Contents

[Change History 3](#_Toc535591093)

[Stakeholders 3](#_Toc535591094)

[Subject Matter experts 3](#_Toc535591095)

[Approvals 3](#_Toc535591096)

[Project Overview 5](#_Toc535591097)

[1. Smart Form Page 0 5](#_Toc535591098)

[2. Smart Forms 1.0 Project Scope 7](#_Toc535591099)

[2.1 About Smart Forms 1.0 – Data Management 7](#_Toc535591100)

[2.2 High level scope 7](#_Toc535591101)

[2.3 Transaction Scope 8](#_Toc535591102)

[2.4 Out of Scope 8](#_Toc535591103)

[3. Current State and As Is Flow 9](#_Toc535591104)

[3.3.1 Future State Process 10](#_Toc535591105)

[3.3.2 Process Flows 11](#_Toc535591106)

[4.0 Assumptions and Risks 12](#_Toc535591107)

[5.0 Requirements 13](#_Toc535591108)

[5.1 Landing Page for Smart Form (TBD) 13](#_Toc535591109)

[5.2 Validation process on routing to smart form. 13](#_Toc535591110)

[5.3 Validation After landing on and in process of executing transaction with in smart form 13](#_Toc535591111)

[5.5 Individual request 14](#_Toc535591112)

[5.6 Mass update request 14](#_Toc535591113)

[5.7 Safety Valve 14](#_Toc535591114)

[5.8 List of transaction that need to be include in smart form 15](#_Toc535591115)

[5.9 Data feed to Smart form (In progress, need to shape up more during system design review.) 15](#_Toc535591116)

[5.10 Smart form monitoring and performance (In progress will be working more on system design phase) 15](#_Toc535591117)

[5.1 Taking Approval within Smart Form (In progress, need to shape up more during system design review.) 15](#_Toc535591118)

[5.0 Non Functional Requirements (In progress will be working more on system design phase) 15](#_Toc535591119)

[6.0 Use Cases 16](#_Toc535591120)

[7.0 Resources 16](#_Toc535591121)

[8.0 Appendices 17](#_Toc535591122)

[Appendix A – Definitions/Acronyms 17](#_Toc535591123)

[*Appendix B – Ticket and CTI details* 19](#_Toc535591124)

[*Appendix C – Discovery Package* 19](#_Toc535591125)

[*Appendix D – Self Service Availability ( In Progress for more research )* 19](#_Toc535591126)

[*Appendix E – Data Input required for self service and ticketing decision.( In progress for more research )* 19](#_Toc535591127)

[*Appendix F – Indicative data of employee and queries result. .( In progress need to refine Based on RPA need )* 20](#_Toc535591128)

[*Appendix G – Transaction Requirement and Validation rule.( In progress )* 23](#_Toc535591129)

[9.0 Questions 26](#_Toc535591130)

Change History

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Description | Changed By |
| 1/14/18 | 1 | Draft | Abhinav Sharma |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Stakeholders

|  |  |  |
| --- | --- | --- |
| Name | Role | Organization |
| Jim MacDougall | Director | HR services |
| Chris Bodlovic | Director | Global HR solution |
| Orla Weare | Sr Manager | HR services |
| Ashok Verma | Sr Manager | Global HR solution |
| Ewa Ziemkowska | Business Program Manager, Smart Form | HR services |
| Malissa Ford | Program Manager | Global HR solution |
| Nitin Agarwal | Business Program Manager, RPA | HR services |
| Sandeep Kali | Sr Manager ACES | HR services |
| Gary Tessler | Portfolio Manager | Global HR solution |
| Arijit Basu | Hub Leader | HR services |
| Raj Kumar | Data Management global lead | HR services |
| Abhinav Sharma | Business Analyst | Global HR solution |
| Cheryle Johnson | Self-Sufficiency | Employee Experience |
| Rajnish Batra (RB ) | LTI – Client manager | LTI |
| Kenneth Bowers | LTI- Program Manger | LTI |
|  |  |  |

Subject Matter experts

|  |  |  |
| --- | --- | --- |
| Name | Team | Organization |
| Akram Basha | **Data Management** |  |
| Rajat Paul | **Data Management** |  |
| Malissa Ford | **Program Manager** |  |
| Abhinav Sharma | **Business System Analyst** |  |
| TBD | **Development Manager** |  |
| Navya Sree | **DM SME** |  |
| Mohammed Tausif | **DM SME** |  |
| Anand Gaud | **DM SME** |  |
| Prithvi Raj | **DM SME** |  |
| Prasanth Durga | **DM SME** |  |
|  |  |  |

Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Name of approver | Team |
| 01/14 | V0- Draft |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Project Overview

# Smart Form Page 0

1.1 Introduction

Smart Forms is a part of a broader Amazon HR Services Jarvis program aimed at eliminating manual work and defects with automation. Solutions developed under the Jarvis roadmap will enable the HRS organization to scale and keep up with the growing demand for services.

Expected outcome of the Smart Forms project is a product that guides the requestor through the process of submitting their ask, validates their request for multiple factors and ultimately facilitates easy submission of a complete, correct and valid request. Follow on bots or other RPA projects will then be able to take the structured input and automate processing or completing the request.

Ultimately, the solution created for Smart Forms should be able to accommodate and enable all processes from HR Services realm – development and releases will be prioritized based on the defect ratio and other available solutions.

This document details scope and approach around the first release of the solution – Smart Forms 1.0 for Data Management.

1.2 Business Case

While ultimately the solution will be deployed to all employees and to support all HRS processes, the agreed approach is to start with a Minimum Viable Product (MVP) and release subsequent iterations. Data Management releases received the code of 1.0 with subsequent decimals (2,3 etc.) to reflect developing Smart Form for Data Management use cases.

**Smart Form 1.0**

Data management is currently one of the highest transaction volume processes and one where most defects are generated. Available self-service solutions (PeopleSoft and AtoZ) are not fully adopted and HRS frequently manually processes transactions that should be self-served by employees. Ticketing, a complex solution with little guidance and no validation is used by employees and HR generalists to submit requests. Approximately 70% of defect come in ticket submitted to Data Management are captured under four root causes: Missing Information, Incorrect Information, Missing Attachment, Missing Approval. These defect drivers force HR Services administrators to follow up with requestors, frequently multiple times, to obtain all elements of the request before successful processing.

**Current State**





\*Input Defects root causes category: Missing Information, Incorrect Information, Missing Attachment, Missing Approval

\* September is not a full month data, it’s the month when this matrix is introduced.

1.3. Success Metrics

Smart Form application will alleviate the manual work associated with follow ups, increase usage of available self-service and help structure and validate input, to increase RPA success rate. Smart Forms will also provide a better user experience to employees and HR generalists, guiding users to the right channel to resolve their request quickly and first time right.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Expected go Live date** | **Self – service Impact** | **DM Defect reduction impact** | **FTE saving (eliminating manual transaction )** | **Quick Link usage** |  |
| **2019 – Q1** | * Increase usage of available self-service by 40-50% * Reduce volume of TTs for personal data changes – 50% | * 5-15% reduction in Input Defects\* for Data Management * SLA met increase from 82% to 90% * Input Defects down to 6% (from 11%) |  | Current usage is 20% can be increased by 5-10% for DM |  |

# Smart Forms 1.0 Project Scope

## About Smart Forms 1.0 – Data Management

Smart Form is a dynamic web based form solution used for collecting, navigation, validating and writing HR service related requests submitted by a variety of employees across Amazon. Below are some of the features that will be core part of Smart Form.

* Smart Form helps the requestor narrow their search and points the requestor to the right channel to submit their query.
* Smart Form guides employee/manager/HR employee through raising the request.
* Smart Form captures required approvals.
* Smart Form enables executing a mass upload request.
* Smart Form is integrated with current ticketing, SIM and future workflow tools.
* Smart Form enables changes/correction to multiple fields at same time (for Data Management).
* Smart Form enforces requestor to complete all required field before submitting the form.
* Helps user with navigation and information on what is required and possible why (eg. Permanent address change cannot be legally processed without a signed affidavit or institutional confirmation)
* Smart Form is able to capture user response, history of changes and employee data in an efficient way.
* Smart Form enables creating reports for HR teams to use for operational purposes.

## High level scope

Functional

**Smart Form 1.0:**

Build a web-application (Smart Form) to:

* Serve as a single entry point for data management requests for APAC, EMEA,AMERICAS region (countries mentioned in [Appendix J](#_Appendix_G_–))
* Redirect the following transactions to PeopleSoft self-service.
  + Preferred Name
  + Gender
  + Race/Ethnicity
  + Veteran Info
  + Disability Info
  + Deemed Export Info
  + Emergency Contact
  + Home and Mailing Address
  + Email Address
  + Phone
  + Business title
  + Supervisor change
  + Department
  + FCLM Area and FCLM job
  + Shift Pattern and ADP shift
  + Product Line(Retail)
* Validate bulk requests for accuracy of each row for transaction that are in scope for bulk uploads
  + Business title
  + Supervisor change
  + Department
  + FCLM Area and FCLM job
  + Shift Pattern and ADP shift
* Create tickets via Quicklink for requests that are not redirected to PeopleSoft self-service.
* Escape valve is created to allow requester generate a ticket out of Smart form. Enable escape valve to capture the reason when user are unable to use the self-service and generating ticket using it.

**Smart Form 1.1:**

* In addition to Smart Form 1.0 we will enable this version to reduce the volume of ticket such as Fake self Service (department for initial release) where earlier there was a ticket but now we will use an RPA to write the changes using Smart Form output.
* For Non self-service transaction provide a web form which will validate and capture request from user before creating the ticket (via API or Quicklink).

Geographic

Please look in [Appendix J](#_Appendix_G_–) for knowing countries which fall under the scope.

## Transaction Scope

All transaction for Data management (Personal and Job change) should be included for Smart Form. (\*We can just activate the one we had in scope for other we can have quick link to create a request)

Please see list of all transaction in [Appendix G](#_Appendix_G_–)

## Out of Scope

|  |  |  |
| --- | --- | --- |
| Region | Transaction | Comments |
| Other than Americas , EMEA , APAC region which are identified in Appendix J | Other than the transaction that are in scope for person and job. All other transaction are out of Scope. | Countries and transaction which are not mentioned above will be used as filter for smart form for initial wave |

.

# Current State and As Is Flow

### 3.1 Current State Process

## 

For Smart form there is no current process.

The use case picked for smart form are transaction managed by HR services Data Management team. Based on analysis for transaction handled by DM team from July to Sep 2018. In the chart below 40% of transaction from Personal data changes could have been done through self-service and user don’t even had a need to raise a ticket and come to Data Management team for that ask.

Similarly for Job fields there are self-service transaction that are available and user could have done XX% (TBD ) of transaction by themselves.

|  |  |  |
| --- | --- | --- |
| Total transaction Column | Current RPA System coverage  \*Current RPA system (IVS) Going to be Deprecated in Jun 19 | Covered with Wave 1 Smart form  \*Going live Approx. March 19 |
| All personal and Data changes transaction for DM = 1,945,591 (100%) | In Scope 1,206,110(62%)   1. Personal Data Changes 44,787(3.7%) 2. Job Data changes 1,161,323 (96.3%) | 40% of personal changes with self service  XX% of job data changes (TBD ) |
|  | Out of scope 739,481(38%)   1. Personal Data Changes 67,594(8.9%) 2. Job Data Change 673,687(91.1%) | 40% of personal changes with self-service that are currently out of scope.  XX% of job data changes (TBD) |

\*Job Data transaction are mix of individual and bulk upload so it is tough to decide. How much % of the transaction could have been done via self-service at this point.

### 3.2 Process Flows

### 3.3 Future State and To Be Flow

## 3.3.1 Future State Process

*Smart form will be used which will able to direct user into*

## 3.3.2 Process Flows

 

This is saved as a separate document in WorkDocs all process flows for Smart form are located here: [Process Flow](https://amazon.awsapps.com/workdocs/index.html#/folder/80099bcbb962c087cdcd6a3d47f070c0b7036d47c80192268622effaf590c88c)

# 4.0 Assumptions and Risks

### 4.1 Assumptions

* + 1. Employee data is accurate in people portal at the time its fed onto Smart form
    2. There is a regular feed (need to decide frequency) from people portal to Smart form.
    3. Associate data will be managed in PeopleSoft. Export of data will follow existing global standard processes unless otherwise specified in the requirements
    4. Global standards will be implemented unless regulatory requirements do not allow or exception is approved by the standards committee
    5. If a population group is not listed in the requirement, that population group is not applicable/out of scope.

### 4.2 Risks

* + 1. Scope is limited in first phase, which can discourage adoption employee – employee might not be able to solve their need in a first go.
    2. Landing page of smart form is not decided yet.
    3. Workday implementation: scope and requirements are still being finalized, so it is not yet possible to assess how Smart Forms would fit it. Workday configuration might eliminate some of the current use cases entirely, while not capturing some processes and transactions at all.
    4. Workday configuration logic is different than PeopleSoft – will the solution still be applicable when we migrate? How much work would it cost to align?
    5. Where is Smart Forms solution nested? We already have a palette of self-service solutions available to different employee populations and those are not used to the extent they should. How is our solution going to be different?
    6. Inside Amazon (main employment at Amazon related resource) pages are not maintained and they are challenging to navigate in search of answers.
    7. Current processes and transactions are not fully mapped and some legacy policies need to be challenged (eg. approvals).
    8. Business rule changes frequently ( ex Approval changes). How will make our design cope up with this.
    9. In exceptional cases PeopleSoft does not have the required configuration and data attributes are stored offline by HRS teams. While heavily manual and error prone, it’s the only method of capturing some information.
    10. Cross country reporting when requester is in scope country and request if for out of scope country.
    11. If concerned employee is from a country which is not in a scope how would user experience be look like.
    12. DM team is also thinking about passive approval. But nothing concrete is out there. This will impact our design.

# Requirements

## Landing Page for Smart Form (TBD)

This requirement cover detail on how employee with different role and request will be reaching out for the smart form and what would be their starting point. (TBD)

## Validation process on routing to smart form.

Prior to landing on smart page (link that land employee on smart form). A validation need to be make sure that its active employee and is in scope of smart form and eligible to make a transaction at Smart form. Appendix F talk about indicative data and queries that can be used for this identification purpose.

