POWER BI FOR FINANCE PROFESSIONALS



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Power BI for Finance Professionals Training Course shows finance teams how to turn ledger data, budgets and reports into dashboards they control. Participants learn to connect financial data sources, clean them in Power Query, model them properly and build measures in DAX. The programme covers star schema design, time intelligence, budget versus actual analysis, variance reporting and financial statement dashboards. Furthermore, it addresses data governance, refresh scheduling and report distribution. As a result, delegates can retire manual spreadsheet reporting and deliver analysis that managers act on. Gentex Training Center delivers the programme through hands-on dashboard workshops on financial data.

Power BI for Finance Professionals Course Objectives

- Connect to financial data sources including Excel, SQL and ERP exports.
- Clean and transform data using Power Query and applied steps.
- Build a star schema model with date, account and cost centre dimensions.
- Write DAX measures for revenue, cost, margin and variance.
- Apply time intelligence for year-to-date, prior period and rolling calculations.
- Produce budget versus actual and variance analysis in a report.
- Build financial statement dashboards for profit and loss and cash flow.
- Apply row-level security and data governance controls.
- Schedule refresh and distribute reports through workspaces and apps.
- Apply visualisation best practice to financial reporting.

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Course Methodology

The course combines short demonstrations with extensive hands-on workshops using realistic financial datasets. Participants build queries, model data, write DAX measures and publish dashboards, then present insights to a review panel. In addition, structured peer review and group discussion reinforce each technique, and every day closes with an applied reporting task.

Who Should Take This Course

- Finance analysts, accountants and management reporting staff.
- Financial planning and analysis professionals.
- Budgeting, forecasting and cost control teams.
- Controllers and finance managers preparing management packs.
- Internal auditors and analysts reviewing financial data.
- Finance staff moving from Excel reporting to BI dashboards.

Power BI for Finance Professionals Course Outlines

Day 1: Connecting and Preparing Financial Data

- Power BI Desktop, service and workspace overview.
- Connecting to Excel, CSV, SQL and ERP data extracts.
- Power Query for cleaning, merging and transformation.
- Applied steps, parameterisation and query folding basics.
- Handling trial balances, chart of accounts and cost centres.
- Data quality checks before modelling.
- Workshop: preparing a trial balance and ledger extract for modelling.

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Day 2: Data Modelling for Financial Reporting

- Star schema design for financial data.
- Fact and dimension tables: general ledger, accounts, dates, entities.
- Relationship design, filter direction and inactive relationships.
- Date tables and marking as date table.
- Handling multiple currencies and consolidation levels.
- Model performance and file size considerations.
- Workshop: building a financial data model with a date table.

Day 3: DAX Measures for Finance

- Calculated columns versus measures in financial models.
- Core measures: revenue, cost of sales, gross margin, EBITDA.
- CALCULATE, FILTER and time intelligence functions.
- Year-to-date, prior year and rolling twelve-month calculations.
- Variance and percentage variance measures.
- Ranking, contribution and cost per unit measures.
- Workshop: writing a full DAX measure set for a finance report.

Day 4: Financial Dashboards and Reporting

- Budget versus actual and forecast comparison reporting.
- Profit and loss, balance sheet and cash flow dashboards.
- Variance analysis by account, cost centre and period.
- Drill-down, drill-through and slicers for finance review.
- Conditional formatting and KPI cards for exceptions.

- Visualisation best practice and avoiding misleading charts.
- Workshop: building a management reporting dashboard.

Day 5: Governance, Refresh and Distribution

- Row-level security and role management.
- Data governance, lineage and sensitivity labelling.
- Scheduled refresh, gateways and data source credentials.
- Publishing to workspaces, apps and distribution lists.
- Subscriptions, alerts and mobile consumption.
- Documentation, handover and report maintenance.
- Workshop: publishing and presenting a finance dashboard before a review panel.

Conclusion

By successfully completing Power BI for Finance Professionals Training Course, participants will have acquired the knowledge to build financial dashboards and automate management reporting. They will understand data preparation, modelling, DAX measures, financial statement dashboards and governance controls, and they will know how to distribute reports that managers rely on. As a result, delegates cut manual reporting effort and improve financial insight. Gentex Training Center builds the programme around current analytics practice.

FAQs for the Power BI for Finance Professionals course

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Q1 What is the "Power BI for Finance Professionals" course about?

It teaches finance teams to build their own dashboards and automate reporting in Power BI. You learn connecting and cleaning financial data, data modelling, DAX measures, budget versus actual reporting, dashboard design and governance.

Q2 What are the key benefits of the "Power BI for Finance Professionals" course?

You cut hours of manual spreadsheet work and reduce reporting errors. You also deliver management packs faster, give managers drillable detail rather than static tables, control access to sensitive financial data, and refresh reports automatically each period.

Q3 What skills will I gain from the "Power BI for Finance Professionals" course?

You will gain financial data preparation and modelling, DAX measure development for finance metrics, financial dashboard and variance reporting design, and Power BI governance, refresh and distribution management.

Q4 What tools, methods, or standards are covered in the "Power BI for Finance Professionals" course?

The course covers Microsoft Power BI Desktop and the Power BI service, Power Query transformations, star schema modelling with fact and dimension tables, DAX functions including CALCULATE, FILTER and time intelligence, budget versus actual and variance measures, financial statement dashboards, row-level security, scheduled refresh and gateways, and publishing through workspaces and apps.

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Q5 How is the "Power BI for Finance Professionals" course applied in real-world practice?

Graduates apply it to build monthly management reporting packs, automate budget versus actual analysis, produce profit and loss and cash flow dashboards, monitor cost centres and variances, secure access for different finance teams, and schedule refreshes so reports are current each reporting period.