Shared Automation Manual

Automation Name

Emp Status Add History Effective Dates

Automation Description

The purpose of the automation is to add Employee Status historical records to an employee within the company system..

Business Process Description

This automation accounts for whether the Employee Action Form is turned on or not for the company, handles making updates for multiple company IDs, and common system errors without disrupting the workflow. This automation can dynamically add historical records based on the different history types listed on the import sheet. The workflow takes about 30 seconds for each record update whereas it takes about 60 seconds to manually make the update per record.

How do I use this automation?

Once you're set up to run flows with Power Automate for desktop, review the information below to use this automation on your laptop.

Where do I need to be in the business process?

Ensure you have logged into the VPN on your computer and have your Chrome Browser open with MyApps.

Make sure your import file has the following headers:

- Company ID
- EE ID
- Effective Date
- Status History Type
- Employee Status
- Eligible for Rehire?
- User Account Deactivation Date
- Change Reason
- Notes

Make sure the date columns are formatted to Short Date format and the import file has only one tab. The import file can be saved anywhere on your computer so long as you are able to upload the import file when the workflow requests it.

Company ID	EE ID	Effective Date	Status History Type	Employee Status	Eligible for Rehire?	User Account Deactivation Date	Change Reason	Notes
111112	1	2/14/2014	T	Terminated		2/14/2014	Misconduct	some kind of note
111112	2	6/24/2024	LOA	Leave of Absence			FMLA	
111112	2	1/1/2025	A	Active			Rehire	
111112	3	1/1/2025	A	Active			New Hire	
111112	4	7/25/2022	LOA	Leave of Absence			Unpaid FMLA	
111112	5	9/14/2023	T	Terminated	Y		Resignation	
111112	6	7/6/2023	T	Terminated	Y		Resignation	
111112	6	8/5/2023	A	Active			New Hire	
111112	7	11/5/2024	A	Active			New Hire	
111112	8	8/12/2024	A	Active			New Hire	
111112	9	6/6/2022	T	Terminated		6/6/2022	Misconduct	
111112	10	4/23/2023	T	Terminated	Y		Resignation	
111112	10	6/5/2024	A	Active			Rehire	

What applications and files need to be ready on my computer?

Ensure you have logged into the VPN on your computer and have your **Google Chrome** browser open with **MyApps**.

Make sure your **import file** is filled out and formatted correctly. The import file should have the following setup

Make sure your import file has the following headers:

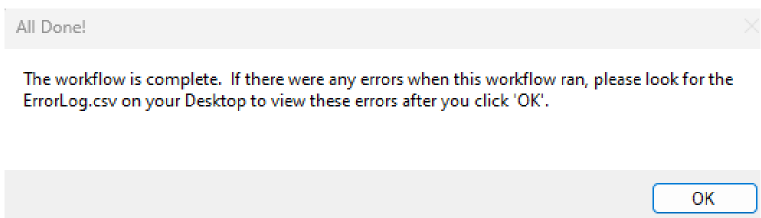
- Company ID
- EE ID
- Effective Date
- Status History Type
- Employee Status
- Eligible for Rehire?
- User Account Deactivation Date
- Change Reason
- Notes

Make sure the date columns are formatted to Short Date format and the import file has only one tab. The import file can be saved anywhere on your computer so long as you are able to upload the import file when the workflow requests it.

Company ID	EE ID	Effective Date	Status History Type	Employee Status	Eligible for Rehire?	User Account Deactivation Date	Change Reason	Notes
111112	1	2/14/2014	T	Terminated		2/14/2014	Misconduct	some kind of note
111112	2	6/24/2024	LOA	Leave of Absence			FMLA	
111112	2	1/1/2025	A	Active			Rehire	
111112	3	1/1/2025	A	Active			New Hire	
111112	4	7/25/2022	LOA	Leave of Absence			Unpaid FMLA	
111112	5	9/14/2023	T	Terminated	Y		Resignation	
111112	6	7/6/2023	T	Terminated	Y		Resignation	
111112	6	8/5/2023	A	Active			New Hire	
111112	7	11/5/2024	A	Active			New Hire	
111112	8	8/12/2024	A	Active			New Hire	
111112	9	6/6/2022	T	Terminated		6/6/2022	Misconduct	
111112	10	4/23/2023	T	Terminated	Y		Resignation	
111112	10	6/5/2024	A	Active			Rehire	

How do I know if the automation was successful?

A display message will pop up at the end of the workflow to indicate the workflow is complete and where to find the ErrorLog file.

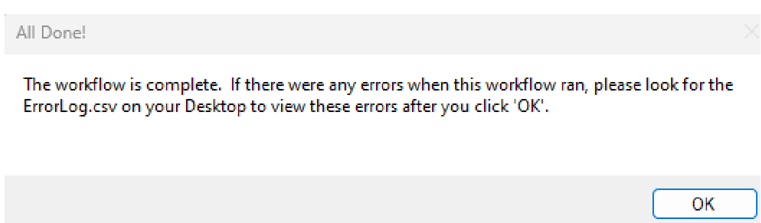


After clicking OK, please check the updates by pulling a report from the report writer in the system and compare the effective dates in the system against the Effective Dates in the import file.

