

SAM Office 2019 Project Notes for Windows and MacOS

While most students will complete their SAM Projects using Office 2019 or 365 for Windows, we continue to make our SAM Office 2019 Projects as accessible to Mac users as possible. As of December 2019, SAM 2019 offers the following classifications of Projects:

- ▣ Not Mac-Compatible – These Projects cannot be completed on a Mac.
 - Note that all SAM Access Projects fall into this category, because Microsoft Access software is not available for the Mac OS.
 - Some textbook Projects cannot be fully completed on a Mac. Cengage textbooks are written to teach Office for Windows, which remains the most full-featured and most popular application in business today. If you only have a Mac, use the VDI network on campus to do assignments not Mac-compatible.
- ▣ Mac-Compatible - Most SAM Projects fully support PC and MAC users by default.
- ▣ Mac Version Available –PC and Mac versions of some Projects are available. In these cases, instructor will edit the Project assignment options to enable OS detection for students completing the Projects on a Mac. The default option is PC only. Please refer to MAC Project differences below to learn more about these projects.

The documentation that follows describes the differences that instructors and students will encounter with OS detection enabled for Projects with a Mac Version Available.

To view the complete status of all Projects (Not Mac-Compatible, Mac-Compatible, or Mac Version Available), or to view known issues or other information, please refer to the Project and Task Information link on the SAM homepage.

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Shelly Cashman Excel 2019 – Notes for Modules 4-7 for Excel 1 and for CIS 111:

Shelly Cashman Excel 2019 | Module 4: SAM Project 1b

Step	Windows	MacOS	Notes
1b	For cell B7, edit the defined name to use Loan_Amt as the name. [Mac Hint: Delete the existing defined name "Loan_Am" and add the new defined name.]	Mac hint added	Delete the defined name first and then add the new defined name.

Shelly Cashman Excel 2019 | Module 4: End of Module Project 2

Step	Windows	MacOS	Notes
5	The cells in the range D3:D14 have defined names, but one could be clearer, another is unnecessary, and one is missing. Delete the Monthly_Contribution (cell D10) defined name because it will not be used in a calculation. [Mac Hint: Delete the existing defined name "Match" and add the new defined name.] Edit the name assigned to cell D6 to use Employer_Match as the defined name, which clarifies the contents of the cell. Use Future_Value as the name assigned to cell D14 so you can use the name in formulas.	Mac hint added	When the student edits the existing defined name in Mac, a new defined name appears but the old one must be manually removed.

10	Based on the range F3:N23, create a two-variable data table that uses the annual rate of return (cell D8) as the row input cell and the employee percent invested (cell D5) as the column input cell. [Mac Hint: To see the data properly, use AutoFit to change the column width of columns G through N.]	Mac hint added	The student is unable to see the data in the cells.
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Shelly Cashman Excel 2019 | Module 5: End of Module Project 2

Step	Windows	MacOS	Notes
4	In the range A13:E16, Malai wants to include data about the types of posts the company makes on their website and social media webpages. This data is stored in a text file. Import the CSV file Support_EX19_EOM5-2_Posts.csv as a table starting in cell A13 of the existing worksheet. [Mac Hint: Use column delimation while importing the .csv file.]	Mac hint added	The student must set the Comma delimiters option in the Text Import Wizard.

Shelly Cashman Excel 2019 | Module 7: SAM Project 1a

Step	Windows	MacOS	Notes
1a	Apply the Turquoise, Accent Color 1, Shadow WordArt Style to the title.	Apply the Fill: Turquoise, Accent Color 1; Shadow WordArt Style to the title.	The color name differs in Mac.

