# Project Assessment

# Trainer & Assessor Marking Guide

## Criteria

### Unit code, name and release number

BSBITU304 Produce spreadsheets (1)

### Qualification/Course code, name and release number

FNS30317 Certificate III in Accounts Administration (1)

Version: 2.0

Date created: 25/01/2019

Date modified: 25/01/2019

For queries, please contact:

*Technology and Business Services SkillsPoint*

*Building B, Level G, Corner Harris Street and Mary Ann Street, Ultimo NSW 2007*

© 2018 TAFE NSW, Sydney  
RTO Provider Number 90003 | CRICOS Provider Code: 00591E

This assessment can be found in the: [Learning Bank](https://share.tafensw.edu.au/share/access/searching.do?doc=%3Cxml%2F%3E&in=P7ac4831b-430a-4b8d-8b56-f7b32ed5b9cf&q=&type=standard&sort=rank&dr=AFTER)

The contents in this document is copyright © TAFE NSW 2018, and should not be reproduced without the permission of the TAFE NSW. Information contained in this document is correct at time of printing: 3 June 2019. For current information please refer to our website or your teacher as appropriate.

## Assessment instructions

Table 1 Assessment instructions

| Assessment details | Instructions |
| --- | --- |
| **Instructions for the trainer and assessor** | This is a project based assessment and will be assessing the student on their knowledge and performance of the unit.  This assessment is in two (2) parts and includes Assessment Feedback:   1. General task instructions & overview 2. Practical tasks   Model answers, sample responses or a criteria for each question are provided below.  Use these to support your judgement when determining a satisfactory result.  The student’s project/product must contain the information indicated in this marking guide in order to deem it satisfactory. However, if a student provides information other than indicated below, and in the professional opinion of the assessor it is appropriate and meets the intent of the criteria, it may be considered correct.  The assessment feedback page must be signed by both the student and the assessor so the student displays that they have received, understood and accepted the feedback.  Complete the assessment feedback to the student and ensure you have taken a copy of the assessment prior to it being returned to the student. |
| **Assessment location** | Assessment can be completed out of class. |
| **Supervision** | This is an unsupervised, take-home assessment.  If you are unable to verify the authenticity of the student’s submission you will need to gather additional evidence to confirm that the assessment task was completed by the student. This may include oral questioning, comparison with in-class work samples, or observation.  Any additional questions asked must be recorded in the assessment feedback section. |
| **About this marking guide** | All tasks and activities must responded to correctly in order to satisfactorily complete this assessment event.  Assessors will need to make a judgement call as to whether each answer/response meets the criteria based upon the:   * Rules of Evidence:   + Validity – does the answer address the assessment question and does the evidence reflect the four dimensions of competency?   + Sufficiency – is the answer sufficient in terms of length and depth?   + Currency – has the work been done so recently as to be current?   + Authenticity – is this work the student’s own authentic work? * Principles of Assessment:   + Fairness – individual student’s needs are considered in the assessment process   + Flexibility – assessment is flexible to the individual student   + Validity – any assessment decision is justified, based on the evidence of performance of the student   + Reliability – evidence presented for assessment is consistently interpreted and assessment results are comparable irrespective of the assessor conducting the assessment * Dimensions of Competency   + Task skills   + Task Management Skills   + Contingency Planning Skills   + Job Role Environment Skills |
| **Student must provide** | Pens and paper if required |
| **Assessor must provide** | Computer with spreadsheet software, such as excel, printer and internet access. |
| **Due date**  **Time allowed** | *Enter due date on page 4 of the assessment*  Allow 3 hours to complete this assessment |

## Specific task instructions

The instructions and the criteria in the tasks and activities below will be used by the assessor to determine whether the tasks and activities have been satisfactorily completed. Use these instructions and criteria, as well as the Assessor Checklist at the end of each task to ensure you demonstrate the required skills and knowledge.

## Part 1: General task instructions & overview

## (Includes Scenario, Style Guide Information& Filename Guidelines)

**Overall General Instructions:**

1. You will need access to a computer with an internet connection and Microsoft Excel or alternative spreadsheet software. You will need access to a printer.
2. Complete all tasks in this assessment document.
3. Check all instructions have been followed before printing your tasks. Use the Assessor’s Marking Checklist after each task as a checklist.
4. Ensure you have applied the instructions in the style guide to all spreadsheets.
5. Ensure you proof-read all documents (spelling, grammar, formulas, overall layout etc) and Print Preview your printouts before printing them.
6. You are required to provide usable printouts of each task and present them in Excel.
7. For all tasks print each spreadsheet twice – once showing data and once showing formula unless instructed differently. Ensure your printouts fit on one page using the appropriate software function.

**Scenario**

Wherever possible your spreadsheets should use the most efficient formulas and/or functions, which must demonstrate intermediate functions such as:

* AutoSum Functions
* Average Functions
* Sort Function
* Absolute Cell Reference
* IF Function

You are employed as the Accounts Assistant for The Technology Network (TTN). Part of your role is to produce spreadsheets for your team. You are required to complete four (4) tasks found in Part 2 of this assessment document. All tasks will need to comply with TTN’s style guide.

**File Storage:** Create an electronic folder titled “Accounts Team” and save all documents in this folder.

**File Names:** Save all documents with an appropriate file name followed by Task Number and your name, ie File Name-Task 1 John Smith.

