humley

**HM Revenue & Customs Starter
Checklist Automation Anywhere
Process and Humley Studio User Guide**

Version Control

Version	Author
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Solution Overview

Introduction

Humley's Employee Onboarding Assistant enables HR teams to quickly register new users through an easy-to-use Conversational Assistant.

Benefits

- Streamlined and improved employee onboarding experiences and satisfaction
- Improved compliance and data security
- Increased HR Team Productivity – average 30% time saving
- Rapid deployment and ROI – prebuilt intents and Conversational flows - ready to use or customise
- Deploy across multiple communication channels – Voice, Mobile (WhatsApp, SMS and bespoke applications) and Messenger (Facebook Workplace, Slack, MS Team and many more)

Experience Overview

The overall experience provided within this solution can be broken down into two key components, these include:

- HumleyNewStarterSkill
- Humley Studio Flow

HumleyNewStarterSkill

The HumleyNewStarterSkill allows employees to complete the HM Revenue & Custom Starter checklist using robotic process automation. This can be used to gather information about your new employee. You can use this information to help fill in your first Full Payment Submission (FPS) for this employee.

New Starter Checklist Flow using Humley Studio

Humley have created a platform that allows you to create next generation conversational assistants for enterprise. Taking all of the components that are required to build and deliver large enterprise solutions, while delivering it through a toolkit that can be used by the whole business.

When using the HumleyNewStarterSkill in combination with New Starter Checklist Flow Humley Studio and the relevant flow a user has the ability to complete the new starter checklist.
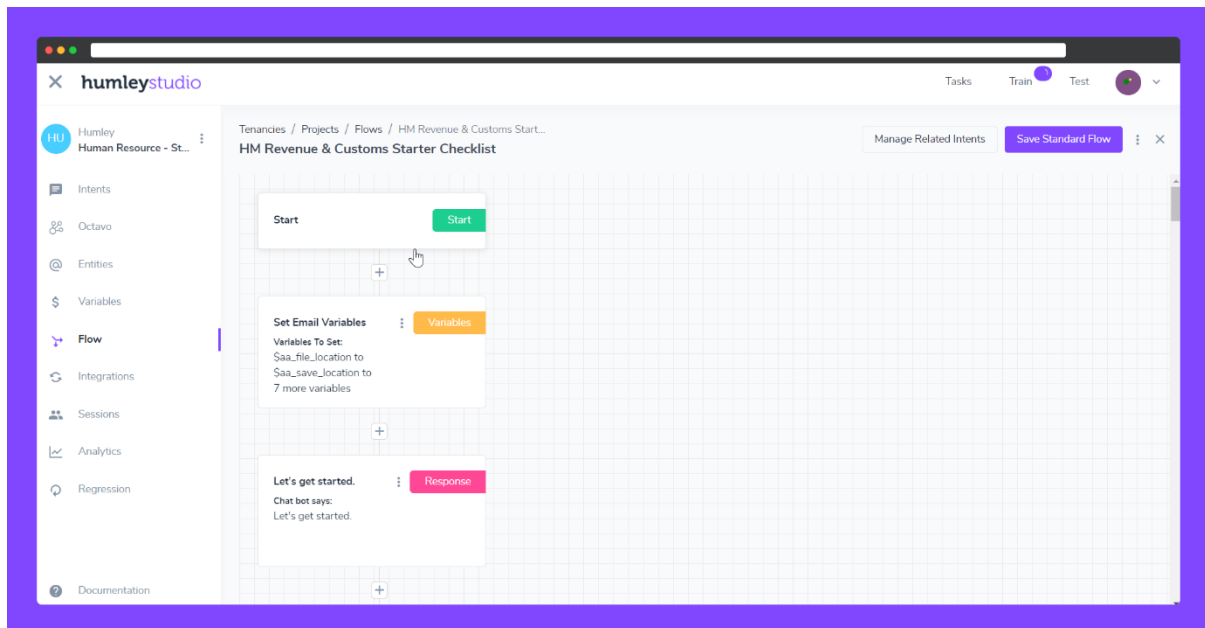
Process Overview

Introduction

The process uses MailJet Web API functionality and Adobe Reader to fill in a form and send it as an attachment to the desired user.

The user will supply the following data:

- Location of the file on the virtual machine.
- The data to be inputted into each part of the form.
- The saving details for the file i.e., the name and location of the file to be saved.
- The MailJet credentials and email address the saved form should be sent to.

Limitations

The following limitations should be understood before attempting to use these skills:

- The customer or partner is responsible for the availability of Adobe Reader and it being a default application for PDFs.

- The customer must use the form supplied; other forms will not work.
- With MailJet being an external service, there is always a possibility that MailJet's APIs will change. This is outside Automation Anywhere's control, and the skills will not be able to account for this, although new versions will be released soon after any changes where possible.

Pre-Requisites and Environment Configuration

- A MailJet account with credentials
- Adobe Reader V20.013
- Windows 10 Virtual Machine (Standard A8 v2 (8 vcpus, 16 GiB memory) (Automation Anywhere Control Room System Requirements))

Using HumleyNewStarterSkill

Input Parameters

These are the input parameters that the skill requires to be configured:

Parameters	Data Type	Description
firstname	Text	The first name of the employee.
surname	Text	The last name of the employee.
niNumber	Text	The national insurance number of the employee.
dob	Text	The date of birth of the employee.
gender	Int	1, if the gender of the employee is male, 2 if female
addressLine1	Text	The first line of the employee's address.
addressLine2	Text	The second line of the employee's address.
postcode	Text	The postcode of the employee's address.
country	Text	The country of the employee's address.
startDate	Text	The start date of the employee's employment.
question8	Text	The current job status of the employee. Will be A, B, or C.
loanType	Number	What type of plan does the employee? Will be 1 or 2.
repayingLoan	Flag	Is the employee repaying their loan by agreed monthly payments
loanNotRepaid	Flag	Is the student loan fully repaid

studyEndLastApril	Flag	Did the studies finish before the last 6th April?
pdfOutputFolderPath	Text	Location on the Virtual Machine where the form will be saved.
pdfFilePath	Text	Location of the PDF form on the Virtual Machine.
senderName	Text	The name of the person sending the email
senderEmail	Text	The email address of the person sending the email
recipientName	Text	The name of the person receiving the email
recipientEmail	Text	The email address of the person receiving the email
emailBodyHtml	Text	The Body text of the email
mailjetKey	Text	The username credential supplied by MailJet
mailjetSecret	Text	The password credential supplied by MailJet

Output Parameters

The skill does not supply output parameters.

Resources

The New Starter Checklist PDF is required for the bot to run successfully (download available at http://resources.humley.com/automation-anywhere/NewStarterChecklist.pdf). The form should be saved to a location on the virtual machine accessible by the Automation Anywhere users running the bots.

Support

Support for these skills is provided by Humley on a best endeavours basis and is not subject to formal SLAs. Formal SLAs are provided under paid plans under Humley Studio.

The preferred channel of support is as follows:

 E-mail: support@humley.com

Function Tests

No specific tests are provided with these skills, and no universal test instance is available to make dummy calls to; it is expected that users will use appropriate tests in their own environments to validate that the skills are behaving as expected.

Troubleshooting Guidelines

There are no known commonly encountered issues at this stage, or corresponding resolutions for them. If users begin encountering issues, then this section will be updated with known resolutions.

Humley Studio

Introduction

Humley have created a platform that allows you to create next generation conversational assistants for enterprise. Taking all of the components that are required to build and deliver large enterprise solutions, while delivering it through a toolkit that can be used by the whole business.

Humley Studio takes a number of AI and data analytics technologies from a number of the world's top AI providers and orchestrates them together to make exciting and powerful Conversational Assistants possible.

