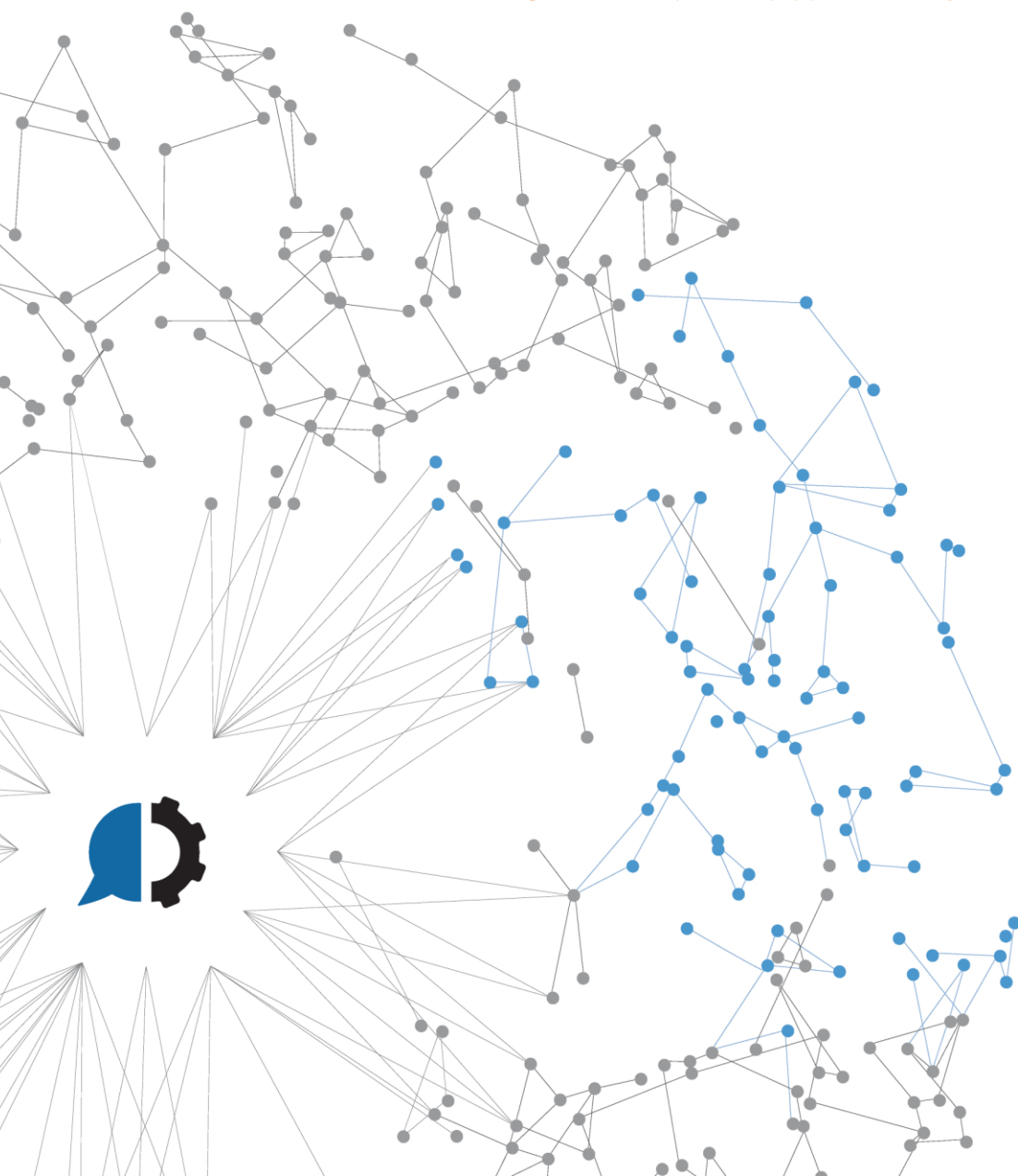




# ACUMATICA BOT

CREATE TIME ACTIVITIES FROM EXCEL INPUT





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## OVERVIEW

This how to guide introduces the ***Acumatica Bot - Create Time Activities from Excel INPUT***. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate we can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are report generation, file movement, data import and export, and scheduling batch processing.

