###### LEARNER

###### Portfolio of Evidence

###### MS Excel Intermediate

###### Unit Standard 116940

###### Level 3 Credits 6



**PERSONAL INFORMATION**

|  |  |
| --- | --- |
| *NAME* |  |
| *CONTACT ADDRESS* |  |
|  |
| *Code* |  |
| *Telephone (H)* |  |
| *Telephone (W)* |  |
| *Cellular* |  |
| *Learner Number* |  |
| *Identity Number* |  |
|  |
| *EMPLOYER* |  |
| *EMPLOYER CONTACT ADDRESS* |  |
|  |
| *Code* |  |
| *Supervisor Name* |  |
| *Supervisor Contact Address* |  |
|  |
| *Code* |  |
| *Telephone (H)* |  |
| *Telephone (W)* |  |
| *Cellular* |  |

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## Contact Details

|  |  |
| --- | --- |
| Unit Standard: |  |
| Course: |  |
| Assessor Details |
| Name |  |
| Branch |  | Registration No: |  |
| Contact Details | email: |  |
| Phone: |  | Fax: |  |
| Moderator Details |
| Name |  |
| Branch |  |
| Contact Details | email: |  | Registration No: |  |
| Phone: |  | Fax: |  |
| Candidate Details |
| Surname |  | Name |  |
| College |  | ID No |  |
| Branch |  |
| Contact Details | Email: |  |
| Phone: |  | Fax: |  |

## Record Of Learning

|  |  |  |
| --- | --- | --- |
| Candidate's Name:  | ID No |  |
| Assessor's Name: | Ass. Reg. No |  |
| Moderator's Name:  | Mod. Reg. No |  |
| Date: |  |
| UNIT STANDARD | NQF LEVEL  | CREDITS | DATE OF COMPLETION | SIGNATURE OF ASSESSOR | SIGNATURE OF MODERATOR |
| 116940 | 3 | 6 |  |  |  |

# UNIT STANDARD 116940

Unit Standard Title

Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem

Unit Standard ID

116940

NQF Level

3

Credits

6

Specific Outcomes

**Specific Outcome 1:** Prepare and produce a spreadsheet to provide a solution to a given problem

**Assessment Criteria**

* An outline solution is developed to meet the requirements of a given brief
* The spreadsheet produced addresses the given problem

**Specific Outcome 2:** Adjust settings to customise the view and preferences of the spreadsheet application

**Assessment Criteria**

* Toolbar menus are switched off and on
* The view of the spreadsheet is enlarged and made smaller
* The way that the spreadsheet is viewed is changed
* Cells are frozen to prevent scrolling: Row, column, both
* The default file location is changed
* A user name is added to the file

**Specific Outcome 3:** Work with multiple worksheets

**Assessment Criteria**

* The purpose of using multiple worksheets within one spreadsheet file are explained
* New worksheets are opened: Minimum 3 worksheets
* Worksheets are renamed
* Each worksheet to have a different name
* Cells are manipulated between worksheets
* A worksheet is deleted

**Specific Outcome 4:** Apply formulae to worksheets to provide alternative solutions to a problem: Formulae to include at least 3 of: addition (+), subtraction (-), multiplication (\*), division (/), percentage (%).

**Assessment Criteria**

* Formulae are entered taking into consideration the natural order of operation
* Formulae are entered to deliberately change the natural order of operation
* The difference between relative and absolute cell addressing is demonstrated
* Data are changed to test possible solutions to the given problem without having to change formulae
* Scenarios are created that demonstrate different possible outcomes

**Specific Outcome 5:** Apply simple built-in functions

**Assessment Criteria**

* Functions are explained in terms of their purpose, use and construct
* At least one function to be used as an example
* Simple Mathematical functions are applied
* At least the following functions: sum a range, round to a specified number of decimals
* Statistical functions are applied that achieve the anticipated result: At least two of the following functions: average a range, count the number of cells that contain numbers, find the highest value in a range, find the lowest value in a range

**Specific Outcome 6:** Apply formatting to a spreadsheet

**Assessment Criteria**

* Methods of automatically formatting a spreadsheet are explained: Templates, styles, manual
* A spreadsheet is created using a template
* Cells are formatted using styles
* Formats are copied

**Specific Outcome 7:** Use special effects to improve the presentation of the spreadsheet

**Assessment Criteria**

* Text is centered across a cell range
* Orientation of text within a cell is changed
* A border is applied to cells and removed from cells: Cell, range of cells, entire column, entire row
* Fill (shading) is applied to cells and removed from cells: Cell, range of cells, entire column, entire row