**STYLE GUIDE**

|  |  |
| --- | --- |
|  |  |
| *Main Heading Format:* | **The Technology Network -** Calibri 16pt font, **Bold**, Dark Blue. Merge and centre across the width of the worksheet. |
| *Other Heading Format:* | Calibri 12pt font, **Bold**, Dark Blue |
| *Column Headings* | Calibri 11pt font, **Bold** |
| *Other cells:* | Calibri 11pt font |
| *Number Format* | Numbers representing a dollar value should be formatted as ***Accounting*** with 2 decimal places. Other numbers should have no decimal places, unless indicated otherwise. |
| *Borders:* | Total rows – one line on top and double underline on bottom. Other borders included should assist the spreadsheet to look professional. |
| *Other:* | Keep the number of columns reasonably neat and wrap headings over numbers where possible |
| *Total Rows:* | Bold font and use ‘top and double bottom’ borders on number cells |
| *Header:* | Right – Date |
| *Footer:* | Left – file name |

## Part 2: Practical tasks

**Task 1: Software Help**

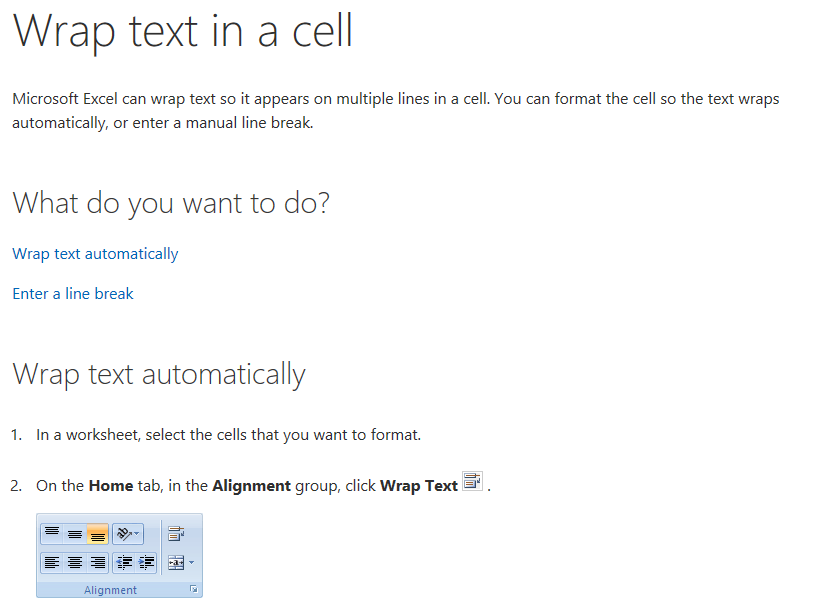
1. Open your spreadsheet software, such as Microsoft Excel.
2. Access the help feature of your software.
3. Search ***wrap text*** and open the result with instructions on how to ***Wrap text in a cell***.
4. Screen Shot or use the Snipping Tool to take a picture of your findings.
5. Print a copy of this picture. You may need to paste the picture into MS Word to print.

### Assessor Checklist

**Assessor to review all documents submitted for the listed task as per the checklist**

**Task 1**

|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| Help instructions on how to ***Wrap text in a cell*** printed |  |  |
| You are only assessing the student can access the Help function in their spreadsheet software. | | |



**Task 2: Plan and Design a Spreadsheet**

Create a spreadsheet to record the monthly sales for the March Quarter AND calculate the monthly, employee and quarter totals. Use your spreadsheet knowledge to plan, design and create the spreadsheet.

1. The following sales data is to be recorded:

|  |  |  |  |
| --- | --- | --- | --- |
| **Edward Williams** | **Nadia Woodward** | **Katherine Cloak** | **Jonathon Roundtree** |
| **Sales for March Qrt**  January $5,400  February $6,325  March $8,700 | **Sales for March Qrt**  January $9,500  February $7,650  March $8,560 | **Sales for March Qrt**  January $7,890  February $6,750  March $9,650 | **Sales for March Qrt**  January $4,870  February $10,560  March $7,700 |

**HINT:** The layout of the data above is not an appropriate layout for your spreadsheet. We are assessing that you can design an appropriate spreadsheet for this task.

