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

## ITQ
## Assignment guide for Candidates
Assignment C

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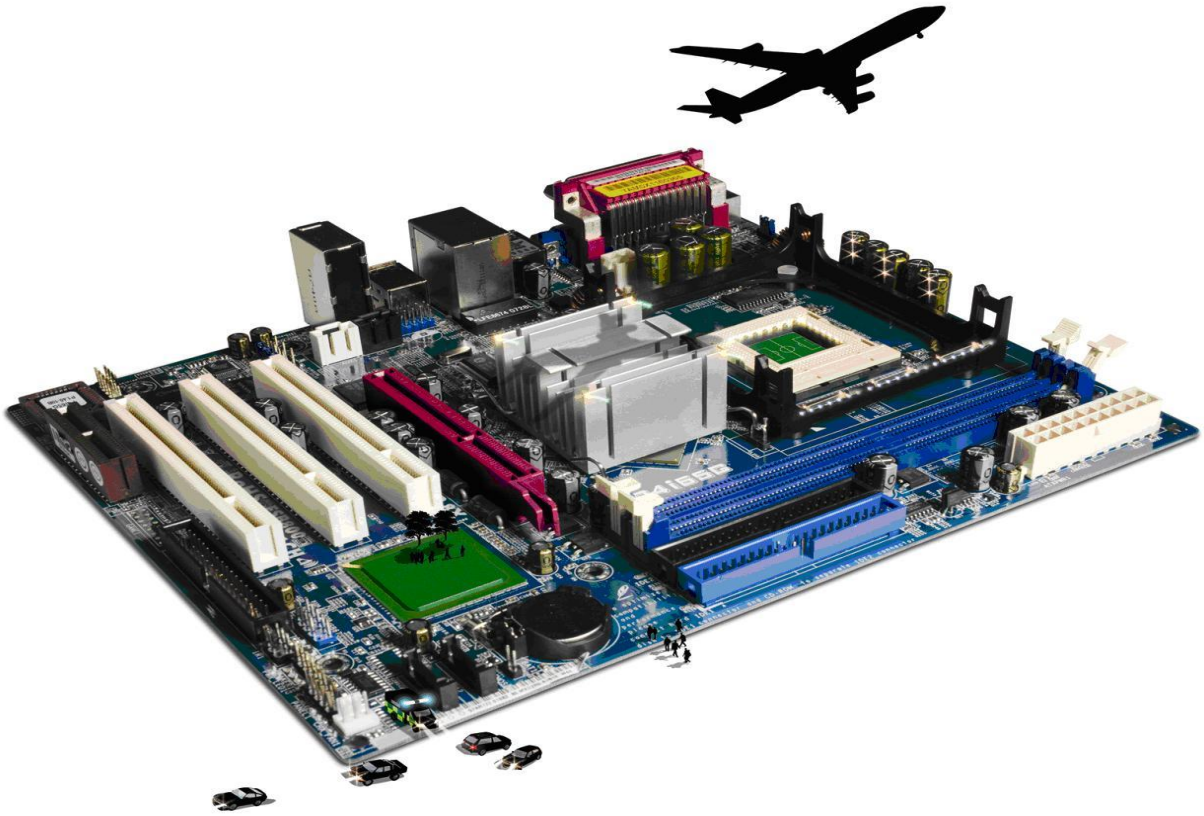

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# Level 3 Spreadsheet software (7574-327)
# Assignment C
Introduction – Information for Candidates

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

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## 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 (7574-327)
# Assignment C
Candidate instructions

## Time allowance: two and a half hours

## The assignment:

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

- Task A - File set up
- Task B - Create spreadsheets and forecast sales
- Task C - Create graphs
- Task D - Analyse performance of employees
- Task E - Analyse product sales
- Task F - Answer questions

## Scenario

You have been hired as a Manager at a marketing company, **AndeCorp**. The company deals with market research and also acts as sales consultants. Clients entrust the company with business forecasts, appraisals, surveys etc. You will be expected to work across all functions. Your responsibilities include analysing reports, creating forecasts and summarizing reports.

The client is a well-established hardware supplier. The client would like you to use its existing data held in a text file, to forecast its sales for the current year. The client has also tasked you to create a graph to depict the year's sales to date.

Finally, the client wants you to analyse the performance of its regional managers

Save your files frequently (at least after each task) using suitable version control to enable you to revert to a previous version of a document should you need to.

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

## Task A – File set up

1 Create a folder in your work area or on removable/portable media called **AndeCorp**. Copy the Answer document provided to your folder.

2 Copy the tab delimited text files, provided by your assessor to the **AndeCorp** folder.

3 Open your spreadsheet application and import the **Sales.txt** file, and delete any blank columns.
Rename the first worksheet as **Sales_yearly**

4 Save the spreadsheet as **SalesFor** in the **AndeCorp** folder.

## Task B – Create spreadsheets and perform calculations

1 Copy the contents of worksheet **Sales_yearly** to a new worksheet in the same workbook and name it as **Forecast1**.

2 Copy the contents of worksheet **Sales_yearly** to another new worksheet in the same workbook and name it as **Forecast2**.