**Specific Outcome 8:** Print a spreadsheet

**Assessment Criteria**

* The page setup of a spreadsheet is changed: Page scaling to fit the page, margins
* Header and footer information is added to a spreadsheet and modified: At least two of the following: title, date, time, page numbers, spreadsheet information
* Spreadsheet is previewed to check that the presentation is in accordance with the given specification
* The spreadsheet is printed

**Specific Outcome 9:** Evaluate a spreadsheet

**Assessment Criteria**

* The spreadsheet is evaluated for compliance with a given problem, appropriate formatting, readability, legibility, presentation, accuracy, and data integrity
* The spreadsheet is modified if required and compliance with the brief is confirmed

Critical Cross-field Outcomes (CCFO)

* Identify and solve problems in which responses display that decisions using critical and creative thinking have been made
* Organise and manage oneself and one’s activities responsibly and effectively
* Collect, analyse, organise, and critically evaluate information
* Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written persuasion when engaging with the subject
* Use science and technology effectively and critically, showing responsibility towards the environment and health of others

**Formative Assessments**

**Formative Assessment 1**

Open the workbook ***Alignment*** then click in cell ***C2*** then freeze the panes of the worksheet

Scroll around the sheet, noticing that the titles always remain on the screen

Hide column A

Unfreeze the panes

Unhide the column

Go to cell A1 then go to cell E33

Hide rows ***17:18***

Open a new window and arrange to view the windows vertically

 Close the second window

Open ***List of hard copy resources***

Select ***View Side by Side***...

Practise scrolling around one window and observe the changes in the other window

End side by side viewing

Use the horizontal split box to split the screen into two so that you can view the fixed and variable expenses on the screen together

Remove the split

Use Freeze Panes to lock the Source headings for scrolling across the sheet

Remove the split

Use Zoom to view all data on the worksheet without scrolling

Save and close ***List of hard copy resources***

Save and close the ***Alignment*** workbook

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative Assessment 2**

Open the workbook ***List of hard copy resources***

Delete column ***B***

Rename ***Sheet 1*** as ***Topics***

Make the sheet ***Topics*** colour ***Pale Blue***

Select rows 1 to 8 then click ***Copy*** 

Click the ***Sheet3*** tab

Click ***Paste*** 

From the ***Paste Options*** smart tag, select ***Keep Source Column Widths***

Rename ***Sheet 2*** to ***Subjects*** and apply the ***Pale Yellow*** colour

Delete ***Sheet 3***

Right-click the ***Topics*** sheet and select ***Move or Copy...***

Move to the end of the workbook and make it a copy

Click the original ***tab*** sheet and delete rows 2 to 8

Save and close the workbook

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative assessment 3**

Open the Budget workbook

Enter the details of your personal budget

Add the total of your monthly expenses

Add the total of your monthly income

Subtract the total expenses from the total income

Calculate the percentage of your monthly income that you save

**Formative Assessment 4**

Open a new workbook

Enter the following details:

|  |  |
| --- | --- |
| Afrikaans  | 70 |
| English |  85 |
| Mathematics  | 65 |
| Social sciences  | 55 |
| Life skills | 63 |
| Information technology | 72 |

Create a formula to calculate the average grades

Create a formula to calculate the minimum grades

Create a formula to calculate the maximum grades

Practice ROUNDUP, ROUNDOWN, COUNTIF formulas

Save the workbook as ***Functions*** and your name

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative Assessment 5**

Open the workbook ***List of hardcopy resources***

Format cell ***A1*** as follows

Font - ***Times New Roman***

Font Size – ***12***

Font Style – ***Bold***

Font Colour - ***Red***

Save this formatting as a style called ***Title***

Apply the ***Title*** style to cell ***B1 to F1***

Format cells B2 as follows

Font - ***Century*** ***Gothic***

Font Size – ***9***

Font Style – ***Italics***

Font Colour - ***Blue***

*Tip* ***If the*** Century Gothic ***font is not installed on your PC, use another font of your choice.***

Save this formatting as a style called ***Subtitle***

Apply the ***Subtitle*** style to cells ***AB3: B51***

Modify the ***Title*** style so that the style is underlined

Delete the ***Subtitle*** style

Save and close the workbook

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative Assessment 6**

Open the ***budget workbook***

Format the workbook in a style of your choice

Save the workbook as a template with the name: ***My budget template***

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative Assessment 7**

Open the ***Functions*** workbook

Change the alignment of the text of the names of subjects

Add borders and shading to the cells containing the names of subjects

Save and close the workbook

|  |  |
| --- | --- |
| Competent  | Not competent |

Formative Assessment 8

Print your ***Budget*** workbook

|  |  |
| --- | --- |
| Competent  | Not competent |

**Formative Assessment 9**

Evaluate all your worksheets:

Is the worksheet readable and pleasing to the eye?

