1. **Solution Name:**

Operational Process Automation – Reporting.

1. **Objective**:

Build a code based solution using Python or Excel Macros (**to be discussed**) to help automate the process of creating a report using two source files, i. e., Active Beneficiary Data and Open Process (Case) Data.

The approach needs to be decided.

1. **Client Name**:

Barnes and Thornburg, LLP

1. **In-Scope Processes:**
   * **Read Source Files** 
     + Active Beneficiary Data
     + Open Process Data
   * **Generate New Report**

Using the Active Beneficiary Data and Open Process Data, help generate a new report that contains the following tabs:

* + - Active Employees List
    - NIV Cases
    - PERM Cases
    - PR Cases
    - H-1B Cap Cases

1. **ETA for Delivery:**

By EOD Tuesday, May 10th.

1. **Requirements**

Client will upload the source files to a sub-folder listed below, in a designated location.

* Source Data Folder
* Processed Reports Folder

1. **Process Workflow**

**Step 1**: **Source File Generation**

Client will generate the source files listed below and place them in a designated location.

1. Active Beneficiary Data - Morningstar
2. Open Process Data - Morningstar

**Note:** See attached source files with test data.

**Step 2**: **Client Report Generation**

The client output report should contain the following tabs:

* **Active Employees List**
* **NIV Cases**
* **PERM Cases**
* **PR Cases**
* **H-1B Cap Cases**

**Report Output Conditions –**

**Overall:**

* Output File Name: Client Name Status Report\_mmddyyyy

**Note**: For the client name, use the name that is listed in source file.

* File Type: .XLSX
* Table Format - Blue, Table Style Medium 2
* Format Cells - Text Alignment
* Horizontal = Justify
* Vertical - Justify
* Font Type: Calibri (Body)
* Font Style: Regular
* Font Size: Header - 12; Rest - 11
* Column Width: 14
* Border: All Borders
* Freeze Pane: Cell B2
* Document Print Layout Setting
  + Orientation – Landscape
  + Paper Size: Legal (8.5” X 14”)
  + Sheet Setting:
    - Rows to repeat on top: $1:$1
    - Columns to repeat at left:

$A:$C (Active Employees tab)

$A:$E (NIV Cases, PERM Cases, PR Cases, and H-1B Cap Cases tabs)

* **Tab 1: Active Employees List**

**Source File:** *Active Beneficiary Data*

**Business Logic:**

1st Condition: "*All records in the “Active Beneficiary Data” Source File.*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

* **Tab 2: NIV Cases**

**Source File:** *Open Process Data*

**Business Logic:**

1st Condition: "*Process Type = H-1B Professional; L-1A Intracompany Transfer; L-1B Intracompany Transfer; E-3 Treaty Professional; L-1A/B Intracompany Transfer; TN Extension; H-4 Derivative; or*

*L Blanket”*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

* **Tab 3: PERM Cases**

**Source File:** *Open Process Data*

**Business Logic:**

1st Condition: "*Process Type = Labor Cert PERM”*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

* **Tab 4: PR Cases**

**Source File:** *Open Process Data*

**Business Logic:**

1st Condition: "*Process Type = I-140 LC Required; I-140 LC Exempt; AOS Employment”*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

* **Tab 5: H-1B Cap Cases**

**Source File:** *Open Process Data*

**Business Logic:**

1st Condition: "*Process Type = H-1B Cap”*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

* **Tab 6: Recently Approved Cases**

**Source File:** *Approved Process Data*

**Business Logic:**

1st Condition: "*Final Action Status = Approved; PERM Certified; or Granted”*

**Criteria for sorting records:**

1st Criteria: *Beneficiary Name*

**Note:** See attached sample output report “**Morningstar Monthly Status Report – Template**” for output fields list, and mapping to the corresponding field in the source file.

1. **Notes / Q&A**

**­**Test date for the two source files is included.

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