The ***Acumatica Bot - Create Time Activities from Excel INPUT*** is based in the **Acumatica Contract-Based REST API**. It creates Time Activities in Acumatica by executing the “***TimeEntry***” HTTP method and update the Input Excel file with the result of the execution. This bot uses the simple Login to the Service method for authentication (username and password). Carefully check the [PREREQUISITES](#) and the [HOW TO GENERATE THE INPUT FILE](#) sections to get detailed information.



## PREREQUISITES

- **Automate:** The Acumatica Bot depends on Automate software in order to work. The minimum supported versions are:
  - [Automate Ultimate 11.2](#)
  - [Automate Plus 11.2](#)
  - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Acumatica Bot task
- **Acumatica:** Our minimal requirements are
  - **Acumatica Contract-Based API:** If not already installed you should install Acumatica ERP Configuration Wizard and create a new Acumatica ERP website to be able to use Contract-Based API. Contract-based APIs are built on an object model that the web services API provides.
  - **Acumatica account with proper permissions:** In order to be able to create Acumatica Time Activities from an Automate Bot, you will need to create a new account or use an existing one with proper permissions to the ***"Time and Expenses"*** module. If you don't have an administration role, you can ask to your Acumatica administrator.
  - **Acumatica API Version:** This bot was created using the **"18.200.001"** version, you should have this version available in your system.
- **Automate constants to be created to set the Acumatica connection values:**
  - **const\_AcumaticaURL:** The Acumatica URL for your domain and the Acumatica ERP instance.  
Example: <http://localhost/AcumaticaDB>
  - **const\_AcumaticaCompany:** The Acumatica company ID to which the logon will be made.
  - **const\_AcumaticaLocale:** The locale language to be used. Example: **"en-US"**
  - **const\_AcumaticaUserName:** Acumatica Username for logon.
  - **const\_AcumaticaPassword:** Acumatica user Password for logon.

