

OFF101: Office Procedures 1

Outcomes Alignment

EO	Soft Skill	Career Competency	Bloom Level	Where Practiced	Where Assessed
EO 1: Identify calculations and tools that can be used to solve business problems	Teamwork, Communication	10 Key, Office Math Skills	Applying	Watch & Discuss: Making Decisions Practice: Get Acquainted with Local Offices Watch & Discuss: Preparing a Job Description Practice: Reinforce Math Skills	Apply: Income Statement Apply: Employment Projections
EO 2: Recognize the steps needed to solve business problems	Teamwork, Communication		Applying	Watch & Discuss: Computer Types Practice: Use Data to Make Decisions	Apply: Leadership Styles

				<p>Watch & Discuss: Leadership Skills</p> <p>Practice: Reinforce Math Skills</p>	
EO 3: Perform calculations using whole numbers, fractions, decimals, and percentages		10 Key, Office Math Skills	Applying		Apply: Reinforce Math Skills
EO 4: Demonstrate ability to solve problems involving numbers		Office Math Skills	Applying	<p>Practice: Projected Income Statements</p> <p>Watch & Discuss: Training Budget</p> <p>Practice: Make a Deposit</p> <p>Watch & Discuss: Electronic Check Processing</p>	<p>Apply: Reconcile a Cash Drawer</p> <p>Apply: Payment Discounts</p>

Home Page

Title	Description	URL / Parameters / Notes
Intro	Welcome to OFF101: Office Procedures 1! Workers in many different types of jobs perform office tasks. Examples include the recruiter in a human resources department, the technician in a chemical laboratory, the buyer in a department store, and the auditor in a public accounting firm. All these workers perform a range of office tasks during a typical work week. All workers, regardless of their duties, must understand how office functions relate to their work. They must also know how their work relates to the total organization. This course addresses these topics and provides practical experience!	Add intro. 2-3 sentences. Engage the students. Get them excited about the course. Help them understand why they are taking it.
Announcements from Your Instructor		Leave blank unless you have course announcements you want to roll with the course.
Course Outline		The course outline is a Word doc. Link the syllabus here.

Shake Hands	Introduce yourself to the class. What is your major? What do you want to do or are currently doing for work? Do you have pets? Be sure your post is at least 250 words and that you respond at least to two peers' posts with a minimum of 100 words each.	
Raise Your Hand	<p>This area is set aside for you to ask general questions about your class, get clarification on course work, report an error, or communicate other issues in the online class. Please start a new discussion for each issue you wish to report. When experiencing a problem check to see if someone has already communicated the issue. If so, you may quickly find your answer and/or be able to provide more details in the already created thread. If not, then start a new thread for any new issues not currently reported.</p> <p>Select "add discussion" below to report a NEW issue. To contribute additional information on an existing issue, click on the issue below and select Reply in the lower right corner to comment and provide more information.</p>	
Additional Resources		Create folders and add course resources for students and instructors to this area.
Checklist	This item shows a complete listing of all Moodle activities to be completed in this course. You are able to manually check the items to track your progress in this course. The progress bar across the top will let you know how far along you are to 100% completion. The listing can also be printed to serve as a manual reminder of the work required in the class. As always, if you have any questions, please contact your instructor.	<i>Production Note:</i> Moodle automatically create a list of the activities, assignments, and assessments.

[Write Name of LTI Link]	None	Add any top-level LTI links here, such as eBooks or Cengage MindTap. If there are no top-level LTI links, type "None." <i>Production Note:</i> If there are no top-level LTI links, do not include this in the course.
Slack	Slack is a group chat tool that you can use to ask immediate questions to your instructor or even chat with your fellow classmates. Select the Slack button on your left to get started.	[Production Note: This is a new page and instructions will be forthcoming.]
Textbook	<i>The Office: Procedures and Technology, 7th Edition</i> Oliverio, Pasewark, & White ISBN-10: 1-337-28136-0 ISBN-13: 9781337281362	[Production Note: Request an eBook link or MindTap instance from Cengage and add the link to the Moodle master]
Course Version	v1.0 – This course version is a new build based on the existing Syllabus including Course Objectives. A new textbook was used.	

Faculty Guide

Title	Description	URLs
Faculty Guide		The Faculty Guide is a Word doc. Link the Faculty Guide here. <i>Production Note:</i> Make this page Faculty Only so that students cannot access it.

