DataVerse

Data visualization for Finance

Group 6

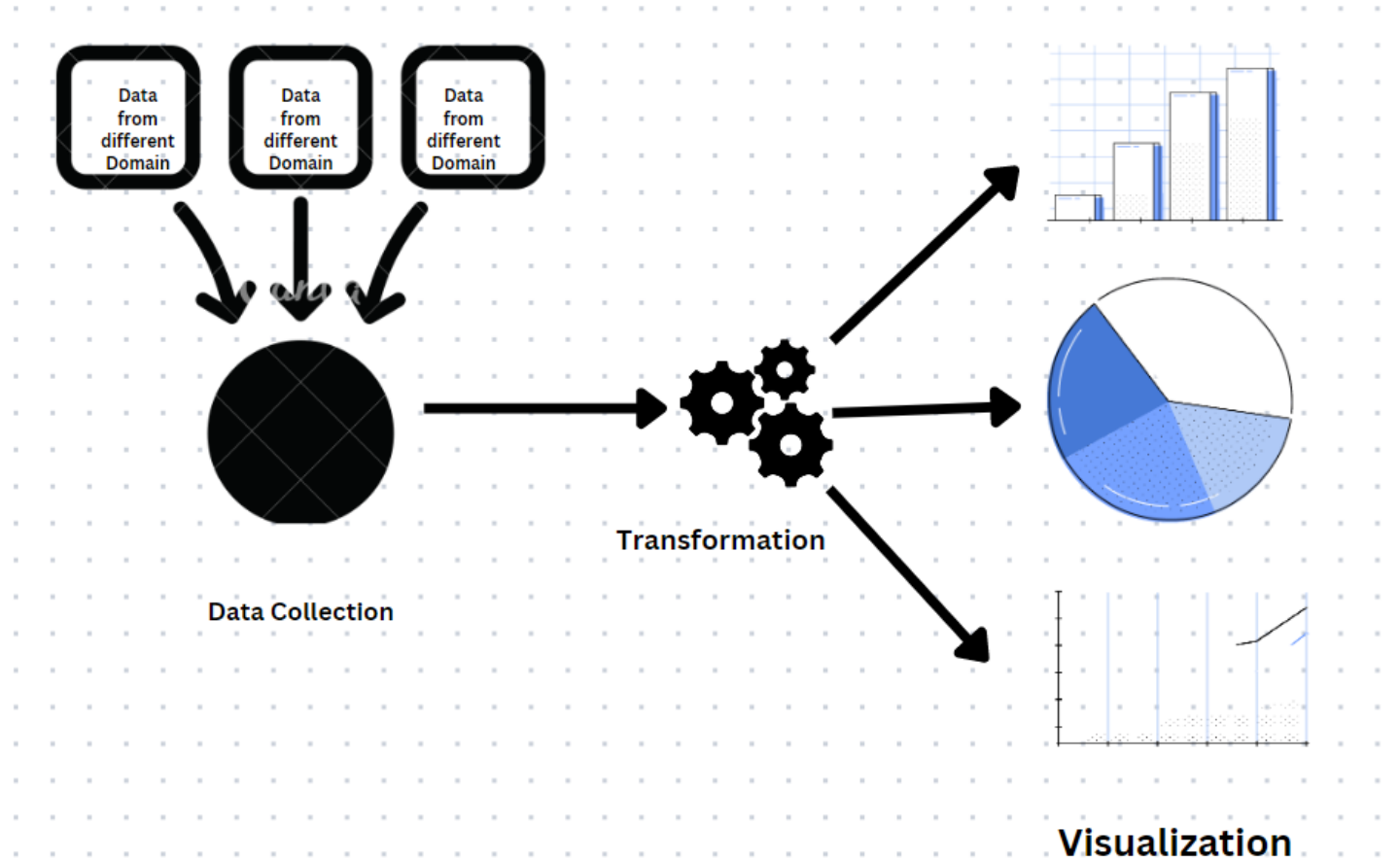Aadarsha Chapagain (C0825975)
Rajasekhar katta (C0833766)
Venkata sai manikanta Ponakala (c0833772)
Rishi Phaneendra Varma Bhupathi Raju(C0825285)

