



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

## HPM 714, Section 001

### Advanced Spreadsheet Modeling for Business

(No. Credit Hours: 3)

*Department of Health Policy and Management*

Gillings School of Global Public Health

*Syllabus Spring/2019*

*Rosenau (PH) - Rm 0228*

*Mondays, 4:40 – 7:10pm*

Instructor:	Travis Day
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Phone:	(919) 962-4927
Web:	<a href="http://public.kenan-flagler.unc.edu/faculty/dayt/">http://public.kenan-flagler.unc.edu/faculty/dayt/</a>
Office hours:	8:30am – 2:30pm Monday – Thursday

### Course Overview

This course focuses on using advanced features of Microsoft Excel to create efficient spreadsheet models of common and complex business problems. It challenges students to use critical thinking and analysis to find effective solutions to real-life situations. It is designed to be an extremely practical class, in which the skills learned can be put to immediate use in other classes, the workplace, and other areas of life. Recruiters and employers repeatedly stress the vital importance of the advanced spreadsheet skills that are covered in this course--skills that will prove invaluable for everyone from interns to CEOs.

The format of this course is primarily "online," allowing students the flexibility to review course material according to a pace and schedule that fits their needs. Students will complete assignments each week on their own with assistance and guidance from the professor, whenever needed, via email and/or remote assistance software. Live, in-class lectures are also held on occasion throughout the semester.

Course topics include: an introduction to problem solving and decision making, statistical analysis tools, determining effective data display with charts, applying logic in decision making, locating and managing data with reference functions, evaluating the financial impact of loans and investments, organizing data for complex analysis, performing what-if analyses with data tables and scenarios, enhanced decision making with goal seek and solver, and troubleshooting and customizing workbooks with visual basic programming and other advanced tools.

The course will also cover the use of Outlook as a personal information manager, facilitating greater productivity in the workplace. Although advanced features of Outlook are explored, the course will concentrate on sophisticated spreadsheet modeling with Excel. It is assumed that students already have a fundamental understanding of spreadsheets and general familiarity with Excel. This course covers advanced material--it is not intended to teach introductory Excel skills. Regardless of a

user's current proficiency in Excel, students will undoubtedly be able to benefit from the additional skills learned in the course. ([Student Comments](#) about the course)

Please refer to the [course schedule](#), for additional details regarding specific topics covered.

## Learning Objectives and HPM Competencies

	<i>Course Learning Objective</i>	<i>HPM Competencies</i>
1.	Apply a variety of analytical tools that facilitate enhanced and applied decision making and problem solving	Analytical Thinking Information Seeking Innovative Thinking Communication Skills
2.	Create efficient spreadsheet models of common and complex business problems	Analytical Thinking Financial Skills Performance Measurement
3.	Increase personal productivity in the workplace using advanced features of Microsoft Outlook.	Achievement Orientation Professionalism Project Management

## Resources

### Websites

Course syllabus: <https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714>

Course schedule: <https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714/schedule.htm>

Course management site: <https://kenan-flagler.instructure.com/courses/2519971>

### Email

Please ensure your email Subject lines are informative, your questions are specific, and that your questions haven't already been addressed in the FAQ's or Notes. When sending me email to ask questions about homework, etc., please enter your class name at the beginning of the Subject of the email. Since I normally teach multiple classes each semester, having more descriptive email Subjects will allow me to more easily organize and respond to incoming mail. A sample email Subject could be:

HPM 714 Outlook Setup: Cannot Send Mail from Outlook.com Account

OR

HPM 714 Ch1 Homework: Problems with Custom Number Format

All homework assignments should be submitted using the specific instructions and hyperlinks provided in each set of homework instructions. Correspondence of any nature should be sent separate from assignments. I typically do not read and respond to messages sent as part of a homework submission. Thanks!

### Online Office Hours

I am typically available to answer questions and assist students between 8:30am and 2:30pm, Monday through Thursday. I strive to provide quick responses to students during my posted online office hours, but I am often available to provide help outside of these "online office hours." I am available by email, phone, and can even remotely connect to your PC to provide assistance, when needed. If you need any extra help, do not hesitate to contact me. If you are having problems, please do not wait until the day before a HW is due or wait until the week before exams to seek assistance.

## Prerequisites

There are no prerequisite courses required to take the course, but students are expected to have basic familiarity with how to use spreadsheets. This course is not a beginning level computing skills course. We will cover much material in a short period of time, at a pace that some could find difficult to keep up with. If you are not already familiar with Excel, you may want to brush up on it on your own before class starts, so that you won't fall behind in the course.

## Textbook

The text we'll be using is "Succeeding in Business with Microsoft Office Excel 2013: A Problem-Solving Approach" written by Gross, Akaiwa & Nordquist; published by Cengage Learning with ISBN: 978-1-285-09914-9. An "eTextbook" version of the textbook is also available for purchase (but you do not need to purchase both...you may choose either the standard text or the eTextbook). (Please note that the eTextbook version is usually a "rental"...available only for a certain period of time, like 180 days.)

## Accounts

You should have a valid UNC email account ([ONYEN](#)). (You may also be asked to create a personal Outlook.com account, if you don't have one already.)

## Software

### *Required Software*

I recommend the Office 365 subscription available to UNC students. Go to <https://office.unc.edu> and login with your UNC ONYEN account to download and Install Office. Visit <https://office365.unc.edu> for additional information on Office 365.

NOTE: This class was designed for use with the Windows version of Excel & Outlook. The Mac version of Office can be used for the majority of features we will cover, but not all features and capabilities exist in the Mac versions of software. Businesses & Organizations often support only certain versions of software or operating systems (because of cost, resources, convenience, to ensure compatibility, etc.). Seeing as how you may likely need to use the Windows version of Excel & Outlook in the workplace, I would rather you become familiar with the Windows version now rather than wait and familiarize yourself with it after you are "on the job."

(Please explore [Options for Students with Apple Computers](#).)

## Evaluation / Grading

The final grade for this course will be determined by the following percentages:

Quizzes 5%  
Homework 45%  
Final Exam 50%

## Quizzes

Your "Quiz" grade will be based on all quizzes assigned throughout the semester. It will be calculated using a "point" basis...your total points earned divided by the total number of points possible. Quiz questions throughout the semester typically count equally (each being worth 1 point). Since the "quiz" portion of your grade is based on the total number of quiz points earned throughout the entire semester, quizzes with fewer questions/points will essentially carry less "weight." If a quiz has only 10 questions and you miss one question, it counts the same as if you missed one question on a 50-point quiz...therefore just because a quiz has fewer questions doesn't mean those questions are more important and should carry more weight in determining your overall quiz grade. Some chapters in the textbook have less material for which you must be responsible; therefore assignments for these chapters may be weighted less heavily.

Quizzes will be taken via the course management system for the course. Details for taking the quizzes will be posted. However, quizzes will always be open-book and open-notes, but “closed friends.” Do not accept any help or materials from anyone else to aid in the completion of your quizzes--receiving unauthorized assistance will be considered an honor code violation.

Please submit your Quiz by the due date listed on the online schedule. **Quizzes cannot be taken after the due date.**

## Homework

Your "Homework" grade will be based on all homework assigned throughout the semester. Similar to the Quiz grade, Homework will be calculated using a "point" basis...your total points earned on the homework divided by the total number of points possible on the Homework.

All homework should be submitted by the due date and time listed on the online schedule via email **using the links provided within each set of homework instructions, and sent from your UNC email account.** (Please don't use your Gmail, Hotmail, or other email account.) If an assignment is due by 8:00 a.m., then it must be received by 8:00 a.m.; an assignment received at 8:01 a.m. is considered late. Late Homework Assignments will be penalized 10% of the HW grade, plus an additional 1% for each hour it is late. (If your HW is an hour late, you'll be deducted 10%+1%=11%; if it's 10 hours late, it'll be deducted 10%+10%=20%. If your HW is 48 hours late, your grade will be deducted 58%.) Assignments will be graded on professionalism, accuracy, style and completeness according to guidelines provided. Details of the homework and grading guidelines will be provided.

