



Power BI rebuild guide

Operations Workflow Dashboard

Everything needed to rebuild this dashboard in Power BI Desktop: data loading, model, every DAX measure, and the visuals on each page.

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

This guide lists everything needed to rebuild the Operations Workflow Dashboard in Power BI Desktop from the sample data in this folder. The HTML dashboard (`dashboard/Operations Workflow Dashboard.html`) shows what the finished report should look like, and the screenshots show each page. The report has 7 pages and should take about an hour to rebuild.

1. Files you need

- `data/Larkspur Data Tables.xlsx` : ten Excel tables (one per sheet) plus an About sheet with reconciliation totals. The same tables are in `data/csv/` if you prefer CSV.
- `rebuild/Larkspur Theme.json` : colors, fonts, and visual defaults.
- This guide, which holds every measure in DAX.

2. Load the data

1. In Power BI Desktop, choose Get data > Excel workbook and open `Larkspur Data Tables.xlsx`.
2. In the Navigator, check the ten tables whose names start with `tbl` (not the sheets), then choose Transform data.
3. Rename each query to drop the `tbl` prefix and restore spaces: Applications, Workflow Actions, Document Requests, Officers, Channels, Equipment Categories, Partners, Sales Reps, States, Calendar.
4. Set data types using the table below, then choose Close and apply.

Column pattern	Set the data type to	Examples
Every ID column	Text	ApplicationID, RequestID, PartnerID, OfficerID, RepID, ChannelID, StateCode, StateFIPS (keeps the leading zero, as in 01)
Columns ending in DateTime	Date/time	ReceivedDateTime, DecisionDateTime, FileCompleteDateTime, ActionDateTime, RequestedDateTime
Date columns	Date	ReceivedDate, FundedDate, OnboardDate, HireDate, StartDate, Calendar[Date]
Amounts	Fixed decimal number, formatted as currency	RequestedAmount, FundedAmount, ApprovaLimit
Business-day durations	Decimal number	TurnTimeBusinessDays, DecisionWaitBusinessDays, WaitBusinessDays

Column pattern	Set the data type to	Examples
Counts and calendar numbers	Whole number	DocumentRequests, ActionCount, BusinessDayOfMonth, BusinessDaysLeftInMonth

3. Calculated tables and columns

The Calendar table comes from the workbook, because the business-day columns (holidays, business days left in the month) are maintained in the source. Mark it as the date table on `Calendar[Date]`, then add two columns to it with **New column**: `Month Start = DATE ( YEAR ( Calendar[Date] ), MONTH ( Calendar[Date] ), 1 )`, `Month = FORMAT ( Calendar[Date], "mmm yyyy" )`, and `Quarter = "Q" & QUARTER ( Calendar[Date] ) & " " & YEAR ( Calendar[Date] )`. Sort Month by Month Start.

Create these on the Modeling tab with **New table**:

Flow Stage

```
Flow Stage =
DATATABLE (
    "Stage", STRING, "Sort", INTEGER,
    {
        { "Received", 1 }, { "Decided", 2 }, { "Approved", 3 },
        { "Contract sent", 4 }, { "Contract signed", 5 }, { "Funded", 6 }
    }
)
```

Pipeline Stage

```
Pipeline Stage =
DATATABLE (
    "Stage", STRING, "Sort", INTEGER,
    {
        { "Submitted", 1 }, { "Approved", 2 }, { "Contract sent", 3 },
        { "Contract signed", 4 }, { "Funded", 5 }
    }
)
```

Score Bins

```
Score Bins =
SELECTCOLUMNS ( GENERATESERIES ( 0, 95, 5 ), "Bin", [Value] )
```

Score Threshold

```
Score Threshold =
DATATABLE ( "Score Threshold", INTEGER, { { 35 }, { 45 }, { 55 }, { 70 } } )
```

Add these calculated columns with **New column** on the table named in each heading:

Applications[File Complete Date]: Date the last requested document arrived.

```
File Complete Date =
DATE ( YEAR ( Applications[FileCompleteDateTime] ), MONTH ( Applications[FileCompleteDateTime] ), DAY
( Applications[FileCompleteDateTime] ) )
```

Applications[File Complete Days Left]: Business days left in the month when the file was complete.

```
File Complete Days Left =  
LOOKUPVALUE ( Calendar[BusinessDaysLeftInMonth], Calendar[Date], Applications[File Complete Date] )
```

