**Excel Major Assignment**

**Background**

The Glen Morris Diabetes Association is in the process of preparing their organization’s proposed budget for the next fiscal year.

**Project Details**

For this major course assignment you have been provided with an Excel workbook that was created by someone with minimal knowledge of spreadsheet formulas.

Your job is to:

* Add appropriate formulas and formatting to the spreadsheet to make the budget process more efficient and effective.
* *Save your work often and back up your assignment to your G: drive, a memory stick and your home computer*. “The dog ate my homework” and “My computer stopped working” are NOT valid excuses and will NOT be accepted.
* Submit the assignment on or before the **Due Date** (End of Class in Week 14)

**NOTE: Marks, for the entire section, will be available in the eConestoga gradebook three to ten business days after the due date.**

**Specific Directions**

Using the tools, in Microsoft Excel, follow the instructions below to add the appropriate formulas to the spreadsheet.

1. Download the word document named, **Excel Assignment - Start File.docx**, from the eConestoga system to your “G” drive.
2. Rename this document, using the FILE tab, Save As icon to save it under a new name  
    E.g. **Excel Assignment - FFlintstone-Sec00.docx.**   
   Replace **FFlintstone** with your first initial and last name and **00** with your section number.
3. Create a documentation sheet to include the company logo, you as the author of the workbook, a date using a date function and then reformat it to the long date, and include a purpose for this workbook.
4. Back up all of your assignment files to a memory stick and/or your home computer.
5. Complete the following instructions for the worksheets of the Excel workbook.  
   NOTE: Each set of instructions is preceded by the **sheet tab name** to which they apply.
   1. **Promotional Sales**
      * 1. **In Cell D7, enter a formula that uses an absolute reference to the “Profit as Percentage of Sale Price” cell, the sale price for the item and estimate of the number of items that will be sold to calculate the estimated profit for “Tee Shirts”.**
        2. **Copy the formula from cell D7 down to D18, to calculate the estimated profit for the other items being sold.**
        3. **In Cell C20, enter a formula to total the estimated number of items sold.**
        4. **In cell D20, enter a formula to total the estimated profits, format all totals.**
        5. **Save your work now! Consider creating a copy on your memory stick.**
   2. **Silent Auction**
      * 1. In cell C22, enter a formula to calculate the total of the Item Values in column J.
        2. In cells H22 & L22, use a formula to automatically display the total that is in C22.(Referencing)
        3. In cell C23, enter a formula to calculate the total number of people attending the event from column L.
        4. In cells H23 & L23, use a formula to automatically display the total that is in C23.(Referencing)
        5. In cell C24, enter a formula to calculate the Estimated Ticket Sales based on the estimated total attending and the ticket price in cell C25.
        6. In cell H24, enter a similar formula that uses the ticket price in cell H25.
        7. In cell L24, enter a similar formula that uses the ticket price in cell L25.
        8. Format appropriately wherever necessary for clarity and understanding.
        9. Save your work now! Consider creating a copy on your memory stick.
   3. **OutReach Initiative**
      * 1. In the Budget Estimate Working Sheet Template (starts in Row 17), there are 7 cells with an yellow background (E17, E18, E19, E21, H23, F25, E27)  
           Determine appropriate formulas for these cells that will calculate the various Total Expense values.
        2. In cell B8, enter a formula to display the previously calculated Total Expense for Salaries and Benefits SUB TOTAL from the Working sheet.
        3. In cell B9, enter a formula to display the previously calculated Total Expense for Program Costs SUB TOTAL from the Working sheet.
        4. In cell B10, enter a formula to display the previously calculated Total Expense for Administration SUB TOTAL from the Working sheet.
        5. In cell B11, enter a formula to display the previously calculated Total Expense for  
