

# Excel Audit Sheet Guide

Formatting conventions and functionality of the audit worksheets are outlined below. The audits are designed for use with Excel 2007 or later and may not function properly with earlier versions of Excel. There are also known incompatibilities with the Apple version of Excel.

Most of the functionality is macro-based. This means that when you open the file you may be asked if you want to enable macros (this will depend on your security setting). You must enable macros to use these audit sheets. You can avoid this security check by placing the audit template as well as any saved audits in the same folder (subfolders are allowed) and then identifying that folder to Excel as a 'trusted location'.

## Formatting/Layout

- **Grey Font** – course for which prerequisites have not yet been completed
- **Blue Font** – courses for which all prerequisites have been completed (this assumes that prerequisite course in which the student is currently enrolled will be passed)
- **Green Font (Select...)** – unspecified designated elective. Once a course has been specified, formatting will reflect the appropriate status. These courses are also indicated by a dashed border which will remain even after a specific course has been selected.
- **Cyan Fill** – currently enrolled course
- **Black Font** – satisfactorily completed course
- **Red Fill** or **Font** – reserved for items of concern (e.g. "F" or "I" grade, low GPA, unsatisfied requirement etc.)

## Functionality

1. The Biology, Conservation Biology, and Fisheries & Wildlife audits include all concentrations in a single workbook. Select the desired concentration using the buttons to the right of the main audit form.
2. If you place a picture (\*.jpg) of the student (e.g. ID photo from Anchor Access) in the same folder as the audit, with a file name matching what you enter for 'Name' (w/o punctuation or spaces), the photo will be added as a comment to the ID cell when you enter the student's name. For Example:

Name entered on audit sheet: Smith, John  
Name for picture file: SmithJohn.jpg

If a file with this name is not found, you will be asked if you wish to browse for a picture file. If you do not want to add the student's picture to the audit just click 'No'.

3. Select the appropriate placement exam or transfer student status and provide the English and Math scores. These scores are used to determine which courses the student is initially qualified to enroll for.
4. Approved 'designated elective' courses are available via dropdown lists. If more than one designated elective course is required (i.e. two Social Science electives), courses already selected are removed from the list. Once a course has been selected from the list, the corresponding prerequisites will be displayed in the cell comment. If a course with variable credits (e.g. Special Topics, Internship) is selected, you will be prompted to supply the number of credits to be assigned.
5. A double click in the 'Sem' column enters the next semester into the cell. For example if you double click in a cell within the 'Sem' column in the Fall of 2013, then 14S (for Spring of 2014) will be entered. You can step forward or backward through semesters with Ctrl → or Ctrl ←. Note that moving forward skips summer sessions while moving back includes summer. You may, of course simply type the semester into the cell but you must enter it as a 2-digit year followed by 'F', 'S', or 'U'.

6. Grades may be typed into cells within the 'Grade' column or selected from the dropdown list. In addition to the standard letter grades (with '+' or '-' as necessary) acceptable inputs include 'T' (transfer), 'I' (incomplete), 'CR' (credit), and 'NC' (no credit).
7. If a name has been entered in the current audit sheet, selecting a different concentration will transfer all current information *e.g.* Name, ID, Placement Scores and information from completed, or enrolled courses, to the new audit. Depending on how many courses need to be transferred, this process may take several seconds to complete. Note that only courses for which the 'Sem' information has been entered will be transferred to the new audit sheet.
8. Refresh. If at any time it appears that the GPA calculations, formatting or prerequisite information has not updated correctly – try this button. You never know it might work!
9. Degree requirement checks – monitor the status of additional degree requirements (*e.g.* # of required 300 & 400 level credits, # of non-biology free electives). These indicators will show an 'x' if the requirement is not met or a '✓' if the requirement has been met.
10. 'Save Audit' saves the file using the student's name as entered in 'Name' (w/o punctuation or spaces). You may of course use Excel's normal Save or Save As options to save the file with a different name.

