**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.
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| 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)  |  |