BSBTEC402

# Design and produce complex spreadsheets

## Assessment 2 of 3

## Project 1

ASSESSOR GUIDE

Version 1 August 2024

## Assessment Instructions

### Task overview

The assessment consists of two (2) tasks:

- Task 1 - Design an infographic poster regarding the ergonomic requirements of a computer workstation set-up
- Task 2 - Plan two (2) complex spreadsheets

The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, you will need to access the information, documents and templates associated with CBSA. These documents have been provided to you on the learning platform under the Assessment 2 tab.

CBSA is a consultancy service business that provides compliance, financial, human resources, information technology support, and other business services to ensure that businesses have the expertise and support they need to be competitive and prosper. Before commencing this assessment, you should familiarise yourself with what CBSA does, its services, history, organisational structure, employees, mission, vision and business goals. This information can be found in CBSA's Business Plan.

For this assessment, you are required to assume the role of Robyn Willis, Junior Accountant at CBSA.

### Additional resources and supporting documents

To complete this assessment, you will need to access the following resources, all provided on LMS:

- Business Plan
- Workstation Setup (Ergonomics) document
- CBSA Style Guide
- Officewise – A guide to health & safety in the office
- Budgeted Planning Project Financial Data
- Budgeted Planning Template
- Budgeted vs Actual Planning Template
- Data Management Policy
- Email template
- Voice Message

## 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.

## Task 1

### Task Summary

You are required to design an infographic poster to demonstrate your understanding of the ergonomic requirements related to your computer workstation set-up.

### Equipment required

- Access to a suitable simulated computer workstation environment
- Mobile phone with a camera

To complete this assessment task, you must read the following email and then complete the tasks that follow.

| | |
|---|---|
| To: | Robyn Willis (robyn.willis@cbsa.com.au) |
| From: | Gavin Stead (gavin.stead@cbsa.com.au) |
| Date/time: | Monday 12 Jan 20XX 10:45 a.m. |
| Subject: | Workstation set-up for employees working from home (ergonomics) |
| Attachments: | Workstation Setup (Ergonomics)<br>Style Guide |

Good morning Robyn,

I trust you are well. After reading a recent study from Microsoft entitled 'Work Without Walls', CBSA has decided to trial allowing employees to work from home if it is reasonably practical to do so. I would like you to assist with the implementation of this new initiative. Specifically, I would like you to assist our Work Health and Safety (WHS) representative in managing the ergonomic set-up of computer workstations for employees electing to work from home. As you are aware, the Work Health and Safety Act 2011 still applies if workers work somewhere other than their usual workplace, including working from home.

You did such a great job creating the 'Keep Our Workplace Safe' infographic poster. I would greatly appreciate it if you could design another poster that demonstrates correct working posture and positioning and adjustment of the following items:

- chair and desk
- monitor
- keyboard and mouse
- telephone
- other items such as placement of stapler, pens, documents etc.

I would like you to include **two (2)** photos of yourself demonstrating correct working posture so employees understand how they must be seated at their computer workstation. Also, include **one (1) energy** and **one (1) resource conservation technique** staff can apply in their home working environment.

I have attached CBSA's current Workstation Setup (Ergonomics) document from our workplace policies and procedures in consideration of my request. You will see that it covers all the above areas. I have also included a copy of our Style Guide, which provides guidelines for presenting our brand from both a visual and formatting perspective. Ensure you refer to these documents when creating the poster.

You can also research further information about workstation set-up by accessing the *Officewise – A guide to health & safety in the office* guideline, developed by WorkSafe Victoria. We have also used this document when developing our WHS policy.

Kind Regards,

Gavin Stead

Managing Director - CBSA

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

### Task 1 - Student Instructions

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

1. Access CBSA's Business Plan (provided on LMS) and familiarise yourself with what CBSA does, its services, history, organisational structure, employees, mission, vision and business goals.

2. Carefully read the email sent to you by Gavin Stead (Managing Director), including the following attachments:
   - Workstation Setup (Ergonomics) document (provided on LMS)
   - Style Guide (provided on LMS)

   As you read the Workstation Setup (Ergonomics) document, you must consider the correct workstation set-up regarding:
   - chair
   - desk
   - computer monitor
   - keyboard
   - mouse
   - telephone
   - other key objects such as a stapler, pens, papers/documents.

   As you read the CBSA Style Guide document, you must consider and consistently adhere to CBSA's brand identity, including:
   - colour palette
   - typography
   - font
   - use of logo
   - poster layout
   - use of images.

3. Think about the various features of the workstation setup as above, then complete further reading to aid your understanding. For further information, access the *Officewise – A guide to health and safety in the office* document (provided on the LMS), developed by WorkSafe Victoria.

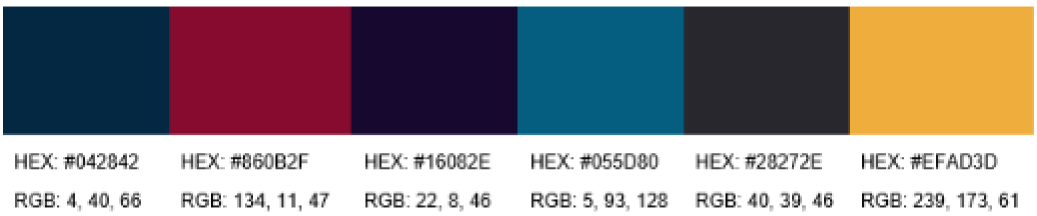
4. Using Microsoft Word, create an A3 infographic poster that demonstrates the correct workstation setup, working posture and positioning and adjustment of the following items:
    - chair and desk
    - monitor
    - keyboard and mouse
    - telephone
    - other items such as placement of stapler, pens, documents etc.

5. The poster must also include:
    - **two (2)** photos of yourself personally demonstrating your posture while seated at your workstation
    - **two (2)** activities which can be undertaken during rest or break times, such as eye breaks and exercise breaks
    - **one (1) energy** and **one (1) resource conservation technique.**

**After completing this assessment task, save the infographic poster as a pdf file on your desktop using the following naming convention:** ***BSBTEC402_02_Poster_Student Name*****.**

**Task 1 and 2 must be submitted together for marking.**

## Assessor instructions

| ASSESSOR TO COMPLETE:<br>Evidence checklist and submission requirements | |
|---|---|
| Assessors can use this checklist that identifies the benchmarks for competency and compare the evidence samples with the benchmarks to make a judgement on the student's competency.<br><br>The student's evidence submission will vary as each will have their own creative approach in meeting the infographic poster design brief.<br><br>The student must demonstrate their ability to:<br>▪ Organise personal work environment in accordance with ergonomic requirements<br>▪ Recognises and follows explicit and implicit protocols and meets expectations associated with own role<br>▪ Follow organisational and safe work practices<br>▪ Ensure consistency of style, design and layout. | |
| The student's Infographic poster must use the correct style and formatting, including:<br><br><u>Colour Palette</u><br>The colour palette students can use include the following six primary colours.<br><br><br> | ☐ |

Typography and Font

The following typography and font must be used; however, the sizing of the text can be adjusted to suit the poster: ☐

# Header 1 Arial 24pt

## Header 2 Arial 18pt

### Header 3 Arial 14pt

**Header 4 Arial 12pt. Black bolded.**

Logo

The Logo used can be in one of two coloured styles ☐

CBSA
COMPLETE BUSINESS SOLUTIONS AUSTRALIA

CBSA

Document Size

The infographic poster must be A3 (29.7 x 42.0 cm) in size. ☐

Poster Layout ☐

The name of the document must be included in the bottom right-hand corner

Version Control ☐

Version control must be included in the bottom left-hand corner using the format – Version Month Year.