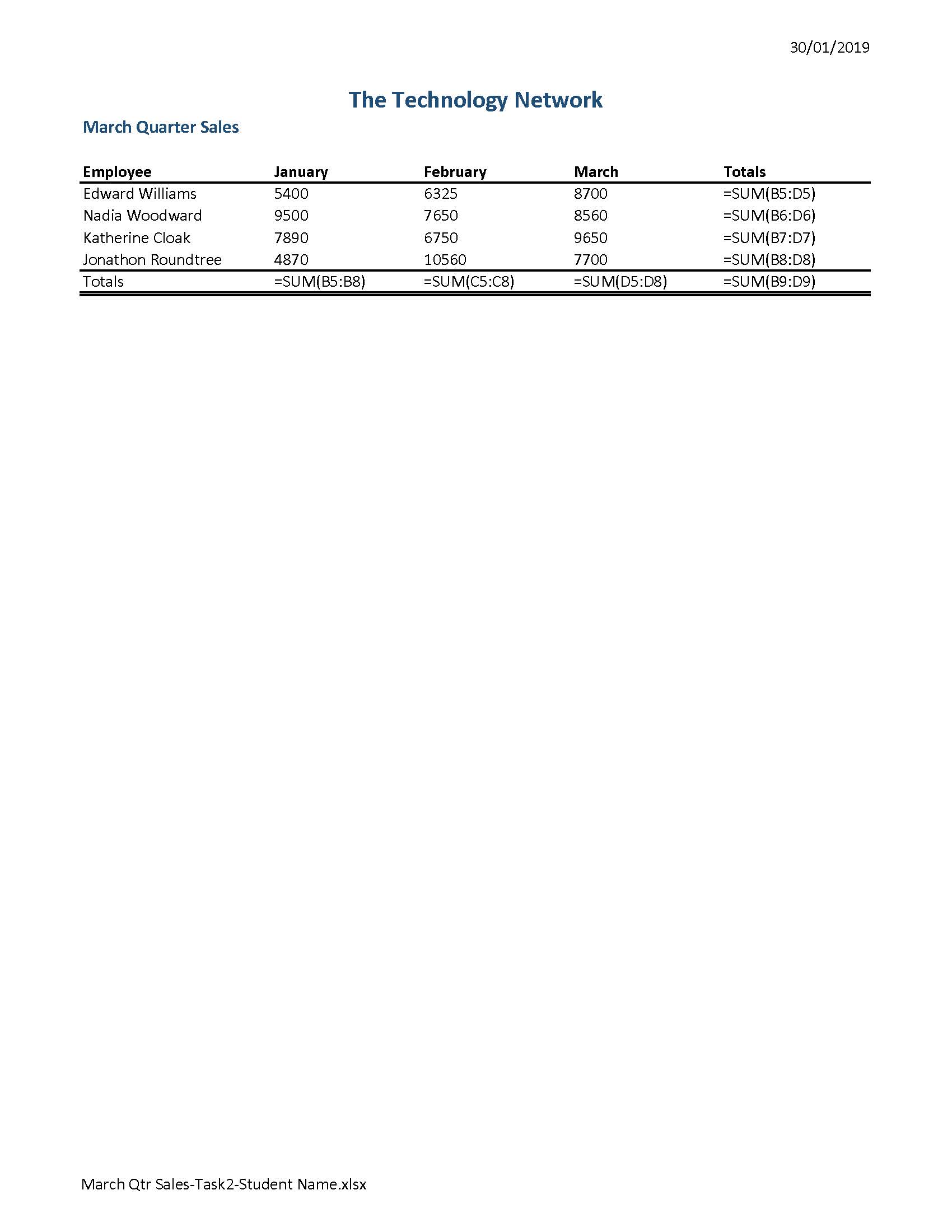
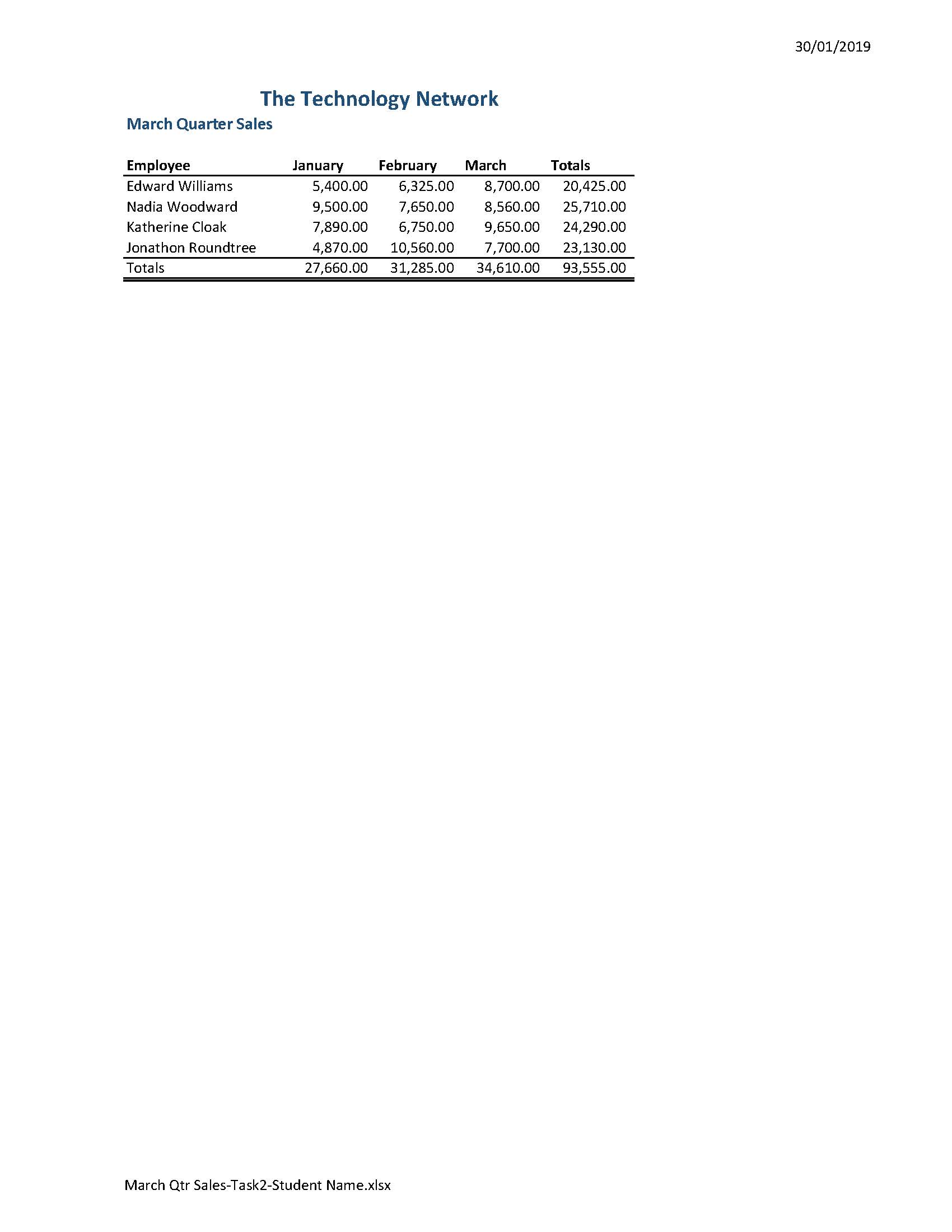
1. Include efficient formula to calculate:
   1. Totals for each month
   2. Totals for each employee
   3. Total for the quarter
2. Save your file as ***March Qtr Sales-Task 2-your name*** in your Accounts Team folder.
3. Add a header and footer as per the style guide on page 6.
4. Apply formatting and borders to your spreadsheet as per the style guide on page 6.
5. Spellcheck and proofread.
6. Print twice – once showing data and once showing formula. Ensure the printouts fit on one page.
7. Save and close your file.