## Validation After landing on and in process of executing transaction with in smart form

### Check that transaction is in scope

Validate requestor, concerning employee, relationship with the employee to make sure what kind of request be processed by the employee (Employee request (ESS), Manager Request (MSS), Generalist request (GSS)). So that a respective self-service can be directed.

### Check if concerned associate is active

To enter individual transactions, the concerned associate will be looked up in the system from the active workers list. Transactions can only be entered for associates who are on this list. For associates with both employee and contingent records, only the active record will be selected. Requestor can still raise a request but had to opt for ticketing route.

### Validation of fields

Smart form should able to validate data on the field and transaction[. Appendix G](#_Appendix_G_–) define field and data in field.

* Required vs optional field
* Valid value for field
* Length of field
* Effective dating
* Legitimate request
* Identified exception

### Identification of Self Service Vs ticketing for a request.

For initial wave scope. Smart form should able to direct all job and personal transaction that can be done through self-service to respective self-service. For those where employee cannot do a self-service employee is directed to raise a trouble ticket using either WFA API, Quick link or navigated assistance to use a pre-defined template or user friendly navigated instruction. [Appendix E](#_Appendix_E_–) is created for clarifying how a ticketing vs smart form navigation decision should be taken and what are the current existing exception there which stop a self-service to initiate or are pre requisite for running a particular transaction in self-service tool.

## Individual request

Individual request is a request which is made for a single person. It can be made by a manager, HRBP or any other type of employee (example recruiter) for self and for other.

Individual type interactive smart form should open whenever employee try to use this functionality.

Job and/or Personal data change must be selected on the form (i.e. cannot have an employee with transaction with neither Job nor Personal data change). If a Person is selected, at least one Personal or job change must be selected. The transaction details must be validated with the rules below (Types for Changes section), based on the transaction type(s) entered

## Mass update request

When a request is made for more than 1 person it is treated as mass update request, traditionally these request often come in excel files of different format. An interactive smart form should open up for this type of request where all individual rows for mass upload are either filled in by using an attachment from the user or user had option to key in input based on transaction elected.

We also require to validate data in excel file for data accuracy and enforcing right format. If there is no file, pop up an error message and do not allow the ticket to be submitted

If the file is in an unknown format, pop up an error message and do not allow requestor to move forward in request.

There is a length of file that can be generated out of smart form and be loaded in people Soft. Size is defined as 400 KB. If file is bigger than that then break request into smaller chunk and then load the file

Mass update request is further directed to ticketing system after generation of validated attachment from smart form. Which requester is required to be attached on a ticket before submitting? This request will further picked up by our existing RPA system fir initial phase and future RPA platform with next release.

## Safety Valve

At any time there would be safety valve depending on request for the requester inside a smart form. Which could generate a ticket out using quick link or WFA API depending upon type of request. Safety Valve should capture the reason within smart form on why requester need ot generate a ticket before generating the ticket. Reason can be stored and easily reportable if need to be. Reason can be any of the below (TBD )

* My request does not fall in any category
* Request is for someone who is not active employee
* Portal is not supporting my attachment for mass update
* It’s taking lot of time
* Other
  + - * If the user selects “Other”, display a mandatory free-text description field for them to summarize the reason. Limit this field to 50 characters. If “Other” is un-selected, remove and clear this field.

## List of transaction that need to be include in smart form

### All transaction should be included ideally, then we can just activate the one we had in scope for other we can have quick link to create a request. Please see list of all transaction in [Appendix G](#_Appendix_G_–)

## Data feed to Smart form (In progress, need to shape up more during system design review.)

This is an [Appendix E](#_Appendix_F_–)

## Smart form monitoring and performance (In progress will be working more on system design phase)

Something like alert matrix, this will be [Appendix H](#_Appendix_G_–)

## Taking Approval within Smart Form (In progress, need to shape up more during system design review.)

This is still need to be decided based on our approach we take in system design to see how it can be accommodate.

## Non Functional Requirements (In progress will be working more on system design phase)

* The application must be built in TBD (Ruby on Rails?)
* The application must be hosted on AWS
* The application must work in all modern browsers
* The application must be responsive (work well and look good on all screen sizes)
* The application must be able to support 10000 simultaneous users?
* Audit trail report is needed which will let us know what action are taken by bot ( Not for initial wave )
* Transaction report – give us summary of transaction done on Smart form ( user , role , login , action pages etc )
* Performance report – give us performance and response time of smart form.
* Operational report
* Custom report for ACES – ( TBD )
* Any kind of compliance or business custom report required by DM team (TBD )
* Dashboard for requestor where he can see his past request.

