**Budgeted vs Actual Planning Template**

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| **Instructions**  To complete this template, you will need to:   * refer to the following: * Specific information in relation to the Budgeted spreadsheet * CBSA Style Guide * The Data Management Policy * Budgeted Planning Project Financial Data * Email from Gavin Stead * Voice Message from May Lee * have a good understanding of: * advanced functions of spreadsheet software applications, for example, MS Excel’s mathematical functions and formulas etc * charts and graph styles in Excel * spreadsheet design concerning presentation and readability of data/information, for example, MS Excel’s conditional formatting etc. | |
| CBSA BUDGETED v ACTUAL SPREADSHEET | |
| 1. **Planning Topics and Key Questions** | 1. **Planning and responses**   *Use the space provided below to write your plan by responding to each of the questions.* |
| 1. Task purpose:  * Why is the spreadsheet needed?   (Response length approximately 55 words) |  |
| 1. Audience:  * Who will be using the spreadsheet?   (Response length approximately 35 words) |  |
| 1. Data entry:  * What data needs to be entered into the spreadsheet?   (Response length approximately 55 words) |  |
| 1. Storage:  * How will the spreadsheet documents be saved? * What is the organisational policy and procedure in relation to storage?   (Response length approximately 220 words) |  |
| 1. Output required:  * Make a simple sketch to indicate the type of output required.   (Response length approximately 90 words) |  |
| 1. Reporting and organisational requirements:  * How can I make sure that the spreadsheet can be modified easily? * What must key points from CBSA’s Style Guide be followed?   (Response length approximately 130 words) |  |
| 1. Presentation:  * How can the data be presented in a meaningful way? * How I can make the data clear and legible? Easy to read etc.? * How will I arrange the data logically?   (Response length approximately 320 words) |  |
| 1. Linked spreadsheet needs:  * Are multiple worksheets needed? * Is there a need to link the spreadsheets?   (Response length approximately 35 words) |  |
| 1. Cell formats and data attributes assigned to cells:  * Is there a need to change the standard cell format and attributes?   (Response length approximately 60 words) |  |
| 1. Advanced software functions and formula:  * Use a pen and paper to make a sketch to determine what data is consistent and static compared to the data that will be changing. * What types of formulas are needed, and what formatting features will I use?   (Response length approximately 105 words) |  |