

# POWER BI FOR FINANCE PROFESSIONALS

## **COURSE OVERVIEW**

This course is designed to empower finance professionals with the skills required to create polished, professional, and impactful presentations using Power BI. Participants will gain mastery in handling complex financial datasets, transforming raw data into meaningful insights, and performing advanced analyses to uncover trends and patterns. They will also learn to design dynamic, interactive dashboards that not only enhance data visualization but are also optimized for strategic decision-making. Additionally, the course highlights the importance of dashboard sharing, participants will learn how to publish, share, and optimize interactive dashboards in Power BI. This ensures collaboration and tailored reporting for organizational needs.

## **TARGET COMPETENCIES**

- Data Management and Transformation
- Data Modeling
- Data Analysis
- Interactive Dashboard Design
- Scenario Analysis
- Data Sharing

## **COURSE OBJECTIVES**

By completely attending this course, participants will be able to:

- Understand Power BI fundamentals for financial reporting.
- Master financial data preparation and transformation.
- Develop analytical skills for key financial metrics and KPIs.
- Build interactive customized dashboards for presentations.
- Analyze financial scenarios to support decision-making.
- Publish Power BI dashboards for effective collaboration.

## **TARGET AUDIENCE**

Finance Managers, Financial Controllers, CFOs and Finance Executives, Financial Advisors, Budget Analysts, Treasury and Investment Professionals, Professionals responsible for financial reporting and decision-making.

## **NOTE**

This course requires participants to bring their own laptops with a Windows operating system, Power BI and Excel 2019/365 fully installed.

# **COURSE METHODOLOGY**

The course incorporates instructor-led training sessions, practical hands-on activities focused on dashboard creation and data analysis, collaborative exchanges of best practices in financial reporting, and designing and presenting impactful financial dashboards.

## **COURSE OUTLINE**

### **FUNDAMENTALS OF POWER BI FOR FINANCE PROFESSIONALS**

- Introduction to Power BI.
  - Overview of Power BI and its Benefits for Financial Reporting.
  - Exploring the Interface and Navigation.
- Data Connection and Integration.
  - Connecting to Financial Data Sources.
  - Establishing Live Connections.
  - Relational Data Models and Connections.
- Data Cleaning and Preparation.
  - Handling Missing Values.
  - Standardizing Data Formats.
  - Removing Duplicates and Unnecessary Columns.
- Data Transformation Techniques.
  - Merging Datasets and Appending Multiple Sources.
  - Filtering Data for Insights.

### **DATA MODELING AND ANALYSIS**

- Data Modeling Basics.
  - Understanding Relationships.
  - Linking Financial Data Tables.
  - Configuring Cross-Filtering Settings.
  - Calculated Columns.
- DAX (Data Analysis Expressions).
  - Overview, syntax, and functions for financial metrics.
  - Calculated Columns vs. Measures.
- Time Intelligence Techniques.
  - Year-Over-Year (YOY) Analysis.
  - Year-To-Date (YTD) Analysis.
  - Rolling Totals and Dynamic Time-Series Visualizations.

### **DESIGNING FINANCIAL DASHBOARDS AND REPORTS**

- Dashboard Design Principles.
  - Aligning Objectives, Selecting Visuals, and Optimizing Layout.
  - Ensuring Cross-Device Compatibility.
- Interactive Features.
  - Dynamic exploration and audience-specific designs.
  - Multi-page dashboard development.
- Visual Storytelling with Data.
  - Themes, clarity, and narrative-driven reporting.

### **SCENARIO ANALYSIS AND CREATING REPORTS**

- Scenario Analysis.
  - Dynamic What-If Analysis Using DAX and Slicers.
  - Visualizing Financial Scenarios.
- Creating Reports.
  - Exporting dashboards and embedding live visuals .
  - Presenting scenario-based dashboards.

### **PUBLISHING AND SHARING DASHBOARD**

- Publishing and Exploring Reports in Power BI Service.
  - Steps to Publish Reports.
  - Exploring Reports Online.
- Creating and Optimizing Dashboards.
  - Interactive and mobile-friendly dashboards.
  - Dataset refresh and collaboration best practices.

To register or for complete course information

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