



**BSBTEC302**

# **Design and Produce Spreadsheets**

## **Assessment 3 of 5**

**Project 2 (Weekly Sales Report and Chart)**

**ASSESSOR GUIDE**



## Assessment Details

### Task overview

The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, you must access the information and documents associated with CBSA, as listed under 'Additional resources and supporting document'. These are provided for you on the LMS under 'Assessment 3'. Once you click on the documents, they will download automatically.

For this assessment, you must plan, design, produce and finalise a Weekly Sales Report spreadsheet and chart.

Read the instructions carefully before you commence.

### Additional resources and supporting documents

To complete this assessment, you will need:

- Spreadsheet Planning Template [provided on LMS]
- CBSA Style Guide [provided on LMS]
- CBSA Email Template [provided on LMS]



### 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

### Weekly Sales Report and Chart

To begin, read the following e-mail and its attachment, then complete the following tasks.



To: Erin Bright [e.bright@cbsa.com.au]  
From: Gavin Stead [gavin.stead@cbsa.com.au]  
Date/time: Thursday 11:45 a.m.  
Subject: Weekly Sales Report and Chart [spreadsheet]  
Attachments: Weekly Sales Data,  
Spreadsheet Planning Template

Good morning Erin,

This morning, I am writing to you as I would like you to plan, design, produce and finalise a Weekly Sales Report spreadsheet and chart for one of our valued clients.

The client in question is a medium-sized sales business. I want this spreadsheet document developed to provide insight into team performance and inform managers of the progress towards achieving sales goals.

Using this information, managers will be able to organise one-on-one coaching sessions with individual team members as well as adjust weekly forecasted sales and revenue figures.

Complete the Spreadsheet Planning Template to ensure a sound understanding of the task requirements before you create the spreadsheet and chart.

Review the Weekly Sales Data provided at the end of this email. Access and use Microsoft Excel to organise the data in a tabular format. Perform the following calculations/formulae based on the figures provided:

- Calculate 'Total Weekly Sales' for each team member.
- Calculate the 'Variance'. The variance is the difference between the total weekly sales and the weekly forecast sales. Calculate the variance for each team member. Should you discover any negative variances [ $<0$ ], highlight these figures and cells in red.
- Calculate the 'Total Weekly Commission' for each team member at \$10 per sale.

Save the Excel workbook as BSBTEC302\_AT3\_Weekly Sales Report and Chart\_V1.

Based on the data generated in Excel, I need you to create a chart of your choice (line chart, etc.) to show a pictorial representation of each team member's actual sales for the week compared to their forecast sales for the week. Make sure this chart is suitable for analysis as it will be used by management to view team member performance.

Apply the CBSA Style Guide as downloaded from our LMS concerning typography. However, please note that you may select your own 'colour theme' and apply your choice spreadsheet design elements. Ensure your selections suit the purpose and audience, enhancing both presentation and readability.

Once complete, carefully read over the document to ensure information accuracy and design consistency. Then, save the document and store it on your PC/laptop.

Finally, please e-mail me your completed Spreadsheet Planning document and finalised Weekly Sales Report spreadsheet and chart for my review.

I want this spreadsheet document developed within the next 7 to 10 days as I must disseminate this information as soon as possible.

Be advised that you must use a spreadsheet software application such as MS Excel to complete this task as it is compatible with the client's software, policies, and procedures.

Thank you for your assistance. I look forward to hearing from you soon.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

[www.cbsa.com.au](http://www.cbsa.com.au)



## ATTACHMENTS

### E-mail Attachment 1: Weekly Sales Data

| Weekly Sales Data  |        |         |           |          |        |
|--|--------|---------|-----------|----------|--------|
|  | Monday | Tuesday | Wednesday | Thursday | Friday |
| Tim  | 2      | 3       | 0         | 3        | 2      |
| Harpreet   | 2      | 2       | 2         | 1        | 1      |
| Frank  | 4      | 6       | 2         | 4        | 6      |
| Cindy  | 2      | 0       | 0         | 3        | 3      |
| Maree  | 3      | 4       | 2         | 0        | 2      |
| Dave   | 5      | 6       | 7         | 8        | 3      |
| Jackie   | 6      | 7       | 3         | 6        | 6      |
| Rob  | 2      | 1       | 4         | 2        | 5      |
| Josie  | 0      | 4       | 5         | 3        | 4      |
| Brett  | 7      | 6       | 4         | 2        | 6      |
| <b>Forecasted Sales</b><br>These are forecasted total weekly sales: <ul style="list-style-type: none"><li>• Harpreet, Cindy = 10 sales each.</li></ul> |        |         |           |          |        |

- Tim, Maree, Rob, Josie = 15 sales each.
- Brett = 20 sales.
- Frank, Dave, Jackie = 25 sales each.

