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

ITQ

Assignment guide for Candidates

Assignment B

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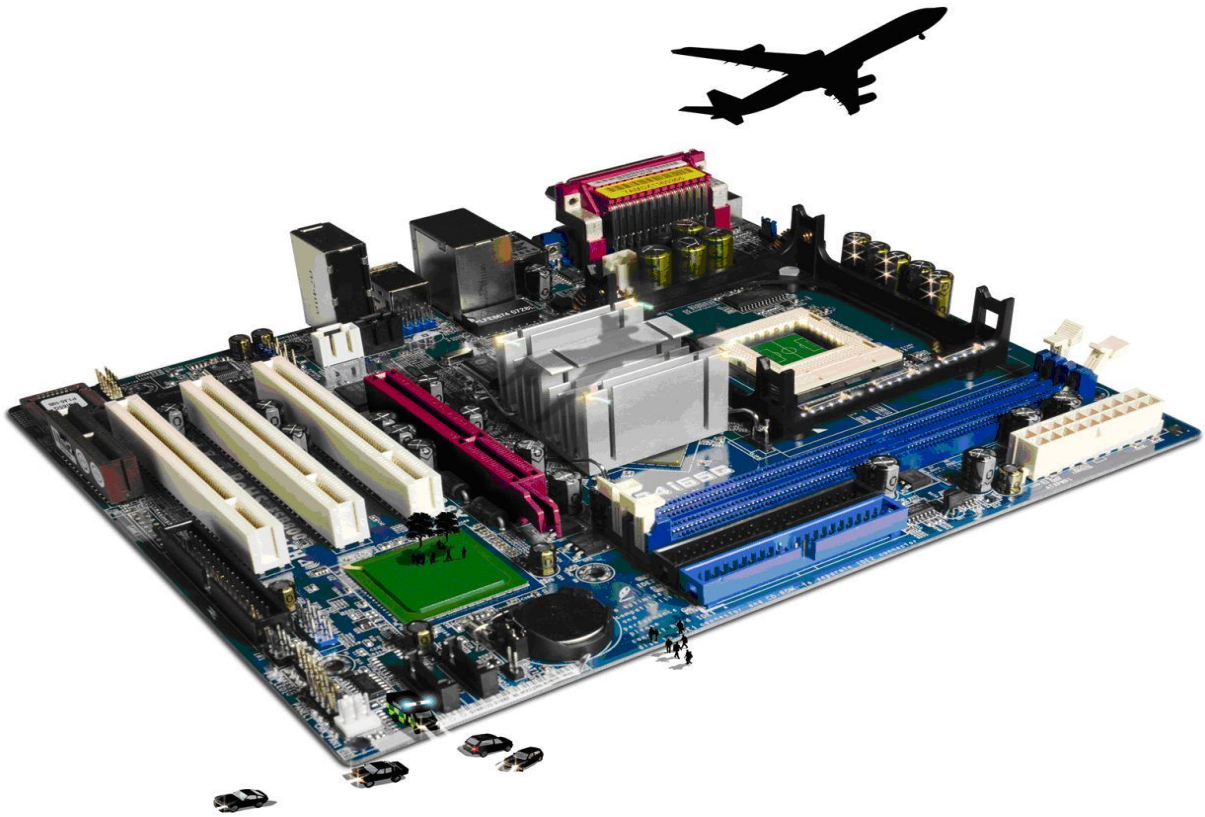

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Assignment B

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 hour

The assignment:

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

- Task A - File set up
- Task B - Preparing worksheets
- Task C - Performing calculations
- Task D - Analysing the data
- Task E - Creating totals and formatting spreadsheet
- Task F - Linking data, creating graphs/charts and forecasting results
- Task G - Answering questions

Scenario

You have just been employed as an administrator for a local kitchen company (Weston). Your manager (Mr Weston) has been keeping quarterly records of their sales performance for the past 3 quarters only.

Mr Weston would like to use the existing data held in a text file to forecast his sales for this year and to create a spreadsheet that could be used to inform him of the company's performance for future years. This will in turn assist him to make any strategic decisions.

He has tasked you to create a spreadsheet to the specification he has set down below and to create a graph/chart to graphical depiction this year's sales to date. Unless otherwise stated the final appearance of the spreadsheets can be of your own design.

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

Task A – File set up

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

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

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

Name the first worksheet as **Imported**.

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

4 Save the spreadsheet as **Weston1** in your **Weston** folder.

Task B – Preparing worksheets

1 Copy the contents of worksheet **Imported** to a new worksheet in the same workbook and name it as **Projection**.

2 Insert a new column after **Q3** and insert the column heading **Q4**.

3 Based on the sales for Q1, Q2 and Q3 use a formula to calculate for each row the number of items that will need to be sold in Q4 in order to reach the target, responding to any problems that may occur.

