USCLeventhal
School of Accounting

ACCT 549 – Advanced Enterprise Systems & Technologies

Course Syllabus
Fall Semester 2015
Section 14216
Class Sessions – M & W: 11 am – 12:20 pm (JKP 104)

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Office Hours: M & W: 9 – 9:30 am / 4 – 5 pm; and by appointment

Course Description

This is an advanced course in enterprise systems strategy, business process design and enterprise accounting and reporting systems. Its focus is on the analysis, design and implementation of Enterprise Resource Planning (ERP) based financial and reporting solutions across a variety of industries. During this course, you will learn how organizations set enterprise application strategies, determine business requirements, and design systems to support the business requirements. Upon completion of this course, you will have the ability to define and execute a project to analyze, design and plan for the implementation of an enterprise accounting system solution that supports specific business needs. The research questions, deliverables and semester projects are designed to give you both a theoretical and practical understanding of: enterprise financial systems; project management; financial system requirements definition; financial system design; and system documentation requirements.

As you know, all organizations rely on information technology to conduct business. The result is companies making use of large scale / enterprise systems based on applications from vendors like SAP, Oracle, Sage, Infor, Microsoft, Workday, Workforce Software, Cornerstone OnDemand, and NetSuite. These systems cost millions of dollars and require sizable time commitments from management, employees and consultants to make them work. More importantly, these systems are used to capture operational and accounting data used to produce managerial and financial reports required for successful business management and regulatory compliance. Therefore, an understanding of these systems and how they are leveraged to support functional business processes is essential to anyone whose career involves: capturing business transactions in a complete / high-quality manner; ensuring business processes take place efficiency and with proper management control; and, providing information in way to support management / stakeholder decision making.

Please note, this course will be very 'hands-on' with the use of techniques and applications widely used today in auditing and advisory services. To document business process functions, you will use Microsoft Visio. To plan and budget your project you will use Microsoft Project and Excel. To better understand accounting data and how it is structured you will use Microsoft Access. In addition, to get a feel for the technology that sits behind enterprise systems and the complicated nature of their configuration we will leverage Oracle's PeopleSoft system. All in all, this class will take some work, but in the end you will be far better prepared to start your career than your firm colleagues from other backgrounds.

Learning Objectives

Upon completion of this course, you should be able to contribute meaningfully to an accounting, auditing or advisory team in the following ways:

- Describe how Enterprise Resource Planning (ERP) systems are utilized by global organizations by producing a strategic information system plan / roadmap for specific industry / business and presenting the results to the class for critical evaluation and comment.

- Analyze the major components of a global business and break them down into manageable business processes by documenting a conceptual design for a new ERP based computer system.

- Demonstrate the feasibility of an enterprise system project by producing a feasibility report for review and approval.

- Describe and execute the steps required to produce design specifications for enterprise level information systems by producing sample functional design documentation for reports, databases and system logic.

- Demonstrate how ERP systems impact organizational business process and controls by producing detailed documentation for databases and business processes, including appropriate management control points.

- Describe and apply the System Development Life Cycle to a global organization by producing a detailed project plan for an ERP implementation project.

- Understand and apply the steps required to complete an ERP based implementation project by developing and incorporating detailed project work schedules, project staffing budgets and software selection criteria.

- Define and describe in detail the technical requirements for an ERP based chart of accounts necessary to support management decision making at all levels by producing a future state chart of accounts design for an ERP based financial system.

- Compare the current state business processes of an organization to ERP best practices by producing future state business process maps, data models and configuration documentation.

- Demonstrate the ability to document system security and testing required for proper audit compliance by producing system security matrices, test plans and test cases.

- Compare system implementation project documentation to best practices by reviewing documentation and producing written audit observations / review notes in accordance with current industry standards.

- You will demonstrate the ability to work cooperatively and productively in groups of no more than six by completing a number of team assignments and evaluating your peers' performance over the course of the semester.

- You will understand and analyze system documentation by reviewing the documentation of another group and producing written audit observations / review notes.