2a, b	<p>a. Open the webpage Support_EX19_7a_Team.html in a browser.</p> <p>b. In the Asset Management worksheet, import the data from the Support_EX19_Team. In cell B29, use the Quick Analysis tools to insert the total investment amount from the range B21:B28, which should match the total in cell D28.</p> <p>c. webpage in cell G12.</p>	<p>a. From the Data tab, use the 'From HTML' tool to open the webpage Support_EX19_7a_Mac_Team.html as a table in a new workbook.</p> <p>b. Copy the table, with the column headers included, from the new worksheet. In the Asset Management worksheet, paste the table in cell G12. Close the new worksheet without saving.</p>	<p>The instructions were reworded because the process to import the data is different in Mac.</p>
14a	<p>a. Use the Quick Analysis tool to create a conditional formatting rule that adds Solid Fill Blue Data Bars to the range F21:F28 to help clients visualize the data.</p>	<p>a. In cell B29, use the Sum function to insert the total investment amount from the range B21:B28, which should match the total in cell D28.</p> <p>b. Create a conditional formatting rule using the Solid Fill Blue Data Bar option to the range F21:F28 to help clients visualize the data.</p>	<p>The instructions were reworded because the Quick Analysis tool is not available in Mac.</p>
16a	<p>In cell E30, insert a Callout: Line shape from the Callouts section of the Shapes gallery.</p>	<p>In cell E30, insert a Line Callout 1 shape from the Callouts section of the Shapes gallery.</p>	<p>The shape name differs in Mac.</p>

Shelly Cashman Excel 2019 | Module 7: SAM Project 1b

Step	Windows	MacOS	Notes
2a	In the Reunion Organizers worksheet, get data from the Support_EX19_7b_Committees.html webpage. (Hint: Use Windows Explorer to navigate to the Support_EX19_7b_Committees.html webpage, click in the Address bar, and then copy the path. In the From Web dialog box, paste the path in the URL box.) Import only the 2022 Reunion Committee Members webpage data as a table to cell G12 in the existing worksheet.	<p>a. From the Data tab, use 'From HTML' to open the Support_EX19_7b_Mac_Committees.html webpage as a table in a new workbook.</p> <p>b. Copy the table, with column headers included, from the new workbook. In the Reunion Organizers worksheet, paste the table in cell G12. Close the new workbook without saving.</p>	The instructions were reworded because the process to import the data is different in Mac.

14a, b	<p>a. In cell D27, use the Quick Analysis tools to insert the total number of registrations to date from the range D19:D26. (Hint: Ignore the errors if any appear.)</p> <p>b. Use the Quick Analysis tool to create a Conditional Formatting rule that adds Solid Fill Blue Data Bars to the range F19:F26 to help Clare visualize the data.</p>	<p>a. In cell D27, use the Sum function to enter the total number of registrations to date from the range D19:D26. (Hint: Ignore the errors if any appear.)</p> <p>b. Create a Conditional Formatting rule that adds Solid Fill Blue Data Bar to the range F19:F26 to help Clare visualize the data.</p>	The instructions were reworded because the Quick Analysis tool is not available in Mac.
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16a	In cell B28, insert a Callout: Line shape from the Callouts section of the Shapes gallery.	In cell B28, insert a Line Callout 1 shape from the Callouts section of the Shapes gallery.	The shape name differs in Mac.
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Shelly Cashman Excel 2019 | Module 7: End of Module Project 1

Step	Windows	MacOS	Notes
2	Abdul needs to import data from the New York, Chicago, and Los Angeles offices. The New York office provided its monthly data in a text file. Import the data from the file Support_EX19_EOM7-1_NewYork.csv as a table in the Advertising worksheet beginning in cell A10.	Not Mac compatible	The Power Query is not compatible with Mac.
3	The Chicago office provided its monthly data as an Access database file. Select the Chicago table in Support_EX19_EOM7-1_Chicago.accdb for importing. Use the Power Query Editor to transform the data by removing the first column, and then load the data as a table in the Advertising worksheet beginning in cell A16.	Not Mac compatible	The Power Query is not compatible with Mac.
4	The Los Angeles office provided its monthly data as a webpage file. Import the data from the file Support_EX19_EOM7-1_LosAngeles.html, specifying a path such as c:\users\username\documents\projects\Support_EX19_EOM7-1_LosAngeles.html. Select the Wang Marketing: Los Angeles Office data. Use the Power Query Editor to transform the data by removing the first column, and then load the data as a table in the Advertising worksheet beginning in cell A22.	Not Mac compatible	The Power Query is not compatible with Mac.

