



Accounting  
Technicians  
Ireland

# PROFESSIONAL CERTIFICATE IN DATA MANAGEMENT FOR FINANCE

ON DEMAND







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# PROGRAMME AIMS OF THE PROFESSIONAL CERTIFICATE IN DATA MANAGEMENT FOR FINANCE

This programme will update you on all of the major changes to the ATI curriculum that have occurred since you qualified ensuring your knowledge and expertise continue to be on par with all seasoned members and new graduates. Fellows, Members and Affiliate Members who commenced study prior to 2020 have completed the old syllabus and will not have directly gained knowledge in Financial Data Management. Here are some reasons why this programme will of interest to you:

- Would like to update on recent developments relating to the Financial Reporting environments,
- Would like to know and understand more about the evolving technological environment as it increasingly affects Accounting Technicians,
- Would like to know and understand more about the sustainability agenda as it affects the work of Accounting Technicians,
- Would like to know and understand more about the personal skills that are increasingly valued in the workplace,
- Would like to develop or improve practical problem-solving capabilities in an Excel environment.

## ADDITIONAL INFORMATION

The Programme will consist of hour long pre-recorded modules running on demand. In order to progress to the Level 8 Technologist Degree Programme in October 2023, members who commenced studying prior to 2020 must complete this programme as a pre-requisite (subject to other application criteria).

This programme will be supplemented by 6, 1 hour Advanced Excel CPD courses taking place as part of our CPDlive series of webinars. The 6 Excel CPD sessions are a pre-requisite to attending the Case Study modules of this programme. These Excel modules will be made available to all who register for this programme.

In addition each module will have required pre-course and post course work. This is all available to participants via MyCPD.



## HOW TO BOOK

The programme is available OnDemand and can be purchased through members Touchpoint portal. It can be completed in a self paced manner at times that suit each participant.

This programme is available to members at a subsidised total cost of €300/£265.

## OVERVIEW OF CONTENT

| Professional Certificate in Data Management for Finance |  |
|---|--|
| <b>MODULE 1</b>   | Personal Effectiveness in the Workplace PART 1                     |
|   | Personal Effectiveness in the Workplace PART 2                     |
| <b>MODULE 2</b>   | Sustainability and Social Responsibility PART 1                    |
|   | Sustainability and Social Responsibility PART 2                    |
| <b>MODULE 3</b>   | The Evolving Technological Landscape for Accountancy Professionals |
| <b>MODULE 4</b>   | Data Management, Big Data, and Data Analytics PART 1               |
|   | Data Management, Big Data, and Data Analytics PART 2               |
| <b>MODULE 5</b>   | Introduction to Statistical Techniques PART 1                      |
|   | Introduction to Statistical Techniques PART 2                      |
| <b>MODULE 6</b>   | Practical Advanced Excel Case Study 1                              |
|   | Practical Advanced Excel Case Study 2                              |
|   | Practical Advanced Excel Case Study 3                              |

## CRITERIA FOR COMPLETION

All participants are required to complete the full 6 module programme. Upon successful completion of the certificate programme, participants are awarded:

- 12 hours of CPD
- Accounting Technicians Ireland's Certificate of Participation
- Progression pathway to Accounting Technologist Level 8 Degree Programme

# DETAILED SYLLABUS AND LEARNING PLAN

## MODULE 1

### Personal Effectiveness in the Workplace PART 1

- Outline the characteristics of each of 'education', 'training', and 'development'
- Explain the organisational training and development process: needs, objectives, design, delivery, validation
- Describe the benefits of training and development in the workplace
- Outline the roles of human resources and training managers in the process
- Explain the nature of effective time management
- Outline the barriers to effective time management and how to overcome them

### Personal Effectiveness in the Workplace PART 2

- Describe the ways in which individuals and teams can be ineffective in the workplace
- Describe how ineffectiveness affects overall organisational performance
- Explain the role of information technologies in improving personal effectiveness
- Identify situations in which conflict arises in the workplace
- Explain how conflict affects personal and organisational performance
- Outline the ways in which conflict within organisations can be managed





## MODULE 2

### Sustainability and Social Responsibility PART 1

- Describe the evolution of sustainability as an increasing global societal concern
- Outline the United Nations' 17 sustainable development goals
- Give examples of how the UN's sustainable development goals affect the work of an accountancy professional
- Explain the emerging role and objectives of the International Sustainability Standards Board (ISSB)

### Sustainability and Social Responsibility PART 2

- Explain the growing demand for high quality, transparent, reliable, and comparable reporting by entities on climate and other environmental, social and governance (ESG) matters
- Explain the nature and objectives of integrated reporting
- Outline the main features of the planned sustainability-related standards that are intended to disclose information about sustainability-related risks

## MODULE 3

### The Evolving Technological Landscape for Accountancy Professionals

- Describe the evolution from manual to computerised accounting systems
- Describe the common roles of spreadsheet applications, database systems, accounting software applications
- Explain cloud computing as an accounting capability
- Describe the evolving technological environments that are applicable to the work of accountancy professionals
- Outline the internal control and security implications of emerging technologies
- Explain how the roles of accountancy professionals are evolving in response to technological developments



## MODULE 4

### Data Management, Big Data, and Data Analytics PART 1

- Describe three main sources of organisational data – transaction, social, sensor
- Explain how data can be organised (structured/semi-structured/unstructured)
- Outline the nature and characteristics of big data
- Outline the use cases and statistical power of big data and data analytics
- Describe the opportunities and threats associated with the emergence of big data for business organisations

