Shared Automation Manual

Automation Name

Rates > Effective Dates

Automation Description

The purpose of the automation is to look for the effective date provided in the import file and update that record to a new effective date in the company system. Due to the company system, this creates a copy of the current effective date as a historical record so the automation also deletes that record.

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. The automation takes about 27- 36 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
- Current Effective Date
- New Effective Date

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.

	A	B	C	D
1	**Company ID**	**EE ID**	**Current Effective Date**	**New Effective Date**
11	111112	40	4/1/2007	4/2/2007
12	111112	6	1/7/2020	1/8/2020
13	111112	7	10/10/2022	10/11/2022
14	111112	8	2/21/2012	2/22/2012
15	111112	9	4/17/2022	4/18/2022
16	111112	12	8/14/2017	8/15/2017
17	111112	2	6/28/2021	6/29/2021
18	111112	24	12/5/2011	12/6/2011
19	111112	27	6/1/2007	6/2/2007

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

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- EE ID
- Current Effective Date
- New Effective Date

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.

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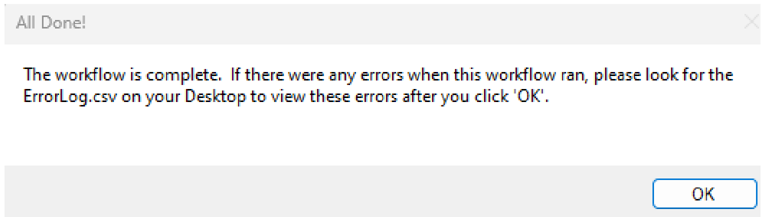
15	111112	9	4/17/2022	4/18/2022
16	111112	12	8/14/2017	8/15/2017
17	111112	2	6/28/2021	6/29/2021
18	111112	24	12/5/2011	12/6/2011
19	111112	27	6/1/2007	6/2/2007

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 New 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.

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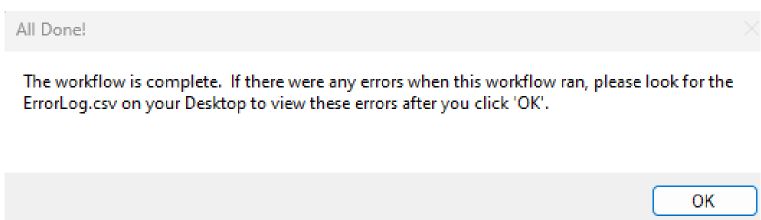


If there is an existing ErrorLog.csv file already on the local Desktop, it will overwrite that file with the recent workflow run.

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 effective dates in the system against the New Effective Dates 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 provided by the user.
    a. Navigate to the Rates page
    b. Search for the employee by ID.
    c. Search for Current Effective Date and click into that record.
    d. Check for any error message to prompt built in actions.
    e. Check for Employee Action Form setup to prompt the appropriate actions to make the updates.
    f. Update effective date and save changes.
    g. Deletes the newly created record that contains the Current Effective Date
    h. 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
    - ▪ Current Effective Date
    - ▪ New Effective Date
- ○ There can be multiple rows for each EE ID with different effective dates
- ○ All columns must be filled out.
- ○

	A	B	C	D
1	Company ID	EE ID	Current Effective Date	New Effective Date
2	1111	6	5/9/2004	5/8/2004
3	1111	6	5/8/2004	5/7/2004
4	1111	6	8/25/2002	8/24/2002
5	1111	6	5/9/2004	5/8/2004
6	1111	7	6/24/2006	6/23/2006
7	1111	7	8/25/2002	8/24/2002
8	1111	7	2/17/2017	2/16/2017
9	1111	9	6/24/2006	6/23/2006
10	1111	9	4/16/2003	4/15/2003
11	1111	9	6/24/2006	6/23/2006
12	1111	13	5/30/2003	5/29/2003
13	1111	13	2/3/1999	2/2/1999
14	1111	13	2/17/2017	2/16/2017

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 Rates page

Setting up employee search parameters to search all employees by ID

Log Error

nonEAF Effective Date

Delete Newly Created Record

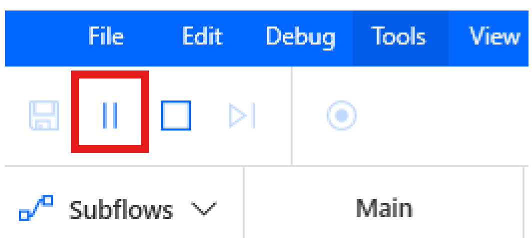
LogError Click Back Arrow

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.

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.