Accessing Humley Studio

To gain access you'll need to contact Humley to get your account setup, we offer a 30-day free trial for all customers who want to get started with Humley Studio. You can do this by contacting richard.trigg@humley.com

Connecting HumleyNewStarterSkill to Humley Studio

Creating a new project using Recipes

1. Enter Humley Studio and create new project.

Every conversational assistant created within Humley Studio starts within a new project, to get started we're going to create a new project by select create new project shown in the top right of the page below.
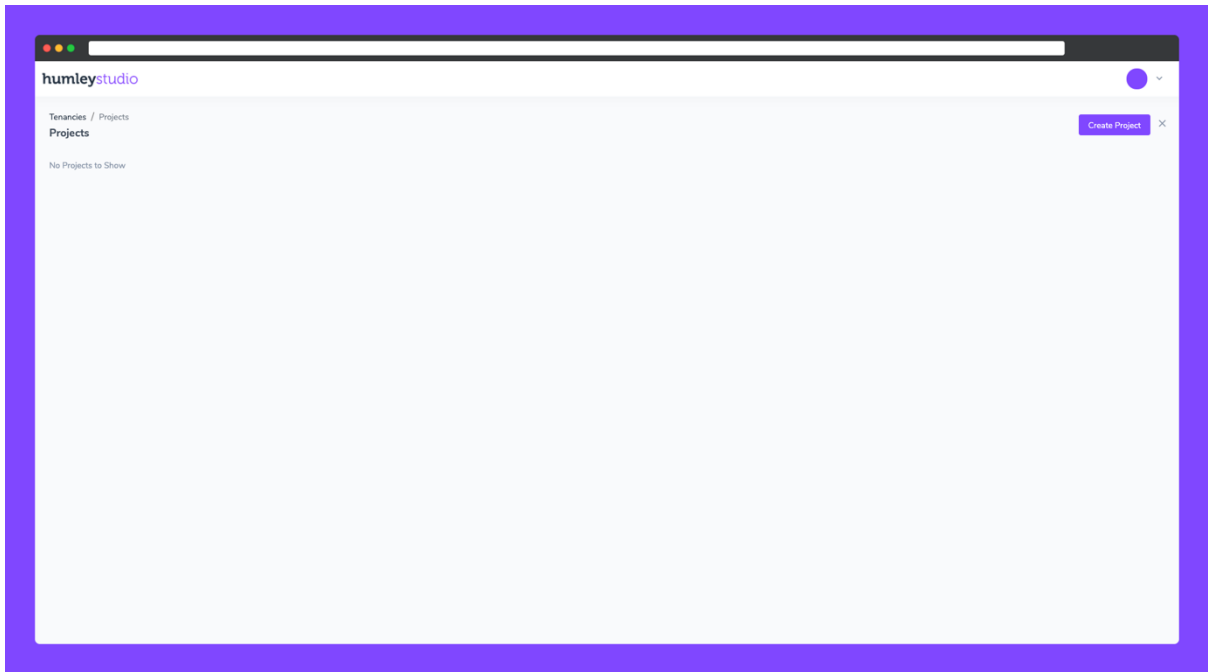
2. Select Recipes

In order to get create our new project we're going to use recipes in order to get started with a pre-built use case and have our new starter checklist user journey available to use out of the box. To do this, we'll select recipes on the screen below.
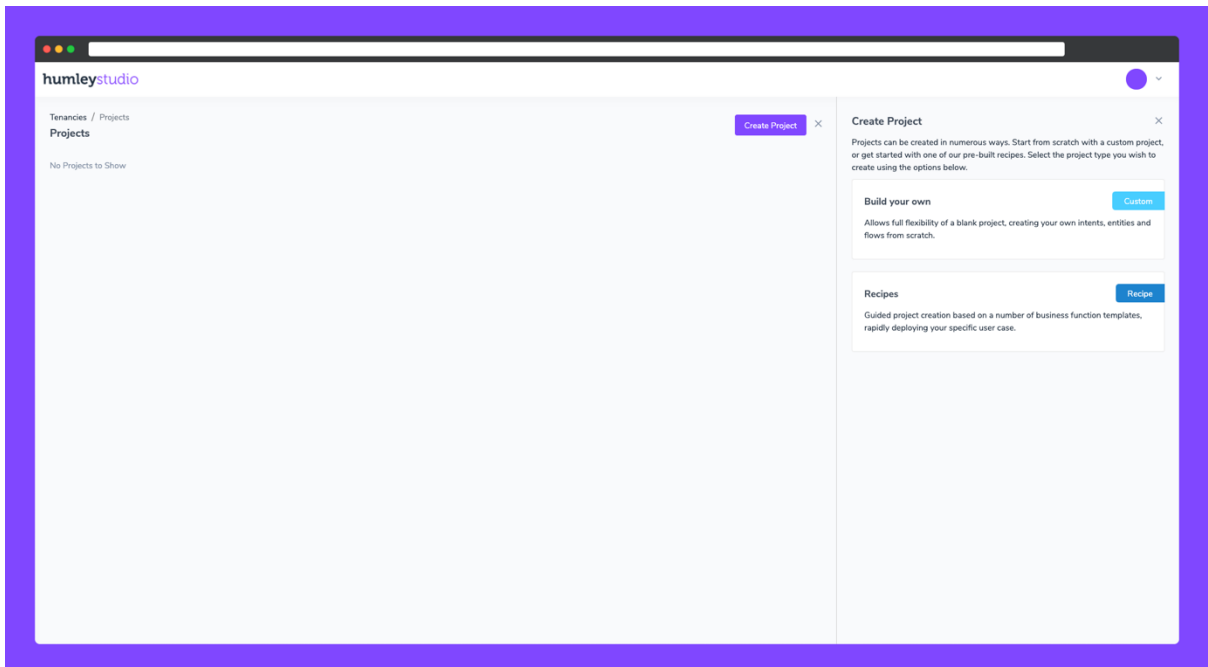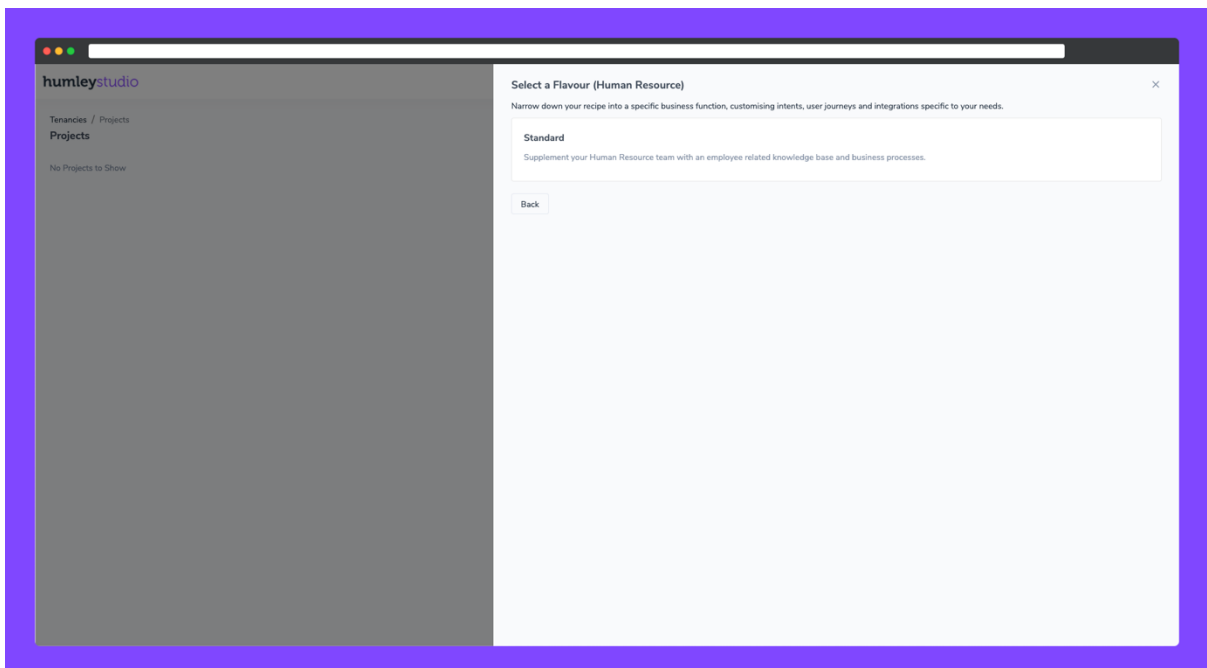
3. Select Human Resources