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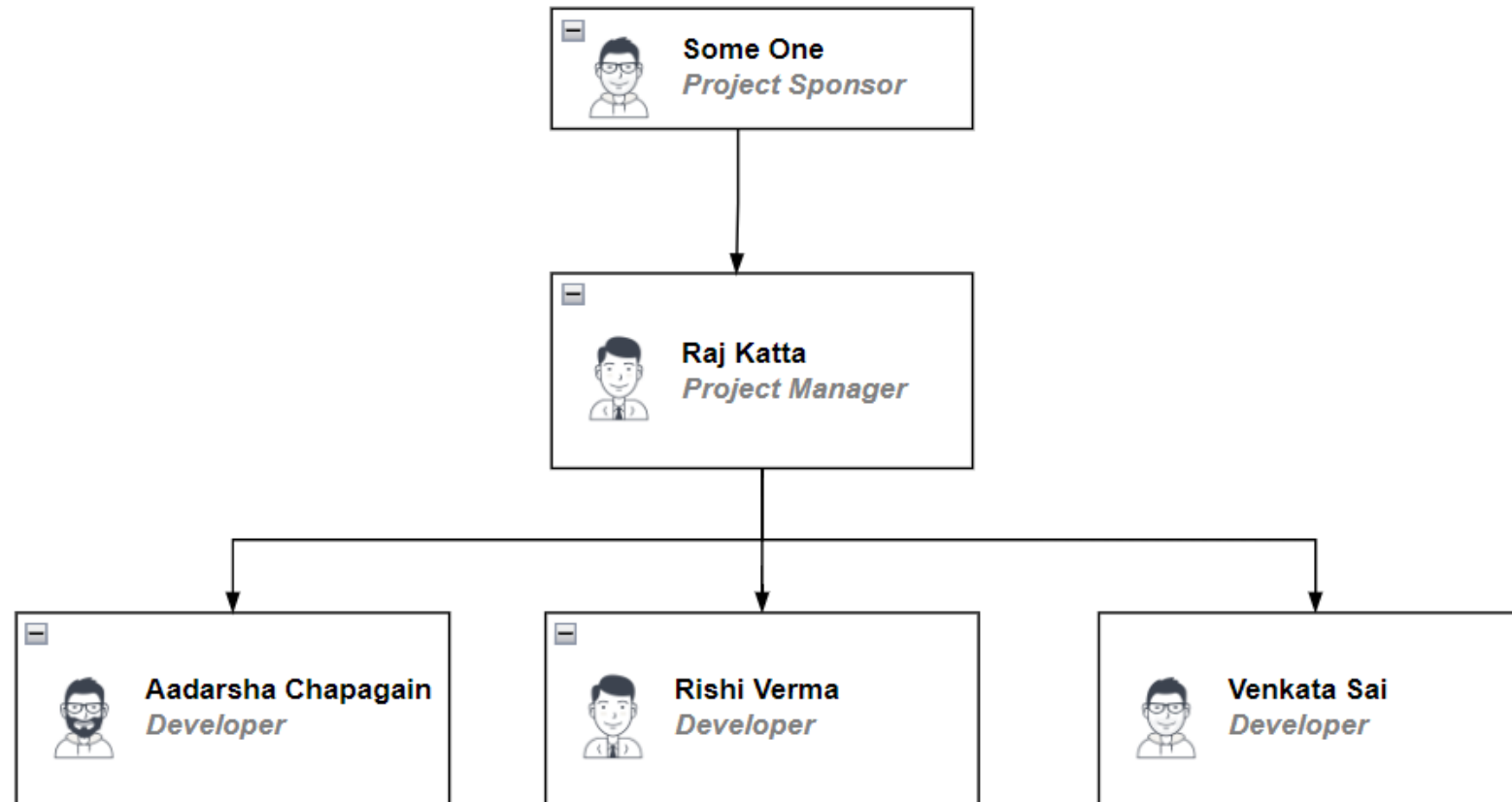- Product Description

What is DataVerse

Data from different Domain · Data from different Domain · Data from different Domain

