Wendy’s CA & INT Retainer Report

Section 1: Why? When? How?

Section 1.1: Objective (Why?)

The objective is to track all the Actuals and % Actuals allocated of Saatchi for the client Wendy’s. There will be two tabs one is for International, and the other one is for Canada, which will have their own Jobs and their respective Altair Actuals and % complete with respect to retainer. The report with 2 sheets is shared with Saatchi team for their consumption.

Section 1.2: Frequency (When?)

* Wendy’s CA & INT Retainer report – Twice a month
  + Mid-Month report – 15th
  + End of Month Report – 30th

Section 1.3: Consumers (Who?):

* **To:**
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Section 1.4: Process Flow (How?)

**Data Sources Used**

|  |  |  |
| --- | --- | --- |
| **Data** | **Source** | **Why?** |
| Roar Staffing Project Info | Altair-GDW | Contains all the project level data |

Link to the Logic shared by Nancy (Client): [Wendy's CA & INT Logic.docx](https://zendatashastra01.sharepoint.com/:w:/s/ssx_all/Ef5PuIPdMM9MhClfht8ttc8BNwX0G3jRFoYwlLHZ1ceUsQ?e=k7bzdz)

Section 1.4.1: Notes & Prerequisites

* Generate the report using previous version
* Use the formatting that is being used in previous version of the report
* While Copy Pasting data into the report make sure the data is sorted based upon **Job Number**

Section 1.4.2: Data Extraction

1. Open the *Roar Staffing Project Information* data from GDW (Web) and add Brand, Combined Status, Job ID -Fiscal Year & Roar Shopper – Gillette shopper panels columns.

(*Use Text field if available else use Key*)

1. Export the file for further processing.

Section 1.4.3: Data Processing & Transformation

Follow the steps available in the Logic file and get the Raw Data

Section 2: Scope for Improvement

* Since we are planning to integrate all three Wendy’s reports, the scope for improvement would be automatically generating all three or at least the overall summary report to the folder based on scheduled flow or trigger

Section 3: Historic Changes

* Wendy’s is a staffing-based business and all of them work from Wendy’s office in Cincinnati directly. Earlier we used to provide the Forecast Revenue, and the Total Estimate Allocated to the team. Since they would like to move forward with the Staffing-based retainer method, they like to see more of actuals rather than the estimate. Hence, we have replaced Altair Estimate with % Complete (Actual percentage with respect to retainer) and Total Estimate Allocated with % Actuals allocated.