Applications[File Complete Window]: Month-end window flag used on the Turn time page.

```
File Complete Window =  
IF (   
    ISBLANK ( Applications[File Complete Days Left] ), BLANK (),  
    IF ( Applications[File Complete Days Left] <= 2, "Last 3 business days", "Rest of month" )  
)
```

Applications[Days Left Bucket]: Axis for the decision wait chart, sorted by Days Left Sort.

```
Days Left Bucket =  
VAR d = Applications[File Complete Days Left]  
RETURN  
    IF ( ISBLANK ( d ), BLANK (), IF ( d >= 10, "10+", IF ( d = 0, "Last day", FORMAT ( d, "0" ) ) ) )
```

Applications[Days Left Sort]: Sort column for Days Left Bucket.

```
Days Left Sort =  
VAR d = Applications[File Complete Days Left] RETURN IF ( ISBLANK ( d ), BLANK (), 10 - MIN ( d, 10 )  
)
```

Applications[Exit Point]: Where applications that did not fund left the process.

```
Exit Point =  
SWITCH (   
    TRUE (),  
    Applications[Status] = "Declined", "Declined",  
    Applications[Status] = "Reversed", "Approval reversed",  
    Applications[Status] = "Withdrawn" && ISBLANK ( Applications[Decision] ), "Withdrawn while  
documents were pending",  
    Applications[Status] = "Withdrawn", "Withdrawn after approval",  
    Applications[Status] = "In progress", "Still in progress",  
    BLANK ()  
)
```

Applications[Outcome Group]: Outcome group for the sales pages.

```
Outcome Group =  
SWITCH (   
    Applications[Status],  
    "Funded", "Funded",  
    "Declined", "Declined",  
    "In progress", "In progress",  
    "Withdrawn or reversed"  
)
```

Channels[Channel Comparison]: Legend for the conversion trend line.

```
Channel Comparison =  
IF ( Channels[Channel] = "Independent broker", "Independent broker", "All other channels" )
```

Equipment Categories[Category Comparison]: Legend for the document wait trend line.

```
Category Comparison =  
IF ( 'Equipment Categories'[EquipmentCategory] = "Medical", "Medical", "All other categories" )
```

Set these sort-by-column options: Days Left Bucket by Days Left Sort, Channels[Channel] by Channels[SortOrder], 'Equipment Categories'[EquipmentCategory] by its SortOrder, and the Stage column of both stage tables by its Sort column.

4. Relationships

Delete any relationships Power BI detected on its own, then create these in Model view. All are many-to-one with single cross-filter direction. Inactive relationships are switched on inside specific measures with USERELATIONSHIP.

From (many side)	To (one side)	Active	Note
Applications[ReceivedDate]	Calendar[Date]	Yes	Filters by the date the application was received
Applications[FundedDate]	Calendar[Date]	No (inactive)	Used by funded measures through USERELATIONSHIP
Applications[ChannelID]	Channels[ChannelID]	Yes	
Applications[EquipmentCategory]	'Equipment Categories'[EquipmentCategory]	Yes	
Applications[OfficerID]	Officers[OfficerID]	Yes	The credit officer assigned to the application
Applications[PartnerID]	Partners[PartnerID]	Yes	Blank for direct and marketplace applications
Partners[RepID]	'Sales Reps'[RepID]	Yes	Rep filters reach applications through Partners
Applications[StateCode]	States[StateCode]	Yes	Location of the borrowing business
'Workflow Actions'[ApplicationID]	Applications[ApplicationID]	Yes	Actions inherit every application filter
'Document Requests'[ApplicationID]	Applications[ApplicationID]	Yes	Requests inherit every application filter

The Flow Stage, Pipeline Stage, Score Bins, and Score Threshold tables have no relationships.

5. Theme and page setup

1. View > Themes > Browse for themes, then choose `Larkspur Theme.json`.
2. Format page > Canvas settings: Custom, 1600 by 1000 pixels, to match the screenshots. The default 16:9 page also works.
3. The HTML version uses the IBM Plex Sans typeface. The theme uses Segoe UI, which every Windows computer has, so the report looks the same for everyone who opens it.

- Place a rectangle down the left side in #1C1F3A for the navigation rail and add page navigator buttons, or use the built-in page tabs.

6. Measures

Create a blank table named **_Measures** to hold the measures (Home > Enter data > Load), then add each measure below and set its display folder and format. This report uses 42 measures.