Design ☐

Design of the infographic poster must:

- focus on your major points
- let images and graphs tell the story
- use text sparingly
- keep the sequence well-ordered and obvious.

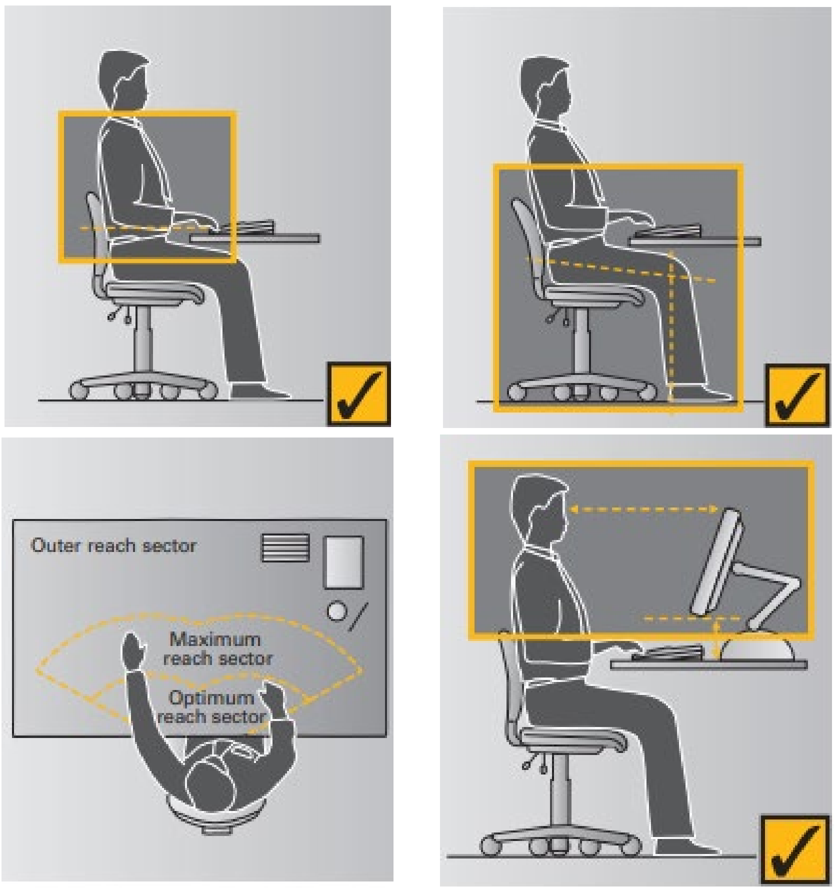
The students' infographic poster must demonstrate the correct workstation setup, working posture and positioning and adjustment of tools and equipment. The following topics must be covered:

Chair and Desk Setup

The student may include images and information on: ☐

- Adjusting chair height
  - Sit up straight on your chair, allow your arms to hang loosely by your sides.

| | |
|---|---|
| – Make a right angle at your elbow and keep your wrist straight.<br>– The underside of your hand should now sit naturally on top of your keyboard.<br>– If this is not the case, adjust your chair height to enable your hand to rest on the keyboard.<br>▪ Other adjustments<br>– Adjust the back in or out, up or down etc., so that you can feel the lumbar support in the lower curve of your back.<br>– The lumbar support should be both firm and comfortable while providing support for the natural curve of your back.<br>– Make sure the angle of the seat's base is either neutral or tilted slightly forward to make sure the front of the chair is not pushing into your thighs.<br>– If your chair has armrests be sure to position them so that they fit under the desk. This ensures that nothing stops you from sitting close and working with your arms relaxed.<br>▪ Chair posture<br>– Sit with correct posture.<br>– Be mindful of your posture at all times, making sure that your spine remains lifted, with your shoulders rounded back. | |
| <u>Monitor Position</u><br>The student may include images and information on:<br>▪ Computer monitor and stand<br>– Adjust the monitor height so that the top of the screen is at or slightly below eye level.<br>– Your eyes should look slightly downwards when viewing the middle of the screen.<br>– Position your monitor at arm's length away from your body.<br>▪ Screen brightness<br>– Adjust screen brightness and contrast for clear, comfortable viewing. | ☐ |
| <u>Keyboard and Mouse positioning</u><br>The student may include images and information on:<br>▪ Keyboard<br>– Have your keyboard positioned in front of you, not to the side.<br>– Make sure the keyboard is as central as possible.<br>– Your keyboard should be positioned at the same height as the elbows and forearms, your shoulders should feel relaxed by your side.<br>– The keyboard (similar to the mouse) should be positioned close to the front of the desk so that you do not need to stretch to use them.<br>▪ Wrist rest<br>– With elbows at the desk level, ensure that your wrists are straight, hands at or below elbow level. Use a wrist rest if required.<br>▪ Mouse<br>– Position the mouse as close as is practical to the keyboard so that both elbows are directly under the shoulders while working. | ☐ |

| | |
|---|---|
| ▪ Mouse pad<br>– Place your mouse within easy reach and on the same surface as your keyboard.<br>– Use a soft mouse pad and avoid pressing your hands or forearms against the desk edge.<br><br><u>Telephone Placement</u><br>The student may include images and information on:<br>▪ Placing your phone on speaker or use a headset rather than cradling the phone between your head and neck.<br><br><u>Other items</u><br>The students may include images and information on:<br>▪ Keeping key objects such as your telephone, stapler or printed materials close to your body to minimise reaching. | ☐ |
| The student must include two (2) photos of themselves personally demonstrating the correct working posture as per the benchmark answer below.<br><br><br><br><br>Content.api.worksafe.vic.gov.au. 2022. [online] Available at: <https://content.api.worksafe.vic.gov.au/sites/default/files/2018-06/ISBN-Officewise-guide-to-health-and-safety-in-the-office-2006-01.pdf> [Accessed 20 January 2022]. | ☐ |

| | |
|---|---|
| The student must include two (2) activities that can be undertaken during rest or break times. This could include images and information on:<br>▪ Stop, get up and move<br>▪ S-t-r-e-t-c-h and check<br>▪ neck stretches<br>▪ shoulder rolls<br>▪ wrist, hand and elbow stretches<br>▪ upper and lower back stretches<br>▪ back arching<br>▪ pectoral stretches<br>▪ foot pumps<br>▪ eye exercises<br>▪ visual rest | ☐ |
| The student must include **one (1) energy** and **one (1) resource conservation technique:**<br>▪ **Resource conservation** must be centred around sustainability:<br>– reduce the amount of waste you create<br>– reuse items that could have a future purpose<br>– recycle whatever you can<br>▪ **Energy conservation** must be centred around saving energy:<br>– switching off lights<br>– turning off equipment when not in use<br>– shutting down computers and turning off lights and appliances at the end of the day<br>– ensuring air conditioning and heating systems are set to timers | ☐<br>☐ |

## Task 2

### Task Summary

For this assessment task, you are required to plan **two (2)** complex spreadsheets.

**Important**: This assessment must be undertaken before Assessment 3 Task 1 as it directly relates to the preparation and planning of the two (2) spreadsheets which will be developed in Assessment 3 Task 1.

