❖ **General Description**

This publication has been mapped to the **BSBITU402A - Develop And Use Complex Spreadsheets** competency and is designed to act as a learning guide covering the technical aspects of the competency. It is primarily designed for people who need to know how to use Microsoft Excel to develop automated and linked workbook solutions.

❖ **Learning Outcomes**

At the completion of this course you should be able to:

- create more complex formulas and functions
- work with logical function in *Excel*
- use maths functions
- use a variety of *Financial* functions
- use a variety of financial functions
- use the date and time functions to perform calculations
- use a range of lookup and reference functions
- use a range of techniques to work with worksheets
- understand and create simple *PivotTables*
- create and edit a *PivotChart*
- use and format a range of elements and features to enhance charts
- apply a variety of page setup techniques
- import data into *Excel* and export data from *Excel*
- create and use templates in *Microsoft Excel*
- create recorded macros in *Excel*
- use the macro recorder to create a variety of macros
- work safely with your computer, consider your impact on the environment and manage files and folders efficiently

❖ **Prerequisites**

BSBITU402A Develop And Use Complex Spreadsheets assumes some knowledge of Microsoft Excel 2013, as well as a general understanding of personal computers and the Windows operating system environment.

❖ **Topic Sheets**

274 topics

❖ **Methodology**

The InFocus series of publications have been written with one topic per page. Topic sheets either contain relevant reference information, or detailed step-by-step instructions designed on a real-world case study scenario. Publications can be used for instructor-led training, self-paced learning, or a combination of the two.

❖ **Formats Available**

A4 Black and White, A5 Black and White (quantity order only), A5 Full Colour (quantity order only), Electronic Licence

❖ **Companion Products**

There are a number of complementary titles in the same series as this publication. Information about other relevant publications can be found on our website at **www.watsoniapublishing.com**.

This information sheet was produced on Tuesday, April 28, 2015 and was accurate at the time of printing. Watsonia Publishing reserves its right to alter the content of the above courseware without notice.

Product Information

Contents

Counting in a PivotTable
Formatting PivotTable Values
Working With PivotTable Grand Totals
Working With PivotTable Subtotals
Finding the Percentage of Total
Finding the Difference From
Grouping in PivotTable Reports
Creating Running Totals
Creating Calculated Fields
Providing Custom Names
Creating Calculated Items
PivotTable Options
Sorting in a PivotTable
Practice Exercise
Practice Exercise Sample

PivotCharts
Inserting a PivotChart
Defining the PivotChart Structure
Changing the PivotChart Type
Using the PivotChart Filter Field Buttons
Moving PivotCharts to Chart Sheets
Practice Exercise
Practice Exercise Sample

Charting Techniques
Understanding Chart Elements
Adding a Chart Title
Adding Axes Titles
Repositioning the Legend
Showing Data Labels
Showing Gridlines
Formatting the Chart Area
Adding a Trendline
Adding Error Bars
Adding a Data Table
Practice Exercise
Practice Exercise Sample
Understanding Chart Formatting
Selecting Chart Objects
Using Shape Styles
Changing Column Colour Schemes
Changing the Colour of a Series
Changing Line Chart Colours
Using Shape Effects
Colouring the Chart Background
Understanding the Format Pane
Using the Format Pane
Exploding Pie Slices
Changing Individual Bar Colours

Practice Exercise
Practice Exercise Sample

Page Setup
Strategies for Printing Worksheets
Understanding Page Layout
Using Built in Margins
Setting Custom Margins
Changing Margins by Dragging
Centring on a Page
Changing Orientation
Specifying the Paper Size
Setting the Print Area
Clearing the Print Area
Inserting Page Breaks
Using Page Break Preview
Removing Page Breaks
Setting a Background
Clearing the Background
Settings Rows as Repeating Print Titles
Clearing Print Titles
Printing Gridlines
Printing Headings
Scaling to a Percentage
Fit to a Specific Number of Pages
Practice Exercise
Practice Exercise Sample

Importing and Exporting
Understanding Data Importing
Importing From an Earlier Version
Understanding Text File Formats
Importing Tab Delimited Text
Importing Comma Delimited Text
Importing Space Delimited Text
Importing Access Data
Working With Connected Data
Unlinking Connections
Exporting to Microsoft Word
Exporting Data as Text
Practice Exercise
Practice Exercise Sample

Templates
Creating a Template
Using a Template
Modifying a Template
Practice Exercise
Practice Exercise Sample