Core

Applications (Whole number). Count of applications in the current filter context.

```
Applications =  
COUNTROWS ( Applications )
```

Decided Applications (Whole number). Applications with a credit decision recorded.

```
Decided Applications =  
CALCULATE ( [Applications], NOT ISBLANK ( Applications[Decision] ) )
```

Approved Applications (Whole number). Applications approved, including approvals later reversed.

```
Approved Applications =  
CALCULATE ( [Applications], Applications[Decision] = "Approved" )
```

Declined Applications (Whole number). Applications declined.

```
Declined Applications =  
CALCULATE ( [Applications], Applications[Decision] = "Declined" )
```

Approval Rate (Percentage, 1 decimal). Approved share of decided applications.

```
Approval Rate =  
DIVIDE ( [Approved Applications], [Decided Applications] )
```

Funded Applications (Whole number). Applications that funded, counted by the date received.

```
Funded Applications =  
CALCULATE ( [Applications], Applications[Status] = "Funded" )
```

Funding Conversion (Percentage, 1 decimal). Share of applications received that went on to fund.

```
Funding Conversion =  
DIVIDE ( [Funded Applications], [Applications] )
```

Funded Deals (Whole number). Deals counted by the date they funded, using the inactive FundedDate relationship.

```
Funded Deals =  
CALCULATE (  
    [Funded Applications],  
    USERELATIONSHIP ( Calendar[Date], Applications[FundedDate] )  
)
```

Funded Volume (Currency, no decimals). Dollars funded in the selected months, by funding date.

```
Funded Volume =
CALCULATE (
    SUM ( Applications[FundedAmount] ),
    USERELATIONSHIP ( Calendar[Date], Applications[FundedDate] )
)
```

Funded Volume by Received Date (Currency, no decimals). Dollars funded on applications received in the selected months. Used where the page compares groups of applications.

```
Funded Volume by Received Date =
SUM ( Applications[FundedAmount] )
```

Average Deal Size (Currency, no decimals). Average funded amount per deal.

```
Average Deal Size =
DIVIDE ( [Funded Volume], [Funded Deals] )
```

Contracts Sent (Whole number). Applications with a contract sent to the customer.

```
Contracts Sent =
CALCULATE (
    DISTINCTCOUNT ( 'Workflow Actions'[ApplicationID] ),
    'Workflow Actions'[ActionType] = "Contract sent"
)
```

Contracts Signed (Whole number). Applications with a signed contract.

```
Contracts Signed =
CALCULATE ( [Applications], Applications[ContractSigned] = "Yes" )
```

Signed of Sent (Percentage, 1 decimal). Share of contracts sent that the customer signed.

```
Signed of Sent =
DIVIDE ( [Contracts Signed], [Contracts Sent] )
```

Turn Time

Median Turn Time (Decimal, 1 place). Median business days from receipt to the credit decision. MEDIAN skips undecided applications because their value is blank.

```
Median Turn Time =
MEDIAN ( Applications[TurnTimeBusinessDays] )
```

Turn Time 75th Percentile (Decimal, 1 place). Three in four decisions are made within this many business days.

```
Turn Time 75th Percentile =
PERCENTILE.INC ( Applications[TurnTimeBusinessDays], 0.75 )
```

Decided Within 3 Days (Percentage, 1 decimal). Share of decisions made within three business days of receipt.

```
Decided Within 3 Days =
DIVIDE (
    CALCULATE ( [Decided Applications], Applications[TurnTimeBusinessDays] <= 3 ),
    [Decided Applications]
)
```

Median Decision Wait (Decimal, 1 place). Median business days from a complete file to the credit decision.

```
Median Decision Wait =  
MEDIAN ( Applications[DecisionWaitBusinessDays] )
```

Month-End Decision Wait (Decimal, 1 place). Median decision wait for files completed in the last three business days of a month.

```
Month-End Decision Wait =  
CALCULATE (  
    [Median Decision Wait],  
    Applications[File Complete Window] = "Last 3 business days"  
)
```

Rest of Month Decision Wait (Decimal, 1 place). Median decision wait for files completed on other days.

```
Rest of Month Decision Wait =  
CALCULATE (  
    [Median Decision Wait],  
    Applications[File Complete Window] = "Rest of month"  
)
```

Documents

Document Requests (Whole number). Count of documents requested from applicants.

```
Document Requests =  
COUNTROWS ( 'Document Requests' )
```

Applications With Requests (Whole number). Applications with at least one document request.

```
Applications With Requests =  
CALCULATE ( [Applications], Applications[DocumentRequests] > 0 )
```