# Use Cases

# 

This is saved as a separate document in Discovery package. It can be located in a use case tab located here: [Use Cases](https://amazon.awsapps.com/workdocs/index.html#/folder/bdcfd9715084a75e60cc846dc151dce2409b4dc8a02266d473632f164b3d31be)

# Resources

*Insert links to policy documents and existing launch requirements. This could include internal policies, SOPs, external Labor Code, etc.*

|  |  |  |
| --- | --- | --- |
| **Content** | **Location** | **Business Owner** |
| *Main repository for HRSS team* | [*WorKDoc*](https://amazon.awsapps.com/workdocs/index.html#/login?redirectPath=folder%2F4df2d0f6d3b7e8e4ada804a6b8587875774f2fa82c24ef6f9199ae1ce4f306d2) | *HRSS* |
|  |  |  |
|  |  |  |
|  |  |  |

# Appendices

## Appendix A – Definitions/Acronyms

* **HRS** – [HR Services](https://inside.amazon.com/en/toolkits/hrtoolkit/hrservices/Pages/default.aspx)
* **DM** (Data Management) – ​The Data Management team ensures job and personal data in PeopleSoft is up-to-date. Data requests are processed by the India-based team. Data Management also supports businesses by catering to bulk changes emerging due to reorganizations or projects driven by the sites.
* **TTR** – Time to Resolve
* **PeopleSoft** – Amazon’s system of record for all employment-related data
  + Also known as “PeopleSoft,” “PSoft” or “PS” for short
  + Link: [https://PeopleSoft.hr.corp.amazon.com/](https://peopleportal.hr.corp.amazon.com/)
  + Schedule Query (and view results/modify queries):
    - PS portal path (UI):
      * Main Menu > Reporting Tools > Query > Schedule Query
  + Job Data – Job information for associates
    - PS portal path (UI):
      * Main Menu > Workforce Administration > Job Information > [Job Data](https://peopleportal.hr.corp.amazon.com/psp/HRSYSC3/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).JOB_DATA.GBL?FolderPath=PORTAL_ROOT_OBJECT.HC_WORKFORCE_ADMINISTRATION.HC_WORKFORCE_INFO.HC_JOB_DATA_GBL&IsFolder=false&IgnoreParamTempl=FolderPath%2cIsFolder)
    - Relevant data tables:
      * PS\_JOB
      * PS\_AZ\_PER\_BUS\_TTL
  + Personal Data – Personal information for associates
    - PS portal paths (UI):
      * Main Menu > Workforce Administration > Personal Information > [Modify a Person](https://peopleportal.hr.corp.amazon.com/psp/HRSYSC3/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).PERSONAL_DATA.GBL?FolderPath=PORTAL_ROOT_OBJECT.HC_WORKFORCE_ADMINISTRATION.CO_PERSONAL_INFORMATION.HC_UPDATE_PERSON&IsFolder=false&IgnoreParamTempl=FolderPath%2cIsFolder)
      * Main Menu > Workforce Administration > Personal Information > Personal Relationships > [Emergency Contact](https://peopleportal.hr.corp.amazon.com/psp/HRSYSC3/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).EMERGENCY_CONTACT.GBL?FolderPath=PORTAL_ROOT_OBJECT.HC_WORKFORCE_ADMINISTRATION.CO_PERSONAL_INFORMATION.HC_PERSONAL_RELATIONSHIP.HC_EMERGENCY_CONTACT_GBL4&IsFolder=false&IgnoreParamTempl=FolderPath%2cIsFolder)
    - Relevant data tables:
      * PS\_ADDRESSES
      * PS\_NAMES
      * PS\_EMAIL\_ADDRESSES
      * PS\_PERSONAL\_PHONE
      * PS\_EMERGENCY\_CNTCT
  + Effective Dates and Considerations for Job and Personal Data:
    - Future Dated –
      * Data updates are considered future dated if the effective date is on or after the maximum effective dated row for that employee on the relevant data table (see Job Data and Personal Data details above)
      * Employee data is considered future dated to the data update requested when the effective date of the change is earlier than the maximum effective dated row for that employee on the relevant data table
    - Correct History – Data updates require “Correct History” changes when there is a future dated row for that employee on the relevant data table
* **Ticketing** – Remedy ticketing is used by the ERC Data Management teams to receive and process associate data changes.
  + Link: <https://tt.amazon.com/>
  + User guide: <https://w.amazon.com/index.php/CTI_Self_Service/UserGuide>
  + CTI – Category, Type, Item
  + Quicklinks (a.k.a. QL) – Pre-populated ticket templates; reference: [USA DM quicklinks](https://inside.amazon.com/en/toolkits/HRToolkit/HRServices/Pages/Trouble-Ticket-Quicklinks.aspx#amz_section11)
  + Resolver Group or Assigned Group – Each team or workflow has its own Assigned Group in ticketing
  + Resolver Group Members:
    - Assigned Individual (Login or Alias) – Either a user login, or remedy email alias. Both of these entities have an email address (for regular emails) and a pager email address (for remedy pages).
    - Support Order – A number 0-99 specifying in what order group members should be contacted to resolve a ticket. When a Ticket is assigned to the resolver group, the member with the lowest support order is assigned the ticket.
    - Primary Queue – Each of the DM Assigned Groups has a primary queue alias in Support Order 1. This is the default assigned queue for any tickets which are new into their queue.
  + AR\_Escalator – The system user for Remedy ticketing
  + WFA API – the API account used to get data from
  + Flx-term – The WFA API account used by PeopleSoft to create and modify tickets
  + Automatic Worklog Notes – Some actions cause ticketing to automatically add a worklog on behalf of the user. In addition to the worklog note, the actions are also recorded on the Audit Trail. This includes but is not limited to the following actions:
    - Adding a login or group to the “People who can view this ticket” list: “Added Permission: ‘[Login/group]’”
    - Deleting a login or group from the “People who can view this ticket” list: “Deleting: ‘[Login/group]’”
* **RPA** – Robotics Process Automation
  + RPA tool – The tool used to manage and execute RPA
  + Bot – Automated account processing transactions
  + IVS (Input Validation Screen) – Form accessed through a web browser to process or review tickets
  + RPA Ticket Statuses – The following statuses will apply to tickets in the RPA tool (different than the ticket status in Remedy Ticketing)
    - Open / action still pending in RPA:
      * Tickets not yet reviewed (or mid-review):
        + Review Not Started
        + Review In Progress
      * Tickets missing approvals or information: (Phase 3)
        + Pending Information
      * Tickets reviewed and transaction(s) submitted but not yet processed in PS:
        + Queued for Processing
    - Resolved / no action left to take:
      * Tickets rejected from automation: (may have been partially processed)
        + Rejected – Reassigned
        + Rejected – Resolved
      * Tickets processed successfully:
        + Successful – Reassigned
        + Successful – Resolved
  + **Transactions** – Tickets may have no transaction, one transaction or several transactions. A transaction is defined as either a bulk upload file or data entry request(s) for a single associate. One transaction may include several updates in PeopleSoft (ex: Supervisor and Business Title)
  + Transaction Statuses:
    - New: default status for any transaction which is auto-populated but not reviewed
    - Rejected: transactions may be identified but rejected as out-of-scope for automation
    - Queued for Processing: ‘Submitted’ in RPA tool but PS upload not started yet
    - Uploaded to PS: transaction has been uploaded and is processing; not yet confirmed as successful or error from PS (when multiple uploads are required, transaction stays in this status until all uploads are complete)
    - Successful: PS upload complete, and 100% successful
    - Error: PS upload complete, and some or all updates errored
* **API (Application Programming Interface)** – Code that allows two software programs to communicate with each other. For RPA, APIs are used by the RPA tool / Bot to interact with PeopleSoft and Remedy Ticketing (Fluxo)
  + [Fluxo](https://w.amazon.com/index.php/Fluxo/UserGuide/API) – a RESTful web service for searching, updating and creating trouble tickets
  + PeopleAPI ([PAPI](https://w.amazon.com/index.php/HRIS/Charisma/Services/PAPI/FAQ)) – a RESTful service built using the ARest framework

