

ACC245: S01
Bloomberg & Excel Certifications
School of Business

Fall 2024

Baldwin Wallace University

Domanski

Welcome to the Bloomberg and Excel certifications course! The class will meet on selected dates in Kamm 139, and rest of work will be completed online. Meeting dates: Aug 26, Aug 28, Sep 4, Sep 9, Sep 11, Sep 16, Sep 18, Sep 23, Sep 25, Sep 30, Oct 2, Oct 7, Oct 9, Oct 14, Oct 16, Oct 23, Oct 28, Oct 30, Nov 4, Nov 6, Nov 11, Nov 13, Nov 18, Nov 20, Nov 25, Dec 2, Dec 4

Course Description

This course is focused on preparing students for Bloomberg and Excel functionality used in accounting and finance fields. There are three distinct components for the course: Bloomberg, Excel, and a project integrating the concepts learned in Bloomberg and Excel. Students will gain a conceptual as well as practical understanding of Excel spreadsheets to prepare for the accounting and finance fields. In addition, students will gain significant experience with Bloomberg terminals, which provide seamless access to financial, economic, accounting, and legal data, as well as news.

Course Goals

1. Expose students to Bloomberg terminals used in trading rooms worldwide.
2. Prepare students for the accounting and finance fields where Excel knowledge and skills are both common and expected.
3. Prepare students for higher level of accounting and finance classes where knowledge of both Excel and Bloomberg terminals is expected.

Student Learning Outcomes and Objectives

1. Receive an Excel certification.
2. Receive a BMC (Bloomberg Market Concepts) certification.
3. Be able to manipulate the Bloomberg keyboard and quickly find individual securities, indices, or other data.
4. Learn the language of finance and accounting and gain practical knowledge about financial markets.

Important Info:

Office: Knowlton 216

Office Hours: MW 1:00 - 2:00 pm by appt. only

Email: jdomansk@bw.edu

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5. Be able to demonstrate their Excel skills to represent, summarize, and analyze data.
6. Be able to apply advanced Excel topics such as pivot tables, macros, and VBA.
7. Complete a project to demonstrate their knowledge in Excel and Bloomberg.

Required Materials

1. Account at Iactonline.com: you will use this account to complete the Excel component for this course. The current cost is \$30 per student for the semester and the cost will be billed directly to your student account.
2. Bloomberg account: you will create a Bloomberg login, which will allow you to access the necessary data to complete the second and third component of this course. There is no fee to create this account.
3. Bloomberg account for BMC: you will create another account to complete the BMC certification, which is part of the second component of this course. There is no fee to create this account.

A separate handout will be provided with the details on how to create these accounts. This information is also available in Canvas.

Course Requirements

Your course grade will be based on the following activities:

A. Iact Excel Modules Certification	= 20%
B. BMC Certification	= 10%
C. Assignments	= 60%
D. Attendance & Discussions	= 10%

Iact Excel Modules Certification: All **seven** Excel modules must be **successfully** completed by specific due dates to score **full credit** of 20%. **Successful completion** of an Excel module requires receiving a passing score of **85 points** or higher out of a total of 100 points in **each assessment test** for an **overall minimum total score of 85% for the entire module. If you do not complete any module or fail to score a minimum of 85% by the due date, a penalty of 1 point out of 3 for each late week will be applied to the specific Excel module.** You have an option to **retake** the exams in any Excel module with **unlimited attempts** in order to pass this course. See course schedule for relevant due dates.

ALL SEVEN EXCEL MODULES MUST BE COMPLETED BY SCORING A MINIMUM OF 85% IN ORDER TO PASS THIS COURSE!!!

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BMC Certification: There are four modules, which must be successfully completed by the specific deadline. **Successful completion** of BMC requires a minimum score of **60%** in each module to receive full grade credit of (10%). **If you do not complete the assignment by the due date, you will have an additional week to complete it, but you will receive only 50% of your score. If you complete BMC beyond the grace period, you will receive 0 points but would satisfy this criterion in order to pass this course.** Failure to use class code during registration will cost you 1%.

