

Data analytics for revenue assurance with Power BI

Course outline · issued 14 September 2026

Technology areas	Data Analytics, Power BI and Business Intelligence
Level	Intermediate
Short course	5 days
One-month track	4 weeks · 16 training days · 96 contact hours
Two-month track	8 weeks · 32 training days · 192 contact hours
Delivery	In person, Virtual, Hybrid
Class size	10 to 25 participants
Certification	Certificate of completion
Entry requirements	Confident with spreadsheets. No prior Power BI experience assumed.

Who it is for

Revenue, audit and planning officers who report on collections and compliance.

REVENUE USE CASE

Participants build a filing-compliance and arrears dashboard from an anonymised sample dataset.

By the end, participants can

- Connect, clean and model taxpayer and collection data in Power BI
- Build dashboards that track filing compliance, arrears and collection trends
- Publish and govern reports for management and field offices

Short course modules (5 days)

1. Data sources and Power Query
2. Data modelling and DAX basics
3. Visual design for oversight
4. Row-level security and publishing
5. Capstone dashboard on a sample revenue dataset

One-month track — weeks 1 to 4

4 weeks · 16 training days · 96 contact hours

Week 1 — Data foundations for revenue reporting

- Where collection, assessment and taxpayer data actually sits
- Connecting and profiling sources with Power Query
- Cleaning, typing and shaping messy extracts
- Documenting an extract so it can be rebuilt

Practical: Profile and clean an anonymised collections extract end to end.

Week 2 — Modelling taxpayer data

- Star schemas and why flat tables fail
- Relationships, cardinality and filter direction
- DAX measures for collections, arrears and compliance rates
- Time intelligence across filing periods

Practical: Build a working model over taxpayer, assessment and payment tables.

Week 3 — Visual design for oversight

- Choosing the chart that answers the question
- Compliance, arrears and trend pages
- Drill-through from national to office level
- Accessible colour, labelling and tabular figures

Practical: Produce a three-page dashboard for a management audience.

Week 4 — Publishing and governance

- Workspaces, apps and audience management
- Row-level security by region and office
- Refresh schedules and gateway basics
- Certifying and documenting a report

Practical: Publish the dashboard with row-level security applied by region.

Checkpoint: the one-month track is assessed [here](#).

Two-month track — continues through weeks 5 to 8

8 weeks · 32 training days · 192 contact hours

Week 5 — Advanced modelling and performance

- Calculation groups and reusable measure patterns
- Handling amendments, late filings and restatements
- Incremental refresh and large datasets
- Diagnosing and tuning slow reports

Practical: Rebuild the model to handle amended returns without double counting.

Week 6 — Reconciliation and data quality

- Matching declared returns against remittance records
- Exception and variance reporting
- Data lineage and impact analysis
- Handling refresh failures and source drift

Practical: Build an exception report that surfaces unmatched payments for follow-up.

Week 7 — Running the reporting service

- Release process and change control for reports
- Handling report requests from directorates
- Training and supporting report consumers
- The documentation pack a successor needs

Practical: Write the operating handbook for the dashboard you have built.

Week 8 — Capstone and panel review

- Consolidating the dashboard pack
- Writing the accompanying analytical narrative
- Defending method and data quality
- Roadmap for the next reporting cycle

Practical: Present the capstone dashboard pack to a panel and respond to challenge.

Capstone assessment and post-course evaluation.

Capstone

A published revenue-assurance dashboard pack — filing compliance, arrears ageing and collection trend — built on an anonymised dataset and presented to a review panel.

About this outline

Indicative extended tracks. The one-month track runs weeks 1 to 4; the two-month track continues through week 8 with deeper labs, certification preparation and a capstone. Weeks, contact hours and cohort sizes are finalised with each client.

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