



INFOCUS COURSEWARE

BSBITU314 Design And Produce Spreadsheets

Microsoft Excel 2016



WATSONIA PUBLISHING

Product Code: INF1846

ISBN: 978-1-925873-23-8

❖ General Description

This publication has been mapped to the **BSBITU314 - Design And Produce Spreadsheets** competency. It applies to individuals employed in a range of environments who tend to be personally responsible for designing and working with spreadsheets under minimal supervision.

❖ Learning Outcomes

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

- understand some of the key underlying concepts of spreadsheets
- understand points to consider to avoid problems in your worksheets
- navigate your way around **Microsoft Excel 2016**
- create and work with a new workbook
- understand and work with ranges in a worksheet
- understand, create and work with formulas and functions
- copy and paste data in **Excel**
- make changes to data in a workbook
- understand and use formula cell referencing
- use font formatting techniques
- understand and use the number formatting features in **Excel**
- apply conditional formatting to ranges in a worksheet
- work with elements that make up the structure of a worksheet
- align the contents of cells in a number of ways
- save workbooks in a variety of formats
- print your workbook data
- apply a variety of page setup techniques
- create and work with headers and footers
- create effective charts in **Microsoft Excel**
- use a range of elements and features to enhance charts
- obtain help for **Excel** whenever you need it

❖ Prerequisites

BSBITU314 Design And Produce Spreadsheets assumes little or no knowledge of Microsoft Excel 2016. However, it would be beneficial to have a general understanding of personal computers and the Windows operating system environment.

❖ Topic Sheets

244 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



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❖ 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.

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Contents

Spreadsheets

- How Spreadsheets Work
- The Characteristics of a Spreadsheet
- What a Spreadsheet Can Do
- The Appropriateness of Spreadsheets
- Choosing Spreadsheet Software
- Challenge Exercise
- Challenge Exercise Workspace

A Guide to Brilliant Spreadsheets

- Meeting Organisational Requirements
- Good Planning Is Essential
- Organisation and Design
- Writing Effective Formulas
- Documented and Easy to Use
- The Appropriateness of Spreadsheets

Getting to Know Excel 2016

- Starting Excel From the Desktop
- Understanding the Excel Start Screen
- The Excel Workbook Screen
- How Excel 2016 Works
- Using the Ribbon
- Using Ribbon Key Tips
- Showing and Collapsing the Ribbon
- Understanding the Backstage View
- Accessing the Backstage View
- Using Shortcut Menus
- Understanding Dialog Boxes
- Launching Dialog Boxes
- Understanding the Quick Access Toolbar
- Adding Commands to the QAT
- Understanding the Status Bar
- Exiting Safely From Excel 2016
- Challenge Exercise
- Challenge Exercise Workspace

Creating a New Workbook

- Understanding Workbooks
- Using the Blank Workbook Template
- Typing Text
- Typing Numbers
- Typing Dates
- Understanding the Fill Handle
- Typing Formulas
- Easy Formulas

- Saving a New Workbook on Your Computer
- Checking the Spelling
- Making Basic Changes
- Printing a Worksheet
- Safely Closing a Workbook
- Challenge Exercise
- Challenge Exercise Sample

Selecting Ranges

- Understanding Cells and Ranges
- Selecting Contiguous Ranges
- Selecting Non Contiguous Ranges
- Using Special Selection Techniques
- Selecting Larger Ranges
- Selecting Rows
- Selecting Columns
- Challenge Exercise
- Challenge Exercise Sample

Formulas and Functions

- Understanding Formulas
- Creating Formulas That Add
- Creating Formulas That Subtract
- Formulas That Multiply and Divide
- Understanding Functions
- Using the SUM Function to Add
- Summing Non-Contiguous Ranges
- Calculating an Average
- Finding a Maximum Value
- Finding a Minimum Value
- Creating More Complex Formulas
- What if Formulas
- Common Error Messages
- Challenge Exercise
- Challenge Exercise Sample

Copying Data

- Using Fill for Quick Copying
- Copying From One Cell to Another
- Copying From One Cell to a Range
- Copying From One Range to Another
- Copying Relative Formulas
- Copying to a Non-Contiguous Range
- Copying to Another Worksheet
- Copying to Another Workbook
- Challenge Exercise
- Challenge Exercise Sample