Once we've selected recipes, we'll be presented with a screen that allows us to select from the different recipes that are currently available within Humley Studio. Select "Human Resource" from the list shown below.
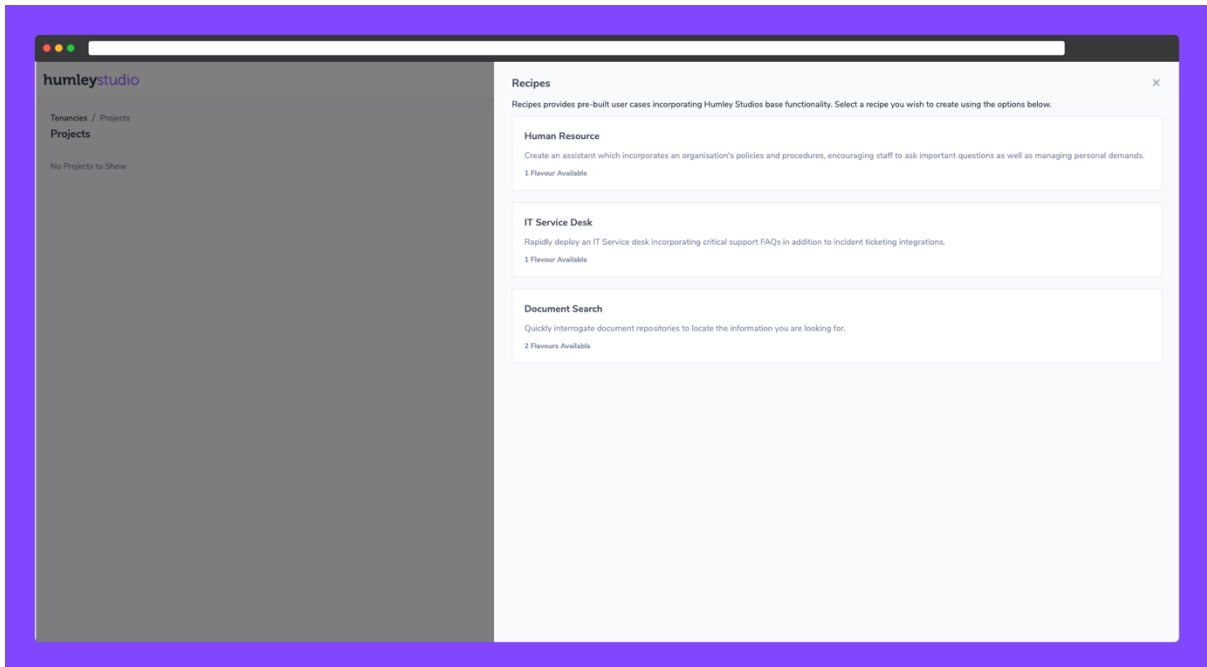

4. Select Standard

Once we've selected Human Resource, we can select "Standard" from the list shown below.

5. Select Intents

After selecting "Standard" we'll then be presented with the option to select the intents we'd like to have available within our new project. Intents provide our assistant with a selection of different questions and answers our assistant we'll be able to answer. Using the list shown below select the intents you'd like to have available within your assistant, once you've selected your intents, select "Next".
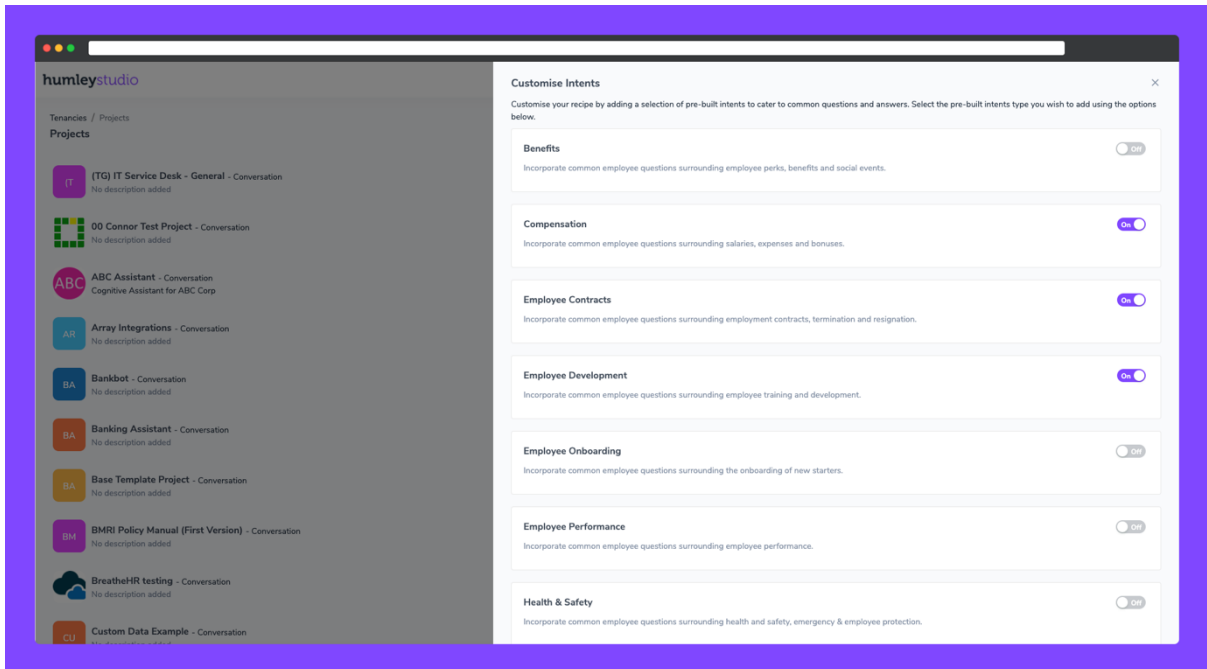
6. Select H&M Revenue and Customs new starter checklist

Following the selection of the intents that you would like available within your project; you now have the ability to select the "User Journeys" you would like available. For the purpose of this guide, please deselect all user journeys accept from the "HM Revenue & Customs Starter Checklist" as shown below. When you're done, please select "Next".
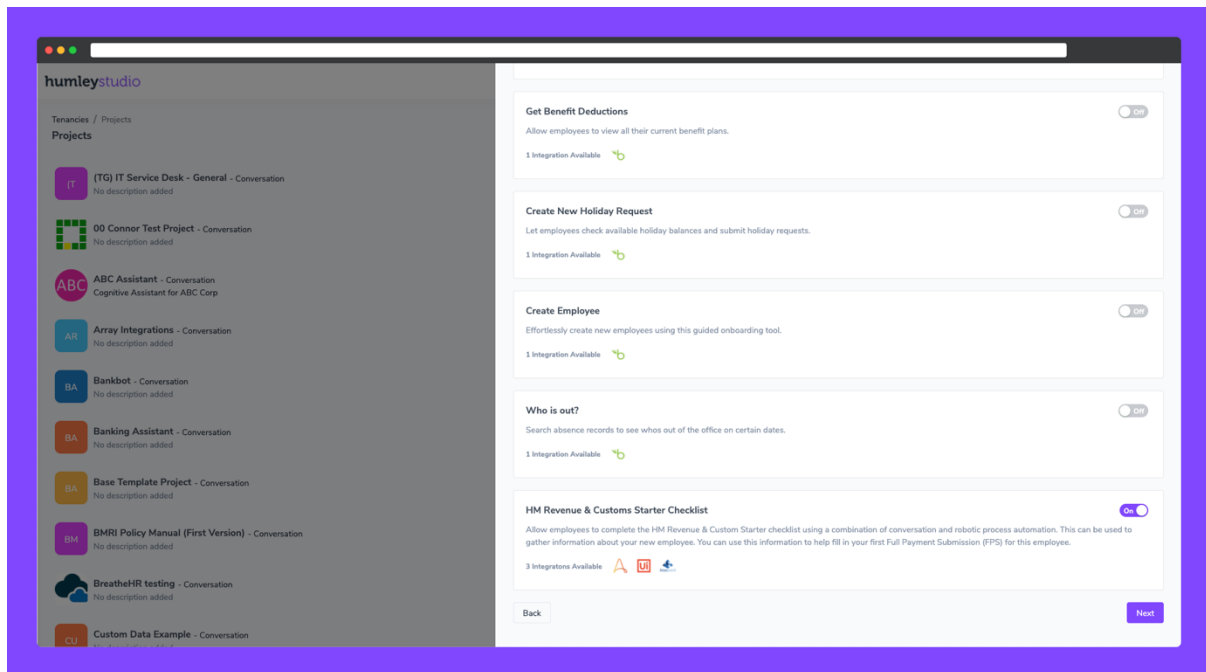
7. Customise H&M Revenue and Customs new starter checklist

Select the option to customise the "H&M Revenue and Customs new starter checklist option to customise your RPA provider.