Data Collection

Transformation

Visualization

Project Title and description

- Financial institutions are struggling to get insights from their data

- Excel is not enough to handle huge amount of data

- Just Accumulating data won't add any value to organization

- Companies utilizing data as an information assets are ahead of the game

- **Dataverse** is a data visualization project where data from financial institutions will be collected, transformed and visualized
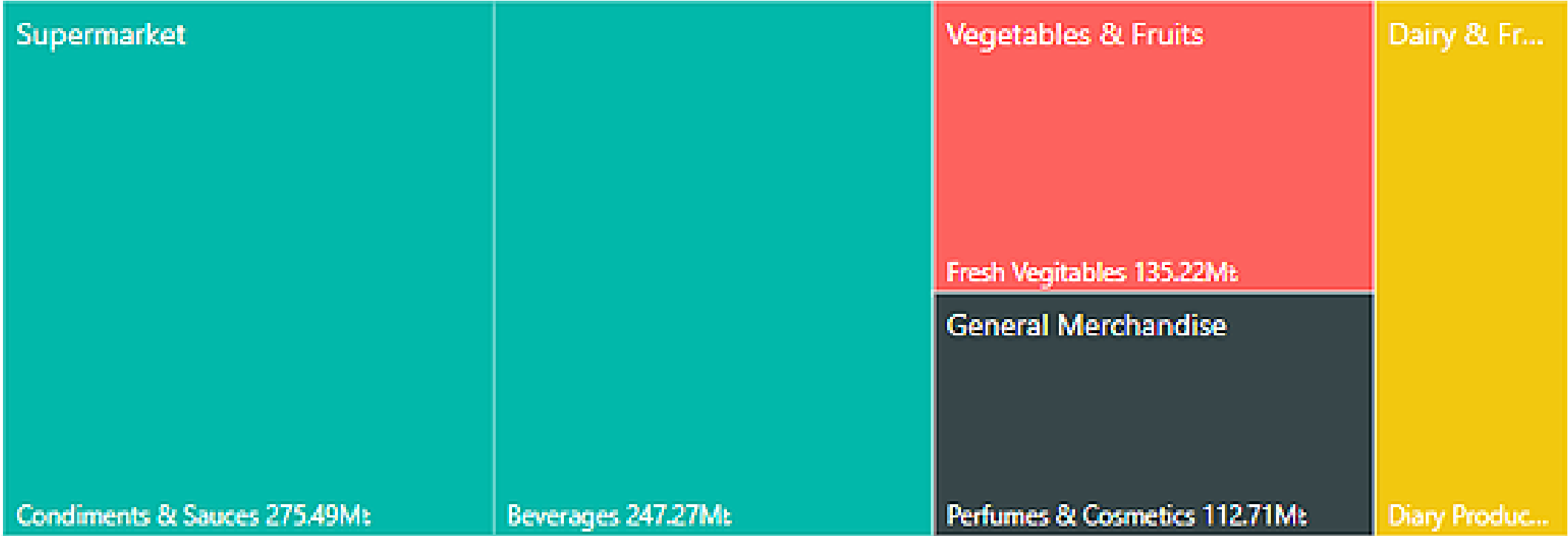
Project Team

Business Case

- This project targets banking customers when and how they are likely to be most amenable to making a purchase.

- This provides information to help optimize banking marketing efforts. This knowledge can involve anything. Client may design a new product or service and know when and where to market them.

- Additionally, if a client experiencing a slowdown in sales, the data will provide insights into what is wrong.