Shelly Cashman Excel 2019 | Module 7: End of Module Project 2

Step	Windows	MacOS	Notes
3	The worksheet should list information about the department members, which is contained in a webpage. Get data from the Support_EX19_EOM7-2_Department.html webpage. (Hint: Use Windows Explorer to navigate to the Support_EX19_EOM7-2_Department.html webpage, click in the Address bar, and then copy the path. In the From Web dialog box, paste the path in the URL box.) Import only the Web Development Department Members webpage data as a table to cell G11 in the existing worksheet.	Not Mac compatible	Data cannot be imported in Mac.
10	Resize columns A:E to their best fit, resize column G to 18.25, and resize column H to 13.00. Hide rows 11 to 17 so that the worksheet does not display duplicated data.	Not Mac compatible	Only the width of 18 or 18.33 (instead of 18.25) can be applied in Mac.
16	Go to the Resources worksheet, which Ruben asks you to finish. In cell D12, use the Quick Analysis tools to insert the total number of resources from the range D4:D11. (Hint: Ignore the errors if any appear.)	Not Mac compatible	The Quick Analysis tool is not available in Mac.

Shelly Cashman Excel 2019 | Modules 4-7: SAM Capstone Project 1a

Step	Windows	MacOS	Notes
10a	Use the Quick Analysis tool to create a Stacked Column chart that compares the revenue from each type of media for Quarters 1–4 (range A5:E11). [MAC HINT: Select Stacked Column chart from Recommended Charts under the Insert tab.]	Mac hint added	The Quick Analysis tool is not available in Mac.

12c,d, e	<p>a. In the Power Query Editor window, choose to close and load to a location in the worksheet. [MAC Hint: Use Text Import Wizard to import data as tab delimited text.]</p> <p>b. View the imported data as a table and insert the data in cell H5 of the existing worksheet. [MAC Hint: Import data as text and update the table name from "Table_2" to "Support_EX19_CS4_7a_Media".]</p> <p>c. Apply Blue, Table Style Medium 2 to the imported table to coordinate with the rest of the worksheet contents. [MAC Hint: Format as Table using Blue, Table Style Medium 2.]</p>	Mac hint added	The Power Query Editor window does not appear in Mac.
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Notes for Excel 2, Modules 8-10:

Shelly Cashman Excel 2019 | Module 8: SAM Project 1a

Step	Windows	MacOS	Notes
4a	Insert the Sum of Payment by State recommended PivotTable. [Mac Hint: Use the State field in the Rows area, the Payments field in the Values area, and show grand totals for rows and columns.]	Mac hint added	Fields need to be added manually in Mac.

Shelly Cashman Excel 2019 | Module 8: SAM Project 1b

Step	Windows	MacOS	Notes
4a	Insert the Sum of Billed by Location recommended PivotTable. [Mac Hint: Use the Location field in the Rows area and the Billed field in the Values area. Be sure to uncheck the Buyer ID and Item ID check boxes to deselect and remove them from the PivotTable, and drag the Location Field from the Columns area to the Rows area.]	Mac hint added	When the student adds the recommended PivotTable, "Item ID" and "Sum of Buyer ID" also display in the field list.
5a,b,c	<p>a. Insert a Combo PivotChart based on the Billed by Location PivotTable. [Mac Hint: Insert a Clustered Column Chart.]</p> <p>b. Display the Total Billed as a Clustered Column chart and the Average Billed as a Line chart. [Mac Hint: Select the "Average Billed" data series, select Change Chart Type on the Design tab, point to Combo, and then select Clustered Column - Line.]</p> <p>c. Include a secondary axis for the Average Billed data. [Mac Hint: Select the "Average Billed" data series/line, control+click the series/line, select Format Data Point, and then select the Secondary Axis radio button.]</p>	Mac hint added	Options are not available to perform Steps 5(a), 5(b), and 5(c) in Mac.

Shelly Cashman Excel 2019 | Module 8: End of Module Project 1

4	Sonia also wants to display the revenue by branch data as a chart. Insert a Combo PivotChart based on the new PivotTable. Display the 2020 Revenue and the 2021 Revenue data as a Clustered Column chart and the Average 2020-2021 data as a Line chart. Include a secondary axis for the Average 2020-2021 data.	Not Mac compatible	The Sum of Revenue 2021 by Branch (+) recommended PivotTable is not available in Mac.
5	Display the legend at the bottom of the chart, and then hide the Field List and all the field buttons to remove clutter from the worksheet. Change the maximum bounds for the value axis on the left to 9,000,000. Change the PivotChart colors to Monochromatic Palette 4. Resize and position the PivotChart so that it covers the range A9:D24.	Not Mac compatible	The Sum of Revenue 2021 by Branch (+) recommended PivotTable is not available in Mac.
6	Add a slicer based on the Policy Type field, and then apply the Coral, Slicer Style Light 4. Display the slicer buttons in two columns, and then move and resize the slicer so that the upper-left corner is in cell E3 and the lower-right corner is in cell G8. Use the slicer to filter the PivotTable and PivotChart to display Auto, Home, and Life policies.	Not Mac compatible	The Sum of Revenue 2021 by Branch (+) recommended PivotTable is not available in Mac.