Week 1 – Lesson 1 – The Office Environment

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
EOs	EO 1: Identify calculations and tools that can be used to solve business problems.						
Intro	In this lesson, you will demonstrate an understanding of structures of businesses, not-for-profit entities, and government units. You will learn how your role fits into an organization, whether you are an office manager or an office worker.						
Learn: Read	Chapter 1: The Office Environment	13 pages	.5				EO1
Learn: Watch	This brief video explains the foundations of Excel. <ul style="list-style-type: none"> Microsoft Excel Video (length: 32:48) 	32:48	1.5				EO1
Watch & Discuss: Making Decisions	The video below discusses the pros and cons of telecommuting for work. Watch the video, and then participate in the discussion topic that follows. <ul style="list-style-type: none"> Is Telecommuting for You? (length: 3:29) <p>Assume that you have completed your studies and are seeking your first full-time position. You have been interviewed by two companies. Each company has offered</p>	3:29	2.5		2	25	EO1

	<p>you a position. You like both companies as far as the nature of the work, the salary, and the employee benefits. However, the difference between the companies lies in <i>where</i> you will be doing the bulk of your work.</p> <p>At Company A, you would be expected to come to headquarters each day. The company has current computers and other technology, and the supervisor seems very helpful and friendly. At Company B, you would be telecommuting. Company B would provide you with all the equipment for your workstation at home. You would have access to your supervisor via telecommunications. From time to time, possibly no more than once in three weeks, you would be expected to attend a training session or a team meeting at headquarters. Which position would you accept?</p> <ol style="list-style-type: none"> 1. Make a list of the factors you would consider in making a decision about which job to accept for your reference purposes. 2. Write a brief paragraph in which you discuss the basis for making your decision. <p>Online students only: Online Students Only: It is recommended to respond to the starter question by Tuesday and make all follow up posts by Wednesday.</p>						
<p>Practice: Get Acquainted with Local Offices</p>	<p>In this practice activity, you will become familiar with the types of offices in your community.</p> <p>Instructions:</p> <ol style="list-style-type: none"> 1. Develop a list of four or five major employers in your area. (major employer: one employing over 100 people) 			.5	2	50	EO 1

	<p>2. Find answers to the following questions by visiting the company, talking with an employee, or accessing the company's website.</p> <ul style="list-style-type: none"> ● What are the primary products or services of the business or organization? ● Based on your research, estimate the percentage of the employees working at this location in offices? ● What is the primary purpose of the office? What tasks do office workers perform? ● Do any employees work in an alternative office? How many workers telecommute? If there are workers who telecommute, how many of them are considered office workers? ● What technology is being used in preparing letters and reports? for telecommunications? for records management? ● In general, determine whether the technology in use is current or somewhat out of date. <p>3. Using PowerPoint (or other presentation software tool), create a presentation of your findings. Be sure to:</p> <ul style="list-style-type: none"> ● choose a design theme ● apply animations and transitions to your presentation. ● include a minimum of 10 slides ● start with an introduction slide, ● end with a conclusion/summary slide <p>Submit your completed presentation.</p>						
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<p>Apply: Income Statement</p>	<p>The goal of a business is to make a profit. Financial statements such as income statements and balance sheets report how successful a business has been in achieving this goal. In this assignment, you will build an income statement for a business, Sweet Treats, by following the instructions shown below.</p> <p>Instructions:</p> <ol style="list-style-type: none"> 1. Use spreadsheet software to create an income statement for Sweet Treats that includes the data shown below. Format the income statement similar to the one shown in Figure 1-3. Use appropriate number formats and rules under numbers as shown in Figure 1-3. 2. Enter the appropriate headings and date the income statement for the year ended December 31 of the current year. 3. Enter a formula to subtract the cost of goods sold from sales to find the gross profit on sales. 4. Enter a formula to subtract the total operating expenses from the gross profit on sales to find the net income from operations. 5. Enter a formula to subtract other expenses or add other income to find net income before income tax. 6. Enter a formula to subtract income tax to find net income after income tax. 		1.5	.5	2	100	EO 1
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	<p>7. Enter formulas to calculate the percentage of sales for gross profit on sales, net income from operations, net income before tax, and net income after tax. (Divide each number by sales.)</p> <p>8. One goal of Sweet Treats is to have net income that is 25 percent of sales or higher. Assuming the company sells the same amount of merchandise and expenses and taxes remain the same, how much would the company have to increase prices to meet this goal?</p> <p>Data for an income statement for the year ended December 31 of the current year:</p> <table data-bbox="378 812 913 1274"><tr><td>Sales</td><td>\$325,000</td></tr><tr><td>Cost of Goods Sold</td><td>175,000</td></tr><tr><td>Operating Expenses</td><td></td></tr><tr><td> Advertising Expense</td><td>1,000</td></tr><tr><td> Delivery Expense</td><td>2,000</td></tr><tr><td> Office Supplies Expense</td><td>500</td></tr><tr><td> Payroll Taxes Expense</td><td>5,000</td></tr><tr><td> Salaries Expense</td><td>58,000</td></tr><tr><td> Utilities Expense</td><td>3,000</td></tr><tr><td> Miscellaneous Expense</td><td>400</td></tr><tr><td>Other Expense</td><td></td></tr><tr><td> Interest</td><td>2,500</td></tr><tr><td>Income Tax</td><td>11,500</td></tr></table>	Sales	\$325,000	Cost of Goods Sold	175,000	Operating Expenses		Advertising Expense	1,000	Delivery Expense	2,000	Office Supplies Expense	500	Payroll Taxes Expense	5,000	Salaries Expense	58,000	Utilities Expense	3,000	Miscellaneous Expense	400	Other Expense		Interest	2,500	Income Tax	11,500						
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Week 1 – Lesson 2 – Office Competencies