BMC CERTIFICATION MUST BE SUCCESSFULLY COMPLETED BY SCORING A MINIMUM OF 60% IN EACH MODULE IN ORDER TO PASS THIS COURSE.

Assignments: Assignments will require the use of Bloomberg Terminals or Excel, which must be completed by the specific deadline. **Late homework assignments** will receive a **deduction of 2 points per week out of 10 for each late week.** Note that some of the assignments can be completed only on Bloomberg terminals. Therefore, plan your schedule accordingly and submit the assignment well ahead of time.

Attendance and Discussions: We meet on select dates. For each absence, you will lose 1% of your grade unless you have received prior approval from me. Therefore, attendance in class is mandatory. Missing three or more class mandatory sessions will result in an F grade for this course.

Discussion activity would cover both Bloomberg and Excel topics. Late submissions will not be accepted, and you will earn zero points for the specific submission. Specific instructions pertaining to a discussion question will be provided.

Grading

Letter Grade	Percentage	Letter Grade	Percentage
A+	97-	C+	77
A	93	C	73
A-	90	C-	70
B+	87	D+	67
B	83	D	63
B-	80	D-	60

All grades will appear on Canvas. The final distribution of grades may be adjusted to reflect an appropriate distribution.

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Course Structure and Policies

Academic policies and BW health standards for the fall 2023 semester have been linked in the **Academic Affairs** tab (<https://bw.instructure.com/courses/7115/pages/academic-affairs>) in the **BW Campus Resources** course (<https://bw.instructure.com/courses/7115course>) in Canvas. Please visit sites for additional detail.

Course Schedule & Deadline Checklist

Note: In order to **pass this course**, it is mandatory to successfully complete both Iact Excel Module Certification and BMC Certification. Below are the requirements for successful completion:

Excel Module	Module description	Due date, 11:59pm	Passing score
1	Foundations	10/30/2024	85%
2	Charts	11/06/2024	85%
3	Formulas and Functions	11/13/2024	85%
4	Analyzing Data	11/20/2024	85%
5	Pivot Tables	11/27/2024	85%
6	Reporting & Protection	12/04/2024	85%
7	Macros & VBA	12/11/2024	85%
BMC Certification	Core Concepts: Description	Due date, 11:59pm	Passing score
1	Economic Indicators	09/18/2024	60%
2	Currencies	09/25/2024	60%
3	Fixed Income	10/02/2024	60%
4	Equities	10/09/2023	60%

Note: Due dates for all other work is available separately (in Canvas). Any changes in the schedule will be posted in Canvas. Retaking BMC courses is now prohibited. 3 additional courses are now in the program and can be completed if a passing score of 60% is not achieved in any of the core concept courses listed directly above.

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Incomplete (I) Grades

A notation of "I" indicates that a student has not completed all course requirements as a result of circumstances judged by the instructor to be beyond the student's control. A student must complete all course requirements no later than the end of the sixth week of the academic term following the semester in which the "I" was noted. Failure to complete such requirements will result in an "F" (failing) grade. Failure to complete the BMC Certification Program courses with a grade of 60% or higher or the iact Excel Certification Program courses with a grade of 85% or higher will result in an "F" (failing) grade.

Academic Integrity Statement

Academic honesty is always expected. Academic dishonesty includes claiming someone else's work as your own (e.g., plagiarism), seeking an unfair advantage over other students in taking a test or fulfilling an assignment, and fraud. Any offense will result in a zero or grade of F for the exam or assignment in question and may result in failure of the course. Infractions will be reported to the student's advisor and to the provost. The complete Academic Honesty Policy can be found at Academic Affairs- Jacket Connect.

Accessible Education Statement

Baldwin Wallace University is committed to providing all students equal access to learning opportunities. Students who have a diagnosed disability (e.g. mental health, attentional, learning, vision, hearing, physical or systemic) and would like to determine if they are eligible for reasonable accommodations should contact the Office of Accessible Education at (440) 826-2090 or disability@bw.edu. Additional information about how to get connected with OAE is available at: www.bw.edu/accessible-education.