10	Insert a PivotTable and PivotChart on a new worksheet, using Average Revenue as the worksheet name. Make sure the 'Add this data to the Data Model' checkbox is unchecked. With the blank PivotChart selected, add the Years Experience field to the Axis (Categories) area, Revenue 2020 as the first Values field, and Revenue 2021 as the second Values field. Change the value field settings of both value fields to display averages, using the Currency number format with 2 decimal places and the \$ symbol. Change the PivotChart layout to Layout 3, and use Revenue by Years of Experience as the chart title. Move and resize the PivotChart so that its upper-left corner is in cell A9 and its lower-right corner is in cell C24.	Not Mac compatible	The PivotTable and PivotChart options are not available in Mac.
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Shelly Cashman Excel 2019 | Module 10: SAM Project 1a

Step	Windows	MacOS	Notes
8g, h	New step added to Mac project	Remove all subtotals from the PivotTable. Format the Sum of ContractAmt field using the Currency number format with 2 decimal places and the \$ symbol.	The instruction to remove subtotals was added. A step was added because the number format needs to be changed in Mac.
9h	New step added to Mac project	h. Format the Sum of InvoiceAmt field using the Currency number format with 2 decimal places and the \$ symbol.	Step 9(h) was added because the number format needs to be changed in Mac.

10	<p>To properly combine data from the Customer, Contract, and Invoice tables, create relationships between tables as follows:</p> <p>a. In the Power Pivot for Excel window, create a relationship between the Customer and Contract tables using the CustomerID column to relate the tables.</p> <p>b. Create a relationship between the Contract and Invoice tables using the ContractNum column to relate the tables.</p>	Step removed.	Power Pivot is not available in Mac.
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Shelly Cashman Excel 2019 | Module 10: SAM Project 1b

Step	Windows	MacOS	Notes
8g	New step added to Mac project	Remove all subtotals	Step 8(g) was added to remove all subtotals.
10	<p>To properly combine data from the Client, Project, and Invoice tables, create relationships between tables as follows:</p> <p>a. In the Power Pivot for Excel window, create a relationship between the Client and Project tables using the ClientID column to relate the tables.</p> <p>b. Create a relationship between the Project and Invoice tables using the ProjectNum column to relate the tables.</p>	Step removed	Power Pivot is not available in Mac.

Shelly Cashman Excel 2019 | Module 10: End of Module Project 1

Step	Windows	MacOS	Notes
1	Go to the Education and Age worksheet, where Pedro wants to include educational information about Wyoming counties. He has another workbook that already contains this data. Use Power Query to connect to and import data from the Support_EX19_EOM10-1_Education.xlsx workbook. Transform the data in the Education table to remove the top two rows and the column containing state data. Use the first row as headers. Close and load the transformed data to a table in cell A2 of the existing worksheet.	Not mac compatible	The Power Query feature is not available in Mac.

Shelly Cashman Excel 2019 | Module 10: End of Module Project 2

Step	Windows	MacOS	Notes
1	Customize the theme fonts to use Arial as the heading font and Calisto MT as the body font. Customize the theme colors to use Dark Purple, Background 2 as the hyperlink color. Save the new settings as a custom theme, using Menlo as the theme name.	Not mac compatible	The Customize Fonts and Customize Color options are not available in Mac.