## E-mail Attachment 2: Spreadsheet Planning Template

| Spreadsheet Planning Template  |   |
|--|---|
| Planning and design topics and key questions   | Planning and responses<br><i>Use the space below to write your plans and response to each question.</i>   |
| <b>Task purpose</b><br>Why is the spreadsheet needed?<br><i>[30-40 words]</i>                    | <b>Marking criteria</b><br><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i><br><br><i>The spreadsheet is being developed for a medium-sized sales business.</i><br><br><i>It is being developed to provide insight into team performance and inform managers of the progress towards achieving sales goals.</i>  |
| <b>Audience</b><br>Who will be using the spreadsheet?<br><i>[40-60 words]</i>                    | <b>Marking criteria</b><br><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i><br><br><i>Managers will use the spreadsheet data to make decisions about team member performance. Therefore, data must be clear, concise, and accurate.</i><br><br><i>Using spreadsheet information, managers can organise one-on-one coaching sessions with individual team members and adjust weekly forecasted sales and revenue figures.</i> |
| <b>Data entry</b><br>What data needs to be entered into the spreadsheet?<br><i>[20-30 words]</i> | <b>Marking criteria</b><br><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i><br><br><i>The data to be entered into the spreadsheet includes Team member names.</i><br><br><i>Actual sales for each day of the week (Mon – Fri).</i>   |

| Spreadsheet Planning Template   |   |
|---|---|
| Planning and design topics and key questions  | Planning and responses<br><i>Use the space below to write your plans and response to each question.</i>   |
| <p><b>Saving and storage</b></p> <p>How will the spreadsheet documents be saved?<br/><i>[50-100 words]</i></p>              | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>The spreadsheet document must be saved and stored on my PC/laptop.</i></p> <p><i>The file will be titled: Weekly Sales Report and Chart V1.</i></p> <p><i>I must save the document regularly to minimise the risk associated with data loss.</i></p> <p><i>I will e-mail the final version of the spreadsheet document to Gavin Stead once complete.</i></p>                        |
| <p><b>Output required</b></p> <p>Make a simple sketch to indicate the type of output required.<br/><i>[50-60 words]</i></p> | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>The required output includes Each team member's total sales for the week and their commission.</i></p> <p><i>The 'variance' is the difference between the total weekly sales as compared to the forecasted weekly sales. I must calculate the variance for each team member. If I discover any negative variances (&lt;0), I must highlight these figures and cells in red.</i></p> |
| <p><b>Timeline</b></p> <p>When is the spreadsheet due?<br/><i>[10-20 words]</i></p>   | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>I have seven to ten days to complete the spreadsheet and chart.</i></p>   |

| Spreadsheet Planning Template  |   |
|--|---|
| Planning and design topics and key questions   | Planning and responses<br><i>Use the space below to write your plans and response to each question.</i>   |
| <p><b>Software Application</b></p> <p>Which application meets requirements concerning resources, policies, and procedures?<br/><i>[20-40 words]</i></p>                  | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>I have been informed that I must use a spreadsheet application such as MS Excel as this meets task and organisational requirements.</i></p>   |
| <p><b>Organisational requirements</b></p> <p>How will I ensure consistency of design and layout?<br/>Which software functions must I use?<br/><i>[80- 120 words]</i></p> | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>I must ensure that the spreadsheet can be reused or easily modified to produce reports as required by management.</i></p> <p><i>I must ensure that I follow CBSA's Style Guide concerning font style, size, cell alignment, etc. This also includes the following key points:</i></p> <p><i>Headings must be in Calibri 24pt.</i></p> <p><i>Subheadings must be in Calibri 10pt. And Bold.</i></p> <p><i>Standard font to be Arimo 10pt (Note to assessor: if Air font is unavailable to the student, they should use Calibri or Arial).</i></p> <p><i>Red font and shading must be applied to any Negative Values concerning variance.</i></p> |
| <p><b>Presentation</b></p> <p>How can I make the data easy to read?<br/>How will I arrange the data to enhance appearance?<br/><i>[120-160 words]</i></p>                | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>I will use a standard columns and rows (tabular) design to express all data.</i></p> <p><i>I will ensure that I consider the following design aspects when creating the spreadsheet:</i></p> <p><i>Clear style as per CBSA's Style Guide to present data.</i></p> <p><i>Use of only two fonts as per CBSA's Style guide.</i></p>  |