To complete this assessment task, you must read the following email and then complete the tasks that follow.

| | |
|---|---|
| To: | Robyn Willis (robyn.willis@cbsa.com.au) |
| From: | Gavin Stead (gavin.stead@cbsa.com.au) |
| Date/time: | Wednesday 14 Jan 20XX 9:30 a.m. |
| Subject: | CBSA – Meeting Requested (Annual Budget) |
| Attachments: | Budgeted Planning Project Financial Data<br>Budgeted Planning Template<br>Budgeted vs Actual Planning Template<br>Email Template<br>Data Management Policy |

Good morning, Robyn,

I am writing to you as I would like to request your professional assistance to help draft our CBSA budget spreadsheet documents.

I am keen to get your input in relation to the architecture of these complex spreadsheet documents with regards to aesthetics, readability and functionality. The reason for this is that our management team will use the financial data contained within these spreadsheets, for example, projected income and expenses for a 12-month period, in order to monitor CBSA's financial activity. Therefore, these spreadsheets must be accurate, clear, legible and functional for management use and decision-making.

Considering the above important aspects, I would like you to prepare a plan to develop the following two complex spreadsheets that cover the period of July, August and September.

1. Budgeted: This spreadsheet must specify CBSA's budgeted revenue and expenditure.
2. Budgeted vs Actual: This spreadsheet must specify CBSA's budgeted revenue and expenditure as compared to the actual revenue and expenditure. **Please note:** Graphs will be required.

Please find attached CBSA's Financial Data, which you must use to plan and later develop the above spreadsheets.

To plan, design and later produce these spreadsheet documents, ensure you follow CBSA's Style Guide, which I have also attached.

To successfully plan the required **two (2)** spreadsheets, you will need to:

- consider the design and preparation of the above two complex spreadsheets. Think about software functions and formulae as well as the presentation and readability of data.
- read over the Budgeted Planning Project Financial Data as attached to familiarise yourself with data input.
- review our business's Style Guide to familiarise yourself with the correct layout, fonts, colour schemes etc.

I have also attached our Data Management Policy. Please ensure you read CBSA's naming convention and document storage guidelines. May Lee will contact you and provide you with further instructions on how to name and where to store the documents once you have developed them.

I would like to review your plans before you develop each spreadsheet. Once you have completed the spreadsheet planning, please email me as soon as possible with your two completed plans for the development of each spreadsheet document using the attached email template. Include in the email a suggested time frame for completing the spreadsheets.

Please note that I have templates for this purpose, and you will find these templates attached as follows:

- Budgeted Planning Template
- Budgeted vs Actual Planning Template

Thank you for your assistance with this important project, and 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

### Task 2 - Student Instructions

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

1. Carefully read the email from Gavin Stead, including the following documents (available on the LMS) as outlined in the email:
    - Budgeted Planning Project Financial Data
    - Budgeted Planning Template
    - Budgeted vs Actual Planning Template
    - Email Template
    - Data Management Policy

    These documents will provide you with the financial data and templates needed to plan the **two (2)** complex spreadsheets.

    The two complex spreadsheet documents to be planned are as follows:

    - **Budgeted:** This spreadsheet must specify CBSA's projected budgeted revenue and expenditure across July, August and September.
    - **Budgeted vs Actual:** This spreadsheet must specify CBSA's budgeted revenue and expenses as compared to the actual revenue and expenditure across July, August and September.

2. Refer to CBSA's Style Guide to understand the style, headers, and colour scheme to be used when designing and later producing the two spreadsheet documents.

3. Refresh your learning in the LMS and do further research on:

- advanced functions of spreadsheet software applications, for example, MS Excel's mathematical functions and formulas etc
- charts and graph styles in Excel
- spreadsheet design concerning presentation and readability of data/information, for example, MS Excel's conditional formatting etc.

4. Review the Data Management Policy to understand CBSA's naming convention and document storage guidelines, then listen to the voice recording from May Lee regarding how you should name the planning templates. You will need to apply this information when saving the documents. (The voice recording is provided to you on the LMS.)

## Complete the Planning Templates

5. Create a plan for each of the two (2) spreadsheet documents using the templates provided:
    - Budgeted Planning Template
    - Budgeted vs Actual Planning Template

The following additional information needs to be considered when planning the design of the spreadsheets:

**Specific information in relation to the budgeted spreadsheet:**

- The spreadsheet is needed as it will provide a model as to how the business might perform in relation to income and expenditure. It attempts to predict income and expense and, therefore, profitability.
- There will be multiple users. For example, the finance team will use the budget to control income and expenditure. Management will use the budget to provide direction and coordination so that key business objectives can be met. Other department managers will be assigned budgeting responsibilities, and resources will be allocated to each team based on these figures. Therefore, all figures must be accurate and legible.
- Use the following formals to calculate Gross Profit and Net Position for the purpose of these spreadsheet documents:
    - Revenue less Cost of Goods Sold (COGS) equals Gross Profit.
    - Gross Profit less other expenses plus other revenue equals Net Position.

**Specific information in relation to budgeted vs actual spreadsheet:**

- The spreadsheet will be used for variance analysis. A budget variance is a difference between the budgeted amount of the expense or revenue and the actual amount. The budget variance is considered favourable when the actual revenue is higher than the budget or when the actual expense is less than the budget.
- The spreadsheet requires graphs. You must create the following **three (3)** graphs:
    - Graph showing budgeted (target) versus actual revenue for July, August and September
    - Graph showing budgeted (target) versus actual expense for July, August and September
    - Graph showing budgeted (target) versus actual profit for July, August and September.
- There will be multiple users. Finance will use variance analysis to help maintain control over expenses by monitoring planned costs versus actual costs. Senior management will use variance analysis to spot trends, issues and opportunities as well as threats.

**Additional information in relation to document design**

- In relation to data entry, all data must be entered manually. Therefore, you must access Excel and create a new workbook/spreadsheet. Ensure all data entered is clear and accurate.
- You must create a **linked solution.** The spreadsheets and graphs can be created in a single Excel workbook.
- You must give the spreadsheet a title, version number and save it electronically onto your desktop as per CBSA's Data Management Policy and the voice message from May Lee.
- Once the spreadsheet planning documents have been developed, a copy of the completed templates must be provided to Gavin Stead.
- The two spreadsheet documents are to be developed within a two-week timeframe.
- Ensure there is space for output. The spreadsheets must be easy to read and presented on one page/worksheet. All data must be presented in a logical and meaningful way. For example:
    - All revenue items and totals
    - Cost of Goods Sold (COGS)
    - All expense items and totals
    - Net position.
- You must follow CBSA's Style Guide when planning the spreadsheets.
- In relation to the colour scheme, you can use the colour palette as indicated in CBSA's Style Guide, or you may choose to select similar/complementary colours. However, you must make sure you are consistent in the application of colour.
- There is a need for the spreadsheets to be linked. For example, link Budgeted vs Actual to Budgeted figures.
- In relation to cell format and attributes:
    - ensure that the figures are expressed in currency terms by adding the dollar ($) symbol to these cells
    - headings can be 'Wrap Text' as needed
    - all headings must be aligned in the same consistent manner
    - figures must be aligned in a consistent and meaningful way that is easy to read.
- The spreadsheets must be flexible so that they can be modified in the future, i.e., the addition of data, changes of formula and future automation (macro).