Where can I find details about any errors or exceptions?

While the workflow is running, it is actively logging any errors it comes across in a data table. At the end of the workflow, it will create a CSV file called ErrorLog onto the local Desktop.

A display message will pop up at the end of the workflow to indicate the workflow is complete and where to find the ErrorLog file.



If there is an existing ErrorLog.csv file already on the local Desktop, it will overwrite that file with the recent workflow run.

What do I need to do in the business process after the automation runs?

After the automation is complete, check and review errors listed in the ErrorLog.csv that have been saved to the Desktop.

Run a report from the report writer in the system to double check the data in the system against the data in the import file.

Technical Information

Solution Design

1. Automation prompts users to select the system environment to run the workflow in and upload the input file. Input file should be an Excel file with formatting specified above.
2. Opens the system environment selected.
3. Creates a data table within the workflow to track errors for the ErrorLog document.
4. Opens the upload input file and reads the data within the workbook.
5. Sets the variables for Company ID to "0000" and Employee ID to "0" for the comparison logic in the automation to detect a new company ID or employee ID which will prompt appropriate actions needed to navigate to the new Company ID or employee ID.
6. Loop over rows in Excel workbook. Search for company ID in the existing system window tab provided by the user.
    a. Navigate to the Employment Status page in the system.
    b. Search for the employee by ID.
    c. Determine which Status History to add based on the import sheet.
        i. Click on the add History for the appropriate status
        ii. Check for any error message to prompt built in actions.
        iii. Check for an Employee Action Form setup to prompt the appropriate actions to make the updates.
        iv. Enter data to the fields and save changes.
    d. Evaluate the next row and evaluate whether to navigate back to employee search or company search.
7. Saves the error logs into a CSV file called ErrorLog and saves it within the Desktop folder of the local computer.
8. Displays a message to indicate the automation is complete.

Applications

- Excel
- Google Chrome

- Company system

Inputs

Select which system environment to use: Production or Test

- **Production** is the live environment in which the clients have access to and use for day-to-day use.
- **Test** is a copy of the live environment in which employees can test imports and changes without impacting the live environment (Production).

Import File

- The import file must be in excel and the column headers must be named as:
    - Company ID
    - EE ID
    - Effective Date
    - Status History Type
    - Employee Status
    - Eligible for Rehire?
    - User Account Deactivation Date
    - Change Reason
    - Notes
- There can be multiple rows for each EE ID with different effective dates
- All columns must be filled out.

Company ID	EE ID	Effective Date	Status History Type	Employee Status	Eligible for Rehire?	User Account Deactivation Date	Change Reason	Notes
111112	1	2/14/2014	T	Terminated		2/14/2014	Misconduct	some kind of note
111112	2	6/24/2024	LOA	Leave of Absence			FMLA	
111112	2	1/1/2025	A	Active			Rehire	
111112	3	1/1/2025	A	Active			New Hire	
111112	4	7/25/2022	LOA	Leave of Absence			Unpaid FMLA	
111112	5	9/14/2023	T	Terminated	Y		Resignation	
111112	6	7/6/2023	T	Terminated	Y		Resignation	
111112	6	8/5/2023	A	Active			New Hire	
111112	7	11/5/2024	A	Active			New Hire	
111112	8	8/12/2024	A	Active			New Hire	
111112	9	6/6/2022	T	Terminated		6/6/2022	Misconduct	
111112	10	4/23/2023	T	Terminated	Y		Resignation	
111112	10	6/5/2024	A	Active			Rehire	

Outputs

- This automation makes updates within the company system.
- It also creates an output CSV file called ErrorLog on the user's desktop which lists out any errors the workflow came across while running for the user to review.

Code Overview

Main

Navigate to Production

Navigate to Test

Company ID Search

Navigate to Employment Status page

Setting up employee search parameters to search all employees by ID

Log Error

Add Rehire History

Add Termination History

Add Leave of Absence History

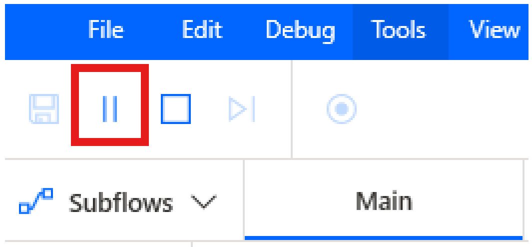
Default Change Reason

Common Errors

1. Excel file not found
    a. Ensure the Excel file is saved in the correct location, adheres to the correct format, and isn't open in the Excel application
2. Company system setup
    a. Make sure you don't have Production or Test open in any other tabs in your Google Chrome browser.
3. Not clicking on the Production or Test environment in MyApps
    a. Scroll your MyApps page to make sure the tile for Production or Test is visible on screen.

Emergency Stop Procedure

a. To pause the workflow, you can click on the pause icon.

i. 

ii. When you are ready for the workflow to pick up where it paused, click on the play icon.

b. To stop the workflow entirely, you can click on the stop icon.

i.