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| **Condition** | **Can a SQL Export be deployed to the Web?** |
| ***Unique File Scheduling Requirements***   * The file needs to be scheduled multiple times a day (e.g. every hour) * The customer has several SQL exports where scheduling needs to be staggered at odd times (e.g. 1:03pm). | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\redlight.jpgNO**. Must be a Backoffice export.  The file will need to be scheduled via a SQL job, since the web scheduling will not accommodate scheduling multiple times a day. |
| ***Process Information Passed in BackOffice***   * The export needs to read/process information from the Backoffice “Filename” field (for example, GL accrual files) | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\redlight.jpgNO**. Must be a Backoffice export. |
| ***Multiple Files***   * The vendor needs more than 1 file for distinct data sets. For example, a COBRA export needs to have 1 QB file & a separate NPM file. * The export needs to be separated dynamically into multiple separate files (e.g. 1 file per Pay Group which results in 15 separate files) | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\yellowLight.pngMAYBE**  For the Web, the TC will need to setup separate export session or separate templates for each file and filename. The scheduling for each file would be setup separately in the web for each file.  For Example, a Cobra Export with 2 files, one for QB and one for NPM can be one template with 2 export sessions, or 2 templates (QB and NPM) where one file generates per session or template.  If more than 10 sessions or templates are needed, then the interface should be a BackOffice interface. |
| ***Payroll Automation/Scheduling***   * A payroll/contribution file needs to be scheduled or automated | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\yellowLight.pngMAYBE**  *NOTE: Payroll Automation only works if the client processes payroll in the web. If the client still uses BackOffice payroll, the payroll close step will NOT trigger payroll automation.*  The following options exist for automation of payroll files:   1. **Payroll Automation (Per Payroll/Pay Group):**   A separate file will generate for each Pay Group & will be sent via UDES once the payroll is posted/closed for each Pay Group. If the customer has multiple pay groups that are applicable for this file, the vendor will need to be able to accommodate receiving multiple files per day and date/time stamps on the files to ensure files are not overwritten once received by the vendor. Further, the customer should consider if their reconciliation/accounting practices will support submitting a separate file per pay group to the vendor.   1. **Payroll Automation (Per Pay Period):**   For Sequence 1 Payrolls: A single file will generate for **all** Pay Groups setup under the Payroll Automation rule. The file will be generated & sent via UDES once payroll has posted/closed for **all** Pay Groups specified in the Payroll Automation rule. There is risk of the file not generating if for some reason one of the Pay Groups that has been setup for the Payroll Automation does not actually close its Sequence 1 payroll.  For Sequence 2 -9 payrolls: Files are NOT batched. Separate files are generated for each Pay Group that is closed. If the customer has multiple pay groups that are applicable for this file, the vendor will need to be able to accommodate receiving multiple files per day and date/time stamps on the files to ensure files are not overwritten once received by the vendor.  Additional information on the difference between Per Payroll vs. Per Pay Period can be found at: <https://ultimatesoftware.my.salesforce.com/kA560000000GmpHCAS>  Instructions for setting up Payroll Automation for interfaces can be found at: <https://confluence.ultimatesoftware.com/display/TSDI/SQL+Contribution+Interface>  <https://confluence.ultimatesoftware.com/display/TSDI/UCN+Contribution+Interface>   1. **Setup Web Schedule to run weekly/bi-weekly on the actual pay date:**   A schedule can be setup in the web for payroll files as long as the file will be sent on or after the actual pay date. For example, if the pay date is weekly on Friday, the web schedule can be setup to send the file weekly on Fridays.  The web schedule is **NOT** able to look forward in scheduling. For example, a schedule cannot be setup in the web to run on Wednesdays for the upcoming Friday pay date.  If the automation options listed above do not meet the customer/vendor requirements, the export will need to be a Back Office export & scheduled via a SQL job. |
| ***Interfaces that Use Audit***   * The export relies heavily on audit, Changes Only or COBRA. | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\yellowLight.png**C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.png**YES, (with limited exceptions for interfaces that require heavy performance/processing times)**.  There is a 3 minute timeout window in the Web Portal.  The vast majority of interfaces (even those that may rely on audit) will complete successfully within that 3 min window.  Interfaces should be developed with the intention of deploying them to the Web, unless it is found to be unfeasible during the TC’s QA testing.  If an interface is exceeding the 3 min timeout window during testing:   * The TC should review the programming to see if there are opportunities for optimization. * After optimization efforts have occurred, if the interface is still exceeding the 3 min timeout window, the interface should be moved to Back Office only.   + The TC will be able to quickly move the export from the Web to Back Office using conversion scripts available in Box and/or redeploying the interface after running the RipOut script with @isWeb = ‘N’ |