Once the two plans have been developed, they must be submitted to Gavin Stead via email using the email template provided. Please refer to point six (6) below in relation to email submission requirements.

**<u>Write email</u>**

6. Compose an email to Gavin Stead – Managing Director and attach your plans for the two complex spreadsheets. Use the email template provided for this purpose. In the email include:
    - a brief description summarising the purpose of the email
    - completed templates for the two complex spreadsheets attached to the email:
        - Budgeted Planning Template
        - Budgeted vs Actual Planning Template
    - timeframe by which you must develop the two complex spreadsheets
    - your name and position title.

Save the email using the following naming convention:

- BSBTEC402_02_Email_Student Name

## Create voice recording

7. Consider **two (2)** questions you could ask May Lee – Finance Manager to clarify how you should save and store the two (2) complex spreadsheet documents you will develop in Assessment 3 Task 1.

   Create a voice recording asking the two questions you have developed to demonstrate your questioning skills.

   The voice recording must be no longer than **5 minutes** in length.

   Consent to participate in the recording must be captured at the start of the voice recording. This is achieved by you reading the following statement at the start of the recording.

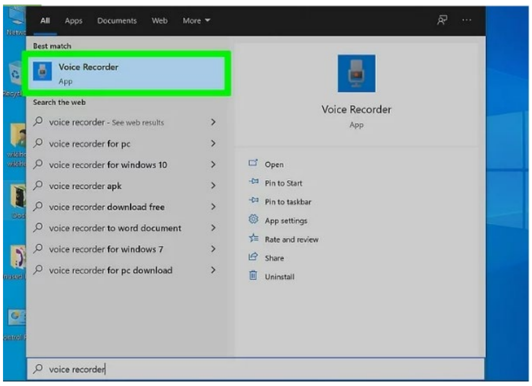
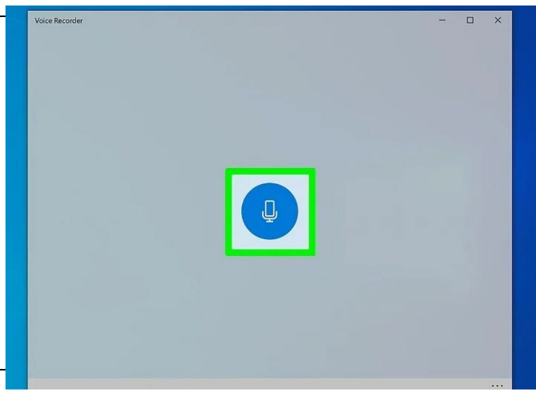
   *"This recording is for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. I indicate consent to be recorded by stating my name and student number."*

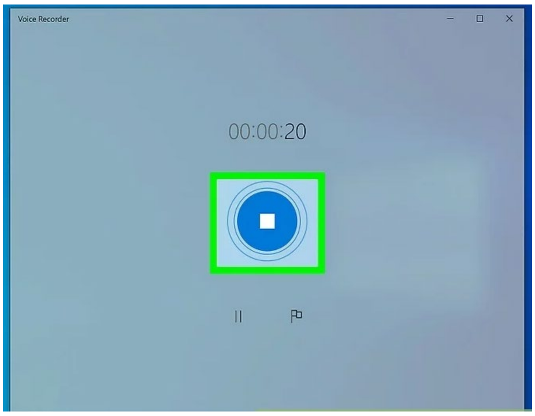
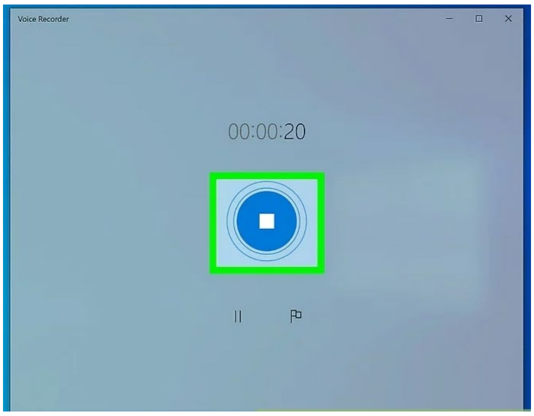
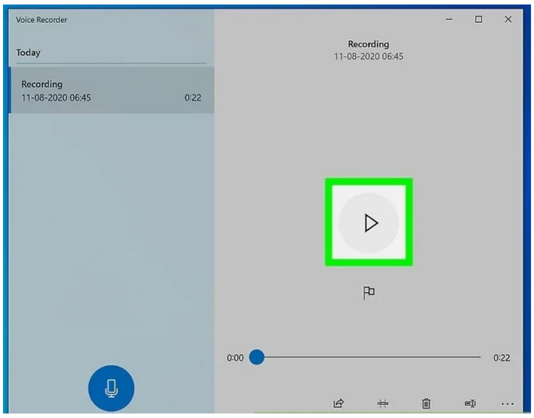
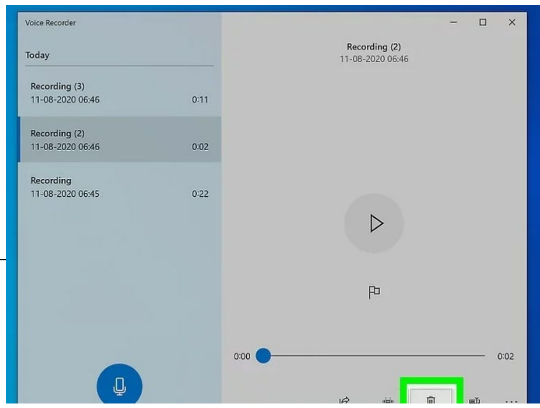
   The time taken to capture consent at the start of the recording does not count towards the recording time limit. Include this recording as part of your assessment submission.

   After you have recorded your questions, rename the file using the naming convention below and upload it to the LMS for marking:

   - BSBTEC402_02_Voice Recording_Student Name

   Below are instructions on how to create a voice recording on a PC or laptop device.

| | |
|---|---|
| **Open Voice Recorder.** Voice Recorder is a simple audio recording app that comes with Windows 10. You will find it in the Start menu or by typing '*voice recorder*' into the Windows search bar. |   |
| Click the microphone to start recording.<br><br>It's the large round button at the bottom of the left panel.<br><br>Pressing Control + R on the keyboard will also start recording. |   |

| | |
|---|---|
| | |
| Say whatever you want to be recorded. As you're recording, the time elapsed appears at the top of the window.<br><br>To pause the recording temporarily, click the pause button (two vertical lines). You can pause and un-pause as many times as you'd like to continue recording on the same file.<br><br>To mark a certain place in the recording with a flag so you can easily find it later, click the flag icon. |  |
| Click the stop button when you're finished. It's the large circle with a square inside.<br><br>The recorded audio is saved to a folder in your Documents directory called Sound recordings. |  |
| Click the play button to listen. It's the large circle containing a triangle at the centre of the right panel. The sound will play back through your default speakers or headphones.<br><br>If you don't hear anything, make sure the volume is up on your computer and that any external speakers are powered on. |  |
| Manage your recordings. As you continue to record sounds in Voice Recorder, they'll all appear in the left panel. You can right-click any of these recordings to access other settings, such as the ability<br>to Share, Rename, Delete, or Open file location'. |  |

| | |
|---|---|
| It's a good idea to rename your files after recording them, so they don't have generic names. This makes it easier to find what you're looking for in the future. | |

## Assessment 2 Task 2 Assessor Guide

### Purpose of the Task

This task is designed to ensure students can demonstrate the ability to prepare and plan two complex spreadsheet documents. Students are provided with the opportunity to analyse spreadsheet specifications and requirements as well as use communications skills and plan spreadsheet design.

