Wilkes University Curriculum Committee

PROPOSAL SUBMITTAL FORM

Directions:

- Use this set of forms for all proposals sent to the Curriculum Committee.
- Pages 1-3 of this document are required. Any unnecessary forms should be deleted from the packet before submissions. If multiple forms are needed (course addition, course deletion, etc), simply copy and paste additional forms into this packet.
- Note that all new programs (majors and minors), program eliminations, significant program revisions and all general education core revisions must be reviewed and approved by the Provost and Academic Planning Committee (APC) prior to submission to the Curriculum Committee. The Provost will make the decision if a program revision requires APC review.
- Completed and signed forms are due no later than the first Tuesday of every month. Submit one signed original hard copy and a scanned electronic copy with all signatures to the Chair of the Curriculum Committee.

1. Originator: Dr. Jennifer Edmonds (570.408.4719)  
   Dr. Shaokang Wang (570.408.4338)  
   Finance, Accounting & Management (FAM) Department  
   Phone and email: Jennifer.edmonds@wilkes.edu and shaokang.wang@wilkes.edu

2. Proposal Title: Business Analytics Minor

3. Check only one type of proposal: (double click on the appropriate check box and change default value to “checked”).

- [ ] New Program. (Major or Minor Degree Programs). This requires prior review and approval by the Provost and APC.
- [ ] Elimination of Program. (Major or Minor Degree Programs). This requires prior review and approval by the Provost and APC.
- [ ] Program Revision. Significant revisions to a program require review and approval by the Provost. The Provost determines if review and approval by APC is necessary.
- [ ] General Education Revision. Submissions only accepted from the General Education Committee (GEC). Must be reviewed and approved by the Provost.
- [ ] Creation of new departments, elimination of existing department. This requires prior review and approval by the Provost and APC.
- [ ] Course additions or deletions not affecting programs (such as elective courses, transition of “topics” courses to permanent courses).
- [ ] Change in course credit or classroom hours.
- [ ] Incidental Changes. Includes changes in course/program title, course descriptions, and course prerequisites. (Although these changes do require approval by the Curriculum Committee, they do not go before the full faculty for approval).
- [ ] Other (Specify)
4. Indicate the number of course modification forms that apply to this proposal:

5  Course Addition Forms (plus syllabi)
0  Course Deletion Forms
2  Course Change Forms (multiple courses listed on one form)

5. Executive Summary of Proposal.

The minor in Business Analytics would allow students to explore the opportunities in decision-making using quantitative methods and information science.

As the demand for business analytics jobs has continued to grow, we propose this minor to help our students embrace the rising opportunities for business analysts. The minor will enhance the curricular opportunities for students within the Sidhu School of Business & Leadership, specifically, the finance, accounting, and management degrees. We aim to, through the course requirements, equip our students with the discipline of applying quantitative analytical models to convert data into useful insights to help make better business decisions.

6. Other specific information: Career outlook for Business Analytics students

Analytical jobs rank high in U.S. News Best Business Jobs:

- Management Analyst ranks #7 in Best Business Jobs
  o Projected Jobs: 103,400
  o Median Salary: $80,880
  o Unemployment Rate: 3.0%

- Market Research Analyst ranks #11 in Best Business Jobs
  o Projected Jobs: 92,300
  o Median Salary: $61,290
  o Unemployment Rate: 2.4%

- Financial Analyst ranks #13 in Best Business Jobs
  o Projected Jobs: 32,300
  o Median Salary: $78,620
  o Unemployment Rate: 2.2%

7. Program Outline. (Not applicable for incidental changes).

Business Analytics Minor curriculum outline

<table>
<thead>
<tr>
<th>REQUIRED COURSES</th>
<th>ELECTIVE COURSES</th>
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</thead>
<tbody>
<tr>
<td>Students with the Bus. Analytic Minor must complete the following 7 credits:</td>
<td>• ACC 219. Financial Statement Analysis</td>
</tr>
<tr>
<td>• BA 119. Data Analysis in Excel</td>
<td>• BA 419. Quantitative Decision Making</td>
</tr>
<tr>
<td>• Either ACC 341 or MGT 257</td>
<td>• FIN 319. Financial Derivatives</td>
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<tr>
<td></td>
<td>• MGT 357. Business Transformations in the Digital Economy</td>
</tr>
</tbody>
</table>

Plus 9 additional credits of elective courses.
8. Signatures and Recommendations. (please date)
   • Signatures of involved Department chair(s) and Dean(s) indicate agreement with the proposal and that adequate resources (library, faculty, technology) are available to support proposal.
   • If a potential signatory disagrees with a proposal he/she should write “I disagree with this proposal” and a signed statement should be attached to this submission.

Jennifer Edmonds
Print Name/Title: Finance, Accounting & Management Department Chair
Signature Date: 11 APR 2016

Jennifer Edmonds
Print Name/Title: Interim Dean of the Sidhu School of Business & Leadership.
Signature Date: 11 APR 2016

Susan Hritzak
Print Name: Registrar
Signature Date: 4-11-16

Anne Skleder
Print Name: Provost (For new programs, significant revisions and revisions to the General Education Program revisions only).
Signature Date: 5/11/16

Provost should check here _____ if this proposal is a program revision AND the significance of the revision requires review and approval by APC prior to Curriculum Committee.

