MERCURY

Power BI for Finance and Accounting

9 – 13 August 2027
Paris (France)



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Ref: 15798_328487 **Date:** 9 – 13 August 2027 **Location:** Paris (France) **Fees:** 5900 Euro

Introduction:

Analyzing and visualizing data is paramount for success in today's rapidly evolving financial landscape. Power BI, a powerful business analytics tool developed by Microsoft, empowers finance and accounting professionals to transform raw data into meaningful insights. This Power BI for Finance and Accounting course equips participants with the skills to harness Power BI's full potential to enhance decision-making, improve financial reporting, and drive strategic initiatives.

In this Power BI for Finance and Accounting course, participants will explore the features of Power BI, including data modeling, visualization techniques, and creating interactive dashboards for finance and accounting purposes. They will learn how to connect to various data sources, perform advanced analytics, generate real-time reports that view financial performance, and unlock the potential of Power BI for accounting to automate and enhance their accounting processes.

Learners in this Power BI for Finance and Accounting training will be adept at leveraging Power BI to optimize financial processes, facilitate informed decision-making, and enhance the overall efficiency of their finance and accounting functions. Whether they are financial analysts, accountants, or finance managers, this course will elevate their data analysis capabilities and prepare them to meet the challenges of modern financial management.

The Power BI for Finance and Accounting course enhances participants' skills in leveraging Power BI in finance and accounting. Learn how to create Power BI finance dashboards that streamline financial reporting and analysis. It covers techniques for developing a Power BI dashboard for finance, helping them visualize complex financial data and generate Power BI finance reports. Whether in finance or accounting, mastering Power BI for finance and Power BI accounting will empower them to make data-driven decisions and optimize financial performance.

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Targeted Groups:

- Finance Managers.
- Financial Analysts.
- Accountants.
- Budget Analysts.
- Business Intelligence Professionals.
- Data Analysts.
- Controllers.
- Internal Auditors.
- Financial Reporting Teams.
- Executives and Decision Makers.
- Students in Finance and Accounting Fields.
- Anyone seeking to enhance their data visualization skills in finance.

Course Objectives:

At the end of this Power BI for Finance and Accounting course, the participants will be able to:

- Understand the fundamentals of Power BI and its relevance to finance and accounting.
- Learn to connect Power BI to various financial data sources, including spreadsheets and databases.
- Develop skills in data modeling to enhance the accuracy and efficiency of financial analysis.
- Create interactive and visually appealing dashboards tailored for financial reporting.
- Utilize advanced analytics tools within Power BI to identify trends and insights.
- Master the creation of dynamic reports that facilitate real-time decision-making.
- Explore best practices for visualizing financial data to communicate findings effectively.
- Implement Key Performance Indicators KPIs to monitor financial performance.
- Gain proficiency in using DAX Data Analysis Expressions for complex calculations.
- Analyze historical financial data to support budgeting and forecasting processes.
- Enhance collaboration by sharing Power BI reports across teams and stakeholders.
- Understand the role of Power BI in ensuring compliance with financial regulations.
- Develop data-driven storytelling techniques to present financial information compellingly.
- Learn troubleshooting methods for common Power BI issues in a financial context.
- Foster critical thinking and problem-solving skills through practical Power BI exercises.
- Equip participants with the tools necessary to drive strategic initiatives using data insights.
- Prepare for future advancements in business intelligence tools relevant to finance.
- Establish a foundation for continuous learning and improvement in data analytics.

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Targeted Competencies:

By the end of this Power BI for Finance and Accounting training, the participant's competencies will:

- Data Visualization Skills.
- Financial Data Analysis.
- Data Modeling Techniques.
- Report Creation and Management.
- Advanced Analytics Proficiency.
- Dashboard Development.
- Data Integration from Multiple Sources.
- KPI and Metric Development.
- Strategic Decision-Making Abilities.
- Business Intelligence Implementation.
- Data-Driven Storytelling.
- Financial Reporting and Compliance Knowledge.

Course Content:

Unit 1: Introduction to Power BI:

- Understand the basic concepts and components of Power BI.
- Explore the Power BI Desktop interface and its functionalities.
- Learn the importance of data visualization in finance and accounting.
- Familiarize yourself with different data sources compatible with Power BI.
- Review the installation process and system requirements for Power BI.
- Identify the various types of Power BI licenses and their benefits.
- Discuss the role of Power BI in modern financial reporting and analysis.
- Analyze case studies showcasing Power BI applications in finance.
- Understand the difference between Power BI Desktop, Power BI Service, and Power BI Mobile.
- Explore the Power BI community and available resources for ongoing learning.

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Unit 2: Data Preparation and Modeling:

- Learn to connect to multiple data sources, such as Excel, SQL Server, and cloud services.
- Understand the data transformation process using Power Query.
- Clean and prepare financial data for analysis, including handling missing values.
- Explore data modeling techniques to create relationships between tables.
- Develop calculated columns and measures using DAX for financial metrics.
- Practice creating data hierarchies to enhance navigation and reporting.
- Use grouping and binning techniques for better data categorization.
- Explore the use of parameters for dynamic reporting.
- Understand the significance of data types and their impact on analysis.
- Create and manage a data model diagram for visualization of relationships.

Unit 3: Creating Visualizations and Reports:

- Discover different types of visualizations available in Power BI.
- Learn best practices for selecting the right visualization for financial data.
- Create interactive dashboards that provide real-time insights.
- Explore the use of slicers and filters to refine data presentations.
- Design and format reports to meet professional standards in finance.
- Understand the principles of effective storytelling through data visualization.
- Utilize tooltips and drill-through features for enhanced user interactivity.
- Practice creating custom visuals to meet specific reporting needs.
- Learn how to use themes and templates to maintain consistency in reports.
- Evaluate the effectiveness of different visualizations in conveying financial insights.

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Unit 4: Advanced Analytics and DAX:

- Dive into advanced DAX functions for complex financial calculations.
- Explore time intelligence functions for effective year-over-year analysis.
- Learn to create calculated measures for profitability, revenue, and expenses.
- Understand how to conduct variance analysis and trend forecasting.
- Use what-if parameters to simulate different financial scenarios.
- Explore data analysis features, including Quick Insights and AI insights.
- Implement ranking and grouping functions for performance evaluation.
- Learn to create dynamic measures that adjust based on user selections.
- Understand the role of context in DAX calculations and its implications for financial analysis.
- Analyze real-world scenarios to practice advanced DAX applications in finance.

Unit 5: Sharing and Collaboration:

- Learn how to publish and share Power BI reports securely.
- Understand the options for exporting reports to various formats.
- Explore Power BI Service for collaboration and report sharing.
- Implement row-level security to protect sensitive financial data.
- Learn how to schedule data refreshes for real-time reporting.
- Understand the integration of Power BI with other Microsoft tools like Excel and Teams.
- Create and manage workspaces for team collaboration on reports.
- Explore using Power BI apps to distribute content to broader audiences.
- Understand how to leverage Power BI's commenting features for collaborative feedback.
- Discuss governance and compliance considerations when sharing financial data.