### Assessor Checklist

**Assessor to review all documents submitted for the listed task as per the checklist**

**Task 2**

|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| Heading formatted correctly |  |  |
| Sub-Heading formatted correctly |  |  |
| Column Heading formatted correctly |  |  |
| Data formatted correctly |  |  |
| Columns width adjusted appropriately to fit all data |  |  |
| Any borders included look professional |  |  |
| Totals border is correctly formatted |  |  |
| Data is entered correctly |  |  |
| Appropriate formula/functions used |  |  |
| Header and Footer as per Style Guide |  |  |
| File Name |  |  |
| Data view printed to fit one page |  |  |
| Formula view printed |  |  |
| **Assessor Comments** | | |
| Use the checklist above to check the student has completed all requirements of the spreadsheet. Total border on the suggested solution is required, other borders should look professional using your own professional judgement. Suggested solutions for data and formula view follows. Use this comments box to provide feedback on this task. | | |



**Task 3: Amend Spreadsheet and Column Chart**

1. Open your file ***March Qtr Sales-Task 2-your name*** from Task 2.
2. Save your file as ***March Qtr Sales Chart-Task 3-your name*** in your Accounts Team folder.
3. The following employee sales were not provided before you completed the original spreadsheet. Add their sales to the spreadsheet, ensure your totals update.

|  |
| --- |
| **Julia Young** |
| **Sales for March Qrt**  January $6,850  February $7,410  March $6,355 |

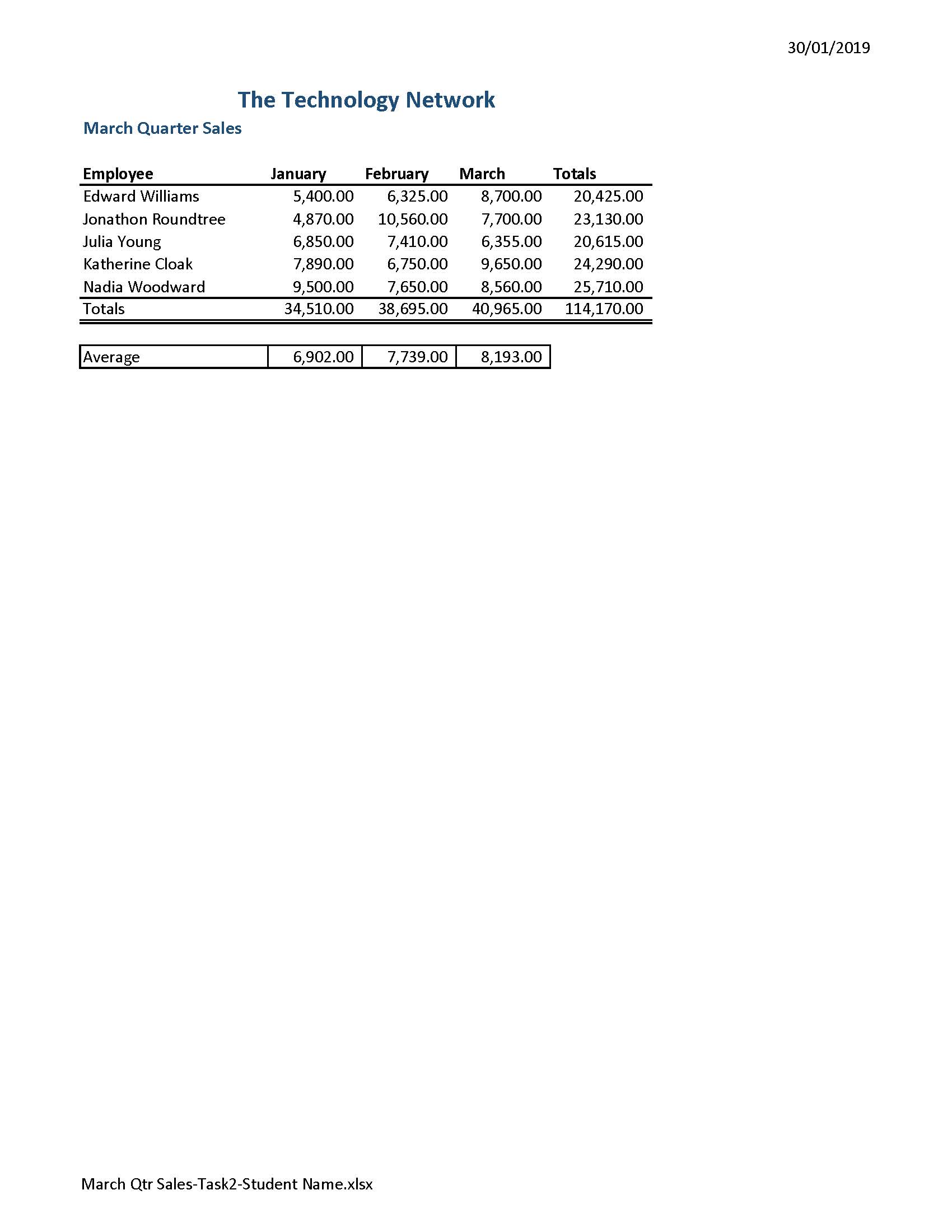
1. Sort the spreadsheet by the Employee’s first name in ascending order (A-Z).
2. Under your spreadsheet add a row to calculate the average sales for each month.
3. Print twice – once showing data and once showing formula. Ensure the printouts fit on one page.
4. Insert a Column Chart on a new sheet to show results for all employees for each month.
5. Switch Row/Column, so the chart compares each employee for each month.
6. Add a chart title, ***March Quarter Employee Sales*** and a legend.
7. Change the sheet name to March Qtr Sales.
8. Add your name and the sheet (tab) name to the footer.
9. Print your chart.
10. Save and close your file.

