MS New Hire

Requirements

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1. OVERVIEW

Version

1.0

Author

lhardjono

* + 1. MAIN PROCESS
    2. PROCESS ELEMENTS
       1. Project Summary

Project Dashboard

[MS New Hire Reporting Dashboard](https://app.smartsheet.com/dashboards/vQcxcP8Q8p3pF7vrfcRRpp76jCCrX6RwhFfG3671)

5W+1H

| Type | Name | Description |
| --- | --- | --- |
| What | Objectives | To automate the New Hire reporting process. |
| What | Deliverables | Unattended bot that will be run on a weekly basis. |
| Who | Project Sponsor | Tracy Cunningham |
| Who | Project Manager | Lisa Hardjono |
| Who | Product Owner | Heather Chase |
| Who | Analyst | Lisa Hardjono |
| Who | Engineer | PeopleShores |
| Who | Tester | Lisa Hardjono |
| Who | SME | Kaci Myers |
| When | Timeline | Q4 2020 |
| Where | Location | The data source is hosted on UltiPro which will be accessed via a Cognos report. The target source is MS New Hire web site. |
| Why | Problem Statement | The state of Mississippi requires businesses to report all new hires within 15 days of hiring. Currently, Heather Chase is the only staff who performs this function. She manually exports the data from UltiPro and imports the file to the MS New Hire site. With only one person assigned to perform this function, HORNE is facing a single-threaded operation that bottlenecks on Heather's availability.  HORNE has capabilities to pull data from UltiPro via API and stores it on the on-prem data warehouse. However, since the dataset for new hire reporting has salary information, this process does not need to be grouped into the current data pull processing. HORNE needs to be able to separate data processing for items that have secured information.  Although UltiPro has API, the MS New Hire website does not have API capabilities. |
| How | Current State | Heather Chase logs into UltiPro and runs the New Hire Cognos report to export the data. Then, she logs into the MS New Hire to upload the file. She receives an email in her mailbox that lets her know if there is an issue with the upload. |
| How | Future State | An automated process will export the new hire data from UltiPro and generate an import file. The process will then import that file into MS New Hire, check the designated mailbox for email from MS New Hire, and detect if the email has any error notification. If error is detected from the email, an alert will be sent to the designated People FIRST staff to take corrective action. A mechanism to rerun the process will allow People FIRST to ensure that the correct records will go into MS New Hire site. |

Scope

| Name | Description |
| --- | --- |
| In Scope | Any manual process needed to export the data from UltiPro and upload to MS New Hire. |
| Out of Scope | Any manual process involved to correct any import error. This requires someone who can look through the UltiPro data entry and determine if it's a data entry issue or a Cognos filtering issue. |

Terminology

| Name | Description |
| --- | --- |
| MS | The state of Mississippi. |
| UltiPro | The Source of Record for staff information. It is a cloud, web-based solution. It hosts staff information such as name, address, hire date, status, etc. |
| Cognos | The reporting tool that is used by UltiPro. |
| MS New Hire Website | The target website that the new hire records need to be uploaded. They have specific requirements on how the file needs to be formatted. |

* + - 1. Analysis

Time/Effort

| Activity | Staff Count | Effort | Effort Unit | Frquency | Frequency Unit | Notes |
| --- | --- | --- | --- | --- | --- | --- |
| Report New Hire to Authority | 1.00 | 15.00 | Minute | 1.00 | Per Week |  |
| Fix Error | 1.00 | 30.00 | Minute | 1.00 | Per Quarter | This activity is only needed when error is detected after the new hire file has been uploaded |

* + - 1. Definition of Done

Prerequisite

| Name | Description |
| --- | --- |
| People FIRST Service Mailbox | Create a service mailbox for People FIRST to run new hire automated process |
| Create People FIRST UltiPro account | Create a service account in UltiPro to access teh Cognos report for bots |
| Credential | Credentials for UltiPro and MS New Hire are needed. How does AA store this information? Is it encrypted so only designated developers can have access to this? |

Acceptance Criteria

| Name | Description |
| --- | --- |
| Bot is deployed on prod | The bot is deployed on the production server in the correct folder for People FIRST |
| Folder structure is set up | Folder structure is setup properly on the prod VM environment for input, output, and log |
| New Hire data file is generated | The bot successfully creates New Hire data file in the destination folder |
| New Hire data file is uploaded | The bot successfully uploads the New Hire data file to MS New Hire website |
| Error notification is sent | People FIRST New Hire processor is notified when the MS New Hire upload notification email shows error |
| The bot schedule is activated | The bot is scheduled for an unattended run based on the requirement |

