows and cells](https://edu.gcfglobal.org/en/excel/modifying-columns-rows-and-cells/1/)
* [Excel: Formatting cells](https://edu.gcfglobal.org/en/excel/formatting-cells/1/)
* [Excel: Understanding number formats](https://edu.gcfglobal.org/en/excel/understanding-number-formats/1/)
* [Excel: Working with multiple worksheets](https://edu.gcfglobal.org/en/excel/working-with-multiple-worksheets/1/)
* [Excel: Using find and replace](https://edu.gcfglobal.org/en/excel/using-find-replace/1/)
* [Excel: Checking spelling](https://edu.gcfglobal.org/en/excel/checking-spelling/1/)
* [Excel: Page layout and printing](https://edu.gcfglobal.org/en/excel/page-layout-and-printing/1/)

**Optional**: You can download the practice document and do the **Challenge! Tasks**.

### Formulas and functions

For an introduction to formulas and functions options, navigate to [Intro to formulas](https://edu.gcfglobal.org/en/excel/intro-to-formulas/1/), scroll down and click on the links for the following:

URL [*https://edu.gcfglobal.org/en/excel/intro-to-formulas/1/*](https://edu.gcfglobal.org/en/excel/intro-to-formulas/1/)

|  |  |
| --- | --- |
| * Mathematical operators | * Cell references |
| * Create a formula | * Modifying values with cell references |
| * Formula using point-and-click method | * Fill handle |
| * Edit a formula | * Order of operations |
| * Complex formulas | * Relative and absolute references |
| * Cell references with multiple worksheets | * Parts of a function |
| * Working with arguments | * Creating a function |
| * Autosum | * Enter a function manually |
| * Function library | * Insert function command |

### Working with data (optional learning)

For an introduction to working with data, navigate to [Basic tips for working with data](https://edu.gcfglobal.org/en/excel/basic-tips-for-working-with-data/1/), scroll down and click on the links for the following:

URL *https://edu.gcfglobal.org/en/excel/basic-tips-for-working-with-data/1/*

|  |  |
| --- | --- |
| * Freezing rows and columns | * Sorting data |
| * Filtering data | * Summarizing data |
| * Formatting data as a table | * Visualizing data with charts |
| * Adding conditional formatting | * Freeze rows |
| * Freeze columns | * Other view options |
| * Split a worksheet | * Sorting data |
| * Group and subtotals | * Tables |
| * Charts | * Conditional formatting |

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 5: Creating a spreadsheet

Following her memo in Activity 2, Di Cormack, your supervisor at Plan2go has now emailed you the data to create your spreadsheet. Be sure to review the Style Guide extract on page 14 of this Student Workbook for BSBITU314.

**EMAIL**

**To:** <Your name>

**From:** Di Cormack – Leader Customer Experience

**Date:** Today’s date

**Subject:** Spreadsheet for end of month meeting

Good morning

I hope you are well.

Following the memorandum I sent you, please find the data to create your spreadsheet.

Sydney to Albury – 154 passengers

Sydney to Ballina – 307 passengers

Sydney to Brisbane – 811 passengers

Sydney to Gold Coast – 756 passengers

Sydney to Melbourne – 948 passengers

I would now like you to create a spreadsheet that shows the number of customers who travelled on each of our five flight route during the month of May. Create the spreadsheet in landscape orientation and ensure everything fits on one page. This spreadsheet will be handed out to all staff at our end of month meeting.

I have checked the Plan2go Style Guide for formatting requirements for you. The formatting requirements are as follows:

- Plan2go logo to be inserted at the top right of the spreadsheet

- The top row must be merged and contain the organisation’s name (Plan2go) formatted in

Font - Arial in Size - 16pt in bold

- The second row must be merged and explain the content of the spreadsheet, formatted, in

Font - Arial in Size - 12pt

- The remainder of the spreadsheet is to be formatted in Font - Arial in Size – 12pt

Please save your spreadsheet as: **Plan2go\_Flight\_Routes\_May\_v1**.

Please email your completed spreadsheet to me by close of business tomorrow.

Once I have received your completed spreadsheet and believe no edits are required, I will ask you to print 100 copies in colour to be handed out at the meeting.

Please call us on 0491 xxx xxx if you need any more information.

Thanks you in advance

Di Cormack

Leader Customer Experience

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 6: Amending a spreadsheet

Your supervisor, Di Cormack, has just sent you another email to advise a correction in passenger figures. Please read her email and update your spreadsheet accordingly. Be sure to review the Style Guide extract on page 14 of this Student Workbook for BSBITU314.

**EMAIL**

**To:** <Your name>

**From:** Di Cormack – Leader Customer Experience

**Date:** Today’s date

**Subject:** Spreadsheet for end of month meeting – revised passenger numbers

Good afternoon

Thank you for the work you have completed so far.

Some of the figures I sent in my previous email were incorrect. Please update your spreadsheet accordingly. The changes are in bold.