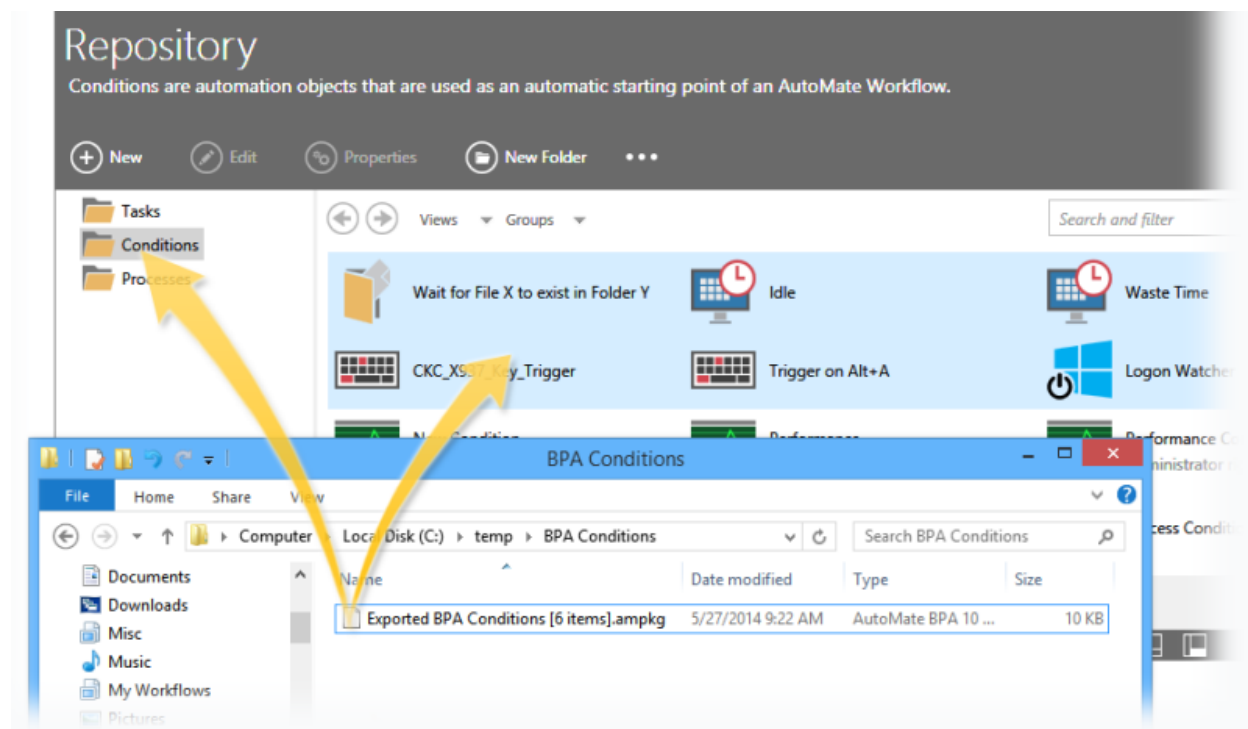


## HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.





## HOW TO GENERATE THE INPUT FILE

The input file **“Acumatica Create Time Activities INPUT.xlsx”** shipped with the Acumatica Bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

### The Acumatica create Time Activity screen:

Employee Time Activities ☆



Employee: [ ] Project: [ ] REGULAR OVERTIME TOTAL  
From Week: 2020-23 (05/31 - 06/06) Sub Job: [ ] Time S... 01:00 00:00 01:00  
Until Week: 2020-23 (05/31 - 06/06) Include All Rejected Billable: 00:00 00:00 00:00

Hold Status Date Time \*Earning Type Task \*Project Sub Job Certified Job Union Local Labor Item WCC Code Time Spent Billable Billable Time \*Description

### The Excel INPUT file

A	B	C	D	E	F	G	H	I	J	K	L
Acumatica Time Activity Fields											
Summary	Note	Status	Billable (X or Blank)	BillableTime HH:mm Example: 01:00	Certified Job (X or Blank)	DateTime dd-mm-YYYYTHH:mm:ss Example: 15/05/2020T11:00:00	EarningType	Employee	LaborItem	ProjectID	Time Spent HH:mm Example: 01:00

M	N	O
Created?	Result Details	
Yes/No	Date	Time Activity ID / Result Message

#### NOTES:

- Red fields** are mandatory. You will be able to define the Employee to the Time Activity to be created for.
- Pay attention to the formats described in **red**.
- Columns M to O in the INPUT file will be filled with the result of the execution, the Time Activity ID. See [APPENDIX A](#) for an example on the resulting.

