

Task 1 -For the DeptYearlyPerf.xls, Create a table that presents its information as clearly and informatively as possible.

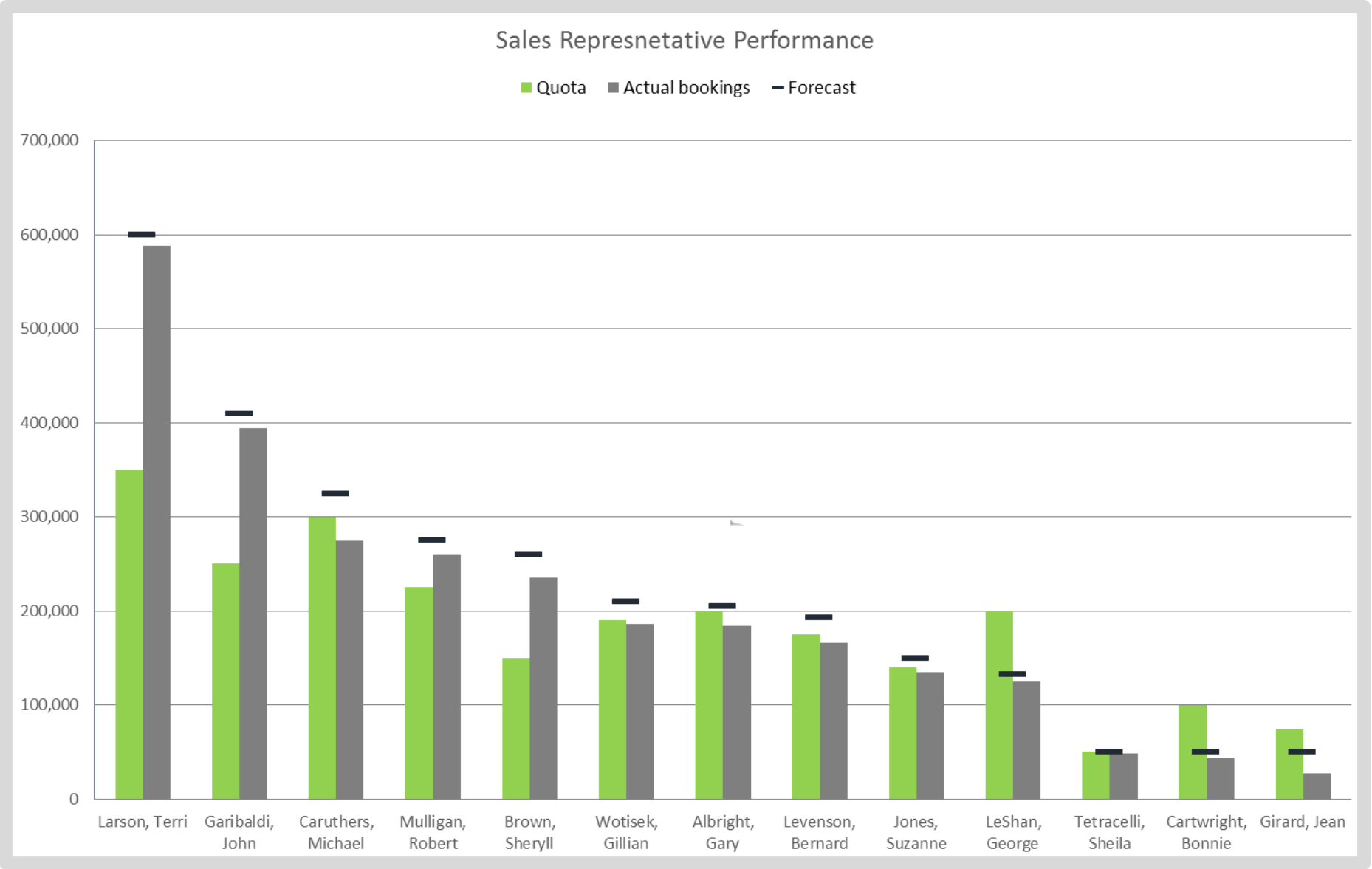
Time	Statement	Distribution	Facilities	Human Resources	Information Systems	All Departments
Q1	Budget	390,000	675,000	350,000	950,000	2,365,000
Q1	Actual	375,000	693,000	346,000	925,000	2,339,000
Q1	%_Variance	▲96.15	▼102.67	▲98.86	▲97.37	▲98.90
Q2	Budget	395,000	800,000	350,000	850,000	2,395,000
Q2	Actual	382,000	837,000	342,000	890,000	2,451,000
Q2	%_Variance	▲96.71	▼104.63	▲97.71	▼104.71	▼102.34
Q3	Budget	400,000	750,000	350,000	875,000	2,375,000
Q3	Actual	390,000	713,000	340,000	976,000	2,419,000
Q3	%_Variance	▲97.50	▲95.07	▲97.14	▼111.54	▼101.85
Q4	Budget	410,000	750,000	350,000	900,000	2,410,000
Q4	Actual	408,000	790,000	367,000	930,000	2,495,000
Q4	%_Variance	▲99.51	▼105.33	▼104.86	▼103.33	▼103.53
TotalYear	Budget	1,595,000	2,975,000	1,400,000	3,575,000	9,545,000
Total Year	Actual	1,555,000	3,033,000	1,395,000	3,721,000	9,704,000
TotalYear	Variance	40,000	-58,000	5,000	-146,000	-159,000
TotalYear	%_Variance	▲97.49	▼101.95	▲99.64	▼104.08	▼101.67

▼	Actual Budget is greater than the budget allocated
▲	Actual Budget is within the budget allocated
	Budget Exceeded/Year
	Budget Saved/Year

The purpose of this table is to display a summary of sales of each department over a year. I have used Excel 2016 to create a table. I transposed the given table to give a summary of sales of each department quarter-wise and year-wise. I used ‘Format as Table’ option in Excel to choose the table-style. I summarized the sales data for all departments in each quarter by adding a column ‘All Departments’. I have also added eight rows that summarize the given data for total year. The rows, Q1 %_Variance, Q2 %_Variance, Q3 %_Variance, Q4 %_Variance, Total Year %_Variance give the percentage of variance of Actual from Budget. I used colors to represent the performance and mentioned the same using legend. The icons added using icon-set rules in the ‘Conditional Formatting’ option that marks the cell with red downward arrow when Actual exceeds the Budget (%_Variance>100%) and green upward arrow if Actual falls within the Budget(%_Variance<100). I have also calculated the Total Year Budget, Total Year Actual and Total Year Variance for all the columns using the Excel formulas to express the yearly performance. The Total Year Variance is represented with red cells if the Actual exceeds Budget and green otherwise.

Task 2 - For the SaleRepPerf.xls, design a graph that presents its information as clearly and informatively as possible

2



The purpose of this graph is to compare the performances of salesmen in a firm. I have assumed that the sales person’s actual, quota and forecast bookings are the most important characteristics of the given table and they convey more information. Initially, I sort the entire dataset on actual bookings in Excel 2016. I used a combo char in Excel to represent the entire dataset. I built a column graph using Excel charts, with two columns for each salesman representing their quota and actual bookings. I assumed the forecast represents the expected bookings of a salesperson. I represented the forecast bookings using a scatter plot of black dashes that helps us compare the actual and quota bookings of a salesperson to his respective forecast. And, I used pastel colors for the columns to represent the information clearly without much contrast and confusion. The Y-axis represents the bookings in the intervals of 100000 and X-axis represents each sales person’s name. The legend gives information of the characteristic representations. I used grid lines to help us compare the values if needed.