Digital Human Resource Admin

Readme

Version 1.0

22/08/2019

Table of Contents

1. Introduction

This document contains all essential information for the user to make full use of the Digital worker. This manual includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Digital Worker.
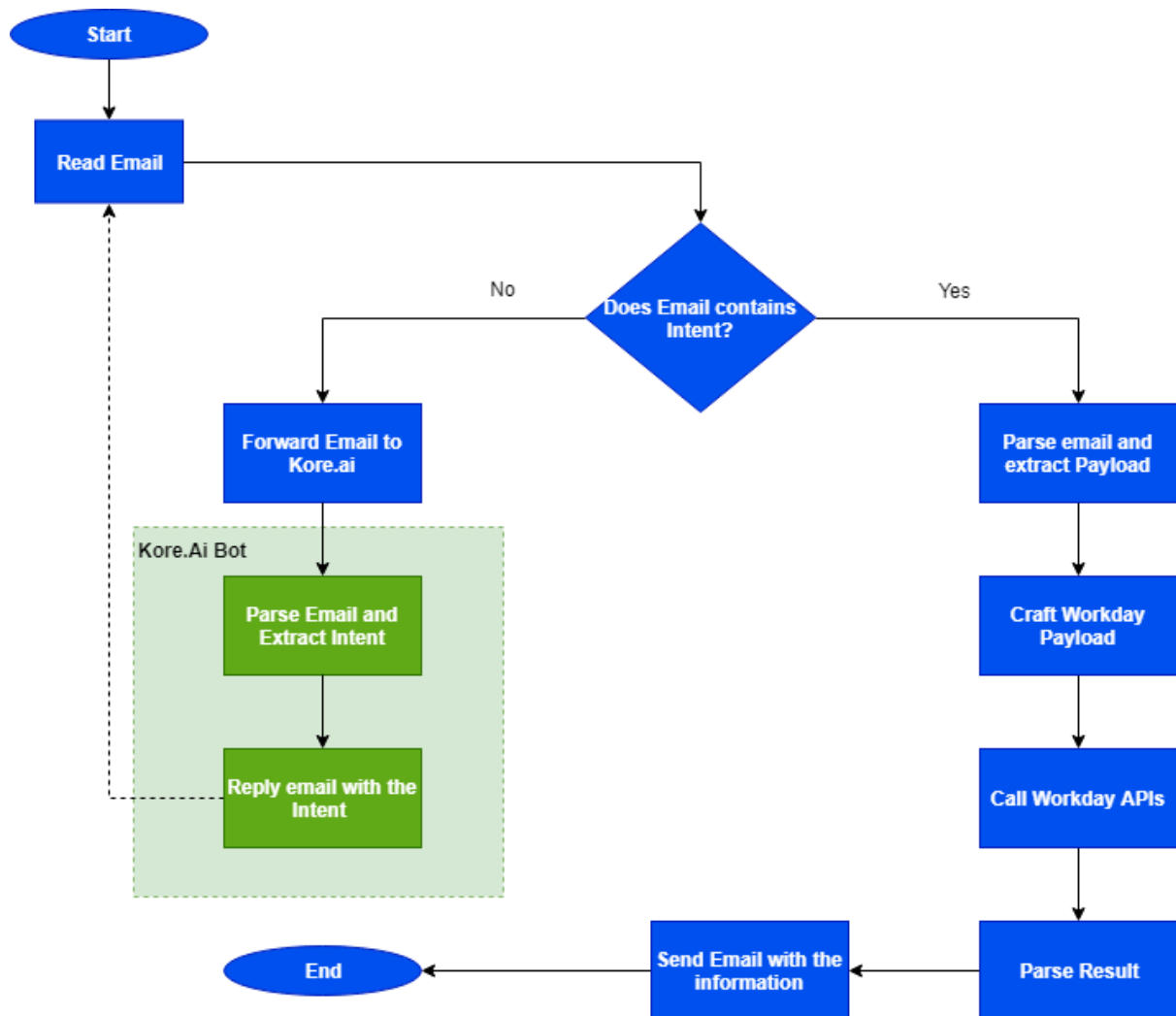
Overview

Digital Human Resources Admin aids a Human Resource professional to automate basic HR operations. This digital worker automates the following five tasks:

1) Search for contact information of an employee
2) Get the next pay date for an employee
3) Get the leave balances of an employee
4) Apply for leave
5) Initiate the appraisal process of an employee

The Digital Worker uses Natural Language Processing to understand user's request and performs accordingly. User interfaces with the worker via sending an email. The digital worker parses the email, employs Kore.Ai to understand the intent of the user, extracts information/performs process on Workday. It then replies to the user on Email.