           Capital Costs SUB TOTAL from the Working sheet.
        6. In cell B12, enter a formula to display the previously calculated Total Expense for Miscellaneous Costs SUB TOTAL from the Working sheet.
        7. In Row 13 columns C through G, enter formulas to add up the column data.
        8. In Column H row 8 through 12, enter formulas to add up the appropriate row data.
        9. Format appropriately.
        10. Save your work now! Consider creating a copy on your memory stick.
   4. **Legacy Fund**
6. **In cell B12, enter a formula to add up all the data in column B.**
7. **From the data, in cell range A7 to B10, create a 3D Pie Chart that communicates the distribution of the different revenue sources. Make sure that your chart displays the value, percentage and category name in each slice of the pie.**
8. **Add an appropriate title to the 3D Pie Chart.**
9. **Move the 3D Pie Chart to a new worksheet named Revenue Sources.**
10. **Move the Revenue Sources worksheet between the Legacy Fund and Eat Healthy for Life worksheets.**
11. **Format if necessary.**
12. **Save your work now! Consider creating a copy on your memory stick.**
    1. **Eat Healthy for Life**
13. **In cells E5:G11, insert an appropriate diabetes related image of your choosing from the internet. Make sure you have permission to use the image. (Copyrighted ?)**
14. **In cell B12, enter a formula to add up all the expenses.**
15. **In cell B21, enter a formula to add up all the revenues.**
16. **In cell B22, enter a formula to determine the potential Profit/Loss for the event.**
17. **From the data, in cell range A6 to B11, create a 2D Clustered Column Chart that communicates a comparison of the different expense types.**
18. **Create an appropriate title for the 2D Column Cluster Chart.**
19. **Create a new worksheet tab named Expense Types.**
20. **Move the 2D Column Cluster Chart to the Expense Types worksheet.**
21. **Move the Expense Types worksheet between the Eat Healthy for Life and Budget Summary worksheets.**
22. **Format when necessary.**
23. **Save your work now! Consider creating a copy on your memory stick.**
    1. **Budget Summary**
24. **Enter appropriate Consolidation Formulas that will retrieve the requested amounts from the other worksheets and display them in specified cells of this worksheet.**
    * + - 1. **In cell E6, display Total Estimated Profit from Promotional Sales.**
          2. **In cell E7, display Est. Ticket Sales from Silent Auction.**
          3. **In cell E8, display Total Requested Income of OTF from Outreach Initiative.**
          4. **In cell E9, display the sum of the totals of All Other Income Sources (Columns D to G) from Outreach Initiative.**
          5. **In cell E10, display Totals from Legacy Fund.**
          6. **In cell E11, display Total from Eat Healthy for Life.**
          7. **In cell E15, display Salaries and Benefits from Outreach Initiative.**
          8. **In cell E16, display Program Costs from Outreach Initiative.**
          9. **In cell E17, display Administration from Outreach Initiative.**
          10. **In cell E18, display Capital Costs from Outreach Initiative.**
          11. **In cell E19, display Miscellaneous Costs from Outreach Initiative.**
          12. **In cell E20, display Total from Eat Healthy for Life.**

**m. In cell E12, enter a formula to add up the Proposed Total Revenues.**

**n. In cell E21, enter a formula to add up the Proposed Total Expenses.**

**o. In cells C22, D22 and E22, enter formulas to calculate Surplus/Loss.**

**p. Format appropriately when necessary.**

**q. Save your work now! Consider creating a copy on your memory stick.**

1. Insert a Header and Footer.
   * 1. Ensure that the same Header & Footer appear on ALL of the worksheets in the workbook  
        except for the worksheets that contain charts.
     2. Add an appropriate assignment title, your name, the sheet tab name, the current date & time and Page X of Y at a location of your choosing in either the header or the footer.
2. Review all the worksheets for completeness and Proofread anything that you typed.
3. **Check to be sure you have retained all of the existing formatting in the modified cells.**
4. Upload your assignment file to the eConestoga Drop Box for the Excel assignment by the DEADLINE date or get zero for this assignment and possibly a failure for this course.