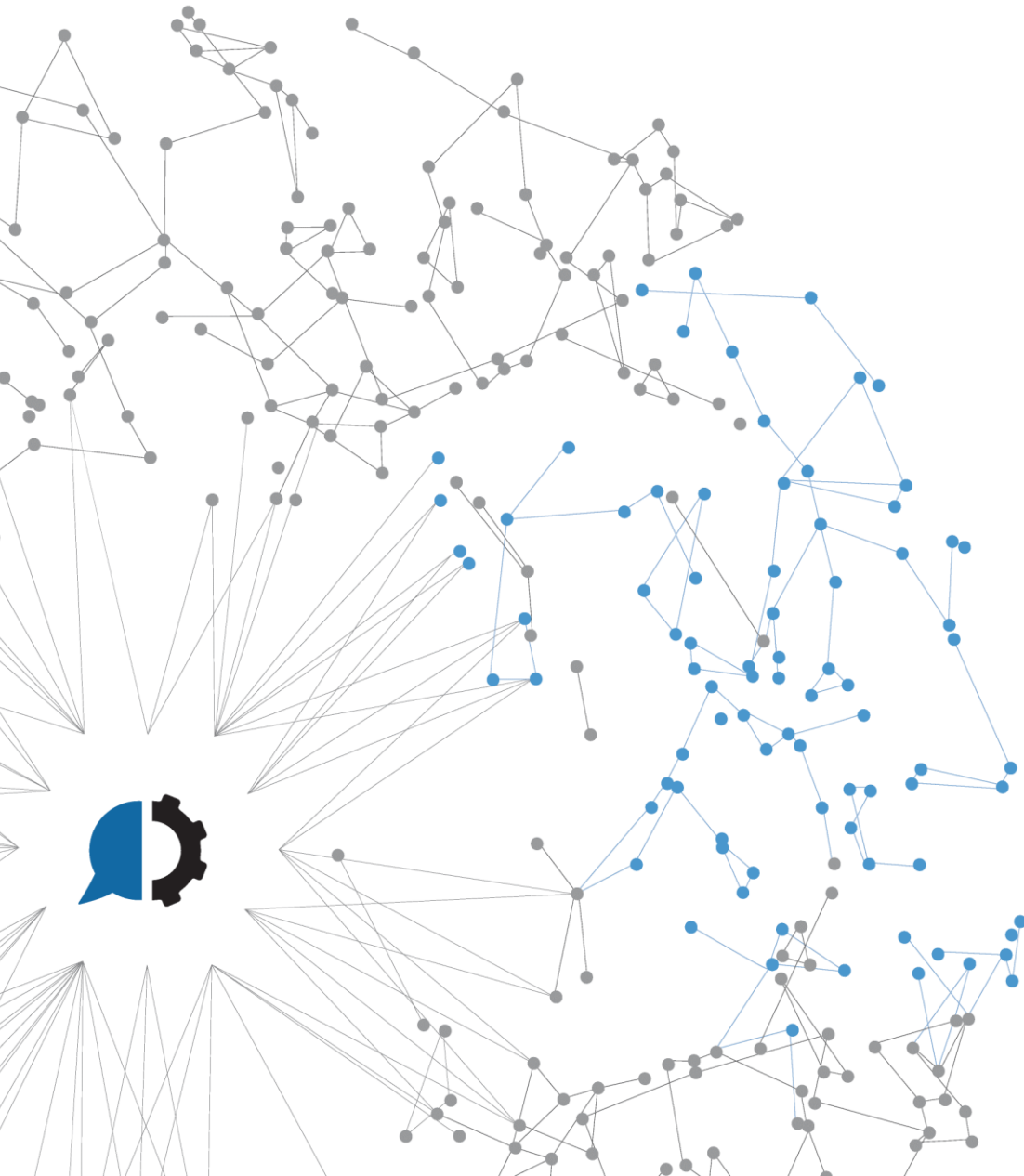




# ACUMATICA BOT

## LIST TIME ENTRIES TO EXCEL





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## OVERVIEW

This how to guide introduces the ***Acumatica Bot - List Time Entries to Excel***. 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 - List Time Entries to Excel*** is based in the **Acumatica Contract-Based REST API**. It lists Events in Acumatica by executing the “***TimeEntry***” HTTP method and update the Input Excel file with the resulting list. This Bot uses the simple Login to the Service method for authentication (username and password). Carefully check the [PREREQUISITES](#) section 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 Events from an Automate Bot, you will need to create a new account or use an existing one with proper creation permissions to the *"Time Entries"* objects. If you don't have an administration role, you can ask 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.

