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| **Business Requirements Document** |

The objective of this Business Requirements Document (BRD) is to establish clear communication between business process owners and Business Services Program Managers/ Application Services Project Managers while they jointly establish the capabilities needed to be delivered as part of the project. To this end, the requirements must be written so that both perspectives have a clear understanding of what is being proposed for delivery.

It will be used by the Business Analyst at the start of the project to determine effort required for delivering the capabilities, it will be used during design to ensure that all capabilities are included in the delivery, and it will be referenced by the test designers to ensure that all agreed capabilities are being delivered.

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| **Project Name: Numerator Demand Sensing Data Ingest Project**  **Business Unit: Strategic Insights**  **Program Manager: Stacy Anapol**  **Project Manager: Tyler Post** |

**Document Revision History**

This section lists revisions for this Systems Requirements Specification and descriptions of changes made.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Version** | **Section/Page** | **Update Description** | **Contact Name** |
| 4/15/2022 | 1.1 | All | Draft | Tyler Post |
| 4/15/2022 | 1.2 | All | Made edits to match the table names, corrected dictionary, sample data etc. | Sheetal |
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**Document Approval History**

The section provides a means of tracking the review and approval of this Systems Requirements Specification. This is also the list of who has authority to approve changes in the document.

| **Name** | **Project Role** | **Date** | **Responsibility** |
| --- | --- | --- | --- |
| McGinley, Marianne |  |  |  |
| Rice, Russell |  |  |  |
|  |  |  |  |
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# **Business Process flows (optional)**

This section captures existing diagrams in showing the current state and the proposed end-state of the business processes impacted by this project. (Embed diagram files directly here. Avoid adding Links to external locations)

|  |  |
| --- | --- |
| Title of Diagram | Diagram Files |
|  |  |
|  |  |
|  |  |

# **Requirement List**

List out each requirement of this project using the “Description” column - this describes the information, actions, or process that the business needs information systems to support.

Use the “Outline Number” column to show relationships between the sub-level-requirements.

Use the “Scope” Column to determine what is IN or OUT of scope

Identify who is responsible for the requirement using the “Owner” column, this is person you go to for an answer or who is ultimately responsible. Should only be one person. Examples: Business Process Owners (BPO), Key Business Users etc.

Assess the priority in the “Priority” column using the following terms:

• M - **Must-Have**: Describes a requirement that must be satisfied in the final solution for the solution to be considered a success.

• N - **Nice-to-Have:** Describes a requirement which is considered desirable but not necessary. This will be included if time and resources permit.

## **General Overview**

Numerator provides market share data by brand and retailer for a large assortment of product categories. The data is collected by panel opt-in using a consumer-facing app.

Numerator data is currently being used for several different applications across GTS and SI:

* SI Market Demand Sensing Model
* GTS SI Market Share Quarterly Report
* MPM Dashboard
* Market Share Rolling 12 Dashboard

## **Current Existing Process**

*Standard Numerator Reports*

The Advanced Trended Metrics Scorecard (ATMSC) in the Numerator UI is currently used to pull reports for multiple categories, retailers, and time periods at one time. The Demand Sensing team uses custom category groups created in conjunction with Marianne M’s team to pull data according to the necessary parameters and feeds the data from excel files into the model. The 16 reports along with the MPM report in scope are as below (These reports are currently ingested in Snowflake under ‘Numerator schema as Phase 1)–