| Spreadsheet Planning Template  |   |
|--|---|
| Planning and design topics and key questions   | Planning and responses<br><i>Use the space below to write your plans and response to each question.</i>   |
|  | <p><i>Use a clear hierarchy of font sizes as per CBSA's Style Guide. This improves readability and graphics consistency.</i></p> <p><i>I will use white space to improve readability.</i></p> <p><i>I will carefully consider a colour palette, for example, one or two colours that work well together.</i></p> <p><i>I will shade alternate rows to improve readability, for example, using a light grey or blue.</i></p> <p><i>I will use grid lines sparingly and will not place too much emphasis on the individual cell.</i></p> <p><i>I will arrange the data in a logical order.</i></p>  |
| <p><b>Formulae</b></p> <p>What formula must I use?</p> <p>How will I test the accuracy of entered formulas?</p> <p><i>[50-100 words]</i></p> | <p><b>Marking criteria</b></p> <p><i>Aligned with the word count, students must complete the table section showing their planning; a sample answer that could be provided is shown below.</i></p> <p><i>I will use the following formulae:</i></p> <p><i>Team member sales per day will be added using the AutoSum function (addition).</i></p> <p><i>The variance will be calculated by subtracting the actual sales from forecasted sales.</i></p> <p><i>The commission for each team member will be calculated by multiplying the actual sales by the commission of \$10.</i></p> <p><i>I will check the accuracy of formulas via cross-checking cells with a calculator. I will also view formulas entered into individual cells to ensure they are accurate.</i></p> |

## Task Instructions

You are required to plan, design, produce and finalise a Weekly Sales Report spreadsheet and chart.

To complete this task, you must undertake the following steps:

1. Carefully read the e-mail from Gavin Stead to understand the task purpose, audience requirements, data entry, output, saving and storage, timeline, and presentation requirements. Then, access the following:

- Spreadsheet Planning Template [provided on the LMS]
- CBSA Style Guide [provided on the LMS]
- Email Template [provided on the LMS]

The e-mail from Gavin Stead and the above documents will assist you in successfully planning, designing, producing and finalising the Weekly Sales Report and Chart.

**Important:** You must refer to the above documents throughout this task to meet organisational and task requirements.

2. Using instructions and information contained within the e-mail from Gavin Stead, Weekly Sales Data and [CBSA Style Guide](#), complete the Spreadsheet Planning Template. You must complete all sections and questions as follows:

- Task purpose: Why is the spreadsheet needed?
- Audience: Who will be using the spreadsheet?
- Data entry: What data needs to be entered into the spreadsheet?
- Saving and storage:
  - How will the spreadsheet documents be saved?
- Output required: Make a simple sketch to indicate the type of output required.
- Timeline: When is the spreadsheet due?
- Software Application: Which application meets requirements concerning resources, policies, and procedures?
- Organisational requirements:
  - How will I ensure consistency of design and layout?
  - Which software functions must I use?
- Presentation:
  - How can I make the data easy to read?
  - How will I arrange the data to enhance appearance?
- Formulae:
  - What formula must I use?
  - How will I test the accuracy of entered formulas?

Save your completed Spreadsheet Planning document as "BSBTEC302\_AT3\_Spreadsheet Planning" and upload it to the LMS together.

3. Now that you have completed the Spreadsheet Planning Template, you can complete the Weekly Sales Report spreadsheet and chart. First, select suitable software and equipment to develop the spreadsheet and chart. For example, a PC/laptop, monitor, keyboard, mouse, and spreadsheet application MS Excel.

4. Start by opening a new Microsoft Excel workbook. Input the Weekly Sales data and apply formatting. As you enter the data, review and adjust the workbook to maintain a consistent design and layout, aligning it with the completed Spreadsheet Planning Template.

