MBA – Fall 2009
OPIM 529–Advanced Excel for Managers

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Office Hours: by appointment
Classroom: FMAN G041
Time: Tuesday, 14:40-17:30

Course Objective:
The objective of this course is to provide the skills necessary to efficiently develop analytical spreadsheets in MS Excel that meet professional standards.

Learning Outcomes:
Upon successful completion of the course, the student should be able to:
1. Develop Excel spreadsheets that meet critical elements of style so that the worksheet is readable, change-tolerant and correct.
2. Create charts that are appropriate for the purpose and meet generally accepted quality standards.
3. Perform data analysis to explain, summarize and interpret data.
4. Audit a spreadsheet that may have been developed by someone else.

Course Material:
There is no required textbook, but the following reading material would help students not only in this course but also in the future.

Optional Reading Material:
The following is a list of web sites and books that you may benefit from, since there is always more to learn. (all web sites were viewed in September 2009)
5. MVP Web Sites, Microsoft Most Valuable Professionals, www.mvps.org/links.html

Course Web:
A SuCourse site will be maintained for the course. All lecture files, PowerPoint slides, assignments, their solutions, and other course related material will be available at this site. In-class exercises will be distributed and collected through this site, hence the
lectures will be held in a classroom with network access. In addition, course related announcement will be made at this site as well. Therefore, you are expected and encouraged to visit the site frequently.

**Instructional Design:**
The course is designed to be an interactive one, where students come to the classes with their laptops, work on the examples together with the professors and work on in-class exercises. The purpose of these is to maximize in-class learning.

**Grading:**

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>In-class Exercises</td>
<td>15%</td>
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<tr>
<td>Team Project</td>
<td>30%</td>
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<tr>
<td>Exam</td>
<td>35%</td>
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<tr>
<td>Assignments</td>
<td>20%</td>
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**Peer Evaluation in Teamwork**

You suppose to do your project with your team however you can discuss it with other classmates in order to get some idea and insight. At the end of the semester, we are asking you to provide an evaluation of the members of your team in your project.

Basically, you are judging the contribution of the members of your team. The scores you assign should not be merely functions of time spent by each member, but they should be measures of the "contribution;" their relative contribution to the idea generation, research, analysis, writing, oral presentation, report writing, etc. If the team was highly functional, and each member did what they committed themselves to, then you can assign the same mark to each member of the group. If, on the other hand, some members of the group did not fulfill their commitments and did not contribute as much as the others, then you can use an uneven distribution of points to reflect the differences in commitment and contributions.

Group dynamics are the responsibility of the members of the group. The group will be assigned one grade for the project. However, the individual grades for each group member will be calculated based on group performance evaluations that will be done at the end of the semester. If you feel that there is a free rider in your group, you would report him/her while filing group performance evaluations so that I can calculate the individual grades accordingly.

**Requirements:**

The project is the development of a professional spreadsheet model by teams of two. If there are an odd number of students taking the course, one team will have three students and that team will have to fulfill more in their project.
In-class exercises are designed to make the class more interactive for the purpose of maximizing learning in the classroom. The students will be allowed to help each other in these exercises. The professor will also provide help in some cases, as these exercises are not meant to be quizzes but a tool for active learning. For each in-class exercise students will receive a grade of 1 or 0. Generally, exercises with even some minor mistakes will receive a 1.

Homework assignments are always meant to be individually done. Doing otherwise will be treated in accordance with the academic code of the university. Since all the assignment solution will be Excel files, it is of utmost importance that you do not share your files with your classmates. Since, if you do so, your files may reach to any number of your classmates and some might plagiarize or copy from your file. In that case you will be held equally accountable for the academic dishonesty.

There will be one in-class exam that you will be taking using your laptops. Hence, the exam will be an open-notes exam. However, a system will be setup so that you cannot communicate on-line with anybody else. A make-up exam will be given within one week of the exam date only for students who have a valid medical or legal excuse.

Academic Honesty:
Learning is enhanced through cooperation and as such you are encouraged to work in groups, ask for and give help freely in all appropriate settings. At the same time, as a matter of personal integrity, you should only represent your own work as yours. Any work that is submitted to be evaluated in this class should be an original piece of writing, presenting your ideas in your own words. Everything you borrow from books, articles, or web sites (including those in the syllabus) should be properly cited. Although you are encouraged to discuss your ideas with others (including your friends in the class), it is important that you do not share your writing (slides, MS Excel files, reports, etc.) with anyone. Using ideas, text and other intellectual property developed by someone else while claiming it is your original work is plagiarism. Copying from others or providing answers or information, written or oral, to others is cheating. Unauthorized help from another person or having someone else write one’s paper or assignment is collusion. Cheating, plagiarism and collusion are serious offenses that could result in an F grade and disciplinary action. Please pay utmost attention to avoid such accusations. I will follow the university guidelines on academic dishonesty. It is your responsibility to read the university guidelines on this matter.

Tentative Course Schedule:

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<tr>
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<th>Topics: Introduction, Excel basics: Referencing, functions and formulas, Text functions, date and time,</th>
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<tbody>
<tr>
<td></td>
<td>Requirements:</td>
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<tr>
<td>2</td>
<td>Topics: math functions, financial functions</td>
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<tr>
<td></td>
<td>Charts, Dynamic named ranges, dynamic charting</td>
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</tbody>
</table>
Requirements: Hw 1

3
Topics: Pivot table and pivot chart, Visual display of quantitative information – best practice guidelines
Statistical functions, descriptive statistics, Basic graph formatting, FREQUENCY function, histograms, trend curves, regression analysis, distributions
Requirements: Hw 2

4
Topics: Methods of Regression (scatter plot, excel functions, data analysis tool),
Data tables, scenario manager, generating random numbers,
Requirements: Hw 3

5
Topics: Getting external (text, web, database) data,
Auto filter, advanced filter, sorting,
Requirements: Hw 4

6
Topics: Error proofing, conditional formatting, data validation, audit tool, data cleaning
Requirements:

7
Topics: Review and exercises
Requirements: