PPT Automation – New Setup

1. Note that not all projects are suitable for automation, and there will need to be some degree of repetitiveness (multiple waves, multiple countries, multiple segments etc) for it to be suitable.

2. For any ad hoc report templates, automation team to review and determine the suitability for automation.

3. Materials must be ready to enable setup.
   - Formatted **final report template** with charting instructions. Automation team will not manually reformat the master template but will **only update the data/ score and conditional formatting**.
   - **Data file**
     i. Data tables - to be consistent across countries/segments/waves in terms of the following:
        a. Table structure
        b. Table description labels
        c. Question labels
        d. Attribute/ brand labels
        e. Formatting of values. For instance, 50% and 50 are 2 different values.
   f. Example:

     ii. Respondent-level data (raw data) - to be consistent across countries/ segments/ waves in terms of the following:
   a. Question labels
        b. Answer labels
        c. Formatting of values

4. Please provide detailed charting instructions in the report template, for example:
   - Banner to use (if you have more than one).
   - Table to use for each chart/visual object (especially if you have multiple breaks or filtering, we want to be sure we pick the right table).
   - Ranking order, if required.
   - SigTest requirement.
   - Special calculation (anything that is not the standard mean, proportion, median).
   - Conditional formatting based on scores, etc.
   - General rules, such as sample size annotation, client brand color and position, 'do not display if scores below 4%', etc.
   - Example of charting instruction in a slide.
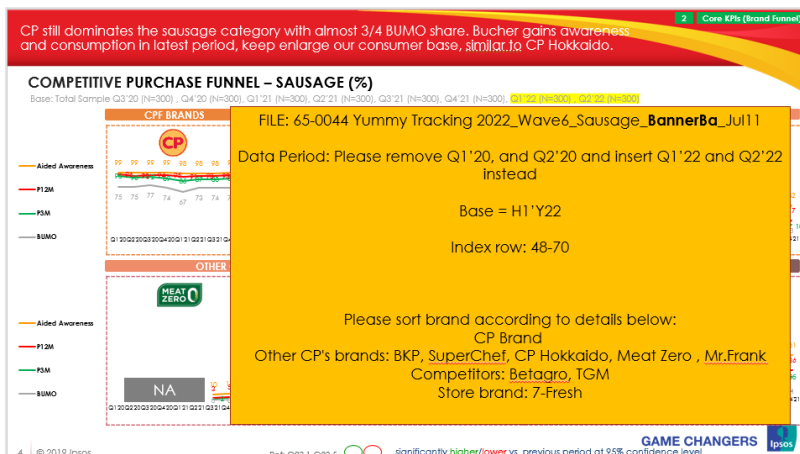
5. Please note that all PPT editable charts, tables and text boxes are automation friendly. OLE objects (embed) are not able to be automated.

6. Please note that automation team do not automate shapes, such as
   - Images positioning for brand logo (dynamic position). For fixed position, automating shapes is possible given that all icon size/ image dimension have to be identical.
   - Circle/rectangle shape to highlight result.
   - For sigtest, you may consider displaying the arrow in symbol format.
   - Example of shapes/ icons.
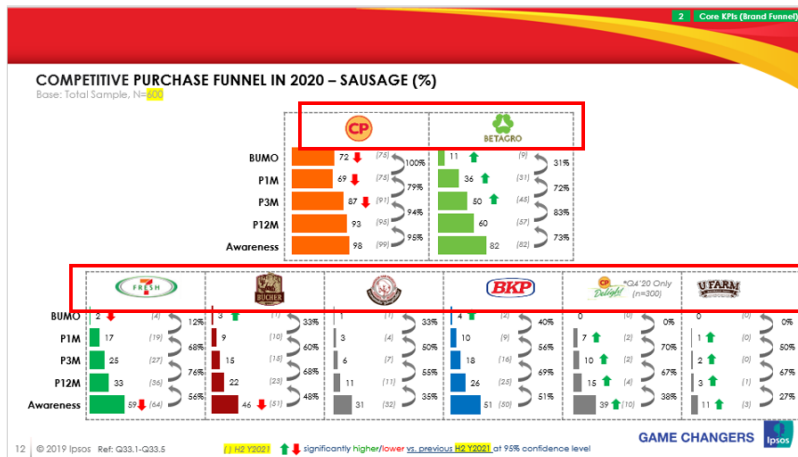
7. A new setup usually **takes 2-3 weeks** upon receiving the materials (refer to point 3).

8. Please send us the FINAL data **at least 2 or 3 days** before the automated report is due to you. Do check with automation team the feasibility of timeline before committing it to the client.

9. Any re-run of reports due to revised tables/ data need to check with the team to agree on the timeline

10. Any deviation of timeline or delay in providing material or data, could impact the delivery of automated output. If such situation arises, kindly discuss with the team to assess how best we can assist you in meeting your deadline.

11. Once all automated reports are delivered, we appreciate your timely acknowledgement so that we can close the job and release the time for other teams. If no feedback received within 7 days, we will consider the job is completed and any change request will be considered new.

12. We reserve the right to push back report delivery date if:
    - There are any changes to the report template in this time period.
    - Charting instructions are unclear.
    - The data tables are inconsistent.
    - There are any delays in receiving any of the required materials as per the above mentioned.

PPT Automation – Existing Setup

1. Please note that existing automation refers to projects that automation team has previously automated with < 10% changes. Anything more than that will have to be considered a new automation and you will need to submit a request for new automation instead.

2. At least **2 weeks** is required upon receipt of final template with **instructions highlighting the changes** and interim data reflecting the changes for automation team to modify the automation. This can be skipped if there are no changes required.

3. Please send the necessary material, e.g. master template, and data files that reflect the changes (if any).

4. We will need to receive the final data from you at least 1 or 3 days before the delivery date.

5. We reserve the right to push back report delivery date if:

   - The data tables are inconsistent.
   - There are any delays in receiving any of the required materials as per the above mentioned.