### Guidance to Assessors About this Task

This task must be undertaken before the student commences Assessment 3 Task 1, as the student will use all the information gathered during this assessment concerning spreadsheet specifications and requirements to develop the spreadsheets required in Assessment 3 Task 1.

The student is assuming the role of Robyn Willis (Accountant) CBSA. The student is provided with the following documents, which they are required to refer to assist them in completing the planning templates constantly:

| Document | Purpose |
|---|---|
| Budgeted Planning Project Financial Data | The purpose of this document is to provide students with all financial information, i.e., budgeted and actual revenue, expense and profit/loss data which the student must manually input into the spreadsheet. |
| Budgeted Planning Template | The purpose of these two template documents is to provide students with templates to plan and prepare the two complex spreadsheets effectively. Students must complete these templates and submit them for assessment. |
| Budgeted v Actual Planning Template | |
| Style Guide | The purpose of this document is to ensure that students plan and produce spreadsheets according to CBSA's requirements for style and design. This document is to ensure consistency in relation to spreadsheet design and development across the two documents |
| Data Management Policy | The purpose of this document is to provide the student with CBSA's requirements on naming folders and files and storing files and documents. Additional information is provided in a voice recording from May Lee. |
| Email Template | The purpose of this document is to provide the student with a template to email Gavin Stead the completed plans for the development of each spreadsheet document for him to review and a suggested time frame for completing the spreadsheets. |

The assessment commences with an email from Gavin Stead (Managing Director) CBSA to the student Robyn Willis (Accountant) in relation to the planning of two complex spreadsheet documents for the purpose of budgeting and variance analysis.

The student must apply planning processes to plan complex spreadsheets and produce plans with logical steps by emailing Gavin Stead and attaching two completed plans for the development of each spreadsheet document.

The student must demonstrate listening and questioning skills by saving the completed plans as per May Lee's voice message and recording a voice recording to May Lee, clarifying how the spreadsheet documents are to be saved and stored.

To successfully complete this task, students must undertake the following steps:

1. The student must carefully read the email from Gavin Stead and then download the following documents included as attachments to the email:

   - Budgeted Planning Project Financial Data
   - Budgeted Planning Template
   - Budgeted vs Actual Planning Template
   - Email Template
   - Data Management Policy

   These documents provide the student with the financial data and templates needed to plan the two complex spreadsheets.

   The two complex spreadsheet documents to be planned are as follows:

   - Budgeted: This spreadsheet must specify CBSA's projected budgeted revenue and expenditure across July, August and September.
   - Budgeted vs Actual: This spreadsheet must specify CBSA's budgeted revenue and expenses as compared to the actual revenue and expenditure across July, August and September.

2. The student must refer to CBSA's Style Guide to understand the style, headers, and colour scheme to be used when designing and later producing the two spreadsheet documents.

   The style guide specifies:

   - all Financial Totals are to be Bold
   - red font/ shading must be applied to any negative values
   - - sign must be applied to all negative values
   - all $ amounts must include $ symbol, use 1000 separator (,) and two (2) decimal places
   - Top and Double Bottom Border style must be used for all grand totals
   - the students can use CBSA's Style Guide in relation to colour themes or select a similar/ complementary colour of their personal choice.

3. Students are encouraged to refresh their learning in the LMS and do further research on:

   - advanced functions of spreadsheet software applications, for example, MS Excel's mathematical functions and formulas etc
   - charts and graph styles in Excel
   - spreadsheet design concerning presentation and readability of data/information, for example, MS Excel's conditional formatting etc.

   Students will be required to have a good understanding of the above topics to plan and develop the two complex spreadsheets. Therefore, students are encouraged to refresh their learning in the LMS and do further research to overcome any problems they may encounter while planning and developing the two (2) complex spreadsheets. Further research could include:

- using the help function in Excel
- viewing the 'Welcome to Excel - Take a tour'
- watching videos
- working through tutorials.

4. Students are encouraged to review the Data Management Policy to understand CBSA's naming convention and document storage guidelines and listen to a voice recording from May Lee, which clarifies how they should name the planning templates before sending them to Gavin Stead.

**Example**

| | Incorrect | Correct |
|---|---|---|
| File Name | ExcelPlanningTemplate20210919_V03 | Excel_Planning_Template_20210919_V03 |
| Explanation | This example shows how underscores and capitals have been used to add clarity; date and version number have been included. | |

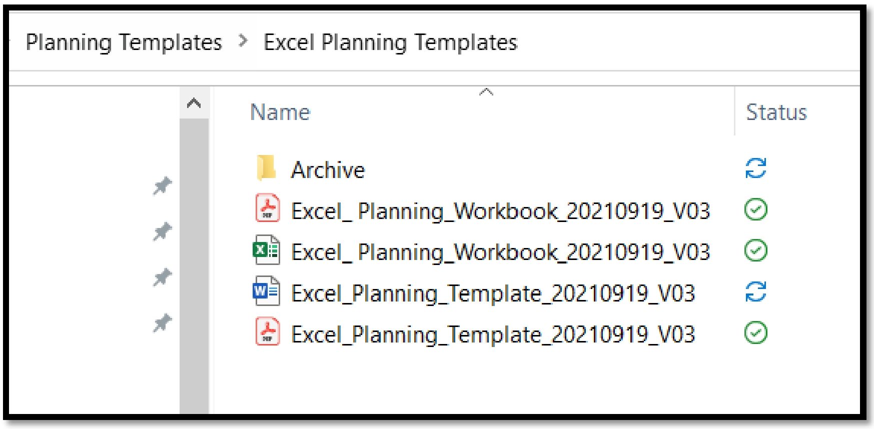
The Data Management Policy provides the following guidance on saving and storing documents:

*The final version of documents must be saved in word, excel etc. in addition to PDF to enable future edits to be made*

*Each document file has its own 'Archived Folder' where previous versions of documents can be stored for future reference.*

*Current and approved versions of documents are saved in the named folders.*

**Example**




The voice message from May Lee asks the student to name the two planning documents:

- Budgeted Planning Document
- Budgeted vs Actual Planning Document

### Voice message transcript

*Hi Robyn,*

*It's May Lee here. I hope your day is going well.*

*Thank you for the work you are doing helping us develop some complex spreadsheet templates. I really appreciate your input.*

*Further to Gavin Stead's email this morning, once you have finished populating the Budgeted Planning Template and the Budgeted v Actual Planning Template could you please create a new folder on your desktop named Budget Planning and save the documents as Budgeted Planning Document and Budgeted vs Actual Planning Document before you send them to Gavin.*

*Once again, thanks for the work you are doing and please let me know if you have any questions.*

*Enjoy the rest of your day and bye for now.*

5. The student must create a plan for each of the two spreadsheet documents using the following templates.

   - Budgeted Planning Template
   - Budgeted vs Actual Planning Template

Benchmark responses to each of the planning topics and key questions have been provided for both documents in the templates below the additional information.

### Additional Information

The following additional information is provided to the student and needs to be considered when planning the design of the spreadsheets.

