

**San José State University
Lucas Graduate School of Business**

**Master of Science in Taxation - MST
BUS 225E, Data Analytics and Security, Summer 2022**

Course and Contact Information

Instructor:	Steven Pocaroba
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Office Hours:	30 minutes after class AND by appointment + available by email
Class Days/Time:	Mondays: June 20th through August 15th from 6 PM – 10 PM No class on July 4th Saturday: August 6th from 9 AM to 5 PM
Classroom:	Zoom Conferencing
Prerequisites	MST Graduate Standing

Course Format

Technology Intensive, Hybrid, and Online Courses (Required if applicable)

Given the current environment, we will be interacting virtually for classes. It will be required to have cameras on at all times so that we may engage with each other as if we were all in the classroom together. If you have not used Zoom conferencing before, the College has setup times in advance of this course for you to gain familiarity with the features (screen sharing, background blocking so that you can only see your face if you have a messy room! etc.)

The course will highly rely on Alteryx, Power BI, and Tableau desktop software applications for hands-on experience using data and analytics. The instructor will post on Canvas the process to obtain students free access to these technology tools.

Alteryx Note: If you have a Mac, please note that you will need to access Alteryx through a virtual machine software (emulates Windows)

Faculty Web Page and MYSJSU Messaging (Optional)

Course materials such as syllabus, handouts, notes, assignment instructions, etc. on [Canvas Learning Management System course login website](#) at <http://sjsu.instructure.com>. You are responsible for regularly checking with the messaging system through [MySJSU](#) on [Spartan App Portal](#) <http://one.sjsu.edu> (or other communication system as indicated by the instructor) to learn of any updates.

Course Description (Required)

The landscape for Tax professionals today is more challenging than ever with tax reform legislation, complex new accounting rules, and corporate transformation pressuring departments to re-evaluate the way that they do things - beginning with streamlining antiquated processes and introducing new automation, but while also reducing risk and ensuring continued Sarbanes-Oxley compliance. Tax practitioners are expected to be more versatile and agile than ever in this environment to succeed - combining the best practices of being a “tax technologist” with those of being a subject matter expert in tax/accounting rules.

This class focuses on helping students understand the broader picture of “where” and “why” both emerging technologies and more mature technologies are being used in tax today, while also discussing key data and security implications that come with the territory. We will also then ultimately focus on “how” by delivering a highly hands-on learning experience where students immerse in some commonly industry used “Extract, Transform, and Load” and Visualization tools to develop their automation skillset, and enable them to hit the ground running in their day-to-day jobs - whether that be with corporate tax departments or professional services firms. We will also spend some time speaking to the next generation of technologies that we see gaining traction, and in general what we see for tax departments of the future.

Course Learning Outcomes (CLO) (Required)

Upon successful completion of this GE course, students will be able to:

1. Explain data analytics and its importance and uses within Tax
2. Identify and analyze appropriate data sets and the principles to follow in this process.
3. Use at least three data analytics/visualization tools: Tableau, Microsoft Power BI, and Alteryx
4. Explain robotic process automation (RPA) and be able to identify common use cases
5. Identify data security terminology, legal issues and practice concerns (digital and paper forms) and tools for preventing data breach, misuse and theft.
6. Understand the tax accountant’s responsibilities in securing data and relevant rules of conduct.

Required Texts/Readings (Required)

Textbook

Hooper, Tableau Analytics in the Accounting Classroom (See link below for purchasing options)

<http://biaalytics.com/AAA/>

Other Readings

Various, see Course Reader posted on Canvas

Other technology requirements / equipment / material

Software tools: Tableau, Microsoft Power BI, Alteryx and others – information posted on Canvas on how to obtain student access to these tools..

Course Requirements and Assignments (Required)

The course focuses on applied skills and includes hand-on experiences for students with data set, software applications and data visualization assignments. The course includes in-class group assignments, application sets, group presentations and final examination.

“Success in this course is based on the expectation that students will spend, for each unit of credit, a minimum of 45 hours over the length of the course (normally three hours per unit per week) for instruction, preparation/studying, or course related activities, including but not limited to internships, labs, and clinical practice. Other course structures will have equivalent workload expectations as described in the syllabus.”

Final Examination or Evaluation

The final examination is a cumulative examination and includes both multiple-choice questions, data analytics problems and open-ended questions - it will be administered during the final week of class.

One page of notes (not larger than 8.5" x 11", double-sided) will be allowed. The exam will be a combination of multiple-choice and written responses, unless stated otherwise. For any multiple-choice questions you must choose the best answer to each question to be awarded points for that particular question.

It is against MST and University policy to share answers among students (current, former or future).

Grading Information (Required)

Grading rubrics will be shared by the instructor via Canvas.

The course grading is structured as following:

In-class		
	Homework & Presentations	100
	ETL Certification	50
	Final exam	<u>100</u>
Total		250

Determination of Grades

There are no extra-credit opportunities available for this course. All assignments must be submitted by the posted deadline. Late submissions will not be considered and will yield a grade of zero.

Course grades are determined using the following table:

<i>Grade</i>	<i>Percentage</i>
<i>A plus</i>	<i>98 to 100%</i>
<i>A</i>	<i>92 to 97%</i>
<i>A minus</i>	<i>90 to 91%</i>
<i>B plus</i>	<i>88 to 89 %</i>
<i>B</i>	<i>82 to 87%</i>
<i>B minus</i>	<i>80 to 81%</i>
<i>C plus</i>	<i>78 to 79%</i>
<i>C</i>	<i>72 to 77%</i>
<i>C minus</i>	<i>70 to 71%</i>
<i>D plus</i>	<i>68 to 69%</i>
<i>D</i>	<i>62 to 67%</i>
<i>D minus</i>	<i>60 to 61%</i>
<i>F</i>	<i>Below 60%</i>

University Policies (Required)

Per University Policy S16-9 (<http://www.sjsu.edu/senate/docs/S16-9.pdf>), relevant information to all courses, such as academic integrity, accommodations, dropping and adding, consent for recording of class, etc. is available on Office of Graduate and Undergraduate Programs' [Syllabus Information web page](http://www.sjsu.edu/gup/syllabusinfo/) at <http://www.sjsu.edu/gup/syllabusinfo/> Make sure to review these university policies and resources with students.

Mission and MST Program Learning Goals

LCoB Mission Statement

We are the *institution of opportunity* in *Silicon Valley*, educating future leaders through *experiential learning* and character development in a *global business community* and by conducting *research* that contributes to business theory, practice and education.

MST Program Learning Objectives:

1	Global Economy	Evaluate tax compliance and planning issues within the context of our global economy.
2	Research	Prepare tax research reports based on primary authority.
3	Communication	Demonstrate effective written and oral communication skills for tax compliance and planning.
4	Tax Policy	Explain policy principles for existing tax law and proposals for change.
5	Ethics	Evaluate appropriate approaches to the ethical issues of tax compliance and planning.
6	Professional Development	Demonstrate skills for effective and inclusive tax practice to excel in the tax profession.