



BSBTEC302

ASSESSOR GUIDE

Design and produce spreadsheets

Assessment 5 of 5

Project

Assessment Instructions

Task overview

For this assessment task, you are required to plan, design, produce and finalise spreadsheet charts.

Additional resources and supporting documents

To complete this assessment, you will need:

- Access to your learning materials.
- Access to a computer, Internet, spreadsheet, and email software.
- Digital device user information.
- CBSA Business Budget as completed and retained from Assessment Task 4.
- CBSA Style Guide (located on LMS).
- Email Template CBSA (located on LMS).
- Organisational policies and procedures, i.e., ergonomics, work periods and breaks, and sustainability.

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g. allowing additional time)
- the evidence gathering techniques (e.g. oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Task instructions: Spreadsheet Chart 4

For this assessment task, you are required to plan, design, produce and finalise spreadsheet charts. You will also demonstrate how you can use the help function to help rectify issues.

You will use the CBSA Business Budget as completed and retained from Assessment Task 4.

Now read the following email from Gavin Stead, Managing Director at CBSA

Steps

To begin this part, read the following email and its attachment, then complete the tasks that follow.



To: Erin Bright (e.bright@cbsa.com.au)
From: Gavin Stead (gavin.stead@cbsa.com.au)
Date/time: Wednesday 10:05 a.m.
Subject: CBSA Business Budget – Charts.

Good morning, Erin,

I am writing to thank you for your efforts in developing the required CBSA Business Budget spreadsheet. I am impressed with the detail and quality of your work.

I now need you to use the data from the budget to create a few charts for the purpose of analysis. The management team and I need you to create the following three charts:

- Revenue: Actual, Budgeted and Variance.
- Expense: Actual, Budgeted and Variance.
- Net Position: Actual, Budgeted and Variance.

Therefore, extend upon your current CBSA Business Budget Workbook to include another worksheet/or worksheets to cater for these three charts. I would like the charts to be meaningful for the purpose of variance analysis, and I want you to follow our CBSA Style Guide in relation to Logo and Colour Themes.

Mia Clarke, who has recently joined CBSA as a Business Administration Trainee, has asked for some assistance with a couple of excel tips.

Mia is new to spreadsheet software such as MS Excel, and therefore, I would like you to prepare a word document that helps her use the help function, documenting how to use the help function to "Select one or more rows and columns" and "Write an equation or formula", she would also like to see a couple of examples of different chart types.

When complete, please email me your CBSA Business Budget, complete with three charts and be sure to title this file as CBSA Business Budget and Chart v1, along with your word doc tips sheet. I look forward to reviewing your work soon.

Thank you for your assistance.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



1. Carefully read the email from Gavin Stead and then access the following documents:
 - CBSA Business Budget spreadsheet (complete as retained from Assessment Task 4)
 - CBSA Style Guide (located on LMS).
 - Email Template CBSA (located on LMS).

Before you commence your work on the spreadsheet, produce the Tips sheet for Mia.

2. Research chart types that are suitable for the analysis of data.
 - Then, select two different chart types that you could use to display the data.
 - Take a screenshot of each chart type and paste it into the Word document.
 - Using 30 to 50 words, describe when each chart type could be used.
3. Use the help function in your spreadsheet program.
 - Find out how to "Select one or more rows and columns."
 - Take a screenshot of this information and paste it into a Word document
 - Then in the same word document, describe in your own words the steps required to select one or more rows and columns. *(200 to 250 words)*
 - In the spreadsheet Select one or more rows and columns you developed in exercise 4, then take a screenshot and paste it into the Word document.
4. Again, use the help function in your spreadsheet program.
 - Search for help on how to "*Write an equation or formula.*"
 - Take a screenshot of this information and paste it into a Word document
 - Then in the same word document, describe in your own word's steps required to write a short formula using the multiplication function *(80 to 100 words)*
 - In an excel document, type short formula to multiply the contents of two cells.
 - Take a screenshot and paste it into the Word document.
 - Save the word document to your laptop or USB using the following file name: Tips for Budget and Charts v1.
 - You will upload the word document with the spreadsheet at the end of the exercise.
5. Now you must use the data from your developed CBSA Business Budget spreadsheet to create the charts as required. Therefore, it is advised that you extend upon your current spreadsheet workbook by including additional worksheet(s) to capture this information. The three charts which must be developed are as follows:
 - Revenue: Actual, Budgeted and Variance.
 - Expense: Actual, Budgeted and Variance.
 - Net Position: Actual, Budgeted and Variance.Ensure you create chart types suitable for the purpose of variance analysis and use formatting features to present the data in a clear, legible, and meaningful way. For example, chart titles and data labels.
6. Style the three spreadsheet charts as per BD002 CBSA Style Guide in relation to a suitable colour theme and CBSA business logo in order to enhance appearance.
7. Review the three charts to ensure that they are consistent with data requirements (input and output), layout and style. Be sure to check and amend any issues in relation to style and layout.
8. Save the updated CBSA Business Budget spreadsheet to your laptop or USB using the following file name: CBSA business Budget and Charts v1.
9. Finally, compose an email to Gavin Stead – Managing Director (assessor) and attach the updated CBSA Business Budget and Charts spreadsheet.
10. Use the Email Template *Email Template CBSA* provided. Your email must include:

- A brief description summarising the purpose of the email.
- Business Budget including three Charts attached and correct file name, i.e., CBSA Business Budget and Charts v1.
- Your name and position title, i.e., Erin Bright (Administrative Officer) CBSA.