Are the details accurate?

Do spell checks

Do error checks

|  |  |
| --- | --- |
| Competent  | Not competent |

### Summative Assessment

## Questionnaire and Observation

Note to facilitator: certain of these activities must be observed by you. See questions 9, 11, 14, 15, 16, 17, 18

1. In a new worksheet, enter the information as shown below. (10)

Award 10 points if information entered correctly

*ABC computer store has the following income and expenditure amounts for the period January to March:*



1. Once you have entered the information, in A11, add a cell that reads: Average Expenses, then change the column width of this cell so that all the text shows in the cell. (1)
2. Change the formatting of cells B2:D5 and B8:D10 to number format (2)
3. Change the font type of cells B2:D2 to Book Antiqua 12 (1)
4. Change the horizontal alignment of cells B2:D2 centre aligned (1)
5. Change the format of cell A12 to Date and time and enter today’s date (2)
6. In cell A13, enter the current time (1)
7. Save your workbook named Income and Expenses followed by your name to the Desktop (3)
8. Open the Assessment Datafile workbook. Copy rows A3:E11 to your Income and expenses workbook in a new sheet. (2)
9. Rename the sheet to Debtors (1)
10. Keep both workbooks open (1)
11. In your Income and expenses workbook, add a button to your Quickstart toolbar. (3)
12. Adjust the column width of columns B,C and D to match that of column A. (3)
13. Change the view of the workbook to Page Break Preview (2)
14. Highlight column A and apply freeze panes (2)
15. Change the view of the Assessment Datafile workbook to 75%. (2)
16. In your Income and Expenses worksheet, insert three more worksheets to the workbook (3)
17. Delete the sheet named Debtors (3)
18. Open a new workbook
19. In cells C3 to C7, enter the following numbers and then convert to the accounting format, with two decimals: C3: 3130; C4: 4485; C5: 7250; C6:853; C7: 776. (1)
20. In row 1 type the following and then centre the text across cells columns A to H: Internal Sales, February 12. (1)
21. Go back to C5 and change the numbers to read 7350. (1)
22. In cell A3 type Exotic Nuts; cell A4: Caramel Nuts; cell A5 Flavoured peanuts; cell A6 Raw peanuts; cell A7 Dried Fruit and then centre the text in each cell. (7)
23. In cell B3, type Dept 1 B4 Dept2, B5 Dept3, B6 Dept4 B7 Dept5 and then use Autofill to drag down to B7, ending with Dept 5. (6)
24. Add the totals in column C, so that the answer shows in C8. (2)
25. In cell D3 enter 18, in cell D4 enter 353. Now multiply these two amounts, requesting the answer in cell D5 (2)
26. In cell D6 enter 3573 and in cell D7 enter 185. Now divide 185 into 3573, requesting the answer in cell D8. (2)
27. In column E enter the following amounts: E3: 373; E4: 568; E5: 676; E6 881. Add the column using the SUM function (2)
28. In column F enter the following amounts: F3: 17; F4: 45; F5: 235; F6: 485. Add the column using the AutoSum button on the ribbon. (2)
29. Go to sheet 2 of your workbook and in cell A2 enter Monday, then using Autofill drag down to cell A6, ending with Friday (2)
30. Enter the following amounts: C2: 5440; C3: 6330; C4 4845; C5: 4231; C6: 7835; C7: 8915. Now clear the contents of cell C7 and then add the column (3)
31. In cell B2 enter 4315; cell B3: 7433; cell B4: 6793, then add the column using any of the features that Excel provides. (2)
32. In cell D2 enter 33154,78 and in cell D3 enter 24938,95 and then subtract to ascertain the difference. (2)
33. Enter the following amounts: cell E2: 28394; cell E3: 7630; cell E4: 5321 and now centre the text across the cells. Add the column, using any feature of your choice. (2)
34. Save the worksheet in My Documents as your name Function Assignment. (1)
35. You want to buy a car for R80000 which has to be repaid over five years (60 months) at an interest rate of 12%. On sheet 2 calculate the interest payment for month 24 on this loan. Then calculate your monthly payments. (10)
36. Copy and paste your calculations to one of the worksheets in your Income and Expenses workbook (2)
37. Rename the worksheet Interest repayments (1)
38. Go to your Income and Expenses workbook and do the following calculations: In E3 calculate Average income for PC Sales (2)
39. In E4 calculate Maximum income for PC Repairs (2)
40. In E5 calculate Minimum income for PC Support (2)
41. In your Income and Expenses workbook, merge and centre row1 (1)
42. Change the font to Tahoma (1)
43. Put borders around cells A1 to D2 (2)
44. Select all the cells from B3: D5 and centre all the information in these cells. (2)
45. Select cells A2:A5 and A8: A10 and add light grey shading (fill) to them. (3)
46. Explain the purpose of using multiple worksheets (2)