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
EOs	EO 1: Identify calculations and tools that can be used to solve business problems.						
Intro	In this lesson, you will practice basic office competencies. These competencies are discussed in relation to basic skills and job opportunities. In addition, you will demonstrate basic employment competencies.						
Learn: Read	Read Chapter 2: Office Competencies	21 pages	.5				EO 1
Learn: Watch	Excel Formulas and Functions (Length: 12:28) A short video on creating formulas and using functions in Excel.	12:28	.5				
Watch & Discuss: Preparing a Job Description	Word Processing Software – A Simple Explanation Video (Length: 1:48) A short video explaining what word processing software is used for. Desktop Publishing and Word Processing Video (Length: 6:02) A short video comparing word processing and desktop publishing software. Now, review the scenario and complete the discussion. SCENARIO	1:48 6:02	2	.5	2	25	EO 1

	<p>Debbie is the office manager at XYZ Company. The general manager of XYZ Company has asked Debbie to prepare a job description for the receptionist position. What type of software should Debbie use to prepare this document and why?</p> <p>Post your initial response in 250 words or more and then respond to at least 3 peers' postings in at least 100 words each.</p> <p>Online students only: Respond to the starter questions by Friday and make a follow-up post to a fellow student or your instructor by Sunday.</p>						
<p>Practice: Reinforce Math Skills</p>	<p>In this exercise, you will create a spreadsheet to compare the current department budget to a proposed budget. Read the scenario and complete the steps for this exercise.</p> <p>Employees are planning next year's budget for the Accounts Payable Department. A study was done of how the work could be improved and costs reduced. The conclusion was that the office should operate with a supervisor and only two clerks, rather than the four clerks employed in the department last year. State-of-the-art software and equipment were purchased to help two clerks do the work formerly done by four clerks.</p>			2	2	50	EO 1

	<table border="1" data-bbox="388 243 1102 462"> <thead> <tr> <th></th> <th>Last Year's Expenses</th> <th>Proposed Budget</th> </tr> </thead> <tbody> <tr> <td>Salaries</td> <td>\$133,000</td> <td>\$96,000</td> </tr> <tr> <td>Supplies</td> <td>4,000</td> <td>3,800</td> </tr> <tr> <td>Repairs and Maintenance</td> <td>5,000</td> <td>2,500</td> </tr> <tr> <td>Depreciation</td> <td>3,000</td> <td>6,000</td> </tr> <tr> <td>Telephone</td> <td>3,500</td> <td>3,900</td> </tr> </tbody> </table> <p data-bbox="388 487 798 516"><i>(Production Note: Recreate the table)</i></p> <ol data-bbox="462 527 1092 917" style="list-style-type: none"> 1. Calculate the total expenses for the department for last year. 2. Using last year's figures, calculate the percentage of total expenses each of the expense items represents. Round percentages to one decimal place. 3. Calculate the difference in total expenses between last year's figures and the proposed budget. 4. Calculate the percentage decrease in total expenses if the proposed budget is used. <p data-bbox="388 958 840 987">Submit your Excel file with the results.</p>		Last Year's Expenses	Proposed Budget	Salaries	\$133,000	\$96,000	Supplies	4,000	3,800	Repairs and Maintenance	5,000	2,500	Depreciation	3,000	6,000	Telephone	3,500	3,900						
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<p>Apply: Employment Projections</p>	<p>Instructions:</p> <ol style="list-style-type: none"> 1. Review the employment projections for major occupational groups shown in Figure 2-1 (from Text). 2. Access the website for the U.S. Bureau of Labor Statistics. Find a table that gives information similar to the one shown in Figure 2-1. (The headings may be worded differently, but you should be able to find similar information.) Save the table information in a spreadsheet file. This is typically an option on the website. If it is not an option, cut and paste the table. 		1.5	.5	2	100	EO 1																		

