



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

**BUSI 520, Section 001**  
***Advanced Spreadsheet Modeling for Business***  
(No. Credit Hours: 3)

*Strategy & Entrepreneurship*  
Kenan-Flagler Business School

*Syllabus Spring 2020*  
*Koury Auditorium – McColl 2700*  
*Mondays, 7:30pm – 10:00pm*

Instructor:	Travis Day
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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

[\(PDF file for syllabus\)](#)

## 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 skills that are 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. (View [Student Comments](#) from previous classes.)

The Syllabus in [Canvas](#) contains detailed information about the course, including all notes and assignments. However, general information can also be accessed outside of Canvas via the [Public Syllabus](#).

## Instructor Correspondence

### 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:

BUSI 520 Outlook Setup: Cannot Send Mail from Outlook.com Account

OR

BUSI 520 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.

## Course Requirements

### Prerequisites

No prerequisite courses are required in order to take this 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 will not fall behind in the course. You may find Office Training at <https://support.office.com/>.

## Registration

This course is geared towards undergraduate Business Administration majors and minors. Other students (including grad students) are also welcome to register and do not need special permission to enroll. However, only a certain number of seats are initially available for non-business school students. At the beginning of the course registration process, the non-business-major seats fill up quickly. However, be sure that you get on the waitlist by the “Last Day for Students to Add Themselves to a Waitlist” (which is typically a couple weeks before classes start). After a certain date (about a week before classes begin), open seats in the class will be filled by students on the waitlist and students should continue to be added from the waitlist as spaces in the class become available. So even if you are #25 on the waitlist before classes start, there may be a good chance that you will get added to the class from the waitlist. After the “Last day for all students to add a course or late register using the web registration system” (usually a week after classes begin), no additional students will be admitted into the course. Important dates regarding registration can be found at <http://registrar.unc.edu/>.

Please note that I usually have a LOT of students trying to get into the class. Due to the size of my class, I typically do not handle course registration matters and do not make exceptions for individual students. All enrollment is handled through Connect Carolina and the automated wait list set up for the class. This is the fairest and easiest way to handle enrollment. (For BUSI 520, registration by non-business majors is NOT handled through the “non-business student request form”...enrolling is only possible via Connect Carolina.) If you are unable to register for the class or the waitlist via Connect Carolina, then you unfortunately will not be able to enroll.

## Textbook

The text we will 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. A “Digital” version of the textbook is also available...you may choose to buy the standard text or rent a Digital version.

## Software

You need Office 2016, 2019 (or an Office 365 subscription). If you do not already have one of these version installed, you may contact UNC’s Software Acquisition office (<https://software.unc.edu>) for information on ordering and downloading a desktop version of Microsoft Office. You may also visit UNC’s ATN Helpdesk (at the bottom of the Undergraduate Library) and then can install the software for you. A third option is to go to go to <https://office.unc.edu> and login with your UNC ONYEN account to download and Install Microsoft Office 365. This is a subscription version of Microsoft Office which will be disabled after graduation. You may 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. For example, many keyboard shortcuts I want students to learn (like any of the Alt+... menu shortcuts) are not possible in the Mac version of Excel. Other "Mac versions" of keyboard shortcuts are different from the Windows version shortcuts. In general, I feel that students who use Mac's to complete homework will be somewhat at a disadvantage in the class and in the workplace after graduation. 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 are more likely to use the Windows version of Excel & Outlook in the workplace, I would rather you become familiar with the Windows software now rather than wait and familiarize yourself with it after you are "on the job."

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

## Course Evaluation

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

Quizzes 0% (to help you prepare for the homework and the final exam)

Homework 45%

Final Exam 55%

### Quizzes

Quizzes will be taken via Canvas. Details for taking the quizzes will be posted on the Canvas site, but quizzes are normally 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

### Homework

Your "Homework" grade will be based on all homework assigned throughout the semester. 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. Since the "homework" portion of your grade is based on the total number of homework points earned throughout the entire semester, assignments with fewer questions/points will essentially carry less "weight."

All homework should be submitted via email **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 non-UNC 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.

**Exam Exceptions:** Any student requesting to take an exam outside of the scheduled window must receive official approval from the appropriate academic program office. Examples of circumstances which would provide justification for rescheduling an exam include: severe sickness, hospitalization or a death in the immediate family. Conflicts due to scheduled travel arrangements or work obligations are not valid reasons for rescheduling an exam. Similarly, students should not schedule interviews or office visits with prospective employers in a fashion that creates a conflict with a scheduled exam unless no other visit option is available.

## Helpdesk Usage Clarification

Please remember that the Helpdesk is not intended to be used for helping you complete your Homework Assignments! If you experience errors or other problems with your computer while trying to complete your homework, please let me know. If I am unable to help you resolve your problem, I may direct you to contact the Helpdesk for assistance.

## Honor Code

The University of North Carolina at Chapel Hill has had a student-led honor system for over 100 years. Academic integrity is at the heart of Carolina and we all are responsible for upholding the ideals of honor and integrity. The student-led Honor System is responsible for adjudicating any suspected violations of the Honor Code and all suspected instances of academic dishonesty will be reported to the honor system. Information, including your responsibilities as a student is outlined in the Instrument of Student Judicial Governance. Below is the Appendix A from the Instrument on your responsibilities. Your full participation and observance of the Honor Code is expected. Refer to the statement of commitment included in Appendix A (page 28) of the Instrument of Student Judicial Governance (<https://instrument.unc.edu/>).

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>).

## Other Info

Any student who is impacted by discrimination, harassment, interpersonal (relationship) violence, sexual violence, sexual exploitation, or stalking is encouraged to seek resources on campus or in the community. Additional resources are available at <https://safe.unc.edu/>.

The University of North Carolina at Chapel Hill facilitates the implementation of reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability or pregnancy complications resulting in difficulties with accessing learning opportunities.

Students with disabilities who have specific needs for taking the final exam should contact me personally at the beginning of the term, well in advance of the exam. (An automated message from ARS does not count as "contacting the instructor.") My students with disabilities normally take my final exam at the same time as the rest of the class and in the same room. Taking the exam at a different time and/or place could put students at a disadvantage if they need to ask me any questions regarding the exam (such as clarifications about a particular exam question). Disability students start at the same time as everyone else and may stay extra time, as allowed.

## Schedule

The public [Online Schedule](https://public.kenan-flagler.unc.edu/faculty/dayt/busi520/schedule.htm) for the course (<https://public.kenan-flagler.unc.edu/faculty/dayt/busi520/schedule.htm>) contains a schedule of the semester's assignments and due dates. Students are expected to attend live lectures.

However, should an extraordinary circumstance arise whereby a student cannot attend class, I will request that the lecture be recorded (using software such as Panopto or Zoom) and post a link to the recorded material.

Detailed course material (including online notes, recorded material, quizzes, homework assignments, etc.) can be found in the course management site for the course: <https://kenan-flagler.instructure.com/>. This site is published sometime close to the first day of class, and please note that you must be officially enrolled in the course in order to access this site. (Auditing is not permitted.)