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Tenancies / Projects

Projects

(TG) IT Service Desk - General - Conversation
No description added

00 Connor Test Project - Conversation
No description added

ABC Assistant - Conversation
Cognitive Assistant for ABC Corp

Array Integrations - Conversation
No description added

Bankbot - Conversation
No description added

Banking Assistant - Conversation
No description added

Base Template Project - Conversation
No description added

BMRI Policy Manual (First Version) - Conversation
No description added

BreatheHR testing - Conversation
No description added

Customising Your Recipe   ×

Enable pre-built user journeys and action them with a selection of third party integrations.

Customise New Starter Automated Process for HM Revenue & Customs Starter Checklist

Integrations that will manage employees

○ To Do

Back   Next

8. Select "Automation Anywhere (A2019)" as integration provider

Using the options provided below, select "Automation Anywhere (A2019)"
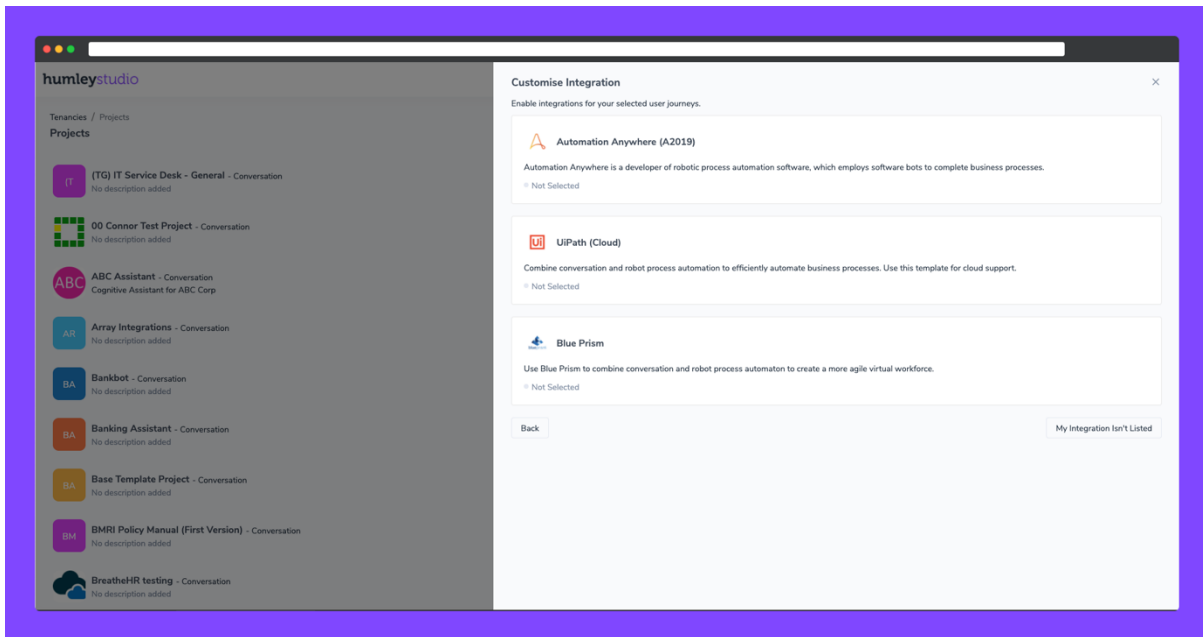
9. Configure "Automation Anywhere (A2019)" with your automation Anywhere Control Room Details

Using the configuration page, configure the name of your integration as "Automation Anywhere (A2019)" and then fill out the fields with the relevant details of your Automation Anywhere account.
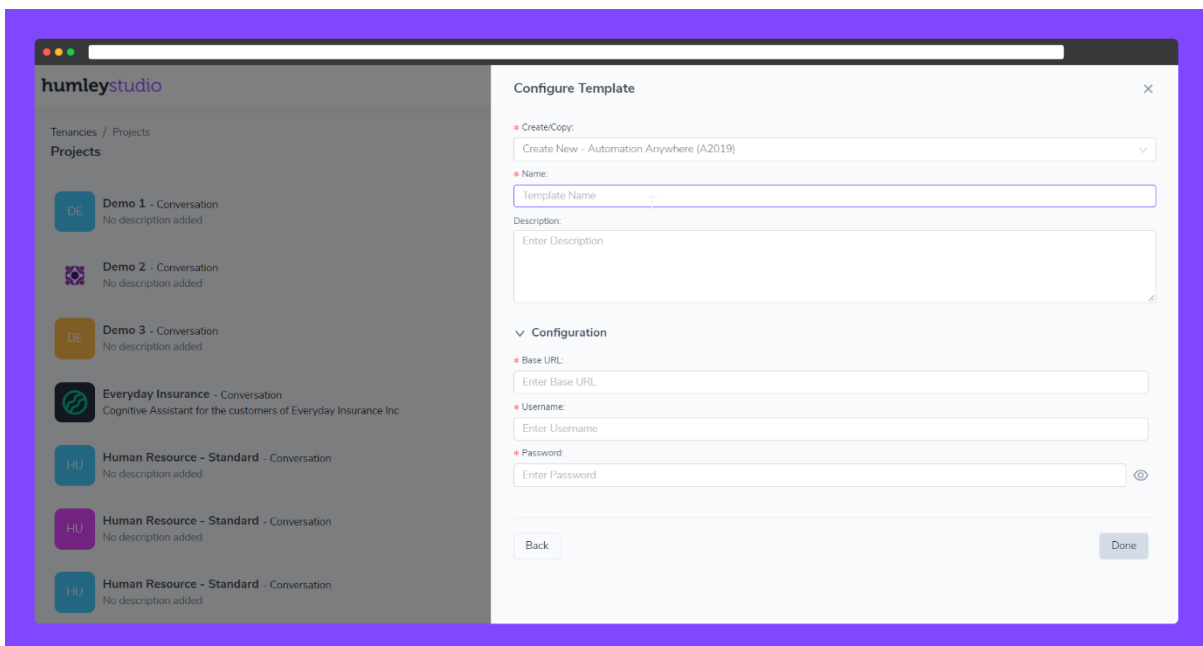
10. Review Recipe Information & Submit

Review the items that make up your newly created recipe and click "Next" to start the creation of recipe.
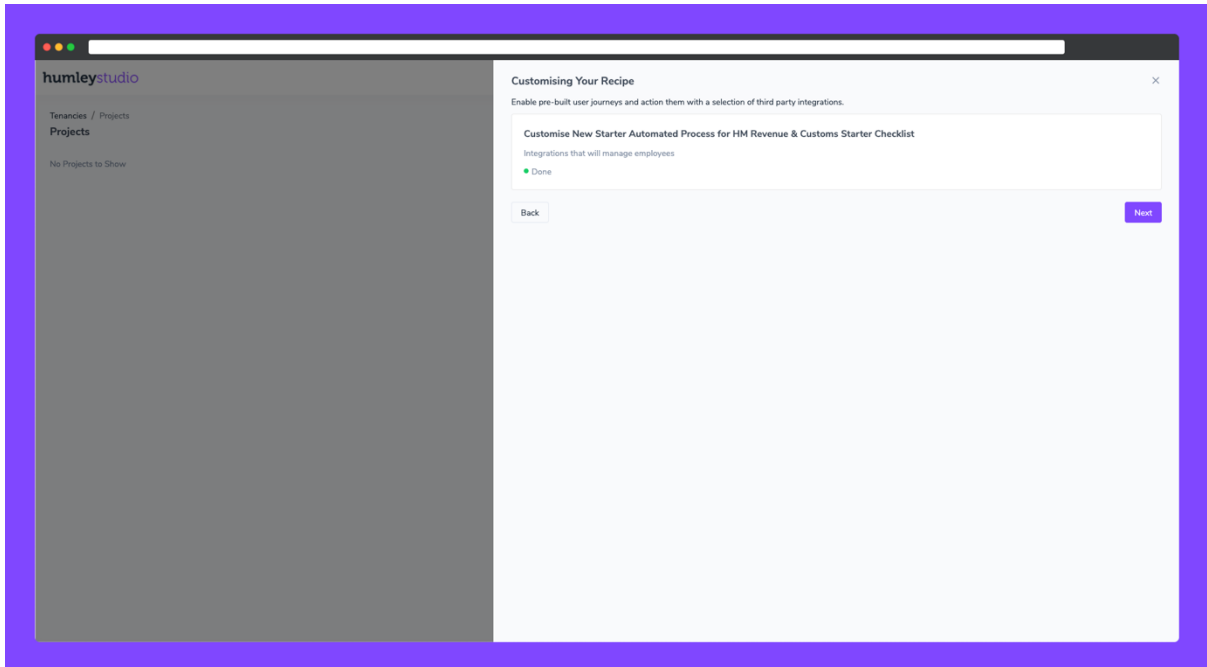
11. View Newly Created Project