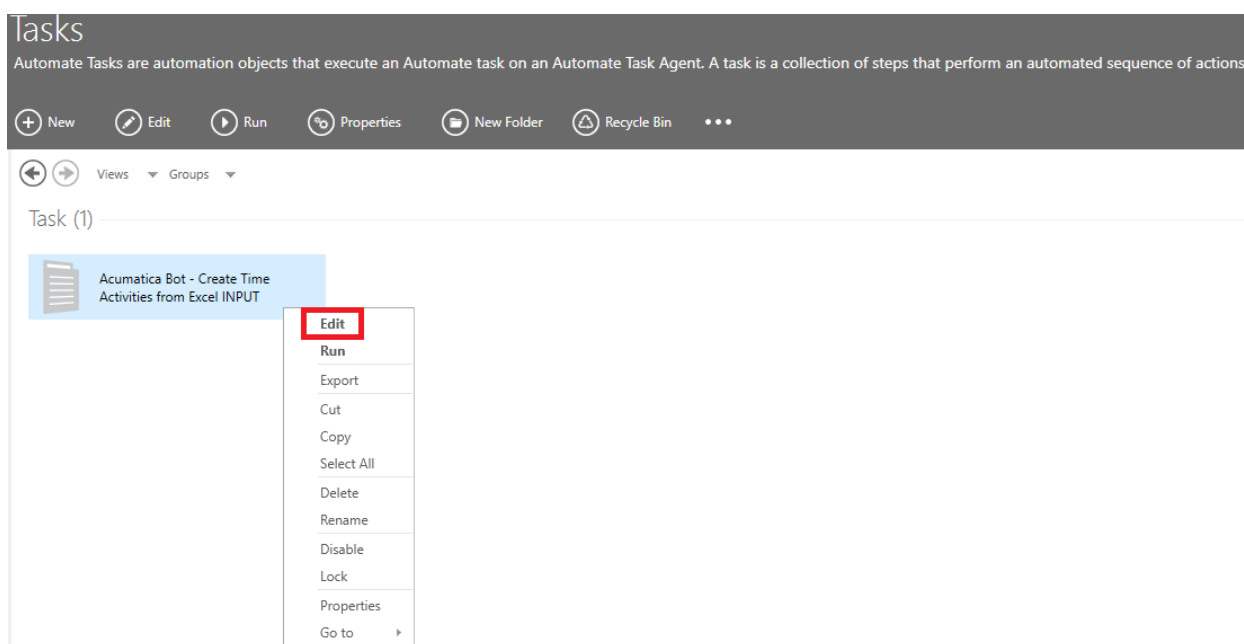


## HOW TO EXECUTE THE ACUMATICA BOT - CREATE TIME ACTIVITIES FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



From [step 2](#), edit the next variables according to you desired output:

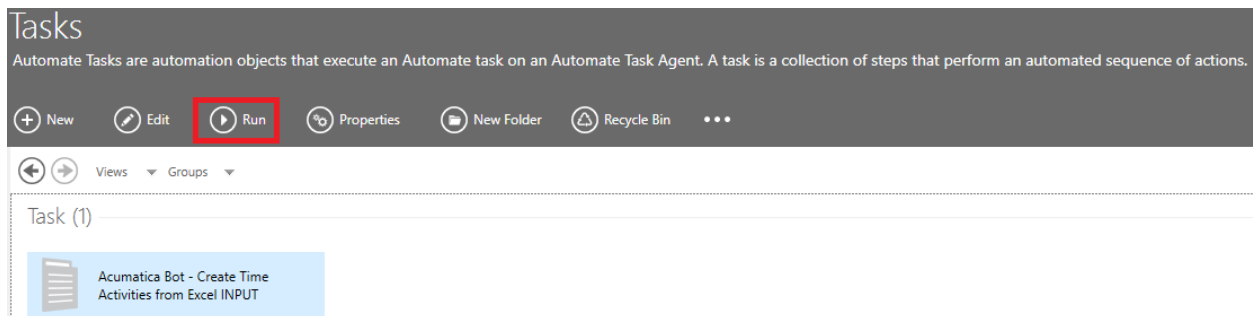
- [var\\_ExcelInputFile](#): The complete path and filename of the Acumatica Create Time Activities INPUT.xlsx.