4 Adjust the column width if necessary to ensure that all data can be seen and change the font colour for that data only to be red.
Use suitable methods to check that the correct values have been calculated.

5 Apply conditional formatting to the data in column Q4 that differentiates between any positive or negative data values, as negative values would have already reached their target sales. The text, background colour or both for negative values must be a different colour to the other data.

6 Save your spreadsheet as **WESTON2**.

Task C – Performing calculations

1 On the **Projection** worksheet, insert columns next to Q1, Q2 and Q3 **only** with the headings **Qx Sales** (where **x** is the quarter number) to signify the sales values for those quarters adjusting any column widths as necessary. Underneath each of the new (**Qx Sales**) headings, use a formula to calculate the value of the sales for each product based on the quarterly sales and the cost price. Ensure your formulas for each quarter are suitable for replication and replicate for each product.

2 Check your work and correct any errors that may have occurred during this process to ensure that all existing data is still displayed.

Format all monetary values to be local currency and to 2 decimal places.

Improve the appearance and readability of you spreadsheet by adjust any width of all columns

or layout as necessary.

3 Embolden all column headings with a suitable background fill.

4 Use a suitable background colour to group all the data for each of the quarters but **not** Q4.

5 Save your spreadsheet as **WESTON3**.

Task D – Analysing the data

1 On the **Projection** worksheet, insert a new column heading to the right of the spreadsheet labelled:
Target Sales.

2 To the right of **Target Sales** insert two additional columns with the headings **To Date** and **Comment** (in that order).

3 In the last row, under the column heading **Cost Price** insert the right aligned and embolden row label **Total**:

4 In the row directly under the column heading **Target Sales** use a suitable formula/function to calculate the value of the target sales based on target number and cost. Replicate that formula/function to all the product cells in that column.
Check that all resulting values are visible.

5 In the row directly under the column heading **To Date** use a suitable formula/function to calculate the total value of sales for Q1, Q2, Q3 based on the item cost.
Check that all resulting values are visible.

6 On the same row as **Total**: use a formula/function to calculate the total values for all columns containing monetary values.

7 Format all currency cells to be local currency and to 2 decimal places.
Check that all resulting values are visible.

8 Save your work as **WESTON4**.

Task E – Creating totals and formatting spreadsheet

1 Delete worksheet **Imported**.

2 Under the row label **Total**: create a new row label named **Percentage of target:** and apply the same formatting as **Total**.

3 In the same row and under the column hading **To Date** use a suitable formula/function to show the percentage of all the sales to date against the target sales. Format the result to 2 decimal places.

4 Insert a new row at the top of the worksheet and add the title **WESTON KITCHENS** in a suitable location and using a larger and coloured font.

5 Save your work as **WESTON5**.

Task F – Linking data, creating graph/charts and forecasting results

1 Copy all the values in the row **Total** to a new worksheet as linked data and name the worksheet as **Linked**.

Enhance the worksheet by copying their related column headings and the title **WESTON KITCHENS**.

2 Insert a new column after Q3 Sales with the heading **Shortfall**. Apply the same formatting as other column headings.

3 Create a formula/function that returns the value the **Target Sales** less the **To Date** value.

Check that monetary values are in local currency and to 2 decimal places.

4 On the same worksheet insert a suitable graph with a legend that displays all sales values to date and the shortfall amount. Format the graph to displays the actual values for each quarter and the shortfall.

5 Under the graph, using the average value of Q1, Q2 and Q3 for Q4, forecast the effect on annual sales, based on the total of all sales for the year against the target sales and responding to any problems that may occur.

Insert the label - **Forecast of annual sales based on the average of and previous sales:** and insert the result into the next cell to the right.

Format the result as a percentage to 2 decimal places.

6 On the **Projection** worksheet under the column headed **Comment,** for each row create conditional formatting that displays the text **On Target** if the target sales have been reached or exceeded and no text if they have not.
Format the text to be right aligned, green and bold.

7 Check you work, delete any unused/spare worksheets and save your spreadsheet as **WESTON6**.

Task G – Answering questions

1 Use the Answer Sheet provided to answer questions, inserting your name and today's date as a footer.

2 Explain three methods that can be used to summarise, analyse or interpret spreadsheet data and when to use them.

Briefly, explain how to present and format spreadsheet information effectively to meet needs.

Briefly, explain how you would sort out any errors in formulas.

3 Save your answer sheet as **AnswerXX** (where XX is your initials) into your **Weston** folder.

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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