



Credit Union Overcame Power BI Limitations with Complex Matrix Visual

About Client

This case study showcases how Clarion, a trusted technology partner, successfully addressed a critical challenge faced by the client – a Credit Union, a leading banking institution in Biloxi, USA. The Credit Union sought to implement the Drill Through feature in Power BI for their Matrix visual, which involved data extracted using DAX formulas. However, they encountered limitations that prevented Drill Through from functioning as expected. This case study highlights the innovative solution developed by Clarion to overcome these obstacles and achieve the desired outcomes.



Industry:
Banking



Location:
USA



Partnership Tenure:
Since 2021



Technologies:
Power BI

The Business Need!

The client encountered several challenges while attempting to implement the Drill Through feature in Power BI for their Matrix visual. The primary issue was that Drill Through did not work when the data was extracted using DAX formulas. This posed a significant problem as Drill Through was a crucial selling point and a key feature for their Service Report.

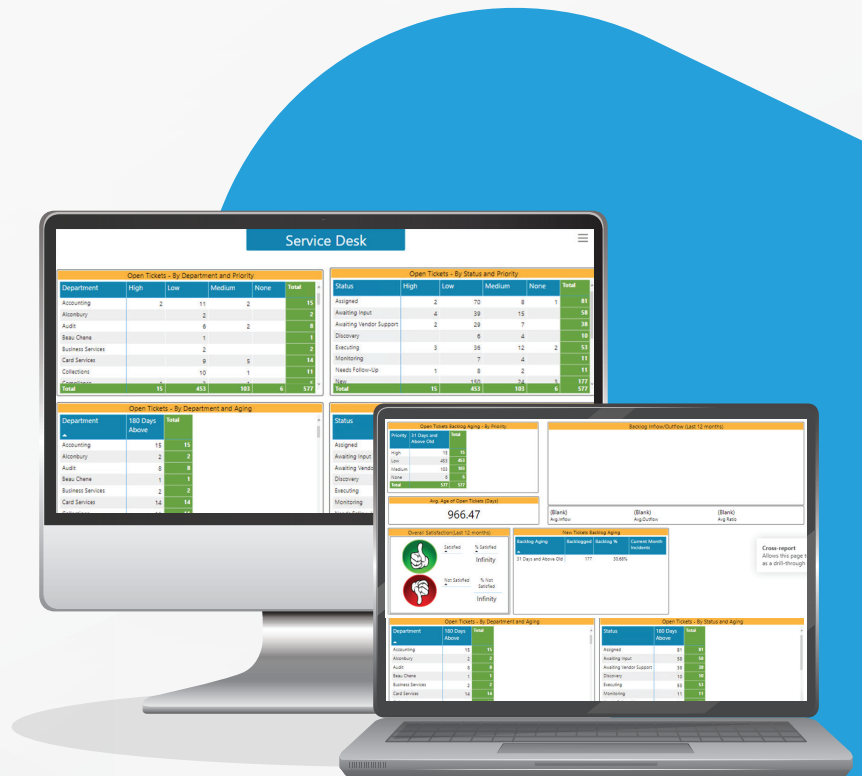
Power BI's limitation in detecting filters within DAX-based Matrix visuals further hindered the desired functionality. Despite extensive searches on Power BI forums, Telegram groups, and online resources, no viable workarounds were found to address these issues.



How did Clarion Create Value for the Client?

Clarion devised an innovative solution to overcome the Credit Union's challenges. We implemented a unique approach to enable Drill Through in the Matrix visual with DAX-extracted data. Our experts created dynamic tables for each column in the Matrix visual, allowing the separation of data for different periods such as Week, Month, and Quarter. These tables were dynamically generated at runtime to optimize data size and performance, eliminating the need for additional data extraction from the database.

Using DAX to combine these dynamically generated tables into a single consolidated table, Clarion enabled Power BI to implement the Drill Through functionality effectively. This solution provided a reliable workaround unavailable through standard Power BI resources.



Customer's Journey

ENGAGEMENT

Four-month engagement with Clarion for the client.

VALIDATION

Positive feedback from end users, validating report success.

VISUALIZATION

Developed critical business logic in Power BI with insightful visuals.

CONTINUITY

Ongoing project with client for Sprint Power BI reporting

INITIATION

Initiated a Service Desk report, expanded to three more Power BI projects.

CONSISTENCY

Sprint goals consistently met, with extra work completed within sprints.

RECOMMENDATION

Clarion advised shifting to Power BI Service for a better user experience.

Business Outcomes:



Clarion's solution successfully implemented several positive business outcomes for our client. First and foremost, the main selling point feature of the Service Desk Report was achieved, allowing end users to drill down into details and analyze their reports more comprehensively. This feature's success also extended to SLA-based reports, enhancing the overall reporting capabilities of the organization.

By addressing the initial challenge and providing the desired Drill Through functionality, Clarion played a crucial role in positively impacting end users' experience and satisfaction. The successful outcome of this project also reinforced the confidence and trust of the Credit Union in Clarion as a reliable technology partner for future endeavors.

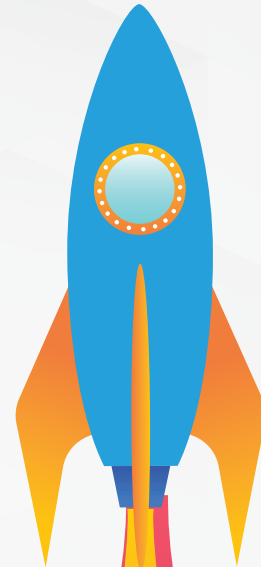


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Conclusion:

Clarion's expertise in Power BI and innovative problem-solving approach enabled the Credit Union to overcome the limitations of Drill Through in complex Matrix visuals. The successful implementation empowered end users with enhanced reporting capabilities and ensured the accomplishment of critical business objectives. By addressing the specific pain points of the client, Clarion demonstrated its commitment to delivering tailored solutions and driving digital transformation in the banking industry.



Get in Touch

We have worked on numerous web development projects and developed expertise in creating mobile apps that meet our client's requirements.

If you are looking for dependable web development partners, why settle for anything less than the best? Join hands with Clarion Technologies and take a quantum leap in your mobile and web development project! You will be more than satisfied with the results.



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