5. Complete the required formulae/calculations using suitable software functions, including:
  - Calculate 'Total Weekly Sales' for each team member.
  - Calculate the 'Variance' for each team member. Should you discover any negative variances (<0), highlight these figures and cells in red.

**Note:** You will need to add three additional columns to present the above data/output.

  - Calculate the weekly commission for each team member at \$10 per sale. Create an extra table for this information underneath the sales data in the spreadsheet.
6. Ensure all calculated data above is accurate by testing all formulas and confirming that the output is correct. Complete this step as per your completed Spreadsheet Planning Template.
7. In Excel, create a chart suitable for analysis to show a pictorial representation of each team member's sales for the week compared to their forecasted weekly sales. Successfully create the chart using the required data from your completed Weekly Sales Report. You may complete this chart on a second worksheet.

**Note:** You may use a chart and colour theme of your choice; however, it must be suitable for analysis.
8. Use spreadsheet format functions to meet overall spreadsheet presentation requirements. For example, shading, borders, and headings in bold.
9. Apply [CBSA's Style Guide](#) when styling the spreadsheet (typography and text alignment).
10. Once you have completed the Weekly Sales Report, spreadsheet and chart, carefully read/look over these documents (worksheets) to ensure information accuracy and design consistency. For example: cross-check your completed spreadsheet to your plan and provided data.
11. After review, save your completed workbook using the following file name to your PC/laptop:
  - BSBTEC302\_AT3\_Weekly Sales Report and Chart\_V1.
12. Write an e-mail of about 30-50 words to Gavin Stead – Managing Director, providing a summary of the purpose of the e-mail and attaching your completed Spreadsheet Planning document and the Weekly Sales Report and Chart. Use the e-mail template provided for this purpose.

Your e-mail must cover the following points:

- A brief description summarising the purpose of the e-mail.
  - The Spreadsheet Planning document is attached to the e-mail using the correct file name: BSBTEC302\_AT3\_Spreadsheet Planning
  - The spreadsheet is attached to the e-mail using the correct file name: BSBTEC302\_AT3\_Weekly Sales Report and Chart\_V1.
  - Timeframe by which you developed the spreadsheet.
  - Your name and position title.
13. Save your e-mail as a Word document titled "BSBTEC302\_AT3\_Email "and upload it to the LMS together with the planning document and the spreadsheet for marking.

Lastly, exit the software application (i.e., MS Excel) without any loss of data.

# Email Template

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**To:** Gavin Stead [gavin.stead@cbsa.com.au]  
**From:** Erin Bright (e.bright@cbsa.com.au)  
**CC:**  
**BCC:**  
**Date/time:** <<Add the time and date of the email here>>  
**Subject:** Weekly Sales Data and Spreadsheet Planning Template  
**Attachments:** Weekly Sales Report and Chart V1

Good morning Gavin

I am writing to advise that I have completed the Weekly Sales Report and Chart as requested. I was able to complete the spreadsheet within the seven-to-ten-day timeframe. A copy of the spreadsheet is attached to the e-mail.

Please let me know if you have any questions.

Kind regards,  
Erin Bright

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300 Fictional Way, Sydney, NSW 2000  
Phone: 1800 111 222  
[www.cbsa.com.au](http://www.cbsa.com.au)



## Assessment checklist:

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

|  |                          |
|--|--------------------------|
| Complete Spreadsheet Planning Template [following steps 1-2]   | <input type="checkbox"/> |
| Complete the Weekly Sales Report and Chart [following steps 3-11]  | <input type="checkbox"/> |
| Write an email to Gavin Stead specifying the completion of the planning document and the Weekly Sales Data spreadsheet [following steps 12-13] | <input type="checkbox"/> |



Congratulations, you have reached the end of Assessment 3!

## Assessor instructions: Weekly Sales Report and Chart

### Purpose of task

This part is designed to ensure students can demonstrate the ability to plan, design, produce and finalise a Weekly Sales Report spreadsheet and chart using suitable software. Students will follow organisational task requirements, enter formulae, create charts, and apply design, style, and layout elements.

