Project 04 — Financial Overview Dashboard

Quickstart Guide

This guide provides quick instructions for opening and navigating the Financial Overview Dashboard. The dashboard highlights revenue, expenses, profitability, and budget performance across departments and time.

Getting Started

- Open the Financial-Overview.pbix file in Power BI Desktop.
- Verify all CSV files load correctly into the model.
- Confirm relationships between Date, Month, Budget, Departments, Categories, and Financial Transactions.
- Refresh the dataset if needed.

Using the Dashboard

- Use the Month Date slicer to filter results by time period.
- Use the Department slicer to focus on a specific department.
- Use the Expense Category slicer to analyze cost drivers.
- KPI cards summarize revenue, expenses, net profit, and margin.
- Trend visuals show financial performance over time.
- Budget visuals compare actual expenses to planned budgets.

Dashboard Pages

- Page 1 — Financial Overview: Executive summary of revenue, expenses, and profit trends.
- Page 2 — Expense Analysis: Expense breakdown by department and category.
- Page 3 — Budget vs Actual: Budget variance analysis and performance indicators.

Notes

This project uses synthetic financial data to simulate realistic budgeting and financial reporting scenarios. It is intended for portfolio demonstration purposes only.