- **Visual Flow –**

Start

Read Email

Does Email contains Intent?

No → Forward Email to Kore.ai

Yes → Parse email and extract Payload

Kore.Ai Bot
- Parse Email and Extract Intent
- Reply email with the Intent

Craft Workday Payload

Call Workday APIs

Parse Result

Send Email with the information
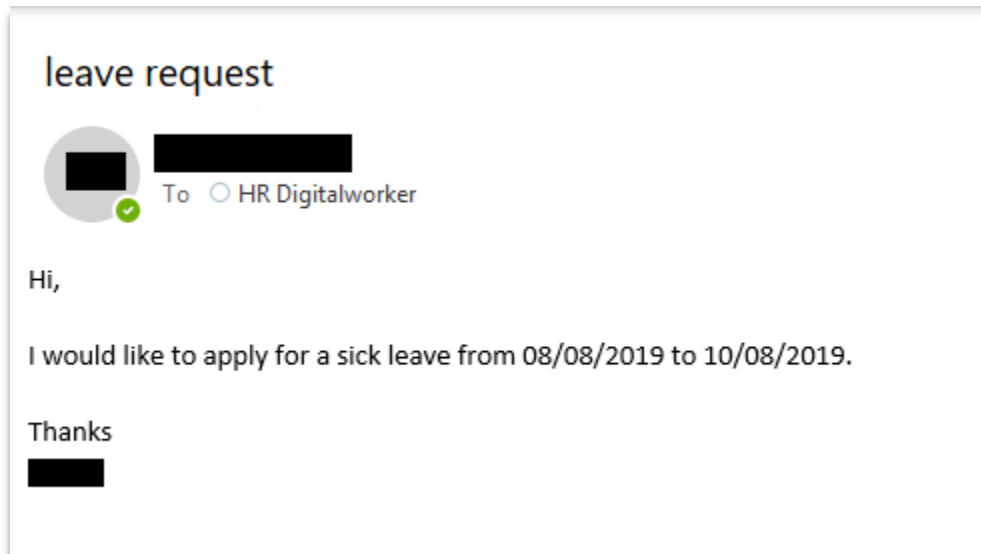
End

- **Input and Output Example –**
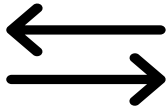
- **Input: Typical Email from Employee for raising Leave Request:**

leave request

To ○ HR Digitalworker

Hi,

I would like to apply for a sick leave from 08/08/2019 to 10/08/2019.

Thanks

- **Output: Reply from the Digital Worker:**

Leave Request for -

HD   HR Digitalworker
To ✓

Hi,

Your leave request has been raised.
Email notification has been sent to the manager