To achieve these learning objectives, a combination of background reading and research, interactive discussion / lecture and your work on class deliverables will be utilized. Please note, the most important word in the sentence above is "interactive" as research on learning indicates it is very difficult to gain anything more than a superficial understanding of material without practice and feedback. Therefore, you should expect our class sessions to incorporate a substantial amount of both.

To demonstrate you achievement of the learning objectives stated above: 1) you will be required to demonstrate your knowledge by individually working problems when working in-class cases; and 2) you will be required to participate in completing group assignments throughout the semester.

Required Materials

The following software is available in the bookstore. In addition, Microsoft Office (without Visio) can be obtained by students through the ITS website at https://itservices.usc.edu/officestudents/.

- Microsoft Corporation's *Office Professional and Visio* (Other tools can be substituted as long as the instructor grants prior approval.)

A working familiarity with basic MIS concepts and computers is expected, as you should have completed at least one computer literacy and information systems course prior to entering this class.

Prerequisites and Recommended Preparation
Generally, the recommended preparation for this course is ACCT 547, which can be taken concurrently. However, the class is also appropriate for those who have completed a class in, or have a working knowledge of, general information systems.

Beyond some basic background knowledge in systems, regularly reading a general business periodical or newspaper will aid in your business education. To this end, the Wall Street Journal can be purchased at a discounted student rate at www.wsjstudent.com. In addition, regularly reading a variety of periodicals will aid in your accounting systems education. Also, as a group with some accounting background (e.g., a summer of intensive accounting education) and / or some work experience (e.g., internships or jobs), my expectation is you will incorporate any knowledge you acquired prior to this class in any answer you provide during class sessions and in competition of your course projects.

This is not a traditional 'read', 'lecture', 'practice problems' and 'test' class as this is not the way accomplished people in our line of business conduct their work. The accounting profession is too dynamic and requires too much resourcefulness for that learning method to result in the skills required for long-term career success. During client engagements or as a business executive, you will be continuously learning just to keep up. If you stick with accounting, advisory or executive management as a career base, you will be paid for your ability to: 1) gather information; 2) analyze situations; 3) develop a variety of potential solutions; 4) come up with a great answer; and 5) make it work! ☺

Course Notes
Distributed materials and other class information will be available through your Blackboard account.

Grading Policies
Your grade in this class will be determined by your relative performance on a pair of exams, a project acceptance presentation, project design documentation, a peer project evaluation, and class participation. The total class score will be weighted as follows:

	Points	Weight	
In-Class Case	100	30%	(Individual)
Project Presentation	10	10%	(Group)
Project Documentation	10	20%	(Group)
Peer Project Audit	10	25%	(Individual / Group)
Participation	10	15%	(Individual)

After each student's weighted total points are determined for the semester, letter grades will be assigned on a curve according to Marshall School of Business grading guidelines.

Final grades represent how you perform in the class relative to other students. Your grade will not be based on a mandated target, but on your performance. Historically, the average grade for this class is about a 3.3 (i.e., B+). Three items are considered when assigning final grades:

1. Your score for each of the items above weighted by the appropriate factor and summed.
2. Your overall percentage score for the course.
3. Your ranking among all students in the course(s) taught by your instructor during the current semester.

The grade of "W" is allowed only if a student withdraws after the third week but before the end of the twelfth week of the semester. The grade of incomplete (IN) can be assigned only if there is work not completed because of a documented illness or unforeseen emergency occurring after the 12th week of the semester that prevents the student from completing the semester. An "emergency" is defined as a serious documented illness, or an unforeseen situation that is beyond the student's control, that prevents a student from completing the semester. Prior to the 12th week, the student still has the option of dropping the class. Arrangements for completing an IN must be initiated by the student and agreed to by the instructor prior to the final examination. All work required to replace the IN with

a final grade must be completed within one calendar year from the date the IN was assigned. If the student does not complete the work within the year, the IN will automatically be converted to a grade of F.