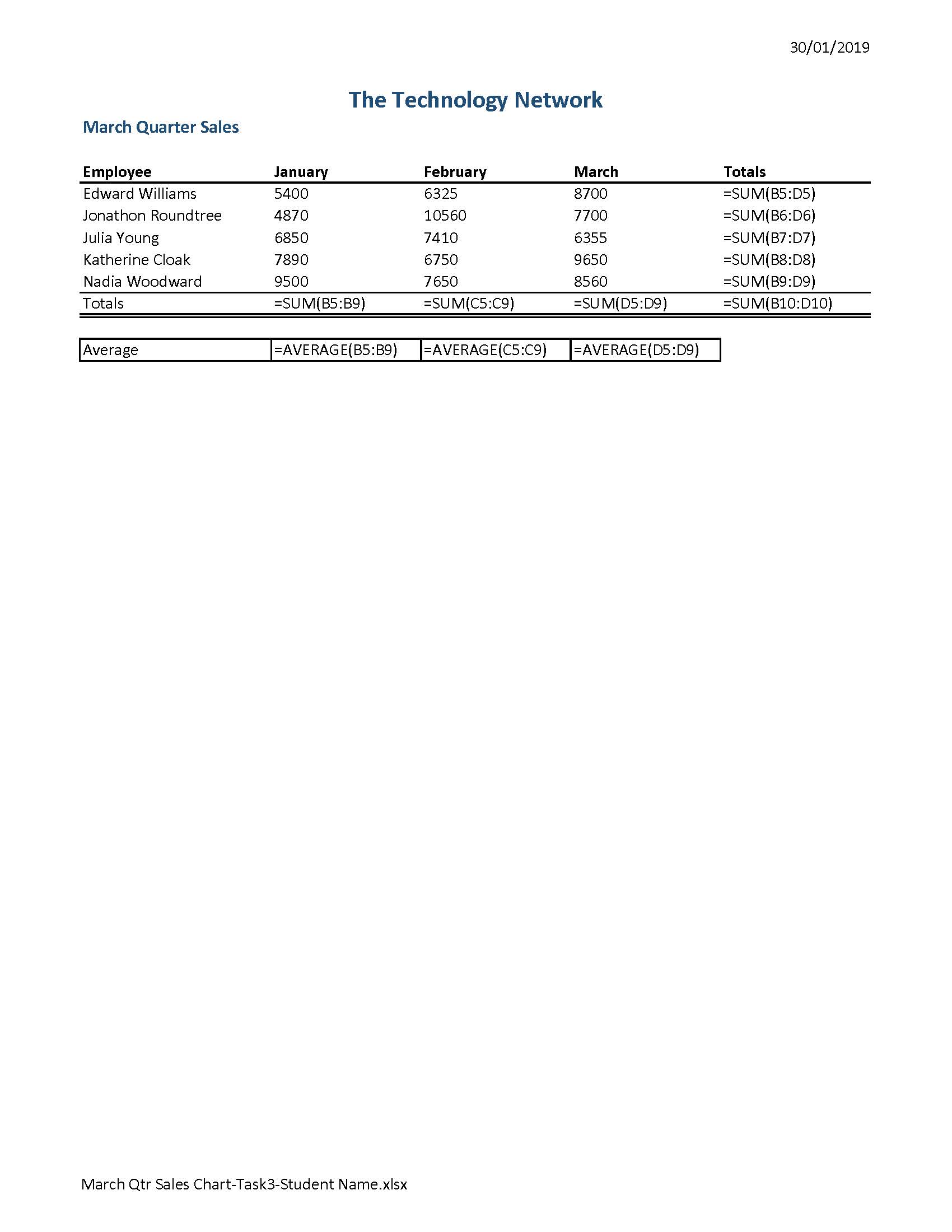
Assessor Checklist

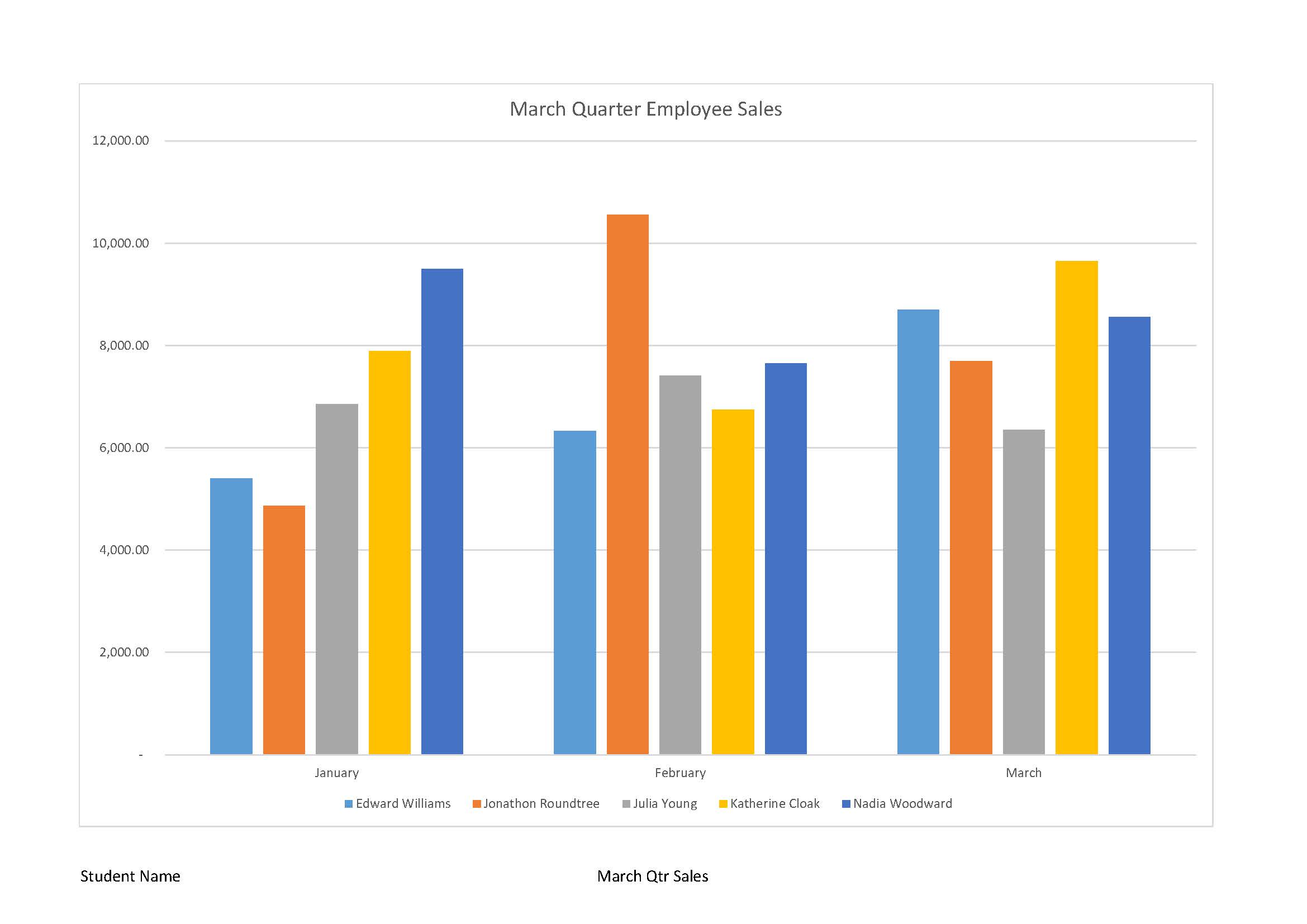
**Assessor to review all documents submitted for the listed task as per the checklist**

**Task 3**

|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| New Data is entered correctly |  |  |
| Data sorted correctly |  |  |
| Average row added |  |  |
| File Name |  |  |
| Appropriate formula/functions used |  |  |
| Data view with chart printed to fit one page |  |  |
| Formula view printed |  |  |
| Column Chart – correct data used, legend used appropriate title added, footer |  |  |
| Chart printed |  |  |
| **Assessor Comments** | | |
| Use the checklist above to check the student has completed all requirements of the spreadsheet. Suggested solutions for data and formula view follows. Example of column chart has been provided, alternate colours, placement of legend or use of 3D column chart is acceptable. Use this comments box to provide feedback on this task. | | |







**Task 4: Commission**

Our sales team are entitled to commission and possibly a bonus if certain sales targets are met.

1. Setup a new spreadsheet and add the following information:

|  |  |  |  |
| --- | --- | --- | --- |
| Commission Rate | 6.00% |  |  |
|  |  |  |  |
| **Employee** | **Total June Quarter Sales** | **Commission** | **Bonus** |
| Edward Williams | 130,033.00 |  |  |
| Nadia Woodward | 154,008.00 |  |  |
| Katherine Cloak | 98,589.00 |  |  |
| Jonathan Roundtree | 87,159.00 |  |  |
| Julia Young | 127,657.00 |  |  |
| Claude Barre | 118,436.00 |  |  |