Thanks
HR Digital Worker

[Automated email, please donot respond]
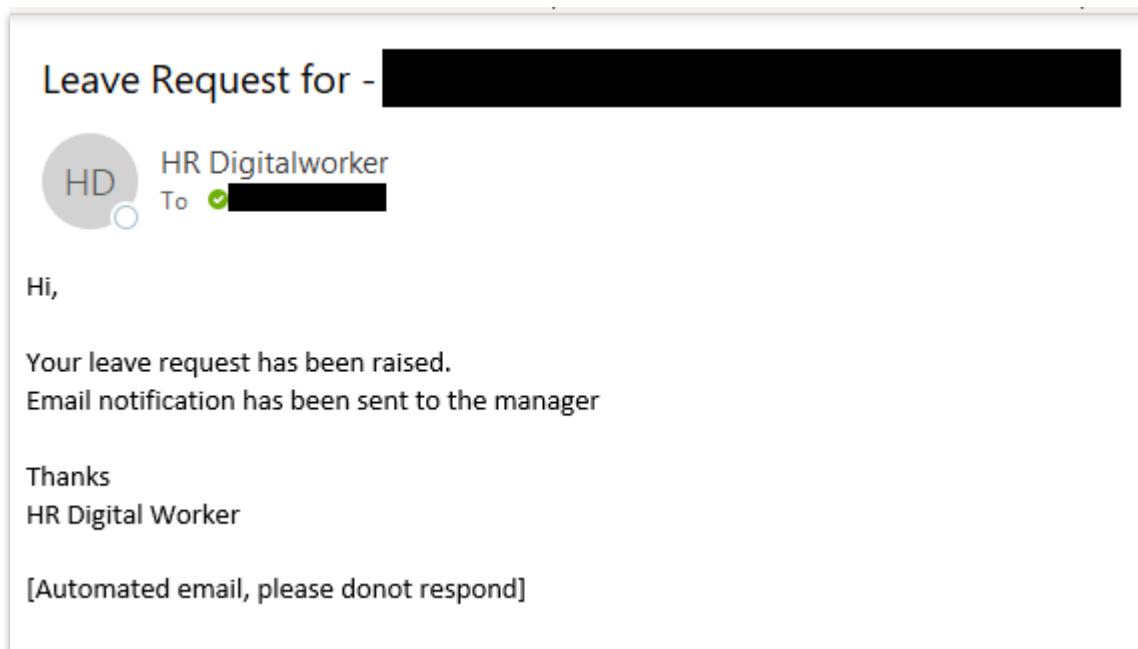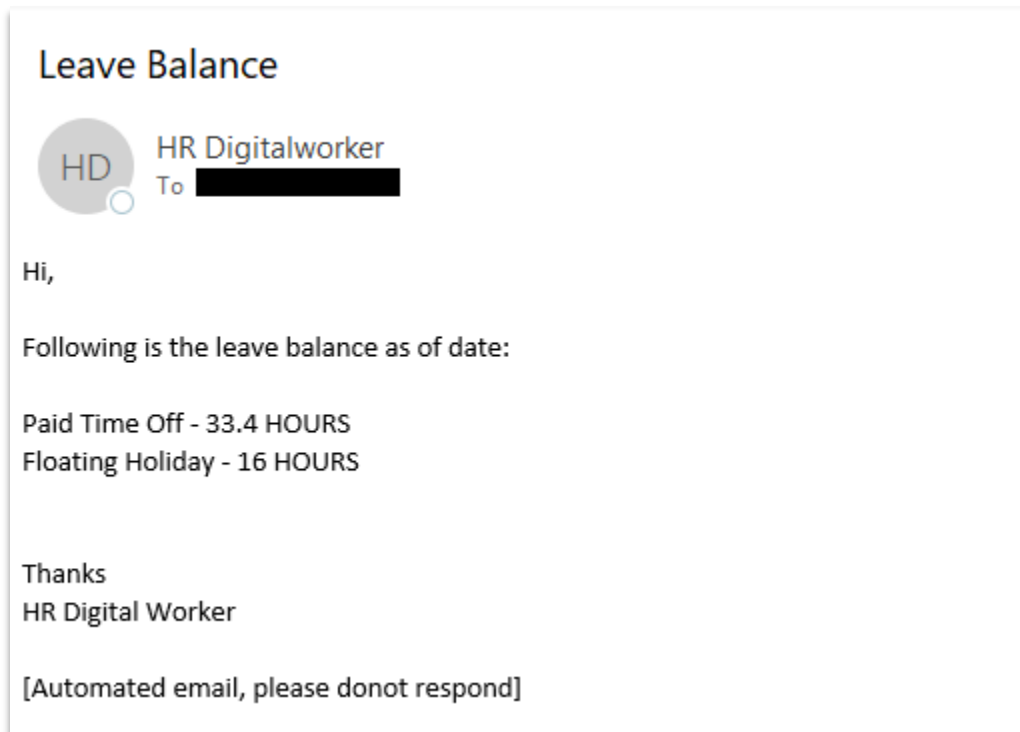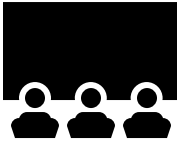
- **Input: Typical Email from Employee to Get Leave Balance:**
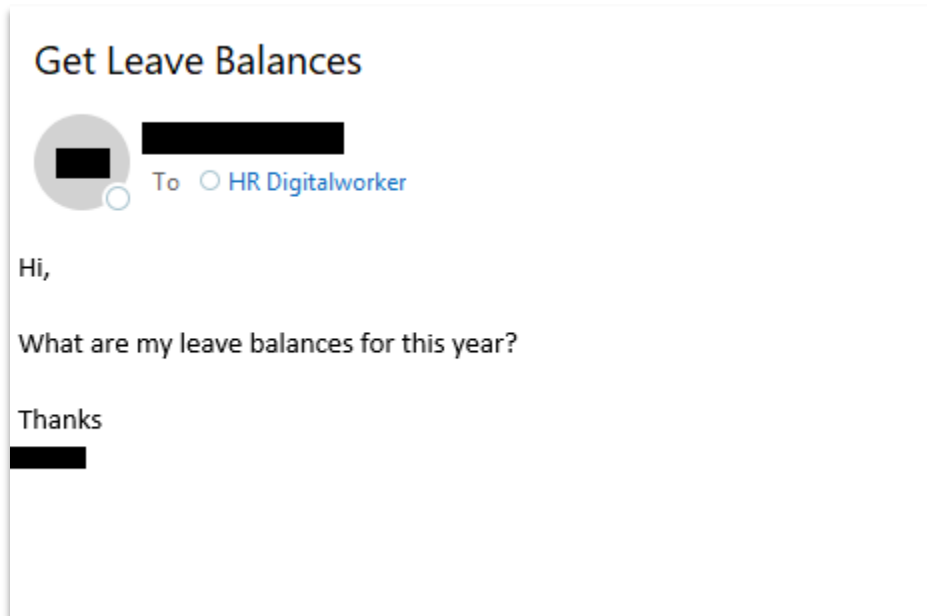
- **Output: Reply from the Digital Worker:**