Jeff Stratford
Print Name: Chair, Academic Planning Committee. For new programs, program revisions sent via the provost. Signature indicates that the proposal has been reviewed and approved by APC.
Signature Date: 4/11/16

NA
Print Name: Chair, General Education Committee. For revisions to General Education program only. (Signature indicates that the proposal has been approved by GEC).
Signature Date:
Financial Statement Analysis

ACC 219

3

0

ACC 162, BA 119, FIN 240

Course descriptions provide an overview of the topics covered. If the course is offered on a scheduled basis, i.e. every other year, or only during a set semester, note this in the description. Course descriptions should be no more than two to three sentences in length.

This course will focus on corporate financial reporting, evaluation, financial planning, accounting policies and practices, and other current issues. The interplay between accounting and corporate finance will be emphasized. The course will teach you how to use financial statement information for firm valuation and other economic decisions. The course will also help you understand and analyze the issues that corporate managers face as they design and implement financial reporting strategies, increasing your ability to assess accounting quality. This course will provide you with tools to analyze and exploit information in corporate financial statements.

Attach proposed syllabus immediately after this document. In some situations the official syllabus may contain information which is beyond the review needs of the Curriculum Committee (such as extensive rubrics, etc). It is permissible to attach an abbreviated syllabus. In general, syllabi (whether full or abbreviated) should contain the following information: Course Title, Course Number, Credit hours, Faculty Information (name contact information, office hours), Course Description, Course Outcomes or Objectives, Assessment (grading) informations, required texts (or other things such as tools, software, etc), pertinent policies and a proposed schedule of topics.
ACC219
Financial Statement Analysis

Instructor: Emma Hao
Phone: 570-408-4739
Office hour: 
Office: UCOM 222E
Email: qian.hao@wilkes.edu

Course Description:
This course will focus on corporate financial reporting, evaluation, financial planning, accounting policies and practices, and other current issues. The interplay between accounting and corporate finance will be emphasized. The course will teach you how to use financial statement information for firm valuation and other economic decisions. The course will also help you understand and analyze the issues that corporate managers face as they design and implement financial reporting strategies, increasing your ability to assess accounting quality. This course will provide you with tools to analyze and exploit information in corporate financial statements. (Prerequisite: Acc162 & Fin240)

Objectives:
Content Objectives
This course will provide you with tools to analyze and exploit information in corporate financial statements. The interplay between accounting and corporate finance will be emphasized. The course will teach you how to use financial statement information for firm valuation and other economic decisions. The course will also help you understand and analyze the issues that corporate managers face as they design and implement financial reporting strategies, increasing your ability to assess accounting information.

Competencies Objectives
• To be able to analyze accounting cases and appropriately apply various accounting principles, auditing standards, and/or ethical decision-making approaches.
• Integrate concepts from previous accounting and finance courses to advance robust and insightful analysis and make informed and supported business decisions and recommendations.

Sensitivities Objectives
To understand the ethical dimensions of financial decision-making, financial reporting and auditing.

Required Text:
Grading:
Two Exams 50%
Financial statement analysis report (due end of the semester) 30%
Class participation and homework 20%

90.00% and higher weighted average = 4.0
85.00 – 89.99% = 3.5
80.00 – 84.99% = 3.0
75.00 – 79.99% = 2.5
70.00 – 74.99% = 2.0
65.00 – 69.99% = 1.5
60.00 – 64.99% = 1.0
59.99% and below weighted average = 0.0

Financial statement analysis report guideline will be distributed during the semester.

Chapters to be covered:
Ch1: A framework for business analysis and valuation using financial statements
Ch3: Overview of accounting analysis
Ch4: Implementing accounting analysis
Ch5: financial analysis
Ch6: Prospective analysis: forecasting
Ch7: Prospective analysis: valuation theory and concepts
Ch8: Prospective analysis: valuation implementation
Ch10: Credit analysis and distress prediction
Ch11: Mergers and acquisitions
Ch12: Communication and governance
Ch9: Equity security analysis
Wilkes University Curriculum Committee
COURSE ADDITION FORM – page 1

1. Course Title: Data Analysis in Excel

2. Course Number: BA 119

3. Course Credit Hours: Classroom Hours 1 Lab Hours 0 Other NA

4. Course Prerequisites: NA

5. Course Description (as proposed for the Bulletin): Course descriptions provide an overview of the topics covered. If the course is offered on a scheduled basis, i.e. every other year, or only during a set semester, note this in the description. Course descriptions should be no more than two to three sentences in length.

This course is designed to teach the basic and advanced features and functions of Excel, including summative, descriptive and reporting techniques. Students will also gain the knowledge of data manipulation and visual reporting. This one-credit class will meet multiple times each week, and will run for 5 consecutive weeks.

6. Required Documentation:
   Proposed Syllabus Attach proposed syllabus immediately after this document. In some situations the official syllabus may contain information which is beyond the review needs of the Curriculum Committee (such as extensive rubrics, etc). It is permissible to attach an abbreviated syllabus. In general, syllabi (whether full or abbreviated) should contain the following information: Course Title, Course Number, Credit hours, Faculty Information (name contact information, office hours), Course Description, Course Outcomes or Objectives, Assessment (grading) informations, required texts (or other things such as tools, software, etc), pertinent policies and a proposed schedule of topics.
BA 119. Data Analysis in Excel

This course is designed to teach the basic and advanced features and functions of Excel, including summative, descriptive and reporting techniques. Students will also gain the knowledge of data manipulation and visual reporting. This one-credit class will meet multiple times each week, and will run for 5 consecutive weeks.

