**Book of Work – Status Update**

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| --- | --- | --- |
| **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.

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| --- | --- | --- | --- | --- | --- |
| **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.

I had a call over these points, now I have to send the problem specification doc , (what I understood, what I will be delivering code for) . Frame the following in such a way that instructions seem very clear. Be specifc to what I understood.

So they initially gave folloing pointers, and in todays call they just elaborated and gave a practical walkthrough of what those points are about. So I will write initial points along with what today I noted.

* **Point 1: Identify Employees in the data received who are in tier 1, TTRL and PDMR list.**

To identify the final list of people who are marked as insider. Inputs are received in 20+ (teams/depts) (26 to be specific for this time) odd files.

* 1. Sheet one will be having consolidated data from all these files.
  2. The consolidated sheet contains :

Column name – Actual value which it contains

PSID – Employee ID

Resource name – Insider Name,

Email -Employee Email

Status- Status requested by the team/dept (possible values : ADD,CUR,DEL),

Tab data- contains symbolic names of all teams/depts (26 unique values in current scenario)

GIRS Current Status – lookup from GIRS sheet (Employee ID) on PSID of Conso Sheet and fetch corresponding value of column “Role”

Tier1: lookup from TIER sheet (Employee ID) on PSID , if Employee ID Exists put Yes else No.

TTRL: lookup from TIER sheet (Employee ID) on PSID , if Employee ID Exists put Yes else No.

PDMR: lookup from PDMR sheet(col A) on Resource name, if found put Yes, else No.

Requested From : Semilcolon separated symbolic names of all teams/dept which have made request for a particular PSID.

Next 26 columns should be created with having names of those 26 unique symbolic values that we have in Tab data column. This col will store the requested status by each dept/team for a psid. Where no request is made for a psid by a team/dept put N/A. otherwise put the requested status in corresponding cell. Do it for all unique psids.

PSIDs can be duplicated as request for adding/ deleteing or maintaining the current status of a psid can come from multiple depts/teams.

We have to keep track of who all teams/depts have made requests for a particular psid. For that I want Tab data col to hold symbolic names of all dept/teams who have made request for each psid.

* + - 1. First create a df which shall have unique rows only from Conso Sheet.
      2. A PSID can be repeated Keep all columns. But update Tab data column.
      3. Look for
      4. Now update those 26 columns’ values and fetch the requested status.
      5. Highlight the records which are found in tier1, ttrl or pdmr. With color light red.
      6. Copy these records and create a separate sheet to store ‘already Present in Insider list’ . name the sheet accordingly.
      7. Check in GIRS, if these exist in GIRS and their column Role value is Non-Core add comment column to store value “Change to Inactive”.
      8. Store these records in separate tab as “Are Insiders : change to inactive”.

Following process should be done for remaining records which are not present in any of the insider list.

* Point 2. Identify employees in the data received who are already in *Non-Core* status as per latest GIRS extract.
* - update all 26 cols (tab data) with requested status.
* Thumb rule is : if a psid request has been made by multiple teams, check all requested statuses , look for ADD request among all requested statuses, check the GIRS Current status column, if its showing Non-Core.
* Copy all such records and paste in to a new sheet which will contain “already Active in GIRS” so no action is needed. Add comment col with value “PSID already is Active user in GIRS” also add description col with comment “which are teams which requested for Add, which are teams which requested Del and what are teams which requested CUR”. So that we can cross check .
* -
* Point 3: 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).
* Copy all such records and paste in to a new sheet which will contain “New entries to be added in GIRS” . Add comment col with value “new PSID found” also add description col with comment “which are teams which requested for Add, which are teams which requested Del and what are teams which requested CUR”. So that we can cross check .
* Point 4: 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.)
* Point 5: 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*)
* Copy all such records and paste in to a new sheet which will contain “PSID currently InActive in GIRS but now change to Non-Core” . Add comment col with value “PSID status change to Non-Core” also add description col with comment “which are teams which requested for Add, which are teams which requested Del and what are teams which requested CUR”. So that we can cross check .
* Point 6: 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*.
* If PSID has request only for DEL, then Copy all such records and paste in to a new sheet which will contain “Mark as Inactive in GIRS” . Add comment col with value “PSID to be marked as Inactive” also add description col with comment “which are teams which requested for Add, which are teams which requested Del and what are teams which requested CUR”. So that we can cross check .
* Point 7: Identify employees who are *Inactive Insider* in GIRS and also receive Delete request.

-Copy all such records and paste in to a new sheet which will contain “already InActive in GIRS” so no action is needed. Add comment col with value “PSID already is inActive state in GIRS” also add description col with comment “which are teams which requested for Add, which are teams which requested Del and what are teams which requested CUR”. So that we can cross check .

**Problem Specification Document**

**Understanding from Discussion**

The initial pointers provided were elaborated upon in today's call with a practical walkthrough. Below is the structured problem definition and approach for coding the solution.

**Point 1: Identify Employees Marked as Insiders**

To identify the final list of employees who qualify as insiders. Inputs are received in 26 different files from various teams/departments.