#### Specific information in relation to the Budgeted spreadsheet

- The spreadsheet is needed as it will provide a model as to how the business might perform in relation to income and expenditure. It attempts to predict income and expense and, therefore, profitability.
- There will be multiple users. For example, the finance team will use the budget to control income and expenditure. Management will use the budget to provide direction and coordination so that key business objectives can be met. Other department managers will be assigned budgeting responsibilities, and resources will be allocated to each team based on these figures. Therefore, all figures must be accurate and legible.
- The student is asked to use the following formals to calculate Gross Profit and Net Position for the purpose of these spreadsheet documents:
  - Revenue less Cost of Goods Sold (COGS) equals Gross Profit.
  - Gross Profit less other expenses plus other revenue equals Net Position.

#### Specific information in relation to Budgeted vs Actual spreadsheet

- The spreadsheet will be used for variance analysis. A budget variance is a difference between the budgeted amount of the expense or revenue and the actual amount. The budget variance is considered favourable when the actual revenue is higher than the budget or when the actual expense is less than the budget.
- The spreadsheet requires graphs. The student must create the following three graphs:
  - Graph showing budgeted (target) versus actual revenue for July, August and September
  - Graph showing budgeted (target) versus actual expense for July, August and September
  - Graph showing budgeted (target) versus actual profit for July, August and September.

- There will be multiple users. Finance will use variance analysis to help maintain control over expenses by monitoring planned costs versus actual costs. Senior management will use variance analysis to spot trends, issues and opportunities as well as threats.

**Additional information in relation to document design**

- In relation to data entry, all data must be entered manually. Therefore, the student must access Excel and create a new workbook/spreadsheet. The student must ensure all data entered is clear and accurate.
- The student must create a linked solution. The spreadsheets and graphs can be created in a single Excel workbook.
- The student must give the spreadsheet a title, version number and save it electronically onto their desktop as outlined in CBSA's Data Management Policy and instructed in the voice message from May Lee.
- Once the spreadsheet planning documents have been developed, a copy of the completed templates must be provided to Gavin Stead.
- The two spreadsheet documents are to be developed within a two-week timeframe.
- The student must ensure there is space for output. The spreadsheets must be easy to read and presented on one page/worksheet. All data must be presented in a logical and meaningful way. For example:
    - All revenue items and totals
    - Cost of Goods Sold (COGS)
    - All expense items and totals
    - Net position.
- The student must follow CBSA's Style Guide when planning the spreadsheets.
- In relation to the colour scheme, the student can use the colour palette as indicated in CBSA's Style Guide, or they may choose to select similar/complementary colours. However, they must make sure they are consistent in the application of colour.
- The student must link the spreadsheets. For example, link Budgeted V Actual to Budgeted figures.
- In relation to cell format and attributes, the student must ensure:
    - that the figures are expressed in currency terms by adding the dollar ($) symbol to these cells
    - they 'Wrap Text' headings as needed
    - they align all headings in the same consistent manner
    - they align figures in a consistent and meaningful way that is easy to read.
    - the spreadsheet is flexible so that it can be modified in the future, i.e., the addition of data, changes of formula and future automation (macro).

The purpose of the two template documents is to provide students with templates to plan and prepare the two complex spreadsheets effectively. Students must complete these templates and submit them in an email to Gavin Stead.

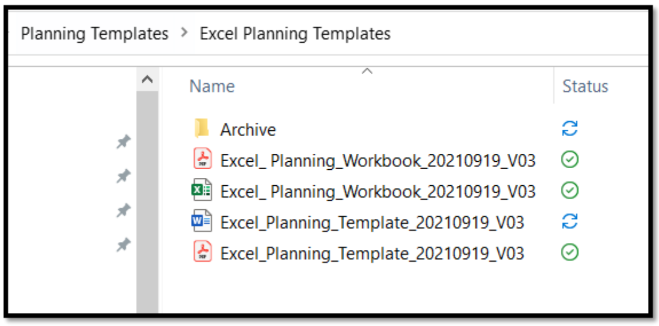
Benchmark responses to each of the planning topics and key questions have been provided for both documents below.

**Budgeted Template – Assessor Guide**

| |
|---|
| **Instructions**<br>To complete this template, you will need to:<br>▪ refer to the following: |

- Specific information in relation to the Budgeted spreadsheet
    - CBSA Style Guide
    - The Data Management Policy
    - Budgeted Planning Project Financial Data
    - Email from Gavin Stead
    - Voice Message from May Lee
- have a good understanding of:
    - advanced functions of spreadsheet software applications, for example, MS Excel's mathematical functions and formulas etc
    - charts and graph styles in Excel
    - spreadsheet design concerning presentation and readability of data/information, for example, MS Excel's conditional formatting etc.

| CBSA BUDGETED SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions.** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| Task purpose:<br>Why is the spreadsheet needed?<br>[Response length approximately 30 words] | The spreadsheet is needed to provide a model as to how the business might perform concerning income and expenditure. It attempts to forecast income and expense and, therefore, profitability. |
| Audience:<br>Who will be using the spreadsheet?<br>[Response length approximately 60 words] | There be multiple users. The finance team will use the budget to control income and expenditure. Management will use the budget to provide direction and coordination so that key business objectives can be met. Other department managers will be assigned budgeting responsibilities, and resources will be allocated to each team based on these figures. All figures must be accurate. |
| Data entry:<br>What data needs to be entered into the spreadsheet?<br>[Response length approximately 35 words] | I will need to start with a new/ blank MS Excel Workbook. At this stage, there is no data available in spreadsheet format to import; therefore, I must manually type in all data. |
| Storage:<br>How will the spreadsheet documents be saved?<br>What is the organisational policy and procedure in relation to storage?<br>[Response length approximately 220 words] | Spreadsheet documents will be saved electronically. May Lee has requested that I save the documents to a PC or laptop while I am working on them. She has asked that you save the documents using the file naming conventions, store the documents as per the Data Management Policy and email these documents to Gavin Stead once complete.<br>The Data Management Policy provides an example of how to name the file.<br>Excel_Planning_Template_20210919_V03<br>The following guidance is also provided: |

| CBSA BUDGETED SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions.** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| | ▪ Use capital letters and underscores (_) to clarify the file name<br>▪ The version number of a record should be indicated in its file name by the inclusion of '_V' followed by the version number (e.g., Version 1 = _V01, Version 2 = _V02 etc.)<br>▪ Dates should always be included in the file name<br>▪ Dates should follow the same format: YYYYMMDD, e.g., 20210425<br>The Data Management Policy also has an example of how to store the file.<br><br><br>The following guidance is also provided:<br>▪ The final version of documents must be saved in word, excel etc. in addition to PDF to enable future edits to be made<br>▪ Each document file has its own 'Archived Folder' where previous versions of documents can be stored for future reference.<br>▪ Current and approved versions of documents are saved in the named folders. |
| Output required:<br>Make a simple sketch to indicate the type of output required.<br><br>(Response length approximately 55 words) | There must be space planned in the spreadsheet for output. The spreadsheet must be able to be easily read and must fit neatly onto one page. The results must be displayed in a meaningful and logical way. For example, all revenue items, followed by expense items and then net position (profit or loss) calculated. |