3 Navigate to **Forecast1** worksheet. Create a new column with **2017-Q4** as the heading after the column **2017-Q3**.

4 Apply relevant formula to calculate the percentage change from **2016-Q3** to **2016-Q4** in any empty cell in the same worksheet.

Apply this percentage change to the sales in **2017-Q3. Decrease decimal places to 1 point.** Put the result obtained to forecast the sales in **2017-Q4**

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

6 Insert a comment at the heading of the column and explain the formulae.

7 Navigate to Forecast2 worksheet. Create a new column with **2017-Q4** as the heading after the column **2017-Q3**.

8 Apply relevant formula to calculate the percentage change from 2017-Q1 to 2017-Q2 and 2017-Q2 to 2017-Q3 in any empty cell.

Calculate the average of the percentage change obtained from 2017**-Q1** to **2017-Q2** and from **2017-Q2** to **2017-Q3**.

Apply this percentage change to the sales in **2017-Q3. Decrease decimal places to 1 point.** Put the result obtained to forecast the sales in **2017-Q4**

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

10 Insert a comment at the heading of the column and explain the formulae.

## Task C – Create graphs

1 Create a new worksheet in the workbook. Name it **Graph1**.

2 Copy the table from **Forecast1** and paste it in **Graph1** worksheet.

3 Using the data from the table, create a suitable **scatter graph** which displays the quarter-sales for the time range in the data. Make sure the quarter names are specified clearly.

**Note:** Add any enhancements needed to improve the design and increase readability.

4 Add the title **Forecast 1_Graph** to the graph.

5 Create a new worksheet in the workbook **SalesFor**. Name it **Graph2**.

6 Copy the table from **Forecast2** and paste it in **Graph2** worksheet.

7 Using the data from the table, create a suitable **pyramid graph**, which displays the quarter-sales for the time range in the data. Make sure the quarter names are specified clearly.

**Note**: Add any enhancements needed to improve the design and increase readability.

8 Add the title **Forecast 2_Graph** to the graph.

## Task D – Analyse employee performance

1 Create a new worksheet in the workbook **SalesFor**. Name it **RegManager**.

2 Import the **RegM.txt** file and delete any blank columns.

3 Create a new column after Target and give the heading as **Target Percentage**.

4 Use a formula to calculate the percentage of the employees **Sales** against the target set. Ensure that the resulting value is displayed as a percentage.

5 Create conditional formatting and change the background colors of the cells as follows:
- If the sales have exceeded targets, change the color to green.
- If the sales are equal to targets, change the color to orange.
- If the sales are below targets, change the color to red.

6 Create a new worksheet and name it **Bonus**. Link the data in **RegManager** to **Bonus**.
**Note:** Skip blanks while linking.

7 Insert a column after **Target Percentage** and give the heading as **Reward**.

8 In the column **Reward**, create a logical function that would return 0 or 1 based on the value in **Target Percentage** column.
If the value is greater than 0%, the value in **Reward** should be **1**.
If the value is lesser than 0%, the value in **Reward** should be **0**.

9 Create a new column after **Reward** and title it **Bonus**. Calculate the **Bonus** of employees only when the corresponding Reward field is **1**.

10 When the **Reward** field is **1**, use the following conditions to calculate the **Bonus** of each employee.

- If the sales are below 25% of the target, reward them with a 10% bonus.
- If the sales exceed 25% of the target, reward them with a 25% bonus.

11 For those employees whose **Reward** field reflects as **0**, make sure the corresponding **Bonus** fields reflects as **0** too.

12 Apply conditional formatting to cells in the **Bonus** column.
If a bonus is handed out, the background color in the cells need to be Green.
If no bonus is handed out, the background color should be Grey.

13 Ensure the formatting for the **Bonus** cells is set to Local Currency values.

## Task E – Analyse product sales

The client wants you to analyse the impact of product sales on the quarterly sales. The client is expecting a big order from a major client. You have to use the data obtained from **Task B** and analyse the impact of the additional order coming in.

1 Create two new worksheets in the workbook **SalesFor**. Name it **Product1** and **Product2**.

2 Navigate to **Forecast1**, copy cells **A1** to **H2** and link them into **Product1**.

3 Navigate to **Forecast2**, copy cells **A1** to **H2** and link them into **Product2**.

4 Navigate to **Product1**. Add a formula in cell **I2** and calculate the total sales in the year 2017.
- Add a formula in cell **J2**, which calculates the expected sales in 2017, assuming the growth expected is 17% in the first two quarters and 34% in the third and fourth quarter.
- Add a formula in cell **K2**, which calculates the expected sales in 2017, assuming the growth expected is 17% on the 2017 total sales.

5 Navigate to **Product2**. Add a formula in cell **I2** and calculate the total sales in the year 2017.
- Add a formula in cell **J2**, which calculates the expected sales in 2017, assuming the growth expected is 20% in the first two quarters and 4% in the third and fourth quarter.
- Add a formula in cell **K2**, which calculates the expected sales in 2017, assuming the growth expected is 20% on the 2017 total sales.

6 Centre align all the columns and embolden cells **J2** and **G2**.

## Task F – Answer questions

1 Using the **Answers 327 X** document provided, explain how to present and format spreadsheets effectively to meet needs.
(Provide two points)

2 Using the **Answers 327 X** document provided, explain two methods that can be used to summarize data in spreadsheets.

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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