Submission Instructions

Once the above tasks are complete, upload the spreadsheet and the word document to the LMS.

Assessor Instructions

Purpose of task

This task allows the student to demonstrate the fourth instance of planning, designing, producing and finalising a spreadsheet.

The students will also demonstrate how they can use the help function to help them rectify issues

The student will use the CBSA Business Budget as completed and retained from Assessment Task 4.

Guidance to the assessor about the task

This task must be undertaken after the student has completed Assessment Task 4, as the student will use their already completed CBSA Business Budget spreadsheet data to create three charts that are suitable for analysis. Therefore, please ensure that the student has retained the following document from Assessment Task 4:

- CBSA Business Budget spreadsheet.

The assessment begins with an email from Gavin Stead (Managing Director) CBSA to the student playing the role of Erin Bright (Administrative Officer) CBSA concerning updating the business budget to include three charts for variance analysis. Please read the email to familiarise yourself with the required background knowledge.

There is no due submission date for this task. However, students may submit this task when they are ready.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

Marking criteria Spreadsheet Chart 4

Assessment Checklist

Students must have completed all tasks within this assessment before submitting. This includes:

| The following documents | | |
|-------------------------|---|--------------------------|
| 1 | Spreadsheet: CBSA Business Budget and Charts v1 | <input type="checkbox"/> |
| 2 | Word document: Tips for Budget and Charts v1 | <input type="checkbox"/> |
| 3 | Word document: example of an email to Gavin | |

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to **BSBTEC302_05_Business Budget and Charts CBSA_AG.xlsx** for suggested benchmark responses concerning charts.

Students are required to plan, design, produce and finalise spreadsheet charts. To complete this task, the student must undertake the following steps:

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is not yet satisfactory (NYS) and requires resubmission.

| MARKING CRITERIA | | Satisfactory (S) | Not Yet Satisfactory (NYS) |
|--------------------|--|----------------------------|------------------------------|
| Tip sheet | | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 1 | Students must include two chart types to show Mia Clarke | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 2 | Students must include screenshots or the help function and descriptions that paraphrase how to use the "Select one or more rows and columns" and "Write an equation or formula." <ul style="list-style-type: none"> • "Select one or more rows and columns." (200 to 250 words) • "Write an equation or formula." (80 to 100 words) • Show a formula to multiply two cells, such as =Q12*Q13 | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 3 | The tip sheet should be titled "Tips for Budget and Charts v1." | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| Spreadsheet | | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 4 | Students must use the data from their developed CBSA Business Budget spreadsheet to create the charts as required. Therefore, it is advised that students extend their current spreadsheet workbook by including additional worksheet(s) to capture this information. The three charts that the student must develop are as follows: <ul style="list-style-type: none"> • Revenue: Actual, Budgeted and Variance. • Expense: Actual, Budgeted and Variance. • Net Position: Actual, Budgeted and Variance. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 5 | Students must ensure that they create chart types suitable for variance analysis (e.g. bar charts) and use formatting features to present the data clearly, legibly, and meaningfully. For example, Chart titles and data labels (x and y axis). Note: Refer to Excel Workbook CBSA Business Budget and Charts AT5 for suggested responses concerning charts. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 6 | Students must style the three spreadsheet charts as per CBSA's Style Guide concerning a suitable colour theme and CBSA's business logo to enhance appearance. For example, the five primary colours outlined in the Style Guide and the business logo on the worksheet. Note: Refer to Excel Workbook CBSA Business Budget and Charts AT5 for suggested responses concerning charts. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 7 | Students must review the three charts to ensure they are consistent with data requirements (input and output), layout and style. In addition, students must check and amend any issues with style and layout. For example, it is evident that the student has reviewed their three charts as they are free from errors (spelling and function) and are consistent with colour themes, chart layout, data labelling and chart scale, etc. Note: Refer to Excel Workbook CBSA Business Budget and Charts AT5 for suggested responses concerning charts. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 8 | Students must save the updated CBSA Business Budget spreadsheet to their laptop or USB using the following file name: CBSA Business Budget and Charts v1. Note: It is also evident that the student emailed their updated spreadsheet to Gavin Stead (assessor) with the correct file title. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| Email | | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 9 | Students must compose an email to Gavin Stead – Managing Director (assessor), and attach their updated CBSA Business Budget and Charts spreadsheet. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |

| | | | |
|----|---|----------------------------|------------------------------|
| | | | |
| 10 | For this purpose, students must use the Email Template provided on the CBSA intranet. Students' email must include: | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 11 | A brief description summarising the purpose of the email. For example: 'I am writing to confirm that I have completed the three charts requested concerning variance analysis.' | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 12 | Business Budget including three charts attached and correct file name, i.e., CBSA Business Budget and Charts v1. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 13 | Word doc Tips for Budget and Charts v1 | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 14 | Student name and position title, i.e., Erin Bright (Administrative Officer) CBSA. | <input type="checkbox"/> S | <input type="checkbox"/> NYS |

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