

Use Case: Pool Code Mapping Status

Objective:

Create a comprehensive dashboard in Power BI to provide a summary of pool codes mapping status. The dashboard will enable efficient tracking and analysis of mapped and unmapped pool codes, as well as those associated with ERM mapping. This tool will facilitate informed decision-making, strategic planning, and compliance with regulatory requirements.

Data Understanding:

The data model for this dashboard will likely include the following fields:

- **Date:** Transaction date or record (e.g., Daily, Monthly).
- **Fund Type:** Category of funds (e.g., Deposits, Loans, Reserves).
- **Amount:** Monetary value associated with the fund type.
- **Additional Fields (Optional):**
 - Branch (if applicable)
 - Product (if applicable)
 - Customer Segment (if applicable)

Dashboard Components:

1. Overview Section:

- ❖ Provides a high-level summary of pool code mapping status.
- ❖ Includes key metrics such as total pool codes, mapped codes, unmapped codes, and codes associated with ERM mapping.

2. Mapping Status Table:

- ❖ Displays detailed information about each pool code.
- ❖ Columns include:
 - Pool Code: Unique identifier for each pool code.
 - Mapping Status: Indicates whether the code is mapped, unmapped, or associated with ERM mapping.
 - Product Head: Name of the product head responsible for the code.
 - Product Name: Name of the product associated with the code.
 - Last Updated: Date of the last update for the code.

Dashboard Interactivity:

- Users can interact with slicers to filter data based on specific criteria.
- Clicking on a data point in the mapping status trends chart will filter the mapping status table to display relevant information.
- Performance analysis table updates dynamically based on slicer selections, providing tailored insights for the selected category.