If you have any questions about your assignment grade, contact the professor **immediately**...please do not wait until the end of the semester to dispute a grade. You may have up to a week after receiving your homework feedback to dispute a grade. Please note that anytime a grade is disputed the entire HW may be re-graded by the professor, which could result in a totally different (and sometimes lower) grade.

## Final Exam

The Exam will cover material from homework assignments, quizzes, online notes, and the textbook.

A large portion of your grade will come from your exam performance. Just because you have performed well on your homework and/or quizzes, please do not automatically assume you will receive a good grade in the class. Quizzes are open-book and open-notes, and you may receive assistance (from the professor and classmates) on your homework. Your final exam performance is the real test of your comprehension of course materials, therefore the exam is weighted heavily.

## Disability Accommodation

UNC-CH supports all reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or a pregnancy complication resulting in difficulties with accessing learning opportunities. All accommodations are coordinated through the UNC Office of Accessibility Resources & Services (ARS), <https://accessibility.unc.edu>; phone 919-962-8300 or email [accessibility@unc.edu](mailto:accessibility@unc.edu). Students must document/register their need for accommodations with ARS before any accommodations can be implemented.

## UNC Honor Code

The principles of academic honesty, integrity, and responsible citizenship govern the performance of all academic work and student conduct at the University as they have during the long life of this institution. Your acceptance of enrollment in the University presupposes a commitment to the principles embodied in the Code of Student Conduct and a respect for this most significant Carolina tradition. Your reward is in the practice of these principles. Your participation in this course comes with the expectation that your work will be completed in full observance of the Honor Code. Academic dishonesty in any form is

unacceptable, because any breach in academic integrity, however small, strikes destructively at the University's life and work.

**Quizzes should be completed on your own, without any guidance, assistance or materials from anyone except what is provided & allowed by the professor.**

You may not use or access any previously assigned questions or problems from prior semesters of this course without my permission. I do not circulate such materials, but it is possible that they may have come into your possession through some other means. Please note that you are forbidden to read or use such material.

Even on assignments where I have given you permission to consult with your colleagues, you may not simply copy another's work and submit it as your own. You must still answer each question and complete each problem on your own, without accessing another student's files; you should never copy any work from another file. While you are allowed to help each other with the homework, you must never actually share files. Never use someone else's homework file and never allow anyone else to use your own homework file. **Sharing homework files will constitute an Honor Court violation and may lead to suspension from the university.** Students supplying homework files to others (even in a subsequent semester) are also guilty of violating the honor code and will be charged along with the "recipient" of the files.

You should place the honor code on a sheet at the beginning of every spreadsheet submitted and you should acknowledge compliance with the code by typing your name next to the honor code acceptance. Below is the honor code wording that should be included in submitted homework files:

On my honor, I have neither given nor received any unauthorized aid in completion of this assignment. I recognize that I am encouraged to help my classmates with questions or problems they may have, and I am also allowed to seek help from classmates. But ultimately, I have created and completed this assignment on my own. This file is my own. I have not referred to, used, or copied a file that has been given to me by anyone else, nor have I given a copy of my file to anyone else. I have used my own computer to complete the homework and I have not given anyone else access to my computer or to my files.

If you have any questions about your responsibility or the responsibility of faculty members under the Honor Code, please consult with someone in either the Office of the Student Attorney General (966-4084) or the Office of the Dean of Students (966-4042). You may also refer to "The Instrument of Student Judicial Governance" (<https://instrument.unc.edu>).

## Course Evaluation

HPM participates in the UNC-CH's online course evaluation system, enabled at the end of the semester by Scantron Class Climate. Your responses will be anonymous, with feedback provided in the aggregate. Open-ended comments will be shared with instructors, but not identified with individual students. Your participation in course evaluation is an expectation, since providing constructive feedback is a professional obligation. Feedback is critical, moreover, to improving the quality of our courses, as well as for instructor assessment. Students are notified when the evaluation is available online, towards the end of each semester.

## Class Schedule

The public Online Schedule for the course (<https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714/schedule.htm>) contains a schedule of the semester's assignments. This schedule may change periodically, so please refer back to the Online Schedule (rather than a printed copy) to ensure you are viewing the most recent schedule of assignments.