Request Rate (Percentage, 1 decimal). Share of applications with at least one document request.

```
Request Rate =  
DIVIDE ( [Applications With Requests], [Applications] )
```

Requests per Application (Decimal, 1 place). Average document requests per application.

```
Requests per Application =  
DIVIDE ( [Document Requests], [Applications] )
```

Median Document Wait (Decimal, 1 place). Median business days from a request to receipt of the document. Outstanding requests are blank and skipped.

```
Median Document Wait =  
MEDIAN ( 'Document Requests'[WaitBusinessDays] )
```

Long Wait Share (Percentage, 1 decimal). Share of received documents that took more than five business days.

```

Long Wait Share =
DIVIDE (
    CALCULATE ( [Document Requests], 'Document Requests'[WaitBusinessDays] > 5 ),
    CALCULATE ( [Document Requests], 'Document Requests'[RequestStatus] = "Received" )
)

```

Outstanding Requests (Whole number). Requests never received or still pending.

```

Outstanding Requests =
CALCULATE ( [Document Requests], 'Document Requests'[RequestStatus] = "Outstanding" )

```

Formatting

Document Wait Bar Color (Text). Colors the longest wait orange. Apply with Bars > Color > fx > Field value, and copy the pattern for the reversal and turn time charts.

```

Document Wait Bar Color =
VAR mx =
    MAXX ( ALLSELECTED ( 'Equipment Categories'[EquipmentCategory] ), [Median Document Wait] )
RETURN
    IF ( [Median Document Wait] = mx, "#E07A3F", "#4B5BD6" )

```

Reversals

Approvals Reversed (Whole number). Approvals reversed before funding.

```

Approvals Reversed =
CALCULATE ( [Applications], Applications[Status] = "Reversed" )

```

Reversal Rate (Percentage, 1 decimal). Share of approvals that were later reversed.

```

Reversal Rate =
DIVIDE ( [Approvals Reversed], [Approved Applications] )

```

Team Reversal Rate (Percentage, 1 decimal). Reversal rate for the whole team, used as the constant line on the officer chart.

```

Team Reversal Rate =
CALCULATE ( [Reversal Rate], REMOVEFILTERS ( Officers ) )

```

Requested Amount Reversed (Currency, no decimals). Requested dollars on reversed approvals.

```

Requested Amount Reversed =
CALCULATE ( SUM ( Applications[RequestedAmount] ), Applications[Status] = "Reversed" )

```

Highest Reversal Officer (Text). Officer with the highest reversal rate among officers with at least 60 approvals.

```

Highest Reversal Officer =
VAR t =
    TOPN (
        1,
        FILTER ( ALL ( Officers[OfficerName] ), [Approved Applications] >= 60 ),
        [Reversal Rate]
    )
RETURN
    MAXX ( t, Officers[OfficerName] )

```

Comparisons

Same Level Average Decisions (Whole number). Average decisions per officer at the selected officer's level.

```
Same Level Average Decisions =  
VAR lvl = SELECTEDVALUE ( Officers[OfficerLevel] )  
RETURN  
    AVERAGEX ( FILTER ( ALL ( Officers ), Officers[OfficerLevel] = lvl ), [Decided Applications] )
```

Same Level Approval Rate (Percentage, 1 decimal). Approval rate for all officers at the same level.

```
Same Level Approval Rate =  
VAR lvl = SELECTEDVALUE ( Officers[OfficerLevel] )  
RETURN  
    CALCULATE ( [Approval Rate], REMOVEFILTERS ( Officers ), Officers[OfficerLevel] = lvl )
```

Same Level Reversal Rate (Percentage, 1 decimal). Reversal rate for all officers at the same level.

```
Same Level Reversal Rate =  
VAR lvl = SELECTEDVALUE ( Officers[OfficerLevel] )  
RETURN  
    CALCULATE ( [Reversal Rate], REMOVEFILTERS ( Officers ), Officers[OfficerLevel] = lvl )
```

Same Level Turn Time (Decimal, 1 place). Median turn time for all officers at the same level.

```
Same Level Turn Time =  
VAR lvl = SELECTEDVALUE ( Officers[OfficerLevel] )  
RETURN  
    CALCULATE ( [Median Turn Time], REMOVEFILTERS ( Officers ), Officers[OfficerLevel] = lvl )
```

