1. **Solution Name:**

Operational Process Automation – Reporting.

1. **Objective**:

Build a code based solution using Python and SQL to help automate the process of importing data, preparing reports, and delivering reports on/at scheduled days/times, to designated stakeholders.

1. **Client Name**:

Klasko Immigration Law Partners, LLP (KILP)

1. **In-Scope Processes:**
   * **Source Report Generation** 
     + Delivered by Case Management Vendor to a destination location (**to be provided by Client**)
     + The following files will be delivered by the Case Management Vendor:
       - beneficiary
       - process
   * **Data Import into SQL DB (GT Datawarehouse)**
     + beneficiary
     + process
   * **Scheduled Report Generation**
     + **Comcast Status Report**
   * **Scheduled Delivery** 
     + **Designated Stakeholders (via e-mail)**
     + **Destination Folder** (**to be provided by Client**)
2. **ETA for Delivery:**

By EOD Wednesday, July 27th. A report is due to the client on Friday, July 29th.

1. **Requirements**

Client will provide a destination folder with the sub-folders listed below.

* Source Data Folder
* Processed Reports Folder

1. **Process Workflow**

**Step 1**: **Data Import**

**To be discussed –**

1. **Backup of DB to be taken**
2. **Only delta changes to be imported and new records inserted**

**1. a.** Go to “**Source Data Folder**” and open the “**beneficiary”** report, and import the data into the SQL DB/Data Warehouse (already set up and mapping completed).

**1. b.** Then, open the “**process**” report, and import the data into the SQL DB/Data Warehouse (already set up and mapping completed).

**Data Import Conditions –**

* **Step 1:** Import “**Organization**” data from Tab 1 into the SQL DB (Organization Xref, Organization Name).
* **Step 2:** Import “**Petitioner**” data from Tab 1 into the SQL DB (Petitioner Xref, Petitioner Name) using the “**Organization Id (Xref)**” as the Foreign Key.
* **Step 3:** Import “**Beneficiary**” data from Tab 1 into the SQL DB using the “**Petitioner Xref**” as the Foreign Key.

**Notes:**

1. The Beneficiaries listed in this tab include both **ACTIVE and INACTIVE** Beneficiaries.
2. Import “**0100-01-01**” values as “**Null**”
3. If Organization Xref does not exist start with the Petitioner information.
4. Logic for importing Dependents’ data (already established).
   * 1. The “**primary\_beneficiary\_id**” will be blank for the “**Primary**” Beneficiary (beneficiary\_type). So, the following step would need to be completed first before importing the respective Dependent’s data:

Where “**beneficiary\_type = Primary**” populate the “**primary\_beneficiary\_id**” field with the Beneficiary’s “**beneficiary\_id**”.

* + 1. Then, link each Dependent to the Primary Beneficiary using the “**primary\_beneficiary\_id**”, and import the data accordingly.

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* **Step 4:** Import “**Process Data**” data from Tab 2 into the SQL DB using the “**Beneficiary Xref**” as the Foreign Key (already established).

**Notes:**

1. The Beneficiaries listed in this tab could include both **ACTIVE and RETIRED (INACTIVE)** Beneficiaries.
2. Import “**0100-01-01**” values as “**Null**”
3. Logic for importing Dependents’ data (already established).
   * 1. The “**primary\_beneficiary\_id**” will be blank for the “**Primary**” Beneficiary (beneficiary\_type). So, the following step would need to be completed first before importing the respective Dependent’s data:

Where “**beneficiary\_type = Primary**” populate the “**primary\_beneficiary\_id**” field with the Beneficiary’s “**beneficiary\_id**”.

* + 1. Then, link each Dependent to the Primary Beneficiary using the “**primary\_beneficiary\_id**”, and import the data accordingly.

* **Step 4:** Logic for updating “Petitioner of Primary Beneficiary”

1. The “**Petitioner\_of\_Primary\_Beneficiary**” will be blank for the “**Primary**” Beneficiary (beneficiary\_type). So, the following step would need to be completed first, before importing the data into the DB/DW:

Where “**beneficiary\_type = Primary**” populate the “**petitioner\_of\_primary\_beneficiary**” field with the Primary Beneficiary’s “**petitioner\_name**”.

* **Step 5**: **Report Generation**

**Standard Report Output Conditions –**

**Overall:**

* 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

The following report(s) have to be generated:

* + 1. **Comcast Status Report**

**Primary Condition**:Where “Petitioner of Primary Beneficiary = Comcast Cable Communications, LLC”

**Output Report Name:**

Comcast Status Report

* **Tab 1 Name:**

Active Beneficiary List

**Business Logic:**

Condition 1: "*Beneficiary Record Status* ***=*** *Active*"

**Criteria for sorting records:**

Criteria 1:

1. Beneficiary Type **=** Primary
2. Beneficiary Full Name

Criteria 2:

1. Beneficiary Type **=** Dependent
2. Beneficiary Full Name

**Report Output Fields:**

See attached sample report template “**Comcast Status Report Template”**

* **Tab 2 Name:**

Open Cases – Non-PERM

**Business Logic:**

Condition 1: "*Beneficiary Record Status* **=** *Active*"

Condition 2: "*Primary Case Status* **=** *Open*"

Condition 3: "*Case Type != Labor Cert PERM*"

**Criteria for sorting records:**

Criteria 1:

1. Beneficiary Type **=** Primary
2. Beneficiary Full Name

Criteria 2:

1. Beneficiary Type **=** Dependent
2. Beneficiary Full Name

**Report Output Fields:**

See attached sample report template **“Comcast Status Report Template”**

* **Tab 3 Name:**

Open Cases – PERM

**Business Logic:**

Condition 1: "*Beneficiary Record Status* **=** *Active*"

Condition 2: "*Primary Case Status* **=** *Open*"

Condition 3: "*Case Type = Labor Cert PERM*"

**Criteria for sorting records:**

Criteria 1:

1. Beneficiary Type **=** Primary
2. Beneficiary Full Name

Criteria 2:

1. Beneficiary Type **=** Dependent
2. Beneficiary Full Name

**Report Output Fields:**

See attached sample report template **“Comcast Status Report Template”**

* **Tab 4 Name:**

Document Expiration Report

**Business Logic:**

Condition 1: "*Beneficiary Record Status* **=** *Active*"

Condition 2: "*Any one of the fields listed below has an end date that falls within 7 months, i.e. starting from the 1st calendar day of the month in which the report is generated, including the month the report is generated (counted towards the 7 month period).*

Current Status Expiration

I-797 Expiration

I-94 Expiration

I-129S Expiration

PED Expiration

EAD Expiration

AP Expiration

DS 2019 Expiration

Re-Entry Expiration

Green Card Expiration

Passport Expiration Date

Visa Expiration Date

**Note**: Use the following cell highlight color scheme to indicate urgency

**Red**: Where the “**Document Expiration Date = Date within the calendar month in which the report is generated**”.

**Orange**: Where the “**Document Expiration Date = Date within calendar month immediately following the calendar month in which the report is generated”**.

**Light Yellow**: Where the “**Document Expiration Date != the above- mentioned conditions”.**

**Criteria for sorting records:**

Criteria 1:

1. Beneficiary Type = Primary
2. Beneficiary Full Name

Criteria 2:

1. Beneficiary Type = Dependent
2. Beneficiary Full Name

**Report Output Fields:**

See attached sample report template **“Comcast Status Report Template”**

1. **Notes / Q&A**

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