| CBSA BUDGETED SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions.** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| Reporting and organisational requirements:<br>How can I make sure that the spreadsheet can be modified easily?<br>What key points from CBSA's Style Guide must be followed?<br>(Response length approximately 140 words) | I must ensure that the spreadsheet can be reused and/or easily modified to produce reports as required by the finance team and management. I must ensure that I follow CBSA's Style Guide in relation to the style of font, headers, font size etc. This also includes the following key points:<br>▪ All Financial Totals are to be Bold.<br>▪ Red font/ shading must be applied to any Negative Values.<br>▪ - sign must be applied to all Negative Values<br>▪ All $ amounts must include $ symbol, use 1000 separator (,) and two (2) decimal places<br>▪ Top and Double Bottom Border style must be used for all Grand Totals.<br>▪ All Content is to be left-aligned in each cell except for:<br>o title headings which can be centred and bolded<br>o numbers which are to be right aligned |
| Presentation:<br>How can the data be presented in a meaningful way?<br>How can I make the data clear and legible? Easy to read etc.?<br>How will I arrange the data logically?<br>(Response length approximately 165 words) | I will use a standard design of columns and rows to express all data. I will ensure that I consider the following design aspects when creating the spreadsheet:<br>▪ Clear style as per CBSA's Style Guide to present data<br>▪ Use of fonts as per CBSA's Style guide<br>▪ Use of a clear hierarchy of font sizes as per CBSA's Style Guide. This improves readability and graphics consistency<br>▪ I will use white space to improve readability<br>▪ I will carefully consider a colour palette, for example, one or two colours that work well together. I will select a colour scheme consistent with CBSA's Style Guide or closely related/ complementary as per May Lee's suggestion.<br>▪ I will shade alternate rows to improve readability, for example, using a light grey<br>▪ I will use grid lines sparingly and will not place too much emphasis on the individual cell<br>▪ I will arrange the data logically, i.e., all revenue items, followed by expense items and then profit or loss calculated |

| CBSA BUDGETED SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions.** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| Linked spreadsheet needs:<br>Are multiple worksheets needed?<br>Is there a need to link the spreadsheets?<br>(Response length approximately 30 words) | This spreadsheet will provide source data to the second spreadsheet I will be creating titled Budget Vs Actual. Therefore, at least two worksheets will be created, and they will be linked. |
| Cell formats and data attributes assigned to cells:<br>Is there a need to change the standard cell format and attributes?<br>(Response length approximately 60 words) | I will need to change the standard cell format into the current format to represent dollar value figures for all revenue and expense items and all totals.<br>I must select a suitable cell width to clearly show the figures in each cell and assist with legibility.<br>I will Wrap Text as needed to wrap data or headers around the cell. |
| Advanced software functions and formula:<br>Use a pen and paper to make a sketch to determine what data is consistent and static compared to the data that will be changing.<br>What types of formulas are needed, and what formatting features will I use?<br>(Response length approximately 90 words) | The static data includes all the figures presented, which I must manually input – for example, income and expense items for July, August and September.<br>The changing data includes all totals. I will use an addition formula to generate all totals, i.e. AutoSum. I will also use a subtraction formula to find out the difference between the total revenue and total expenses, as Revenue less Expense equals Profit or Loss (Net Position). I will ensure the accuracy of these formulas by manually testing them with a calculator. |

## Budgeted vs Actual Template – Assessor Guide

**Instructions**

To complete this template, you will need to:

- refer to the following:
  - Specific information in relation to the Budgeted spreadsheet
  - CBSA Style Guide
  - The Data Management Policy
  - Budgeted Planning Project Financial Data
  - Email from Gavin Stead

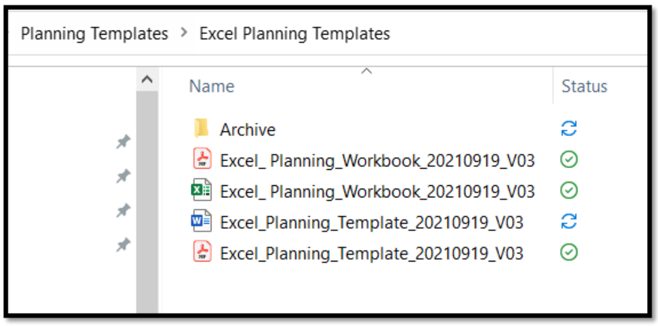
- Voice Message from May Lee

have a good understanding of:

- advanced functions of spreadsheet software applications, for example, MS Excel's mathematical functions and formulas etc
- charts and graph styles in Excel

spreadsheet design concerning presentation and readability of data/information, for example, MS Excel's conditional formatting etc.

| CBSA BUDGETED VS ACTUAL SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| Task purpose:<br>Why is the spreadsheet needed?<br>[Response length approximately 55 words] | The spreadsheet will be used for the purpose of variance analysis. A budget variance is a difference between the budgeted amount of the expense or revenue and the actual amount. The budget variance is considered favourable when the actual revenue is higher than the budget or when the actual expense is less than the budget. |
| Audience:<br>Who will be using the spreadsheet?<br>[Response length approximately 35 words] | There be multiple users. Finance will use variance analysis to help maintain control over expenses by monitoring planned costs versus actual costs. Senior management will use variance analysis to spot trends, issues, opportunities, and threats. |
| Data entry:<br>What data needs to be entered into the spreadsheet?<br>[Response length approximately 55 words] | I will need to start with a new/ blank MS Excel Workbook. At this stage, there is no data available in spreadsheet format to import; therefore, I must manually type in all data. However, I will be able to link this spreadsheet to spreadsheet one (1) budgeted revenue and expense items and totals etc. |
| Storage:<br>How will the spreadsheet documents be saved?<br>What is the organisational policy and procedure concerning storage?<br>[Response length approximately 220 words] | Spreadsheet documents will be saved electronically. May Lee has requested that I save the documents to a PC or laptop while I am working on them. She has asked that you save the documents using the file naming conventions, store the documents as per the Data Management Policy and email these documents to Gavin Stead once complete.<br>The Data Management Policy provides an example of how to name the file.<br>Excel_Planning_Template_20210919_V03<br>The following guidance is also provided:<br>▪ Use capital letters and underscores (_) to clarify the file name. |

| CBSA BUDGETED vs ACTUAL SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| | ▪ The version number of a record should be indicated in its file name by the inclusion of '_V' followed by the version number (e.g., Version 1 = _V01, Version 2 = _V02 etc.).<br>▪ Dates should always be included in the file name.<br>▪ Dates should follow the same format: YYYYMMDD, e.g., 20210425.<br>The Data Management Policy also has an example of how to store the file.<br><br>The following guidance is also provided:<br>▪ The final version of documents must be saved in word, excel etc. in addition to PDF to enable future edits to be made<br>▪ Each document file has its own 'Archived Folder' where previous versions of documents can be stored for future reference.<br>Current and approved versions of documents are saved in the named folders. |
| Output required:<br>Make a simple sketch to indicate the type of output required.<br>(Response length approximately 90 words) | There must be space planned in the spreadsheet for output. The spreadsheet must be able to be easily read and must fit neatly onto one page. The results must be displayed in a meaningful and logical way. For example, all revenue items, followed by expense items and then profit or loss calculated.<br>This spreadsheet requires graphs to chart variances, for example, in MS Excel that plot actual and budgeted figures. Bar charts can be used for this proposal, and I will use these charts to communicate variance analysis information. |
| Reporting and organisational requirements:<br>How can I make sure that the spreadsheet can be modified easily?<br>What must key points from CBSA's Style Guide be followed? | I must ensure that the spreadsheet can be reused and/or easily modified to produce reports as required by the finance team and management. I must ensure that I follow CBSA's Style Guide in relation to the style of font, headers, font size etc. This also includes the following key points:<br>▪ All Financial Totals are to be Bold.<br>▪ Red font/ shading must be applied to any Negative Values. |