Shelly Cashman Excel 2019 | Module 11: SAM Project 1a

Step	Windows	MacOS	Notes
3	<p>Lydia wants to customize the appearance of this workbook by changing a theme color and theme font. She also wants all new workbooks in the Sales and Marketing Department to reflect these changes. Create a custom theme as follows:</p> <ol style="list-style-type: none"> Create a custom color scheme named eMD that uses Blue- Gray, Accent 2, Darker 50% as the Text/Background—Dark 2 color. Create a custom font set name eMD that uses Century Schoolbook as the Heading font and Calibri Light as the Body font. Save the new settings as a custom theme using eMD as the name of the new theme. 	Step removed.	The Customize Fonts and Customize Color options are not available in Mac.
5/4	Use the Quick Analysis tool to add Line sparklines to the range G4:G8 to chart the Q1–Q4 values and totals (range C4:F8) for each type of product or service. (Hint: Select the Q1–Q4 values and totals first.)	Add Line sparklines to the range G4:G8 to chart the Q1–Q4 values and totals (range C4:F8) for each type of product or service. (Hint: Select the Q1–Q4 values and totals first.)	The instructions were reworded because the Quick Analysis tool is not available in Mac.

15	<p>Lydia is planning to send the workbook to the eMD sales representatives. Because not all of them have the latest version of Excel, she asks you to check the compatibility of the workbook.</p> <p>a. Check the compatibility of the workbook.</p> <p>b. Copy the Compatibility Report to a new worksheet.</p>	Step removed.	The Check compatibility feature is not available in Mac.
16b/14b	Mark the workbook as final.	Change the workbook settings to always open read-only.	The option to mark the workbook as final is not available in Mac.

Shelly Cashman Excel 2019 | Module 11: SAM Project 1b

Step	Windows	MacOS	Notes
3	<p>Kenny wants to customize the appearance of this workbook by changing a theme color and theme font. He also wants all new Task Team workbooks to reflect these changes. Create a custom theme as follows:</p> <p>a. Create a custom color scheme named TaskTeam that uses Light Green in the Standard Colors palette as the Followed Hyperlink color. b. Create a custom font set name TaskTeam that uses Rockwell (not Rockwell Condensed) as the Heading font and Rockwell as the Body font.</p>	Step removed	The Customize Fonts and Customize Color options are not available in Mac.

5/4	Use the Quick Analysis tool to add Line sparklines to the range F3:F7 to chart the Year 1 to Year 4 values and totals (range B3:E7) for each category of service. (Hint: Select the Year 1 to Year 4 values and totals first.)	Add Line sparklines to the range F3:F7 to chart the Year 1 to Year 4 values and totals (range B3:E7) for each category of service. (Hint: Select the Year 1 to Year 4 values and totals first.)	The instructions were reworded because the Quick Analysis tool is not available in Mac.
15	Kenny is planning to send the workbook to Task Team service representatives. Because not all of them have the latest version of Excel, he asks you to check the compatibility of the workbook. a. Check the compatibility of the workbook. b. Copy the Compatibility Report to a new worksheet.	Step removed	The Check Compatibility feature is not available in Mac.
16b/ 14b	Mark the workbook as final.	Change the workbook settings to always open read-only.	The option to mark the workbook as final is not available in Mac.

Shelly Cashman Excel 2019 | Modules 8-11: SAM Capstone Project 1a

Step	Windows	MacOS	Notes
15	<p>Insert a recommended PivotTable based on the Orders table as follows:</p> <ol style="list-style-type: none"> Insert the Sum of Payment by Region recommended PivotTable. Use May Sales by Region as the name of the new worksheet. 	<p>Create a new PivotTable based on the Orders table as follows:</p> <ol style="list-style-type: none"> Insert a PivotTable on a new worksheet using May Sales by Region as the name of the new worksheet. Display the Region field as row headings. Display the Payment field as the values. 	<p>Step 15 was reworded because a recommended PivotTable is not available in Mac.</p>

22	<p>Eva also wants to create a PivotTable that includes data about sales representatives and their sales. She already added the tables containing this data to the Data Model. Eva wants to list each sales rep by name along with their region, number of products sold, and total amount of sales. Create a PivotTable that displays this information as follows:</p> <ol style="list-style-type: none"> Use Power Pivot to create a PivotTable on a new worksheet, using Sales Reps as the name of the worksheet. Display the LastName field values from the Query – SalesReps data source as row headings. Display the Region field values from the Query – SalesReps data source as column headings. Add the TotalSales field from the Query - Sales data source to the Values area to sum the field values. 	Step removed	Power Pivot is not available in Mac.
23	<p>To properly combine data from the Sales and SalesReps tables, use the Power Pivot for Excel window to create a relationship between the Sales and SalesReps tables using the SalesRepID column to relate the tables.</p>	Step removed	Power Pivot is not available in Mac.