



The Stetson School of Business and Economics of Mercer University delivers career focused business education to develop entrepreneurial leaders and responsible global citizens.

Visual Reporting & Communication
BA 631 (M.S. in Business Analytics)
Fall 2020

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|----------------------|----------------------------------|
| Instructor: | Meng Xu |
| Email: | xu_m@mercer.edu |
| Office hours: | By appointment |
| Textbook: | No Required Textbook |
| Tools: | 1) Microsoft Excel 2) Tableau |

Catalog Course Description:

This is data visualization and communication of results. Topics will include but are not limited to visualization of data in the form of plotting, charting, and graphing. Students will use MS Excel, MS PowerPoint, and other visualization software. Students will learn how to communicate complex information and analyses in easy-to-understand visual and verbal communications.

Instructor's Course Description:

This course is designed to help you become a better communicator in a work setting, especially through visual charts and graphs that turn “boring” or “confusing” data into clear, easy-to-understand insights.

Many people struggle with the task of turning their unstructured thoughts and datasets into actionable, compelling visuals that tell a clear business story. In this course, you will learn some best practices for visual communication to craft insights into clear and compelling business stories that communicate at different levels of business audience with the help of analytics tools, such as MS Excel and Tableau.

Note that the focus of this course will be on the content of your class participation and work, not your public speaking skills.

Course Objectives:

This course is designed to help you:

- Become a better business “storyteller” with data
- Gain hands on experience with data visualization tools (Excel, Tableau, etc.)
- Create high-impact charts and graphs
- Understand the differences between insights and descriptions
- Identify “right” from “wrong” in visual formatting
- Adapt your message to different audiences
- Recognize the difficulty of communicating complex information

Attendance:

Full attendance at all class meetings, for the full length of the class period, is expected. This class has a strong emphasis on participation, and you do not get the full experience if you do not participate. Absences will lower your course grade because you will be unable to contribute to class discussion. If you know that you will be unable to attend one of the class sessions, please let me know as soon as possible.

Grading:

The course grade will be determined based on your performance on the following:

| | Points | Percentage |
|--------------------------|---------------|-------------------|
| Homework (4 Assignments) | 40 | 40% |
| Mid-term Project | 15 | 15% |
| Final Project | 25 | 25% |
| Class Participation | 20 | 20% |
| Total | 100 | 100% |

Grading Scale:

| Grade | Min Percent |
|--------------|--------------------|
| A | 94% |
| B+ | 86% |
| B | 80% |
| C+ | 75% |
| C | 70% |
| F | <70% |

Homework – 4 Assignments (10 points each, 40 points in total, 40% of total grade):

Homework assignments will be posted on Canvas and are due by 11:59PM on the Friday of Week 2, Week 3, Week 4, and Week 6. More details on each homework will be provided when assigned and will involve reading and/or exercises intended to provide you the knowledge and practice to create successful visualizations and communications.

Midterm Project (15 points, 15% of total grade)

For your Midterm project, you will work on a dataset that you are interested in, create a dashboard using Tableau, and present your findings and insights to the class. More information will be posted on Canvas and communicated in class.

Final Project (20 points, 20% of total grade)

For your final project, you will use your Financial Analytics class project, prepare data, create visualizations, develop insights, and deliver a final story presentation. More information will be posted on Canvas and communicated in class.

Projects are important to the course and require class attendance. **If you know that you will be unable to attend class on the day of the Mid-Term or the Final Project presentations, please inform me as soon as possible.** Aside from situations that have been discussed and approved in advance, students will only be permitted an extension on the due date in extreme circumstances.

Class Participation (2.5 points each class session, 20 points in total, 20% of total grade)

You are expected to actively participate in class discussions and attendance at online class sessions. This includes the content-oriented lecture-discussions, discussions about homework and projects presented by your classmates, and in-class hands-on application of concepts covered in lecture. Arriving late or leaving early may result in a reduction of your participation grade.

Please answer the open-ended question in Assignment on Canvas associated with each class. In your submission, clearly and concisely explain your class participation and/or your key takeaways from the class.

Your contributions will be graded during each class session in the following way:

- 0 – Did not attend class or negatively affected classroom discussion
- 1 – Attended class but did not contribute
- 2.5 – Contributed consistent, relevant, quality commentary

Course Evaluations

Course evaluations will be conducted via the online, university approved system during week seven of this course. All students are encouraged to participate when they receive the email notification.

Tentative Class Schedule and Topics

The course syllabus provides a general plan for the course; deviations may be necessary as the instructor sees fit.

| Week | Date | Schedule | Location | Topics | Deliverables |
|------|--------|----------|----------|---|-----------------|
| 1 | Oct 17 | 1-5pm | Class | - Course introduction - Visualization basics - MS Excel visualization | None |
| 2 | Oct 24 | 1-5pm | Virtual | - MS Excel review - Tableau introduction | Homework #1 |
| 3 | Nov 31 | 1-5pm | Class | - Tableau fundamentals with applications | Homework #2 |
| 4 | Nov 07 | 1-5pm | Class | - Dashboard design - Tableau dashboard | Homework #3 |
| 5 | Nov 14 | 1-5pm | Class | - Mid-term project presentations | Midterm Project |
| 6 | Nov 21 | 1-5pm | Class | - Storytelling | Homework #4 |
| | Nov 28 | N/A | N/A | HOLIDAY – Thanksgiving | |
| 7 | Dec 05 | 1-5pm | Virtual | - Class recap and next steps - Final project Q&A | None |
| 8 | Dec 12 | 1-5pm | Virtual | - Final project presentations | Final Project |

