**Handover Document**

Purpose: The purpose of this document is to denote the handoff from the configuration specialist to the IT partner. This document must outline the differences between the test environment and the production environment.

**Advanced Configuration Specialist Name:** Yajas Dwivedi

**Process Name:** Tax R&D Work Order Lookup

**Leo Library:** Tax

**Wizard Name(s):**

* Work Order Lookup
* Run Work Order Lookup from Leo Player

**List all users who will run via Leo Player**

|  |  |  |  |
| --- | --- | --- | --- |
| **Wizard Name** | **User Name** | **EID** | **Do they need to have Leo Player Installed?** |
| Run Work Order Lookup from Leo Player | Kevin Schroeder | E81718 | Yes |
|  |  |  |  |
|  |  |  |  |

**Changes to Variables** (use a separate table for each Wizard)

Wizard Name:

|  |  |  |  |
| --- | --- | --- | --- |
| **Variable Name** | **Step Num and Name** | **Test** | **Prod** |
|  |  |  |  |
|  |  |  |  |
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**Changes to Credentials Vault**

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| --- | --- | --- |
| **Credential Type** | **Step Num and Name** | **Describe** |
| PowerPlant Credentials | Step 3 Unassisted User Login is now disabled for the production instance as it was pointing to test. | Disabling the test instance window. |
| PowerPlant Credentials | Step 4 Unassisted User Login is now enabled for the test instance as it was pointing to production. | Enabling the production instance window. |
|  |  |  |

**Changes to Schedule an Automation Task (if this command was used)**

|  |  |
| --- | --- |
| **Item** | **Notes** |
| Create custom wizard ID | Custom Wizard Id = WorkOrderLookup |
| Change the Robot assignment | From: ROBOT001 To: ROBOT002 (On step 4). If the robot is not listed in the list, then add it by clicking add and adding the robot for the first time in the box. (under the specific user tab enter the display name as ROBOT002–PowerPlan name AND enter username and password) After that close and open again and select the appropriate user (ROBOT002 for example). |
| Remove the 2nd tab key board short on step 4 | This is to ensure we stay on the production environment and do not go to test. |
| Edit the last keyboard shortcut step on step 4 | From:    To: |
| On the Run Work Order Lookup from Leo Player Wizard – modify add automation task to queue | Navigate to Robot tab and modify from: Robot-001 to Robot-002 |
| Add the wizard custom ID | Navigate to production Studio and go to tools-> wizard custom IDs, click add, then select tax folder, select tax R&D work order lookup. Then select Tax R&D work order lookup process. Then select OK. Then create the WorkOrderLookup as mentioned in the first step. |

**List any additional items that run differently in test and production not already mentioned above:**

**If scheduled or triggered, include the relevant details:**

**Kryon Tickets that were created based on this process**

|  |  |  |
| --- | --- | --- |
| **Ticket No.** | **Brief Description** | **Disposition** |
|  |  |  |
|  |  |  |
|  |  |  |

**Other general notes:** (add any notes IT needs to be aware of in regards to running times, specific app settings or window settings)