Sydney to Albury – **158** passengers

Sydney to Ballina – 307 passengers

Sydney to Brisbane – **817** passengers

Sydney to Gold Coast – 756 passengers

Sydney to Melbourne – **968** passengers

Please update the previous spreadsheet and save your updated spreadsheet as:

**Plan2go\_ Flight\_Routes \_May\_v2**.

Please email your completed spreadsheet to me by close of business tomorrow.

Once I have received your completed spreadsheet and believe no edits are required, I will ask you to print 100 copies in colour to be handed out at the meeting.

Please call us on 0491 xxx xxx if you need any more information.

Thanks you in advance

Di Cormack

Leader Customer Experience

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 7: Adding functions to a spreadsheet

Your supervisor, Di Cormack, would now like you to add a new sheet to your workbook to show the airfare payable for each flight route to your spreadsheet. She would also like you to insert a formula to calculate the GST, then calculate the total airfare including GST. Please read her email below and update your spreadsheet accordingly. Be sure to review the Style Guide extract on page 14 of this Student Workbook for BSBITU314.

**EMAIL**

**To:** <Your name>

**From:** Di Cormack – Leader Customer Experience

**Date:** Today’s date

**Subject:** Spreadsheet for end of month meeting – airfares and GST formulas

Good afternoon

Your spreadsheet looks great so far – well done.

In a new worksheet in the same Excel workbook, please add the following data to show the airfares payable for each flight route.

Sydney to Albury – $80 excluding GST

Sydney to Ballina – $110 excluding GST

Sydney to Brisbane – $90 excluding GST

Sydney to Gold Coast – $100 excluding GST

Sydney to Melbourne – $90 excluding GST

Once inserted, add another column to calculate the GST payable for each flight route (be sure to use an absolute formula – to do so, I suggest that you insert the GST amount of 10% to a cell at the top of your worksheet).

Once the GST is calculated, add an additional column to display the airfare including GST, for each flight route. Check all formulas work correctly by using a calculator for accuracy.

Please update the previous spreadsheet and save your updated spreadsheet as:

**Plan2go\_ Flight\_Routes \_May\_v3**.

Please email your completed spreadsheet to me by close of business tomorrow.

Once I have received your completed spreadsheet and believe no edits are required, I will ask you to print 100 copies in colour to be handed out at the meeting.

Please call us on 0491 xxx xxx if you need any more information.

Thanks you in advance

Di Cormack

Leader Customer Experience

Topic 4

Creating charts

# Topic 4 – Creating charts

### Charts

To familiarise yourself with the charts, navigate to [**Charts**](https://edu.gcfglobal.org/en/excel/charts/1/), scroll down and click on the links to revise the following:

URL *https://edu.gcfglobal.org/en/excel/charts/1/*

|  |  |
| --- | --- |
| * Understanding charts | * Insert a chart |
| * Chart and layout style | * Other chart options |
| * Switch row and column data | * Change the chart style |
| * Move a chart | * Keeping charts up to date |

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 8: Adding charts

Di Cormack’s original memo (Activity 2) advised that you would be required to add a pie chart to your spreadsheet. You are now ready to go ahead and add your chart.

Select the appropriate data to create a pie chart to show what percentage of passengers travelling on each flight route (based on passenger numbers). This chart should be inserted to the right of the data.

Ensure the chart title follows the organisation’s Style Guide requirements.

Once inserted, save your updated spreadsheet as: **Plan2go\_ Flight\_Routes \_May\_v4**.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 9: Moving charts

Once you have completed Activity 8, move your chart to a new worksheet and choose an appropriate Sheet Name for the new worksheet in your workbook.

Once moved, save your updated spreadsheet as: **Plan2go\_ Flight\_Routes \_May\_v5**.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 10: Modifying charts

On completion of Activity 9, add a data label (as percentages) to the inside end of your pie chart and modify the chart to be a 3-d pie chart.

Once modified, save your updated spreadsheet as: **Plan2go\_ Flight\_Routes \_May\_v6**.

Topic 5

Presenting your

spreadsheets

# Topic 5 – Presenting your spreadsheets

Prior to presenting your completed spreadsheet, it is important to review and make any final edits to your spreadsheet. It is important to do so prior to printing and/or sending your completed spreadsheet to users.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 11: Reviewing and edit final spreadsheet

Refer to the Plan2go organisational requirements for your spreadsheet (on page 14 of this workbook) to ensure that your spreadsheet meets all of the requirements.

Make any amendments that are needed. Hint: Pay attention to the Chart Style.

When you are happy with your finalised spreadsheet, save your updated spreadsheet as: **Plan2go\_ Flight\_Routes \_May\_v7**.

|  |  |
| --- | --- |
|  | Practice activity |

## Activity 12: Deliver spreadsheet to your audience

Refer back to the memorandum from Activity 2 (on page 15).

Who does the finalised spreadsheet need to be provided to?

Once your spreadsheet is approved, what is the final task you need to complete?