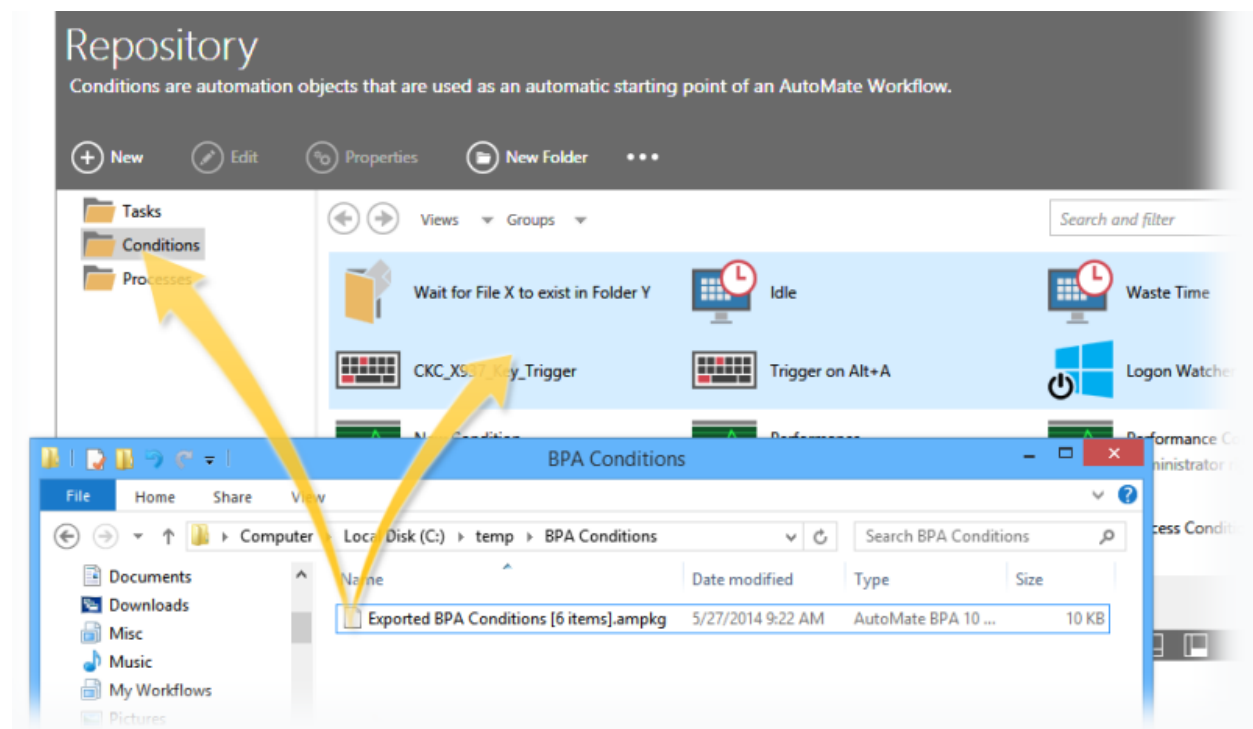


## HOW TO IMPORT AN AUTOMATE TASK

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.



