



Accounting
Technicians
Ireland

Professional Certificate in Data Management for Finance



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Contents

Introduction to the Professional Certificate	
in Data Management for Finance	4
Criteria for Programme Completion	5
Awards for Successful Completion	5
Overview of Programme Modules	6
Programme Learning Outcomes	6
Programme Delivery and Schedule	10
Recommended Progression and Development Pathways	11
Programme Leader Biography	12



Introduction to the Professional Certificate in Data Management for Finance

This Programme will be of interest to Fellows, Members, and Affiliate Members who completed their initial ATI studies prior to 2020 and are interested to know more about any of the following:

- Recent developments in financial and non-financial regulatory environments.
- The sustainability agenda as it affects the work of Accounting Technicians.
- The evolving technological environment as it increasingly affects Accounting Technicians.
- Practical problem-solving capabilities in an Excel environment.
- Personal skills that are increasingly valued in the workplace.

This programme consists of six modules, which will be delivered over eight sessions. Each session comprises 90 minutes of class time and approximately 60 minutes of pre-class reading and preparation. Each session will be offered on a live and recorded basis and is available for subscription on Source. The live programme will be delivered during April and May 2024 and the recorded 'on demand' programme will be available shortly thereafter.

Module 6 of the programme will involve hands-on use of Microsoft Excel and prior advanced knowledge of Excel is assumed. This module is therefore supplemented by six one-hour Advanced Excel CPD courses offered as part of ATI's CPDgo OnDemand series of webinars. The Excel courses are a pre-requisite for module 6 of this programme.



Criteria for Programme Completion

To obtain the Certificate of Completion that is awarded for completion of the programme, participants must successfully complete a short assessment for each of the six modules. Each assessment will comprise a number of multiple-choice questions that can be attempted directly or after some preliminary work in Excel. The grade required to pass each module assessment is 100%. Each module assessment may be attempted more than once where necessary to achieve the required 100%.

Awards for Successful Completion

Upon successful completion of this programme:

- Participants receive 16 hours of CPD that correspond to attendance at all eight 90-minute module sessions and completion of assessment and pre/post course work. Additional CPD hours are awarded for the six Excel CPDlive courses.
- Participants receive an ATI Certificate of Completion in relation to Data Management for Finance.
- Affiliate Members can progress to the Accounting Technicians Work Practice Programme for the purpose of becoming full members of ATI.
- Full Members can progress to ATI's forthcoming Accounting Technologist Degree Apprenticeship Programme (assuming any other pre- requisites have been achieved).

Participants can identify specific CPD courses to further enhance knowledge, skills, and competencies.

Overview of Content

Professional Certificate in Data Management for Finance	
MODULE 1	The Evolving Landscape for Accountancy Professionals
MODULE 2	Sustainability and Social Responsibility
MODULE 3	Data Management and Big Data
MODULE 4	Data Analytics and Statistical Techniques Part 1
	Data Analytics and Statistical Techniques Part 2
MODULE 5	Personal Effectiveness in the Evolving Workplace
MODULE 6	Practical Advanced Excel Case Study 1
	Practical Advanced Excel Case Study 2

Programme Learning Outcomes

Module 1

The Evolving Landscape for Accountancy Professionals

- Describe the evolution from manual to computerised accounting systems with a particular focus on automation and integration.
- 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.





Module 2

Sustainability and Social Responsibility

- 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)
- 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

Data Management and Big Data

- Describe three main sources of organisational data – transaction, social, sensor.
- Explain how data can be structured (structured/semi-structured/unstructured).
- Outline the nature and characteristics of big data.
- Outline the use cases for big data.
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- Describe the opportunities and challenges associated with the emergence of big data for organisations and for accountancy professionals.
- Outline the ethical issues associated with big data, data visualisation and data analytics (including data protection issues)

Module 4

Data Analytics and Statistical Techniques

- Describe a typical data analytics framework.
- Illustrate how data visualisation can be effective.
- Outline the ethical issues associated with big data, data visualisation and data analytics (including data protection issues).
- Explain descriptive and inferential analysis.
- Calculate mean, mode, and median for a data set.
- Calculate measures of dispersion – variance, standard deviation, coefficient of variation.
- Apply the basic principles of time series analysis.
- Explain trends and variations as a basis of forecasting.