Common Use cases

A common use case, as shown above, is to assist Human Resource admin to answer emails from employees.

Other use cases may include:

- Answer user queries on an Information Kiosk

- Backend for an Employee Self-Service Portal

2. Requirements & Prerequisites

System Requirements

For the PC or server where the bot needs to run:

✓ RAM: 8GB or higher

✓ PROCESSOR: Intel Core i5 or higher and equivalent for any other OS

✓ Hard Disk: Up to 2GB of overall free space in the AA Client installation drive.

Reference below for Enterprise Client & Control Room system requirements.

Prerequisites

- **Software's needed -**

✓ Workday version 33.x

✓ Kore.Ai

✓ AA Enterprise Client 11.x

✓ AA Enterprise Control Room 11.x

- **Accounts/License needed –**

✓ HR Email Inbox – To receive/send emails

✓ Trained Kore.Ai Bot - To parse emails

✓ Workday Integration Access

✓ AA Enterprise License

Security Measures

There are some security best practice recommendations that you may follow with your DW.

- It is not recommended to provide admin access to the Windows User Account executing the Bots, to avoid unintended access to system files

- It is recommended to change the Workday account credentials twice or more in a Quarter to ensure data safety

- It is recommended to change the passwords for the HR Email account twice or more in a Quarter to ensure data safety

3. Getting Started

Skill Matrix
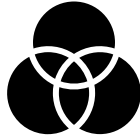
The functionality of the Digital Worker has been divided into a set of skills.

Below is an overview of how the task bots and metabots map to these skills:

Skill	Task Files	MetaBot Files
Create DW folder structure, if not already present	01 – Create Folder Structure.atmx	No Metabots
Forward email to Kore.Ai, if the email is from user else pass it to next bot for processing	02-Email Routing.atmx	No Metabots
Parse incoming email from Kore.Ai	03 – Extract Payload from Email	No Metabot
Identify user's intent and call specific operations on the Workday Mbot	04-Process Intent.atmx	WorkdayAPI.mbot

Skill	Metabot Files
Connect with Workday and perform HR operations	WorkdayAPI.mbot

Installation Hierarchy

Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

Folder Structure on your Machine

Folder Structure	Description

<AA Application Path>
 	
1. My Tasks
 	
   1.1. Bot Store
 	
      1.1.1. Digital Human Resources Admin
 	
         • **Error Folder**
            ○ **Logs**
               - Error logs Month-Day-Year Hour Min Sec.txt
 	
            ○ **Snapshots**
               - Error Snap Month-Day-Year.png
 	
         • **Input Folder**
            ○ HRWorkerConfiguration.txt
 	
         • **My Tasks**
            ○ 00 - Digital HR Worker - Master.atmx
            ○ 01 - Create Folder Structure.atmx
            ○ 02 - Email Routing.atmx
            ○ 03 - Extract Payload from Email.atmx
            ○ 04 - Process Intent in Workday.atmx
	<AA Application Path> is the location where AA files are stored on your machine
	
	1. My Tasks
	
	My Task Folder is the default directory where Bot Files are saved.
	
