



Certificate in Power BI for Accounting Professionals

Certificate Description

This Power BI certificate program equips accounting professionals with a strong, practical foundation to confidently handle a wide range of common accounting tasks. Through hands-on, case-based projects, you will build real-world skills in financial reporting and budget management, without the need of additional paid tools or add-ons.

By the end of the program, you will have a solid understanding of how Power BI works and how to use it effectively in your day-to-day work. More importantly, you will leave with a portfolio of tangible projects you have built yourself that you can use to showcase your skills or reference on the job. You will also learn best practices in data visualization and dashboard design. These skills are essential for communicating insights clearly, yet they are often overlooked.

Designed as an intermediate-level, lab-style program, the course begins with core fundamentals and quickly progresses to intermediate and advanced techniques. The focus throughout is on practical, real-world applications.

20 PD
Hours



Topics Covered

Upon completion of this course, you will gain valuable knowledge on:

Core mechanics of key Power BI components

(Power Query, Data Analysis Expressions (DAX), data modelling, and semantic/context filtering)

- How these components work together and why they are designed to be integrated.
- How to use Power BI more thoughtfully and effectively in practice.
- How to identify when Power BI is the right tool for the task and when it may not be.

Strategies for implementing Power BI solutions

- Understanding the analytics engineering mindset and why it is important for Power BI projects.
- Applying a product management mindset to design effective and user-focused solutions.
- Identifying the key skills and capabilities needed to build and sustain Power BI solutions.
- Key considerations for planning, investing in, and executing modern enterprise reporting and visualization initiatives.

Relational Databases

- Introduction to databases and core concepts.
- How to work with databases in Power BI.
- An overview of cloud computing and why modern data platforms are important for Power BI projects.

Power BI for Financial Tasking

Advanced modelling techniques and DAX measures

- Building customized departmental financial statements from general ledger data.
- Enabling user-driven what-if analysis for scenario planning.
- Managing KPIs through custom measures, dynamic formatting, and advanced visualizations.
- Creating tailored budget reports for different stakeholders.
- Performing variance and decomposition analysis to uncover key drivers.

Power BI Best Practices

- Organizing and managing Power BI projects, including creating clear and maintainable measures, handling a large number of measures efficiently, and documenting your work effectively.
- Data visualization and dashboard design, and how to apply them to create clear, impactful, and visually engaging reports.

Who Should Attend?

Analysts and staff accountants, especially those who:

- Are responsible for enhancing budget reporting using Power BI and have access to ledger-level data.
- Want to advance their skills in developing Power BI reporting solutions.
- Aim to improve the effectiveness of their data visualizations and dashboard designs.

Managers, especially those who:

- Are seeking ideas to improve their team's productivity in financial reporting and budget management using Power BI.
- Lead or contribute to modernization initiatives in FP&A (financial planning and analysis).
- Want to stay current with best practices in enterprise dashboard design and data visualization.
- Need to plan strategically and invest effectively in modern, enterprise-scale reporting and dashboarding solutions.

To get the most out of this session, participants should have at least 1–2 years of experience in one of the following:

- **Microsoft Excel:** Participants should be comfortable with core concepts such as PivotTables, lookup functions, and basic formulas like SUM and SUMIFS. Experience building solutions using Power Query (Get Data) and Power Pivot is also recommended.
- **Power BI:** Participants should have experience building basic or non-production Power BI solutions. This includes ingesting and transforming local data sources such as Excel workbooks and CSV files, writing foundational DAX measures, creating semantic or relational data models, and designing basic visualizations.

Schedule

Class 1 | October 6, 2026

1:00 PM – 5:00 PM EDT

Class 2 | October 13, 2026

1:00 PM – 5:00 PM EDT

Class 3 | October 20, 2026

1:00 PM – 5:00 PM EDT

Class 4 | October 20, 2026

1:00 PM – 5:00 PM EDT

Class 5 | October 20, 2026

1:00 PM – 5:00 PM EDT

You must attend at least ALL live sessions to earn your PD hours and Digital Badge.





Software Requirements

Technical Setup

- Power BI installation.
- Local database setup (for training purposes only; installation files and instructions will be provided).

Software Requirements

- **Personal laptop (recommended):** Please avoid using a work-issued device if possible, as installing a local database and/or Power BI Desktop may be restricted on company-managed systems.
- **Operating system**
 - Windows PC required (macOS is not supported for this session).
 - Windows 11 with the latest updates installed.
 - Minimum of 16 GB RAM recommended.

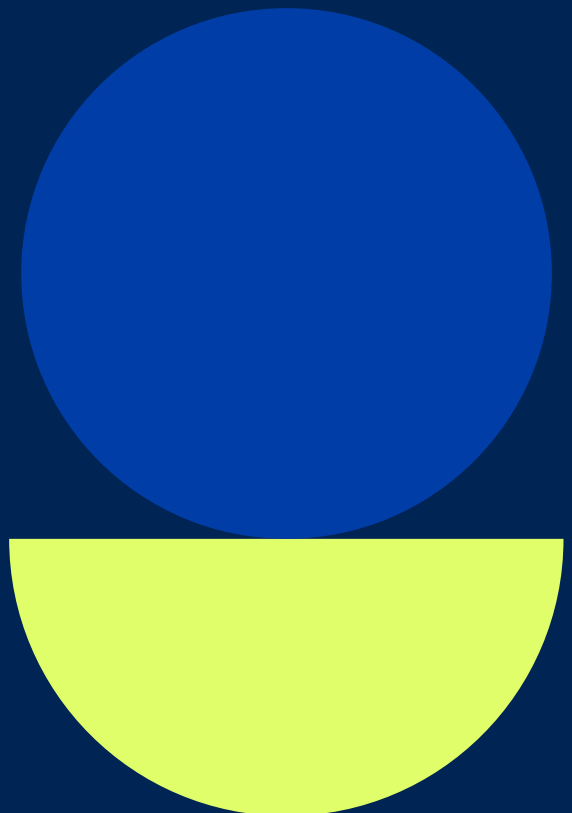
Meet Your Instructor

Andy Hu

Andy Hu has over eight years of experience in accounting, financial analysis, and analytics engineering. Andy is dedicated to helping organizations maximize their data potential.

Andy has held various analyst roles across multiple functional areas, including central accounting/finance, budgeting, academic faculty, central IT, HR ERP system migration, and institutional planning.

Andy has led enterprise datastore initiatives, transformed business processes, and created value-adding visualizations that assist management at different levels while alleviating reporting burdens. As a CPA since 2020, Andy's educational background encompasses advanced accounting and management analytics.



Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this [form](#).

