

**CR Number:** CR00003245

**Scheduled Start:** 10/20/2024, 3:00 PM

**Scheduled End:** 10/24/2024, 3:00 PM

**Actual Start Date:** 10/20/2024, 3:00 PM

**Actual End Date:** 10/24/2024, 1:45 PM

**Change Summary:** [SYSUPDATE-4890] Task Scheduler: Automating reminders for contract renewals in Teams and Outlook

**Change Type:** Normal

**Performed by:** svc.ca.23.ext.jason.lam@soltech.com

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**Change Description:**

SYSUPDATE-4890

Task Scheduler: Automating reminders for managers to take timely actions for contract renewals through Teams and Outlook.

**Description:** Automatically sending notifications to managers and team members for upcoming contract renewals to ensure timely actions, reducing manual interventions.

**Business Background:**

The current process for reminding managers about contract renewals involves manual follow-ups by the HR team due to notification overload. This new automation will streamline the reminder process and ensure better compliance.

**Justification:**

**Business Justification:**

Implementing automated reminders will reduce manual work and improve task management by ensuring managers receive timely prompts via Teams and Outlook, leading to improved efficiency.

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**Implementation Plan:**

Deployment of this CR will be done on 20-October-2024 into the PRODUCTION environment with a rollback window:

**Detail deployment steps and estimated timing:**

20-October-2024, 03:00 PM - 20-October-2024, 03:30 PM

1. Export workflow from staging.
2. Import workflow into production.

3. Setup production environment and connections.
4. Start the automated workflow.

**Validation/Sanity:**

20-October-2024, 03:31 PM - 24-October-2024, 03:00 PM

New/Updated workflow to be deployed to production:

**Workflows:**

- HRCONTRACT-RENEWAL\_CR: Teams and Outlook reminders for contract renewals
- SCHDL-ITUPDATE\_SR: Daily Scheduler

**Other changes:**

Update lookup table: HR Global Data

**Is this project-related?** No

**Change Execution:**

1. Export workflows from staging.
2. Import into production workspace.
3. Setup environment settings and lookup tables.
4. Start the workflow.

**Who will perform the activities?**

- Deployment: Jason Lam
- Developer: Mary Wong

**List of impacted applications:**

Teams, Outlook, HR Management System

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**Back-out Plan:**

1. Rollback estimate: 30 minutes
2. Revert workflow to previous version and verify functionality.
3. Notify the following:
  - IT Operations: John Doe
  - Stakeholders: Alan King

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**Communication Plan:**

1. Inform IT Operations and stakeholders during and after the change.
  2. No end-user communication required as there is no expected downtime.
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**Testing Evidence:**

**SIT:** SIT-SYSUPDATE-4890

**Functional Specifications:**

1. Reminders for contract renewals for all departments except Finance.
  2. Notifications trigger 60/45 days before expiration.
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**Technical Design:****Recipe Design Document:**

HRCONTRACT-RENEWAL\_CR: Teams and Outlook Reminders

SCHDL-ITUPDATE\_SR: Daily Scheduler

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**UAT Documentation:**

**UAT:** UAT-SYSUPDATE-4890

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**Post-Implementation Steps:**

1. Monitor the workflows for errors or unusual behaviour.
  2. Validate successful execution with the user - Alan King.
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**Post Implementation Review:**

Execution date: 10/20/2024

Success Job Link: HRCONTRACT-RENEWAL\_CR: Teams and Outlook Reminders

**Developer:** Mary Wong

**BA:** Sarah Liu

**BU:** Alan King

