**Executive Summary**  
Key automation deliverables completed, including GSC Recharges tool and Anaplan L3 splits. Enhancement requests (GSC-specific, structural changes) addressed. Next phase activities are on track.

**Key Achievements (Last Period)**

* Completed and shared GIRS Activity File; pending further input for closure. Part 1 of the process is completed, and the next phase will begin once additional input is received.
* Delivered Anaplan split reports by L3 and region; new request received to include region and country splits (including GSC sites).
* Explored Alteryx, created a workflow, and identified where it can be beneficial and where it may not be suitable for the project.

**Key Achievements (Last Period)**

* Developed and shared initial GSC Recharges tool (Phase 1) with SPOCs for billing input.
* Delivered Anaplan split reports based on L3 and region-levels.
* Updated tools/scripts to align with new L3/L4 structural changes.
* **GIRS Activity File:** First part completed and shared; awaiting new input for finalization. Second part will commence once first part is finalized.

**Key Achievements (Current Month)**

* Finalized GSC Recharges tool after enhancements; now under UAT.
* Addressed GSC-specific and structural change requests in tools.
* Initiated work on enhanced Anaplan splits for region and country (incl. GSC sites).
* Created Hiring Review Input File after performing validations and checks.

**Items for Management Attention**

* Stakeholders should ensure that all process details, including any guidelines or assumptions, are clearly documented in the SOP. This will help prevent any misunderstandings and provide a comprehensive framework for developing tools and writing code.
* Having clear and detailed instructions for every step will lead to faster execution, fewer delays, and more efficient tool generation, minimizing the risk of rework and ensuring accuracy.

**Key Risks and Issues**

* Limited visibility into process-specific details, leading to potential delays in tool generation and output due to insufficient SOP documentation.
* Risk of misalignment on assumptions or instructions that could delay timelines or affect accuracy during code development and tool implementation.
* Manual handling of certain inputs increases the possibility of errors or inconsistencies, which may impact the overall project progress.

**Additions**

* Detailed input guidelines and process steps to be incorporated into SOPs for a more structured workflow and smoother execution.
* Enhanced validation checks to be added to the tool development process to ensure data integrity and minimize errors.

**3. Key Achievements (Last Period – Mar 2025)**

* Finalized Anaplan L3-level report splits.
* Delivered initial version of Global Role report input structure.
* Delivered GSC Recharges SPOC input tool (UAT phase last month).
* Completed and shared GIRS Activity File – awaiting new inputs to finalize.
* Built exhaustive Alteryx workflow to evaluate automation opportunities.

**🔄 4. Key Activities (Current – Apr 2025)**

* Refined and updated Global Role report input tool based on evolving requirements.
* Delivered updated GSC Recharges tool with logging/control check enhancements.
* In-progress automation of Anaplan report splits by Region & Country incl. GSC sites.
* Scoped and initiated hiring review file generation tool with validations.

**5. Key Activities (Next Period – May 2025)**

* Start Phase 2 of GSC Recharges: review & validation of SPOC inputs. *(Target: 15-May-2025)*
* Complete automation of Hiring Review input tool using Appian & other validated sources. *(Target: 20-May-2025)*
* Continue refinement of Global Role reporting tools based on feedback loop.

**6. Items for Management Attention**

* Stakeholders are requested to clearly outline data requirements and processes upfront to avoid ambiguity in automation design.
* Shared SOPs must include detailed exceptions/edge cases to ensure smooth and accurate tool development.

**7. Key Risks and Issues**

* **Evolving requirements**: Ongoing changes may require further adjustments to automation processes.
* **Data integration delays**: New inputs and evolving requirements could cause integration delays.
* **Partial automation**: Since manual commentary and human judgment are involved, some parts cannot be fully automated yet.

**➕ 7. New Requests / Additions**

* Scoped hiring review file generation tool with validations – initiation planned for next week.
* Received request for Anaplan report splits by Region & Country for GSC sites (target: 25-Apr-2025).
* Global Role input structure continues to evolve based on iterative feedback and testing.

I'm developing a Python tool instead of a macro because macros are slow and require manual input for sensitivity labeling with every file, which is inefficient for processing 25+ files. Python allows for automation, faster execution, and eliminates the need for manual intervention, ensuring consistency and error reduction across all files.

Over the past period, I've been focusing on several key automation initiatives to improve our processes.

Over the last period, I’ve made substantial progress across multiple tool development areas with a clear focus on automation, efficiency, and reducing manual risks.

I initially completed the **Anaplan report** splits using a macro based on the L3-level logic. However, due to the large data volume and recurring sensitivity labeling prompts, the macro caused Excel to freeze frequently. To address this, I began transitioning the solution to Python for better stability and performance. The Python-based tool is already in progress and on track for completion by the end of this week.

Following a recent requirement, I’m now extending this Python solution further to handle region- and country-level splits. This enhancement is also underway and is expected to be completed by 25th April. I've retained and integrated parts of the original macro logic within the Python build to avoid duplication of effort and ensure continuity.

On the **GSC Recharges tool**, Phase 1 was completed and sent out for UAT. Post submission, I incorporated additional control checks and log generation features, which helped identify three minor exceptions. These are currently being addressed, and once resolved, the tool will be ready for rollout. Once fully in use, the GSC Recharges Tool is expected to save around 8 hours per month.