	1.1 Bot Store
	Bot Store Folder contains the Bot Name Folder which the installer creates while installation of the Bot.
	1.1.1 Digital Human Resources Admin
	This folder gets created by the installer and contains files and folders needed for the bot execution.
	• **Error folder** is where logs and snapshots of screens will be placed if something goes wrong with the bot during execution
	
	• **Input Folder** is where the input files that the bot needs for execution of the use case is saved
	   ○ **HRWorkerConfiguration.txt** is where the values need to be setup for the DW to run.
	
	• **My Tasks** folder contains all the Developed Platform Source Code

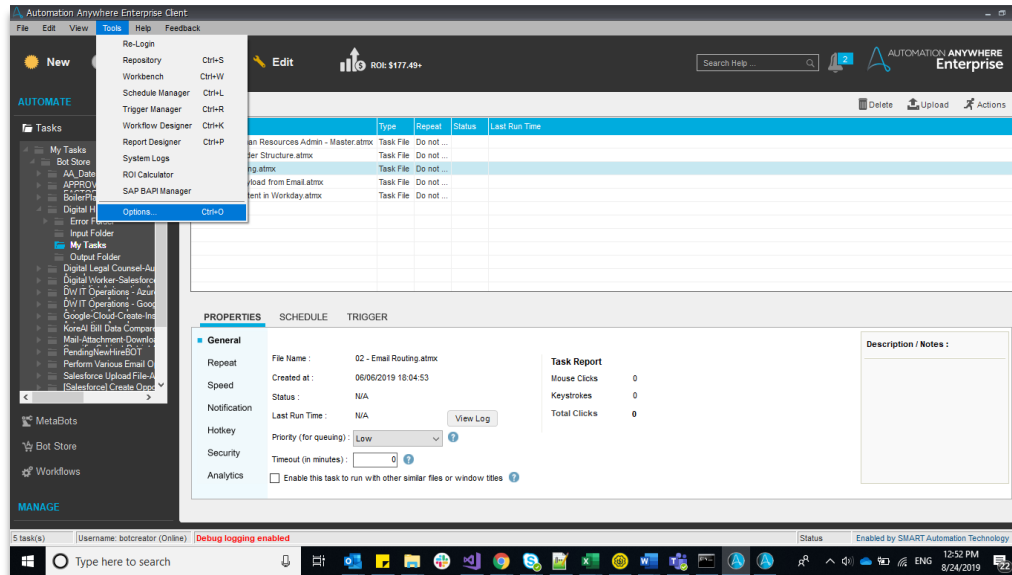|	2. **My MetaBots** folder contains the Developed Metabots needed for the bot execution.
2. **My MetaBots** • WorkdayAPI.mbot	

Quick Start

3.1.1   Setup

STEP 1 (Setup Automation Anywhere client to send Emails):

Open the Automation Anywhere client and click on Tools > Options

Fill in the required Email SMTP server details along with Username and Password. Click on Apply.
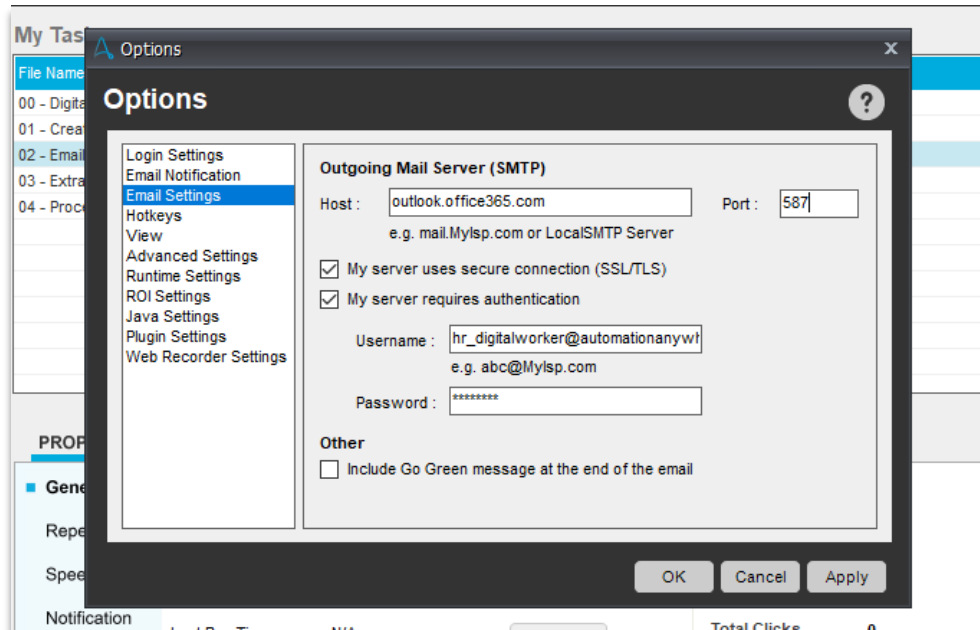
Step 2 (Configure DW Master bot to trigger when a new email arrives in the inbox):

