

# Power BI for Financial Reporting

## Training Methodology

This course follows a practical, hands-on approach to teach participants how to utilize Power BI for financial reporting. The methodology includes:

- Instructor-led demonstrations: Live walkthroughs of how to create financial reports using Power BI's tools.
- Real-world financial datasets: Participants will work with financial data to apply the concepts learned.
- Interactive discussions: Group discussions and Q&A sessions to address common financial reporting challenges.
- Case studies: Practical application of Power BI to solve financial reporting needs.
- Continuous feedback: Regular feedback to help participants refine their reports and dashboards for financial analysis.

## Course Overview

Power BI for Financial Reporting is designed to help financial professionals and analysts use Power BI to streamline and enhance their financial reporting. Participants will learn how to create dynamic financial reports, analyze financial data, and build dashboards that provide actionable insights. By the end of the course, participants will have the skills to automate and optimize financial reporting processes using Power BI.

## What You Will Learn

## Power BI for Financial Reporting

- Financial Data Visualization: Learn how to present financial metrics, KPIs, and trends using Power BI visuals.
- DAX for Financial Analysis: Master key DAX functions to create financial calculations and measures.
- Dynamic Financial Dashboards: Build real-time financial dashboards that allow for interactive data exploration.
- Forecasting and Budgeting: Use Power BI to create forecast and budget models for financial planning.
- Automating Financial Reports: Learn how to automate the creation and distribution of financial reports using Power BI.

### Who Should Learn

- Financial Analysts: Professionals responsible for preparing financial reports and analyzing financial data.
- Accountants: Individuals who need to generate financial statements, budget reports, and performance dashboards.
- Finance Managers: Decision-makers looking to monitor financial performance and streamline reporting processes.
- Business Intelligence Specialists: BI professionals tasked with implementing financial reporting systems.
- Executives and Managers: Decision-makers who rely on financial reports for strategic planning and budgeting.

### 5 Training Modules

# Power BI for Financial Reporting

## Module 1: Introduction to Power BI for Financial Reporting

- Understanding financial data and reports.
- Connecting Power BI to financial data sources (Excel, databases, etc.).
- Overview of Power BI visuals and their use in financial reporting.

## Module 2: Financial Data Modeling and DAX for Finance

- Structuring financial data models in Power BI.
- Key DAX functions for financial analysis (e.g., SUMX, CALCULATE, FILTER).
- Creating calculated columns and measures for financial metrics.

## Module 3: Building Financial Reports and Statements

- Designing interactive financial reports (income statements, balance sheets, cash flow).
- Using PivotTables and charts to present financial data.
- Creating automated financial statements using Power BI.

## Module 4: Budgeting, Forecasting, and Variance Analysis

- Building budget and forecast models in Power BI.
- Analyzing variances between actuals and budgets.
- Implementing what-if analysis and scenarios for financial planning.

## Module 5: Automating and Sharing Financial Dashboards

- Automating financial report generation and data refreshes.
- Sharing financial dashboards securely with stakeholders.
- Managing permissions and access control for financial data in Power BI.

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## Conclusion

By the end of this Power BI for Financial Reporting course, participants will have the skills to create dynamic financial reports and dashboards that provide valuable insights into an organization's financial performance. They will be able to use Power BI's powerful tools to streamline financial reporting, making this course ideal for financial analysts, accountants, and business leaders looking to optimize their reporting processes.