

Acct 522- Data Analytics Tools for Accountants Syllabus

(Taught as MGMT 522 in existing MS in Accounting Program;
this new course is adapted to be more accounting specific)

Class Time

Professor

Email

Office Hours

Textbook Excel for Accountants by Labyrinth Learning with eLab access

Prerequisites Admission in the graduate program

Course Description

Big data is everywhere, and accounting is no exception. This course is designed to give students an intermediate understanding of how accountants and auditors can transform big (and small) data into useful information and how to best communicate the results to other parties. Students will use a variety of software programs to assess, analyze and present financial data in a meaningful and impactful way. Credits 3(3-0)

School of Business Mission

Students acquire strong quantitative, analytical, and communication skills while preparing for professional success as socially responsible individuals in today's complex business environment. We strive for teaching excellence and recognize that high-quality faculty scholarship and professional activities advance the impact we have on practice, pedagogy, and our knowledge of business.

Masters of Science in Accounting Program Competency Goals

Competency Goal 1. Learners will develop the analytical skills necessary for entry and advancement in the public accounting profession

Competency Goal 2. Learners will develop the research skills necessary for entry and advancement in the public accounting profession

Competency Goal 3. Learners will be able to communicate effectively both orally and in writing

Competency Goal 4. Learners will possess the knowledge and skills necessary to succeed in the public accounting profession

Competency Goal 5: Our learners will have a multidimensional understanding of social responsibility.

Students will develop data analysis and software skills necessary to succeed in the accounting profession. This includes Microsoft Excel, Alteryx, Power BI, IDEA and Tableau. The Competency Goals (CG) for this course are that all students will be able to:

- **Analyze and communicate key information through charts and tables (CG 1,3 & 4)**

- **Develop knowledge needed to effectively analyze data (CG 1)**
- **Acquire software skills needed to succeed in accounting position (CG 4)**
- **Research and prepare a presentation based a computer program used in the field of accounting (CG 3 &4)**

Software

In this course, we will be using several software programs including Blue Prism, Tableau, IDEA, Excel, Alteryx and Power BI. All of these programs are available on the trading room computers. These programs are available to be downloaded on students' personal computers free of charge. Information on how to access each of these programs is available on Canvas. Please note that Alteryx and Power BI do not play nicely with Macs.

In Class/Weekly Assignments

In each class, an assignment will be assigned that pertains to the program we are working on. Weekly assignments are designed to be worked on in class and if not completed by the end of the class period then completed as homework. Each weekly assignment will be due before the next class. Please pay close attention to the deliverables for each assignment to make sure you print or include all necessary documents. It is your responsibility to make sure all assignments are completed and turned in on time. I do not accept late assignments. If you are going to miss class, you are responsible for the content and assignments discussed in class. Please stay in contact with me if any situations arise that make it difficult for you to attend class or complete assignments on time.

Exams

There will be one required exam for this course. It is the Alteryx certification exam. This exam is administered by Alteryx and is open book and open notes. The exam is 80 questions, and you have two hours to complete it. If you do not pass the exam the first time you need to wait a week and you can take it again. I will take the highest score of any attempts you complete. I would like you to attempt the exam at least twice. There is no charge for this certification. There is also the opportunity to take an optional Tableau certification exam. This has a cost of \$100.

Homework Assignments

This course has been split into four parts; RPA, Alteryx, Data Viz (Tableau and Power BI) and CaseWare IDEA. Each week you have video lessons and/or exercises assigned that will teach you about the corresponding software we are working on that week. Please make sure you complete all of these assignments on time. We will be building on what you learned in the videos in our in-class assignments. I do not accept late assignments so please plan accordingly.

Research project/ presentation

Students will be formed into groups with each group begin assigned a software program or topic to research and present to the class. Each program or topic is being used in some capacity in the field of accounting or auditing. Each group is expected to present the background and history of each program as well as how it is currently being used in the profession and its possibilities for future uses. When possible include examples of the actual program(s). Specific assignment details will be provided. See assignments schedule for due dates.

