

# **Advanced Spreadsheets for Business Applications (AP/ADMS 3370)**

## **Winter 2021**

### **Course Outline**

#### **Instructor and Course Information**

Instructor: R. Huang  
E-mail: [rhuang@yorku.ca](mailto:rhuang@yorku.ca)  
Lectures: Wednesday 7:00 PM – 10:00 PM  
Course website: <http://www.yorku.ca/rhuang>  
If not in-person, then  
Zoom link: <https://yorku.zoom.us/j/2756888472> at 7PM on Wednesdays.

#### **Course description and objectives**

This course provides students with hands-on experience and skills with Excel. Students learn various functions and commands of Excel as well as how to plan, create, and program spreadsheets for common business applications.

This course offers students the opportunity to master the advanced functionality of Excel, and to apply those skills to genuine business applications such as financial modeling, reporting, and the automation of accounting and financial tasks. Although the basic functions of Excel will be covered, areas of focus include graphs and charts, the use of advanced financial and statistical functions, analytical tools, reporting templates, linking of worksheets and workbooks, importing and manipulating data, macros (automation of tasks), auditing tools, and other features.

The main topics to be covered include pivot tables, what-if analysis, financial and statistical functions, multiple-sheet workbook management, XML, power add-ins, collaboration, and macros.

After completion of this course students should be able to:

1. Construct, modify, and print a professionally designed and formatted spreadsheet.
2. Create and use complex and advanced financial and statistical functions.
3. Using various Excel tools, perform what-if analysis and projections on business data.
4. Link data from several workbooks to one workbook and share data with other applications.
5. Analyze data using Power Add-ins.
6. Write VBA code using VBA Editor.

#### **Text and material**

Poatsy, A., K. Mulbery, and J. Davidson (2019). Exploring Microsoft Office Excel 2019 Comprehensive, Pearson College Div; Comprehensive edition'

#### **Evaluation**

- |   |                               |     |
|---|-------------------------------|-----|
| 1 | Weekly quizzes (best 8 of 10) | 20% |
| 2 | Midterm Exam                  | 40% |
| 3 | Final Exam                    | 40% |

This schedule is subject to change. Check at least once a week.

Lecture	Date	Topic	Chapter
1	Jan.13	Introduction	Office Ch1 Excel Ch1
2	Jan.20	Formulas and Functions	Excel Ch2 & Ch3
3	Jan.27	Datasets and Tables	Excel Ch4
4	Feb.03	Subtotals, PivotTables, and PivotCharts	Excel Ch5
5	Feb.10	What-If Analysis	Excel Ch6
	Feb.17	No Class (Reading Week)	
6	Feb.24	In-class Midterm Exam	
7	Mar.03	Specialized Functions	Excel Ch7
8	Mar.10	Statistical Functions	Excel Ch8
9	Mar.17	Multiple-Sheet Workbook Management	Excel Ch9
10	Mar.24	Power Add-Ins	Excel Ch10
11	Mar.31	Additional Specialized Functions	Excel Ch11
12	Apr. 07	VBA	Excel Ch12

## **General Policy**

1. **WARNING: Distribution or uploading of course content is STRICTLY PROHIBITIVE. All material is copyright protected.**
2. Please ensure you read all documentation on the course website.
3. Please note that this is now a remote teaching online course. The entire course, including the lectures, participation/discussion and test/exam-taking, will take place online.
  - a. the recordings should be used for educational purposes only and as a means for enhancing accessibility.
  - b. students **do not** have permission to duplicate, copy and/or distribute the recordings outside of the class (these acts can violate not only copyright laws but also FIPPA).
  - c. all recordings will be deleted after the end of classes.
4. It will be your responsibility to regularly check online posts and your email.
5. This course **might** require the use of online proctoring for examinations. The instructor may use an online proctoring service to deliver the exam(s), which would be administered through the Learning Management System (e.g. Moodle, Canvas, etc.). Students are required to have access to minimum technology requirements to complete examinations. If an online proctoring service is used, students will need to become familiar with it at least five days before exam(s). For technology requirements, Frequently Asked Questions (FAQs) and details about the online proctoring service will be made available if used. Students are required to share any IT accommodation needs with the instructor as soon as they are able.
6. Several platforms will be used in this course (e.g., eClass, Canvas, Zoom, etc.) through which students will interact with the course materials, the course director / TA, as well as with one another. Please review the syllabus to determine how the class meets (in whole or in part), and how office hours and presentations will be conducted.

Students shall note the following:

- Zoom is hosted on servers in the U.S. This includes recordings done through Zoom.
- If you have privacy concerns about your data, provide only your first name or a nickname when you join a session.
- The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it.

Technology requirements and FAQs for Moodle can be found here -

<http://www.yorku.ca/moodle/students/faq/index.html>

## **Virtual office hours:**

Please send your questions via email. All questions will be answered within 24 to 48 hours' time. A one-on-one Zoom meeting may be set up depending on the nature of the question. Please note that emails from public email providers such as Gmail and Hotmail might be screened. It is best to use your York email account for this course.

## **RELEVANT UNIVERSITY/LA&PS/SCHOOL REGULATIONS**

**Deferred Final Exams:** Deferred standing may be granted to students who are unable to write their final examination at the scheduled time or to submit their outstanding course work on the last day of classes. Details can be found at <http://myacademicrecord.students.yorku.ca/deferred-standing>

Any request for deferred standing on medical grounds must include an Attending Physician's Statement form; a "Doctor's Note" will not be accepted.

