Power BI for Finance

CertiFi Short Learning Series

1 course · 4 lessons · about 2 study hours · issued 28 Nov 2026

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Power BI for Finance

About 2 study hours · 4 lessons · pass mark 70% · AED 140

Turn ERP exports into a refreshable finance report that people trust. Following one UAE distributor through its monthly close, you will shape GL and budget data with Power Query, build a star-schema model, write the DAX measures finance needs for budget and prior-year variances, and design secure dashboards, including how to use Copilot in Power BI responsibly.

On completion, you will be able to:

- Load and shape GL, trial balance and budget data with repeatable Power Query steps that refresh
- Build a star-schema model with a marked date table, chart-of-accounts mapping and correct relationships
- Write DAX measures for P&L lines, margins, year-to-date, prior-year and budget variances
- Design finance dashboards with variance waterfalls and drill-down, secured with row-level security and shared with sound governance

Learning outcomes by lesson

1. Getting finance data in with Power Query

- Explain what Power BI Desktop, Power Query and the Power BI service each do
- Choose between GL detail, trial balance, ERP and budget sources
- Combine a folder of monthly GL exports and clean them with repeatable steps
- Unpivot a budget workbook, set data types correctly and plan for refresh

2. Building the finance data model

- Explain why a star schema works better than one large flat table
- Separate fact tables from dimension tables in finance data
- Build and mark a date table, and switch off auto date/time
- Map the chart of accounts to P&L lines and set up relationships correctly

3. DAX essentials for finance

- Tell measures from calculated columns and choose the right one
- Write core finance measures with SUM, CALCULATE, FILTER and DIVIDE
- Add year-to-date and prior-year figures with time intelligence functions
- Calculate variances to budget and prior year with signs that always make sense

4. Finance dashboards, security and sharing

- Plan a finance report around the questions its readers ask
- Build P&L, KPI and variance waterfall visuals with slicers and drill-down
- Secure data with row-level security and share through workspaces and apps

- Use Copilot in Power BI responsibly