Contact Information for Dr. Jennifer J. Edmonds
- email: jennifer.edmonds@wilkes.edu
- office: (570) 408-4719
- Office location: UCOM 216G

Office Hours
The best way to receive a prompt response from me is via email. For more in-depth follow up regarding course content or assignments, I am available for consultation outside of class (without an appointment) during the following office hours:
  - XXXXX
  ...otherwise by appointment.

Course Learning Objectives
This course supports the Business Analytics Minor and as such, students will achieve the following introductory outcomes associated with the minor in Business Analytics include:
  - Demonstrate knowledge of statistical data analysis techniques utilized in business decision-making.
  - Integrate information technologies with data science methods to extract value from data sets.
  - Apply quantitative modeling and data analysis techniques to the solution of real world business problems, communicate findings, and effectively present results using data visualization techniques.

Required Course Resources

In addition, I will provide you with free access to related material throughout the course including, but not limited to the following:
  - https://support.office.com/en-us/excel
  - http://spreadsheets.about.com/od/excel101/

It will be to your benefit to take advantage of these supplemental resources.

Course Content
Week 1. Introduction to Microsoft Excel
Week 2. Formulas and Functions
Week 3. Descriptive Techniques
Week 4. Modeling Techniques
Week 5. Reporting Techniques
Course Assignments

Homework Assignments. The homework assignments are designed to reinforce class concepts and techniques. At least two homework assignments will be due each week (at the beginning and end of each week). Late submissions are not accepted. Homework files should be submitted electronically via D2L; email submissions are not accepted. Each assignment is worth 10 points (and in total, homework accounts for 50% of the final grade).

Projects. There will be two projects assigned in the course. These projects are designed to engage the students in deeper thinking on the material covered. The purpose of these assignments is to sharpen the students' ability to concisely, yet effectively communicate concepts in data analysis and organization and improve written and verbal presentation skills. Each project is worth 50 points (and in total, projects account for 50% of the final grade).

Course Grading Scale For All Assignments
This course uses the following grading scale:

Exceeded Expectations. To receive a grade in this category, you will have far exceeded the minimum expectations for the course and course assignments. Grades in this category as defined as a 4.0 or 94% and above.

Met Expectations. To receive a grade in this category, you will have at least met the minimum expectations for the course and course assignments. Grades in this category as defined as 3.0 or 80-86%. There is leeway between the upper two categories, defined numerically as a 3.5 (87-93%).

Did Not Meet Expectations. To receive a grade in this category, you will have not met the majority of the minimum expectations for the course and course assignments. Grades in this category as defined as a 1.5 (65-69%) or 1.0 (60-64%). Grades below this threshold are not passing. There is leeway between the lower two categories, defined numerically as a 2.5 (75-79%) or 2.0 (70-74%).

Classroom Policies

Attendance. Attendance at all classes is expected. One or two excused absences are often times unavoidable, so if you must miss a class, the excuse for an absence must come in writing (email is acceptable) BEFORE regular class time. For each unexcused absence, one point will be deducted from your final grade.

Classroom Etiquette. We will utilize many different lecturing and learning practices. Each student is expected to be attentive and courteous during lectures, classroom exercises and activities. Excessive monitoring of email, instant messenger or other web-communication services, non-relevant web browsing are examples of unacceptable behavior.
1. Course Title: Quantitative Decision Making

2. Course Number: BA 419

3. Course Credit Hours: Classroom Hours 3  Lab Hours 0  Other
   NA

4. Course Prerequisites: NA

5. Course Description (as proposed for the Bulletin): Course descriptions provide an overview of the topics covered. If the course is offered on a scheduled basis, i.e. every other year, or only during a set semester, note this in the description. Course descriptions should be no more than two to three sentences in length.

   This course is designed to build on the basics of introductory statistics so that the students understand how a variety of advanced statistical tools are used to support decision-making using business data. Students develop necessary skills to build models that conform the assumptions of the procedures. The course aims to provide more hands on experience. The topics that will be introduced include descriptive statistics, t-tests, ANOVA, simple linear regression, multiple linear regression, logistic regression and their applications on business data.

6. Required Documentation: Proposed Syllabus
   Attach proposed syllabus immediately after this document. In some situations the official syllabus may contain information which is beyond the review needs of the Curriculum Committee (such as extensive rubrics, etc). It is permissible to attach an abbreviated syllabus. In general, syllabi (whether full or abbreviated) should contain the following information: Course Title, Course Number, Credit hours, Faculty Information (name contact information, office hours), Course Description, Course Outcomes or Objectives, Assessment (grading) informations, required texts (or other things such as tools, software, etc), pertinent policies and a proposed schedule of topics.
Semester Year BA419 Quantitative Decision Making
Faculty: Assist. Prof. Bulent Erenay, PhD
Office: UCOM 222B
Place: 
Email: bulent.erenay@wilkes.edu
Phone: 570-408-4485
Office Hours: 11:00am-01:30pm M-W.

Course Description:
This course is designed to build on the basics of introductory statistics so that the students understand how a variety of advanced statistical tools are used to support decision-making using business data. Students develop necessary skills to build models that conform the assumptions of the procedures. The course aims to provide more hands on experience. The topics that will be introduced include descriptive statistics, t-tests, ANOVA, simple linear regression, multiple linear regression, logistic regression and their applications on business data.