Category Share (Percentage, 0 decimals). Share of an officer's decisions in each equipment category.

```
Category Share =  
DIVIDE (  
    [Decided Applications],  
    CALCULATE ( [Decided Applications], REMOVEFILTERS ( 'Equipment Categories' ) )  
)
```

Team Category Share (Percentage, 0 decimals). Category share for the whole team.

```
Team Category Share =  
DIVIDE (  
    CALCULATE ( [Decided Applications], REMOVEFILTERS ( Officers ) ),  
    CALCULATE ( [Decided Applications], REMOVEFILTERS ( Officers ), REMOVEFILTERS ( 'Equipment  
Categories' ) )  
)
```

Application Flow

Flow Count (Whole number). Value for each step of the funnel. Put 'Flow Stage'[Stage] on Category and this measure on Values.

```

Flow Count =
SWITCH (
    SELECTEDVALUE ( 'Flow Stage'[Stage] ),
    "Received", [Applications],
    "Decided", [Decided Applications],
    "Approved", [Approved Applications],
    "Contract sent", [Contracts Sent],
    "Contract signed", [Contracts Signed],
    "Funded", [Funded Applications]
)

```

Share of Prior Step (Percentage, 0 decimals). Conversion from the step before, shown in the funnel tooltip.

```

Share of Prior Step =
VAR cur = SELECTEDVALUE ( 'Flow Stage'[Sort] )
VAR prior =
    CALCULATE ( [Flow Count], REMOVEFILTERS ( 'Flow Stage' ), 'Flow Stage'[Sort] = cur - 1 )
RETURN
    IF ( cur > 1, DIVIDE ( [Flow Count], prior ) )

```

Findings

Finding Month End (Text). Sentence for the What stands out card. The other findings follow the same pattern.

```

Finding Month End =
"Files completed in the last three business days of a month waited a median of "
& FORMAT ( [Month-End Decision Wait], "0.0" )
& " business days for a decision, compared with "
& FORMAT ( [Rest of Month Decision Wait], "0.0" )
& " days the rest of the month."

```

7. Pages and visuals

1. Executive overview

Add four slicers and sync them to every page with View > Sync slicers: `Calendar[Date]` as a Between slicer, `Channels[Channel]`, and `'Equipment Categories'[EquipmentCategory]` as dropdowns.

Visual	Fields	Settings
Card (new), six cards	[Applications], [Approval Rate], [Median Turn Time], [Funding Conversion], [Funded Volume by Received Date], [Approvals Reversed]	Reference labels: [Funded Applications] under funded volume, [Reversal Rate] under reversals.
Clustered column chart	X: <code>Calendar[Month Start]</code> . Y: [Applications] and [Funded Applications]	Received in #A9B3EE, funded in #4B5BD6.
Bar chart	Y: <code>Channels[Channel]</code> . X: [Funding Conversion]. Tooltips: [Applications]	Data labels on. Sort by Channels[SortOrder].
Line chart	X: <code>Calendar[Month Start]</code> . Y: [Median Turn Time]	Markers on, 2 px line.
Bar chart	Y: <code>Applications[Status]</code> . X: [Applications]	Sort by the measure, descending.
Card (new) or text box	[Finding Month End] and similar finding measures	Optional. The HTML version writes four findings from the data.

2. Application flow

Visual	Fields	Settings
Funnel	Category: 'Flow Stage' [Stage] . Values: [Flow Count]. Tooltips: [Share of Prior Step]	Stage sorted by Sort.
Table	Channels[Channel] , [Applications], [Approval Rate], [Signed of Sent], [Funding Conversion], [Funded Volume by Received Date]	Data bars on Applications and Funding Conversion. Totals on.
Bar chart	Y: Applications[Exit Point] . X: [Applications]	Visual filter: Exit Point is not blank.
Line chart	X: Calendar[Month Start] . Y: [Funding Conversion]. Legend: Channels[Channel Comparison]	Independent broker in #E07A3F, all other channels in #4B5BD6.

