# Dashboard Automation Plan

## Objective

Automate the current manual dashboard process, including splitting the final output (~70 versions) and updating the pivot data source, using Python. The goal is to reduce time, improve consistency, and enable easy refreshes.

## Step 1: Data Source Preparation

We will create a base data file that mimics the manual data source, built from TM1 and actuals files.

* Files Involved:
* • TM1 Data: Primary data source
* • OPPL\_PV.xlsx and GRC2L\_PV.xlsx: Actuals files (to be received from PK)

## Step 2: Required Data Mapping

We will extract specific columns based on time periods and business needs:

GRC2L (Actuals):

|  |  |  |  |
| --- | --- | --- | --- |
| Column | Description | Example | Used As |
| YTD12 | YTD Prior FY (Dec of previous year) | Dec 2023 if FY = 2024 | Prior Year FY |
| YTD04 | YTD Prior Year till Date | Till April 2023 | Prior Year YTD |
| YTD04 | YTD Current Year YTD | Till April 2024 | YTD Actual |
| M04, M03, M02 | Last 3 Months | Apr, Mar, Feb | MoM Base |
| Derived | MoM = M04 - M03 | Apr - Mar | MoM |

OPPL\_PV (Targets):

|  |  |  |  |
| --- | --- | --- | --- |
| Column | Description | Example | Used As |
| YTD12 | Full-Year Target | Full FY 2024 | FY Target |
| YTD04 | YTD Target till current month | Sum Jan to Apr | YTD Target |
| (TBD) | Forecast values (Optional) |  | FY Forecast / YTD Forecast |

## Step 3: Month Selection Logic

User will input the current month (e.g., April), and we will:  
- Calculate previous two months  
- Convert all three months to MMM-YY format (e.g., Apr-25, Mar-25, Feb-25)

## Step 4: Output File Structure

Prepare a structured file matching the pivot’s expected format (data model), which will then be linked to the dashboard. This will include:  
- Function-wise splits  
- Groupings as per business need  
- Proper date formatting and labels

## Step 5: Automation Goals

* • Read and process TM1 + Actuals data
* • Derive required columns (YTDs, MoM, etc.)
* • Format as per pivot needs
* • Automate generation of 70+ splits
* • Output refreshed pivot-ready file

## Current Status

• Gathering source data (files from PK + TM1 headers)  
• Defining column mappings and transformation logic  
• Preparing data layout for pivot integration