Prerequisites: BA-119 and BA-319 Business Statistics. Intermediate math and computer competency, and MS Excel proficiency.

Time: BA419 xx-xx xx:xx - yy:yy

Textbooks and resources
1) Required: TBA
2) Supplementary readings: Research articles and white papers from literature and business professionals. I will provide links or a printed/pdf copy of a recent article published in the journals/media. Students will be asked to read the article and contribute to the brief discussion in class or online to gain a greater perspective on quantitative decision making issues or trends.
3) Multimedia resources
4) Statistics software (Spreadsheets and SPSS)

Supplementary resources
The Practice of Statistics for Business and Economics by Moore, McCabe, Alwan, and Craig, 4th Ed. McMillan

Course Learning Objectives
1) To provide an understanding of the value and use of quantitative methods on business data to solve problems and to support decision-making.
2) To develop an understanding of a variety of quantitative methods and statistical techniques applicable to a wide range of business situations.
3) Use regression analysis and other techniques to analyze business data.
Reaching the instructor
Best way to communicate with me is via email. Getting an appointment is encouraged but not required for the office hours. Priority will be given to the students who have appointments. **If you cannot meet me during office hours, my commitment is to find a time that works for you.** LIVE will be actively used to share course materials and communicate with students. PowerPoints presentations will be posted on LIVE. If you want faster response to your message, forward the message to my email as well.

Email Policy
Always include BA419(Your Section), your first and last name, and the subject in the email subject line to ensure fast response, i.e., “BA419, John Doe, Homework2 Question1 formulation”.

Computer Requirements, cell phones, tablets, calculators
You have to use a computer to type homework, project and other assignments. If you do not have a computer, you may use the computers in UCOM 134 or in other places where the university provides. You will need a simple calculator throughout the course for assignments and exams.

Your cell phones must be in silent mode or turned off and put in your bag unless the instructor approved it to be with you because of a possible emergency. You may follow the presentations from your laptops and tablets and take notes on them. You are NOT allowed to use them for any other purpose in class.

Special Needs
Any student with special needs (such as disability or health issues) should bring this to my attention as soon as possible, but not later than the second week of class so that we may arrange reasonable accommodations. As part of this process, please be in touch with university services and provide paperwork.

Grade distribution
- Coursework (individual and group) **30%**
  - Homework (individual or group)
  - White papers and case study reviews and applications (individual or group)
  - Quiz (individual)
  - In-class participation (individual)
- Midterms **25%**
- Project: **10%**
- Topics in QDM (research report and presentation on selected topics) (group) **10%**
- Final Examination (individual) **25%**
The score (as a percentage) you receive for each requirement is multiplied by the associated weight (percentage). After you have completed all requirements, apply the weights and sum the resulting scores. This sum will be your final score.

I expect you read the provided course materials before class. You are responsible for all the material that is provided to you either in class or online. I may exclude some of them for the exams.
Final grades will be assigned using the following scale.

<table>
<thead>
<tr>
<th>Course Grade</th>
<th>Percent</th>
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<tbody>
<tr>
<td>4.0</td>
<td>93-100</td>
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<tr>
<td>3.5</td>
<td>87-92.99</td>
</tr>
<tr>
<td>3.0</td>
<td>80-86.99</td>
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<tr>
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<td>75-79.99</td>
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<tr>
<td>2.0</td>
<td>70-74.99</td>
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<tr>
<td>1.5</td>
<td>65-69.99</td>
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<tr>
<td>1.0</td>
<td>60-64.99</td>
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</table>

Assignment will be provided via LIVE or in class. Respondus may be used for some of the assignments/quizzes. Work must be printed and submitted in-class and/or must be uploaded to the Dropbox of the course on time to receive full credit. Each assignment will have submission directions. All digital submissions should be received before 11:59 PM on the due date. Paper-based submissions should be handed at the beginning of the class on the due date. For any late assignment, 10% will be taken off the available points per every 24 hours. After two days, your work will not be accepted. We will use Dropbox for all digital homework collections. Absolutely no email submissions are accepted. Missed exams may only be made up when a legitimate class absence occurs.

If a class assignment you have submitted is not returned to you (while other students in your class received theirs), it is possible that your homework got lost or was not received by the professor at all. It is your responsibility to keep track of your assignment grades and inform me ASAP (within 2 weeks) if there is any problem.

The homeworks, reviews and reports must
1) be fully **typed**
2) have a title page with date, title, team members (if any) and "BA419 – Quantitative Decision Making”
3) be stapled together in the upper left corner if they have multiple pages.
Midterm and Final exams

Students are responsible for material from lectures, readings, videos and all other material covered in class and provided online. It is important that your schedule permits you to be free on presentation and exam dates. Absence from an exam or presentation will result in a score of zero, unless cleared in advance. More information about the content of the final will be provided prior to the final date. Communication devices may not be used during the final. All communication devices must be turned off and put away. The final is closed book/notes. You will also need to bring a calculator to the final. There will be no early, late or make-up exams except in the case of documented medical emergency or university-authorized absence. The midterm exams are one class period in length.

Project (Data Analysis)
Students will analyze a given business dataset and write a report about it. Details will be provided.

Topics in Operations Management
A topic in operations management area will be assigned to each group. Each group will make a research about the assigned topic and prepare a report about it. Topics will be presented towards the end of semester. Students are expected to have a professional appearance during presentations. Classroom presentations will be graded by the class, and the content will be graded by the professor.