Once your recipe has been created you can view your newly created project by select "View Project" as shown in the image below.
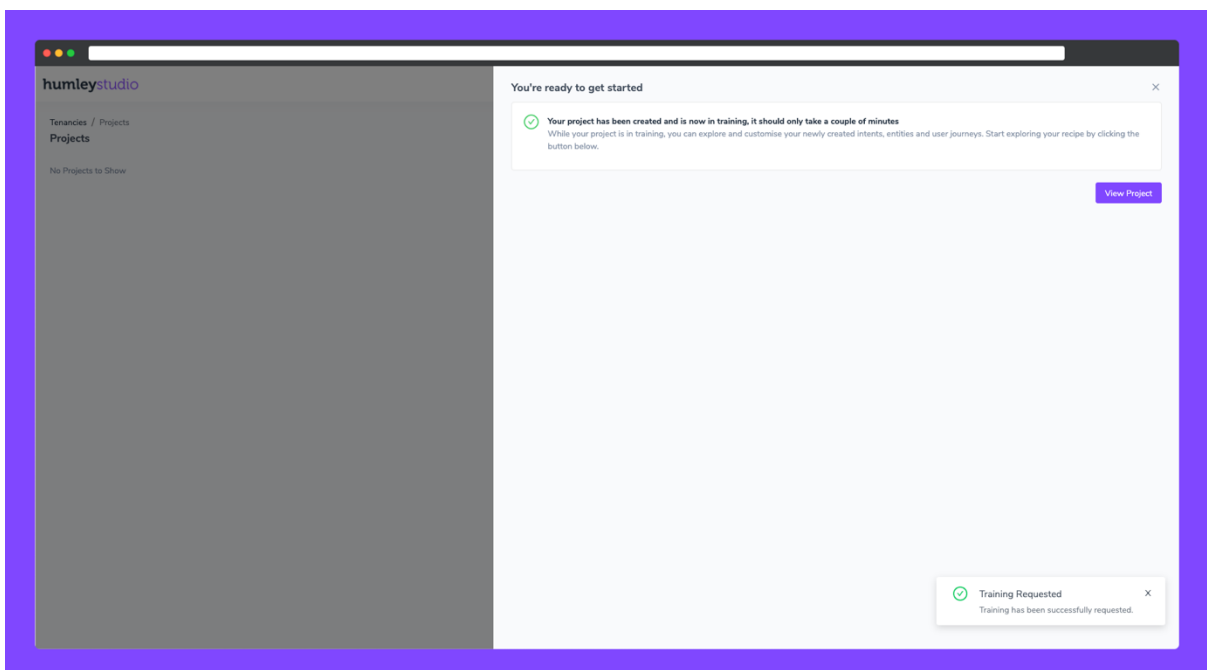
Configuring Automation Anywhere Integrations with New Starter Checklist Journey

1. Enter intents page & select New Starter Checklist Intent

When you first enter your newly created project the first page, you'll be shown is intents page, within the intents page you'll see all of the intents that you chose during your recipe set up.
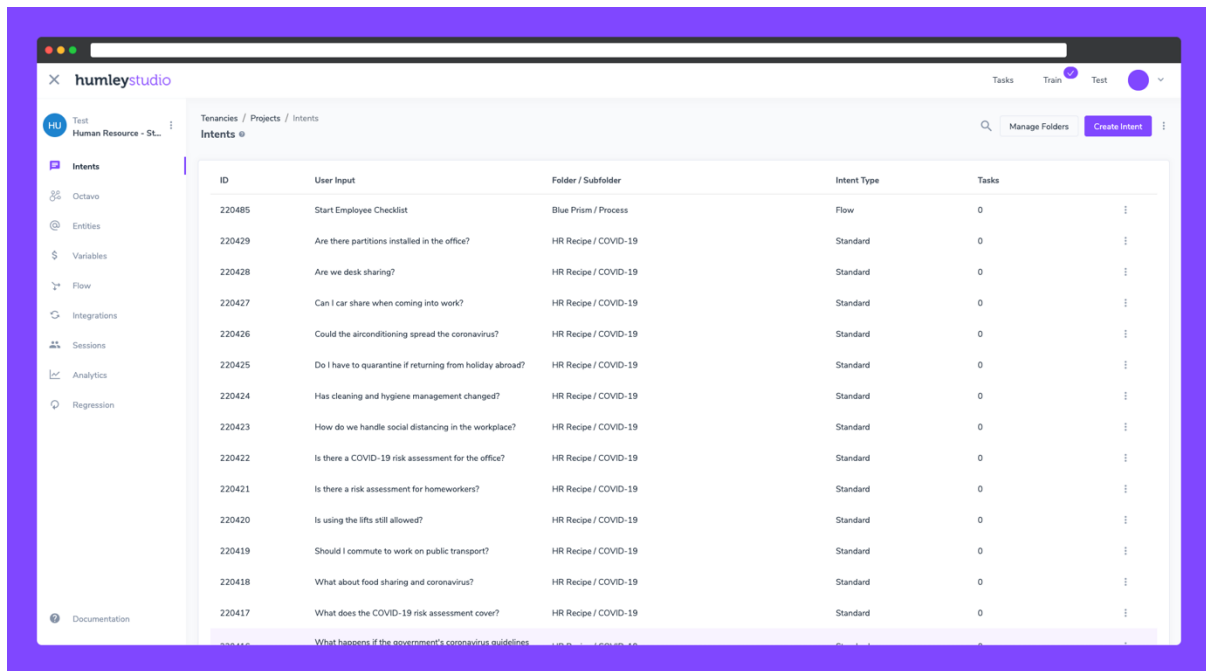
2. View Intent & Enter Flow Editor