**Total: 110**

## Workplace Project

1. Select a brief at work that requires you to develop a spreadsheet.
2. Develop the spreadsheet, following the procedures laid down in your organisation.
3. The spreadsheet must consist of at least 3 sheets, 4 functions and 2 formulas
4. Add borders and shading to make information stand out
5. Change the font size and colour of different parts of the spreadsheet
6. Change column widths and row heights to suit the information
7. Change the alignment of information in cells
8. Add the date and time of completion of the spreadsheet
9. e-mail the spreadsheet to your facilitator, or save to a flash drive (or CD-ROM) and deliver to your facilitator

check that learner’s work includes all the above activities and that the information in the spreadsheet is laid out in a logical way

## Declaration Of Authenticity Of Evidence

|  |
| --- |
| I (Initials and Surname)  |
| ID No:  |
| declare/certify that the learning activities completed in the learner activity workbook in its entirety is my own original and authentic work (interpreter declaration to be completed where necessary) I acknowledge that should it come to the attention/reported to the training provider/ SETA or relevant authorities, and there is sufficient evidence to prove that there is an irregularity regarding the authenticity of this submission the necessary steps will be taken against me which can result in the one or more of following decisions being taken:  |
| * A criminal case being opened,
* Learner achievement certificate cancelled, withdrawn
* Non processing of learner achievement submissions to the SETA pending the outcome of an investigation
* De-registration as an assessor/moderator (where unauthorised assistance is provided by the assessor/facilitator)
* Investigation into the accreditation status of the training provider if there is an irregularity on the part of the training provider
 |
| I know and understand the contents of this declaration: I have no objection to signing the prescribed declaration, The declaration was also explained to me by the training provider/facilitator |
| Signature of Learner: | Date |
| Signature of facilitator/assessor:  | Date |

**Candidate comments on what they have learned and if the unit standard will assist them in their work or future prospects?**

|  |
| --- |
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##

## Assessor's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name |  | ID No. |  |
| Assessor's Name |  | Reg. No. |  |
| Unit Standard Title | 116940 |
| **ASSESSMENT DECISION** |
| Specific Outcome | C | NYC | Comments |
| Prepare and produce a spreadsheet to provide a solution to a given problem |  |  |  |
| Adjust settings to customise the view and preferences of the spreadsheet application |  |  |  |
| Work with multiple worksheets |  |  |  |
| Apply formulae to worksheets to provide alternative solutions to a problem |  |  |  |
| Apply simple built-in functions |  |  |  |
| Apply formatting to a spreadsheet |  |  |  |
| Use special effects to improve the presentation of the spreadsheet |  |  |  |
| Print a spreadsheet |  |  |  |
| Evaluate a spreadsheet |  |  |  |
| Overall Assessment Decision |  |
| Comments |  |
| Date  |  |
|  |  |
| Signature of Assessor | Signature of Candidate |

## Moderator's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Moderator's Name |  | Reg. No. |  |
| Assessor's Name |  | Reg. No. |  |
| Candidate's Name |  | ID No. |  |
| Unit Standard Title | 116940 |
| **MODERATION DECISION** |
| Specific Outcome | C | NYC | Comments |
| Prepare and produce a spreadsheet to provide a solution to a given problem |  |  |  |
| Adjust settings to customise the view and preferences of the spreadsheet application |  |  |  |
| Work with multiple worksheets |  |  |  |
| Apply formulae to worksheets to provide alternative solutions to a problem |  |  |  |
| Apply simple built-in functions |  |  |  |
| Apply formatting to a spreadsheet |  |  |  |
| Use special effects to improve the presentation of the spreadsheet |  |  |  |
| Print a spreadsheet |  |  |  |
| Evaluate a spreadsheet |  |  |  |
| Overall Moderation Decision |  |
| Feedback to Assessor |  |
| Action Required  |  |
| Date of Moderation |  |
| Signature of Moderator |  |
| Signature of Assessor |  |
| Signature of Candidate |  |