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| |  | | --- | | 1. Hand\_Tools and OPE\_SBD\_Market\_Share\_Quarterly | | 1. Power\_Tools\_and\_PTA\_SBD\_Market\_Share\_Quarterly | | 1. Shopper\_Metric\_Hand\_Tools and OPE | | 1. Shopper\_Metric\_Power\_Tools\_and\_PTA | | 1. DF1\_Region\_split\_on\_Subcategory\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Granular 2. DF2\_Region\_split\_on\_Subcategory\_level\_of\_Hand\_ToolsStorageOutdoors 3. DF1\_Retailer\_split\_on\_Subcategory\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Drills\_Saws 4. DF2\_Retailer\_split\_on\_Subcategory\_level\_of\_HTASHTStorageOutdoors 5. DF1\_Region\_split\_on\_Category\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Drills\_Saws 6. DF2\_Region\_split\_on\_Category\_level\_of\_HTASHand\_ToolsStorageOutdoors 7. DF1\_Retailer\_split\_on\_category\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Drills\_Saws 8. DF2\_Retailer\_split\_on\_Category\_level\_of\_HTASHTStorageOutdoors 9. DF1\_Region\_split\_on\_overall\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Drills\_Saws 10. DF2\_Region\_split\_on\_overall\_of\_HTASHand\_ToolsStorageOutdoors 11. DF1\_Retailer\_split\_on\_overall\_of\_Power\_Tools\_\_PTA\_Combined\_PTA\_SBU\_CG\_Drills\_Saws 12. DF2\_Retailer\_split\_on\_overall\_of\_HTASHTStorageOutdoors 13. MPM Extract | |
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## **BUSINESS REQUIREMENT**

The business requirement is to ingest the relevant data available through \*ATMSC UI (that gets downloaded from UI and uploaded into sftp folder location on a monthly/quarterly basis) into Numerator database within Caspian/Snowflake on a monthly and quarterly basis.

The scope of the Phase 1 of this request is to work with the downloaded 17 reports (listed above) from the ATMSC UI. Including the reports sample below – in a zip file; Please note that – the reports in actual may come as individual files (unzipped) within sftp folder.

The custom category groups for all these 6 reports i.e the 3rd column name on each of this report is either “SBD Quarterly Scorecard Stores” or “Retailer” in the files; This column name for all the 6 reports for all the corresponding tables in Caspian, need to be referred as (normalized as) “Retailer”. Will add more details in data dictionary section (Appendix A).

* Quarterly\_Brand\_Share
* HTAS\_Brand\_Share
* Outdoor\_Brand\_Share
* Power\_Tools\_Brand\_Share
* Total\_Tools\_Outdoors\_no\_Lighting\_Brand\_Share
* Rolling\_Twelve

Sample Reports (Raw Format) in zip file





\*The agreement with the vendor has recently been augmented to enable access to a new “Portfolio Insights” user interface (ATMSC) with extended capabilities and parameters not available in the standard UI.

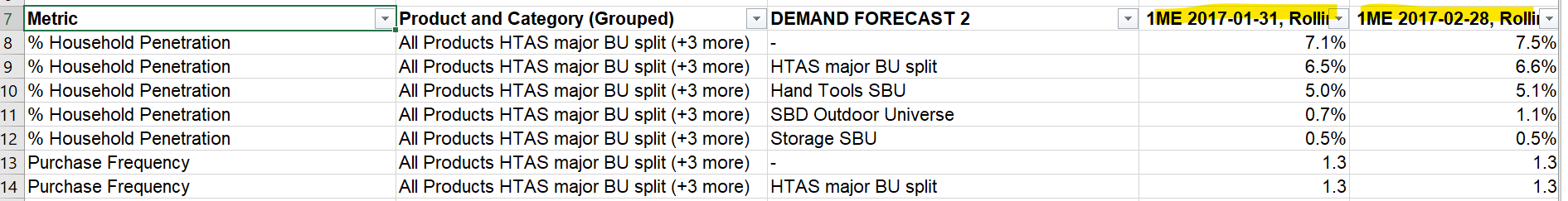
## Proposed Solution – Phase 1 (Market Demand Sensing Model)

A member of Russel Rice’s team will export the necessary 6 reports (listed in “Business requirement section”) from the Numerator ATMSC UI and drop them into an SFTP folder [to be established during ingestion by dev team] on a Monthly and Quarterly basis (depending on nature of report).

The 6 reports from the sftp folder will need to be ingested in corresponding 16 tables in Caspian, Snowflake under **Numerator** schema. The reports come in **excel** file format, in single tab.