Select the Task Bot – 00 – Digital Human Resources Admin – Master.atmx.

Click on Trigger tab in the lower half of the screen. Select Trigger type as 'Email Message', Action as 'When new Email Arrives' and fill in the incoming email server details (Marked in Red).

Click on Save. The configured Trigger will get added (Marked in Green).

3.1.2   Configuration

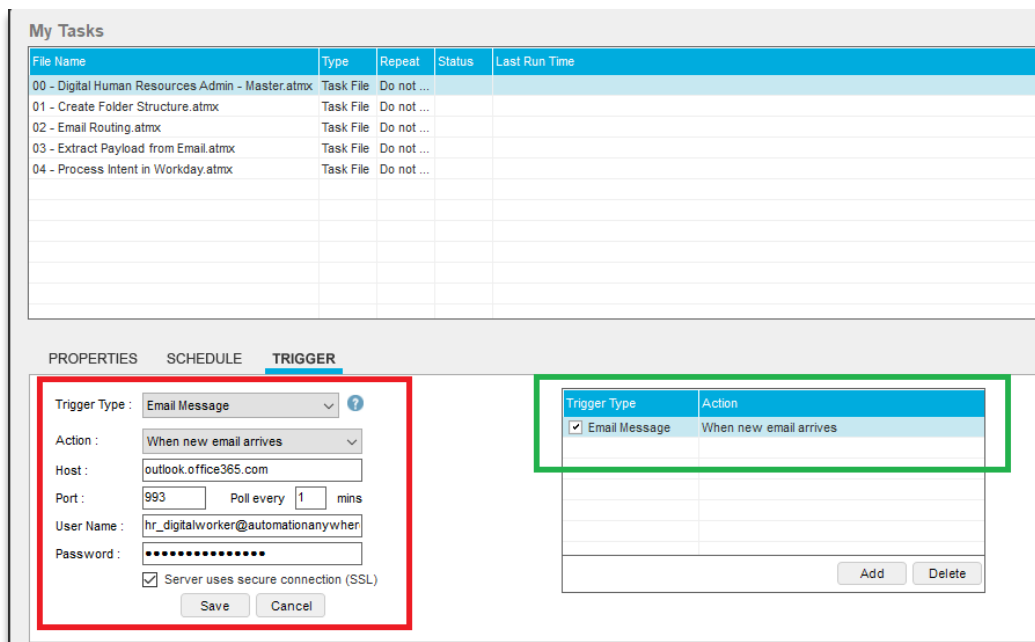**STEP 1 (Configuring Credential in Control Room's Credential Vault)**

Sensitive information such as user credentials, account number, and social security numbers included in automation tasks, should be stored as credentials centrally in the Credential Vault.

These data items are stored securely in the CR and cannot be accessed locally when the bot is executing.

Below, are the step-by-step instructions to set up the Workday and Kore.Ai connectivity in Credential Vault.