	<p>3. Sort the data by the % Change column from highest to lowest, leaving out the Total, all occupations row.</p> <p>4. Based on the data, make the following assessments:</p> <ul style="list-style-type: none"> • Which occupational group is projected to have the highest growth? Which one will have the lowest growth? • Look at the projected employment number for the group with the highest growth. What percentage is the number for this group of the total projected jobs number? <p>Prepare your responses to the above questions in an MS Word document, 1-inch margins, double-spaced.</p>						
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Week 2 – Lesson 3 – Information Management & Efficiency

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
CSLO and LOs	EO 2: Recognize the steps needed to solve business problems EO 3: Perform calculations using whole numbers, fractions, decimals, and percentages						
Intro	In this lesson, you will discover that as an office worker, you will deal with information daily. Understanding how it relates						

	to the total organization can help you be more productive. You will learn about common information systems. You will also learn how technology can enhance information systems.						
Learn: Read	Chapter 3: Information Management & Efficiency	27 pages	1	1			EO 2 EO 3
Learn: Watch	What is an Information System? (Length: 8:22) A short video explaining how information systems work.	8:22	1.5	.5			EO 2
Watch & Discuss: Computer Types	Watch the video that introduces types of computers, then participate in a discussion on the scenario presented below. Computer Fundamentals – Types of Computers Video (Length: 7:13) A short video describing and comparing the various types of computers. Debbie is the Office Manager at XYZ Company. Her computer has become outdated, and she is in need of a new computer. She needs to research different computers that will handle the responsibilities of her job. The list below shows what major computer tasks Debbie needs to perform: <ul style="list-style-type: none"> ● Writing letters and creating reports ● Preparing the monthly budget ● Payroll records ● Website updates ● Order system processing ● Access customer information Research various computers online and make a recommendation for Debbie to purchase. Provide rationale	7:13	2.5	.5	2	25	EO 2

	<p>for your selection and be specific. Consider factors such as computer capability and price. Post your response to this discussion in at least 250 words and respond to at least two peers' postings with at least 100 words each.</p> <p>Online students only: Respond to the starter questions by Tuesday and make a follow-up post to a fellow student or your instructor by Wednesday.</p>														
<p>Practice: Use Data to Make Decisions</p>	<p>You work for a small company that embroiders or prints names, logos, and art on various items. T-shirts, sweatshirts, uniforms, tote bags, and mugs are examples of these items. You are considering ways to improve sales by providing information to customers in better ways. Last month, which you consider a typical month, the company received orders in the following ways:</p> <table border="1" data-bbox="401 821 1071 972"> <thead> <tr> <th>Sales Channel</th> <th>Number of Orders</th> </tr> </thead> <tbody> <tr> <td>Company website</td> <td>8,640</td> </tr> <tr> <td>Telephone</td> <td>3,262</td> </tr> <tr> <td>Mail (using the company's printed catalog form)</td> <td>98</td> </tr> </tbody> </table> <p><i>(Production Note: Recreate Table)</i></p> <ol style="list-style-type: none"> 1. What percentage of the total orders was made in each sales channel? 2. The company managers are considering three options for improving the order process: <ul style="list-style-type: none"> • Making the website more informative and easier to use • Adding another associate to handle telephone orders • Improving the company's printed catalog 3. Based on the information here, which option do you think would be best? Why? 	Sales Channel	Number of Orders	Company website	8,640	Telephone	3,262	Mail (using the company's printed catalog form)	98		2	.5	2	50	EO 2
Sales Channel	Number of Orders														
Company website	8,640														
Telephone	3,262														
Mail (using the company's printed catalog form)	98														

	<p>4. In talking with the associates for telephone sales, you learn that many customers say they refer to the printed catalog when ordering by telephone. Does this information change your recommendation? Why?</p> <p>5. What other information should be considered when making this decision?</p> <p>Respond to the questions in an MS Word document and submit the Word file.</p>						
<p>Apply: Reinforce Math Skills</p>	<p>You work for an organization that gives training seminars on various topics. Recently, the company completed a series of seminars in five cities. The fee for each person at three of the seminars was \$1,000. At two of the seminars (Update on Virtual Meetings and Using Smartphones) the fee for each person was \$500. You were given the task of emailing the manager of each seminar site and getting enrollment figures for the courses. The details you recorded are shown below.</p> <ol style="list-style-type: none"> 1. Record the title of each of the five seminars on a separate line. Calculate and record the following: <ul style="list-style-type: none"> ● The total number of participants for each seminar ● The grand total number of participants for all seminars ● The total revenue earned from each seminar ● The grand total of all revenue received ● The total number of participants in each city 2. Identify the seminar with the largest total number of participants and the seminar producing the largest total revenue. 3. Compose an email message in MS Word to the managers and include the appropriate 		1.5	.5	1.5	100	EO 3

