**Client Name:**

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| --- | --- | --- | --- | --- |
| **Skill** | **Yes** | **No** | **Some** | **Comment** |
| **Using the Application** |
| Open, close a spreadsheet application. Open, close spreadsheet(s). |  |  |  |  |
| Create a new spreadsheet based on default template, other available template locally or online. |  |  |  |  |
| Save a spreadsheet to a location on a local, online drive. Save a spreadsheet under another name to a location on a local, online drive. |  |  |  |  |
| Save a spreadsheet as another file type like: text file, pdf, csv, software specific file extension. |  |  |  |  |
| Switch between open spreadsheets. |  |  |  |  |
| Set basic options/preferences in the application: user name, default folder to open, save spreadsheets. |  |  |  |  |
| Use available help resources. |  |  |  |  |
| Use magnification/zoom tools. |  |  |  |  |
| Display, hide built-in toolbars. Restore, minimise the ribbon. |  |  |  |  |
| Recognise good practice in navigating within a spreadsheet: use shortcuts, go to tool. |  |  |  |  |
| Use go to tool to navigate to a specific cell. |  |  |  |  |
| **Cells** |
| Understand that a cell in a worksheet should contain only one element of data, for example, quantity in one cell, description in adjacent cell. |  |  |  |  |
| Recognise good practice in creating lists: avoid blank rows and columns in the main body of list, ensure cells bordering list are blank. |  |  |  |  |
| Enter a number, date, text in a cell. |  |  |  |  |
| Select a cell, range of adjacent cells, range of non-adjacent cells, entire worksheet. |  |  |  |  |
| Edit cell contents. |  |  |  |  |
| Use the undo, redo command. |  |  |  |  |
| Use a simple search command for specific content in a worksheet |  |  |  |  |
| Use a simple replace command for specific content in a worksheet. |  |  |  |  |
| Sort a cell range by one criterion in ascending, descending numeric order, ascending, descending alphabetic order. |  |  |  |  |
| Copy the contents of a cell, cell range within a worksheet, between worksheets, between open spreadsheets. |  |  |  |  |
| Use the autofill tool/copy handle tool to copy, increment data, formula, function. |  |  |  |  |
| Move the contents of a cell, cell range within a worksheet, between worksheets, between open spreadsheets. |  |  |  |  |
| Delete cell contents. |  |  |  |  |
| Managing Worksheets |
| Select a row, range of adjacent rows, range of non-adjacent rows. |  |  |  |  |
| Select a column, range of adjacent columns, range of non-adjacent columns. |  |  |  |  |
| Insert, delete rows and columns. |  |  |  |  |
| Modify column width, row height to a specified value, to optimal width or height. |  |  |  |  |
| Freeze, unfreeze row and/or column titles. |  |  |  |  |
| Switch between worksheets. |  |  |  |  |
| Insert a new worksheet, delete a worksheet. |  |  |  |  |
| Recognise good practice in naming worksheets: use meaningful worksheet names rather than the default names. |  |  |  |  |
| Copy, move a worksheet within a spreadsheet, between spreadsheets. Rename a worksheet.  |  |  |  |  |
| Formulas and Functions |
| Recognise good practice in formula creation: use cell references rather than numbers in formulas. |  |  |  |  |
| Create formulas using cell references and arithmetic operators (addition, subtraction, multiplication, division). |  |  |  |  |
| Identify and understand standard error values associated with formulas: #NAME?, #DIV/0!, #REF!, #VALUE!. |  |  |  |  |
| Understand and use relative, absolute cell referencing in formulas. |  |  |  |  |
| Use sum, average, minimum, maximum, count, counta, round functions |  |  |  |  |
| Use the logical function if (yielding one of two specific values) with comparison operator: =, >, <.  |  |  |  |  |
| **Formatting** |
| Format cells to display numbers to a specific number of decimal places, to display numbers with, without a separator to indicate thousands. |  |  |  |  |
| Format cells to display date style, currency symbol. |  |  |  |  |
| Format cells to display numbers as percentages |  |  |  |  |
| Apply text formatting to cell contents: font size, font type. |  |  |  |  |
| Apply text formatting to cell contents: bold, italic, underline, double underline. |  |  |  |  |
| Apply different colours to cell contents, cell background. |  |  |  |  |
| Apply an autoformat/table style to a cell range. |  |  |  |  |
| Copy the formatting from a cell, cell range to another cell, cell range. |  |  |  |  |
| Apply, remove text wrapping to contents within a cell, cell range. |  |  |  |  |
| Align cell contents: horizontally, vertically. Adjust orientation of cell contents. |  |  |  |  |
| Merge and centre cell contents in a merged cell. Unmerge cells. |  |  |  |  |
| Apply, remove border effects to a cell, cell range: lines, colours. |  |  |  |  |
| **Charts** |
| Understand the uses of different types of chart: column chart, bar chart, line chart, pie chart. |  |  |  |  |
| Create different types of charts from spreadsheet data: column chart, bar chart, line chart, pie chart.  |  |  |  |  |
| Select a chart. |  |  |  |  |
| Change the chart type. |  |  |  |  |
| Move, resize, delete a chart. |  |  |  |  |
| Add, remove, edit a chart title. |  |  |  |  |
| Add, remove a chart legend. |  |  |  |  |
| Add, remove data labels in a chart: values/numbers, percentages. |  |  |  |  |
| Change chart area background colour, legend fill colour. |  |  |  |  |
| Change the column, bar, line, pie slice colours in the chart. |  |  |  |  |
| Change font size and colour of chart title, chart axes, chart legend text. |  |  |  |  |
| **Prepare Outputs** |
| Change worksheet margins: top, bottom, left, right. |  |  |  |  |
| Change worksheet orientation: portrait, landscape. Change paper size. |  |  |  |  |
| Adjust page setup to fit worksheet contents on a specified number of pages. |  |  |  |  |
| Add, edit, delete text in headers, footers in a worksheet. |  |  |  |  |
| Insert, delete fields: page numbering, date, time, file name, worksheet name into headers, footers. |  |  |  |  |
| Check and correct spreadsheet calculations and text. |  |  |  |  |
| Turn on, off display of gridlines, display of row and column headings for printing purposes. |  |  |  |  |
| Apply automatic title row(s) printing on every page of a printed worksheet. |  |  |  |  |
| Preview a worksheet. |  |  |  |  |
| Print a selected cell range from a worksheet, an entire worksheet, number of copies of a worksheet, the entire spreadsheet, a selected chart.  |  |  |  |  |

**Assessment Completed by:**

**Date:**

**Action Plan**

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| --- | --- | --- |
| **Agreed Skills to Develop** | **Target Date** | **Comments/Progress** |
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**Review/Re-assessment Date:**