City & Guilds Level 3- Spreadsheet software (SS 7574-327)

Assignment guide for Candidates

Assignment A

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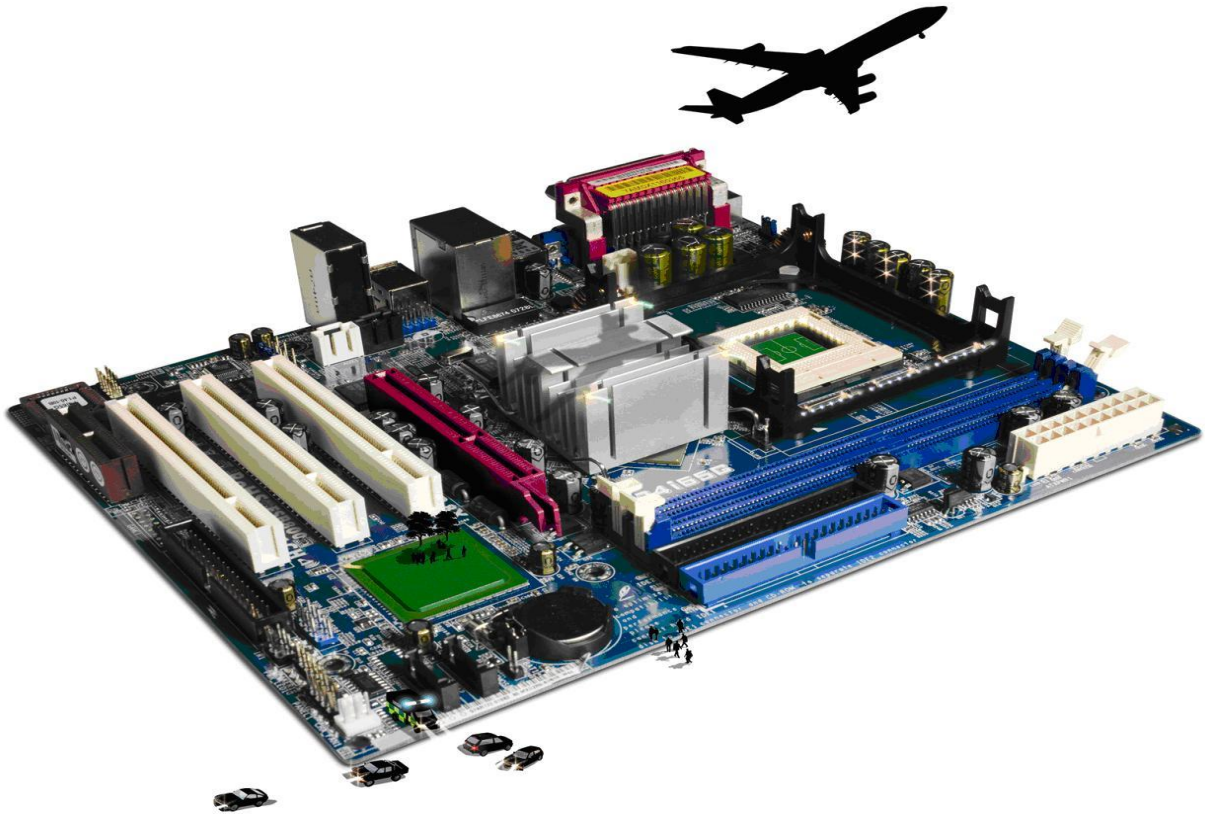

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Level 3 Spreadsheet software (SS 7574-327)
Assignment A
Introduction – Information for Candidates

About this document
This assignment comprises all of the assessment for Level 3 Spreadsheet software (SS 7574-327).

Health and safety
You are responsible for maintaining the safety of others as well as your own. You are asked to work safely at all times.

You will **not** be allowed to continue with an assignment if you compromise any of the Health and Safety requirements.

Time allowance
The recommended time allowance for this assignment is **two and a half hours**.

Level 3 Spreadsheet software (SS 7574-327)
Candidate instructions

Time allowance: Two and a half hours

The assignment:

This assignment is made up of **four** tasks

- Task A - File set up
- Task B - Creating spreadsheets
- Task C - Creating a graph
- Task D - Creating a loan calculator

Scenario

You have just been employed as an administrator for a local car sales company (Heston Automobiles). The manager, Mr Heston, employs six salespersons and has been trying to keep quarterly records of their sales performance for the past four years.

He has just changed computer systems and has lost a lot of his work but did salvage some of his data as backup files in the format of a tab delimited text file. The data covers the past three years and the first two quarters for this year. You are now in the third quarter of Year four.

Each of the six salespersons has a target value of sales for the year which is based on a percentage of the company's target for the year.

Mr Heston has specified that he wants to use the existing and future sales information to inform the overall turnover of his business and to award, where appropriate, bonuses. In addition he would like to see a graphical depiction of every salesperson's productivity which will be used for appraisal purposes.

Your task is to transfer the existing data to a spreadsheet application and manipulate it in order for Mr Heston to be able to make his strategic decisions.

Read all of the instructions carefully and complete the tasks in the order given.

Task A – File set up

1 In your work area or on your removable media create a new directory/folder and name it **Heston**.

2 Copy the tab delimited text file, provided by your assessor, called **heston.txt** to the **Heston** folder.

Continued over…

3 Open your spreadsheet application and import the **heston.txt** file.

Name the first worksheet as **Salesperson_Sales**

Add your name and today's date as a footer.