Overall Course Grading

Homework Assignments	30%
Alteryx Exam	20%
In Class Assignments	30%
Final Research Paper/Presentation	<u>20%</u>
Total	100%

A regular **grading scale** will be applied (93 and above A, 90- 92 A-, 88- 90 B+ etc....) to your grade. I round to the nearest whole grade. For example, 89.5 rounds to an A- and 89.4 is a B+. I do not assign or award extra credit. Please do not ask.

Course Values

The course is conducted based on the following values. All participants are expected to adhere to these principles.

- **Respect:** All class members will be treated with respect by me and other class members. This includes showing respect whenever an individual is speaking or making a presentation in class.
- **Equity:** All students will be treated equitably during class and in the determination of their grades. Wherever appropriate, I will grade student submissions anonymously.
- **Transparency:** All students have a right to know how their performance is evaluated. Students will have access to their class averages any time after the third week of the semester.
- **Access:** All students will have access to me during office hours or at a mutually convenient time to the student and me. In the event I have to cancel office hours, I will announce it in class or place a note on my door explaining how you may contact me.
- **Professionalism and Classroom Etiquette:** In the professional world, you will create an impression not only by what you know but also by how you conduct yourself. During class, please plan to arrive on time, turn off cell phones and computers before class begins and treat your colleagues and their opinions with respect. I reserve the right to deduct up to 40 points from your final average for unprofessional behavior based on my perception such as cell phones calls, texting, chronic late arrivals, using computers for activities not related to class, lack of respect for colleagues, signing in students who are not present in the class, etc. The deduction will be made against your total points for the course.
- **Relevant Intellectual Rigor:** The material will be challenging, but relevant. The course is designed to maximize learning and satisfaction. With your cooperation, you should learn a great deal and enjoy doing it. If I do my job well, this course will be challenging enjoyable, and thought provoking. In short, the course is designed to be simultaneously loose and tight; a cooperative and relaxed atmosphere in which demanding and critical analysis is undertaken.

Students with Disabilities

SUNY Geneseo is dedicated to providing an equitable and inclusive educational experience for all students. The Office of Accessibility will coordinate reasonable accommodations for persons with physical, emotional, or cognitive disabilities to ensure equal access to academic programs, activities, and services at Geneseo. Students with letters of accommodation should submit a letter to each faculty member and discuss their needs at the beginning of each semester. Please contact the Office of Accessibility Services for questions related to access and accommodations.

Office of Accessibility Services
Erwin Hall 22
(585) 245-5112
access@geneseo.edu
www.geneseo.edu/accessibility-office

School of Business Support

If you have any needs or need assistance in areas such as financial, need access to food or personal hygiene items or have been faced with a bullying or discriminating practice or person, or any other needs please see Liz Felski. She is the school of business student advocate and is happy to help in any situation of need. You may stop and see her in South 303 or email her at felski@geneseo.edu. Additionally, the college provides many useful resources for students. Please visit the link below for more information about the services offered. <https://wiki.geneseo.edu/display/PROVOST/Syllabus+Resources+Related+to+Student+Success>

ACCT 522
Tentative Course Schedule

Date	Topic	Homework
Week 1	Data Visualization - Tableau	
Week 2	Data Visualization - Tableau	Excel 1 & 2
Week 2	Data Visualization - Tableau	Excel 3
Week 3	Data Visualization - Tableau	Excel 4
Week 3	Data Visualization - Tableau	Excel 5
Week 4	Data Visualization- PowerBI	Excel 6
Week 4	Data Visualization- PowerBI	Excel 7
Week 5	Data Visualization- PowerBI	Excel 8
Week 5	Data Visualization- PowerBI	Excel 9
Week 6	Alteryx	Excel 10
Week 6	Alteryx	Module 1
Week 7	Alteryx	Module 2
Week 8	Alteryx	Module 3
Week 9	Alteryx	Module 4
Week 10	RPA	
Week 11	RPA	Introduction to BluePri
Week 12	Teammate	Process Studio
Week 13	IDEA	
Week 14	IDEA	Business Objects
Week 15	IDEA	Exception Handling & Exception I
Week 15	IDEA	
Week 16	Project Presentations	Work Queues
Week 16	Project Presentations	Additional Features
	Final Exam	