
rpaMan

Excel Slicers

Readme

Version 1.0

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1. Introduction

This document contains all the essential information for the user to make full use of the Excel Slicers bot. This manual includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

A common issue when using Excel with Automation Anywhere is the use of features outside of the Excel Command's scope. Whilst object cloning can be used, it is not always possible to select and interact with elements within a worksheet. The Excel Slicer bot allows you to access a current Excel session within Automation Anywhere and then select or clear the items on a given pivot table slicer.

1.2 Common Use cases

Common use cases for the Excel Slicer Metabot include scenarios where pivot reports are being created or used within an automation workflow and a particular set of filters needs to be applied to show only a subset of data

2. Requirements & Prerequisites

2.1 System Requirements

The Excel Slicer Metabot uses the Microsoft Office Excel Interop library and requires Excel to be installed on the target system.

2.2 Prerequisites

The Excel Slicers Metabot has been successfully tested with Automation Anywhere v11.3.x. Feel free to report any issues with other versions, and the developer will happily adjust to support other versions wherever possible.

2.3 Security Measures

N/A

2.4 Disclaimers

N/A

3. Getting Started

3.1 Skill Matrix

N/A

3.2 Installation Hierarchy

The Excel Slicers metabot itself will not generate any new folders.

3.3 Quick Start

The Excel Slicers Metabot is contained within the “My Metabots” folder and will need to be copied into the main “My Metabots” folder. There is a sample pivot file found in the “Inputs” folder and a sample task called MasterBot.atmx which will demo the metabot

3.3.1 Setup

Excel Slicers Metabot can be used directly in a calling atmx task

3.3.2 Configuration

Excel Slicers Metabot can run independently of external config files or the credential vault.

There are 4 logics contained within the Metabot:

1. SetWorkbookInstance
2. GetSlicerCacheNames
3. SelectSlicerItems
4. ClearSlicerItems

3.3.2.1 SetWorkbookInstance

If you have already opened the excel file within Automation Anywhere or another process, this logic will establish an instance with the workbook for performing slicer operations on

Variable Name	Description
vTargetWorkbook	<p>The target Excel workbook for performing slicer filtering actions on.</p> <p>Criteria:</p> <p>Workbook must already be open.</p> <p>Provide only the workbook name and not the full path.</p>

3.3.2.2 GetSlicerCacheNames

This logic returns an array of all the current slicers available in the set workbook instance. Useful if you are unsure what the names of the slicers are.

Variable Name	Description
arrSlicerCacheNames	Returns array of slicers in target workbook

3.3.2.3 SelectSlicerItems

This logic will select the provided items on the target slicer cache in the current workbook instance

Variable Name	Description
arrSlicerSelections	Array of slicer items to select Array must be 1 column
vSlicerCache	Name of the slicer to filter To find the name, Select the slicer and on the ribbon --> Slicer Tools Options --> Slicer Settings Name will include the prefix Slicer_

3.3.2.4 ClearSlicerItems

This logic clears all the filters on the provided slicer cache in the current workbook instance. The default state of clearing a slicer is all items are selected.

Variable Name	Description
vSlicerCache	Name of the slicer to filter To find the name, Select the slicer and on the ribbon --> Slicer Tools Options --> Slicer Settings Name will include the prefix Slicer_

4. Reports

N/A

5. Logs

N/A

6. Troubleshooting & Support

6.1 Support

For any feedback, including improvement suggestions, please contact Paulhawkins1@gmail.com. Any feedback is (more than) welcome!

6.2 FAQs

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	06/12/2019	Paul Hawkins	Initial Submission to Bot Store

Appendix B: Acronyms

No.	Acronym	Description

Appendix C: References

No.	Topic	Reference Link