Recorded Macros
Understanding Excel Macros
Setting Macro Security
Saving a Document as Macro Enabled
Recording a Simple Macro
Running a Recorded Macro
Relative Cell References
Running a Macro With Relative References
Viewing a Macro
Editing a Macro
Assigning a Macro to the Toolbar
Running a Macro From the Toolbar
Assigning a Macro to the Ribbon
Assigning a Keyboard Shortcut to a Macro
Deleting a Macro
Copying a Macro
Practice Exercise
Practice Exercise Sample

Recorder Workshop
Preparing Data for an Application
Recording a Summation Macro
Recording Consolidations
Recording Divisional Macros
Testing Macros
Creating Objects to Run Macros
Assigning a Macro to an Object
Practice Exercise
Practice Exercise Sample

General Computer Operation
Setting Up an Ergonomic Workstation
Breaks and Exercises
Reducing Paper Wastage
Environmentally Friendly Computing
Backup Procedures
Practice Exercise
Practice Exercise Workspace
Understanding How Help Works
Accessing the Help Window
Navigating the Help Window
Using the Office Website for Help
Using Google to Get Help
Printing a Help Topic
Other Sources of Assistance
Practice Exercise
Practice Exercise Workspace

Product Information

Unit Mapping

This unit describes the performance outcomes, skills and knowledge required to use spreadsheet software to complete business tasks and to produce complex worksheets.

	Performance Criteria	Location
1	**Prepare to develop spreadsheet**	
1.1	Organise personal work environment in accordance with ergonomic requirements	Chapter 17: General Computer Operation
1.2	Analyse task and determine specifications for spreadsheets	Generally assumed throughout
1.3	Identify organisational and task requirements in relation to data entry, storage, output, reporting and presentation requirements	Generally assumed throughout
1.4	Apply work organisation strategies and energy and resource conservation techniques to plan work activities	Chapter 17: General Computer Operation
2	**Develop a linked spreadsheet solution**	
2.1	Utilise spreadsheet design software functions and formulae to meet identified requirements	Chapter 1: Complex Formulas, Chapter 2: Logical Functions, Chapter 3: Maths Functions, Chapter 4: Statistical Functions, Chapter 5: Financial Functions, Chapter 6: Date and Time Functions, Chapter 7: Lookup Functions, Chapter 8: Worksheet Techniques
2.2	Link spreadsheets in accordance with software procedures	Chapter 8: Worksheet Techniques, Chapter 9: PivotTables, Chapter 10: PivotCharts
2.3	Format cells and use data attributes assigned with relative and/or absolute cell references, in accordance with the task specifications	Chapter 1: Complex Formulas
2.4	Test formulae to confirm output meets task requirements	Generally assumed throughout
3	**Produce simple charts**	
3.1	Evaluate tasks to identify those where automation would increase efficiency	Chapter 16: Recorder Workshop
3.2	Create, use and edit macros to fulfil the requirements of the task and automate spreadsheet operation	Chapter 15: Recorded Macros, Chapter 16: Recorder Workshop
3.3	Develop, edit and use templates to ensure consistency of design and layout for forms and reports, in accordance with organisational requirements	Chapter 14: Templates
4	**Automate and standardise spreadsheet operation**	
4.1	Enter, check and amend data in accordance with organisational and task requirements	Generally assumed throughout, Chapter 1: Complex Formulas, Chapter 2: Logical Functions, Chapter 3: Maths Functions, Chapter 4: Statistical Functions, Chapter 5: Financial Functions, Chapter 6: Date and Time Functions, Chapter 7: Lookup Functions
4.2	Import and export data between compatible spreadsheets and adjust host documents, in accordance with software and system procedures	Chapter 13: Importing and Exporting
4.3	Use manuals, user documentation and online help to overcome problems with spreadsheet design and production	Chapter 17: General Computer Operation
4.4	Preview, adjust and print spreadsheet in accordance with organisational and task requirements	Chapter 12: Page Setup
4.5	Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss or damage	Generally assumed throughout
5	**Represent numerical data in graphic form**	
5.1	Determine style of graph to meet specified requirements and manipulate spreadsheet data if necessary to suit graph requirements	Chapter 11: Charting Techniques
5.2	Create graphs with labels and titles from numerical data contained in a spreadsheet file	Chapter 9: PivotTables, Chapter 11: Charting Techniques
5.3	Save, view and print graph within designated time lines	Chapter 9: PivotTables, Chapter 11: Charting Techniques

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