

Purpose:

This assessment task allows you to develop practical skills in data analysis and visualisation using a software package commonly used in Accounting practice.

Weighting:

Total 20%

Consisting of:

- Dashboard: 17%
 - Reflection 3%.
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Instructions:

1. Please download the Assessment data file (Assessment 1 Excel file 2021) from Blackboard.
 2. To complete this assessment, you will need access to a copy of Microsoft Excel, which, as an enrolled student, you can obtain for free from the University.
 3. Complete the requirements as listed below and submit your completed worksheet to Blackboard by the due date.
 4. Complete the reflection task and submit it in the folder provided on Blackboard by the due date.
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The Scenario:

You have recently transferred into the role of Senior data analyst in SuperStore Ltd. You are stationed at their head office in Sydney. SuperStore has and continues to sell office equipment at discount prices online since 2015. SuperStore offers their products exclusively online and has no shopfronts which allows for it to save on selling costs to gain a competitive advantage. Angelo is the head of sales and is interested in understanding the sales data for the products that SuperStore offers. Angelo hopes to understand what customers like to purchase, as well as which products are most profitable to SuperStore, so that he can make decisions about stock volume levels, purchase discounts and marketing campaigns.

While this would have otherwise been a job for your boss, you have indicated during a previous supervision session that you are keen to take on higher responsibilities, in a bid to pave way for a promotion. As your boss is traveling abroad, he thought it an opportune time for you to complete the requested task with the assistance of the office clerk (this role in the current scenario will be played by your course lecturer).

You have managed to extract the sales data from the company's accounting information system and have put these in an excel file (Assignment 1 Excel file 2021.xlsx). You decide that using Excel is the best way for you to present the data. You are confident that the use of an Excel table will allow you to provide an appropriate interactive dashboard, various pivot tables, charts, filters and slicers when presenting your information to Angelo.

Requirements:

1. Using the dataset provided and **at least** 3 charts, 3 pivot tables, one filter and 4 slicers, create a one page DASHBOARD that summarises the sale of products year on year for Angelo. **This submission (dashboard + 1 page summary) makes up 17 of your 20 marks for Assessment 1.**
 2. You will need to convert the dataset to an Excel table and then do some work on it for the analysis:
 - a. Format all the rows in your table to a height of 13.2.
 - b. Add a column that contains the year extracted from the "Date".
 - c. Add a column that contains the month number extracted from "Date".
 - d. Add a column that contains the month formatted in words e.g. "Jan", "Feb" etc.
 3. Angelo has provided the following list of data which he is interested in viewing:
 - a. Information on the countries and regions which are most profitable and have the most sales activity;
 - b. An insight into SuperStores most popular products and those products which generate the most profit;
 - c. Identification of any products which may be poor performing or at risk of becoming obsolete;
 - d. Who SuperStores' best and worst customers are and an indication of which products they enjoy, including margins (this will help Angelo to decide what products to discount);
 - e. A monthly analysis of sales to help Angelo with stock and distribution staff levels. Angelo would really appreciate it if this can also show him which products are more popular at different times of the year;
 4. In addition to the above request, your discussions with Angelo highlighted that he would like to extend SuperStores' technology product offering. You decide to include an additional analysis regarding the technology category of products to help Angelo understand what customers and stores would be ideal for the new offerings.
 5. Angelo would like to see the data represented in a variety of charts and pivot tables. He would also like to be able to vary the data that is on these charts using filters and or slicers to make it as interactive as possible. In particular, he would like to be able to slice the data by **some** of the following categories, as appropriate for the pivot tables you have selected:
 - a. Year
 - b. Month
 - c. Country
 - d. State
 - e. Product Category
 - f. Sub Category
 6. Please make sure that your charts and other dashboard elements are appropriately labelled, i.e. with titles and chart labels.
 7. You need to submit the file containing your worksheet and dashboard to Blackboard for the head of sales (Angelo) to look at. Please use the **Excel Files – Assessment Task 1** folder on Blackboard and please make sure that your filename contains your last name and student number.
 8. You should also send Angelo a ONE PAGE summary of your work (maximum 1000 words +/- 10%). This should explain how to use your dashboard, **why** you have included the tables, charts, filters and slicers you have chosen, and highlight any specific choices you have made when categorising the above. Submit this to the folder supplied in Blackboard as well.
 9. You are required to also prepare a 500 word reflection on this task. You will find some resources for writing these in the Assessments folder. Please consider your position at the outset, during and at completion of the task, make reference to the course materials and other resources used along the way, and reflect on how this assessment task might impact your approach to data visualisation in the future. Submit this to the "Reflections: Assessment 1" folder on Blackboard. **This part of the assessment counts 3/20.**
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