## *Appendix B – Ticket and CTI details*

### This might not be needed for Smart Form 1.0 (TBD)

## *Appendix C – Discovery Package*

[WorkDocs](https://amazon.awsapps.com/workdocs/index.html#/folder/bdcfd9715084a75e60cc846dc151dce2409b4dc8a02266d473632f164b3d31be)

## *Appendix D – Self Service Availability ( In Progress for more research )*

Please go through the attached sheet. There is a tab in sheet by name “Definition” which will let you know more about component of this sheet and how to read that.



## *Appendix E – Data Input required for self service and ticketing decision.( In progress for more research )*

We may end up splitting Appendix tab further in this one, for now just refer Appendix D

## *Appendix F – Indicative data of employee and queries result. .( In progress need to refine Based on RPA need )*

Refresh details from the following PeopleSoft tables[[1]](#footnote-1) at the frequencies indicated, to be used for drop-down lists, search fields, validation, etc. throughout RPA. (

|  |  |  |  |
| --- | --- | --- | --- |
| Subject | Query Name | Fields | Frequency |
| All Active Associates[[2]](#footnote-2) - Job Data | RPA\_WORKER\_JOB\_DATA | * Employee ID * Login * Employee Record * EMP/CWR * Preferred Name * Preferred First Name * Preferred Middle Name * Preferred Last Name * Primary Name * Primary First Name * Primary Middle Name * Primary Last Name * HR Status (Active / Inactive) * Employee Status[[3]](#footnote-3) * Job Data Effective Date * Last Hire Date * Termination Date * Country * Regulatory Region * Business Unit * Company Code * Location Code * Department ID * FCLM Area * FCLM Job * Job Code * Supervisor ID * Shift Pattern * ADP Shift Differential * Reg/Temp (R/T) * Employee Class[[4]](#footnote-4) * Full/Part Time * Standard Hours * Pay Group * Employee Type (H/S) * Compensation Frequency (A/H) * HR Flag (Y/N) * Reports to Level 1 * Reports to Level 2 * Reports to Level 3 * Reports to Level 4 * Reports to Level 5 * Reports to Level 6 * Reports to Level 7 * Reports to Level 8 * Reports to Level 9 * Reports to Level 10 * Reports to Level 11 * Reports to Level 12 * Reports to Level 13 * Reports to Level 14 * Reports to Level 15 | Refresh the data every 2 hours[[5]](#footnote-5), starting the query at 12:30 AM Pacific Time (PT)[[6]](#footnote-6) and updating the RPA Tool data at ~1 AM PT |
| All Active Associates – Business Titles | RPA\_WORKER\_BUSINESS\_TITLES | * Employee ID * Employee Record * Business Title Effective Date * Business Title | Refresh the data every 2 hours, running the query at 12:30 AM PT and updating the RPA Tool data at ~4 AM PT |
| All Active Associates – Addresses | RPA\_WORKER\_ADDRESSES | * Employee ID * Address Type * Effective Date * Country * Postal * State * County * City * Address Line 1 * Address Line 2 * Address Line 3 * Address Line 4 * Num 1 * Num 2 * House Type * Address Field 1 * Address Field 2 * Address Field 3 | Refresh the data every 2 hours, running the query at 12:30 AM PT and updating the RPA Tool data at ~4 AM PT |
| All Active Associates – in Seasonal Jobs | RPA\_WORKER\_SEASONAL | * Employee ID * Effective Date (Start) | Refresh the data every 2 hours, running the query at 12:30 AM Pacific Time and updating the RPA Tool data at ~4 AM PT |
| All Active Associates – LOA Ramp Back | RPA\_WORKER\_LOA\_RAMPBACK | * Employee ID * Effective Date (Start) | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| Job Codes | RPA\_JOBCODE\_TBL | * Business Unit * Job Code * Job Title * Job Level * Job Family | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| Locations | RPA\_LOCATION\_TBL | * Location Code * Location Description * Short Description * Building * Ops Location Flag * CS Location Flag * Country * Postal * State * County * City * Address 1 * Address 2 * Address 3 * Address 4 * Nbr 1 * Nbr 2 * House * Address Field 1 * Address Field 2 * Address Field 3 * Compensation Range (STAND/PREM/DISC/WOOT) | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| Departments | RPA\_DEPT\_TBL | * Business Unit * Dept ID * Dept ID Description * Dept Org Level 1 * Dept Org Level 2 | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| Shift Patterns | RPA\_SHIFT\_PATTERN\_TBL | * Shift Pattern * Shift Pattern Description * Shift Pattern Short Description | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| ADP Shift | RPA\_SHIFT\_DIFF\_TBL | * Shift Differential Code * Shift Differential Amount * Allowed Country(/ies) | Refresh the data once per day, running the query at 3 AM PT and updating the RPA Tool data by ~4 AM PT |
| Countries | RPA\_COUNTRY\_TBL | * Country Code * Country Description | Ad hoc only |
| States | RPA\_STATE\_TBL | * Country Code * State Code * State Description | Ad hoc only |

The RPA Bot is responsible for auditing for errors on PeopleSoft queries and contacting HRSS upon errors, as needed. HRSS will also audit for errors on the queries during regular business hours.

## *Appendix G – Transaction Requirement and Validation rule.( In progress )*

Please go through the attached sheet. There is a tab in sheet by name “Definition” which will let you know more about component of this sheet and how to read that

**

*Appendix H– Performance and Alert Matrix.( In progress )*

This need to be worked up based on feedback from system design review. We will be leveraging below format and can update or add any more information on it.



*Appendix I– TT Quicklink ( In Progress )*

Please go through the attached sheet. There is a tab in sheet by name “Definition” which will let you know more about component of this sheet and how to read that. This sheet contain all current quick link used by Data management team.