BW Sexual Misconduct Reporting

BW is committed to a safe campus free from discrimination, harassment, and violence, and takes every allegation of misconduct seriously. When a student or employee reports to BW that they have been a victim of dating violence, domestic violence, sexual assault, or stalking, whether the offense occurred on or off campus, the institution will provide the student or employee with a written explanation of the student's or employee's rights and options, as well as resources and services.

All faculty and staff of Baldwin Wallace University are mandatory reporters of sexual

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misconduct (excluding staff in Health Services and Counseling Services and the University Chaplain, who provide confidential services). Mandatory reporters are required to report any disclosure of sexual misconduct – including but not limited to sexual harassment, sexual assault, dating and domestic violence, and stalking – to the Title IX Coordinator, who will preserve the privacy of those involved. BW's Nondiscrimination Policy and Procedures can be found at <https://www.bw.edu/Assets/policies/policy-equal-opportunity-harassment-nondiscrimination.pdf>.

To report discrimination or sexual misconduct, or to seek University resources and response (including supportive measures), please complete the online report form at: <https://fs22.formsite.com/bwtest1/form120/>

Center for Academic Success & Achievement (CASA)

CASA supports and strengthens the academic experience of BW's diverse community through resources designed to empower learners. We offer services to build reading, writing, and learning skills necessary for your BW coursework.

Individual Services: Work one-on-one with professional staff or peer tutors by making in-person or virtual appointments for Academic Coaching, Individual Tutoring, Reading Support, and Writing Support.

Group Services: Engage with a community of learners by visiting Drop-In Tutoring or participating in Success Seminars.

Online Services: When CASA staff and tutors are unavailable, BW students have 24/7 access to Brainfuse online tutoring and writing lab.

Visit CASA to study independently, meet with a tutor, or attend a workshop. Go to jacketconnect.bw.edu/CASA to book appointments, view event schedules, and access online resources. Contact us by phone (440-826-2425), email (casa@bw.edu) or stop by to see us on the top floor of Ritter Library to learn how we can help enhance your academic performance.

Concussion Management Statement

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Baldwin Wallace University is committed to the academic success and well-being of students who have suffered a concussion, closed head injury, or traumatic brain injury. If you believe you are suffering from a concussion or other type of head injury and are not a student-athlete, please report to the Health Center on campus for initial examination and potential diagnosis. If you are a student-athlete and have been diagnosed with a concussion during a sports-related activity, please follow up with your athletic trainer. To effectively manage and treat symptoms, while you simultaneously attempt to successfully engage in academic coursework and activities, additional services may be recommended by personnel in the Baldwin Wallace University Speech Clinic and the Office of Accessible Education

Counseling Services

Your mental health matters. College offers opportunities for growth and challenges. If you're feeling overwhelmed, anxious, or struggling with personal issues, know that Counseling Services is here to help. BW offers a range of free, confidential mental health resources to support your well-being and success; learn more about range of services at <https://jacketconnect.bw.edu/counselingservices/home/> or contact us directly at 440-826-2180 to make an appointment Virtual counseling is available at <https://app.timelycare.com/auth/login>. Additionally, the 24/7 BW Counselor on Call can be reached at 440-260-4399 for immediate support. Taking care of your mental health is a proactive step towards achieving success both inside and outside the classroom.

Crisis/Emergency Notification Process

While students are expected to attend class regularly and consult their class syllabus regarding specific absence policies for each class, sometimes unforeseen circumstances arise. The Crisis/Emergency Notification process and form is a tool developed for BW students who are experiencing a crisis or emergency and need an expedient way to notify faculty of their absence. The process is activated using a link on the One Stop page at <https://www.bw.edu/onestop/forms/>.

Dropping a Course

Students may drop minimester courses by Wednesday of the first week and full semester courses by Friday of the first week of the term. Courses dropped prior to these deadlines will not appear on a student's transcript and part-time students will not incur any tuition charges. Drops may be made directly from the Student Planning tool.

