

Power BI Projects (3) Banking domain (end to end)


Projects Flow steps are:

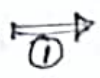
1. Business require documents (BRD)
2. Functional requirement document (FRD)
3. Data gathering
4. Data cleaning / transformation
5. Data modeling
6. UI (power view reports)
7. DAX Functions
8. Enhance UI
9. RLS
10. Create workspace & provide the workspace access.
11. Publish the report to the workspace
12. Dashboard/Mobile view - as an apps.
13. Gateway
14. Schedule refresh
15. Add roles to security
16. Subscribe, manage alerts
17. Share the reports.

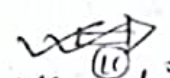
* when ever you have date column, you have to create a master table as a date table.

① a. Created "Datemaster" table

* ^{to} Data modeling : Dealing with the cardinality within the tables. Relationship between the tables.

②  Fact table/business table : which contain all business data
Dimension table : lookup table.

③  Snowflex schema : where all dimension table connected with fact table. and fact table may connected with each other.

 ^{used in this project} Star schema : where all the dimension table connected with fact table only.

 Bridge schema :

b. Data modeling done!

* Calculation table creation : where some of measures are created for get some info.

c. We created some measures. and added on ~~dashboard~~ reports.

in report creation

1. credit card holder
2. Non "
3. Active customer
4. Inactive "
5. Exit customer
6. Retain "
7. total "

d. Then added some slices to dashboard.

1. Year
2. Month
3. Geograph
4. Active category
5. Exit "
6. Gender "

e. Clustered column chart

Total customer by $\frac{\text{Year}}{\text{month}}$ and active category.

f. Created column credit type by given info in business requirements documents.

g. I am facing a problem, month names start with sep. but I want it start with January.

h. ~~After that, I created cluster slicer in the left side~~

h. stacked column chart

i. line chart

j. heating bar chart.

k. on rolling pie chart / Donut chart

l. ~~Q & A chart~~ I created smart narrative from insert. its taking about pie chart.

m. chart % measure created and table was created.

n. book marks created for more vis in one page.

0. create workspace for collaborative work not

Roles: Admin

member — } developers
contributors — }
viewer — clients

P. Publish workspace/projects

Q. Security: Row-level-security

Here, I added security as Row level, in terms of Geography. France, Germany, Spain.

Because, if I wanna only my employ set up only for Spain, they can see, but they can't watch France and Germany. People whose are France set up they can't see Spain and Germany data.

- i. Static RLS — (we used in this project)
- ii. Dynamic RLS

~~***~~ schedule refresh

R. ① Gateway connection: when you data is in on prem means data is in your local machine.

② but if you are using cloud service, sql database, any cloud service, you don't need to use download any gateway

S. We can change the edit table on data cleaning and data source in MS power bi, but to transform data → Advance editor to edit source

To schedule refresh:

For Premium user → 48 times a day (maxim)

For Pro → 8 times per day (maxim)

But when we wanna need refresh in every minute or 5 min we need to use direct query mode, and visualisation mode Page refreshment section should be used.

Page refreshment show only, when we use direct Query mode. it is only best for real time data.

Uo Create a dashboard and ping something into dashboard.
→ Slices don't work in dashboard.

in dashboard creation

Report: it's nothing but, it's a combination of and visuals. We will connect to different dashboard sources we will put the data will create a report. when we publish report to the power bi service. in power bi service using ping option we create dashboard.

→ Report is dynamic

→ dashboard is not dynamic

*** In dashboard → We need to set subscriber for dashboard see. all added user can see dashboard

*** Manage alerts in dashboard

Alert is used to get notification when something change. that is important.

V. Created ~~apps~~ with dashboard for mobile user view
" " " " " pc user view

create apps for pc users to specific users/organisation.

W. By ping whole report to dashboard, we can add slicer. And its work as a dynamic. But I can't add slicer in single system. but I can add with whole report with ping option.

X. From report, we can download the report in power point, Analyze in excel. But in powerpoint we have two option (i) embaded an image, (ii) embaded lived data.

in embaded live data -> we can see real report in ppt.

X. Data hierarchy/Product hierarchy can be created by in report with date/Products.

• tooltip in different charts.

*** End ***