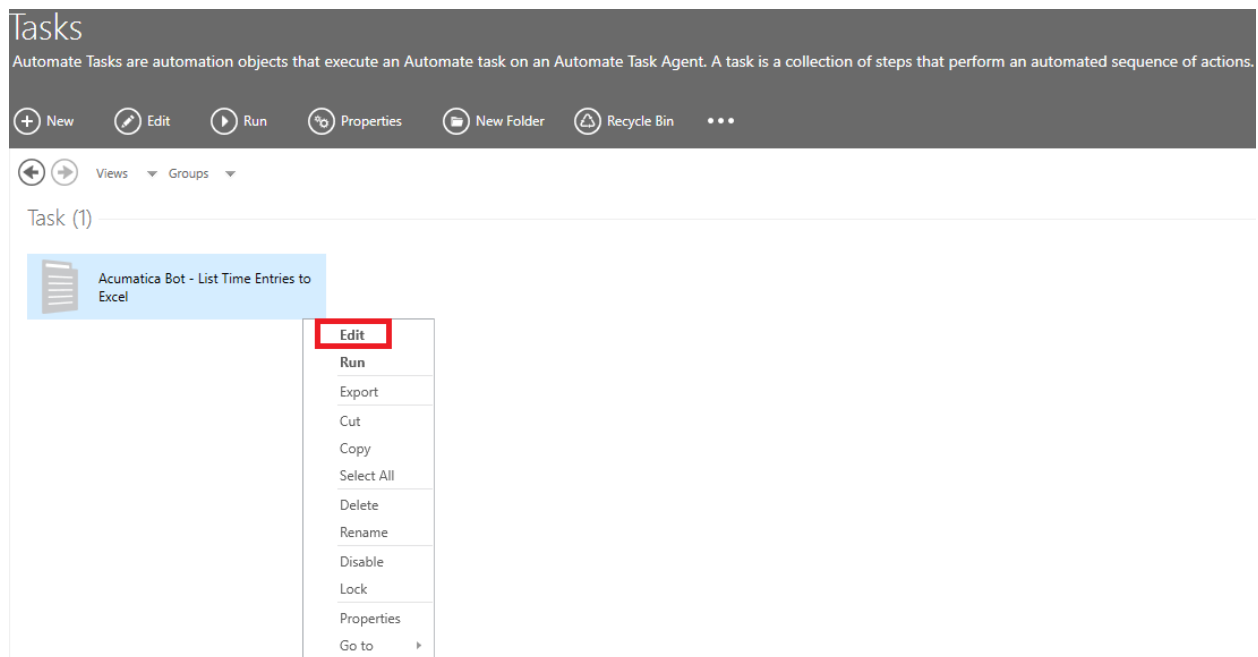


## HOW TO EXECUTE THE ACUMATICA BOT - LIST TIME ENTRIES TO EXCEL

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 your desired output:

- [var\\_TimeActivityStatus](#): Set the Approval Status for the Time Entries to be list. Example: Open and Completed.
- [var\\_StartDate](#): Set the End Date to retrieve the Time Entries. Format: dd/MM/yyyy Example: 25/05/2020.
- [var\\_EndDate](#): Set the End Date to retrieve the Time Entries. Format: dd/MM/yyyy Example: 26/05/2020.

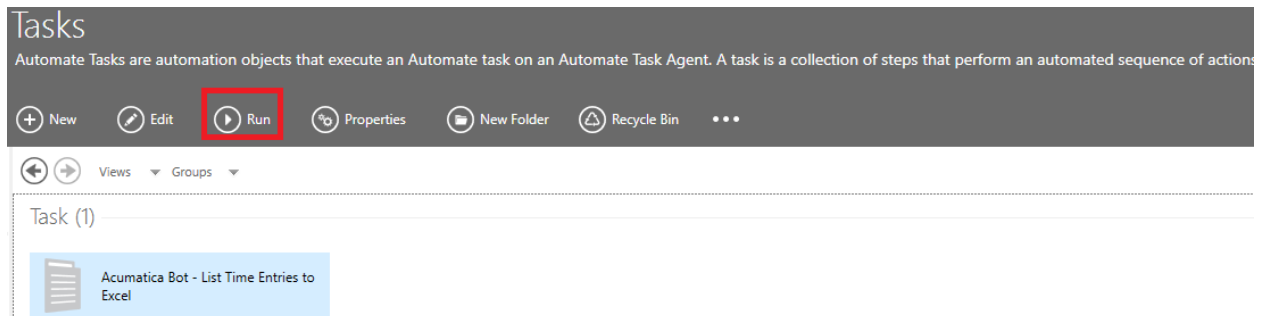
The output file will be automatically generated in the task folder with the next fields:

***id, Summary, note, ApprovalStatus, Billable, BillableTime, CertifiedJob, Date, Time, EarningType, Employee, LaborItem, ProjectID, TimeSpent, LastModifiedDateTime, ProjectTaskID, Overtime, BillableOvertime, CostRate, WCCCode and Approver.***