A group will have 2-3 members. Students are encouraged to form the project groups in the first week of the semester. Timeline for the project will be provided by the professor later.

Attendance policy:
Class attendance is encouraged, and required, each student is allowed two (2) absences. Each absence after the first two will result in a loss of one (1) point off the final grade in the class. Class attendance, along with punctuality and class participation, will be used as an input for determination of final grades in borderline cases. I will follow the school attendance policy for other matters.

If a student is absent on days when tests are scheduled or papers are due, he or she is required to notify the instructor in advance by phone, email, written note or fax. Otherwise, the absence will not be excused. The contact can be made by you, a family member or a friend. Upon returning to class, bring documentation of the illness within a week, signed by a health care professional. The official documentation should explicitly request that the student be excused from school on that particular day.

General Expectations
In the business world, there is no room for absenteeism, tardiness, inadequate preparation, or request for special treatment. Students are expected to behave civilly and responsibly with regard to all aspects of this course. This includes Student-Instructor communication. Politeness and professional conduct are expected at the Sidhu School of Business. This means not talking while your peers, professors or guest speakers are addressing the class.
Please arrive on time and stay until class is dismissed, or if you cannot, please speak with your professor before or after class.

Scholastic dishonesty policy:
At Wilkes the faculty and the entire University community share a deep commitment to academic honesty and integrity. The following are considered to be serious violations and will not be tolerated:

1. Plagiarism: the use of another’s ideas, programs, or words without proper acknowledgment
2. Collusion: improper collaboration with another in preparing assignments, computer programs, or in taking examinations
3. Cheating: giving improper aid to another, or receiving such aid from another, or from some other source.
4. Falsifying: the fabrication, misrepresentation, or alteration of citations, experimental data, laboratory data, or data derived from other empirical methods.

For more information about policies at Wilkes University, please see the Student Handbook. I may use special software that is available at the university for the reports and reviews submitted for plagiarism. If I suspect that a student has violated academic integrity in this course, I am expected by University Rules to report my suspicions to the Dean of Students, the Provost, and Student Affairs Cabinet.

To avoid academic misconduct (integrity), the following links provide useful information:

- Ten Suggestions for Preserving Academic Integrity (http://oaa.osu.edu/coamnetsuggestions.html)
- Eight Cardinal Rules of Academic Integrity (http://www.northwestern.edu/provost/policies/academic-integrity/cardinal-rules.html)

<table>
<thead>
<tr>
<th>Tentative Course Schedule</th>
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<tbody>
<tr>
<td>Module 1</td>
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<td>Module 2</td>
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<td>Module 9</td>
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<td>Module 10</td>
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</table>
Order of the subjects may change. Also depth of the subjects and the time spent on each subject may differ from each other. Part of some subjects may be given to students as Project topics.

Your decision to participate in this course signifies your acceptance of all in this syllabus.
Wilkes University Curriculum Committee
COURSE ADDITION FORM – page 1

1. Course Title: Financial Analysis

2. Course Number: FIN 219

3. Course Credit Hours: Classroom Hours 3 Lab Hours 0 Other NA

4. Course Prerequisites: BA 119, FIN 240

5. Course Description (as proposed for the Bulletin): Course descriptions provide an overview of the topics covered. If the course is offered on a scheduled basis, i.e. every other year, or only during a set semester, note this in the description. Course descriptions should be no more than two to three sentences in length.

This course is an introductory course on the fundamentals of financial analysis techniques. It aims to help students develop analytical skills for making investment decisions. Furthermore, it focuses on less well-established techniques and knowledge that is alien to and ignored by efficient market hypothesis (EMH) or modern portfolio theory (MPT). The emphasis is on: technical analysis, Microsoft Excel tools in a financial context and Bloomberg terminals.

6. Required Documentation:
   Proposed Syllabus Attach proposed syllabus immediately after this document. In some situations the official syllabus may contain information which is beyond the review needs of the Curriculum Committee (such as extensive rubrics, etc). It is permissible to attach an abbreviated syllabus. In general, syllabi (whether full or abbreviated) should contain the following information: Course Title, Course Number, Credit hours, Faculty Information (name contact information, office hours), Course Description, Course Outcomes or Objectives, Assessment (grading) informations, required texts (or other things such as tools, software, etc), pertinent policies and a proposed schedule of topics.
FIN 219 Financial Analysis  
(semester, year)  

COURSE SYLLABUS  

Instructor: Dr. Shaokang Wang (Ken)  
Email: shaokang.wang@wilkes.edu  
Office: UCOM 220E (UCOM: University Center on Main, 169 South Main Street)  
Phone: (570) 408-4338  
Class Schedule:  
Class Location: UCOM 134 (Bloomberg Trading Lab)  
Office Hours: or by appointment  

1. Course Overview  
This course is an introductory course on the fundamentals of financial analysis techniques. It aims to help students develop analytical skills for making investment decisions. Furthermore, it focuses on less well-established techniques and knowledge that is alien to and ignored by efficient market hypothesis (EMH) or modern portfolio theory (MPT). The emphasis is on: technical analysis, Microsoft Excel tools in a financial context and Bloomberg terminals.  
Prerequisite: BA 119 and FIN 240.  