Example: ***"D:\Automate\ Acumatica Create Time Activities INPUT.xlsx"***

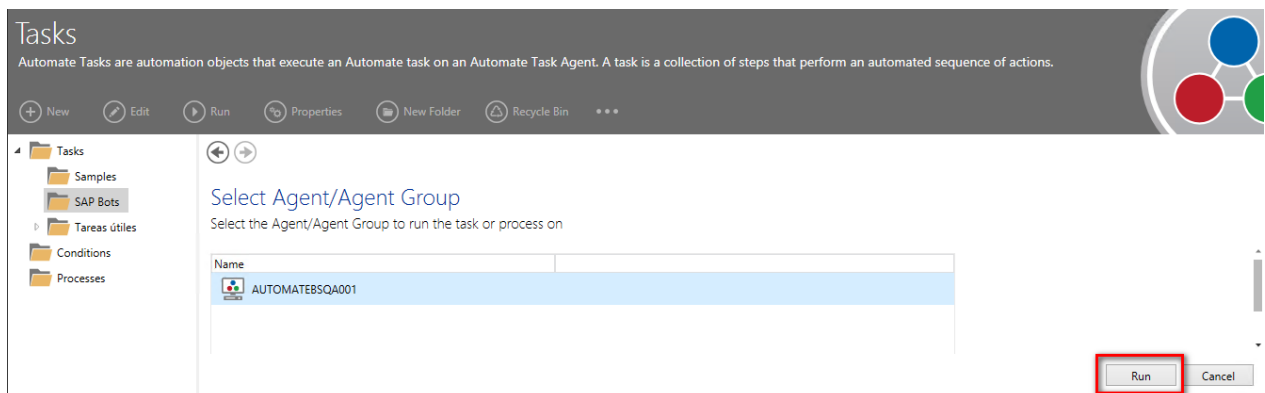
[Save and close](#) the task



Select the task and click on **Run**



Select your **Agent** and click on **Run** again







## APPENDIX A – EXCEL OUTPUT AND ACUMATICA TIME ACTIVITIES VIEW EXAMPLE

INPUT Excel file with results:

A	B	C	D	E	F	G	H	I	J	K	L
Acumatica Time Activity Fields											
Summary	Note	Status	Billable (X or Blank)	BillableTime HH:mm Example: 01:00	Certified Job (X or Blank)	DateTime dd-mm-YYYYTHH:mm:ss Example: 15/05/2020T11:00:00	EarningType	Employee	LaborItem	ProjectID	Time Spent HH:mm Example: 01:00
Automate Time Activity 1	Automate Time Activity Test 1	Open	X	01:00	X	01/06/2020T11:00:00	RG	SALVAREZ	PRINCIPAL	X	02:00
Automate Time Activity 2	Automate Time Activity Test 2	Open				01/06/2020T00:00:00	RG	SALVAREZ	PRINCIPAL	X	01:00
Automate Time Activity 3	Automate Time Activity Test 3	Open	X	01:00	X	01/06/2020T13:00:00	RG	SALVAREZ	PRINCIPAL	X	03:30

M	N	O
Created?	Result Details	
Yes/No	Date	Time Activity ID / Result Message
YES	01/06/2020 12:02:40 PM	Time Activity Id: e1746eed-18a4-ea11-aa43-f6ef80b75e09
YES	01/06/2020 12:02:41 PM	Time Activity Id: e4746eed-18a4-ea11-aa43-f6ef80b75e09
YES	01/06/2020 12:02:43 PM	Time Activity Id: e7746eed-18a4-ea11-aa43-f6ef80b75e09

**Note** that the execution result is written from column M to O. Column O will have the Time Activity ID created in Acumatica.

### Acumatica Time Activities view result:

Employee Time Activities ☆

\* Employee:

From Week:

2020-23 (05/31 - 06/06)

Until Week:

2020-23 (05/31 - 06/06)

Project:

Sub Job:

☒ Include All Rejected

REGULAR

Time S... 06:30

Billable: 02:00

OVERTIME

00:00

00:00

TOTAL

06:30

02:00

VIEW

<div><div></div><div></div></div>	Hold	Status	Date	Time	*Earning Type	Task	*Project	Sub Job	Certified Job	Union Local	Labor Item	WCC Code	Time Spent	Billable	Billable Time	*Description	
>	<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	Open	6/1/2020	12:00 AM	RG	X		<div><div></div><div></div></div>		PRINCIPAL		01:00	<div><div></div><div></div></div>		00:00	Automate Time Activity 2
<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	Open	6/1/2020	11:00 AM	RG	X			<div><div></div><div></div></div>		PRINCIPAL		02:00	<div><div></div><div></div></div>	01:00	Automate Time Activity 1	
<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	Open	6/1/2020	1:00 PM	RG	X			<div><div></div><div></div></div>		PRINCIPAL		03:30	<div><div></div><div></div></div>	01:00	Automate Time Activity 3	



## APPENDIX B - TROUBLESHOOTING

- Logs: Each iteration of our bot creates a log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Acumatica Bot - Create Time Activities from Excel INPUT*.



### About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and Automate processes, encrypt and secure data, and provide easy access to the information people