1. Include an appropriate heading and sub-heading at the top of your spreadsheet
2. Save the spreadsheet as ***June Qtr Commission Bonus-Task 4-your name***.
3. Calculate the commissions for each employees. Add a formula to the commission column calculating 6% of each employee’s June Quarter total, using an **absolute cell reference** in your formula.
4. Employees who make sales of $120,000 or more per quarter receive a $2,000.00 bonus. In the bonus column determine who is entitled to the bonus by creating an **IF Function** to say $2,000.00 or $0.00 for each employee.
5. Add a total row at the bottom of the spreadsheet, formatting it as per style guide on page 6.
6. Add a header and footer as per the style guide on page 6.
7. Apply formatting and borders to your spreadsheet as per the style guide on page 6.
8. Spellcheck and proofread.
9. Verbally confirm the formulas you have used in this spreadsheet with your teacher/assessor. Confirm if the teacher would like to check your formulas on screen or have you print a copy.

Student is to demonstrate they can orally communicate to exchange information to determine whether formulae used will produce the desired result. Determine if you would like the student to print a copy of the data and formula view to have your conversation or if you will look at the formulas on their computer screen. See suggested solutions to correct formulas for this task.

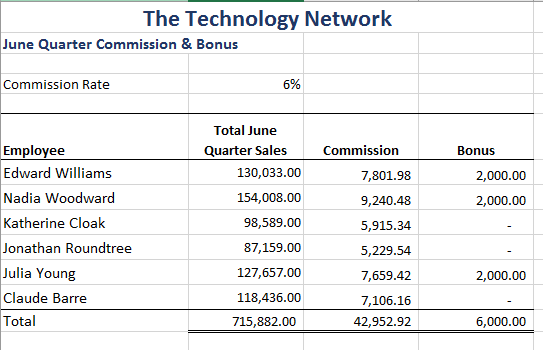
1. Print twice – once showing data and once showing formula. Ensure the printouts fit on one page.
2. Save and close your file.