	<p>information. You may copy and paste data from other files if you like.</p> <p>Submit the MS Word file with the final email message to this assignment.</p> <p><i>(Production Note: Recreate table)</i></p> <div data-bbox="401 472 1115 776" style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <table border="1"> <thead> <tr> <th colspan="5">Participants</th> </tr> <tr> <th>Seminar and Date</th> <th>Boston</th> <th>New York</th> <th>Washington</th> <th>Chicago</th> </tr> </thead> <tbody> <tr> <td>Data Mining, January 6–10</td> <td>125</td> <td>245</td> <td>110</td> <td>117</td> </tr> <tr> <td>Managing Databases, February 15–18</td> <td>105</td> <td>325</td> <td>175</td> <td>130</td> </tr> <tr> <td>Security for the Internet, March 1–4</td> <td>78</td> <td>110</td> <td>45</td> <td>72</td> </tr> <tr> <td>Update on Virtual Meetings, March 19–22</td> <td>170</td> <td>295</td> <td>140</td> <td>110</td> </tr> <tr> <td>Using Smartphones, April 1–2</td> <td>210</td> <td>410</td> <td>175</td> <td>102</td> </tr> </tbody> </table> </div>	Participants					Seminar and Date	Boston	New York	Washington	Chicago	Data Mining, January 6–10	125	245	110	117	Managing Databases, February 15–18	105	325	175	130	Security for the Internet, March 1–4	78	110	45	72	Update on Virtual Meetings, March 19–22	170	295	140	110	Using Smartphones, April 1–2	210	410	175	102						
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Week 2 – Lesson 4 – Banking and Payroll

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
EOs	EO 4: Demonstrate the ability to solve problems involving numbers						
Intro	As an office worker, you may need to perform payroll procedures and handle employee benefits. In this lesson, you will learn about the procedures used in handling cash and banking activities.						
Learn: Read	Chapter 7: Banking and Payroll	26 pages					EO 4

<p>Learn: Watch</p>	<p>Accounting for Beginners/Bank Reconciliation Video (Length: 12:31)</p> <p>A short video explaining bank reconciliation, adjusted balance, and other accounting basics.</p>	<p>12:31</p>	<p>1.5</p>	<p>.5</p>			<p>EO 4</p>
<p>Watch & Discuss: Electronic Check Processing</p>	<p>Batch File Processing Video (Length: 5:50)</p> <p>Watch the video and participate in the discussion below.</p> <p>A short video discussing batch file virtual checks.</p> <p>Many businesses and other organizations save time and money by using electronic check processing. Rather than making deposits for checks in the traditional way, an employee uses a machine that electronically scans both sides of checks. A file is created for the batch of checks and transmitted to a check processing company. This company reviews the file. If there are any problems with the scanned file, the company will correct them or contact the depositor for additional information.</p> <p>When everything in the file appears to be in order, the check processing company transmits the file. The data travel through an electronic network for financial transactions to the appropriate banks. The amounts of the checks are deducted from the accounts of the individuals and businesses that wrote the checks. The amount of the deposit is placed in the account for the business that initiated the deposit.</p> <p>The paper checks may be stamped with a notation, such as Electronically Processed, by the check machine as they are scanned. This indicates clearly that the check has been processed for deposit. The paper checks are typically kept on</p>	<p>5:50</p>	<p>1</p>	<p>.5</p>	<p>2</p>	<p>25</p>	<p>EO 4</p>

