Oracle EBS Purchase Requisition Creation for OpsVeda identified Orders at Revenue Risk

Readme

Version 1.0

27th January 2021

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1. Introduction

This document contains all essential information for the user to make full use of this A2019 Oracle EBS Purchase Requisition Creation for OpsVeda detected Orders at Revenue Risk Bot. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.
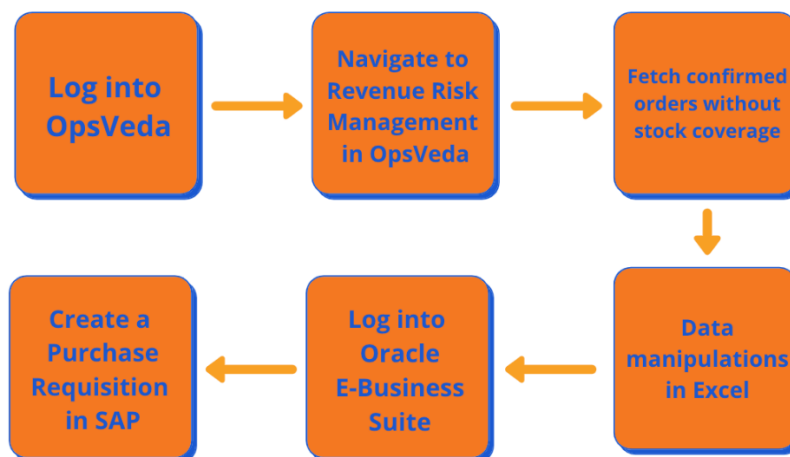
1.1 Overview

This bot takes the details of orders that cannot be serviced due to insufficient stock position as detected by OpsVeda based on the demand-supply match/ soft allocation, checks lead time requirements using Microsoft Excel and finally creates a purchase requisition in Oracle E-Business Suite.
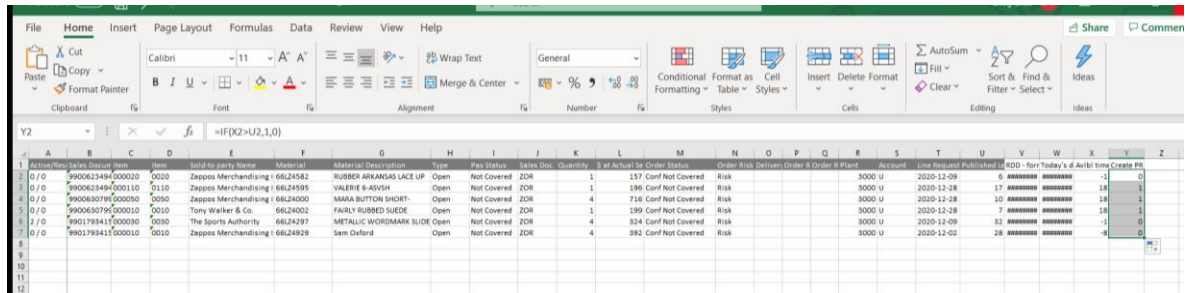
Detailed Steps:

1. Log into OpsVeda.
2. Navigate to Revenue Risk Management section of OpsVeda and drill-down to the orders that are confirmed but have no stock coverage. Download the filtered orders to Microsoft Excel.
3. In Microsoft Excel separate orders with materials that have sufficient lead time vis-à-vis required delivery date.
4. Log in to Oracle E-Business Suite.
5. Create Purchase Requisition in Oracle E-Business Suite for identified materials for required quantity.
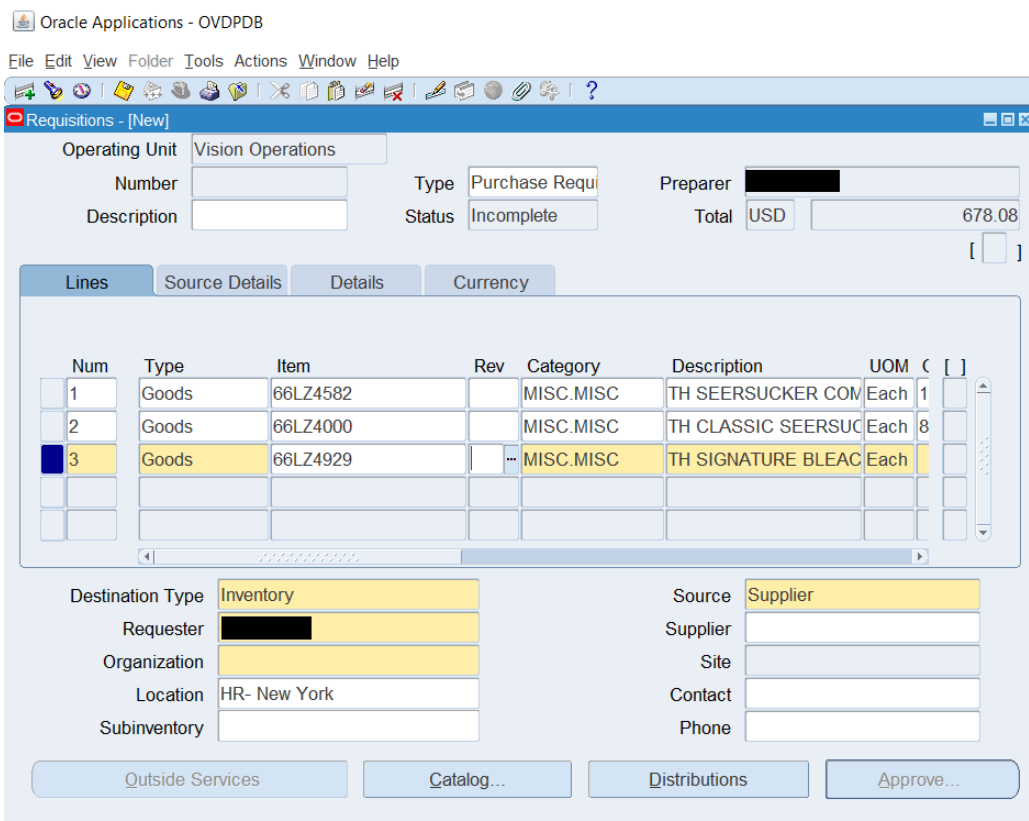
Flow Diagram:

Sample Input and Output:

- *User Generated Input:* Other than the configuration file, the bot requires no input from the user (for more details on the configuration file, see section 3.1.2)

- *Intermediate file* (auto-generated by the Bot after OpsVeda Task):

- *Sample Output* (Oracle Purchase Requisition):

1.2 Use cases

This bot can be used for:

1. Lost sales avoidance
2. Improved sales operations productivity
3. Increasing agility in supply chain operations

2.   Requirements & Prerequisites

2.1   System Requirements

Enterprise A2019 (Cloud deployed) and Community Edition device requirements.
Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an Enterprise A2019 (Cloud deployed) or Community Edition user on your local machine.

2.2   Prerequisites

- Software needed:

    o   Oracle E-Business Suite

    o   Google Chrome Internet Browser

    o   Internet Explorer Internet Browser (IE11)
        - *Note*: In order to use Oracle EBS with IE11, you would need to manually configure your browser and security zone settings. Please follow the steps in this guide to make the required changes before running the bot.

    o   Java Runtime Environment (Version 1.8)

    o   Microsoft Office Excel

- Accounts needed:

    o   OpsVeda Login

    o   Oracle E-Business Suite Login

3.   Getting Started

3.1   Quick Start

3.1.1   Setup

Before the bot can be deployed, you need to ensure that you have the following external accesses in place:

- OpsVeda Login
- Oracle E-Business Suite Login

In case you are not a current OpsVeda user or do not have access to OpsVeda (or OpsVeda's demo system) please contact us (https://opsveda.com/contact/).

3.1.2   Configuration and Use

Step 1: Setup up Credentials in the A2019 Control Room

In order to keep sensitive information like usernames, passwords, server addresses secure – store all such information in A2019 Control Room's Credential Vault.