After select the "Start employee checklist" intent, you'll be navigated to the intent editor, within the intent editor you'll be presented with various configuration options related to the intent. Scroll down the response select where it states that intent is configured against the "HM Revenue & Custom Checklist" Flow.
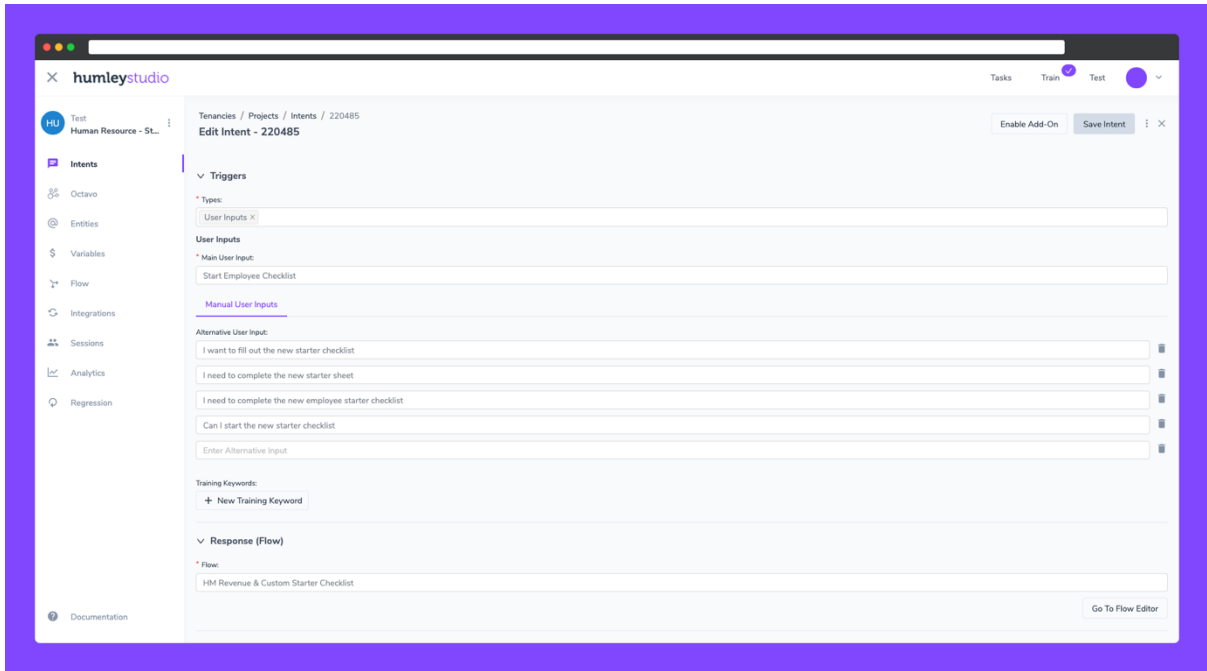
3. Select the option to "Go to the flow editor" as shown to the bottom right of the flow selection dropdown.
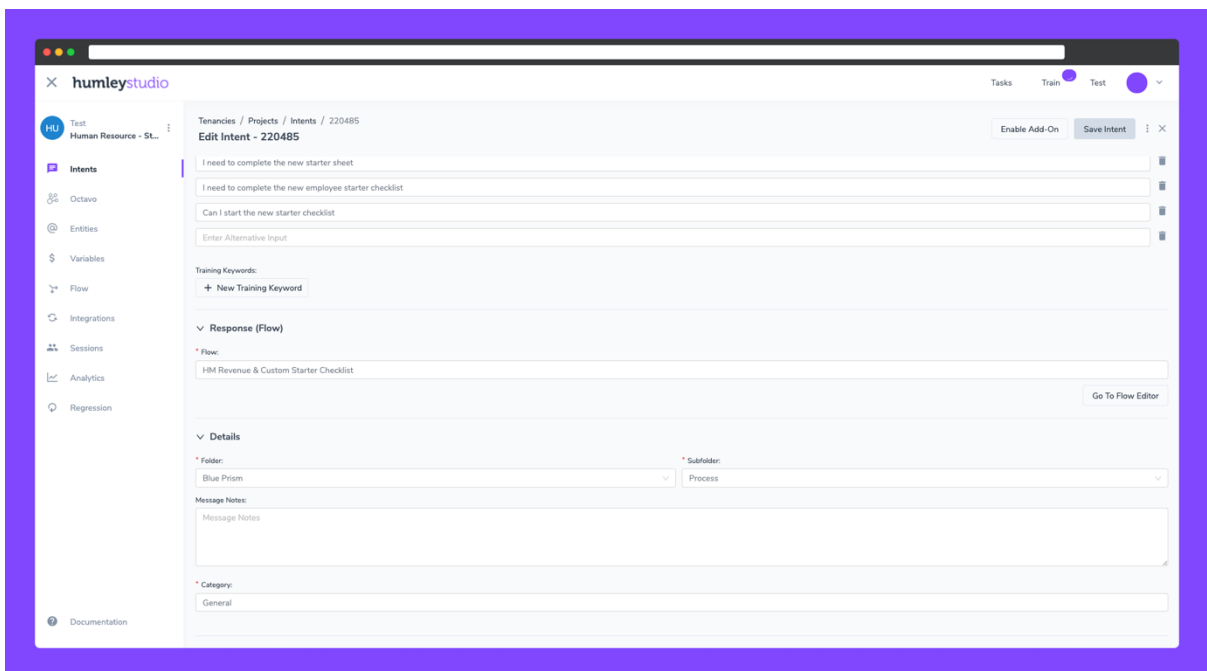
4. Review Flow for New Starter Checklist

Once you've navigated to the flow editor, you'll be shown a number of different cards that represent the modules that make up the HM Revenue & Customs New Starter Checklist. Take a moment to review the flow and families yourself with the different modules that make up the experience.
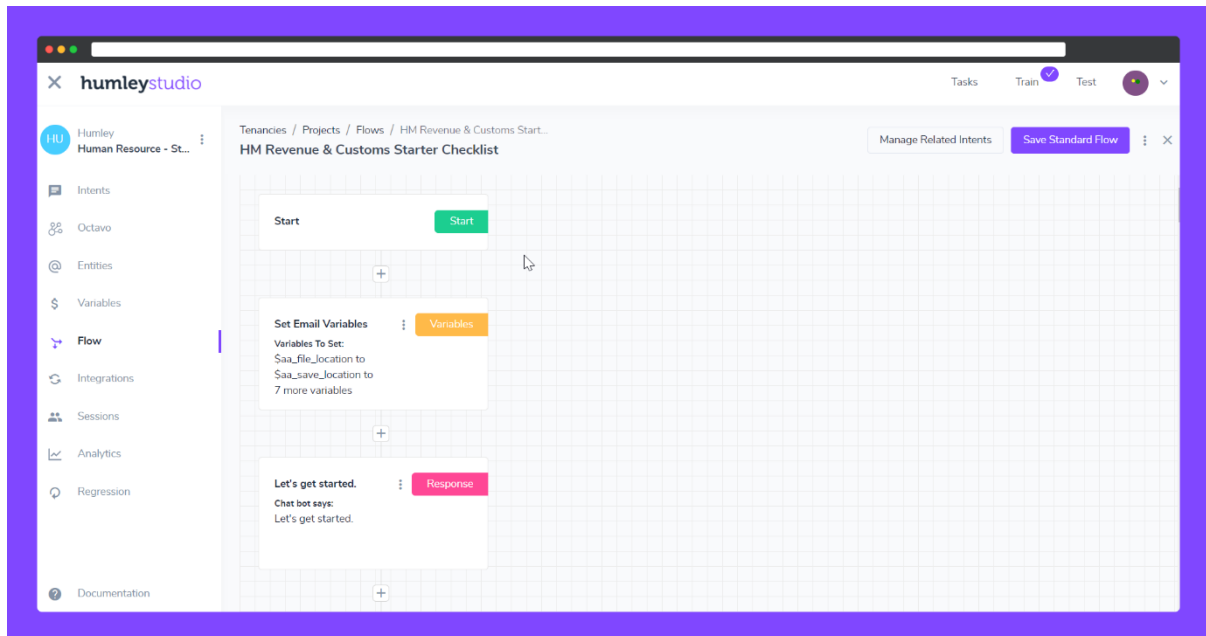
5. Select & Configure Set Variables Module