	<p>file by the business for a few months in case any questions arise.</p> <p>How might using electronic check processing save time or money for a business?</p> <p>Post your response in at least 250 words. Respond to at least 2 peers in 100 words or more each.</p> <p>Online students only: Respond to the starter questions by Friday and make a follow-up post to a fellow student or your instructor by Sunday.</p>						
<p>Practice: Make a Deposit</p>	<p>Your tasks as an office assistant at Vine Associates include preparing bank deposits. The list of checks the company has received is shown below. These checks will be deposited in one of two banks. The checks from L. T. Mills, Olsen Corp., Yaroff Bros., Susi & Karlin, Rice Corp., Caputa & Zinn, and Prevetti Co. will be deposited at the Penn Avenue Bank; the remaining checks will be deposited at the Smithfield Bank.</p> <ol style="list-style-type: none"> 1. Open and print the file 7-1 Activity 2 (<i>Production note: link to this document</i>) from the data files. This file contains deposit slips for the two accounts. 2. Prepare a deposit slip for checks to be deposited at the Penn Avenue Bank. 3. Prepare a deposit slip for checks to be deposited at the Smithfield Bank. 4. Endorse the back of one check (shown on your data file printout) to show how you would endorse all checks for the two deposits. Use the company name in a restrictive endorsement to indicate that the checks are being submitted for deposit only. <p>Submit completed files to this assignment.</p>		2	.5	2	50	EO 4

<p>Apply: Reconcile a Cash Drawer</p>	<p>Tomasine works part-time as a cashier at a convenience store. When she went on duty and received her cash drawer, it contained \$80 in bills and coins. During her work period of three hours, sales on her register were \$194.99. She has the items listed below in her drawer at the end of her work period. Does her cash drawer balance? If not, by what amount is it over or short? Explain how you came to this conclusion in at least 250 words. <i>(Production note: Please recreate this table).</i></p> <table border="1" data-bbox="422 594 1077 816"> <tr> <td>\$1 bills</td> <td>23</td> <td>Dimes</td> <td>16</td> </tr> <tr> <td>\$5 bills</td> <td>5</td> <td>Nickels</td> <td>4</td> </tr> <tr> <td>\$10 bills</td> <td>4</td> <td>Pennies</td> <td>34</td> </tr> <tr> <td>\$20 bills</td> <td>7</td> <td>Check 238</td> <td>\$23.40</td> </tr> <tr> <td>Quarters</td> <td>15</td> <td>Check 1290</td> <td>\$18.45</td> </tr> </table> <p>Prepare your response in an MS Word file and submit the assignment.</p>	\$1 bills	23	Dimes	16	\$5 bills	5	Nickels	4	\$10 bills	4	Pennies	34	\$20 bills	7	Check 238	\$23.40	Quarters	15	Check 1290	\$18.45		.5	.5	2.5	100	EO 4
\$1 bills	23	Dimes	16																								
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\$10 bills	4	Pennies	34																								
\$20 bills	7	Check 238	\$23.40																								
Quarters	15	Check 1290	\$18.45																								

Week 3 – Lesson 5 – Financial Reports and Procedures

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
CSLO and LOs	EO 4: Demonstrate the ability to solve problems involving numbers						

Intro	<p>Business owners and managers want to make more money than is spent in operating the business. The amount of money made in a given time and other important data are shown in financial statements. Nonprofit organizations also use these statements. By the end of this lesson, you should understand the importance of financial statements to company employees, investors, and others.</p> <p>Billing customers and making payments are routine tasks for company employees. However, it is very important that these tasks be done correctly and on time. You will learn about procedures for billing customers and making payments in this chapter.</p>						
Learn: Read	Chapter 8: Financial Reports and Procedures	20 pages					EO 4
Learn: Watch	<p>The Importance and Use of Budgets Within an Organization Video (Length: 5:38)</p> <p>A short video discussing why budgeting is important within an organization.</p>	5:38	1	.5			EO 4
Watch & Discuss: Training Budget	<p>Watch the video, then review the scenario below and post to the discussion.</p> <p>How to Maximize Your Training Budget Video (Length: 36:37)</p> <p>A recorded webinar discussing how to maximize your budget for training needs.</p> <p>SCENARIO</p> <p>Johnson Company's budget included \$15,000 for staff training for the year. More training than expected was needed to train employees to use the new order entry software. By August 1,</p>	36:37	1.5	.5	2	25	EO 4

	<p>\$12,650 of the \$15,000 budgeted amount had been spent. As a result, the manager, Anna Lui, changed the procedure for approving training. She issued a memo stating that all staff training for the remainder of the year must receive her prior approval as well as the usual approval from the department head.</p> <p>Suppose you work for Johnson Company and want to attend a training seminar that is held each year in October. You know the company's training budget is often spent by August each year. What might you do in this situation?</p> <p>Post your response in at least 250 words. Respond to at least 2 peers with 100 or more words each.</p> <p>Online students only: Respond to the starter questions by Tuesday and make a follow-up post to a fellow student or your instructor by Wednesday.</p>						
<p>Practice: Projected Income Statements</p>	<p>You are an office worker for Duncan's Auto Detailing. The owner, Mr. Leon Duncan, has asked you to create two projected income statements for next year based on two different levels of potential business.</p> <ol style="list-style-type: none"> 1. Open the file 8-1 Activity 2 (<i>Production note: link to this file</i>) from the data files. This file contains last year's income statement for Duncan's Auto Detailing. 2. Make two copies of last year's income statement sheet in the workbook. Name the copies "Best Case" and "Worst Case". 3. Change the second line of the title of the Best Case and Worst Case sheets to Projected Income Statement. On the Best Case and Worst Case sheets, 		1.5	.5	1	50	EO 4

