**Book of Work – Status Update**

|  |  |  |
| --- | --- | --- |
| **Task** | **Description** | **Status** |
| **Anaplan Report Base File Preparation** | Created and updated the Anaplan Consolidated report. | ✅ Completed (03-Mar) |
| **Anaplan Rate File** | Automated Python script to generate the Rate Card based on RTN + Country + GCB level. | ✅ Completed (03-Mar) |
| **Anaplan Report Sample Split File** | Created a sample file for submission to Vlima. | ✅ Completed (07-Mar) |
| **Anaplan Report Splits by L3 and Region** | Developed a macro for generating multiple split files by L3 and Region. The latest split was sent to Anshul & team. **(Macro is slow; Python implementation is advisable.)** | ✅ Completed (13-Mar) |
| **Billing File Update** | Updated and sent the Billing file as per the request. | ✅ Completed (17-Mar) |
| **Code Updates for New L2/L3 Changes** | Updated existing scripts to reflect changes in L2/L3 structures. | ✅ Completed |
| **Leavers Process** | Adjusted the process to align with new L2/L3 changes. | ✅ Completed (12-Mar) |
| **Transaction Listing** | Modified to reflect structural updates. | ✅ Completed (11-Mar) |
| **JML File** | Under review by Ritu/Himangi. | ⏳ In Progress |
| **GIRS Activity** | Developed a consolidated file with control checks. **Awaiting input files and SOP from Sandipan/Nachiketa.** (Discussed in person) | 🔄 Pending (30-Mar-2025) |
| **Cost Template** | Discussion held with Priyanka. Considering Saqib’s file as the base. **Chandra suggested pausing work as he has an alternative approach but needs time to finalize.** | ⏳ On Hold |
| **SOD Process Walkthrough** | Reviewed process with Rav Prasad. **No automation scope identified due to dependency on multiple tools (Atlas, GIAM, EIM). Manual intervention required.** | ❌ No Scope |

This **concise format** ensures clarity, highlights **pending actions**, and differentiates tasks that are **completed, in progress, on hold, or not feasible**.

Let me know if you want any refinements! 🚀

1.The demo fred provided showcased having capability to produce standard (ppt) packs – this could help BM team ( Sourach/Dhanu)

Answer: I couldn’t find any option for creating the ppt in trail version of alteryx. For sure this can be explored once I get the full license. Will updated you accordingly.

2. Can GSC Recharge process & CAMS process not be improved for M! & Gove team:

Sol: I don’t have any deep insights about CAMS process, need to understand the underlying requirements first.

3. Could BIRO team not benefit BIRO(EUC Reports and many TT/BC application has been built n Appian hence cab be out of scope.

-- help me framing answer to this, as I didn’t understand the question.

4. How do we prioritize and set improvements into tangible motion?

Sol: --help me understanding the question so that I can think of an appropriate answer.

explain what does the following mean:

getlast3months(curr\_month,curr\_year):

months=[]

for I in range(3):

month = (curr\_month – I – 1) %12+1

year = curr\_year if curr\_month -I >0 else curr\_year -1

months.append((month,year))

return months

ytd\_value = sum( row[f’M{month:02d} { curr\_year}’] for month in range (1, curr\_month+1)

if f’M{month:02d} { curr\_year}’ in sheet.columns

)

Period\_value = f”{month\_number\_to\_name(curr\_month)} –{str(curr\_year)[-2:0]}

where

Def month\_number\_to\_name(month):

Return[“Jan”,”Feb”,……..”Dec”][month-1]

1. So, there is one excel file which I have which have multiple sheets in it.
2. Data cleaning is required as Employee ID may have preceeding 0s, Resource name could be in upper /lower or mixed case, so I suggest keep them Capitalize each word.
3. Basically I have data received from multiple departments which I have consolidated and added to Conso Data sheet. People from different department may raise request to add the given psid/ Resource name to The system or may request to maintain the current status as is or to delete the said psid/ resource name from the system. Conso Sheet has the requests received from various departments with Status column (possible values : ADD,CUR, DEL).

This way it is possible that same PSID request with different status is requested from different departments, in that case we have to do a check and then finalize one decision .

Console data which has multiple columns PSID, Resource name, Email, Status, Tab data, GIRS Current Status, Tier 1, TTRL, PDMR, 8cs, 1, 2, 3, .1, 3.2, 4, 5, 6, 7 and 19, 8, 10.1, 10.2 and so on.This sheet can have duplicate records as same data rows might have been received from multiple departments.

