

Work Smarter With Microsoft Excel

Assignment Title: Analyse and present data with Excel

Instructions:

All Sales sheet

The workbook currently has a single worksheet. Rename this sheet to All Sales. Sort the data to organize it initially by Month and then by Sales Area. Use commands in the Font, Number and Cell Styles to make all content and headings to match the sample. Widen columns were necessary. Add in the Targets and Commission columns. In Targets, enter one value of 15000. Use Fill Down to repeat for all cells under the Targets heading. Enter a value of 10% in a cell and assign the name commission to that cell. In the first cell under the heading Commission, create an IF formula that checks if the sales amount on that row is greater than or equal to the target. If it is, the IF formula should calculate the commission due using the named cell. If the target is not met, the IF formula should return the value zero.

North, South, East, and West sheets

Add in four new sheets. Rename them North, South, East, and West. In the All Sales sheet, use Filters to identify entries for each region. Use copy and paste to add the data into the new sheet of the same name. In each of the area sheets, create blank rows and add the headings. Format each heading as per the sample. Add a Conditional Format rule to the Sales Amount column in each area sheet which highlights the top 5 values in colour. In each sheet, add the salespeople's names as headings at the top right. For the first salesperson in each sheet, use SUMIF to calculate their sales total. Use dollar signs in the formula so that you can copy the formula to the right.

Copy of All Sales sheet

Copy the All Sales sheet. Rename it Copy of All Sales. Clear all formatting from the titles. Make the data into a table with the Total Row feature turned on. Add totals in the Sales Amount and Commission columns. Name the table Sales_Data and format it with the style feature. Add the Over/Under column. Create a formula using table references to calculate this. Change the formatting so that the results are displayed as currency, with negative values in red.

Chart sheet

Add a sheet called Chart. Create a summary block of data which contains the area totals for sales and commission. Use the Total Row of the Table to generate the totals but ensure that the values in the Chart sheet are constant and will not change. Create a Column Chart from the block of data. Once the chart has been created. Change the Title text and the appearance of the Chart as per the sample. Change only the Commission data series to a green colour. Add a border and bevelled effect around the edges. Add an Alt+Text description to the chart.

Sales Analysis sheet

Position the cursor in the Sales_Data Table and insert a Pivot Table in a new worksheet. Rename that worksheet Sales Analysis. Design a PivotTable that show the sales totals broken down by month and formatted as currency. Have a second set of totals visible as a percentage of the grand total. Set up the PivotTable so that the whole table can be filtered by payment type. (Tip: if you add the heading month to the appropriate box in the PivotTable pane, it will probably be visible as two entries. You can remove one to leave just a list of unique month names.) Change the style of the PivotTable and reword the headings to match the sample. Add the Sales Area and Employee slicers to the sheet. Format them so that they stand out.

New Staff sheet

Use options in the Data Ribbon to import data from the New Staff CSV file. Load the data. Break the link to the original file. Delete any connections and close any query windows. Add in blank columns and by using text function formulas or Flash Fill (as appropriate) fill them with the staff names transformed to match the sample. In one column use a text function to extract the area initials from the column called Payroll ID. Hide columns except for First Name, Last Name and Area Code.

Cover Page sheet

Create a new worksheet called Cover sheet. Organize the sheets in the workbook so that they match the order in the sample. (Left to right they should be: Cover Sheet, All Sales, North, South, East, West, Copy of All Sales, Chart, Sales Analysis, and New Staff.) On the Cover Page sheet, add the heading and the sheet name headings. Add a background using the Background.png file. Add hyperlinks to the sheet headings to facilitate clicking on the heading to navigate to that sheet. Add Alt+Text to the hyperlinks to show the sheet name and not the full path. Add a colour to the Cover Page, All Sales, and Sales Analysis tabs to make them stand out. Save and close the file.