Once you've taken a look around the flow, the first item we need to configure is the "Set Variables" module called "Set Process Variables" as shown below. Select the module by selecting the card shown, upon selection you'll shown the side panel as seen below.
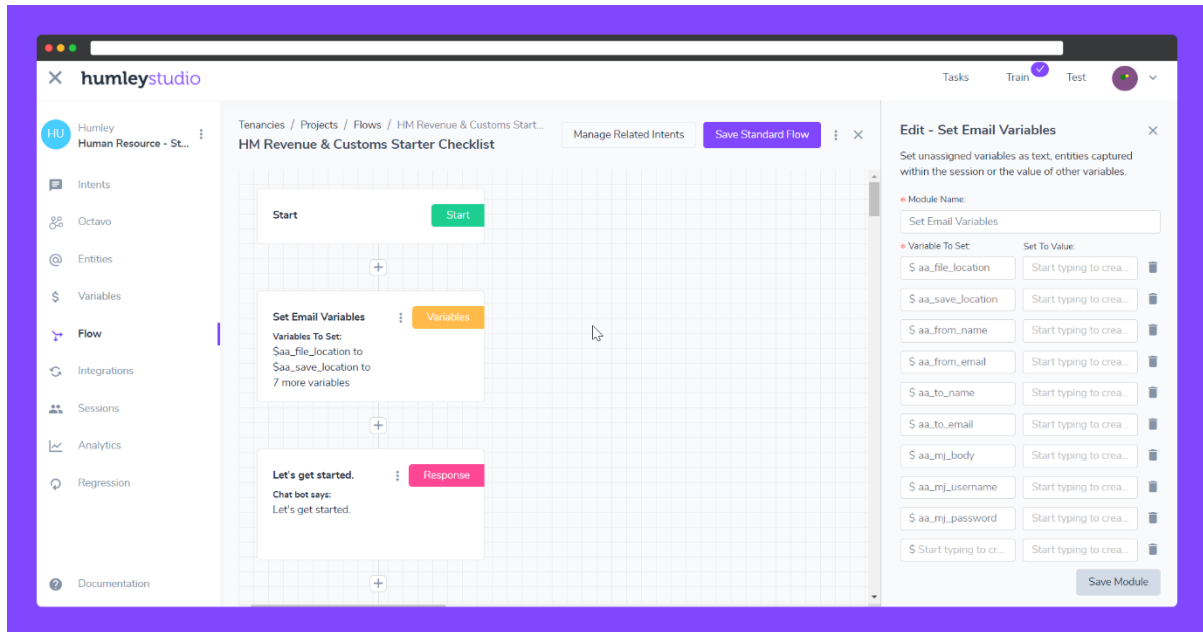
In order to configure the module variables within this module, please see table below for additional guidance.

Humley Studio Variable	Description	Example Value
aa_save_location	The location on the Virtual Machine where the form will be saved	C:\Users\HumleyExample\Documents\UiPathStarter\
aa_file_location	The location of the blank pdf on the Virtual Machine	C:\Users\HumleyExample\Documents\UiPathStarter\Newstartercklist.pdf
aa_from_name	The name of the person sending the email	Humley
aa_from_email	The email address of the person sending the email	webmaster@humley.com
aa_to_name	The name of the email recipient	Recipient
aa_to_email	The email address of the recipient	tobias.gooney@humley.com

aa_mj_body	The Body text of the email	Please find your new starter checklist
aa_mj_username	The username credential supplied by MailJet	cc5175889a6e9e68295d24535928e0cf
aa_mj_password	The password credential supplied by MailJet	22ce6423cdb168df4fbad5b1806c576e

6. Select the Automation Anywhere Integration Module

Scroll to the bottom of the flow and select the Automation Anywhere Integration Module, which will open the Integration Configuration Panel
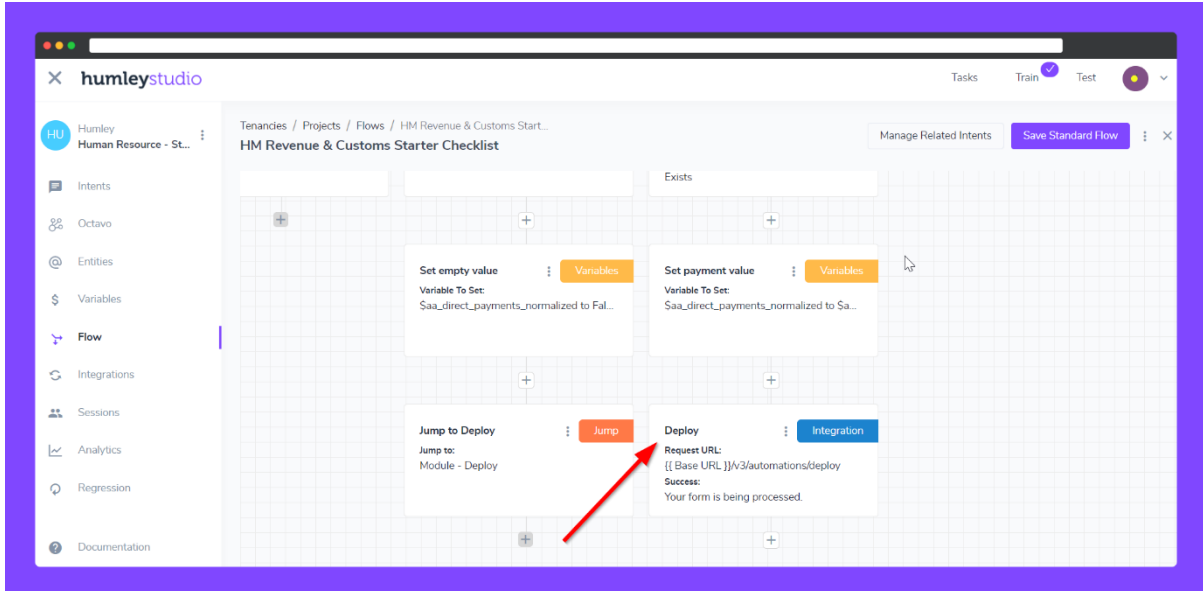
7. Fill out Automation Anywhere details in the module

In the integration module panel, you will need to enter the values relevant to the bot that was created on your control room using the supplied export. The minimum details required to trigger the bot is Body_fileId, Body_runAsUserIds, Body_overrideDefaultDevice and Body_botInput. Body_botInput are already set up for you to allow Humley variables to be passed into the bot, and Body_overrideDefaultDevice will be set to false by default. Body_fileId (FileId in request body) and Body_runAsUserIds (runAsUserIds in request body) can be found by visiting your Automation Anywhere Control Room.
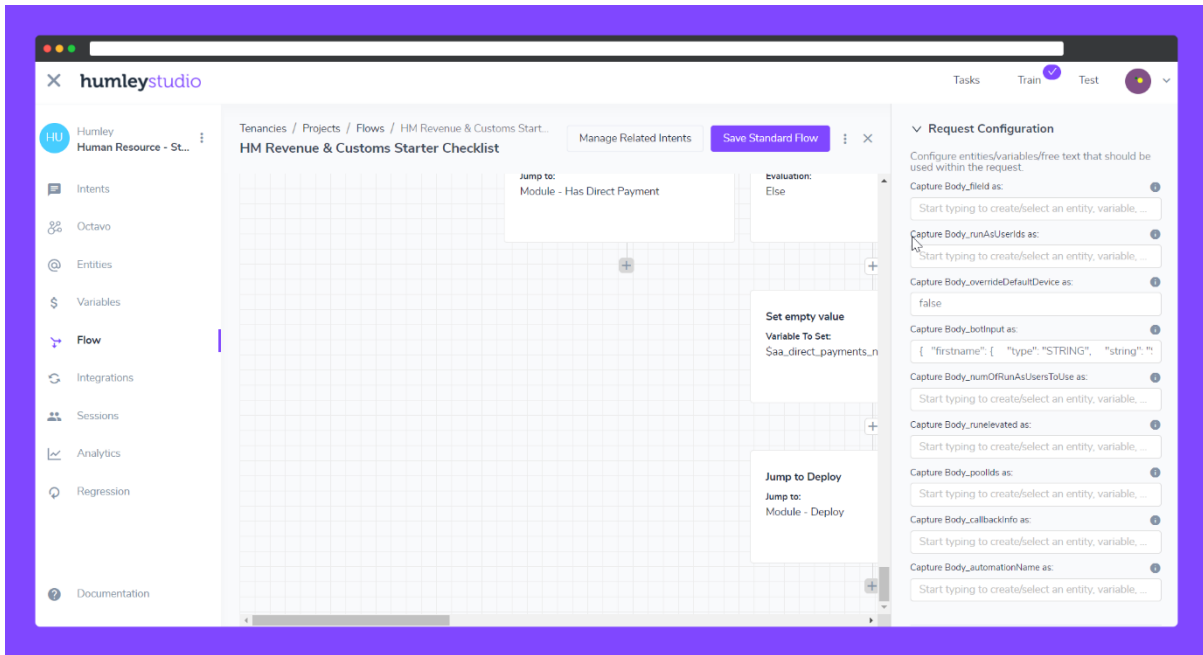
The table below provides you with the variables that are used to configure your request information, these variables have been automatically created upon addition of the recipe to your project, as well as added to the botInput string of the Automation Anywhere Integration.

