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|  | **THE MIZUHO SECURITIES**  **ASIA LIMITED** |

**MHSA DAILY performance report dashboard production rollout procedures**

**For**

**DATA AnalyticS**

**Platform**

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| Prepared by | Eastech Systems Limited |
| Document Version | v0.1 |
| Date | Dec 2, 2024 |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Author** | **Version** | **Description** |
| 2nd Dec, 2024 | Ellis Chiang | v0.1 | Document Created. |
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# MHSA Daily Performance Report Dashboard Rollout Procedures

# Python Programs Deployment

## Deploy Python programs to application server hkapplnsvr

List of Python programs

* pbi\_mhsa\_performance\_report\_excel\_reader.py
* pbi\_unallocated\_trade\_extraction.py

Copy folder “hksyn” to D:\BOPython on application server hkapplnsvr

# RunMyJob Configuration

## Promote Process and Chain Definition to production

List of Process Definitions

* PD\_HKSYN\_PBI\_Inject\_Unallocated\_Trade\_From\_MOS\_Export
* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles
* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles\_Post\_Python
* PD\_HKSYN\_PBI\_TableETL

List of Chain Definitions

* CD\_HKSYN\_PBI\_SharePoint\_InputFiles

# Initial Data Load (IDL)

## IDL for Power BI Tables

Trigger the following process manually to load MDW data (can be done in ADF in advance)

* PD\_HKSYN\_PBI\_TableETL (submission parameters: PAR\_initLoad = true)

## IDL for MOS Exported Excel Files

Trigger the following process definition manually to load MOS data

* PD\_HKSYN\_PBI\_Inject\_Unallocated\_Trade\_From\_MOS\_Export

## IDL for MHSA Daily Performance Report Excel Files

Trigger the following process definition manually to copy input files from SharePoint

* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles

Fix the formatting of the following MHSA Daily Performance Report in the target folder (\\hkg\hk\Applications\DataAnalytics\OPS Daily Performance Report)

Remove additional column C:

* MHSA and MHSS and MMFS – Daily Performance Report Template\_20240710.xlsx
* MHSA and MHSS and MMFS – Daily Performance Report Template\_20240724.xlsx

Change the value from “No” to “0” in row 27 column F in worksheet “MHSA”

* MHSA and MHSS and MMFS – Daily Performance Report Template\_20240726.xlsx

Trigger the following process definition manually to load the MHSA Daily Performance Report data

* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles

# Synchronize RMJ Process and Chain Definition

After completing the initial data load, synchronize the following jobs in RMJ to activate the schedule:

List of Process Definitions

* PD\_HKSYN\_PBI\_Inject\_Unallocated\_Trade\_From\_MOS\_Export
* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles
* PD\_HKSYN\_PBI\_Inject\_SharePoint\_InputFiles\_Post\_Python
* PD\_HKSYN\_PBI\_TableETL

List of Chain Definitions

* CD\_HKSYN\_PBI\_SharePoint\_InputFiles

# Deploy Power BI Dataset and Update Power BI App

## Upload Power BI Dataset

1. Log in to the Power BI service portal with the user account app\_hk\_pbiprd\_ro.
2. Navigate to folder HKSYNP01 in Workspace5 and upload the Power BI data set (MHSA Daily Performance Report.pbix) to Workspace5.

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1. Click the “Replace it” button when being prompted on a dataset with the same name already exists.
2. Navigate back to folder HKSYNP01 in Workspace5 and click the ellipse button of the MHSA Daily Performance Report Semantic model. From the manual, select “Settings”

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1. In the Settings pane, expand “Parameters” and edit the connection details as follows,

* ServerName: hksynp01syn.sql.azuresynapse.net
* DbName: hksynp01sql
* SchemaName: dbo

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1. Click the “Apply” button to change the parameters, and press F5 to reload the page so that the changes take effect.
2. In the “Setting” pane, expand “Gateway and cloud connections” from the Settings pane. In the “Maps to:” drop-down list, select “Dedicated SQL Pool (PRD)”

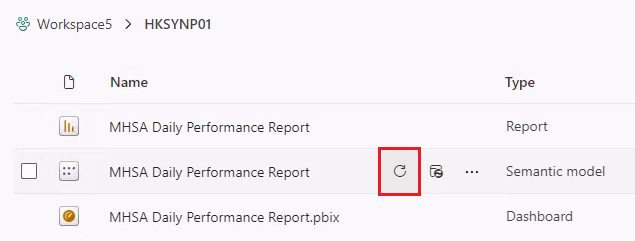
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1. Click the “Apply” button to change the gateway connection settings.

## Refresh Power BI Dataset

1. Navigate back to folder HKSYNP01 in Workspace5 and click the refresh button of the MHSA Daily Performance Report Semantic model to refresh the dataset.



1. Wait for the refresh to complete, and the timestamp in the refreshed column will update when it is done.

## Update Power BI App

1. Navigate back to folder HKSYNP01 in Workspace5 and click “Update app” on the top right corner.

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1. If there is a need to update the Power BI Apps distribution list, go to the “③ Audience” tab and grant access to specific users or groups by using the “Edit Audience” pane on the right-hand side.

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1. Click the “Update app” button on the lower right corner to update the content of the Power BI Apps.