	<p>insert a row above the date and add the heading Best Case or Worst Case.</p> <p>4. Make the changes Mr. Duncan projects for the BEST CASE as listed below:</p> <ul style="list-style-type: none"> ● Sales will increase by 25 percent compared to last year. ● Detailing labor will increase by \$20,000. ● Supplies will increase by 25 percent. ● Advertising will increase by \$400. ● Payroll taxes will increase by \$1,500. ● Utilities will increase by 25 percent. ● Miscellaneous expense will stay the same. ● Income tax expense will be at the same rate as last year. To find last year's rate, divide the income tax by the net income before tax on last year's sheet. <p>5. Make the changes Mr. Duncan projects for the WORST CASE as listed below:</p> <ul style="list-style-type: none"> ● Sales will decrease by 20 percent compared to last year. ● Detailing labor will decrease by \$20,000. ● Supplies will decrease by 20 percent. ● Payroll taxes will decrease by \$1,500. ● Utilities will decrease by 20 percent. ● Miscellaneous expense will stay the same. ● Income tax expense will be at the same rate as last year. <p>6. Format the BEST CASE and WORST CASE sheets to print attractively on the page. Print copies of the sheets for the best-case and worst-case projections.</p> <p>7. What were the gross profit on sales percentages for the two alternatives? How much profit or loss after</p>						
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	<p>taxes will Mr. Duncan have under each alternative?</p> <p>In an MS Word file, respond to these questions in at least 250 words.</p>																														
Apply: Payment Discounts	<p>Invoices often show payment terms for discounts, such as 2/10, net 30. This means that the customer may take a 2 percent discount from the invoice total if payment is made within ten calendar days of the invoice date. If payment is not made by the discount date, full payment is due within 30 days of the invoice date. Terms net 30 means no discount is available, and the invoice should be paid in 30 days. Find the payment amounts due for the invoices listed below. Prepare the below data and the discount information in an MS Excel file and submit.</p> <table border="1"> <thead> <tr> <th>Invoice No.</th> <th>Amount</th> <th>Terms</th> <th>Invoice Date</th> </tr> </thead> <tbody> <tr> <td>2478</td> <td>\$5,200.20</td> <td>2/10, net 30</td> <td>February 2</td> </tr> <tr> <td>10032</td> <td>425.68</td> <td>1/10, net 30</td> <td>March 10</td> </tr> <tr> <td>9825</td> <td>985.46</td> <td>net 30</td> <td>March 15</td> </tr> <tr> <td>60532</td> <td>2,010.00</td> <td>2/10, net 30</td> <td>March 25</td> </tr> <tr> <td>298</td> <td>3,589.67</td> <td>1/10, net 30</td> <td>March 26</td> </tr> </tbody> </table>	Invoice No.	Amount	Terms	Invoice Date	2478	\$5,200.20	2/10, net 30	February 2	10032	425.68	1/10, net 30	March 10	9825	985.46	net 30	March 15	60532	2,010.00	2/10, net 30	March 25	298	3,589.67	1/10, net 30	March 26		1	.5	1	100	EO 4
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Week 3 – Lesson 6 – Ongoing Professional Development

Title	Contents	URL / ToT Rationale	Lec Hrs	Out Hrs	Fac Hrs	Points	Align
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EOs	EO 2: Recognize the steps needed to solve business problems						
Intro	<p>Professional development involves increasing skills or knowledge to succeed on the job. Developing leadership skills is an important aspect of professional development.</p> <p>Employees in many positions need leadership skills. As you study this lesson, you will learn about leadership roles, traits, styles, and strategies.</p> <p>Lifelong learning is also an important aspect of professional development. As business products, services, and procedures change, you will need to learn new skills and knowledge to be an effective employee.</p> <p>In this lesson, you will explore opportunities for ongoing learning as well as formal and informal learning environments.</p>						
Learn: Read	Chapter 14: Ongoing Professional Development	20 pages					EO 2
Learn: Watch	<p>You're Always On: Your Career Development Cycle Video (Length: 13:35)</p> <p>A brief video discussing the importance of professional development in the workplace.</p>	13:35	1				
Watch & Discuss: Leadership Skills	<p>How to Be a Leader – The 7 Great Leadership Traits Video (Length: 7:20)</p> <p>A short video describing leadership traits and their styles.</p>	7:20	1.5	.5	1.5	25	EO 2

