

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

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KAT Insurance 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**

AccountingsAnalytics.com

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
6. Step-by-step tutorial video (close captioned) & 24-record tutorial 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)

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

Excel vs. Power BI vs. Tableau



- + Familiar
- Limited features



- + Microsoft product
- Will not run using Mac OS



- + 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