|  |  |
| --- | --- |
| **Memorandum** | E:\Users\bergg\Documents\My Templates\Word\Accountancy\Accountancy\Accountancy_color_h.png |

To: 4320 Students

From: Gary G. Berg

Date: May 20, 2025

Re: Assignment 8 – Excel Descriptive Stats

* This assignment is a modification of lab 5-1
* Required:
	+ Download the Excel file for this assignment.
	+ Complete Steps 1 & 2 on page 287-288 (**ignore steps 3 and 4** )
		- Note: the descriptive stats to be based on all financial fiscal year data and should include Total Assets, Net Income (Loss), and Sales (Net)
* Additional requirements
	+ Insert an additional column in you data source and use the **MID function** to populate the column with the **fiscal year month** of the data date. This is necessary since Excel will not breakdown the data date field in the pivot table.
	+ Create the following pivots tables (Name using pivot one, two, three, four)
		- **Pivot table one** showing Number of companies in each SIC Code, Total assets, Total sales(net) and Total net income(loss) by SIC code. (format 2 decimal places). Sort on SIC code in ascending order
		- **Pivot table two** showing all companies **(use company name)** in a particular SIC code group. (Showing total assets, total sales(net), total Net Income (Loss) **with ability to filter using slicers by fiscal year(s) and SIC Code(s)**. The pivot table should show multiyear grand totals for each company when filtering over multiple years as well as appropriate grand totals for SIC code when selecting multiple SIC codes from the slicer (**Master the Data**)
			* Test your filters using companies in the same SIC code classification as Home Depot
			* **Master the data**. I will not tell you the company SIC code
		- **Pivot table three** showing the fiscal year month and the total number of companies for each fiscal year month and the total company percentage breakdown for each month (**Hint**: add your company to the values field again and right click on one of the counts and select show values as % of column total)
		- **Pivot Table four** showing all companies **(use company name)** in a particular SIC code group. **with ability to filter using slicers by fiscal year month and SIC Code(s)**. The pivot table should show count of the number of companies within each SIC code with appropriate totals and subtotals for month and SIC code when filtering over multiple months and/or SIC codes.
1. Submit the completed Excel file via the D2L dropbox. (You are not submitting screenshots)
	1. Files submitted to the wrong dropbox will receive a **grade of 0**
	2. Failure to follow directions will result in a grade of ZERO
2. **Additional Note: Make sure you submit the Excel file and not the temp file that is created when you are in Excel.**
	1. **The temp file is erased when you exit an Excel, but there may be a delay before that happens.**
	2. **The Temp file size is only 1 KB**
	3. **It is your responsibility to make sure that you upload the correct file. Failure to do so will result in a grade of zero**
3. This is **not a** group assignment. Students should work independently.
	1. **Copying/plagiarism** will result in a **grade of 0** for all parties involved.
4. **Due on 03-12-2025, 11:30 p.m.**
5. **Remember, file must be virus free**. (**Any assignment received containing a Virus receives a grade of 0)**