Shared Automation Manual

Automation Name

Cost Center Detail Records Add Records

Automation Description

The purpose of the automation is to add Cost Center records to the Cost Center Detail Records in the company system. This can add in Pay Rate, Charge Rate and indicate if the record is active or inactive.

Business Process Description

In DCA, we have gotten 3 projects from the beginning of 2023 through September of 2024 requesting us to add Cost Centers into the system. These projects would have been completed either manually or by using AutoHotKeys which is a specialized skill and not readily scalable.

This automation takes about 17 to 20 seconds to add each row of 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
- Cost Center
- Code
- Description
- Pay Rate
- Charge Rate
- Active?

Ensure the Code and Description does not contain unsupported symbols. Codes should not have any spaces.

Ensure the Active? Column has either True or False.

Make sure 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.

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	A	B	C	D	E	F	G
1	Company ID	Cost Center	Code	Description	Pay Rate	Charge Rate	Active?
2	111112	Company	ABC123	ABC - 123 AE	0	0	TRUE
3	111112	Department	BCD321	BCD - Accour	0	0	FALSE
4	111112	Work Cntr	ASD354	ASD - Distro	0	0	TRUE
5	111112	Department	AAA111	AAA - Marketi	0	0	TRUE
6	111112	Work Cntr	LKJ987	LKJ - Call Cer	0	0	TRUE
7	111112	Work Cntr	JKL456	JKL - Data Op	0	0	FALSE
8	111112	Company	WER159	WER - 159 Av	0	0	TRUE
9	111112	Work Cntr	OKH753	OKH - Data C	0	0	FALSE
10							

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

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:

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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.

All Done!

The workflow is complete. If there were any errors when this workflow ran, please look for the ErrorLog.csv on your Desktop to view these errors after you click 'OK'.

OK

After clicking OK, please check the updates by pulling a report from the report writer in the system and compare the Cost Centers in the system against 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.

All Done!

The workflow is complete. If there were any errors when this workflow ran, please look for the ErrorLog.csv on your Desktop to view these errors after you click 'OK'.

OK

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 Cost Centers in the system against 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. Creates a data table within the workflow to track errors for the ErrorLog document.
3. Opens the uploaded input file and reads the data within the workbook.
4. Opens the system environment selected.
5. Sets a variable for Company ID to “0000” for the comparison logic in the automation to detect a new company ID which will prompt appropriate actions needed to navigate to the new Company ID.
6. Loop over rows in Excel workbook. Search for company ID in the existing system window provided by the user.
    a. Navigate to the Cost Center Detail Records page.
    b. Search for the Cost Center.
    c. Check for any error message to prompt built in actions.
    d. Click on Add New Detail Record.
    e. Fill out the fields for the new record and save changes.
    f. Evaluate the next row and evaluate whether to navigate back 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
    - ▪ Cost Center
    - ▪ Code
    - ▪ Description
    - ▪ Pay Rate
    - ▪ Charge Rate
    - ▪ Active?
- ○ There can be multiple rows for each EE ID with different effective dates
- ○ All columns must be filled out.

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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

Navigate to specific module

Company ID Search

Navigate to CC Detail Records page

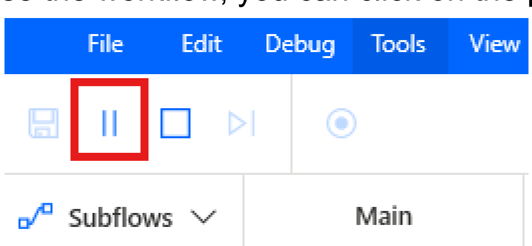
Log Error

Click Cancel for Error

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 Prod 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 in MyApps
    a. Scroll your MyApps page to make sure the tile for Production or Test is visible on screen.
4. Updates are not sticking
    a. Check to ensure there are no unsupported symbols in the code or description in the import file.

Emergency Stop Procedure

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

    b. When you are ready for the workflow to pick up where it paused, click on the play icon.
2. To stop the workflow entirely, you can click on the stop icon.

a.