	<p>Respond to the below discussion question. Be sure your original posting is 250 or more words and you respond to at least 2 peers' postings in at least 100 words each.</p> <p>What are some positions in a company where the employee needs leadership skills? Be sure to describe the position and the types of leadership skills needed and why.</p> <p>Online students only: Respond to the starter questions by Friday and make a follow-up post to a fellow student or your instructor by Sunday.</p>						
<p>Practice: Reinforce Math Skills</p>	<ol style="list-style-type: none"> 1. A survey was conducted in a company with 200 employees. Each employee was given descriptions of three leadership styles: autocratic, democratic, and delegative. Each employee was asked to identify the leadership style that most closely matches the one used by her or his manager. Autocratic leadership style was selected by 20 employees. Delegative leadership style was selected by 5 percent of the employees. What percentage of the employees selected democratic leadership style? 2. When the employee survey (from question 1) was repeated six months later, 150 employees selected democratic leadership style. What is the increase or decrease in the number of people who selected this leadership style? What percent of increase or decrease does this change represent? 3. Employees were asked to rate the effectiveness of their managers on a scale of 1–5. The number of responses for each rating score is shown below. What percentage of the total responses did each rating score receive? 		2.5	.5	1	50	EO 2

	<p><i>(Production note: Recreate this file).</i></p> <table border="1" data-bbox="405 318 978 829"> <thead> <tr> <th>Rating Score</th> <th>Number Of Employees</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>14</td> </tr> <tr> <td>2</td> <td>10</td> </tr> <tr> <td>3</td> <td>66</td> </tr> <tr> <td>4</td> <td>94</td> </tr> <tr> <td>5</td> <td>16</td> </tr> </tbody> </table> <p>Using the software tools necessary, prepare a response showing your work in an MS Word file and submit that file to this assignment.</p>	Rating Score	Number Of Employees	1	14	2	10	3	66	4	94	5	16						
Rating Score	Number Of Employees																		
1	14																		
2	10																		
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<p>Apply: Leadership Styles</p>	<p>You have learned about three basic leadership styles: autocratic, democratic, and delegative.</p> <p>Read the leadership style descriptions listed below. For each one, tell which leadership style is being described. Some may apply to more than one style.</p> <ol style="list-style-type: none"> Both the leader and the followers take part in the decision-making process. The leader tells the followers what needs to be accomplished and provides the resources needed. 		1	.5	1.5	50	EO 2												

	<ol style="list-style-type: none"> 3. All decisions are made by the leader. 4. The leader has the final say in decisions but listens to input from followers. 5. Followers make the decisions about how to accomplish goals. 6. Followers have little or no influence in the decision process. 7. Works best when followers have expert skill and knowledge and are good at setting and meeting deadlines. 8. Works best when the leader and the other employees have the knowledge or skills needed to make decisions. 9. Works best when the leader has the expert knowledge or skills needed to make decisions and the followers do not. 10. Works best when there is enough time to request and consider input from followers. <p>Prepare your responses to each item in an MS Word file and submit the MS Word file to this assignment.</p>						
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End of Class Activities

Title	Contents
Course Survey	Thank you for taking time to provide information regarding your online course. The information collected here will be used to evaluate course design, textbook selection, resources/training, and instructor performance. This survey is anonymous and your answers will not be visible to your instructor until after grades are posted for the term.

Total Hours

(To update totals, select the table and then select Function-F9 (Mac) or F9 (PC). Only works in desktop version of Word.)

9	Lec Hrs	Out Hrs	Total Contact Hrs	Fac Hrs	Points
Week 1 Lesson 1	6	1	7	6	175
Week 1 Lesson 2	4.5	3	7.5	6	175
Week 2 Lesson 1	8.5	3	11.5	5.5	175
Week 2 Lesson 2	5	2	7	6.5	175
Week 3 Lesson 1	5	2	7	4	175
Week 3 Lesson 2	6	1.5	7.5	4	125
Course Totals	35	12.5	47.5	32	1000

Minimum TOT Requirement	Student Hours	Outside Hours	Total Contact Hours	Faculty Hours
Per credit hour	10 hours	2.5 hours	12.5 hours	NA

Credit hours in this course:	4	40 hours	10 hours	50 hours	30 hours
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