Universidad de Navarra

Applied tools for Finance B
Guía docente 2025-26

Introduction

- **Brief description:** The goal of this course is an introduction into the data treatment and analysis with tools used in most companies in daily basis. This course will apply tools particularly to any area of a company. Students will see that financial and operating issues are not just theory, that they are very useful during decision-making processes and to manage and run any company /department .
- **Character**: Mandatory
- **ECTS**: 3
- **Course:** 25/26
- **Year and Semester**: 1 year, 2nd semester
- **Language**: English
- **Títle**: Applied Tools for Finance B
- **Module**: Accounting and Finance
- **Program**: Gr.ADE+Data A.b / Gr.ADE+Finan.b
- **Professor in other groups**: Elena Sanjurjo (esanjurjo@unav.es)
- **Schedule**: 08:00 - 10:00
- **Room**: B2 (AMIGOS)

Important Note:

All students must have Windows OS installed in your computers before the first class (Windows 10 is recommended) . If you have MAC OS you should use Bootcamp or a Virtual Machine Software (Parallels Desktop or VMWare...) but it is mandatory to use the last version of Excel for Windows because Excel for MAC lacks some functionalities needed in this course. Besides, Power BI Desktop only runs on WIndows machines.

Competencies

- BC5: Students must develop the learning skills required to undertake subsequent studies with a high level of independence
- CE8: Develop a business valuation plan
- SC6: Use software tools in the quantitative and/or qualitative analysis of economic and/or business issues with sound judgment.
- CG7: To analyze the process of defining and implementing goals and/or strategies in the company.
- CG8: To develop expectations, describe scenarios and make estimates using relevant information for the company.

Program

Chapter 1: Introduction to Business Intelligence (BI)

Chapter 2: Power Query

Chapter 3: Data Model

Chapter 4: Real Life Examples

Educational Activities

I. Classroom teaching activities

1. Lectures/Cases

Lectures are given by the professor on the themes indicated in the syllabus with the help of the blackboard, power point presentations, videos and animation movies. The professor will post on ADI the power point presentation, the notes for each topic and some recommendations for futher reading.

2. One-to-one tutorials

Each student may have personal interviews with the professor to help him/her with personal study and learning.

3. Evaluation

Exams to assess the successful accomplishment of the objectives

II. Personal work

Students must understand themes covered early in the course to be able to comprehend information presented later in the course, and will have to be able to integrate material learnt throughout the course. Therefore, it is important that they do not fall behind and try to set aside regular times outside of class to work on the course material on a daily basis.

1. Students must read the assigned reading for a subject before the lecture covering that topic. Being familiar with topics beforehand will allow students to get the most out of the lecture.

2. Students should conduct personal study using the professor's notes, notes taken in lectures and recommended books if needed.

Assessment

Team Exams: **30%**

Mid Term Exam: **25%**

Ordinary-Final Exam: **45%** (the minimum grade in the final to pass the course is 4 out of 10). All students who do not get at least a 4 in the final exam will fail de course.

Extraordinary-Final Exam: Any student with 6 or more over 10 will pass de course.

The final grade will be "NO PRESENTADO" "NO SHOW UP" if the final exam is missed.

Any attempt to cheat will be severely penalized.

Criteria to pass the course

Students whose final grade is 5 points or more will pass the course.

Students whose final grade is below 5 points will not pass the course and will be graded as *Suspenso* .

Students who do not take the final exam will not pass the course and will be graded as *No presentado.*

Exams review

Students will be able to review the exams in an interview with the professor, after publication of the grades, in a day and place that will be indicated.

Special assessment

For those who do not pass the course or did not take the final exam (grades *Suspenso* or *No presentado)* there will be an extraordinary exam.

Office hours

Professor: Miguel Angel Casares (macasares@unav.es)

Office: 4070

Fridays: 14:00 - 15:00 (previous appointment by mail)

It will be appreciated if the students send and email to macasares@unav.es in order to arrange a meeting and we'll try to accommodate your time preferences.

Bibliography and Resources

1. Beginning Power BI: A Practical Guide to Self-Service Data Analytics with Excel 2016 and Power BI Desktop / by Dan Clark Localízalo en la Biblioteca (ebook).

2. Analyzing and Visualizing Data with Power BI