### Guidance to the assessor about the task

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

For students to undertake this task, you must ensure they have access to the following documents:

- E-mail from Gavin Stead [as this e-mail outlines task instructions].
- Spreadsheet Planning Template [Provided at the end of the email from Gavin Stead and also available on LMS]
- Weekly Sales Data [Provided at the end of the email from Gavin Stead]
- CBSA Style Guide [provided on LMS]
- Email Template [provided on LMS]

These documents will provide the student with the necessary planning/design and data to create the Weekly Sales Report spreadsheet and chart.

The assessment begins with the e-mail from Gavin Stead (Managing Director) CBSA to the student playing the role of Erin Bright (Administrative Officer) CBSA concerning the development of a Weekly Sales Report spreadsheet and chart. Therefore, please read the e-mail to familiarise yourself with the required background knowledge and organisational task instructions.

### Student tasks

Students are required to plan, design, produce and finalise a Weekly Sales Report spreadsheet and chart.

To complete this task, students must undertake the steps outlined in the student instructions.

Please refer to *BSBTEC302\_03\_Weekly Sales Report\_AG* for suggested responses.

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

## Assessment submission checklist

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

| The following documents |  |                          |
|-------------------------|--|--------------------------|
| 1                       | Word document: Spreadsheet Planning Template | <input type="checkbox"/> |
| 2                       | Spreadsheet: Weekly Sales Report and Chart   | <input type="checkbox"/> |
| 3                       | Word document: example of an email to Gavin  | <input type="checkbox"/> |

## Marking criteria: Weekly Sales Report and Chart

### Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the [BSBTEC302\\_03\\_Weekly Sales Report\\_AG.xlsx](#) for sample answers and benchmarks.

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]   |
|------------------|---|----------------------------|------------------------------|
| 1.               | <p>The student's submission met organisational and task requirements by referring to the following documents to prepare their Spreadsheet Planning Template and the Weekly Sales Data spreadsheet:</p> <ul style="list-style-type: none"> <li>E-mail Spreadsheet Planning Template. Students are to use this for planning and design purposes.</li> <li>E-mail Weekly Sales Data. Students must enter this information into the spreadsheet.</li> <li>CBSA's Style Guide. Students must follow this for basic style requirements (typography).</li> </ul> | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 2.               | <p>The student completed all sections and questions of the Spreadsheet Planning Template using instructions and information from the e-mail from Gavin Stead, Weekly Sales Data and CBSA Style Guide:</p> <ul style="list-style-type: none"> <li>Task purpose.</li> <li>Audience.</li> <li>Data entry.</li> <li>Saving and storage.</li> <li>Output required.</li> <li>Timeline.</li> <li>Software Application.</li> <li>Organisational requirements.</li> <li>Presentation.</li> <li>Formulae.</li> </ul>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 3.               | <p>The student's selected suitable technology and software to develop the spreadsheet and chart:</p> <ul style="list-style-type: none"> <li>PC/laptop, monitor, keyboard, mouse.</li> <li>A spreadsheet application such as MS Excel.</li> </ul>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| 4.               | <p>The student's entered data provided - Weekly Sales Data in a new Excel workbook. Checked and amended the workbook as they entered data to ensure consistency of design and layout as per the completed Spreadsheet Planning Template:</p> <ul style="list-style-type: none"> <li>The data entered is accurate as per Weekly Sales Data.</li> <li>Data is easy to read [clear/legible]</li> </ul>   | <input type="checkbox"/> S | <input type="checkbox"/> NYS |

