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 Fall/2017
Rosenau (PH) - Rm 0228
Thursdays, 5-8pm

Instructor: Travis Day
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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

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

Website
Course syllabus:  [https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714](https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714)
Course schedule:  [https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714/schedule.htm](https://public.kenan-flagler.unc.edu/faculty/dayt/hpm714/schedule.htm)
Course management site (homework, quizzes, etc.):  [https://sakai.unc.edu/portal/site/hpm714.fall2017](https://sakai.unc.edu/portal/site/hpm714.fall2017)

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 students 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, available at UNC Student Stores, Ram Book & Supply (direct link), Amazon…(Review the Table of Contents.) 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 Gmail and a Hotmail/Live/Outlook.com account, if you don’t have one already.)

Software

Required Software
For this class, you’ll need Microsoft Office 2013 or 2016 for Windows (not Apple/Mac). Various versions are available...your version should contain at least Excel, PowerPoint, Word & Outlook. You should probably install Microsoft Office 2013 or 2016 Professional, which is available free to all UNC Students. If your computer has an older version of Office and/or Excel, please either upgrade your version of Microsoft Office or plan to use a computer with at least Office 2013 in order to complete your Homework assignments.

Obtaining the Software
Student fees (already paid with tuition) cover Microsoft Licensing for certain Microsoft software (including Microsoft Office
Professional). If you do not already have the software, you may order Microsoft Office Professional for Windows through UNC. Go to https://software.unc.edu and follow the links and instructions from there. Upon purchasing the software, you are encouraged to install it on your own. The UNC Helpdesk (located at the bottom of the Undergrad library, or on the first floor of the Student Academic Services Building (SASB) on South Campus) is available as a resource should you experience problems, but please attempt to perform such software installations and configurations on your own first.

Why am I required to use Microsoft Windows software?
Businesses & Organizations often support only certain versions of software or operating systems (because of cost, resources, convenience, to ensure compatibility, etc.) In past years, allowing students to use various different versions of Office has led to much confusion and many headaches (for me and students alike). Therefore it is important that we standardize on a single version for this course. It is better for you to learn it in school and become familiar with it now rather than wait & have to learn it “on the job.”

(Please explore recommended 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 Canvas. Details for taking the quizzes will be posted on the Canvas site, but 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 assignments should be sent to hpm714homework@unc.edu. Please use the “Submit your Homework” links within the instructions of each homework assignment. Correspondence of any nature should be sent separate from assignments to hpm714@unc.edu. I typically only read and respond to messages sent directly to me (not messages sent to the Class Assignments mailbox). Please make sure your email Subject lines are informative, your questions are specific, and that your questions have not already been addressed in the FAQ's or Notes. Thanks!
All homework should be submitted as attachments using your UNC email account by the due date and time listed on the online schedule. (Please do not 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, and an additional 1% for each hour it’s 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.

**Recognizing, Valuing, and Encouraging Diversity**
The importance of diversity is recognized in the mission statement of HPM. In the classroom, diversity strengthens the products, enriches the learning, and broadens the perspectives of all in the class. Diversity requires an atmosphere of inclusion and tolerance, which oftentimes challenges our own closely-held ideas, as well as our personal comfort zones. The results, however, create a sense of community and promote excellence in the learning environment. This class will follow principles of inclusion, respect, tolerance, and acceptance that support the values of diversity.

Diversity includes consideration of: (1) life experiences, including type, variety, uniqueness, duration, personal values, political viewpoints, and intensity; and (2) factors related to “diversity of presence,” including, among others, age, economic circumstances, ethnic identification, family educational attainment, disability, gender, geographic origin, maturity, race, religion, sexual orientation, social position, and veteran status.

**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. 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.

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.