DSA Form: [http://www.registrar.yorku.ca/pdf/deferred\\_standing\\_agreement.pdf](http://www.registrar.yorku.ca/pdf/deferred_standing_agreement.pdf)

Attending Physician's Statement form: <http://registrar.yorku.ca/pdf/attending-physicians-statement.pdf>

In order to apply for deferred standing, students must register at:

<http://sas-app.laps.yorku.ca>

Followed by handing in a completed original Deferred Standing Agreement (DSA) form and supporting documentation directly to the main office of the School of Administrative Studies (282 Atkinson) and add your ticket number to the DSA form. **During this time of remote learning, you will be required to submit the forms via email to [apsas@yorku.ca](mailto:apsas@yorku.ca).** The DSA and supporting documentation must be submitted no later than five (5) business days from the date of the exam. These requests will be considered on their merit and decisions will be made available by logging into the above-mentioned link. No individualized communication will be sent by the School to the students (no letter or e-mails).

Students with approved DSA will be able to write their deferred examination during the School's deferred examination period. **Deferred exams might take place during the regular exams period or in subsequent weeks depending on the course;** precise dates are known when the Office of the Registrar publishes the final exam schedule of the term. No further extensions of deferred exams shall be granted. The format and covered content of the deferred examination may be different from that of the originally scheduled examination. The deferred exam may be closed book, cumulative and comprehensive and may include all subjects/topics of the textbook whether they have been covered in class or not.

**Academic Honesty:** The Faculty of Liberal Arts and Professional Studies considers breaches of the Senate Policy on Academic Honesty to be serious matters. The Senate Policy on Academic Honesty is an affirmation and clarification for members of the University of the general obligation to maintain the highest standards of academic honesty. As a clear sense of academic honesty and responsibility is fundamental to good scholarship, the policy recognizes the general responsibility of all faculty members to foster acceptable standards of academic conduct and of the student to be mindful of and abide by such standards. Suspected breaches of academic honesty will be investigated and charges shall be laid if reasonable and probable grounds exist.

Students should review the York Academic Honesty policy for themselves at:

<http://www.yorku.ca/secretariat/policies/document.php?document=69>

Students might also wish to review the interactive on-line Tutorial for students on academic integrity, at: <https://spark.library.yorku.ca/academic-integrity-what-is-academic-integrity/>

**Grading Scheme and Feedback Policy:** The grading scheme (i.e. kinds and weights of assignments, essays, exams, etc.) shall be announced, and be available in writing, within the first two weeks of class, and, under normal circumstances, graded feedback worth at least 15% of the final grade for Fall, Winter or Summer Term, and 30% for ‘full year’ courses offered in the Fall/Winter Term be received by students in all courses prior to the final withdrawal date from a course without receiving a grade, with the following exceptions:

*Note: Under unusual and/or unforeseeable circumstances which disrupt the academic norm, instructors are expected to provide grading schemes and academic feedback in the spirit of these regulations, as soon as possible.* For more information on the Grading Scheme and Feedback Policy, please visit: <http://www.yorku.ca/univsec/policies/document.php?document=86>

**In-Class Tests and Exams - the 20% Rule:** For all Undergraduate courses, except those which regularly meet on Friday evening or on a weekend, tests or exams worth more than 20% will not be held in the two weeks prior to the beginning of the official examination period. For further information on the 20% Rule, please visit: <http://secretariat-policies.info.yorku.ca/policies/limits-on-the-worth-of-examinations-in-the-final-classes-of-a-term-policy/>

**Reappraisals:** Students may, with sufficient academic grounds, request that a final grade in a course be reappraised (which may mean the review of specific pieces of tangible work). Non-academic grounds are not relevant for grade reappraisals; in such cases, students are advised to petition to their home Faculty. Students are normally expected to first contact the course director to discuss the grade received and to request that their tangible work be reviewed. Tangible work may include written, graphic, digitized, modeled, video recording or audio recording formats, but not oral work. Students need to be aware that a request for a grade reappraisal may result in the original grade being raised, lowered or confirmed. For reappraisal procedures and information, please visit the Office of the Registrar site at: <http://myacademicrecord.students.yorku.ca/grade-reappraisal-policy>

**Accommodation Procedures:** LA&PS students who have experienced a misfortune or who are too ill to attend the final examination in an ADMS course should not attempt to do so; they must pursue deferred standing. Other students should contact their home Faculty for information. For further information, please visit: <http://ds.info.yorku.ca/academic-support-accommodations/>

**Religious Accommodation:** York University is committed to respecting the religious beliefs and practices of all members of the community and making accommodations for observances of special significance to

adherents. For more information on religious accommodation, please visit:

<https://w2prod.sis.yorku.ca/Apps/WebObjects/cdm.woa/wa/regobs>

### **Academic Accommodation for Students with Disabilities (Senate Policy)**

The nature and extent of accommodations shall be consistent with and supportive of the integrity of the curriculum and of the academic standards of programs or courses. Provided that students have given sufficient notice about their accommodation needs, instructors shall take reasonable steps to accommodate these needs in a manner consistent with the guidelines established hereunder. For more information, please visit the Student Accessibility Services (formerly known as Counselling and Disability Services) website at <https://accessibility.students.yorku.ca>

York's disabilities offices and the Registrar's Office work in partnership to support alternate exam and test accommodation services for students with disabilities at the Keele campus. For more information on alternate exams and tests please visit <http://www.yorku.ca/altexams/>

Please alert the Course Director as soon as possible should you require special accommodations.