Follow the step-by-step instructions below to set up the required credentials for OpsVeda and Oracle E-Business Suite in the Credentials Vault:

- Make sure the appropriate AA user (a bot runner) has the "Locker Consumer" role assigned to it.
- Create a Locker with the name "Oracle Main".
- Create the following credentials with the exact names and move them to the "Oracle Main" locker:

Locker Name	Credentials Name	Attribute Name	Value
Oracle Main	OpsVeda		Username Password
	Oracle Login		User Password

NOTE: Please make sure both your credential and value names are *exactly the same* as the ones given in the table above.

Step 2: Configure Parameters using an external config_oracle.xml file

config_oracle.xml File Path (Cannot be changed):

C:\ProgramData\AutomationAnywhere\config\config_oracle.xml

NOTE: The config file contains parameters that the bot ingests during runtime. The parameters are user specific and must be configured before the bot is run.

Sample Config File (All fields are mandatory):

```
config_oracle - Notepad                                                          —    □
File  Edit  Format  View  Help
<?xml version="1.0"?>
<opsveda>
<environment name ="chrome">
        <path>C:\Program Files\Google\Chrome\Application\chrome.exe</path>
        <pathparams>--new-window https://opvcloud.opsveda.com/OpsVeda_new</pathparams>
        </environment>
<environment name ="excel">
        <path>C:\Users     \Desktop\BOT\Month Revenue Potential-C Not Covered_Risk _ Conf Not Covered_12102020 12_12_04.xlsx</path>
        </environment>
<environment name ="Oracle">
        <pathexcel>C:\Users     \Desktop\BOT\Month Revenue Potential-C Not Covered_Risk _ Conf Not Covered_12102020 12_12_04.xlsx</pathexcel>
        <pathie>C:\Program Files (x86)\Internet Explorer\iexplore.exe</pathie>
        <oraclelink>http://                        _    /AppsLocalLogin.jsp</oraclelink>
        </environment>
</opsveda>
```

Mandatory fields for Configuring the Bot (need to be entered in C:\ProgramData\AutomationAnywhere\config\config_oracle.xml) –

Mandatory Config Fields (config_oracle.xml)		
Environment name	*Name*	*Purpose*
chrome	*path*	Local path to where Google Chrome is installed
	pathparams	<u>DO NOT CHANGE THIS FIELD</u>: Keep default value of: "--new-window https://opvcloud.opsveda.com/OpsVeda_new"
excel	*path*	Local path to the file downloaded by the bot after executing the OpsVeda RRM step
Oracle	*pathexcel*	Local path to the file downloaded by the bot after executing the Excel Ops Step (usually the same as "path" under environment name excel but can be different)
	pathie	Local path to where Internet Explorer is installed
	oraclelink	URL from where your Oracle E-Business Suite can be accessed.

After completing all of the above steps, you can begin using your Bot!

<u>NOTE</u>: All error logs/snapshots can be accessed at the below location on your machine (auto-generated by the bot):

C:\ProgramData\AutomationAnywhere\BotRunner\Logs\OraclePRCreation-OpsVeda

4. Support & FAQs

4.1 Support

Licensed OpsVeda users, please get in touch with your OpsVeda customer success manager.

You can also directly reach out to support@opsveda.com.

Additional guidance, tips & tricks, and automation capabilities can be found at knowledge.opsveda.com.

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

o What if I am not an existing OpsVeda user?
  o To get started, or to learn more about OpsVeda, contact us here (https://opsveda.com/contact/) so we can help you get set up.
o I get an error when the Bot tries to manipulate the Excel File before executing the Oracle task. What can I do?
  o The version 1.0 release of the bot performs excel operations using mouse clicks. You may be running into this issue because of your Mircosoft Excel Zoom settings. Please set your default zoom level to 70% and try again.

For questions relating to Enterprise A2019: See the Enterprise A2019 FAQs.

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	*1.0*	*27th January 2021*	*OpsVeda*	*Version 1 Release*

Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A2019	Click here
2	Guidance: Building basic A2019 bots	Click here
3	Guidance: Building A2019 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here