Module 5

Personal Effectiveness in the Evolving Workplace

- Explain how the roles of accountancy professionals are evolving in response to technological developments.





Module 6

Practical Advanced Excel Case Studies

Case Study 1 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.

Case Study 2 presents a scenario in which you are required to calculate two-year projections for sales, purchases, and expenses.

Apply Excel skills to practical accounting problems.

Programme Delivery and Schedule

Programme Delivery

The programme comprises six modules that will be delivered over eight sessions, each session by means of a 90-minutes live Zoom Webinar. All sessions will be recorded and available subsequently as an 'on demand' programme.

Each module will include pre-class reading and/or preparation requirements. All materials (documents, spreadsheets, slides) will be provided in advance of classes on Moodle (which will be the learning management system used for this programme).

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Session Name	Date	Time
The Evolving Landscape for Accountancy Professionals	18-Apr-24	6.30pm
Sustainability and Social Responsibility	25-Apr-24	6.30pm
Data Management and Big Data	02-May-24	6.30pm
Data Analytics and Statistical Techniques Part 1	09-May-24	6.30pm
Data Analytics and Statistical Techniques Part 2	16-May-24	6.30pm
Personal Effectiveness in the Evolving Workplace	23-May-24	6.30pm
Practical Advanced Excel Case Study 1	30-May-24	6.30pm
Practical Advanced Excel Case Study 2	06-Jun-24	6.30pm

NOTE: Module 6 of the programme will involve hands-on use of Microsoft Excel and prior advanced knowledge of Excel is assumed. This module is therefore supplemented by six one-hour Advanced Excel CPD courses offered as part of ATI's CPDgo OnDemand series of webinars. The Excel courses are a pre-requisite for module 6 of this programme and are provided to each attendee via the MyCPD Platform.

CPDgo OnDemand: The Excel Power Hour 1	CPDgo OnDemand: The Excel Power Hour 4
CPDgo OnDemand: The Excel Power Hour 2	CPDgo OnDemand: The Excel Power Hour 5
CPDgo OnDemand: The Excel Power Hour 3	CPDgo OnDemand: The Excel Power Hour 6

Recommended Progression and Development

Pathways by membership status

Affiliate Members

Registered Pre-2020

- 1) Complete Record of Work Experience and Membership Application OR Complete ATI Work Practice Programme
- 2) Become a Member
- 3) Complete fifteen hours of CPD annually
- 4) Complete Professional Certificate in Data Management for Finance (note: can be completed as an affiliate or full member)
- 5) Apply for degree level Accounting Technologist Programme (assuming any other pre- requisites have

been achieved)

Affiliate Member Registered 2021, 2022

- 1) Complete Record of Work Experience and Membership Application OR Complete ATI Work Practice Programme.
- 2) Become a Member.
- 3) Complete fifteen hours of CPD annually
- 4) Apply for degree level Accounting Technologist Programme (assuming any other pre-requisites have been achieved)

Full Members and Fellows Pre-2020

- 1) Complete fifteen hours of CPD annually
- 2) Complete six, one-hour six one-hour Advanced Excel CPD courses (where required)
- 3) Complete Professional Certificate in Data Management for Finance
- 4) Register for degree level Accounting Technologist Programme (assuming any other pre- requisites have been achieved)

Full Members and Fellows Post-2020

- 1) Complete fifteen hours of CPD annually.
- 2) Register for degree level Accounting Technologist Programme (assuming any other pre- requisites have been achieved)

Programme Leader Biography



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's interest in accountancy education extends to the development of related educational technologies and the authoring of professional articles and textbooks. Examples include his development of the MyRevision application that is part of Accounting Technicians Ireland's educational platform and his very popular introductory textbook on financial accounting published by McGraw-Hill.

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

How to Book

The programme can be purchased through the members Touchpoint portal.

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



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