2019 Bea Sanders/AICPA Honorable Mention ELS Poster

KAT Insurance: Intro Accounting Data Analytics Cases Using Excel, Power BI and/or Tableau
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Financial Accounting Case
- Cover any time after accounting cycle
- General learning objectives
  - Clean the data in a data set
  - Analyze sales trends
  - Interpret findings
- Excel skills: Sort, VLOOKUP, format, pivot table, pivot chart, calculated field, map chart
- Power BI skills: Import, table visualization, sort, slicer visualization, clustered column chart, map visualization
- Tableau skills: Join two tables, sort, visualizations, use Marks card, calculated field, tables, map chart

Managerial Accounting Case
- Cover any time after contribution margin concepts
- General learning objectives
  - Clean the data in a data set
  - Analyze cost and contribution margin data
  - Interpret findings
- Excel skills: Pivot table, Find & Replace, VLOOKUP, calculated columns and fields, sort pivot tables
- Power BI skills: Import, table visualization, calculated columns, LOOKUPVALUE, average, count, filter, slicer
- Tableau skills: Join two tables, sort, visualizations, filter, format, use Marks card, bar chart

Case Background
- Based on anonymized real-life national insurance data
- More than 65,000 records
- Both financial and managerial accounting cases can use Excel, Power BI and/or Tableau

AICPA Core Competencies
- Accounting competencies: Measurement analysis and interpretation, Technology and tools
- Business competencies: Strategic perspectives, Process and research management, Governance perspective, Customer perspective
- Professional competencies: Decision-making, Communication

Each KAT Project Includes:
1. Case (one-page)
2. 50-page instructor guide
3. Student guide
4. Instructions for obtaining software tools
5. Four versions of 65,000+ record data set
7. Annotated tutorial slides (pdf)
8. Editable grading rubric
9. Multiple-choice questions with solutions
10. Solution files
11. Check figures for students
12. Video assignment instructions (optional)

Excel vs. Power BI vs. Tableau
- Excel: + Familiar
  - Limited features
- Power BI: + Microsoft product
  - Will not run using Mac OS
- Tableau: + Windows and Mac OS
  - Need to register

Statistics
- >300 instructor requests from >20 countries
- >3,500 students completed the cases
- >93% of students found tutorials useful