



## **PeopleSoft Contract Creation**

### **Readme**

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**Version 1.0**

**30/10/2020**

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# 1. Introduction

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This document contains all essential information for the user to make full use of this A2019 PeopleSoft Contract Creation Bot. It includes a description of the functions, capabilities and step-by-step procedures for setup & configuration of the bot.

## 1.1 Overview

The process of PeopleSoft Contract Creation involves creating a contract by following two main steps. The first step is to fill the required fields in the Contract General Information and then continue the process by adding the number of required Contract Lines. There can be various Contract lines which need to be added accordingly to the contract given. Contract creation can be done either using the Activity Guide or through regular, manual entry. Mekkanos has automated this process in PeopleSoft using Automation Anywhere.

## 1.2 Steps & Use cases

The key steps & use cases include:

Step	Action	Description
1	Login into Manage Contract Entry	To create a contract, we need to login into Manage Contract Entry
2	Choose the Contracts General Information tab	Under Contracts General Information tab, fill the required fields such as Customers, Contract Type etc.
3	Choose the Contracts Lines tab	Under Contracts Lines tab, add the no. of the lines required for the contract
4	Select Account Distribution	Select the type of account when the billing/revenue happens
5	Select Amount Allocation	Add the amount to the existing project and recalculate the total amount
6	Define and Assign Billing Plan	Check the frequency of billing and type of payment, payment terms etc.
7	Define and Assign Revenue Plan	If needed to track the revenue separately
8	Select Contract Terms	Track the contract that is assigned at the Project and Task level
9	Select Contract Prepaids	Check whether any prepaids are assigned to contract or not
10	Save the information and logout	Save the details and logout of the portal
11.	Send the Email to respective contract	The Email should consist of the Contact details

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## 2. Requirements & Prerequisites

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### 2.1 System Requirements

#### Minimum Hardware Specification:

- RAM: 2 GB
- Hard Disk: 100 GB
- Processor: Intel Core i3, i5, i7 series

#### Software Specification:

- Automation Anywhere AA2019 Enterprise/Community Edition
- MS Office 2010 or later
- Windows 10 Operating System
- Outlook Email App

### 2.2 Prerequisites

The following pre-requisites are needed for the bot:

- Automation Anywhere A2019 (Bot Runner & Bot Agent)
- Microsoft Excel
- Google Chrome
- PeopleSoft System
- Outlook

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## 3. Getting Started

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### 3.1 Quick Start

#### 3.1.1 Setup

Download the bot from the bot store, by clicking on the “Contract Creation using PeopleSoft Activity Guide - Mekkanos” and follow the installation instructions.

#### 3.1.2 Configuration and Use

First, we must configure the “PS User Config.xlsx” file.

Parameter Name	Description
URL	URL of Peoplesoft System
Username	Username login for Peoplesoft
Password	Password credential for Peoplesoft
InputPath	Location of the Input File Path
OutputPath	Location of the Output File Path
LogPath	Location of the Log File Path
ErrorLogFile	Location of the Error File Path
ScreenshotPath	Location of the Screenshot File Path
Config	Location of the Config File Path
EmailFrom	From Email Address
EmailTo	To Email Address
EmailCC	CC Email Address
Email_Host	Host of the From Email Address (Eg: smtp.gmail.com)
Email_Port	Port of the From Email Address (Eg: 587)
Email_Password	Password of the From Email Address

Next, we must configure the “ContractInput.xlsx” file.

Parameters	Description
sBusinessUnit	Business Unit
sSoldToCustomer	Sold to Customer (ID)
sDescription	Description of the Contract
sProduct	Product Number
sProductDescription	Description of the Product
sPriceType	Type of Price to be used in the contract (Eg: Amount)
sPhysicalNature	Physical Nature of the contract (Eg: Goods)
sDistributionCode1	Distribution Code in Account Distribution
sAccount1	Account Number
sFixedBilling	Fixed Billing Amount
sBillingAmount	Billing Amount
sBillingLimit	Billing Limit
sQuantity	Quantity (Number of Items)
sProduct	Product ID
sTotalRevenue	Total Revenue Allocation in Amount Allocation
sPCBusinessUnit	PC Business Unit
sProject	Project Type
sActivity	Activity Type
sBillingPlan	Billing Plan opted for the contract
sBillingMethod	Billing Method for the contract
sDescription	Description of the Billing Plan
sBillingPlanTemplate	Billing Plan Template

sBillTemplateID	Bill Template ID
Status	Status of the contract (Eg: Pending / Active)
Description	Description of the billing plan
BIUnit	BI Unit
BillToCustomer	Bill To Customer ID
Addr Num	Address Number
Bill To Contact	Bill To Contact ID
Bill Type	Bill Type
Bill Source	Bill Source
sSummarizationTemplateID	Summarization Template ID in Billing Plan
Event Type	Date
Event Status	Pending
Event Date	Date
Ship To Customer	Ship To Customer
Addr Num1	Address Number
Ship From Location	Ship From Location
TaxCode	Tax Code
sRevenuePlan	Revenue Plan
sRevenueMethod	Revenue Method
sDescription	Description of the Assign Revenue Plan
sRevenuePlanTemplate	Revenue Plan Template

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## 4. Support & FAQs

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### 4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Enterprise A2019](#).

### 4.2 FAQs

Q.1. Can we use the same input file for all the contract processes?

A.1. The contracts of different types can be created by making changes in the input file. The keys of this file can be provided by the user itself.

For other questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#).



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## Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
<i>1</i>	<i>1.0.0.0</i>	<i>30/10/2020</i>	<i>Snigdha Singh</i>	<i>Initial Release of Bot</i>

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## Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A2019	Click <a href="#">here</a>
2	Guidance: Building basic A2019 bots	Click <a href="#">here</a>
3	Guidance: Building A2019 action packages	Click <a href="#">here</a>
4	APeople Community Forum	Click <a href="#">here</a>
5	Automation Anywhere University	Click <a href="#">here</a>