Assignments and Grading Detail

Expectations regarding your performance on exams, acceptance presentations, design documentation and participation are as follows:

In-Class Case

There will be one in-class case. No makeups will be given and each must be taken at the scheduled time. For the case, you will be responsible for the research questions, lectures, class discussions and your project progress at the point of the exam. After each case is returned there is a one-week reflection period after which you will have one week to discuss your grade. Please be aware this discussion may result in an increase, decrease or no change to your score. After this time, grades on cases become final.

The in-class case dates for this fall are as follows:

| | Case I | Monday | November 16th |

Project Deliverables, Presentation and Documentation

There will be one semester long design documentation project and several deliverables. These must be done in teams consisting of four or five members as smaller teams have difficulty getting the work done while larger teams have difficulty getting together. The semester project will be culminate in a project acceptance presentation and a project binder that contains hard copies of the complete project design documentation (i.e., all of your team's deliverables created over the course of the semester). Although the deliverables are not individually graded, they are designed to provide you with an opportunity to complete parts of your final project while becoming familiar with a particular technology or technique.

You may select your own groups. However, people who are not in a group by the end of the sixth class will be assigned a group. Like any employment situation, these groups should not be considered permanent. If the group finds that it cannot continue to be productive, the group may "fire" anyone not performing by providing one-week notice to the person and copying me on the personnel action. People who are fired will not be able to change groups, but instead will be required to complete all remaining course work on their own. All group work completed up to the time of termination will be shared as of the date of separation.

Peer Project Audit

Your team will be expected to prepare a formal evaluation of another group's project at the end of the semester. This evaluation is a project review / audit that should provide actionable suggestions, or review notes, to the group whose project is being reviewed. "Individual" points are earned as the team's score is 'factored' by your team members' assessment of your contribution. The information is obtained from peer evaluation forms that must be turned in to me by close of business on the day the final exam is scheduled. The outcome is your score can be significantly different from the team score depending upon your team's evaluation of your contributions throughout the semester.

Please note:

1. All deliverables will be assessed / graded based on professional standards. This includes grammar, spelling, organization, neatness, and presentation. Under all circumstances your goal is to treat everything you do in this class as client oriented. This means that all deliverables should be prepared in a manner that would facilitate client review and acceptance (not just as a class assignment for your professor). You are approximately a year from doing this professionally, so you may as well get used to producing professional results. ☺

2. Deliverables are due at the end of the class period indicated in the attached schedule; no late deliverables will be accepted. All deliverables will be returned during class within a calendar week. Those materials not picked up in class will be available for pickup in the instructor's office, during normal office hours, until the end of the semester. Any materials not picked up by the end of the semester will be discarded after the last class session of the semester.

3. The instructor will retain all exams, final design documentation and peer evaluations for at least one semester following submission of the final course grade.

4. All work turned in or discussed during this class should be the work of the individual or team representing the work. In general, collaboration with students outside your team will be considered a violation of the honor code unless the instructor gives prior approval. On the other hand, consultation with appropriate professionals outside the university is encouraged.

Participation

In our profession, it is impossible to describe the importance of clear communication. On the other hand, signs of poor communication are easy to see: team members fail to speak up; team deliverables fail to meet expectations; project milestones fail to be achieved; client sponsors fail to pay bills and provide references to other clients; careers fail to continue… note the common theme. In short, active participation from each team member is essential. It is not enough to "make" every meeting and "help" with each deliverable. It is necessary for you to make things happen and for each group member to positively impact the overall result.

I consider participation one of the most important things you can do in this class (you can tell by the weight given it in the performance criteria). In this room, you should recognize that you are now part of multiple teams. The first team you belong to is the entire class. If you forget to ask an important question or miss an opportunity to contribute a critical idea it could degrade the classroom experience for everyone, including me. Your second team is your group. If you fail to show up and contribute to your group's work, it could result in a substandard project and / or grade. The third team is the smallest; it is made up of only you and me. If you don't show me what you know in class, there is no way you can earn credit for it. Note, although these "teams" have been listed in order of importance, it must be emphasized that if any of them break down it will endanger the overall success of the class and your grade

To help to facilitate participation, the first 10 to 15 minutes of each class will be set aside to discuss business strategies, enterprise technologies or general business processes. These discussions can arise from current events or as off-shoots of topics discussed during the normal class flow. Students are expected to take the initiative and lead a number of these discussions throughout the semester. Note, these are not meant to be formal presentations but rather a matter of simply raising questions and being prepared to discuss any related issues as part of the overall class learning experience.