| ***Unique File Name Requirements***   * The file names need to be dynamically generated based on certain characteristics (e.g. Pay Group, Location, OrgLevel) * The required filename date/time stamp is NOT in one of the following formats:   + YYYYMMDD   + HHMMSS   + HHMMSSssss * The date/time stamp in the filename needs to be the pay date (or some other date) other than the transmission date. | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.pngC:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\yellowLight.pngYES (with some workarounds)**.  When files are setup on the web, UDES will need to rename the system generated filename to the vendor’s preferred file name. The majority of the time, UDES is able to accommodate these requests, unless a unique requirement is requested (as documented to the left).  If unique file name formats are requested:   * Work with the vendor to see they can accept a file name that avoids these unique scenarios. * If the vendor is unable to accept the file names in another format, the interface can still be available in the Web to run OnDemand and/or scheduled via the web.   + **However**, the actual files will NOTappear in the File Transfers screen in the Web. Instead, the files can be sent to the I:\ or J:\ drives for retrieval or UDES transmission.   + In order to use this workaround, the TC will need to ensure ‘UseFileName’ = N & ‘ExportPath’ is set to the desired I:\ or J:\ drive path in U\_dsi\_Configuration. The UDES rule(s) will need to look for the filename generated by the SQL export, rather than the standard filename generated by the Web Portal. |
| ***Manually transmit files to vendor***   * The customer needs to be able to run a file OnDemand & have the file sent via UDES. | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.pngYES**  The customer will need to check the “Transfer open enrollment file to vendor” box each time they wish to send the file via UDES. Even though the file may not actually be an OE export, the web uses the same functionality to deliver the file to the vendor.  The TC will need to ensure the OnDemand session Export Code is named ONDEM\_XOE (with a TEST\_XOE session created when the Test file has differences from the production file). The TC will need to ensure that if there are any actual Open Enrollment sessions, that the export logic does not process the “ONDEM\_XOE” or “TEST\_XOE” file as an Open Enrollment file.  The UDES rule will need to be setup to look for the standard filename that is generated for files by the Web Portal. UDES will need to rename the file to the vendor’s file name format during the transmission process. |
| ***Transmit Scheduled files to vendor***   * The customer needs to have files sent via UDES which are scheduled on the web portal | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.pngYES**  The “File Delivery” box must be selected on the web schedule setup. The UDES rule will need to be setup to look for the standard filename that is generated for files by the Web Portal. UDES will need to rename the file to the vendor’s file name format during the transmission process.    \*\***NOTES ON SCHEDULING VIA THE WEB**:   1. There is currently a bug in the Web Portal for switchbox interface sessions that are scheduled. (<https://ultidev/browse/ULTI-338317>)   Scheduling a “SCHEDULED” Export Session via the web portal will send a corrupted EE list to switchbox if any other switchbox exports (on the web or in Back Office) also have “SCHEDULED” export sessions in AscExp. In addition, the Export Code itself will not be correctly passed to switchbox when the scheduled interface runs in this scenario. The current workaround is for the TC to ensure that the scheduled export code is unique for the interface across AscExp if the file is going to be scheduled via the web. For example, “SCH\_LIB” or “SCH\_PAY” could be used to ensure the scheduled Export Code is unique for each interface that is scheduled via the Web.   1. For Automated Schedules, you must have a dedicated Export Session to setup the Web Schedule, named “SCH\_”. The reason for this is because if you manually run the interface with a Web Schedule on it, then a Ghost Job may be created and can cause issues with the Automated Schedule. If a Ghost Job happens, then please refer to KB Article: <https://ultimatesoftware.my.salesforce.com/kAX3200000002bn?srPos=0&srKp=kaX&lang=en_US> |
| ***File Archiving***   * The file needs to be archived in the I:\ drive, in addition to being delivered to the File Transfers screen on the Web. | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.pngYES**  The current UDES standard for all Web Exports is to archive files at **I:\Exports\Archive\{Vendor}** with the same standard filename that is generated by the web portal (not the renamed filename that UDES may send to the vendor).  Switchbox v2 also allows the TC to specify an ‘ArchivePath’ which can be used to archive a file in the I:\ drive with the same standard filename that is generated by the Web. |
| ***Multiple File Schedules***   * The file needs to be sent 3x per week (e.g. Mon, Wed & Fri @ 6am ET). | **C:\Users\ScottBee\AppData\Local\Microsoft\Windows\INetCache\Content.Word\dT4ozArkc.pngYES**  The TC will need to setup 3 distinct scheduled sessions to accommodate scheduling via the Web Portal. |