Petition for a Late Withdraw

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Students with extenuating circumstances may Petition to Withdraw from the current term after the deadline to withdraw from a course. The Petition to Withdraw Form is available on the Registration & Records site. Petitions to Withdraw after the scheduled deadline include withdrawing from all courses in which a student is enrolled. Only in rare circumstances will the committee authorize a partial withdrawal. Petition to Withdraw Forms must be submitted to the Registration & Records Office prior to finals in the current semester for the courses involved.

Religious Accommodations

Baldwin Wallace University prohibits discrimination on the basis of religion and values the diversity of the University community, including diversity of religious practices. The basis of this policy is to outline reasonable requests for “accommodations,” defined as exceptions to policies or practices for students or employees granted to follow their religious beliefs or practices.

Religious practices and academic or work requirements may result in a need for accommodation on a per-case basis. Consistent with Title VI and Title VII of the U.S. Civil Rights Act of 1964, Baldwin Wallace University will grant reasonable accommodations of religious observances unless the accommodation would impose undue hardship on the operation of the department or office. A multi-faith calendar of observances ([external link](#)) may be found on JacketConnect.

Some examples of reasonable accommodations include:

- Observation of major religious events that conflict with class or work hours – excused absence; designated note-taker; adjusted due date or exam date
- Prayer – quiet or private space; excused absence for a specific time or day
- Dietary requirements – providing alternative food; permitting food/drink in class
- Fasting – rescheduling exams set to occur during fasting
- Religious attire – permitting head coverings, facial hair, etc.

An accommodation is not reasonable if it creates a direct threat to the health or safety of others; disrupts instruction, academic integrity, learning, or university operations; creates undue hardship on a department or office; or requires substantial alteration to the way instruction is delivered, students or employees are assessed, or services are provided. Religious accommodations should not have an unreasonable impact on faculty workload, academic standards, or student instructional hours.

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Students seeking religious accommodations should first request religious accommodations directly from their professor or other person in a position to grant the accommodation, under the following guidelines:

- Students should take their religious calendar into account when making their course schedules, especially when considering classes that meet only a few times or for a short period of time.
- Students should consult their professor or supervisor during the first two weeks of the semester about requests for religious accommodations for the semester. Failure to provide reasonable notice is not basis for refusal of accommodation but might affect available accommodations.
- Students and faculty/staff should work together to determine the reasonable accommodation. When support is needed to facilitate accommodations requested by students, the provost will determine reasonable accommodations to address conflicts between a person's religious belief or practice and their courses. For questions about this policy or religious accommodations, please contact the Director of Spiritual Life at 440-826-2426 or in the Lindsay-Crossman Chapel. The Chief Diversity and Inclusion Officer will provide consultation, as needed.

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Student Resource Center

It can be challenging to do your best in class if you have trouble meeting basic needs like safe shelter, sleep, and nutrition. If you have difficulty affording groceries or accessing sufficient food to eat every day, if you do not have access to appropriate technology for class, or if you lack a safe and stable place to live, please contact BW Financial Aid and the Brain Center Student Resource Center. This center provides one-on-one support, basic needs resources, and referrals to other BW services to ensure you can persist in your academic endeavors. Programs include Swipe Out Hunger, Emergency Grant Program, Campus Cupboard and more.

Technology Requirements

All BW students are required to have a laptop or tablet computer that meets the specified requirements for their selected program of study. (Tech Requirements Guide) A broadband Internet connection, webcam, and microphone are also required for remote instruction (blended or online course delivery). Students who cannot meet these requirements should contact BW's Office of Financial Aid to seek assistance.

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Withdrawing from a Course

Following the drop period, students may withdraw from a minimester course during the first 4 weeks of the term and first 9 weeks for a full semester course. See the Academic Calendar for exact dates. Any possible tuition refunds will be based on the Bursar's tuition refund schedule. Add/Drop Forms can be found on the Registration & Records site. Courses withdrawn will appear on a student's transcript with a W grade.

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