The next sheet GIRS Extract (also known as insider list) has the current status as logged in our system. Based on these entries of Conso Data our motive is to check if these entries are already present in GIRS extract sheet or not. Moreover we have to check whther these entries are present in TIER1, TTRL, PDMR sheets or not. When we have to check use PSID col of Conso sheet and Employee ID col of GIRS, TIER,TTRL sheets where as PDMR is a small list of names, so we have to check with ‘Resource name’ column of Conso data from PDMR sheet col A values.

GIRS Sheet has some important cols that we will need Employee ID, Role column which can have three values only: Inactive Insider, Non-Core, Register Owner).

Conso Sheet is the requests received from various departments with Status column (possible values : ADD,CUR, DEL). A Non-Core user is one who is currently known as Active user.

So based on these we have to do the following :

* Identify Employees in the data received who are in tier 1, TTRL and PDMR list.
* Identify employees in the data received who are already in *Non-Core* status as per latest GIRS extract.
* Identify employees for whom there is an add request and they are not in the insider list as well as tier 1,ttrl,pdmr list(fresh additions).
* Identify employees for whom there is an ADD request as well as DEL request in different files along with file reference,(ADD request will override.)
* Identify employees with ADD request from the data received who is not part of tier 1,ttrl or pdmr list but is in *Inactive Insider* state in GIRS. (To be made *Non-Core*)
* Employee who is in in *Non-Core* status of GIRS but has received a deletion request is to be identified to be made *Inactive Insider*.
* Identify employees who are *Inactive Insider* in GIRS and also receive Delete request.

So we have to see if the new list of Conso data has any new entry which is not already presnt in our GIRS system, or not present in TIER1, TTRL or PDMR list.

These entries will be treated as New Additions.

* Identify employees for whom there is an ADD request in Conso data and they are not in the insider list (GIRS) as well as tier 1,ttrl,pdmr list(fresh additions). Should be saved in a new sheet names fresh additions.
* Identify employees for whom there is an add request as well as delete request in different files along with file reference,(add request will override.)

I have to prepare final sheet of employees who are new to the list i.e. they were not present in GIRS sheet,

1. I have one excel sheets There are multiple sheets. One is Conso Data. Second is GIRS Extract\_20 Mar’25 third is TIER1\_5 Mar’25,fourth is TRL\_3 Mar’25, and the last sheet is PDMR\_1Jan’25.
2. Now from the Conso Data sheet we have to do multiple lookups from other sheets, based on PSID col of Conso Data.
3. Conso Data sheet has columns PSID, Resource name, Email, Status, Tab data, GIRS Current Status, Tier 1, TTRL, PDMR and many more.
4. But first lookup PSID basis from the sheets :TIER1\_5 Mar’25, TRL\_3 Mar’25 with the column Employee ID present in each of these sheets.
5. From Conso Data basis Resource name column do a lookup if that name exists in sheet PDMR\_1Jan’25 if yes put yes in col I ‘PDMR’ of Conso Data.
6. Whether that PSID exists in that corresponding sheet or not, put yes or no in respective columns against each PSID.
7. Identify employees(PSID for whom there is an add request i.e. Col ‘Status’ has a value ‘ADD’ and they are not in the insider list i.e. GIRS Sheet (Employee ID) as well as tier 1 (Employee ID ),ttrl (Employee ID) but for pdmr sheet we have to check Resource name of those employees where ‘Status’ has ADD value check if these names are present in PDMR sheet. list(fresh additions).
8. Prepare a separate sheet for such employees with all details. Also add columns with title New\_ADD\_Request, GIRS\_Current Status,

Based on PSID of Conso Data check sheet GIRS Extract\_20 Mar’25 lookup the col ‘Role’ basis Employee ID of this sheet . if a PSID matches with Employee ID of GIRS Extract sheet then check if the col Role has value Non-Core, if yes place Non-Core

