Shared Automation Manual

Automation Name

EE Time Card Pay Type & Atdnce Point Amt

Automation Description

The purpose of the automation is to add Pay Type and add the Attendance Point amount to the date that is listed in the import file.

Business Process Description

This automation creates a more efficient solution to a manual task, reducing the time to make these updates by 50%.

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
- Date
- Pay Type
- Amount

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	Date	Pay Type	Amount
111112	1	8/5/2023	1 Attendence Point	1.00
111112	2	11/5/2024	1 Attendance Point	1.00
111112	2	8/12/2024	1/2 Attendance Point	0.50
111112	3	6/6/2022	1 Attendance Point	1.00
111112	4	4/23/2023	1/2 Attendance Point	0.50
111112	5	6/5/2024	1/2 Attendance Point	0.50

The Pay Periods may need to be opened in Time & Labor in order to make the updates to the employees' time cards.

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:

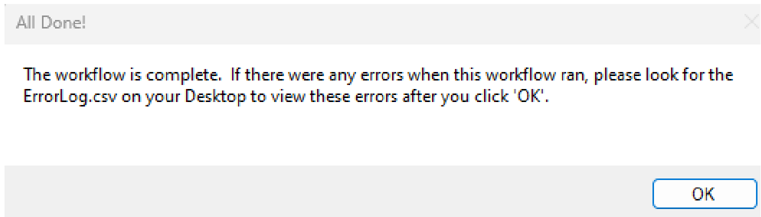
- Company ID
- EE ID
- Date
- Pay Type
- Amount

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	Date	Pay Type	Amount
111112	1	8/5/2023	1 Attendence Point	1.00
111112	2	11/5/2024	1 Attendance Point	1.00
111112	2	8/12/2024	1/2 Attendance Point	0.50
111112	3	6/6/2022	1 Attendance Point	1.00
111112	4	4/23/2023	1/2 Attendance Point	0.50
111112	5	6/5/2024	1/2 Attendance Point	0.50

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.

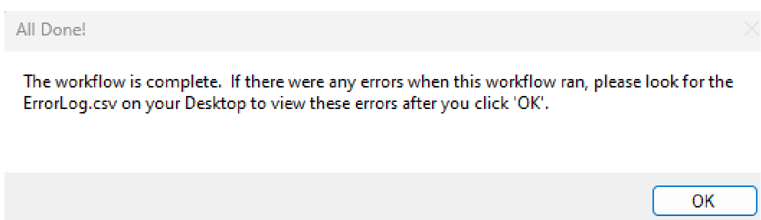


After clicking OK, please check the updates by pulling a report from the report writer in the system and compare the Pay Types and Amounts in the system against the import file.

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.



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 Pay Types and Amounts in the system against the import file.

After checking the work, make sure to close the pay periods that were opened to make these updates.

- *To close the pay periods, go to Payroll > Close Pay Periods*

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 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 Time Card page
    b. Search for employee by ID
    c. Clicks on Add Pay Type
    d. Selects the Pay Type
    e. Insert date
    f. Adds amount in # hours field and saves changes
    g. Check for any error message to prompt built in actions
    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
    - Date
    - Pay Type
    - Amount
- There can be multiple rows for each EE ID with different effective dates
- All columns must be filled out.

	A	B	C	D	E
1	Company ID	EE ID	Date	Pay Type	Amount
2	111112	1	8/5/2023	1 Attendence Point	1.00
3	111112	2	11/5/2024	1 Attendance Point	1.00
4	111112	2	8/12/2024	1/2 Attendance Point	0.50
5	111112	3	6/6/2022	1 Attendance Point	1.00
6	111112	4	4/23/2023	1/2 Attendance Point	0.50
7	111112	5	6/5/2024	1/2 Attendance Point	0.50

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 Employee Time Card

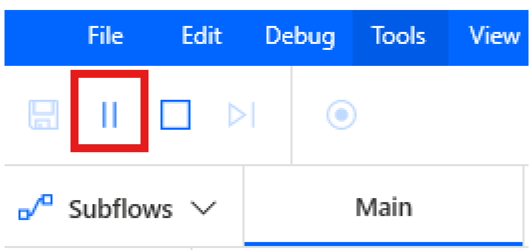
Log Error

Click Cancel to Skip

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. Updates are not sticking
    a. Make sure the pay periods are turned on in order to make the updates within the employees' time cards.
        i. To do so, go to Payroll > Open Pay Periods

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.