Editing in a Workbook

- Understanding Data Editing
- Overwriting Cell Contents
- Editing Longer Cells
- Editing Formulas
- Clearing Cells
- Deleting Data
- Using Undo and Redo
- Challenge Exercise
- Challenge Exercise Sample

Formula Referencing

- Absolute Versus Relative Referencing
- Relative Formulas
- Problems With Relative Formulas
- Creating Absolute References
- Creating Mixed References
- Challenge Exercise
- Challenge Exercise Sample

Font Formatting

- Understanding Font Formatting
- Working With Live Preview
- Changing Fonts
- Changing Font Size
- Growing and Shrinking Fonts
- Making Cells Bold
- Italicising Text
- Underlining Text
- Changing Font Colours
- Changing Background Colours
- Using the Format Painter
- Applying Strikethrough
- Subscripting Text
- Superscripting Text
- Challenge Exercise
- Challenge Exercise Sample

Number Formatting

- Understanding Number Formatting
- Applying General Formatting
- Formatting for Money
- Formatting Percentages
- Formatting as Fractions
- Formatting as Dates
- Using the Thousands Separator
- Increasing and Decreasing Decimals
- Challenge Exercise
- Challenge Exercise Sample



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Conditional Formatting

- Understanding Conditional Formatting
- Formatting Cells Containing Values
- Clearing Conditional Formatting
- More Cell Formatting Options
- Top Ten Items
- More Top and Bottom Formatting Options
- Working With Data Bars
- Working With Colour Scales
- Working With Icon Sets
- Understanding Sparklines
- Creating Sparklines
- Editing Sparklines
- Challenge Exercise
- Challenge Exercise Sample

Working With a Worksheet

- Understanding Worksheets
- Changing the Worksheet View
- Worksheet Zooming
- Inserting Cells Into a Worksheet
- Deleting Cells From a Worksheet
- Inserting Columns Into a Worksheet
- Deleting Rows and Columns
- Challenge Exercise
- Challenge Exercise Sample

Cell Alignment

- Understanding Cell Alignment
- Aligning Right
- Aligning Left
- Aligning Top
- Aligning Bottom
- Aligning to the Middle
- Challenge Exercise
- Challenge Exercise Sample

Saving Workbooks

- Understanding the Windows Filing Structure
- Understanding Naming Conventions
- Understanding Version Compatibility
- Saving With a Different Name
- Saving in Another Location
- Saving in Another Version
- Saving as a Template
- Saving as Macro Enabled
- Challenge Exercise
- Challenge Exercise Sample

Printing

- Understanding Printing
- Previewing Before You Print
- Selecting a Printer

Page Setup

- Using Built in Margins
- Centring on a Page
- Changing Orientation
- Specifying the Paper Size
- Setting the Print Area
- Inserting Page Breaks
- Using Page Break Preview
- Setting a Background
- Settings Rows as Repeating Print Titles
- Scaling to a Percentage
- Fit to a Specific Number of Pages
- Challenge Exercise
- Challenge Exercise Sample

Headers and Footers

- Understanding Headers and Footers
- Adding a Quick Header
- Adding a Quick Footer
- Switching Between Headers and Footers
- Challenge Exercise
- Challenge Exercise Data

Creating Charts

- Understanding the Charting Process
- Choosing the Right Chart
- Using a Recommended Chart
- Creating a New Chart From Scratch
- Working With an Embedded Chart
- Resizing a Chart
- Repositioning a Chart
- Printing an Embedded Chart
- Creating a Chart Sheet
- Changing the Chart Type
- Changing the Chart Layout
- Changing the Chart Style
- Printing a Chart Sheet
- Embedding a Chart Into a Worksheet
- Deleting a Chart
- Challenge Exercise
- Challenge Exercise Sample

Chart Elements

- 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
- Challenge Exercise
- Challenge Exercise Sample