Additionally, I shared **the GIRS Activity File last** month. However, due to this being a quarterly activity and the SPOC Sandipan being engaged in BAU work, inputs are still awaited.

Within this period, I also built an **exhaustive Alteryx workflow** to assess its applicability on global role data. I successfully applied it on sample inputs and created a base output file. All the strengths and limitations of Alteryx in our context have been clearly documented to guide future use. ["I’ve completed my Alteryx training sessions. I've also been helping Prasanth identify potential use cases for Alteryx within our workflow, and he has successfully applied a basic Alteryx workflow to a simple Excel task. Additionally, Sahil has approached me for guidance in starting Alteryx, and I’m currently supporting him as he begins learning the tool.]

Looking ahead to the next period, one of the first tasks I’ll be taking up is the automation of **the Hiring Review input file generation**. This task involves collecting data from multiple systems like Appian and validating it before use. Although the manual effort is just a couple of hours, it’s highly error-prone and even missing a single role can have serious consequences. Hence, I plan to prioritize this task to make the process more robust and dependable.

Alongside, I will begin working **on Phase 2 of the GSC Recharges tool**, which will include enhanced logic to validate inputs received from SPOCs. Once implemented, it is expected to save around one full day of manual effort per month and standardize the process.

**The Transaction Listing tool,** aimed at eliminating dependency on Access by consolidating functionality into Excel and Python, was approximately 80% complete for HGMS, HGHQ, and HGSU. A new requirement has now been received to extend this solution to Hong Kong as well, which I will be taking up next.

Furthermore, I’ll continue to iterate on **the Anaplan Global Role** input preparation, based on ongoing feedback from Himanshu.

A few key **risks** . First, late-stage changes during UAT—as seen in the GSC tool—can affect timelines. Secondly, Excel's performance under heavy processing is a bottleneck, as witnessed with the Anaplan macro. The mandatory sensitivity labels further complicate automated processing. And lastly, data dependencies on SMEs, such as in the GIRS activity, may delay timelines due to their operational workload.

Overall, the tools developed and enhanced during this period are targeted toward long-term scalability, automation, and reducing risk from manual operations, while upcoming initiatives are focused on closing gaps in current processes and boosting efficiency across reporting and input validation workflows."

 **Right after your summary or before timeline-related discussion**, you can say:

“Just a quick note — since automation work is not routine like BAU, it requires time to design, test, and refine. So some timelines are a bit fluid, depending on the complexity and new scenarios we uncover while building.”

 **Or if someone questions a timeline**, you can respond:

“Yes, and that’s one of the challenges — unlike BAU tasks, development involves multiple iterations and validations, especially when integrating with sensitive systems or large data volumes. So it’s hard to pin an exact end date at times.”

I amtalking about a particular position id though there are numerous records.

So In gha\_refresh df the records with pos id : 14 is 1. In existing\_records df I have 4 records with pos id 14. In update\_exisiting ther are 3 records with this pos id. Now the prob is .

Update\_existing = existing\_record.drop(columns=cols)\

.merge(gha\_refresh, on = ‘pos id’, how =’left’)

Update\_exisiting = update\_Exisiting.drop\_duplicates()

I think its due to that drop duplicate

Def fetch\_spoc3(row):

If row[‘Category’===’New’ and pd.isna(row[‘SPOC’]):

Col = row[‘Entity Manager PS ID’]

If col in lookup\_dict3;

Row[‘SPOC’] = lookup\_dict3[col][‘SPOC’]

Return row

Where lookup\_dict3 contains psid and SPOC from another df.

**Executive Summary (May 2025)**

Significant progress has been made on automation-led initiatives. Phase 1 of the GSC Recharges tool has been finalized and is now live, following resolution of feedback points and successful testing. Phase 2 is underway with ~60% completion. Additionally, the Anaplan Report Splitter tool has been delivered, with training and handover completed; the tool is now in regular use.

**Key Achievements (Last Period – Apr 2025)**

* ✅ **Completed**: Phase 1 of the GSC Recharges tool – finalized, feedback incorporated, tested, and now live.
* ✅ **Delivered**: Automation tool for Anaplan report splits by Region & Country (incl. GSC sites); tool handed over with usage walkthrough.

**Key Activities (Next Period – May 2025)**

* **Complete Phase 2** of GSC Recharges, including SPOC input validation and final review. *(Target: 20-May-2025)*
* **Continue refinement** of Global Role reporting tools based on feedback loop.
* **Update Qlik Sense dashboard views** to accommodate latest structural changes.
* **Complete Transaction Listing tool** for HGMS, HGSU, and HGHQ.
* **Extend Transaction Listing tool** to include the Hong Kong unit.

**Management Attention**

**None**

**Key Risks and Issues (May 2025)**

* **Clarity & Timeliness of Inputs**: SOPs and requirement changes need to be clearly defined and communicated promptly. Any delays or ambiguities in inputs could lead to errors or additional rework in the automation process.
* **Partial Automation Limitations**: Despite progress, certain steps still require human intervention (e.g., comments, approvals), which could hinder complete automation and affect turnaround times.

Additions / New Requests

 Restructuring of Qlik Sense dashboards to reflect latest business structure (L3/L4) and enhance visibility.

 **Automation of Headcount Summary Dashboard:**  
Initiated automation of the Headcount Summary Dashboard to streamline reporting and reduce manual effort.