1. **Data Consolidation:**
   * A single sheet named **Consolidated\_Data** will store merged data from all input files.
   * This sheet will contain the following columns:
     + **PSID** (Employee ID)
     + **Resource Name** (Insider Name)
     + **Email** (Employee Email)
     + **Status** (ADD, CUR, DEL - based on request by team/department)
     + **Tab Data** (Symbolic names of all teams/depts making requests)
     + **GIRS Current Status** (Lookup from GIRS sheet for Employee ID to fetch “Role”)
     + **Tier1** (Lookup from **Tier\_Data** sheet; if Employee ID exists, mark "Yes", else "No")
     + **TTRL** (Lookup from **Tier\_Data** sheet; if Employee ID exists, mark "Yes", else "No")
     + **PDMR** (Lookup from **PDMR\_Data** sheet using Resource Name; if found, mark "Yes", else "No")
     + **Requested From** (Semicolon-separated symbolic names of all teams/departments requesting a change)
     + **26 Dynamic Columns** representing each team/department, containing the requested status per PSID (N/A if no request was made).
2. **Processing Steps:**
   * Create a dataframe with unique PSIDs.
   * Update **Tab Data** to store all departments requesting changes.
   * Populate the 26 columns with respective request statuses.
   * Highlight records present in **Tier1, TTRL, or PDMR** in light red.
   * Move highlighted records to **Insider\_List**.
   * Check **GIRS Current Status**:
     + If "Role" is "Non-Core", add comment **"Change to Inactive"**.
     + Move these records to **Change\_to\_Inactive**.

**Point 2: Identify Employees Already Marked as Non-Core in GIRS**

* Update the 26 department columns with the requested status.
* If an employee has an **ADD request** but is already in **Non-Core** status in GIRS:
  + Move to **Active\_in\_GIRS**.
  + Add comment: **"PSID already is Active user in GIRS"**.
  + Add description: List of teams requesting ADD, DEL, and CUR.

**Point 3: Identify New Additions**

* Identify employees who have an **ADD request** but are **not in the Insider List, Tier1, TTRL, or PDMR**.
* Move to **New\_Entries**.
* Add comment: **"New PSID found"**.
* Add description: List of teams requesting ADD, DEL, and CUR.

**Point 4: Identify Conflicting ADD & DEL Requests**

* Find employees with both **ADD and DEL requests** from different files.
* Store them in **Add\_vs\_Del\_Conflicts** with file reference.
* **ADD request overrides DEL**.

**Point 5: Identify Employees with ADD Request Who Are Inactive in GIRS**

* If an employee with an **ADD request** is not in **Tier1, TTRL, or PDMR** but is in **Inactive Insider** state in GIRS:
  + Move to **To\_NonCore**.
  + Add comment: **"PSID status change to Non-Core"**.
  + Add description: List of teams requesting ADD, DEL, and CUR.

**Point 6: Identify Employees in Non-Core Status Who Received a DEL Request**

* If a PSID only has a **DEL request**, move it to **Mark\_Inactive**.
* Add comment: **"PSID to be marked as Inactive"**.
* Add description: List of teams requesting ADD, DEL, and CUR.

**Point 7: Identify Employees Already Inactive in GIRS Who Received a DEL Request**

* Move such employees to **Already\_Inactive**.
* Add comment: **"PSID already is inActive state in GIRS"**.
* Add description: List of teams requesting ADD, DEL, and CUR.

**Final Notes:**

* All processing should ensure consistency and accuracy across departments.
* The code should handle duplicate PSIDs efficiently while tracking all requests.
* Each step should ensure clear categorization for easier review and decision-making.

| **Category** | **Details** |
| --- | --- |
| **Understanding from Discussion** | The initial pointers provided were elaborated upon in today's call with a practical walkthrough. Below is the structured problem definition and approach for coding the solution. |
| **Point 1: Identify Employees Marked as Insiders** | To identify the final list of employees who qualify as insiders. Inputs are received in 26 different files from various teams/departments. ... |
| **Data Consolidation** | A single sheet named **Consolidated\_Data** will store merged data from all input files. It will contain columns: **PSID, Resource Name, Email, Status, Tab Data, etc.** |
| **Processing Steps** | - Create a dataframe with unique PSIDs. - Update **Tab Data** to store all departments requesting changes. - Populate the 26 columns with respective request statuses. ... |
| **Point 2: Identify Employees Already Marked as Non-Core in GIRS** | Update the 26 department columns with the requested status. If an employee has an **ADD request** but is already in **Non-Core** status in GIRS, move to **Active\_in\_GIRS**. ... |
| **Point 3: Identify New Additions** | Identify employees who have an **ADD request** but are **not in the Insider List, Tier1, TTRL, or PDMR**. Move to **New\_Entries**. ... |
| **Point 4: Identify Conflicting ADD & DEL Requests** | Find employees with both **ADD and DEL requests** from different files. Store them in **Add\_vs\_Del\_Conflicts** with file reference. **ADD request overrides DEL**. |
| **Point 5: Identify Employees with ADD Request Who Are Inactive in GIRS** | If an employee with an **ADD request** is not in **Tier1, TTRL, or PDMR** but is in **Inactive Insider** state in GIRS, move to **To\_NonCore**. ... |
| **Point 6: Identify Employees in Non-Core Status Who Received a DEL Request** | If a PSID only has a **DEL request**, move it to **Mark\_Inactive**. ... |
| **Point 7: Identify Employees Already Inactive in GIRS Who Received a DEL Request** | Move such employees to **Already\_Inactive**. Add comment: **"PSID already is inActive state in GIRS"**. ... |
| **Final Notes** | All processing should ensure consistency and accuracy across departments. The code should handle duplicate PSIDs efficiently while tracking all requests. ... |