In terms of grading, class participation will basically fall into three categories (this is not to say there will be only three grades, but very few people will fall outside the following categories). Category one, people that come to every class session, sit attentively, take wonderful notes and absorb everything said… If this is you, then you will earn no participation points. Category two, people that come to class every day and contribute something every couple of classes that helps us all (including me) become more knowledgeable about our field of interest and / or career… If this is you, then you will earn half the total participation points. Category three, people that come to class every day and contribute positively during every session… If this is you, then you will earn the maximum participation score. Note, it does not say "talks" anywhere in this paragraph, it says "contribute."

In order for you get feedback on your participation during the semester; please feel free to ask me how you are doing at any time. Just so you know, when you ask, my response will be to ask you how you think you are doing (accurate self-evaluation is extremely important to your long-term success). After you answer honestly, we can talk about my impressions and what you can do to improve your standing.

Overall Comment

Keep in mind this is a graduate level class. At a minimum, I expect you to bring the skills you have acquired, in both your accounting and other academic / work experience, with you. In this class we are going to use those skills to understand how accounting processes work in the business / industry you are working on.

Remember that managing enterprise technologies, from idea to inception, is as much art as it is science. It requires thoughtfulness and reasoning to achieve optimal results. In this class, you will not be told exactly what to do, as there are many good answers to the situations your companies face, but you will be guided as there are also many bad answers that can have severe consequences to the business you are trying to support. So, as long as you provide good input, we can work toward finding an optimal solution to the situation at hand.

As usual, the primary responsibility for your learning during this class belongs to you. In other words, the effectiveness of the skills you acquire from this class are directly correlated to the effort and thought you put into it.

Key Consideration

As with most things in life, this class is results oriented. We all know that a there will be time and effort necessary, but in the end it is the quality of the final output that will earn you your grade. Manage your time accordingly and never forget to produce high quality results. Also, remember to keep thinking about what you are going to do to obtain a sustainable competitive advantage over your competitors (not just here, but during your career as well).

<u>Learning Goals</u>

In this class, emphasis will be placed on the USC Leventhal School of Accounting graduate learning objectives as follows:

Objective	Title	Description	Course Emphasis
1	Technical, Conceptual, Problem-Solving Requirement	Students will be competent in and be able to apply discipline-specific knowledge and skills in the fields of enterprise systems. This learning outcome includes the development of critical thinking and problem solving skills, as well as an understanding of the strategic role of enterprise systems in business organizations and society.	High
2	Professional Development Requirement	Students will be able to communicate clearly, and strategically, after considering the relevant audience, situation, and purpose of the communication. Students will develop the ability to work productively with others to accomplish established goals.	Medium
3	Research / Lifelong Learning	Students will be able to use relevant research databases and academic / professional literature to gain new knowledge and analyze business situations.	High
4	Ethical Principles and Professional Standards	Students will be able to apply ethical principles and professional standards in analyzing situations and making informed decisions.	Low
5	Globalization and Diversity	Students will be able to demonstrate an international perspective and appreciation for diversity and cultural differences, along with their significance in global business.	Low

MARSHALL GUIDELINES

Add / Drop Process

Students may drop via Web Registration at any time prior to Friday, November 13th. Please note that if you drop after September 11th your transcripts will show a W for the class. Students may add the class as space becomes available via Web Registration through Friday, September 11th.
Dates to Remember:

Last day to add classes or drop without a "W"	Friday – September 11th
Last day to change enrollment from P/NP to Letter Grade	Friday – October 9th
Last day to drop with "W"	Friday – November 13th

Retention of Graded Coursework

Graded work that has not been returned to you will be retained for one year after the end of the semester. Any other materials not picked up by the end of the semester will be discarded after final grades have been submitted.