- Assign 'Locker Consumer Role' the AA user (bot runner) which ensures the user have full access to the locker
- Create a locker with name "WorkdayLocker"
- Create a credential with name "WorkdayCredentials"
- Add the following attributes to "WorkdayCredentials":

Attribute Name	Value
Username	Workday Integration Username
Password	Workday Integration user Password
WorkdayURLAbsenceManagement	WebAPI endpoint for Absence Management
WorkdayURLPerformanceManagement	WebAPI endpoint for Performance Management
WorkdayURLHRManagement	WebAPI endpoint for HR Management
WorkdayURLPayroll	WebAPI endpoint for Payroll services
WorkdayURLReportGetEmployeeByEmail	WebAPI endpoint for Custom report to search employees by Email

STEP 2 (Configuring Parameters with an External File)

External file can be configured at -

AA Application Path > My Tasks > Bot Store > Digital Human Resources Admin - Automation Anywhere > Input Folder > HRWorkerConfiguration.txt

Below is the how the configuration file looks:

HRWorkerConfiguration.txt - Notepad
File Edit Format View Help
vTemplateName=EMPLOYEE_REVIEW_TEMPLATE-16-71
vDomain=automationanywhere.com
vKoreAIEmailID=hr_digital@bots.kore.com
vDWEmailID=hr_digitalworker@automationanywhere.com

This is where, the input values for variables are stored which is needed by the bot at the time of execution. (Sensitive variables – like user credentials and URLs will be stored in the Credential Vault)

In the HRWorkerConfiguration.txt, put in values according to the bot execution environment.

Below is a table that summaries variable names, types, sample input and other information:

INPUT VARIABLES: NEEDS TO BE CONFIGURED BY THE USER FOR INPUT PARAMETERS				
Variable Name	Type	Mandatory (Yes/No)	Purpose	Example Input
vTemplateName	Text	Yes	The DW will initiate performance review using this Workday Template	EMPLOYEE_REVIEW_TEMPLATE-16-71
vDomain	Text	Yes	DW will accept emails from this domain only	automationanywhere.com
vKoreAIEmailID	Text	Yes	Email Inbox monitored my Kore.Ai bot	hr_digital@bots.kore.com
vDWEmailID	Text	Yes	HR Email Inbox monitored by this DW	hr_digitalworker@automationanywhere.com

4. Reports
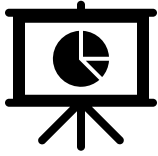
Following Bot Insight report is configured for this DW. This report shows the distribution of requests from employees – by Intent type and by Date.
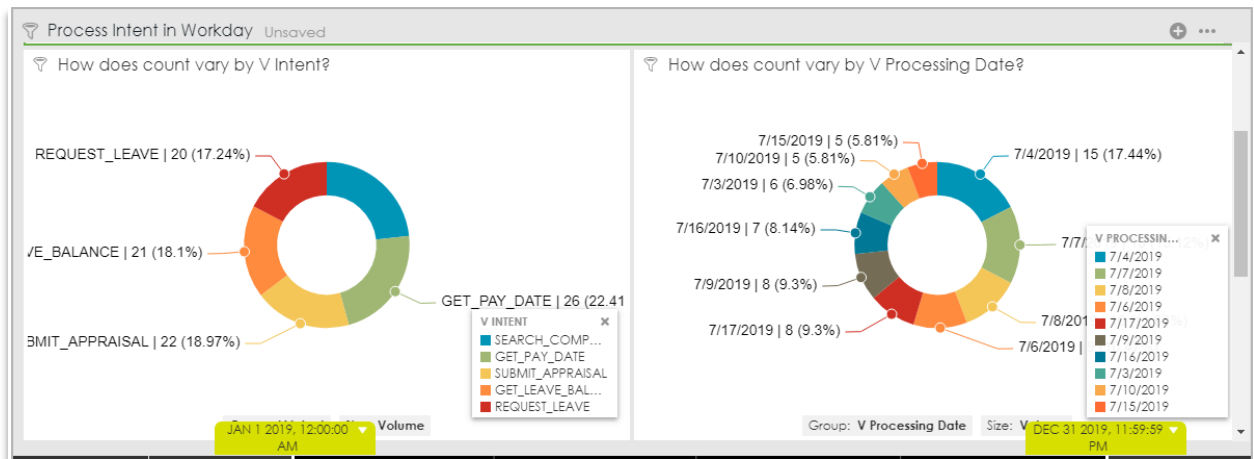
The Data profile Tab in the Insights page shows details regarding the variables tracked:

| Variable Name	Display Name	Datatype	Inclusion	Minimum	Maximum	Average	Sum	Distinct Count	
vIntent	V Intent	String	✓					Rank	5
vProcessingDate	V Processing Date	String	✓					Rank	19

