Building Dashboards with ERP Data (Power BI) Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In the modern enterprise landscape, Enterprise Resource Planning (ERP) systems like SAP, Oracle, and Microsoft Dynamics are the single source of truth for mission-critical operations, generating vast amounts of transactional data. However, this raw data often remains locked within complex, static reporting structures, hindering rapid, data-driven decision-making. This training course addresses that critical gap by equipping participants with the in-demand skills to leverage Microsoft Power BI, the industry-leading business intelligence (BI) tool, for powerful ERP data visualization. By mastering the connection, transformation, and modeling of massive ERP datasets, participants will move beyond basic reporting to create dynamic, real-time dashboards that reveal actionable operational insights, drive digital transformation, and ultimately enhance business performance across all departments.

Building Dashboards with ERP Data (Power BI) Training Course is designed as a deep dive into the practical workflow of ERP-to-BI integration. It provides a structured, hands-on approach to tackling the unique challenges of ERP data, including data governance, data security (RLS), and handling complex relational models. Participants will not just learn Power BI features, but apply them directly to core ERP functions such as financials, supply chain, and sales analytics. The focus is on data storytelling and building visually compelling, interactive KPI dashboards that serve executive, managerial, and operational needs. Upon completion, attendees will be certified to deliver transformative business value by turning intricate ERP data into a clear, strategic asset for their organization, accelerating the journey toward becoming a truly data-driven culture

Programme Curriculum

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Course Duration

5 days

Course Objectives

1. Master Power Query to efficiently connect to and extract data from major ERP systems via various data connectors.
2. Apply Star Schema and Snowflake Schema best practices for optimal data modeling of complex ERP tables.
3. Utilize the Power Query Editor for effective data cleansing, shaping, and ETL processes on large-scale transactional data.
4. Write advanced DAX (Data Analysis Expressions) measures, calculated columns, and tables for complex time-intelligence and custom KPIs.
5. Design and build professional, user-centric, and interactive KPI dashboards for executive reporting and drill-down analysis.
6. Create detailed dashboards for P&L analysis, Budget vs. Actuals, and cash flow forecasting.
7. Develop dashboards to track Inventory Management, on-time delivery (OTD), and procurement spend analysis.
8. Implement sales funnels, customer lifetime value (CLV), and regional sales trend reports.
9. Implement Row-Level Security (RLS) to ensure data governance and secure, segmented data access across the organization.
10. Optimize Power BI data models and reports for performance tuning and faster refresh rates on large ERP datasets.
11. Master the Power BI Service for publishing, sharing, and administering reports and app workspaces.
12. Configure Data Gateways for secure and automated data refresh schedules between the on-premise ERP and the Power BI Service.
13. Present complex ERP insights clearly using effective data visualization best practices and narrative structure.

Target Audience

1. Business Analysts.
2. Finance Professionals/Controllers.
3. ERP/System Administrators.
4. Supply Chain/Operations Managers.
5. IT Data Professionals.
6. Department Heads.
7. Data Enthusiasts & Power Users.
8. Project Managers.

Course Modules

1. Connecting & Preparing ERP Data

- Identifying key ERP data entities
- Connecting to ERP data via OData, SQL, or custom connectors.
- Applying Power Query to extract and transform complex ERP tables.
- Handling challenging data types and ensuring data quality.
- Case Study: Cleaning and merging disparate tables from a multi-module ERP system to create a unified data set.

2. Relational Data Modeling for BI

- Understanding the differences between transactional and analytical modeling.
- Implementing Dimensional Modeling for query performance.
- Defining and managing relationships between Fact and Dimension tables.
- Creating a Date Dimension Table for robust time intelligence.
- Case Study: Modeling an SAP S/4HANA Sales Order data set into a Star Schema for quick slicing by Customer, Product, and Date.

3. DAX Fundamentals for Business Logic

- Introduction to Calculated Columns and Measures and context transition.
- Writing fundamental DAX measures for core KPIs.
- Implementing Time Intelligence Functions.
- Creating dynamic segmentation using logic and conditional measures.
- Case Study: Calculating Month-to-Date (MTD) Revenue and comparing it to the same period last year for a Dynamics 365 Finance report.

4. Financial & P&L Dashboard Creation

- Designing an effective chart of accounts structure for Power BI.
- Building a flexible Budget and Actuals report using parameters and slicers.
- Creating a dynamic P&L Statement with drill-down functionality.
- Using Financial visuals and custom formatting for professional reports.
- Case Study: Developing an Executive Financial Summary Dashboard with EBITDA, Operating Margin, and drill-through to Cost Center detail.

5. Supply Chain & Operations Dashboards

- Visualizing inventory turnover ratio and stock levels.

- Tracking Purchase Order (PO) variance and vendor performance.
- Creating a multi-level Bill of Materials (BOM) visualization.
- Monitoring production efficiency and machine utilization rates.
- Case Study: Building an Inventory Optimization Dashboard using SAP ERP data to flag low-stock items based on historical demand and lead time.

6. Sales and CRM Analytics with Power BI

- Developing a Sales Pipeline and forecast accuracy dashboard.
- Analyzing Customer Churn and retention rates with time-series data.
- Creating a geographical sales analysis using Map visuals.
- Calculating weighted opportunities and sales team performance.
- Case Study: Designing a Sales Manager Dashboard using Salesforce CRM data to track team performance against quotas.

7. Security, Governance, and Deployment

- Implementing Row-Level Security (RLS) via static and dynamic filters.
- Publishing reports to the Power BI Service and managing workspaces.
- Setting up On-Premises Data Gateway for scheduled data refreshes.
- Managing user access, sharing content, and deploying organizational apps.
- Case Study: Configuring dynamic RLS so that regional sales managers only see data for their assigned territories from the Oracle EBS ERP.

8. Performance Tuning and Best Practices

- Using the Performance Analyzer to identify slow-running visuals/measures.
- Optimizing the Power Query M code and query folding.
- Implementing aggregation tables to reduce query load on large datasets.
- Advanced visualization techniques for data storytelling.
- Case Study: Reducing the report loading time of a 100-million row ERP data model from 45 seconds to under 5 seconds through aggregation and model optimization.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now