Technology Policy

Laptop and Internet usage is not permitted during academic or professional sessions unless otherwise stated by the professor. Use of other personal communication devices, such as cell phones, is considered unprofessional and is not permitted during academic or professional sessions. Upon request, all electronic devices in your possession (e.g., cell / smart phones, tablets, laptops, etc.) must be completely turned off and / or put face down on the desk in front of you. In addition, at certain times (i.e., during exams), you might also be asked to deposit your devices in a designated area in the classroom. Video recording of faculty lectures is not permitted due to copyright infringement regulations. Audio recording is only permitted if approved in advance by the professor. Use of any recorded or distributed material is reserved exclusively for the USC students registered in this class.

Recordings

No student may record any lecture, class discussion or meeting with the professor without the professor's prior express written permission. The word "record" or the act of recording includes, but is not limited to, any and all means by which sound or visual images can be stored, duplicated or retransmitted whether by an electro-mechanical, analog, digital, wire, electronic or other device or any other means of signal encoding. The professor reserves all rights, including copyright, to lectures, course syllabi and related materials, including summaries, PowerPoints, prior exams, answer keys, and all supplementary course materials available to the students enrolled in this class whether posted on Blackboard or otherwise. They may not be reproduced, distributed, copied, or disseminated in any media or in any form, including but not limited to all course note-sharing websites. Exceptions are made for students who have made prior arrangements with DSP and the professor.

Statement for Students with Disabilities

Any student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester. A letter of verification for approved accommodations can be obtained from DSP. Please be sure the letter is delivered to me as early in the semester as possible. DSP is located at 3601 Watt Way (GFS 120) and is open 8:30 a.m. – 5:00 p.m., Monday through Friday. The phone number and email address for DSP are (213) 740-0776 and ability@usc.edu respectively. For more information visit http://dsp.usc.edu/.

Statement on Academic Conduct and Support Systems

USC seeks to maintain an optimal learning environment. General principles of academic honesty include the concept of respect for the intellectual property of others, the expectation that individual work will be submitted unless otherwise allowed by an instructor, and the obligations both to protect one's own academic work from misuse by others as well as to avoid using another's work as one's own. All students are expected to understand and abide by these principles. *SCampus*, the Student Guidebook, (www.usc.edu/scampus or http://scampus.usc.edu) contains the University Student Conduct Code (see University Governance, Section 11.00), while the recommended sanctions are located in Appendix A.

Students will be referred to the Office of Student Judicial Affairs and Community Standards for further review, should there be any suspicion of academic dishonesty. The Review process can be

found at: http://www.usc.edu/student-affairs/SJACS/. Failure to adhere to the academic conduct standards set forth by these guidelines and our programs will not be tolerated by the USC Marshall community and can lead to dismissal.

Academic Conduct

Plagiarism – presenting someone else's ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in SCampus in Section 11, Behavior Violating University Standards (https://scampus.usc.edu/1100-behavior-violating-university-standards-and-appropriate-sanctions/). Other forms of academic dishonesty are equally unacceptable. See additional information in SCampus and university policies on scientific misconduct (http://policy.usc.edu/scientific-misconduct/).

Discrimination, sexual assault, and harassment are not tolerated by the university. You are encouraged to report any incidents to the Office of Equity and Diversity (http://equity.usc.edu/) or to the Department of Public Safety (http://capsnet.usc.edu/department/department-public-safety/online-forms/contact-us). This is important for the safety whole USC community. Another member of the university community – such as a friend, classmate, advisor, or faculty member – can help initiate the report, or can initiate the report on behalf of another person. The Center for Women and Men (http://www.usc.edu/student-affairs/cwm/) provides 24/7 confidential support, and the sexual assault resource center webpage (sarc@usc.edu) describes reporting options and other resources.