TIER1\_5 Mar’25

* Identify Employees in the data received who are in tier 1, TTRL and PDMR list.
* Identify employees in the data received who are already in *Non-Core* status as per latest GIRS extract.
* Identify employees for whom there is an add request and they are not in the insider list as well as tier 1,ttrl,pdmr list(fresh additions).
* Identify employees for whom there is an ADD request as well as DEL request in different files along with file reference,(ADD request will override.)
* Identify employees with ADD request from the data received who is not part of tier 1,ttrl or pdmr list but is in *Inactive Insider* state in GIRS. (To be made *Non-Core*)
* Employee who is in in *Non-Core* status of GIRS but has received a deletion request is to be identified to be made *Inactive Insider*.
* Identify employees who are *Inactive Insider* in GIRS and also receive Delete request.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Step** | **Process Name** | **Details** | **Key Points** | **Input Files** | **Comments** |
| **1** | **Data Cleaning & Standardization** | Remove leading zeros from **PSID/Employee ID** and capitalize **Resource Name**. Convert **PDMR** values to lowercase for matching consistency. | Standardize data formats for accuracy. | **Conso Data, GIRS Extract, TIER1, TTRL, PDMR** | Ensures uniformity for matching. |
| **2** | **Identifying Unique Requests & Conflicts** | Retain duplicate PSIDs to track different requests (**ADD/CUR/DEL**). If both ADD & DEL exist, **ADD** takes precedence. | Maintain all status requests for clarity. | **Conso Data** | Helps track conflicting updates. |
| **3** | **Cross-Checking Against Existing Data** | Match **PSID** with **GIRS Extract, TIER1, TTRL**. Match **Resource Name** with **PDMR**. Identify existing **Non-Core users** and handle DEL requests accordingly. | Ensure alignment with existing records. | **GIRS Extract, TIER1, TTRL, PDMR** | Cross-verifies employee records. |
| **4** | **Status Determination & Classification** | Categorize employees based on their presence in **TIER1, TTRL, PDMR** and their **GIRS Status**. Apply rules for **ADD/DEL** requests. | Clear rules for status updates. | **Conso Data, GIRS Extract, TIER1, TTRL, PDMR** | Ensures accurate classification. |
| **5** | **Data Segmentation & Report Generation** | Generate separate sheets for **New Requests, Updated Requests, Conflicting Requests, TIER1/TTRL/PDMR Employees, Deletion Requests**. | Organize data for better readability. | **Processed Data** | Helps stakeholders access relevant information easily. |
| **6** | **Output Finalized Data** | Create a consolidated dataset with **PSID, Resource Name, Email, Original Status (GIRS), Updated Status, Request Type (New/Updated), Comments**. Export as Excel. | Ensures structured output. | **Processed Data** | Final output for reporting. |
|  |  |  |  |  |  |

**Revised Plan for Processing GIRS Data**

**Step 1: Data Cleaning & Standardization**

* Remove leading zeros from **PSID/Employee ID**.
* Capitalize **Resource Name** for uniform formatting.
* Convert **PDMR** list values to lowercase for consistent matching.
* Ensure all datasets are loaded with appropriate data types and string formats.

**Step 2: Identifying Unique Requests & Handling Conflicts**

* Retain all duplicate PSID records in **Conso Data** to identify different requests (ADD/CUR/DEL).
* Consolidate multiple status requests for the same PSID:
  + If both **ADD** and **DEL** requests exist, ADD takes precedence.
  + If conflicting requests exist, record them in the **Comments** column.

**Step 3: Cross-Checking Against Existing Data**

* Verify whether the PSID exists in **GIRS Extract, TIER1, TTRL, and PDMR**.
* **Match PSID** with Employee ID in **GIRS Extract, TIER1, TTRL**.
* **Match Resource Name** with **PDMR list**.
* Identify existing **Non-Core users** and handle deletion requests accordingly.

**Step 4: Status Determination & Classification**

* Classify employees based on:
  + Their presence in **TIER1, TTRL, PDMR**.
  + Their existing status in **GIRS Extract**.
  + Their status change request in **Conso Data**.
* Conditions for updated status:
  + If an employee is in **Inactive Insider** and has an ADD request → Convert to **Non-Core**.
  + If an employee is in **Non-Core** and has a DEL request → Convert to **Inactive Insider**.
  + If an employee is **not found in any list** but has an ADD request → Mark as a **new addition**.

**Step 5: Data Segmentation & Final Report Generation**

* Create separate sheets for:
  1. **New Requests:** Employees added to the system.
  2. **Updated Requests:** Employees whose status has changed.
  3. **Conflicting Requests:** PSIDs with both ADD & DEL requests.
  4. **TIER1/TTRL/PDMR Employees:** Employees already in these lists.
  5. **Employees marked for Deletion.**
* Add a **Comments** column capturing the decision-making process.

**Step 6: Output Finalized Data**

* Generate a **consolidated dataset** containing:
  + **PSID, Resource Name, Email, Original Status (GIRS), Updated Status, Request Type (New/Updated), Comments**.
* Export final results in an Excel file with distinct sheets for better readability.

This structured approach ensures accurate processing, conflict resolution, and clear reporting for decision-makers.