2. Learning Goals  
The overall goal of FIN 219 is about how to speculate. Upon completion of this course, students should be able to (with lecture topics):  
1. Use spreadsheets to conduct financial analysis: Topic I. Financial Analysis with Excel.
(1) Common stock valuation

(2) Trend forecasting

(3) Modern Portfolio Theory (MPT)

2. Conduct the analysis of price and volume patterns as indicators of stock trends:

   **Topic II. Technical Analysis (TA)**

   (1) Profitable patterns

   (2) Key analytical tools

   (3) Advanced topics by Stan Weinstein and by William O’Neil


   (1) Individual security analysis: company analysis; comparative analysis; charting.

   (2) Portfolio analysis: portfolio construction; portfolio management.

   Please note: in this course, we target potential **market inefficiencies**. It is not easy to discover useful generalizations of how to invest or speculate successfully. You need to get into a position to apply some ideas that various people have proposed, while whose ultimate value is not easy to know. Therefore you should learn and practice before you can judge their value through experience.

3. **Textbooks and Materials**

   **Textbook**: There is **NO** required textbook for FIN 219.

4. **Student Responsibilities**

   (1) **Attendance**: We will cover each of the three topics in about five weeks. Class notes and other materials will be posted at our L.I.V.E. website ([https://live.wilkes.edu/](https://live.wilkes.edu/)). Make sure you attend the classes and understand the topics. Moreover, please check the L.I.V.E. website regularly for updates and announcements.
(2) **Do not get behind:** Due to the cumulative nature of the course, lack of understanding in one topic may lead to immense confusion and very poor performance in later discussions. Read the appropriate material in the notes prior to lectures. Or, if you happen not to be able to come to class, you can either contact me for class materials or ask help from your classmates to catch up with the class. Do not hesitate to ask questions during and after the class.

(3) **Solve the practice problems:** There will be NO homework assignments in this course. Instead, I will do the practice problems in class to help you understand the topics. Those questions also serve as an indication of what you should expect in the exams. Although I will provide you with the answers, please try your best to work on the problems.

(4) **Academic Integrity:**
- Honesty is of course expected and required. As in all courses, you are expected to do your own work on exams. Do not plagiarize, cheat, or lie.
- If any student were found in violation of the rules of academic integrity, he/she would be assigned a “zero” (0) grade and would be reported to the Department and the School of Business.
- Please refer to the Wilkes University’s 2015–2016 Undergraduate Handbook for details. The handbook can be found at: [http://www.wilkes.edu/PDFFiles/StudentHandbook/StudentHandbook201415.pdf](http://www.wilkes.edu/PDFFiles/StudentHandbook/StudentHandbook201415.pdf). Information about the academic integrity can be found on Page 74 to Page 76, under “ACADEMIC REGULATIONS”.

5. **Basis for Final Score**

The final score in this course will be based on following **FIVE** components:

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Percent of Final Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Three (3) individual projects</td>
<td>30%</td>
</tr>
<tr>
<td>2. Three (3) group projects</td>
<td>45%</td>
</tr>
<tr>
<td>3. Group presentation</td>
<td>10%</td>
</tr>
<tr>
<td>4. Bloomberg Essentials</td>
<td>5%</td>
</tr>
</tbody>
</table>
Certification
5. Attendance 10%
Total 100%

6. Grading Policies

Grades for the course will be determined from the following scale:

<table>
<thead>
<tr>
<th>If ...</th>
<th>then, your course grade will be:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your total score ≥ 93</td>
<td>4.0</td>
</tr>
<tr>
<td>86 ≤ your total score ≤ 92.99</td>
<td>3.5</td>
</tr>
<tr>
<td>80 ≤ your total score ≤ 85.99</td>
<td>3.0</td>
</tr>
<tr>
<td>75 ≤ your total score ≤ 79.99</td>
<td>2.5</td>
</tr>
<tr>
<td>70 ≤ your total score ≤ 74.99</td>
<td>2.0</td>
</tr>
<tr>
<td>65 ≤ your total score ≤ 69.99</td>
<td>1.5</td>
</tr>
<tr>
<td>60 ≤ your total score ≤ 64.99</td>
<td>1.0</td>
</tr>
<tr>
<td>Your total score &lt; 60</td>
<td>0.0</td>
</tr>
</tbody>
</table>

(1) Three individual projects (30%)
- Topic I
- Topic II
- Topic III

(2) Three group projects (45%)
- Topic I
- Topic II
- Topic III

(3) Group presentation (10%)
- On the last day of class, each group will present one group project. Every group member must participate in the presentation. There is NO dress code.
NOTE: Although (2) Group projects, and (3) Group presentation are team-based, group members will be evaluating each other based upon participation, contribution, and cooperation. The team peer evaluation and the faculty assessment of team participation will be reflected in the group grade and each individual's grade for the group assignments. As a result, some individual grades MAY be higher or lower than those grades for the rest of the group.

(4) Bloomberg Essentials Certification (5%)

- You are required to get used to the Bloomberg Terminals (in the trading lab, UCOM134) and pass the five Bloomberg Essentials Certification Exams by the end of the semester. After passing all the exams, you will receive the following four certificates. In order to receive the 5 points, you must present an electronic copy of you four Bloomberg Essentials Certificates.

  (a) Equity Essentials;
  (b) Fixed Income Essentials;
  (c) FX Essentials;
  (d) Commodity Essentials.