Support Systems

A number of USC's schools provide support for students who need help with scholarly writing. Check with your advisor or program staff to find out more. Students whose primary language is not English should check with the American Language Institute (http://dornsife.usc.edu/ali), which sponsors courses and workshops specifically for international graduate students. The Office of Disability Services and Programs (http://dsp.usc.edu/) provides certification for students with disabilities and helps arrange the relevant accommodations.

Emergency Preparedness / Course Continuity

If an officially declared emergency makes travel to campus infeasible, USC Emergency Information (http://emergency.usc.edu/) will provide safety and other updates, including ways in which instruction will be continued by means of blackboard, teleconferencing, and other technology. USC's Blackboard learning management system and support information is available at blackboard.usc.edu.

For additional information, you may use any of the following:

USC Emergency – (213) 740-4321
USC Emergency Information – (213) 740-9233
USC Information – (213) 740-2311
KUSC Radio – 91.5 FM

Schedule of Classes

Session	Date	Topic	Research Question Preparation	Target Deliverable
1	8/24	Course Introduction		
2	8/26	Functional Basics	What is an enterprise system, who uses it and why?	Business / System Mapping
3	8/31	Technical Basics	What are the components make up an enterprise system?	System Architecture
4	9/2	Planning Overview	What major steps should you go through to make sure the project goes well and how do they help?	High-level Scope, Methodology (SDLC) & Budget
5	9/9	Project Feasibility	How do you know if this will work?	Feasibility Study
6	9/14	Industry Presentation	Tell us about an interesting technology impacting corporate decision makers in business today.	**Deliverable 1***
7	9/16	Project Planning Meetings	Tell me about your organization's industry, current situation, and your plan to help them.	
8	9/21	Project Planning Presentation	Tell the class what you told me last Wednesday.	**Deliverable 2***
9	9/23	Analysis Techniques	How do you develop user / business requirements?	Data Flow Diagrams **Deliverable 3***
10	9/28	Report Design	What are people depending upon the system to produce?	Report Design
11	9/30	Database Design I	How do we model the enterprise database?	Entity Relationship Diagram **Deliverable 4***
12	10/5	Database Design II	What kinds of details should be included in the database?	Data Dictionary
13	10/7	System Processing	How will the system work?	System Flows
14	10/12	Functional Design Meetings	Tell me about your project: what you're doing; why you're doing it; and the benefits you're expecting.	**Deliverable 5***
15	10/14	Functional Design Presentation	Tell the class what you told me on Monday.	**Deliverable 6***
16	10/19	Detailed Planning	How do you track the project milestones and tasks?	Project Plan
17	10/21	Project Budgeting	How do you set up and track the project costs?	Project Budget
18	10/26	System Selection	How will you determine which system to use?	Demonstration Script **Deliverable 7***
19	10/28	Chart of Accounts Design	What organizational attributes should we track?	Chart of Accounts Design
20	11/2	Order-to-Cash Design	What needs to be addressed when setting up the revenue cycle?	Technical Design
21	11/4	Procure-to-Pay Design	What needs to be addressed when setting up procurement cycle?	Technical Design **Deliverable 8***
22	11/9	System Security	How do you develop and document security requirements?	Security Matrix
23	11/11	Project Validation Meetings	Tell me about your solution design.	**Deliverable 9***
24	**11/16**	**In-Class Case**		
25	11/18	System Testing	How do we ensure the system works as designed?	Test Planning / Cases
26	11/23	Business Case Review	What should you have done?	Updated Documentation **Deliverable 10***
27	11/30	Solution Design Presentation*		
28	12/2	Solution Design Presentation*		Solution Documentation*
Final	**12/9**			**Project Audit Findings***

* Description on following pages.

Deliverables

Component deliverables are:

1. <u>Industry Presentation</u> – Performed on a group basis (no more than three to a group) with the overall objective of providing an informal three-minute review of an enterprise technology that positively impacts businesses in one or more of the following industries: product or service distribution, financial services, healthcare, or public sector. The idea is to pick the industry you are interested in focusing on for the semester and learning something about a technology that is used to support managers in that industry. The best presentations will be given first choice of industry for the semester projects.

