

<b>Title</b>	<b>Produce a spreadsheet for organisational use</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	<p>People credited with this unit standard are able to produce a spreadsheet for organisational use.</p> <p>This unit standard has been developed primarily for assessment within programmes leading to the New Zealand Certificate in Computing (Intermediate User) (Level 3) [Ref: 2592].</p>
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<b>Classification</b>	Computing > Generic Computing
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 Recommended skills and knowledge:  
*Unit 29770, Use the main features and functions of a spreadsheet application for a purpose; or demonstrate equivalent knowledge and skills.*
- 2 Assessment, where applicable, will be conducted in and for the context of real or realistic organisations and/or settings, and be relevant to current and/or emerging practice. The assessor may gather evidence over time from a range of scenarios rather than using one assessment where the learner has to demonstrate all of the required skills.
- 3 A brief will be supplied to the learner, either as part of the learner's employment (in the case of workplace assessment) or in response to a set task. Data files and/or unformatted text for use in the spreadsheet/workbooks may also be provided. A *brief* is defined as a clear description of both the desirable outcomes sought and the constraints to be met by the solution, and will include meeting appropriate legal, ethical and moral considerations. It contains requirements against which the success or otherwise of the spreadsheet/workbooks can be assessed, including purpose, target users, format, functions, testing. Information from the spreadsheet created in this standard could be used in Unit 29785, *Use a word processing application to integrate images, spreadsheet and database data into documents.*

Planning is not required to be assessed as part of this standard however it is good practice to develop a simple plan which outlines how the requirements of the task will be realised. A simple plan indicates such things as column, headers and format (e.g. currency, date, general, decimal points, % etc), to ensure the spreadsheet is properly and efficiently structured.

- 4 Intermediate level user spreadsheet skills refer to:  
*Functions and formulas* refer to use of time/date calculations; absolute cell referencing; logical, statistical and financial functions; mixed references in formulas; links between worksheets.  
*Formatting and editing techniques* refer to conditional formatting based on cell content; number formats; show/hide comments/notes; special paste options; inserting fields (such as file name, page number, worksheet name into footers and headers).  
*Charting* refers to different types of charts/graphs; selection of non-adjacent data; chart formatting and editing features.  
*Efficiency techniques* refer to importing delimited data from a text file; sorting techniques; filters to lists/columns; freeze/unfreeze rows and columns; creating and editing macros; tracking changes and version control features; printing and sharing features (gridlines, row and column headings, pagination); view formulas, labelling.
- 5 Definitions  
*Good practice*, in this spreadsheet context, includes selecting and using the appropriate features and functions to ensure consistent and correct use of formulas and formatting tools, such as alignment, labelling, and calculation functions, to ensure data integrity.  
*Organisation* refers to the context the spreadsheet is designed to operate in (e.g. businesses, clubs, not-for-profit organisations). It does not define or limit the situations in which assessment evidence may be gathered.  
*Testing* refers to the details of how the spreadsheet is going to be tested to ensure that it meets the specifications of the brief, stakeholder and good practice, including features, functions, expected output, validation and accessibility testing.
- 6 Legislation relevant to this unit standard includes but is not limited to the:  
Copyright Act 1994  
Copyright (New Technologies) Amendment Act 2008  
Health and Safety at Work Act 2015  
Privacy Act 2020  
and any subsequent amendments.  
Current legislation and regulations can be accessed at <http://legislation.govt.nz>.
- 7 Reference  
*ACC5637 Guidelines for Using Computers - Preventing and managing discomfort, pain and injury*. Accident Compensation Corporation - Department of Labour, 2010; available from WorkSafe New Zealand, at <https://www.worksafe.govt.nz/topic-and-industry/work-related-health/ergonomics/safely-using-computers-at-work/>.

## Outcomes and performance criteria

### Outcome 1

Produce a spreadsheet for organisational use.

Range includes – more than one active worksheet (two or more workbooks or one workbook containing two or more worksheets, which solve at least two different problems); at least 15 intermediate level spreadsheet skills, with a selection from each of – functions and formulas (must include use of time/date calculations; absolute cell referencing; two of logical, statistical or financial functions); formatting and editing techniques; charting; and efficiency techniques; in accordance with good practice.

### Performance criteria

1.1 Spreadsheet data, cell formulas, and functions are entered and formatted to produce the spreadsheet required by a given brief.

1.2 A spreadsheet template is created that allows the spreadsheet to be retrieved and modified.

1.3 Cell ranges within the spreadsheet are graphed according to the requirements of the brief.

Range at least two different types of graphs based on the spreadsheet data.

1.4 Data integrity techniques and practices are demonstrated in accordance with original source data, intended purpose and good practice.

Range techniques and practices include auditing formulas, accuracy of totals.

1.5 The worksheets are produced, checked for errors, corrected (if needed), and display accurately and clearly in hard or soft copy to meet the requirements of the brief.

1.6 The final spreadsheet is tested and confirmed as being fit for purpose in terms of meeting the purpose and requirements of the organisation within its everyday activities as outlined in the brief.

<b>Replacement information</b>	This unit standard replaced unit standard 2785.
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<b>Planned review date</b>	31 December 2026
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**Status information and last date for assessment for superseded versions**

Process	Version	Date	Last Date for Assessment
Registration	1	19 January 2017	31 December 2024
Review	2	28 April 2022	N/A

**Consent and Moderation Requirements (CMR) reference**

0099

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

**Comments on this unit standard**

Please contact Toi Mai Workforce Development Council [qualifications@toimai.nz](mailto:qualifications@toimai.nz) if you wish to suggest changes to the content of this unit standard.