



**ACCT 5124 A & B**  
**Data Analytics for Professional Accountants**

**Course Outline**  
**Summer 2019**

<b>Instructor:</b>	Devin Fraser, CPA, CA, CFE
<b>Email:</b>	devin.fraser@carleton.ca
<b>Class Time:</b>	Section A: Tuesday 18:05 - 20:55 Section B: Thursday 18:05 - 20:55
<b>Class Location:</b>	Canal Building 3400
<b>Office Hours:</b>	After class as requested
<b>Office Location:</b>	Canal Building 3400

**Course Description:**

Data and information analysis with application to professional accounting.

**Course Learning Objectives:**

See course schedule below for course learning objectives (CPA Canada Technical Competencies) from the 2019 CPA Competency Map.

**Course Prerequisites:**

There are no prerequisites for this course.

**Required Textbook:**

Vernon Richardson, Katie Terrell, and Ryan Teeter, **Data Analytics for Accounting**, 1st Edition, McGraw Hill, 2019 (9781260375138)

<https://www.havenbooks.ca/>

**Drop Course Policy:**

The deadline for academic withdrawal is the last day of classes (each term).

**Methods of Evaluation:**

Component	Weight	Due Date
Case 1 (Group)	15%	Week 3 @ 18:00
Case 2 (Individual)	15%	Week 5 @ 18:00
Final Exam - Part A - Part B	25% 45%	August 20, 2019 18:00 - 21:00
<b>Total</b>	<b>100%</b>	

**Case 1:**

The case is posted on cuLearn and will be completed in groups of 3. You will place yourself into a group of 3 during the Week 1 class. The case involves the application and integration of major concepts covered in the course up to date in order to solve problems and issues presented in the case scenarios.

**Case 2:**

The case is posted on cuLearn and will be completed individually. The case involves the application and integration of major concepts covered in the course up to date in order to solve problems and issues presented in the case scenarios.

**Final Examination:**

The final exam is comprehensive, covering the material of the entire course. The final exam will consist of two parts.

- 1) Part A - Data Analytics Theory (Multiple Choice)
- 2) Part B - Application of Power BI (Power BI Case Submission)

Since Power BI is being used as part of the final examination, you must bring your windows computer with Power BI installed to complete the final examination.

**Deferred Final Examination:**

Students unable to write a final examination because of illness or other circumstances beyond their control must contact the instructor and the MAcc office in writing to request a deferred exam. Permission may be granted when the absence is supported by a medical certificate and or appropriate document(s) to support the reason for the deferral.

**Course Schedule:**

<b>Week</b>	<b>Topic/Agenda</b>	<b>CPA Canada Technical Competencies</b>	<b>Pre-Class Prep</b>
1	- Introduction to Course Outline - Introduction to Data Analytics Fundamentals - Excel (Hands On)	N/A Foundation Building	Chapter 1
2	- Data Preparation and Cleansing - Power Query Example (Hands On)	3.1.1; 3.1.3; 3.2.1	Chapter 2
3	- Data Visualization - Taxation Case (Hands On)	1.4.3; 1.4.4; 1.4.5; 6.7.1	Chapter 4
4	- The Modern Audit & Audit Data Analytics - Audit & Assurance Case (Hands On)	4.2.1; 4.2.2; 4.3.6; 4.3.8; 4.3.9; 4.3.10; 4.3.11	Chapters 5 & 6
5	- Generating Key Performance Indicators - Performance Management Case (Hands On)	2.3.1; 3.2.2	Chapter 7
6	- Financial Statement Analytics - Finance Case (Hands On)	5.1.3; 5.6.1	Chapter 8

## **ADDITIONAL INFORMATION**

### **Course Sharing Websites**

Materials created for this course (including presentations and posted notes, labs, case studies, assignments and exams) remain the intellectual property of the author(s). They are intended for personal use and may not be reproduced or redistributed without prior written consent of the author(s).

### **Required calculator in BUSI course examinations**

If you are purchasing a calculator, we recommend any one of the following options: Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

### **Group work**

The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

A+ = 90-100	B+ = 77-79	C+ = 67-69	D+ = 57-59
A = 85-89	B = 73-76	C = 63-66	D = 53-56
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52
F = Below 50			

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

### **Academic Regulations**

University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university's website, here:

<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>

### **Requests for Academic Accommodation**

You may need special arrangements to meet your academic obligations during the term. For an accommodation request, the processes are as follows:

**Pregnancy obligation**

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

**Religious obligation**

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: <https://carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf>

**Academic Accommodations for Students with Disabilities**

If you have a documented disability requiring academic accommodations in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or [pmc@carleton.ca](mailto:pmc@carleton.ca) for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC no later than two weeks before the first in-class scheduled test or exam requiring accommodation (if applicable). After requesting accommodation from PMC, meet with your instructor as soon as possible to ensure accommodation arrangements are made. [carleton.ca/pmc](http://carleton.ca/pmc)

**Survivors of Sexual Violence**

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and is survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: <https://carleton.ca/sexual-violence-support/>

**Accommodation for Student Activities**

Carleton University recognizes the substantial benefits, both to the individual student and for the university, that result from a student participating in activities beyond the classroom experience. Reasonable accommodation must be provided to students who compete or perform at the national or international level. Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. <https://carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf>

For more information on academic accommodation, please contact the departmental administrator or visit: [students.carleton.ca/course-outline](http://students.carleton.ca/course-outline)

**Academic Integrity**

Violations of academic integrity are a serious academic offence. Violations of academic integrity – presenting another's ideas, arguments, words or images as your own, using unauthorized material, misrepresentation, fabricating or misrepresenting research data, unauthorized co-operation or collaboration or completing work for another student – weaken the quality of the degree and will not be tolerated. Penalties may include; a grade of Failure on the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, amongst others. Students are expected to familiarize themselves with and follow the Carleton University Student Academic Integrity Policy which is available, along with resources for compliance at: <https://carleton.ca/registrar/academic-integrity/>

**Centre for Student Academic Support**

The Centre for Student Academic Support (CSAS) is a centralized collection of learning support services designed to help students achieve their goals and improve their learning both inside and outside the classroom. CSAS offers academic assistance with course content, academic writing and skills development. Visit CSAS on the 4th floor of MacOdrum Library or online at: [carleton.ca/csas](http://carleton.ca/csas)

**Important Information:**

- Students must always retain a hard copy of all work that is submitted.
- All final grades are subject to the Dean's approval.
- For us to respond to your emails, we need to see your full name, CU ID, and the email must be written from your valid CARLETON address. Therefore, in order to respond to your inquiries, please send all email from your Carleton CMail account. If you do not have or have yet to activate this account, you may wish to do so by visiting <http://carleton.ca/ccs/students/>

**Important dates and deadlines**

<https://carleton.ca/summer/dates-and-deadlines/>