2. <u>Project Proposal Overview</u>. A four-page summary of your anticipated project. Included should be: 1) identification of your target client and three key high-level issues / opportunities / directives the company is facing; 2) determination of a high-level / conceptual solution to the items you've identified; 3) the proposed work effort that you believe will be necessary to help them determine and implement a detailed solution; and 4) a budget estimate detailing the costs of your services for the duration of the project. Additional documentation you consider appropriate can be submitted at this time in the form of appendices.

3. <u>Project Presentation</u> – A five-minute presentation that addresses the key business functions your project will cover, anticipated project benefits, the work effort required to achieve the benefits, and the estimated cost of your services. Beyond the items listed above, the presentation should cover why this is important to the organization, any competitive advantages the client might realize with regard to key competitors and any potential organizational ramifications resulting from the changes you suggest (e.g., regulatory, budget, political, etc.). (In all presentations, you should behave as if presenting the material to the organization's executive body.)

4. <u>Feasibility Study and Conceptual Design</u> – A report that details the overall feasibility of your project, including its: Scope, objectives, assumptions, risks / mitigations, and recommendations as discussed in class. In addition to feasibility, you should also include a high-level data flow diagram for each of the functional areas of the business covered by your project.

5. <u>Key Report Design and Data Model</u> – Detailed design for two key management reports (i.e., one strategic and one operational) and the entity relationship diagram(s) and supporting data dictionary to support the collection, storage and ultimate delivery of the required information to management. At a minimum, the data dictionary should identify all tables and appropriate field attributes (e.g., field name, field description, field type, field length, key field, required, source, validation / formatting requirements) suggested by the data model executed in Microsoft Access.

6. <u>Functional Design Presentation</u> – A five-minute presentation detailing selected elements of your design for a new information system for your client. Included may be: your design (both from a conceptual business and a system perspective) for new business processes; example reports that can be leveraged to improve management decision making; and improvements to organizational data structures that will support improved data analytics for organizational decision makers.

7. <u>Detailed Project Plan and Budget</u> – A plan for all tasks associated with the system implementation you are proposing, from initial project setup activities to project wrap-up and close out, and a matching budget to cover all professional services and related expenses associated with the implementation project.

8. <u>Chart of Accounts Design</u> – The basis for financial reporting for your organization. It should identify all relevant characteristics used for reporting by your business and the assignment of those characteristics to appropriate tables / fields using Oracle's PeopleSoft financials as a target technology.

9. <u>Business Process Maps and Data Mappings</u> – Documentation of the new business process within the system. Appropriate PeopleSoft business process maps should be identified and updated for your process design. In addition, your data should be mapped to PeopleSoft delivered tables / fields for conversion purposes.

10. <u>Security Matrices</u> – Documentation for required system security setup and evaluation that can be used to identify appropriate controls and limit unauthorized / high risk system access.

Project deliverables are:

<u>Deliverable Presentation</u> – A six-minute presentation that highlights the important and unique deliverables that resulted from your project. Of particular interest are: the new business functionality you have designed; the anticipated benefits your client should realize; the quality of the reports and flexibility of the data structures you designed to support both management decision making and analytics; and, the timing and cost of your project.

<u>Design Documentation</u> – All client ready documentation for the deliverables above. You will receive extensive feedback on your work throughout the semester. This feedback should be considered and your deliverables modified for inclusion in the final design documentation binder. In addition to the above, you will provide an executive summary and supplementary narratives that both explain the choices you made throughout the project and describe the anticipated benefits to the organization. In short, the final documentation should explain not only what you did, but why you did it and how will it help. The result should be a comprehensive set of analysis and design documentation that demonstrates competent use of the techniques you practiced throughout the semester.

<u>Project Audit Findings</u> – A thorough review and evaluation of another group's project resulting in a professional set of review notes and executive report / memo. Although this will be done as a group, you will be asked to rate your peers on their performance during the semester. These ratings will have a direct impact on the final grade of the students in your group.