### Data Management, Big Data, and Data Analytics PART 2

- Describe basic data visualisation techniques
- Explain how data analytics and visualisation tools assist the work of accountancy professionals
- Outline the ethical issues associated with big data, data visualisation and data analytics (including data protection issues)

## MODULE 5

### Introduction to Statistical Techniques PART 1

- Explain descriptive and inferential analysis
- Calculate mean, mode, median, moving average for a data set
- Calculate measures of dispersion – variance, standard deviation, coefficient of variation

### Introduction to Statistical Techniques PART 2

- Apply the basic principles of time series analysis
- Explain trends and variations as a basis of forecasting







## MODULE 6

### Practical Advanced Excel Case Study 1

- This case study presents a scenario in which you are required to calculate forecast numbers for sales, purchases and closing inventories.
- The forecasts need to be presented in tabular and chart formats in Excel.
- Improve Excel skills and use them in practical ways to address real-world type issues

### Practical Advanced Excel Case Study 2

- This case study presents a scenario in which you are required to prepare a receivables control account in Excel based on underlying transaction data and reconcile it to the receivables subledger.
- Improve Excel skills and use them in practical ways to address real-world type issues

### Practical Advanced Excel Case Study 3

- This case study presents a scenario in which you are required to calculate two-year projections for sales, purchases, and expenses.
- Improve Excel skills and use them in practical ways to address real-world type issues

## DELIVERY AND PROGRESSION PATHWAYS

### 1.1 Delivery

- 6 Module Programme, 12 one hour classes, delivered via recorded Webinar.
- Each module will have pre-course reading requirements. All materials will be provided. Learning materials include reading material where necessary along with slides and worksheets where required.

NOTE: Participants will be unable to follow the 3 Case study modules without an advanced understanding of Excel. To this end, 6 Advanced Excel Hours have been built into the CPDlive programme. These will be available for all participants to complete free of charge as a pre-requisite of the case study element of this programme. All are available via MyCPD.

| Session Name   | Provider |
|--|----------|
| The Advanced Excel Hour 1 - Format your Data                           | IACT     |
| The Advanced Excel Hour 2 - Daily Functions in Excel                   | IACT     |
| The Advanced Excel Hour 3 - Data Tables                                | IACT     |
| The Advanced Excel Hour 4 - Conditional Formulas and Logical Functions | IACT     |
| The Advanced Excel Hour 5 - Lookup Functions                           | IACT     |
| The Advanced Excel Hour 6 - Pivot Tables                               | IACT     |





## 1.2 Progression Pathways

Upon successful completion of this programme, participants may:

- Identify specific CPD courses to further enhance knowledge, skills, and competencies
- Progress to the Work Practice Programme for the purpose of becoming a full Member of ATI
- Progress to ATI's Accounting Technologist Degree Programme (assuming any other pre-requisites have been achieved)

### PROGRESSION PATHWAYS AND TRAINING PLANS

#### Affiliate Member commenced study prior to 2020

- 1) Complete 6, 1 hour Advanced Excel CPDlive sessions (where required)
- 2) Complete Professional Certificate in Data Management
- 3) Complete Record of Work Experience and Member Application OR complete the Work Practice Programme
- 4) Become a Member
- 5) Complete 15 hours of CPD Annually
- 6) Register for Level 8 Technologist Degree Programme

#### Affiliate Member Registered 2021, 2022

- 1) Complete Record of Work Experience and Member Application OR complete the Work Practice Programme
- 2) Become a Member
- 3) Complete 15 hours of CPD Annually
- 4) Register for Level 8 Technologist Degree Programme

#### Member & Fellow commenced study prior to 2020

- 1) Complete 15 hours of CPD Annually
- 2) Complete 6, 1 hour Advanced Excel CPDlive sessions (Where required)
- 3) Complete Professional Certificate in Data Management for Finance Programme
- 4) Register for Level 8 Technologist Degree Programme

#### Member and Fellow commenced study after 2020

- 1) Complete 15 hours of CPD Annually
- 2) Register for Level 8 Technologist Degree Programme

## TRAINER BIOS



### ALBERT GILL

Albert Gill holds a Masters Degree and a Bachelors in Management from the Institute of Public Administration. He has been teaching Business Management on the ATI Course for the last twelve years. He has been an eTutor for Business Management since 2017. He has extensive teaching experience in business management, business law, and accounting subjects. He is also a qualified life coach.



### BARRY SMITH

Barry Smith has been teaching accounting and finance at professional, postgraduate and undergraduate levels since 2001. He qualified as a Chartered Accountant in 1996 and also holds postgraduate degrees from University College Dublin (MEconSc) and the University of Birmingham (PhD).

Barry is a member of the ATI team that is currently developing the forthcoming Accounting Technologist programme.



### CIARA CRILLY – PROGRAMME CO-ORDINATOR

Ciara Crilly has been with Accounting Technicians Ireland for 10 years and is the Professional Development Lead for Member Experience, managing the Professional Development Programme including the popular CPDlive and CPDgo programmes along with the development of the new Professional Certificate in Data Management for Finance.

With almost 20 years experience in multiple learning and development environments Ciara is passionate about driving change through continuous personal and professional development and inspiring a culture of life long learning.

## HOW TO BOOK

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This programme is available to members at a subsidised total cost of €300/£265.





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