Process Input Parameter	Humley Studio Variable
firstname	aa_first_name
surname	aa_last_name
niNumber	aa_national_insurance_normalized
dob	aa_dob
gender	aa_normalized_gender
addressLine1	aa_first_line
addressLine2	aa_second_line
postcode	aa_postcode
country	aa_country
startDate	aa_employment_start_date
question8	aa_statements
loanType	aa_plan_type_normalized
repayingLoan	aa_direct_payment_normalized
loanNotRepaid	aa_student_loan_choice
studyEndLastApril	aa_study_finish_choice
pdfOutputFolderPath	aa_file_location
pdfFilePath	aa_file_name
senderName	aa_from_name
senderEmail	aa_from_email
recipientName	aa_to_name
recipientEmail	aa_to_email

emailBodyHtml	aa_mj_body
mailjetKey	aa_mj_username
mailjetSecret	aa_mj_password

8. Save Flow

Once you've completed the adjustments, save the flow by selecting the save flow option as shown at the top right of the page. Upon save you will be navigated to the flow overview page.
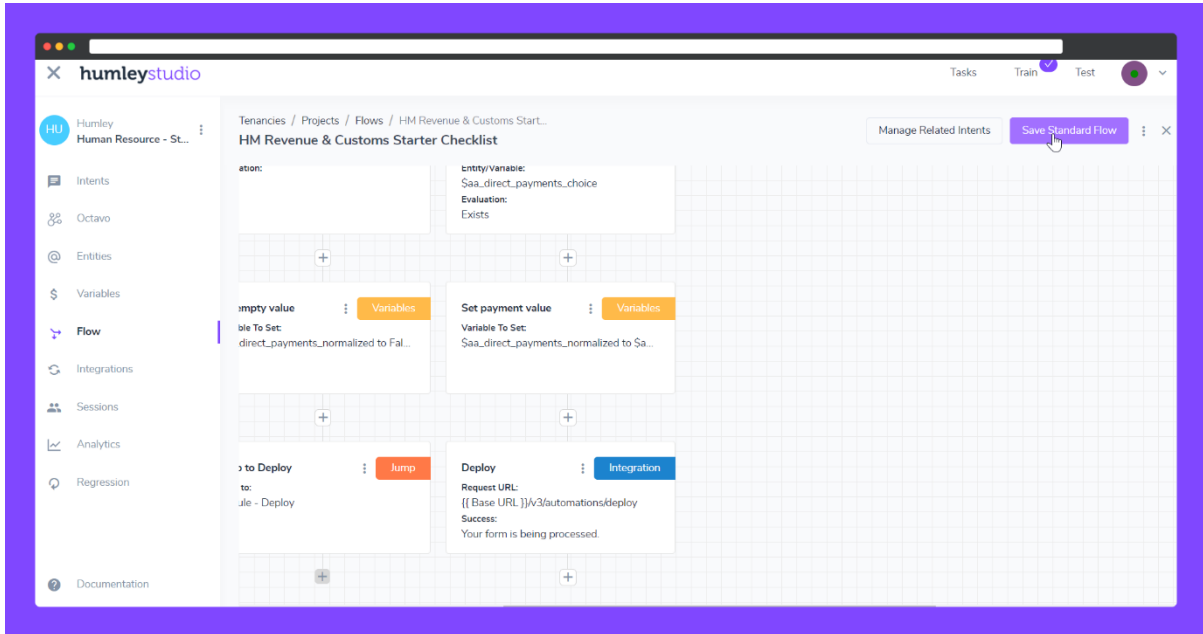
Testing End to End Experience

1. Launch Test Experience

In order to test you're newly configured "HM and Revenue & Customs" experience we can launch a test experience directly from Humley Studio, to do this you can select shown in the top bar anywhere within the tooling. Upon launch it should look like the below.
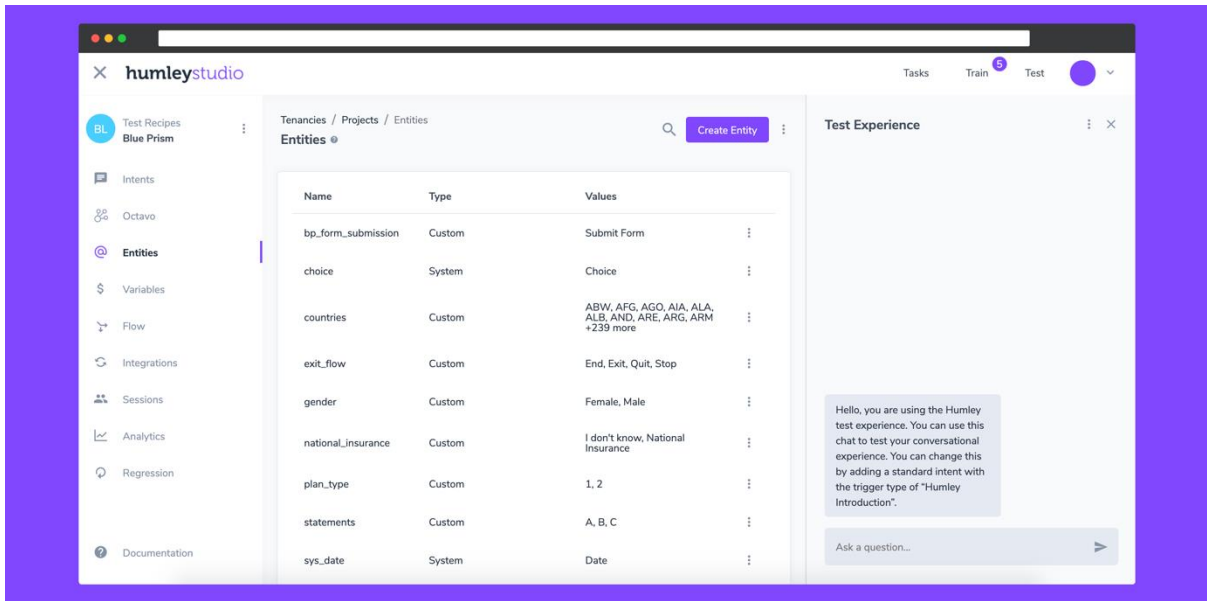
2. Trigger New Starter Checklist Intent

Within the text experience in the chat input field, enter "Start Employee Checklist".

3. Navigating the flow

Once you've triggered the experience, you can use the table below to get an understanding surrounding the variations of input throughout the new starter checklist combined with a brief description of their setup via Humley Studio.

Gather Prompt Text	Entity/Variable Name	Validation Description
What is your first name?	aa_first_name	Unassigned Variable – Allows a user to enter any input
What is your last name?	aa_last_name	Unassigned Variable – Allows a user to enter any input
What is your national insurance number?	aa_national_insurance	@national_insurance
Are you male or female?	aa_ gender	@gender – Allows a user to enter either "Male" or "Female"
What is the first line of your address?	aa_first_line	Unassigned Variable – Allows a user to enter any input

What is the second line of your address?	aa_second_line	Unassigned Variable – Allows a user to enter any input
What is your postcode?	aa_postcode	@postcode – Allows for capture of any valid UK postcode
Which country are you located?	aa_country	@country – Allows a user to enter any country using country name or ISO-3 format.
What is the start date of your employment?	aa_employment_start_date	@sys_date – Allows a user to specify past a present date in standard date formats as well as natural language (22/12/2020/22nd December 2020, Yesterday)
Which of the following statements is correct? etc...	aa_statements	@statements – Allows a user to enter A or B
What type of Student Loan do you have?	aa_plan_type	@plan_type – Allows a user to enter either 1 or 2
Are you repaying your Student Loan direct to the Student Loans Company by agreed monthly payments?	aa_direct_payment	@choice – Allows a user to specify a positive (Yes, Yeah) or negative (No, nope) confirmation.
Do you have a Student Loan which is not fully repaid?	aa_student_loan_choice	@choice – Allows a user to specify a positive (Yes, Yeah) or negative (No, nope) confirmation.
Did you finish your studies before the last 6 April?	aa_study_finish_choice	@choice – Allows a user to specify a positive (Yes, Yeah) or negative (No, nope) confirmation.
What is your date of birth?	aa_dob	@sys_date – Allows a user to specify past a present date in standard date formats as well as natural language (22/12/2020/22nd December 2020, Yesterday)