Transfer excel formulas to Power queries in Microsoft Power BI

1. **Customer name** : Daphna Kaufman
   daphnaKaufman10@gmail.com
2. **The existing situation**: Statistical models with many records take a lot of calculation time (sometimes hours. The reason for that is because excel as a tool is not meant to handle calculations in Macro of a big amount of records (100,000-1,000,000).
3. **The project's target:**
   a. Use Power queries in Microsoft Power BI to be able to run calculations of a big amount of records to gain a faster calculator time (seconds to minutes).
   b. This project is a paid pilot project that if successful it will continue to many other models.
   c. The project will include transfering of existing excel formulas into Power queries in Microsoft Power BI.

4. **The job of the contractor will include:**
   a. Transfering of existing excel formulas into Power queries in Microsoft Power BI.
   b. Run a large amount of data (100,000 records) using the formulas built in Power queries in Microsoft Power BI in a fast speed (seconds to few minutes). For this, the customer Daphna will provide an excel file of one entity records. The contractor will general 100,000 sample copies of this one sample file and then will run the model using the POWER QUERY on all 100,000 files with the transfer formulas from Excel in Microsoft Power BI.
   c. The formulas coding will be in the most possible simple coding way .
   d. Each code line will be explained in a comment.

5. **Expected deliveries by the contractor:**
    a. A full delivery of a running model in Power queries in Microsoft Power BI using the transferred excel formulas.
    b. A live demonstration in a zoom meeting using screen share of a run of 100,000 files which are a copy of the sample excel file to be given by the customer.
    c. The code will be fully opened to the full detailed review and editing by the customer without any code protection.
    d. The contractor will review and explain the code, line by line to the customer.
    e. The contractor will provide detailed training of the customer on the model.
    f. 5-10 hours of support during the first month after delivery of the model. The customer will decide if you use emails for answers and questions or a zoom meeting.
    g. The contractor will sign an NDA document to be provided by the customer.

6. **Project expected delivery time:** 31/07/2023.

7. **Price proposal:**
    a. The contractor will provide a price proposal with a payment by stages.
    b. The last 20% will be paid after the 30 days of support.
    c. The contractor will provide a price proposal for more paid support hours after the project is completed (cost per hour).

8. **Information to be delivered by the customer Daphna**
    a. Explain the project in a zoom meeting.
    b. Answer questions as needed by the contractor during the project time.
    c. Provide an excel sample with all excel formulas shown in the excel formula cells.
    d. Explain the formulas logic in the excel sample model.

Some examples of the excel sheet explanation

1. **A data sheet named DATA**

   In the sheet there is a breakdown in each line for an identity card with all the relevant information for the calculation. There can be tens of thousands of rows (up to about a million). The fields are received from other Excel or CSV files .

2. **A sheet of tables named TABLES and named Improvements**
   The sheets have several tables in different structures that must be used for the calculations

3. **A sheet of formulas called ZIKNA**
   In this sheet all the formulas are performed. Initially some of the data is read for T.Z. certain according to the key. With the help of this data, future flows are calculated .

4. **Sheets of results**
   In the required development, 3 results must be presented in different structures:
   1. Capitalized sum of the flows (in fields ae2 - aj2) - 6 results (which are usually copied later back to the DATA sheet)
   2. Flows that can be totaled for all possible options in combinations between TYPE and GROUP according to the structure shown in columns AP - AU
   3. The presentation of the data for each PO According to the structure shown in columns AW - AX

5. **Support and guidance**
   At the end of the project and after tests of the speed and correctness of the calculations, I will request a few hours of

training as well as support for questions and problems in the future as needed.