3. Turn time

Visual	Fields	Settings
Card (new), five cards	[Median Turn Time], [Turn Time 75th Percentile], [Decided Within 3 Days], [Month-End Decision Wait], [Rest of Month Decision Wait]	
Column chart	X: Applications[Days Left Bucket] . Y: [Median Decision Wait]	Bucket sorted by Days Left Sort. Color the last three columns #E07A3F with a rule on Days Left Sort of 8 or more.
Line chart	X: Calendar[Month Start] . Y: [Median Turn Time] and [Median Decision Wait]	Both are business days on one axis.
Column chart	X: Applications[TurnTimeBusinessDays] binned (right-click > New group, bin size 1). Y: [Decided Applications]	
Bar chart	Y: Channels[Channel] . X: [Median Turn Time]	

4. Document requests

Visual	Fields	Settings
Card (new), five cards	[Request Rate], [Requests per Application], [Median Document Wait], [Long Wait Share], [Outstanding Requests]	
Bar chart	Y: 'Equipment Categories' [EquipmentCategory] . X: [Median Document Wait]	Bar color fx = [Document Wait Bar Color].
Bar chart	Y: 'Document Requests' [DocumentType] . X: [Document Requests]. Tooltips: [Median Document Wait]	Sort by count, descending.
Matrix	Rows: 'Document Requests' [DocumentType] . Columns: 'Equipment Categories' [EquipmentCategory] . Values: [Median Document Wait]	Background color gradient from #F1F3FC to #1C2366. Totals off.
Line chart	X: Calendar[Month Start] . Y: [Median Document Wait]. Legend: 'Equipment Categories' [Category Comparison]	Medical in #E07A3F.

5. Decisions and reversals

Visual	Fields	Settings
Card (new), five cards	[Decided Applications], [Approval Rate], [Approvals Reversed], [Reversal Rate], [Requested Amount Reversed]	
Bar chart	Y: <code>Officers[OfficerName]</code> . X: [Reversal Rate]. Tooltips: [Approved Applications]	Constant line fx = [Team Reversal Rate]. Highlight the largest bar with the color pattern from [Document Wait Bar Color].
Bar chart	Y: <code>Applications[ReversalReason]</code> . X: [Approvals Reversed]	Visual filter: ReversalReason is not blank.
Stacked column chart	X: <code>Calendar[Month Start]</code> . Y: [Approved Applications] and [Declined Applications]	
Line chart	X: <code>Calendar[Quarter]</code> . Y: [Reversal Rate]. Legend: <code>Officers[OfficerName]</code> grouped into the top officer and everyone else	Use right-click > New group on OfficerName, or show [Highest Reversal Officer] in the title.

6. Officer scorecards

Add a single-select dropdown slicer on `Officers[OfficerName]` for this page only.

Visual	Fields	Settings
Card (new), six cards	[Decided Applications], [Approval Rate], [Reversal Rate], [Median Turn Time], [Requests per Application], [Funded Volume by Received Date]	Reference labels: [Same Level Average Decisions], [Same Level Approval Rate], [Same Level Reversal Rate], [Same Level Turn Time].
Table	<code>Officers[OfficerName]</code> , <code>Officers[OfficerLevel]</code> , [Decided Applications], [Approval Rate], [Reversal Rate], [Median Turn Time], [Requests per Application], [Funded Volume by Received Date]	Edit interactions so this table is not filtered by the officer slicer. Data bars on Decided and Reversal Rate.
Line chart	X: <code>Calendar[Month Start]</code> . Y: [Decided Applications] and [Same Level Average Decisions]	Gray comparison line (#BAC0D8).
Clustered bar chart	Y: <code>'Equipment Categories'[EquipmentCategory]</code> . X: [Category Share] and [Team Category Share]	

7. Equipment categories

Visual	Fields	Settings
Table	<code>'Equipment Categories'[EquipmentCategory]</code> , [Applications], average of RequestedAmount, [Approval Rate], [Median Turn Time], [Median Document Wait], [Funding Conversion], [Funded Volume by Received Date]	Data bars on Median Document Wait.
Bar chart	Y: category. X: [Funded Volume by Received Date]	
Bar chart	Y: category. X: [Median Turn Time]. Tooltips: [Median Document Wait]	Highlight the largest bar.
Bar chart	Y: category. X: [Approval Rate]	

8. Check your numbers

With every slicer cleared, the report should show these values. They match the Reconciliation totals on the About sheet of the data workbook and the HTML dashboard.

Measure or visual	Expected value
Applications	5,973
Decided Applications	5,543
Approval Rate	72.4%
Median Turn Time	3.4
Funding Conversion	47.4%
Funded Volume	\$212,293,750
Funded Applications	2,832
Approvals Reversed	188
Reversal Rate	4.7%
Reversal Rate for Owen Pritchard	21.7%
Month-End Decision Wait	2.1
Rest of Month Decision Wait	0.4
Document Requests	9,625
Median Document Wait	1.8
Median Document Wait for Medical	4.8
Funding Conversion for Independent broker	24.8%

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