Credit card spending Visualisation

Top 5 Purchase Areas

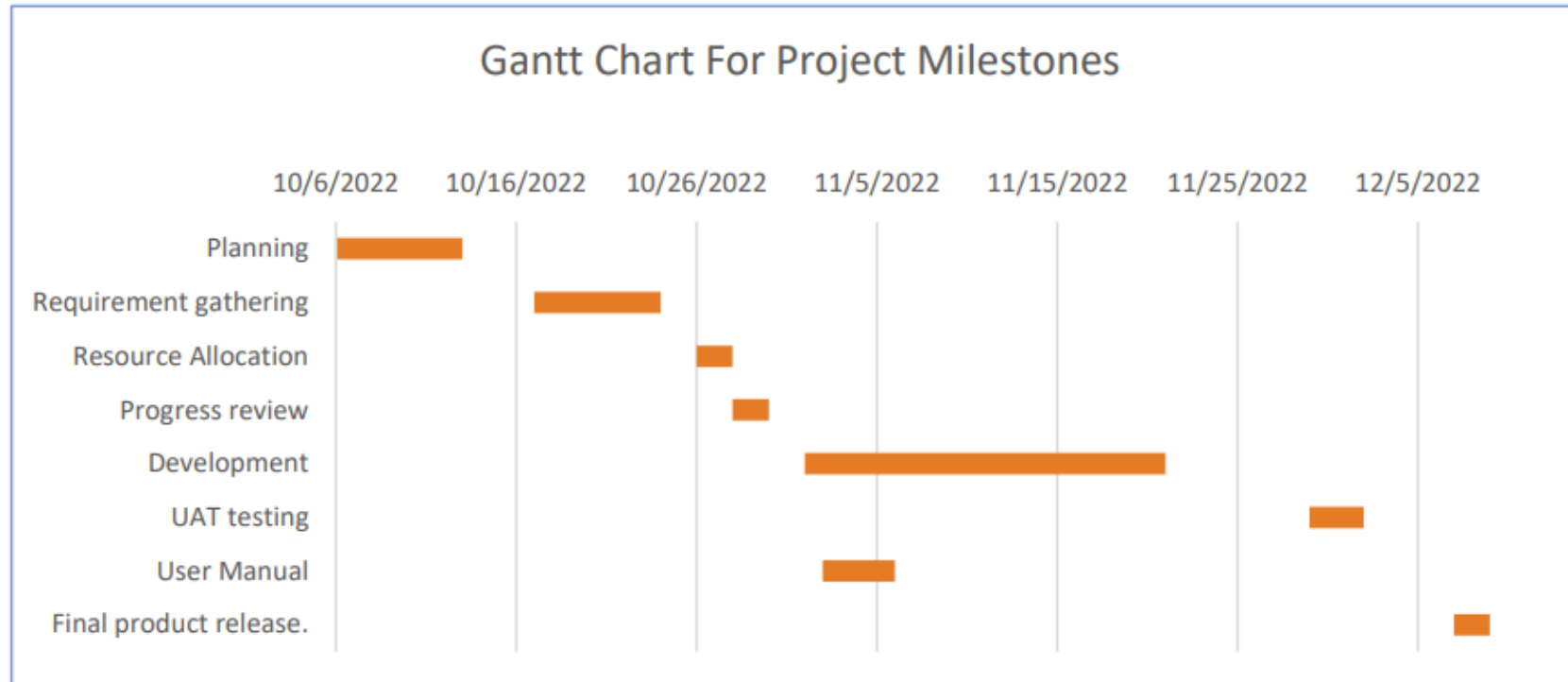|			
Supermarket		Vegetables & Fruits	Dairy & Fr...
		Fresh Vegitables 135.22Mt	
		General Merchandise	
Condiments & Sauces 275.49Mt	Beverages 247.27Mt	Perfumes & Cosmetics 112.71Mt	Diary Produc...

Technology & Resource

- **This project leverages Microsoft Azure Public Cloud services as Pay-as-you-Go subscription to avoid capital investments and operational maintenance.**

- Rajasekhar katta will be the Project Manager and Data modeler.

- Rishi Varma will be appointed as Data Engineer.

- Aadarsha Chapagain will be an Azure Devops developer.

- Venkata Sai Manikanta will be PowerBI developer.

WBS

Task	Start Date	End Date	Duration
Planning	10/6/2022	10/17/2022	7
Requirement gathering	10/17/2022	10/26/2022	7
Resource Allocation	10/26/2022	10/28/2022	2
Progress review	10/28/2022	11/1/2022	2
Development	11/1/2022	11/29/2022	20
UAT testing	11/29/2022	12/2/2022	3
User Manual	11/2/2022	11/8/2022	4
Final product release.	12/7/2022	12/9/2022	2

WBS contd.

Gantt Chart For Project Milestones

Key Stakeholder List

- Customers

- Project Manager

- Project Team Members

- Company Executives

- Project Sponsor

- Steering Committee

  - An Advisory group providing guidance on key decision's on sponsor, executives and key stakeholders

Stakeholder Requirements as known

- Business unit: Enterprise Business Intelligence (EBI)
- Business Operations
- Customers
- Subject Matter Experts

Product Description

- This project aims to help the clients by reaching the banking customers and shows when they are most likely to be open to making a purchase.

- By creating the PowerBI dashboard with all the required data the client can access lot of information about their customers spending patterns in a simple way.

- This will provide the information about the customers purchase history, their spending limits and many more.

Key Deliverables

- Customers spending patterns

- Big purchases in last 6 months

- How many times they exceed the credit limit in past 2 years

- Repaying on time or not

- Their top 5 spending product categories

- All these insights will be presented on PowerBI Dashboard

Assumption Made

- Project costs are within the budget

- Always keep track of resources

- Determine the changes to the project precisely that will affect project progress,

- All team resources complete work on time,

- Project timeline can be met

Constraints

- WBS must complete within 2 weeks

- Cost

- Scope

- Set of deliverables that a project manager gaurantees

Project approval requirements

- Governmental requirements,
- Capital Requirements,
- Operational requirements

Project Risks

- Project purpose and need is not well defined

- Project design and deliverables definition is incomplete

- Project schedule is not clearly defined

Project exit criteria

- Verify all tests planned have been run

- Verify all technical requirements have been met

- Verify all quality issues has been resolved

- All results are captured and documented

- All test metrics are collected environment is backup up

References

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