- General procedures:
  - Set up an account on a Bloomberg terminal.
  - After you log into the system, type in "BU" for Bloomberg University or "BESS" for Bloomberg Essentials.
- Look for “Online Training” to start the training.

- Note: you have to pass the “Core Exam” before you can take the four essentials exams on equity, fixed income, foreign exchange, and commodity.

(5) Attendance (10%)

- Attendance at lectures is weighted as 10% of the final grade. I will record the class attendance RANDOMLY eleven times during the semester. Detailed attendance score calculation is explained in the following table.

<table>
<thead>
<tr>
<th># of attendance</th>
<th>11</th>
<th>10</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance score</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

7. Class Schedule (tentative)
1. Course Title: Business Transformations in the Digital Economy

2. Course Number: MGT 357

3. Course Credit Hours: Classroom Hours 3   Lab Hours 0   Other NA

4. Course Prerequisites: ACC 162, BA 119, FIN 240

5. Course Description (as proposed for the Bulletin): Course descriptions provide an overview of the topics covered. If the course is offered on a scheduled basis, i.e. every other year, or only during a set semester, note this in the description. Course descriptions should be no more than two to three sentences in length.

This course is designed to help students understand how the digital economy forces companies to rethink their business strategies—and architect processes, products, and information differently. Topics will allow for the development of problem solving abilities using business analytics and intellectual curiosity using radical openness in the workplace. The course content will incorporate cases in business, and it will seek to create an understanding of big data, culture and ubiquitous technologies. Students will also understand how to thinking critically and to make decisions using internal and external sources of data.

6. Required Documentation: Proposed Syllabus

Attach proposed syllabus immediately after this document. In some situations the official syllabus may contain information which is beyond the review needs of the Curriculum Committee (such as extensive rubrics, etc). It is permissible to attach an abbreviated syllabus. In general, syllabi (whether full or abbreviated) should contain the following information: Course Title, Course Number, Credit hours, Faculty Information (name contact information, office hours), Course Description, Course Outcomes or Objectives, Assessment (grading) informations, required texts (or other things such as tools, software, etc), pertinent policies and a proposed schedule of topics.
WILKES UNIVERSITY

MGT 357 Business Transformations in the Digital Economy

Term: Fall 2016
Professor: Kathleen Houlihan, Ph.D., MBA
Jay S. Sidhu School of Business and Leadership

Contact Information:
Office Location: UCOM 221D
Office Telephone: (570) 408-3235
*Email: kathleen.houlihan@wilkes.edu
(*Preferred method of contact)

Office Hours:

Pre-requisite: ACC 162, BA 119, FIN 240

COURSE OUTLINE

Course Description:
This course is designed to help students understand how the digital economy forces companies to rethink their business strategies--and architect processes, products, and information differently. Topics will allow for the development of problem solving abilities using business analytics and intellectual curiosity using radical openness in the workplace. The course content will incorporate cases in business, and it will seek to create an understanding of big data, culture and ubiquitous technologies. Students will also understand how to thinking critically and to make decisions using internal and external sources of data.

Course Objectives: The main learning emphasis in this course is placed on the use of business intelligence for advanced decision-making. The specific objectives of this course include:

1. Understand the importance of business analytics to you and your future
2. Learn to think critically and manage information using technology
3. Analyze and solve future business problems in the digital economy
4. Working in teams to develop business intelligence and potential solutions for major corporations using business analytics.
5. Demonstrate decision-making abilities through the use of cases studies

Student Learning Objectives:
The Wilkes University Business Program defines Sensitivities as an awareness of the contextual environment that influences organizational decision-making. This course includes the following:
• Ethical- fairness, integrity, justice, norms, objectivity, values
• Diversity – age, cultural, economic, educational, ethnic, geographical, individual, physical and mental challenges, political, racial, religious, gender, social.
• Change Orientation- including adaptability, flexibility, life-long learning, open mindedness, risk assessment, responsiveness.
- Leadership - the process of social influence where one can enlist the support of other to achieve an objective.
- Transparency-authentic, systematic, proactive, timely, understandable, judicious, credible, comparable and interactive sharing of information with stakeholders
- Project Management - process, implementation, monitor, and control

**Required Text:**

Harvard Case Pack

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Cases</th>
<th>Assignment and Corresponding Deadlines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Introduction-Syllabus</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Chapter 1-Case-Digital Capital: Harnessing the Power of Business Webs</td>
<td>Case Report</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Chapter 2</td>
<td>Final Project Summary</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Chapter 3</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Chapter 4</td>
<td></td>
</tr>
<tr>
<td>6</td>
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<td>Chapter 5</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>Chapter 6</td>
<td></td>
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<tr>
<td>8</td>
<td></td>
<td>Chapter 7</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>• Case: Cisco Systems Architecture: ERP and Web-Enabled IT</td>
<td>Case Report</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>• Case:</td>
<td>Case Report</td>
</tr>
</tbody>
</table>

26
<table>
<thead>
<tr>
<th>11</th>
<th>Wyndham International: Fostering High-Touch with High-Tech</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Case: Providian Trust: Tradition and Technology (A)</td>
</tr>
<tr>
<td></td>
<td>Case Report</td>
</tr>
<tr>
<td>12</td>
<td>• Case: Mrs. Fields Cookies</td>
</tr>
<tr>
<td></td>
<td>Case Report</td>
</tr>
<tr>
<td>13</td>
<td>Presentations</td>
</tr>
<tr>
<td>14</td>
<td>Presentations</td>
</tr>
<tr>
<td>15</td>
<td>Final Exam</td>
</tr>
<tr>
<td></td>
<td>Final Paper is Due 3pm</td>
</tr>
</tbody>
</table>

Note: Changes to this schedule are possible as the semester progresses. I will announce all changes well in advance. You are responsible for any changes made to this schedule even if you are absent from class the day changes are announced. You should consult with fellow students and me immediately if you miss a class meeting.