5.   Logs

In case of Errors, Error Logs & Screenshots are generated within Error Folder (Highlighted below in yellow)

- o   My Tasks
  - ▪   Bot Store
    - •   Bot Name
      - o Error Folder
        - ▪ Logs (Folder)
          - ▪   Error Logs Month-Day-Year.txt
        - ▪ Snapshots (Folder)
          - ▪   Error Snap Month-Day-Year HourMinSec.png

Error Logs will contain the below information -

- •   Task Name

- •   Error Line Number

- •   Error Description

- •   Generated Timestamp

Example of Log File:
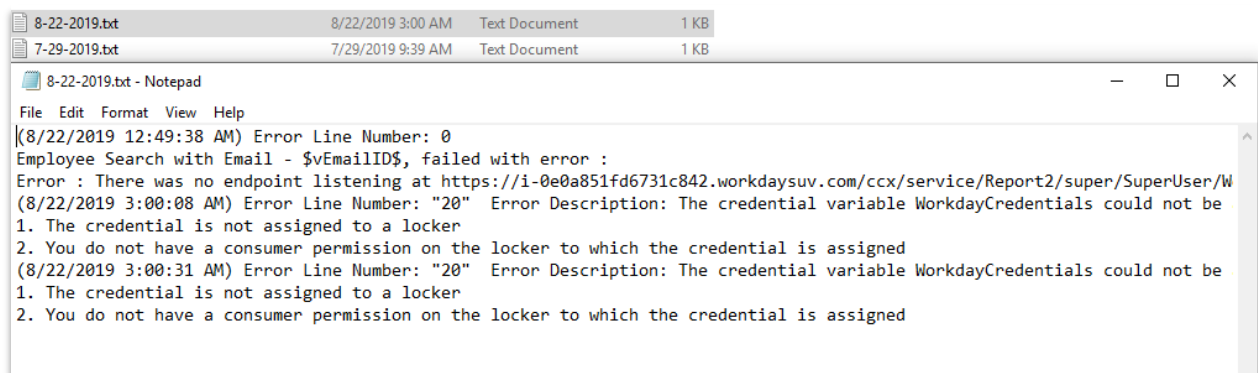
Note: There are no Custom Logs generated for this DW.

Example of Screenshot Generated Error Snap:

6. Troubleshooting & Support

Support

Free DWs are currently not supported directly.

Questions on Bot Functionality or Feature can also be posted to our Community site Apeople

Automation Anywhere provides a Product Documentation portal which can be accessed for more information about AA's products and guidance on building bots and Digital Workers.

The "Build" section of the portal includes these sections:

- Getting Started - information on building bots recommended practices (including use of the Credential Vault)
- Build Advanced Bots - details on MetaBots and the approach to integrating code into them
- Build Digital Workers - high level architecture

FAQs

Q: 'Create Locker' button not visible in the Credential Vault Page.

A: Please check if the role 'Locker Consumer' is assigned to the user and you are using an Enterprise Client version.

Q: I am getting an error with message as 'Invalid Request' from Workday MBot.

A: Please check, if the Workday Integration user has appropriate access to the WebService and related Workday objects.

Q: Emails are not processed automatically.

A: Please verify, if the Trigger setup depicted in Step 2 is done correctly for the Master bot.

Q: Trigger is correctly setup, but still the emails are not processed.

A: Please verify, if the vDomain variable config file configured in Step 2 of Configuration matches the domain of the incoming email.

Appendix A: Record of Changes

No.	Version Number	Date of Change (DD/MM/YYYY)	Author	Notes
1	1.0	22/08/2019	Vibhu Sharma	Version 1 Release

Appendix B: Acronyms

No.	Acronym	Description
1	AA	Automation Anywhere
2	CSV	Comma Separated File
3	DW	Digital Worker
4	CR	Credential Vault
5	CRM	Customer Relationship Management
6	API	Application Programming Interface
7	PC	Personal Computer
8	RAM	Random Access Memory
9	OS	Operating System

Appendix C: References

No.	Topic	Reference Link
1	System Requirements - Client	*Click* here
2	System Requirements – Control Room	*Click* here
3	How to create credential & Locker?	*Click* here
4	Credential Overview	*Click* here
5	Apeople Community Site	*Click* here
6	Product Documentation portal	*Click* here
7	Kore.Ai Platform	*Click* here