



Data Refresh Guide

Refreshing the dashboard data

Steps for Larkspur's IT staff to refresh the data, confirm the numbers, and handle a change in the export's columns.

Sample data. All names, organizations, and figures are fictional.

How the refresh works

The loan origination system writes a new copy of Larkspur Data Tables.xlsx to the Reporting folder of the Credit Operations SharePoint site at about 5:00 AM each weekday. Power BI refreshes the semantic model at 6:30 AM, and both dashboards read from that model, so one refresh updates both reports. Most days nothing needs to be done, and this guide is for the days when a refresh fails or the numbers look wrong.

Refreshing by hand

1. Confirm the export finished. Open the Reporting folder and check that the workbook's modified time is from this morning and that the file is not open in Excel by anyone, because an open file can block the refresh.
2. In the Power BI service, open the workspace, find the Larkspur Operations semantic model, and choose Refresh now.
3. Watch the refresh history on the model's settings page. A normal refresh finishes in under two minutes with this volume of data.
4. Open the About sheet of the workbook and compare its Reconciliation totals (applications, funded volume, workflow actions, document requests) with the report's cards, with every slicer cleared. They should match exactly.
5. Check the date at the bottom of the navigation panel. It should show the last business day.

If the refresh fails

What you see	Likely cause	What to do
Credentials error	The service account's password changed or its sign-in expired.	On the model's settings page, edit the data source credentials and sign in with the service account.
File not found	The workbook was renamed or moved.	Restore the original name and folder, or update the Source step in each query to the new location.
Totals do not match the About sheet	Part of the export was empty or a column changed.	Check row counts on the About sheet first, then follow the column steps below.
Month-end turn time looks wrong	The Calendar sheet is missing next year's holidays or months.	Ask the system owner to extend the Calendar sheet, then refresh.

When the export adds or drops columns

Vendors add fields to exports and occasionally rename or remove them. The model is built so that this does not stop the refresh, but someone still needs to decide whether a change matters. Each query starts with a step named Keep expected columns (shown below in the Advanced Editor) that lists exactly which columns the model uses:

```
#"Keep expected columns" = Table.SelectColumns(  
    Source,  
    {"ApplicationID", "ReceivedDateTime", "ReceivedDate", "ChannelID", "PartnerID",  
     "EquipmentCategory", "Status", "FundedDate", "FundedAmount", "TurnTimeBusinessDays", ...},  
    MissingField.UseNull  
)
```

Because of that step, a new column is ignored until someone adds it to the list, and a missing column loads as empty instead of stopping the refresh. The trade-off is that a missing column fails quietly, which is why the reconciliation check after each refresh matters.

Change in the export	What happens in the report	What to do
A new column appears	Nothing changes. The new column is not loaded.	No action is needed. If the business wants to use it, add its name to Keep expected columns, set its data type in the Changed type step, and refresh.
A column the model uses is missing	The refresh succeeds, but visuals that use the column go blank or show zero, and the totals stop matching the About sheet.	Ask the system owner whether the field was removed or renamed. Until it is back, add a note to the report so readers know which numbers are affected.
A column is renamed	The old name loads as empty and the new name is ignored.	Add a Rename columns step before Keep expected columns that maps the new name to the old one, so every measure keeps working without edits.
A column changes type (for example, an amount arrives as text)	The Changed type step marks bad values as errors, and those rows show as blank in totals.	In Power Query, select the column and use Keep errors to see the bad values, then fix the type step or ask for a corrected export.
Columns move to a different order	Nothing changes, because queries find columns by name.	No action is needed.

Making a column change

1. Download the .pbix file from the shared Reporting folder and open it in Power BI Desktop.
2. Choose Transform data, select the affected query, and open the Keep expected columns step.
3. Edit the column list or add a Rename columns step, then confirm the preview shows values in the column.
4. Choose Close and apply, check the cards against the About sheet, and publish back to the same workspace so the schedule and credentials stay in place.
5. Save the updated .pbix to the Reporting folder and note the change and the date in the change log tab of the Technical Reference.