Please note that at the time of ingestion, the custom category groups come in as part of the 3rd column of all reports with column names as “SBD Quarterly Scorecard Stores” or “Retailer”; For ingestion these specific column name should be ingested as “Retailer” in each of their tables.

Also, the reports currently have one column added for most recent Monthly or Quarterly data) which would mean the data structure not staying consistent with every acquisition – Example listed below – where each time period (e.g. 1ME, 2017-01-31, Rolling) is part of 1 column, (1ME, 2017-02-28, Rolling) is in next column of a monthly report. To avoid this, we are proposing to transpose the data and capture all the values pertaining to time period as part of 3 fields time\_scale, time\_period, time\_coverage within the data dictionary; IN this same example - time-scale would be 1ME(Month end), time-period would be 2017-01-31 and time\_coverage would be Rolling in this example).



Sample expected output for one of the tables is embedded below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Position** | **Fieldname** | **PK** | **Data Type** | |
| 1 | Metric | X | String |  |
| 2 | Product and Category(grouped) |  | String |  |
| 3 | Retailer | X | String |  |
| 4 | Brand |  | String |  |
| 5 | time\_scale |  | String |  |
| 6 | time\_period | X | Date |  |
| 7 | time\_coverage | X | String |  |
| 8 | Value |  | Float |  |



The data dictionary can be found in Appendix A.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Outline Number | Scope | Description | Owner | Priority |
| BR 1.0 | IN | **High Level Data Requirements – Functional:** At high level, we need to acquire, ingest, transpose, Numerator data for 6 tables – **Under the Schema named “numerator” and create the following tables**   1. HTAS\_Brand\_Share 2. Outdoor\_Brand\_Share 3. Power\_Tools\_Brand\_Share 4. Total\_Tools\_Outdoors\_no\_Lighting\_Brand\_Share 5. Quarterly\_Brand\_Share 6. Rolling\_Twelve   Data Dictionary Format for the tables are included in Appendix A. | SI | M |
| BR 1.1 | IN | **History Requirements & Frequency:** 2017-Current   * **(One-time historical, delta quarterly loads)**   + Quarterly\_Brand\_Share * **(One-time historical, delta monthly loads)**   + HTAS\_Brand\_Share   + Outdoor\_Brand\_Share   + Power\_Tools\_Brand\_Share   + Total\_Tools\_Outdoors\_no\_Lighting\_Brand\_Share   + Rolling\_Twelve   **Frequency:** Data needs to get updated monthly or quarterly, as indicated using the primary keys listed in the data dictionary. | SI | M |
| BR 1.2 | IN | Acquisition – The files will be acquired from sftp folder once a month or once a quarter within the “numerator” folder – that needs to get created. | SI | M |

# **Assumptions / Dependencies / Constraints (optional)**

Assuming Russel or an identified person will drop the files into sftp folder location on an ongoing basis. Will need to work with a designated date/time every month/quarter for dropping and ingesting the data extracts.

# **User Groups (optional)**

In this section, describe the Users (people, organizations, or other entities) that participate in the execution of business processes that interact with the business and/or interact with the new product of application.

|  |  |
| --- | --- |
| User Group Name | Description |
| NA | Not Applicable |

The facet map describes the background info of the User groups that interact with the new product or application.

|  |  |  |  |
| --- | --- | --- | --- |
| Facets | User Group 1 | User Group 2 | User Group 3 |
| Location: |  |  |  |
| Primary Language: |  |  |  |
| Functions:  (what the user will do with the system) |  |  |  |
| Population:  (how many Users at the location) |  |  |  |

**\*\*Detail Functional requirement must be captured in Functional Requirements/SRS document.**

**\*\*Infrastructure requirements need to be documented in Infrastructure Requirements document template. A/S PM should work with I/S PM to document the requirements prior to ISR submission and envision phase gate review.**

APPENDIX A – Data Dictionary

**See embedded Excel file below for data dictionaries for all tables**

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