Getting Help

- Understanding How Help Works
- Using Tell Me
- Accessing the Help Window
- Navigating the Help Window
- Using Google to Get Help
- Printing a Help Topic
- Other Sources of Assistance
- Challenge Exercise
- Challenge Exercise Workspace



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Unit Mapping

This unit describes the skills and knowledge required to develop spreadsheets through the use of spreadsheet software.

| | Performance Criteria | Location |
|----------|---|--|
| 1 | Select and prepare resources | |
| 1.1 | Identify spreadsheet task purpose and audience | Generally assumed throughout, Chapter 1: Spreadsheets, Chapter 2: A Guide to Brilliant Spreadsheets |
| 1.2 | Identify spreadsheet task requirements in relation to data entry, storage, output and presentation format | Generally assumed throughout, Chapter 1: Spreadsheets, Chapter 4: Creating a New Workbook, Chapter 15: Saving Workbooks, Chapter 16: Printing |
| 1.3 | Select most appropriate application to produce spreadsheet, in accordance with available resources and organisational policies | Chapter 1: Spreadsheets |
| 2 | Plan spreadsheet design | |
| 2.1 | Ensure spreadsheet design suits purpose, audience and information requirements of task | Chapter 1: Spreadsheets |
| 2.2 | Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout | Chapter 1: Spreadsheets, Chapter 4: Creating a New Workbook, Chapter 10: Font Formatting, Chapter 11: Number Formatting, Chapter 12: Conditional Formatting, Chapter 13: Working With a Worksheet, Chapter 14: Cell Alignment, Chapter 15: Saving Workbooks, Chapter 16: Printing, Chapter 17: Page Setup, Chapter 18: Headers and Footers |
| 2.3 | Use available application functions to ensure consistency of design and layout, adhering to organisational and task requirements | Chapter 13: Working With a Worksheet, Chapter 14: Cell Alignment, Chapter 15: Saving Workbooks, Chapter 12: Conditional Formatting, Chapter 11: Number Formatting, Chapter 10: Font Formatting, Chapter 16: Printing, Chapter 17: Page Setup, Chapter 18: Headers and Footers |
| 3 | Create spreadsheet | |
| 3.1 | Enter data, check and amend to maintain consistency of design and layout, in accordance with organisational and task requirements | Chapter 4: Creating a New Workbook |
| 3.2 | Format spreadsheet using application functions to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements | Chapter 10: Font Formatting, Chapter 11: Number Formatting, Chapter 12: Conditional Formatting, Chapter 13: Working With a Worksheet, Chapter 14: Cell Alignment, Chapter 15: Saving Workbooks |
| 3.3 | Ensure formulae are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required | Chapter 4: Creating a New Workbook, Chapter 5: Selecting Ranges, Chapter 6: Formulas and Functions, Chapter 7: Copying Data, Chapter 8: Editing in a Workbook, Chapter 9: Formula Referencing |
| 3.4 | Use relevant help functions to overcome intermediate-level issues with spreadsheet design and production | Chapter 21: Getting Help |
| 4 | Produce intermediate-level charts | |
| 4.1 | Select chart type and design that offers analysis of numerical data, and meets organisational and task requirements | Chapter 19: Creating Charts, Chapter 20: Chart Elements |
| 4.2 | Create charts using appropriate data range in spreadsheet | Chapter 19: Creating Charts, Chapter 20: Chart Elements |
| 4.3 | Modify chart type and layout using formatting features, adhering to organisational and task requirements | Chapter 19: Creating Charts, Chapter 20: Chart Elements |
| 5 | Finalise spreadsheets | |
| 5.1 | Review and edit final spreadsheet and any accompanying charts, and prepare for delivery in accordance with task requirements | Chapter 19: Creating Charts, Chapter 20: Chart Elements, Chapter 16: Printing, Chapter 17: Page Setup, Chapter 18: Headers and Footers |
| 5.2 | Deliver document to relevant audience within designated timelines and in accordance with organisational requirements for speed and accuracy | Generally assumed throughout |
| 5.3 | Name and store spreadsheet in accordance with organisational requirements and exit the application without data loss/damage | BGC1604, Chapter 13: Working With a Worksheet, Chapter 14: Cell Alignment, Chapter 15: Saving Workbooks |



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