| MARKING CRITERIA   | Satisfactory (S)           | Not Yet Satisfactory (NYS)   |
|--|----------------------------|------------------------------|
| <ul style="list-style-type: none"> <li>• Team member names are accurate as per Weekly Sales Data.</li> <li>• Data is presented logically:               <ul style="list-style-type: none"> <li>○ Team members aligned to daily sales figures.</li> <li>○ Team members' total sales.</li> <li>○ Team members forecasted sales.</li> <li>○ Team member variance.</li> </ul> </li> </ul>  |                            |                              |
| <p>5. The student's completed the required formulae/calculations using suitable software functions. Must include:</p> <ul style="list-style-type: none"> <li>• Calculate 'Total Weekly Sales' for each team member:               <ul style="list-style-type: none"> <li>○ Each team member's sales per day (Mon to Fri) have been totalled. The formula is clear and accurate within the cell/formulae bar.</li> </ul> </li> <li>• Calculate Commission) for each team member at \$10 per sale.               <ul style="list-style-type: none"> <li>○ Each team member's commission is calculated. The formula is clear and accurate within the cell/formulae bar.</li> </ul> </li> <li>• Calculate the 'Variance' for each team member:               <ul style="list-style-type: none"> <li>○ The variance between each team member's total sales and forecast sales has been realised. The formula is clear and accurate within the cell/formulae bar.</li> </ul> </li> <li>• Any negative variances (&lt;0) have been highlighted in red (cells and font) by the student:               <ul style="list-style-type: none"> <li>○ The student has identified that the following team members have a negative variance: Tim, Harpreet, Frank, Cindy, Maree, and Rob. Note: students must add two additional columns to present the above data/output.</li> </ul> </li> </ul> | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| <p>6. The student's submission demonstrated that formulae were Tested, and calculated data (point 5 above) was checked for accuracy and confirmed that the output was correct.</p> <ul style="list-style-type: none"> <li>• The student completed this step as per their Spreadsheet Planning Template, e.g., it is evident that the student has tested formulas as clear and correct as per point five above.</li> </ul>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| <p>7. The student created a chart to show a pictorial representation of each team member's sales for the week compared to their forecasted weekly sales. Students must:</p> <ul style="list-style-type: none"> <li>• Select a chart type and design that offers an analysis of numerical data.</li> <li>• Successfully create the chart using the required data field (Note: students may complete this chart on a second worksheet), e.g.:               <ul style="list-style-type: none"> <li>○ A bar chart has been selected which highlights each team member's actual sales performance as compared to forecast</li> <li>○ The chart is suitable for analysis.</li> <li>○ The data has been taken from the student's completed Weekly Sales Report.</li> </ul> </li> </ul>   | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| <p>8. The student used spreadsheet format functions to meet overall spreadsheet presentation requirements, e.g.:</p> <ul style="list-style-type: none"> <li>• Shading</li> <li>• Borders</li> <li>• Bold.</li> <li>• Conditional Formatting.</li> <li>• Cell alignment, etc.</li> </ul>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS |
| <p>9. The student applied conventions of the CBSA Style Guide when styling the spreadsheet (typography and text alignment):</p>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS |

| MARKING CRITERIA |   | Satisfactory<br>[S]        | Not Yet<br>Satisfactory<br>[NYS] |
|------------------|---|----------------------------|----------------------------------|
|                  | <ul style="list-style-type: none"> <li>Applied typography for headings and sub-headings [Arimo]<br/>Note: Arial/Calibri is used if Arimo is not available.</li> <li>Centred headings and text.</li> </ul>   |                            |                                  |
| 10.              | <p>The student's weekly Sales Report and Chart are correct and consistent with the student's developed Planning Template (style, design, layout, formulas) and the data provided in the task instructions.</p> <p>All data and information are accurate per organisational (CBSA) and task requirements.</p>  | <input type="checkbox"/> S | <input type="checkbox"/> NYS     |
| 11.              | <p>The student saved their completed workbook according to instructions.</p> <ul style="list-style-type: none"> <li>The student saved the spreadsheet using the correct file name to their PC/laptop: BSBTEC302_AT3_Weekly Sales Report and Chart_V1</li> </ul>   | <input type="checkbox"/> S | <input type="checkbox"/> NYS     |
| 12.              | <p>The student submitted their completed Weekly Sales Report and Chart via e-mail to Gavin Stead – Managing Director.</p> <p>Students' e-mail included:</p> <ul style="list-style-type: none"> <li>A brief description summarising the purpose of the e-mail, e.g., "I am writing to advise that I have completed the spreadsheet planning document and the Weekly Sales Report and Chart as requested".</li> <li>The Spreadsheet Planning document is attached to the e-mail using the correct file name: BSBTEC302_AT3_Spreadsheet Planning</li> <li>The spreadsheet is attached to the e-mail using the correct file name: BSBTEC302_AT3_Weekly Sales Report and Chart_V1</li> <li>Timeframe by which the student developed the spreadsheet, e.g., "I was able to complete the spreadsheet within the seven-to-ten-day timeframe".</li> <li>Student name and position title, e.g., Erin Bright, Administrative Officer.</li> </ul> | <input type="checkbox"/> S | <input type="checkbox"/> NYS     |

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