| CBSA BUDGETED VS ACTUAL SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| (Response length approximately 130 words) | ▪ - sign must be applied to all Negative Values<br>▪ All $ amounts must include $ symbol, use 1000 separator (,) and two (2) decimal places<br>▪ Top and Double Bottom Border style must be used for all Grand Totals.<br>▪ All Content is to be left-aligned in each cell except for:<br>o title headings which can be centred and bolded<br>o numbers which are to be right aligned |
| Presentation:<br>How can the data be presented in a meaningful way?<br>How can I make the data clear and legible? Easy to read etc.?<br>How will I arrange the data logically?<br>(Response length approximately 320 words) | I will use a standard design of columns and rows to express all data. I will ensure that I consider the following design aspects when creating the spreadsheet:<br>▪ Clear style as per CBSA's Style Guide to present data<br>▪ Use of fonts as per CBSA's Style guide<br>▪ Use of a clear hierarchy of font sizes as per CBSA's Style Guide. This improves readability and graphics consistency<br>▪ I will use white space to improve readability<br>▪ I will carefully consider a colour palette, for example, one or two colours that work well together. I will select a colour scheme consistent with CBSA's Style Guide or closely related/ complementary as per May Lee's suggestion.<br>▪ I will shade alternate rows to improve readability, for example, using a light grey<br>▪ I will use grid lines sparingly and will not place too much emphasis on the individual cell<br>▪ I will arrange the data logically, i.e., all revenue items, followed by expense items and then profit or loss calculated<br><br>This spreadsheet requires graphs/charts about variance/ difference between the budgeted and actual revenue and expense items. I am required to create the following three graphs:<br>1. Graph showing budgeted (target) versus actual revenue for the months of July, August and September.<br>2. Graph showing budgeted (target) versus actual expense for the months of July, August and September.<br>3. Graph showing budgeted (target) versus actual profit for the months of July, August and September. |

| CBSA BUDGETED VS ACTUAL SPREADSHEET<br>ASSESSOR GUIDE | |
|---|---|
| **Planning Topics and Key Questions** | **Planning and responses**<br>*Use the space provided below to write your plan by responding to each of the questions.* |
| | I will consider the following elements when producing the three graphs:<br>▪ Ensure graphs have clear labels and titles.<br>▪ Remove any unnecessary axes and redundant labels to ensure clarity and improve readability.<br>▪ Make sure that bars are distributed evenly, for example, the bars will be winder and the distance between the bars narrower. This will improve readability.<br>▪ Remove gridlines/ background lines as these can be a distraction to the user.<br>Use the same colour theme or similar to that of CBSA's Style Guide to ensure consistency. |
| Linked spreadsheet needs:<br>Are multiple worksheets needed?<br>Is there a need to link the spreadsheets?<br>(Response length approximately 35 words) | This spreadsheet must be linked to spreadsheet one (1) Budgeted as all budgeted figures can be linked across the two sheets. Therefore, there will be at least two worksheets created, and they will be linked. |
| Cell formats and data attributes assigned to cells:<br>Is there a need to change the standard cell format and attributes?<br>(Response length approximately 60 words) | I will need to change the standard cell format into currency format to represent dollar value figures for all revenue and expense items and all totals.<br>I must select a suitable cell width to clearly show the figures in each cell and assist with legibility.<br>I will Wrap Text as needed to wrap data or headers around the cell. |
| Advanced software functions and formulas:<br>Use a pen and paper to make a sketch to determine what data is consistent and static compared to the data that will be changing.<br>What types of formulas are needed, and what formatting features will I use?<br>(Response length approximately 105 words) | The static data includes all the figures presented, which I must manually input – for example, income and expense items for July, August and September.<br>The changing data includes all totals. I will use a formula of addition to generate all totals, i.e., AutoSum. I will also use a formula of subtraction to find out the difference between the total revenue and total expenses, as Revenue less Expense equals Profit or Loss. I will ensure the accuracy of these formulas by manually testing them with the use of a calculator.<br>I will use graph/ chart functions to create the three bar charts as needed. |

Once the two plans have been developed, they must be submitted to Gavin Stead via email using the email template provided. Please refer to point six (6) below in relation to email submission requirements.

6. The student must compose an email to Gavin Stead – Managing Director CBSA. The email must include:

A brief description summarising the purpose of the email, for example, "I am writing to inform you that I have now effectively planned for the development of each spreadsheet document. I have attached the two plans as developed for your perusal".

Two plans (templates) completed:

1. Budgeted Planning Template
2. Budgeted v Actual Planning Template

The two plans must be attached to the email.

Timeframe by which all documents must be provided as provided in the additional information, for example, "I understand that you would like the two spreadsheet documents to be developed within a two-week time frame".

The student's name and position title: For example, Robyn Willis (Accountant) CBSA.

The student must upload the email and attached documents to the LMS for assessment.

7. The student must consider two questions they could ask May Lee – Finance Manager CBSA to clarify how they should save and store the two (2) complex spreadsheet documents once they have been developed. (Assessment 3 Task 1). For Example:

- What is the name of the folder that you want me to save the spreadsheet documents in?
- Do you want me to archive draft versions of the spreadsheets?
- How do you want me to name the spreadsheet documents?
- What filename do you want me to use for the spreadsheet documents I am creating?

They then need to create a voice recording asking the two questions they have developed. The voice recording must be no longer than 5 minutes in length.

The student has been provided instructions on how to create a voice recording on a PC or laptop device.

Consent to participate in the recording must be captured at the start of the voice recording. This is achieved by the student reading the following statement at the start of the recording.

"This recording is for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. I indicate consent to be recorded by stating my name and student number."

The recording must be no longer than **5 minutes in length**. The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Use the following Observation Checklist to record your observations while you listen to the voice recording. Where all criteria are demonstrated, write a general comment in the Student Assessment Feedback Form. Where one or more criteria are not demonstrated to a satisfactory standard, make a specific comment for each criterion requiring re-submission, including constructive feedback in the Student Assessment Feedback Form.

| **Voice Recording Observation Checklist**<br>*[to be completed by the Assessor]* | |
|---|---|
| Use this checklist while reviewing the recorded role play: | |
| Did the student: | **Satisfactory/**<br>**Not Yet Satisfactory** |
| Demonstrate questioning skills to clarify requirements | ☐Satisfactory<br>☐Not Yet Satisfactory |
| Identify the requirements of data storage | ☐Satisfactory<br>☐Not Yet Satisfactory |
| Assessor Name:<br>Date: | |

After the student has recorded their questions, they must rename the voice recording file using the naming convention below and upload it to the LMS for assessment.

- BSBTEC402_02_Project_Voice Recording Student Name

**Assessment checklist:**

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

| | | |
|---|---|---|
| Task 1 | Design an infographic poster (following steps 1-5) | ☐ |
| Task 2 | • Complete the *Budgeted Planning Template* (following steps 1-5)<br>• Complete the *Budgeted vs Actual Planning Template* (following steps 1-5)<br>• Write an email to Gavin Stead (following step 6)<br>• Record voice message (following step 7) | ☐<br>☐<br>☐<br>☐ |

Congratulations, you have reached the end of Assessment 2!