* + - 1. Question

Question

| QID | Description | SME | Response |
| --- | --- | --- | --- |
| Q001 | MS New Hire has instructions on how the data can be sent to them: https://www.ms-newhire.com/ftp. For future improvement, we may look into using FTP. | Heather/Kaci |  |
| Q002 | What day and time does the schedule needs to be run?  · Consider if there is error, a human needs to correct it. Will this corrected records need to be rerun on the same day? If not, how will the Cognos report know what data need to be repull on the next run after the correction is done.  · Make sure that the Cognos report covers dataset from the last export (e.g., if run at 8:00 am weekly, then next week report should cover new hires added after the scheduled time). |  |  |
| Q003 | Do we need a mechanism that can detect if the email is bounced back as undeliverable? | Heather/Kaci |  |
| Q004 | Do we need a way to either resend the email or get access to the error without being tied to the email if the email is bounced? | Heather/Kaci |  |
| Q005 | Do we need an unattended bot version to rerun the process after error is fixed? If not, how would the fixed record be uploaded to MS New Hire? | Heather/Kaci |  |

* + 1. OVERVIEW
    2. PROCESS ELEMENTS
       1. Report New Hire to Authority

Process

[Report New Hire to Authority - New Hire Reporting](#aeeb1623-7695-4500-a6d6-8498c9150480)

1. REPORT NEW HIRE TO AUTHORITY

Version

1.0

Author

lhardjono

* + 1. NEW HIRE REPORTING
    2. PROCESS ELEMENTS
       1. Start

Description

The New Hire report should be scheduled on a weekly basis.

Cycle

R1/P7D

* + - 1. Go to UltiPro Website

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | UltiPro Website: https://nw11.ultipro.com/Login.aspx?ReturnUrl=%2f |  |

Business Rule

| Type | Description | Notes |
| --- | --- | --- |
| Policy | BR001: The process is run automatically on a schedule | See question Q002 on frequency for bot scheduling and consideration |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Website error - Internet connection issue |  |
| Error | Website error - URL spelling issue |  |

* + - 1. Log Into UltiPro

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | UltiPro Username: [?] |  |
| Input | UltiPro Password: [?] |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Login error - username issue (misspelled, etc.) |  |
| Error | Login error - password issue (misspelled, expired, etc.) |  |
| Error | Login error - account issue (does not exist, locked, etc.) |  |

* + - 1. Browse to MS New Hire Report

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | Cognos New Hire Report: [?] |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | File not found - access issue (account has not permission) |  |
| Error | File not found - file path issue (moved, deleted, etc.) |  |

* + - 1. Export Report

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Output | New Hire Data File: Output\YYYY\_MM\_DD\_NewHire.csv |  |

Business Rule

| Type | Description | Notes |
| --- | --- | --- |
| Policy | BR002: Any file processing must be completed before running the next process |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Fail to generate file - access issue (account has no create/write permission) |  |
| Error | Fail to generate file - path does not exist |  |

* + - 1. Check Export File

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | New Hire Data File: Output\YYYY\_MM\_DD\_NewHire.csv |  |

Business Rule

| Type | Description | Notes |
| --- | --- | --- |
| Policy | BR003: File to be processed must exists before running the process |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Optional | End process - if there is no record to be uploaded |  |

* + - 1. Stop (No Record)

Description

Stop the process if there is no new hire records to be uploaded.

* + - 1. Go to MS New Hire Website

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | MS New Hire Website: https://www.ms-newhire.com/login |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Website error - Internet connection issue |  |
| Error | Website error - URL spelling issue |  |

* + - 1. Log into MS New Hire

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | MS New Hire Username: [?] |  |
| Input | MS New Hire Password: [?] |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Login error - username issue (misspelled, etc.) |  |
| Error | Login error - password issue (misspelled, expired, etc.) |  |
| Error | Login error - account issue (does not exist, locked, etc.) |  |

* + - 1. Upload File

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | New Hire Data File: Output\YYYY\_MM\_DD\_NewHire.csv |  |

Business Rule

| Type | Description | Notes |
| --- | --- | --- |
| Policy | BR003: File to be processed must exists before running the process |  |

* + - 1. Check Email for Error

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | Mailbox Account: [?] |  |

* + - 1. Parse Email

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | Email message from vendor |  |

Business Rule

| Type | Description | Notes |
| --- | --- | --- |
| Policy | BR004: Number of records found in the file matches with number of records that were uploaded |  |
| Policy | BR005: Zero records were duplicates and were not loaded |  |
| Policy | BR006: Zero records were found to be invalid and could not be loaded |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Optional | End process - if there is no error detected |  |

* + - 1. Send Alert

Input/Output

| Type | Description | Notes |
| --- | --- | --- |
| Input | Error Email Recipient: [?] |  |
| Output | Email message with error description |  |

Alternate Path

| Type | Description | Notes |
| --- | --- | --- |
| Error | Email error - bounced with undeliverable message | · There needs to be a mechanism that can detect if the email is bounced back as undeliverable  · There needs to be a way to either resend the email or get access to the error without being tied to the email if the email is bounced |

* + - 1. Fix Error

Description

Currently, fixing the issue is done manually.

* + - 1. End

Description

End of process