**BASIS FOR FINAL GRADE**

**Case Questions:** (30%) This assignment involves completion of a Case Study, which will be assigned. Students will need to prepare an individual written report on the case by answering the questions presented. The paper should be a short summary of findings with a minimum of 5 references for each case.

**Final Project:** In this project, each student will select and business analytics research problem.
- **Part 1:** (5%) Includes a brief summary of the topic. This paper will include why you are interested in researching this topic. 2 pages minimum using APA 6 format- 5 references. Assignment due at 3rd week.
- **Part 2:** (35%) You will complete your business analysis throughout the semester and present to the class during the last two weeks of scheduled class.

**Class Participation:** (10%) Preparation, Presence and Participation - Preparation of assigned readings is essential for productive class time and earning full credit for class participation. The class discussions require your active participation and the research conducted before you arrive to class. You are responsible for analyzing the cases, updating the class on information concerning the case, and participating in the class discussion. Your
comments should go beyond just the repetition of case facts and talking points and should address material from your research and your major and focus on developing critical thinking and problem solving skills.

Grading Summary:
Final Project 40 % (5% Part 1 & 35% Part 2)
Class Participation 10 %
Case Questions 30 %
Mid Tem Exam 10 %
Final Exam 10 %

Grade Regulations

<table>
<thead>
<tr>
<th>Course Percentage</th>
<th>University Grading Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%-95%</td>
<td>4.0 = A Academic achievement of outstanding quality</td>
</tr>
<tr>
<td>94%-90%</td>
<td>3.5 = B+ Academic achievement above high quality</td>
</tr>
<tr>
<td>89%-84%</td>
<td>3.0 = B Academic achievement of high quality</td>
</tr>
<tr>
<td>83%-80%</td>
<td>2.5 = C+ Academic achievement of adequate quality but below the average required for graduation</td>
</tr>
<tr>
<td>79%-75%</td>
<td>2.0 = C Academic achievement of acceptable quality in meeting requirements for graduation</td>
</tr>
<tr>
<td>74%-70%</td>
<td>1.5 = D+ Academic achievement above the minimum quality required for credit</td>
</tr>
<tr>
<td>69%-65%</td>
<td>1= Academic achievement of minimum quality required for credit</td>
</tr>
<tr>
<td>64% or less</td>
<td>0= Academic achievement below the minimum required for course credit</td>
</tr>
</tbody>
</table>

Class Participation and Professionalism:
Participation includes class attendance, professionalism, reading assigned materials, overall preparation for class, and actively contributing your thoughts and personal experiences. There are only excused absences permitted as you are expected to attend every class meeting. While your attendance is critical to the exchange of ideas and fruitful class discussions, you should note that attendance alone is not sufficient to score well on participation. You are expected to actively contribute to the learning experience of the class. Preparation, professionalism, and mutual respect are also important elements of your participation score.

A student who must be absent from a class session-pre-approval is required; you must keep me informed as to your out-of-class progress and expectations. However, you are responsible for all information, assignments, revisions, or announcements from a missed class. Arrange with your classmates measures
on the first day of class. Assignments due on the day of a missed class must be submitted prior to the start of the session in order to receive credit.

Late Work Will Not Be Accepted: Be sure to allow adequate time to resolve unanticipated problems with respect to course deadlines. Unless changed by the instructor, deadlines noted in the course schedule are firm. If assignments are handed in after the deadline the academic penalty will be half a letter grade on the assignment.

Academic Honesty
Academic honesty requires students to refrain from cheating and to provide clear citations for assertions of fact as well as for the language, ideas and interpretations of others that have contributed to their written work. Failure to acknowledge indebtedness to the work of others constitutes plagiarism, a serious academic offense that cannot be tolerated in a community of scholars. All instances of academic fraud will be addressed in accordance with the policies of the University.

Inclement Weather
Please contact 570-408-SNOW
Wilkes University Curriculum Committee  
COURSE CHANGE FORM

**Directions:** Use this form to change information relating to an existing course. Please note, changes to course number require separate course addition/deletion forms (not this form!). Only indicate changes that are proposed (existing and proposed), other fields should be left blank.

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing</td>
<td>FIN 319</td>
</tr>
<tr>
<td>Course Title</td>
<td>Financial Derivatives</td>
</tr>
<tr>
<td>Course Credit hours. (Indicate classroom, lab or “other” hours.)</td>
<td>NA</td>
</tr>
<tr>
<td>Course Prerequisites</td>
<td>ACC 162, BA 119, FIN 240, FIN 341, FIN 343</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing</td>
<td>MGT 257</td>
</tr>
<tr>
<td>Course Title</td>
<td>Management of Information Systems</td>
</tr>
<tr>
<td>Course Credit hours. (Indicate classroom, lab or “other” hours.)</td>
<td>NA</td>
</tr>
<tr>
<td>Course Prerequisites</td>
<td>ACC 162, BA 119, FIN 240</td>
</tr>
</tbody>
</table>

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