*Appendix J– Countries in Scope.*

|  |  |  |
| --- | --- | --- |
| Region | Country | Description |
| Americas | ARG | Argentina ('ARG') |
| Americas | ARG | Argentina ('ARG') |
| Americas | BRA | Brazil ('BRA') |
| Americas | BRA | Brazil ('BRA') |
| Americas | CAN | Canada ('CAN') |
| Americas | CAN | Canada ('CAN') |
| Americas | CHL | Chile ('CHL') |
| Americas | CHL | Chile ('CHL') |
| Americas | COL or ROC | Colombia ('COL' or 'ROC') |
| Americas | COL or ROC | Colombia ('COL' or 'ROC') |
| Americas | CRI | Costa Rica ('CRI') |
| Americas | CRI | Costa Rica ('CRI') |
| Americas | Mexico | Mexico ('MEX') |
| Americas | Mexico | Mexico ('MEX') |
| Americas | USA | United States of America ('USA') |
| Americas | USA | United States of America ('USA') |
| APAC | AUS | Australia ('AUS') |
| APAC | AUS | Australia ('AUS') |
| APAC | IND | India ('IND') |
| APAC | IND | India ('IND') |
| APAC | IDN | Indonesia ('IDN') |
| APAC | IDN | Indonesia ('IDN') |
| APAC | MYS | Malaysia ('MYS') |
| APAC | MYS | Malaysia ('MYS') |
| APAC | NZL | New Zealand ('NZL') |
| APAC | NZL | New Zealand ('NZL') |
| APAC | SGP | Singapore ('SGP') |
| APAC | SGP | Singapore ('SGP') |
| APAC | THA | Thailand ('THA') |
| APAC | THA | Thailand ('THA') |
| APAC | VNM | Vietnam ('VNM') |
| APAC | VNM | Vietnam ('VNM') |
| EMEA | CZE | Czech Republic ('CZE') |
| EMEA | CZE | Czech Republic ('CZE') |
| EMEA | DNK | Denmark ('DNK') |
| EMEA | DNK | Denmark ('DNK') |
| EMEA | FIN | Finland ('FIN') |
| EMEA | FIN | Finland ('FIN') |
| EMEA | FRA | France ('FRA') |
| EMEA | FRA | France ('FRA') |
| EMEA | IRL or ROI | Ireland ('IRL' or 'ROI') |
| EMEA | IRL or ROI | Ireland ('IRL' or 'ROI') |
| EMEA | ISR | Israel ('ISR') |
| EMEA | ISR | Israel ('ISR') |
| EMEA | LUX | Luxembourg ('LUX') |
| EMEA | LUX | Luxembourg ('LUX') |
| EMEA | NLD | Netherlands ('NLD') |
| EMEA | NLD | Netherlands ('NLD') |
| EMEA | POL | Poland ('POL') – Job Data changes only (no Personal Data changes for associates in Poland) |
| EMEA | ROM | Romania ('ROM' or 'ROU') |
| EMEA | ROM | Romania ('ROM' or 'ROU') |
| EMEA | SVK | Slovakia ('SVK') |
| EMEA | SVK | Slovakia ('SVK') |
| EMEA | ZAF | South Africa ('ZAF') |
| EMEA | ZAF | South Africa ('ZAF') |
| EMEA | ESP | Spain ('ESP') |
| EMEA | ESP | Spain ('ESP') |
| EMEA | SWE | Sweden ('SWE') |
| EMEA | SWE | Sweden ('SWE') |
| EMEA | TUR | Turkey ('TUR') |
| EMEA | TUR | Turkey ('TUR') |
| EMEA | GBR or GBRSC | UK ('GBR' or 'GBRSC') |
| EMEA | GBR or GBRSC | UK ('GBR' or 'GBRSC') |

# Questions

*Track Open Questions to be resolved during the BRD review process here.*

|  |  |  |  |
| --- | --- | --- | --- |
| # | Question | Status | Date |
| 1 | For SM 1.0 , Will we use quick link or wfa API to write the ticket out of Smart form after validation when we identified that user is not able to make the change he is requesting through smart form | Open | 1/11 |
| 2 | For SM 1.0 , Will we use quick link or wfa API to write the ticket out of Smart form for escape Valve | Open | 1/11 |
| 3 | Identification of self-service criteria clearly from people soft side is becoming a challenge for People Tech as well. Initially requirement given by PT to us had multiple issues in it and send that back. Can we use an approach where we rely on pure research through table data and checking with use case | Open | 1/11 |

1. Vendor is extracting query results as .txt file, which has no size limitations (i.e. doesn’t cut off results like Excel). [↑](#footnote-ref-1)
2. Include all associates who are active in PS\_JOB as of Max Row OR within last 90 days of when the query is run (i.e. include future-hires & recent terminations) [↑](#footnote-ref-2)
3. Employee Status key: A = Active; D = Deceased; L = Leave of Absence; P = Leave With Pay; Q = Retired With Pay; R = Retired; S = Suspended; T = Terminated; U = Terminated With Pay; V = Terminated Pension Pay Out; W = Short Work Break; X = Retired-Pension Administration [↑](#footnote-ref-3)
4. Employee Class key: A = Apprentice; B = Fixed Term Contractor - EU; C = Third Party Consultant; F = Regular Full Time; H = Regular Part Time - 20 + Hours; I = Intern; J = JV/RC Worker; M = Internal Staffing Solutions; N = Trainee European; P = Apprentice; Q = Field Regular Part Time 20-29; R = Regular Reduced Time 30 + Hrs; S = Seasonal/Short-Term; T = Onsite Vendor; V = Offsite Vendor; W = 3P Onsite Worker; X = Regular Flex Time - < 20 Hrs [↑](#footnote-ref-4)
5. Recurrence Name (in PS Schedule Query) to schedule query to automatically run every 4 hours is “Every\_4\_Hours” [↑](#footnote-ref-5)
6. Query to run every 2 hours, on the half-hour, to be picked up on the hour by the Bot. [↑](#footnote-ref-6)