4 Save the spreadsheet as **MyBackup** in your **Heston** folder.

Task B – Creating spreadsheets

1 Resave the spreadsheet with the name **Heston_Master** and save it in your **Heston** folder.

Note: You are advised to save your work at regular intervals throughout this assignment.

2 Add a new row to the top of the worksheet and insert the title **HESTON AUTOMOBILES**.

Format the title to a larger coloured font.

Format **all** worksheets so that column headings are emboldened and that **all** data can be clearly viewed.

3 All monetary values are to be displayed as local currency, formatted to zero decimal places and right aligned.

4 Sort the data in **Salesperson_Sales** in ascending order of salesperson's name then years.

5 On the worksheet **Salesperson_Sales** create a new column in a suitable location with the heading **Percentage**.

6 For each row under the heading **Percentage** create a formula that will display each salesperson's annual sales against the target that was set. Ensure that the results are displayed as a percentage.

7 For each percentage value, create a conditional formatting for each of those cells that changes the cell colour to red if the salesperson's annual sales have not been reached and green if they have been reached or exceeded.

8 Review the worksheet **Salesperson_Sales** to ensure that it is fit for purpose and make any adjustments necessary.

9 In order to fulfil the specifications, create a linked copy of the worksheet **Salesperson_Sales** to **two** new worksheets.

Name the worksheets as **Company_Turnover** and **Staff_Bonuses**. Ensure formatting on these two sheets is consistent with the first sheet. Remove any excess data that may be created by the linking process.

Continued over…

10 In worksheet **Company_Turnover**, sort your data ascending by year, then ascending by salesperson.

Create a large enough break between the rows so that the year groups are clearly separated.

11 In the first row under each year group create a function that adds up the total value for each of the columns with monetary values.

Replicate this for the other year groups.

Add any suitable row text to explain the values created.

12 Create a new column to the right of the data with the heading **Profit/Loss**.
Format the headings to have the same appearance as **all** other headings.

13 Under **Profit/Loss** and in line with the monetary totals, create a formula that calculates a percentage value based on annual sales against the target sales.

Create the same conditional formatting for these cells as used in **Salesperson_Sales**.

14 Enhance the worksheet using any suitable method to further identify the yearly groups of sales figures and check your work to ensure it meets the specification.

15 Apply the same, or a similar formatting, to the worksheet **Staff_Bonuses** in order to separate the year groups.

16 In **Staff_Bonuses**, copy or recreate the formula used for the **Profit/Loss** column in **Company_Turnover** to the bottom line of the **Percentage** column for each year group and replicate the conditional formatting for the cell colours. If they are not already present replicate the monetary totals for each column as previously created in the Company Turnover sheet.

17 Insert **two** additional columns to the right of the existing data with the heading names **Eligible** and **Bonus @ 75%**.

18 In the column **Eligible**, against each salesperson create a logical function that returns **1** if the salesperson has reached or exceeded their target sales and **0 (zero)** if not.

In line with existing totals for each year group, insert a function that totals the returned values.

19 The company has a policy of distributing 75% of its profits back to the sales team as bonuses each year only if the profit exceeds 105% of its target sales (profit=annual sales – target sales).

Only the sales persons who have reached or exceeded their targets for the year are eligible to receive any bonus.

Under the column heading Bonus @ 75%, and in line with the existing totals for each year group, create a formula that calculates how much profit is to be *distributed* to the sales team for that year.

Continued over…

20 Under the column heading Bonus @ 75% and for each salesperson create a formula that will determine their eligibility for a bonus that returns 0 (zero) if not eligible and their percentage of the profits if they are eligible.

Replicate these formulas for all year groups.

21 Ensure that the monetary values for Bonus @ 75% are set to local currency and to two decimal places.

22 Use suitable methods to check that the correct values have been calculated.

Adjust any formatting to ensure that your work meets the company's needs and save the spreadsheet.

Task C – Creating a graph

1 Create a new worksheet at the end of your workbook with the name **Graph**.

2 Using the data contained in **Salesperson Sales** create a bar graph which displays the total sales for each salesperson over Years **1** to **3** only.

(If necessary copying any data required to this worksheet or by any other suitable method such as pivot charts.).

3 Add a series legend and any other enhancement(s) available to you to improve the design.

Ensure that the graph displays the salesperson name.

4 Add the title **HESTON AUTOMOBILES** to the graph.

5 Ensure that any values show as the local currency.

6 Make any adjustments to the graph to aid readability, check the graph for accuracy and save your work.

Task D – Creating a loan calculator

1 Create a new worksheet at the end of your workbook/spreadsheet with the name **Loan**.

2 Using a suitable formula, create a formula/function that will calculate monthly repayments.

Continued over…

3 Use the following initial values for your setup:

- Loan – 100,000
- Interest rate – 6%
- Loan period – 5 years.

4 Set all monetary values to local currency and **two** decimal places, set percentages to display **two** decimal places and use informative text to help guide the user for your row headings.

5 Check the worksheet for accuracy, and make any necessary amendments.

Save your work and close the application.

When you have finished working:

- Sign each document above your name and label all removable storage media with your name.
- Hand all paperwork and removable storage media to your assessor.

If the assignment is taken over more than one period, all paperwork and removable media must be returned to the test supervisor at the end of each sitting.

End of assignment

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