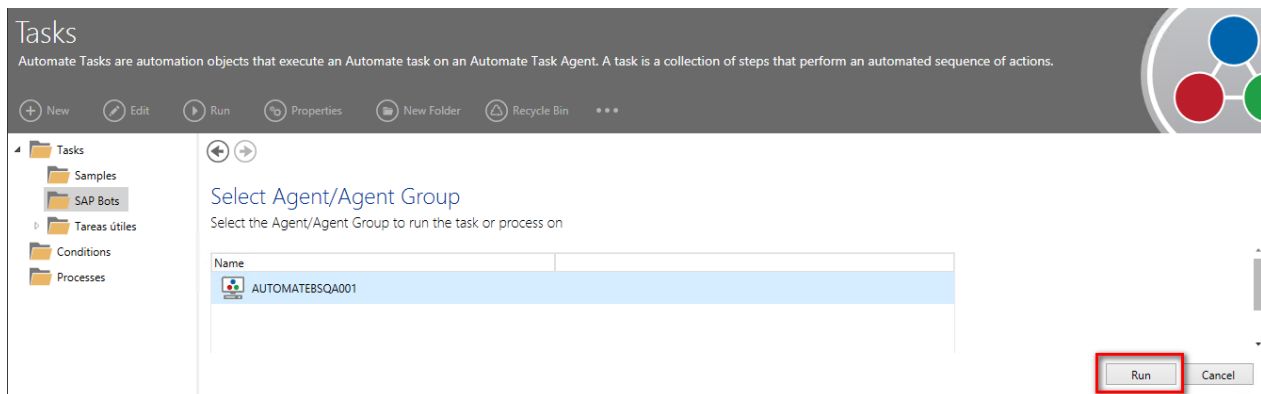
[Save and close](#) the task



Select the task and click on **Run**



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





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

### Acumatica Events and Time Activities view:

ALL EVENTS							TODAY	THIS WEEK	THIS MONTH	NEXT WEEK	NEXT MONTH
Summary	Status	Day Of Week	Date	Start Time	End Time	Related Entity Description					
Automate Event 1	Open	Tuesday	5/26/2020	11:00 AM	12:00 PM						
Automate Event 3	Open	Tuesday	5/26/2020	1:00 PM	2:00 PM						
Automate Event 2	Open	Wednesda	5/27/2020	12:00 AM	12:00 AM						

### Employee Time Activities ☆

Employee	Project	REGULAR	OVERTIME	TOTAL
From Week: 2020-23 (05/31 - 06/06)	Sub Job:	Time S.: 06:30	00:00	06:30
Until Week: 2020-23 (05/31 - 06/06)	<input checked="" type="checkbox"/> Include All Rejected	Billable: 02:00	00:00	02:00

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

### Excel Output file with results:

id	Summary	note	ApprovalStatus	Billable	BillableTime	CertifiedJob	Date	Time
e933abc-24f4856-87a2-055ba6422c5	Automate Event 2		Open	False	00:00	False	2020-05-27T00:00:00-04:00	1900-01-01T00:00:00-05:00
5e4d6b03-2617-4af5-9b88-0be93bae765	Automate Event 1		Open	False	00:00	False	2020-05-26T00:00:00-04:00	1900-01-01T11:00:00-05:00
b313554c-1e00-4af2-a0c2-a2a20f164cef	Automate Event 3		Open	False	00:00	False	2020-05-26T00:00:00-04:00	1900-01-01T13:00:00-05:00
e1746eed-18a4-ea11-aa43-f6e80b75e09	Automate Time Activity 1	Automate Time Activity Test 1	Open	True	01:00	True	2020-06-01T00:00:00-04:00	1900-01-01T11:00:00-05:00
e4746eed-18a4-ea11-aa43-f6e80b75e09	Automate Time Activity 2	Automate Time Activity Test 2	Open	False	00:00	False	2020-06-01T00:00:00-04:00	1900-01-01T00:00:00-05:00
e7746eed-18a4-ea11-aa43-f6e80b75e09	Automate Time Activity 3	Automate Time Activity Test 3	Open	True	01:00	True	2020-06-01T00:00:00-04:00	1900-01-01T13:00:00-05:00

EarningType	Employee	LaborItem	ProjectID	TimeSpent	LastModifiedDateTime	ProjectTaskID	Overtime	BillableOvertime	CostRate	WCCCode	Approver
RG	SALVAREZ		X	00:00	2020-06-01T11:26:32.39-04:00		00:00	00:00	0,0		
RG	SALVAREZ		X	00:00	2020-06-01T11:26:30.153-04:00		00:00	00:00	0,0		
RG	SALVAREZ		X	00:00	2020-06-01T11:26:33.827-04:00		00:00	00:00	0,0		
RG	SALVAREZ	PRINCIPAL	X	02:00	2020-06-01T11:02:39.03-04:00		00:00	00:00	0,0		
RG	SALVAREZ	PRINCIPAL	X	01:00	2020-06-01T11:02:41.86-04:00		00:00	00:00	0,0		
RG	SALVAREZ	PRINCIPAL	X	03:30	2020-06-01T11:02:43.187-04:00		00:00	00:00	0,0		

### AcumaticaTimeEntries\_09062020\_164741.xlsx

File naming pattern:

AcumaticaTimeEntries\_ Base Name  
 09062020 Represents the date of execution (ddMMyyyy)  
 164741 Represents the time of execution (Hmss)

**Note:** The output file will be created in the task folder: C:\Automate\Tasks\<<TASK NAME>>\.





## 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 - List Time Entries to Excel*.



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### **About HelpSystems**

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