Mercer University Honor Code and Council (See Mercer catalog for more detailed information)

Mercer University Atlanta expects each and every student to maintain the highest principles of academic honesty and integrity. Violations of academic honesty represent a breach of the University's expectations and will be regarded as a serious matter. Violations include, but are not limited to, the following:

- Plagiarism - The use of ideas, facts, phrases, or additional information such as charts or maps, from any sources, without giving proper credit to the original author. Using direct quotations, paraphrases, or reproductions of any material which is not of the student's own authorship is also considered plagiarism. Failure to reference any such material used is both ethically and legally improper.
- Cheating: The use of unauthorized sources of information, signing the role sheet for another student, collaborating on assignments when no such collaboration is allowed, and making multiple submissions of an assignment in this course and other courses are examples (among others) of cheating.

Protocol for Electronic Submission of Course Work: Assignments are required to be turned in during class on the due date per the syllabus. However, in extreme circumstances if electronic submission is the only method that ensures the assignment is submitted on time, students bear sole responsibility for ensuring that papers or assignments submitted electronically to a professor are received in a timely manner and in the electronic format(s) specified by the professor. Students are therefore obliged to have their e-mail client issue a receipt verifying that the document has been received. Students are also strongly advised to retain a copy of the dated submission on a separate disk. Faculty members are encouraged, but not required, to acknowledge receipt of the assignment.

Disability Support Services: Disability Syllabus Statement for Atlanta, Douglas, Henry and Newnan

Students requiring accommodations or modifications for a disability should inform the instructor at the close of the first class meeting or as soon as possible. The instructor will refer you to the ACCESS and Accommodation Office to document your disability, determine eligibility for accommodations under the ADA/Section 504 and to request a Faculty Accommodation Form. Disability accommodations or status will not be indicated on academic transcripts. In order to receive accommodations in a class, students with sensory, learning, psychological, physical or medical disabilities must provide their instructor with a Faculty Accommodation Form to sign. Students must return the signed form to the ACCESS Coordinator. **A new form must be requested each semester.** Students with a history of a disability perceived as having a disability or with a current disability who do not wish to use academic accommodations are also strongly encouraged to register with the ACCESS and Accommodation Office and request a Faculty Accommodation Form each semester. For further information, please contact Richard Stilley (stilley_r@mercer.edu), at (678) 547-6823 or visit the ACCESS and Accommodation Office website at <http://atlstuaffairs.mercer.edu/disability-services.cfm>

Inclement Weather: Inclement Weather: If severe weather occurs, classes will be canceled in accordance with the Associate Provost's decision of Mercer-Atlanta. Call the Mercer weather phone for information about class cancellations—(678) 547-6111 (Atlanta) or listen to WSB 750 AM.

COVID-19 monitoring and protocols

Each member of the Mercer community must self-monitor daily and follow practices known to reduce the spread of the virus. Students are expected to perform a daily temperature check prior to attending classes and may be required to submit to a noninvasive temperature check upon arrival to class. If you experience symptoms or have tested positive for COVID-19, do not come to class, rather contact Mercer Medicine Hotline (478-301-SICK) for evaluation and direction. Absences related to COVID-19 monitoring and protocols are excused. Abbreviated direction on University COVID-19 protocols are found on the University protocols flyer.

Masking

Masks are required in all communal spaces within academic buildings. Masks, worn appropriately, are required during class unless otherwise directed by the instructor for safety. A student arriving to class or other related meetings without appropriate face covering or approved medical exemption will be directed to leave the classroom. Absences due to such dismissals are unexcused. Failure to follow appropriate masking requirements is a violation of the student code of conduct and will be reported accordingly.

Sanitation

Hand sanitizer is readily available in all campus facilities. Students are expected to sanitize their hands prior to entering classrooms and labs. Eating and drinking in instructional facilities is strictly prohibited. Cleaning supplies may be available to sanitize seats and desks prior to and after class meetings.

Class seating and social distancing

Classrooms have been adjusted to provide a protective degree of social distancing with masking. Student must adhere to designated seating and classroom arrangements must not be adjusted. Additionally, appropriate social distancing and compliance with University signage directions in hallways and common spaces during entry and exit is expected.

Notification of Course Recording

Course instruction may be recorded using Echo360 or Zoom and will only be available to students registered for the course who need accommodation. Such recordings may include your name, likeness, and participation in class. Recordings of instructional activities will be used solely for class purposes by the instructor and students enrolled in this course during the current semester. Course recordings may not be reproduced or shared in any way (including electronically or posting in any web environment) with those not in the class in this semester.

COVID-19 Excused Absences

Students are expected to observe the course attendance policy. Suspected COVID-19 symptoms, illnesses, or positive test result must be reported to the Mercer Medicine Hotline (478-301-SICK). Absences at the direction of Mercer Medicine to isolate will be excused. It is the responsibility of the student to notify the instructor of their absence and to follow the instructor's direction regarding virtual instruction, remote assignment, or make-up opportunity.