

Overview: CRE Report for the Board (Semi-Annual)

This project aims to create clean visualizations and analysis of the Commercial Real Estate portfolio for a semi-annual presentation to the board. The data comes directly from the COCC core database and is segmented into different categories based on FDIC Category Code. There is a reconciliation step to the numbers we report on the quarterly Fed Call Report to ensure accuracy. The end output is a PowerBI dashboard with several visualizations that are put on a slide deck.

Authors & Stakeholders

- Developed by:
 - Chad Doorley (chad.doorley@bcsbmail.com)
- Key Stakeholders:
 - Tim Chaves, Linda Sternfelt

File Paths

- Project Home:
 - \00-da1\Home\Share\Data & Analytics Initiatives\Project Management\Credit_Loan_Review\CRE_Reporting_Board
- End User Access:
 - \00-da1\Home\Share\Line of Business_Shared Services\Credit_Loan_Review\CRE_Reporting_Board

Documentation Structure

- [Project Technical Documentation](#): Comprehensive technical details and ongoing changes are documented here. Filters, calculations,
- [Daily Notes](#): Captures day-to-day development activities, questions, and filters. This is aimed at developers joining the project and aiming to understand all the technical decisions that were made during the development process. This will evolve during the development process and subsequent version updates

What's New

Chad rebuilt this to be streamlined for future use, with easy reconciliation and checks to the call report. It flows into a PowerBI dashboard that will refresh once the data is refreshed.

Please check out the technical documentation & daily notes for more in-depth updates.