### Assessor Checklist

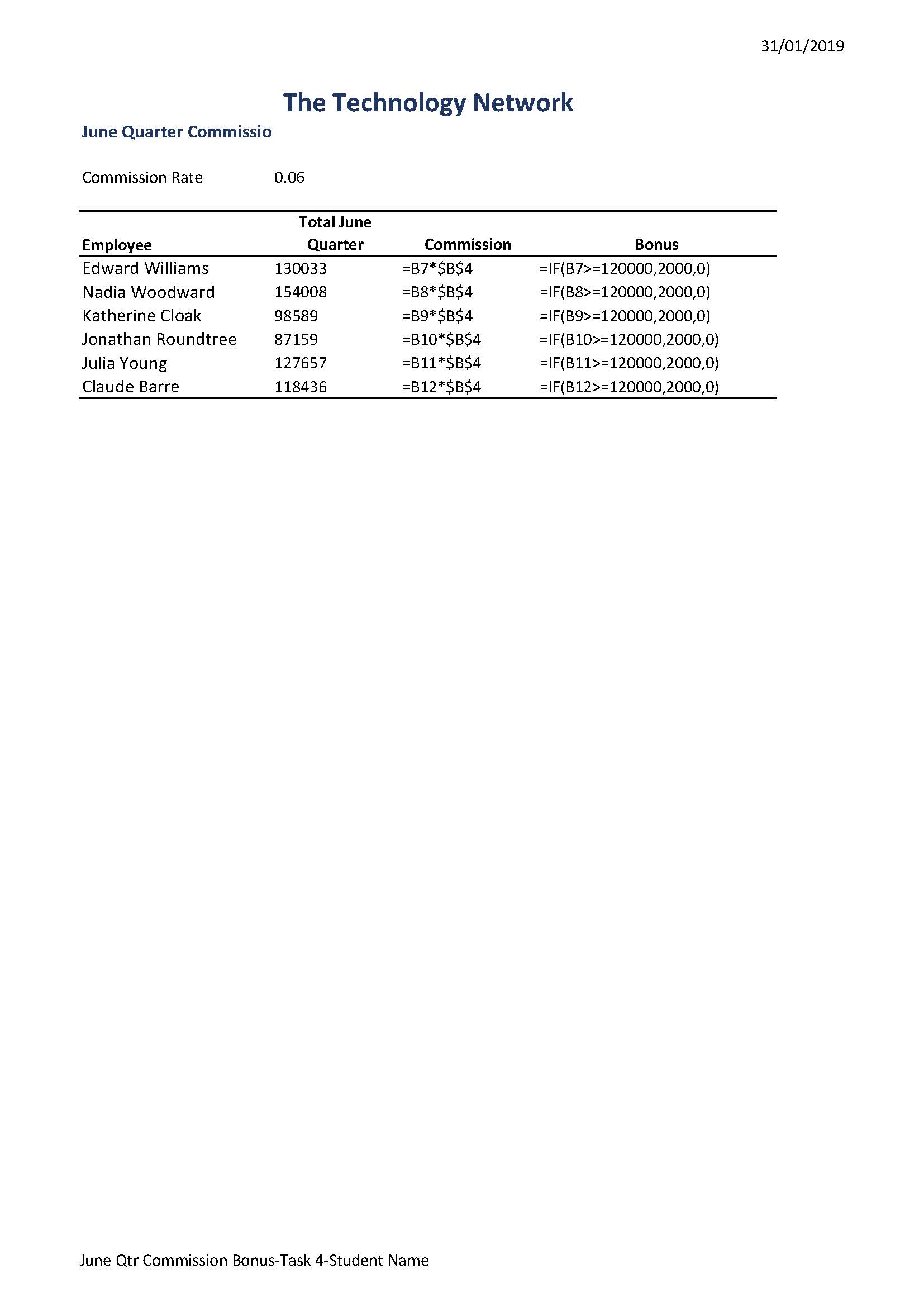
Assessor to review all documents submitted for the listed task as per the checklist

**Task 4**

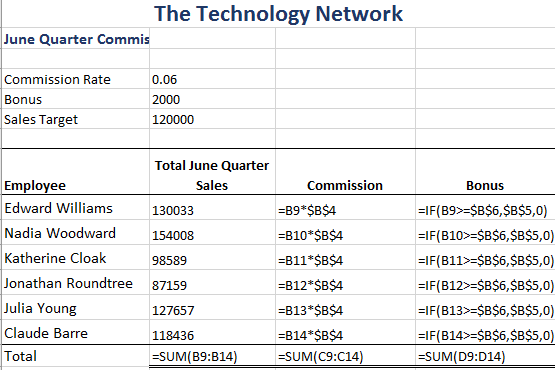
|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| Verbally requested teacher/assessor to check formulas prior to finalising task |  |  |
| Heading formatted correctly |  |  |
| Sub-Heading formatted correctly |  |  |
| Column Heading formatted correctly |  |  |
| Data formatted correctly |  |  |
| Columns width adjusted appropriately to fit all data |  |  |
| Any borders included look professional |  |  |
| Totals border is correctly formatted |  |  |
| Data is entered correctly |  |  |
| Appropriate formula/functions used |  |  |
| Header and Footer as per Style Guide |  |  |
| File Name |  |  |
| Data view printed to fit one page |  |  |
| Formula view printed |  |  |
| **Assessor Comments** | | |
| Use the checklist above to check the student has completed all requirements of the spreadsheet. Borders should look professional using your own professional judgement. Suggested solutions for data and formula view follows. Use this comments box to provide feedback on this task. Two formula view solutions have been provided for this task. The first formula view is the minimum requirement for this level of spreadsheets. The alternate solution has used a more advanced IF function incorporating absolute cell references for the Bonus, that some students may already have the skills and knowledge to use. This alternative answer should also be deemed satisfactory. | | |



Formula View – minimum requirements:

****

Formula View – alternative IF function for Bonus:



**Task 5: Amend a Spreadsheet and Choose a Chart**

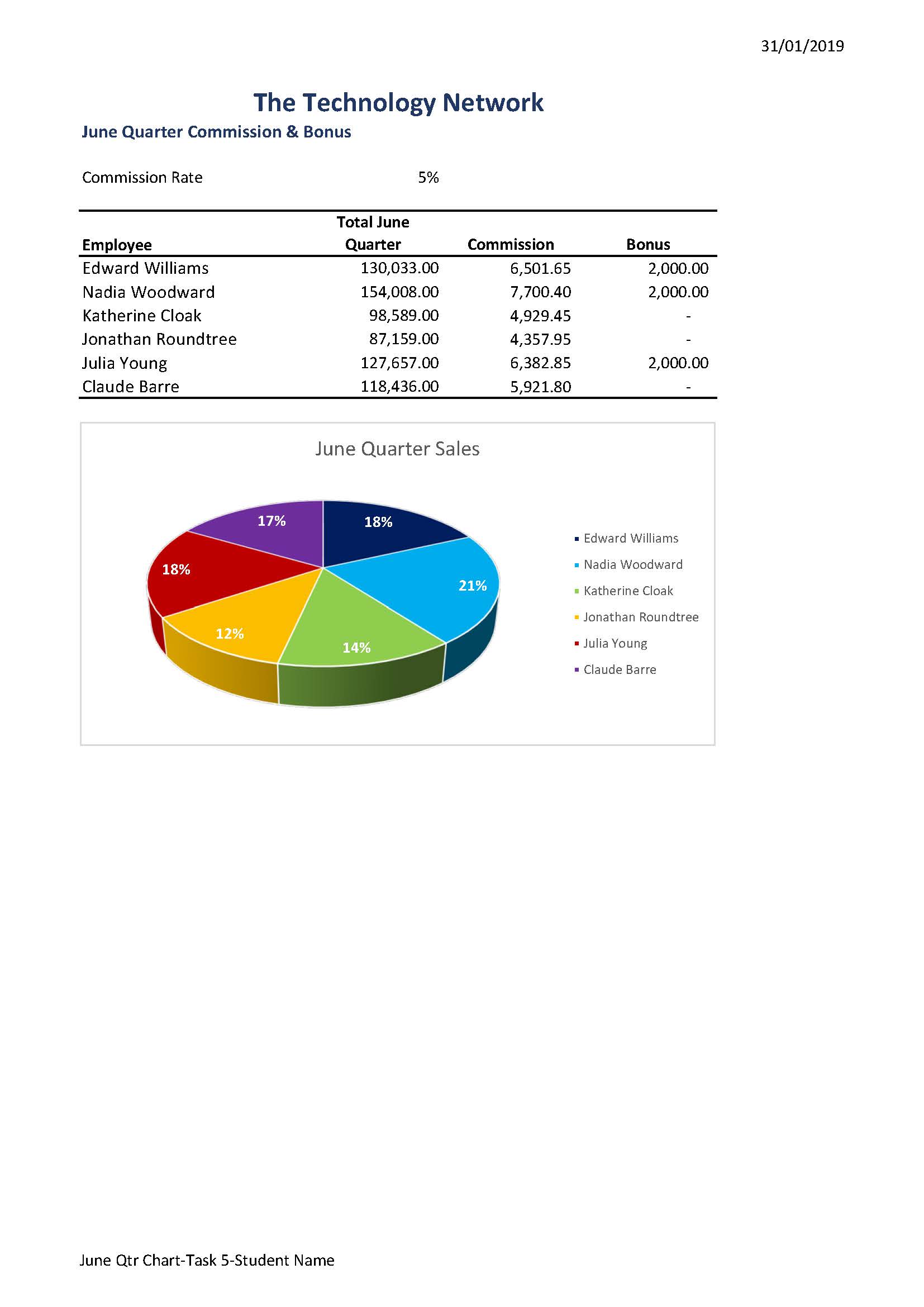
1. Open ***June Qtr Commission Bonus-Task 4-your name***.
2. Save As ***June Qtr Chart-Task 5-your name.***
3. Change the commission rate to 5%.
4. Create a chart that displays the Total June Quarter sales for each employee. Use an appropriate chart type that will show which employee has the larger percentage of sales against all other employees.
5. Place your chart neatly under your spreadsheet.
6. Use appropriate labels, including percentages.
7. Adjust your colours from the default colours.
8. Adjust your labels so they are easier to read.
9. Add the chart title “June Quarter Sales”.
10. Print your spreadsheet and chart in data view with your chart.
11. Save and close your file.

Assessor Checklist

**Assessor to review all documents submitted for the listed task as per the checklist**

**Task 5**

|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| Sales Target percentage changed |  |  |
| Appropriate Chart chosen – correct data used, legend used and appropriate title added |  |  |
| Chart contains – percentages, labels and chart title |  |  |
| Chart colours have been changed |  |  |
| Chart labels are easy to read |  |  |
| File Name |  |  |
| Data view with chart printed to fit one page |  |  |
| **Assessor Comments** | | |
| Use the checklist above to check the student has completed all requirements of the spreadsheet. Suggested solutions for data and formula view follows. The student is to choose an appropriate chart for this task. The most suitable chart is a pie chart. Example of a pie chart has been provided, alternate colours, placement of legend or use of 2D pie chart is acceptable. Use this comments box to provide feedback on this task. | | |



**Task 6: File Management**

1. Go to your ***Accounts Team*** folder.
2. Screen Shot or use the Snipping Tool to take a picture of your Accounts Team folder with all of your files.
3. Print a copy of this picture. You may need to paste the picture in word.

Assessor Checklist

**Assessor to review all documents submitted for the listed task as per the checklist**

**Task 6**

|  |  |  |
| --- | --- | --- |
| Were the following all addressed | Yes | No |
| Accounts Team folder setup |  |  |
| All assessment spreadsheets stored in Accounts Team folder. |  |  |
| You are checking that the student has followed the naming and storing requirements for this assessment. The “Accounts Team” can be stored on the PC, student drive at TAFE or their USB. | | |

