

**d3mo**

**<CopyExcelToPowerPoint>**

**Readme**

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**Version 1.0**

**01/12/2020**

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# 1. Introduction

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

## 1.1 Overview

CopyExcelToPowerPoint is used to automate large slide decks when linking charts between the two programs is not an option. The bot fetches charts/graphs from Excel and pastes them into PowerPoint as Enhanced Metafiles for printability. The bot uses two input files, the first being the Excel document which holds the charts/graphs. The second is the PowerPoint template that the bot writes to. Configuring slides is a quick and easy process.

The output file of the bot is the populated PowerPoint document. This can be manually saved or AAE commands can be used to automate the saving process by adding an output folder.

## 1.2 Common Use cases

This bot can be used to fetch any chart or graph which is native to Excel. In other words, any chart which can be copied by selecting a range of cells is a candidate to be automated. The ideal use case is for large monthly (or weekly/daily) decks which consume lots of time copying and pasting from Excel. Instead of spending many hours copying and pasting, setting the position and size of the image, and navigating through the documents, the user can simply refresh the Excel with updated data and then run the bot to write new charts to the template file. Scenarios where this bot will not work would be when the Excel document has images of charts or graphs. Another scenario where this bot will not be able to fetch is when the desired chart or graph is a plug-in or add-on chart, such as Mekko charts.

## 1.3 System Requirements

No specific hardware requirements

## 1.4 Prerequisites

Developed on AAE 11.3.2 using Office 365 version 1908 (Build 11929.20516 Click-to-Run)

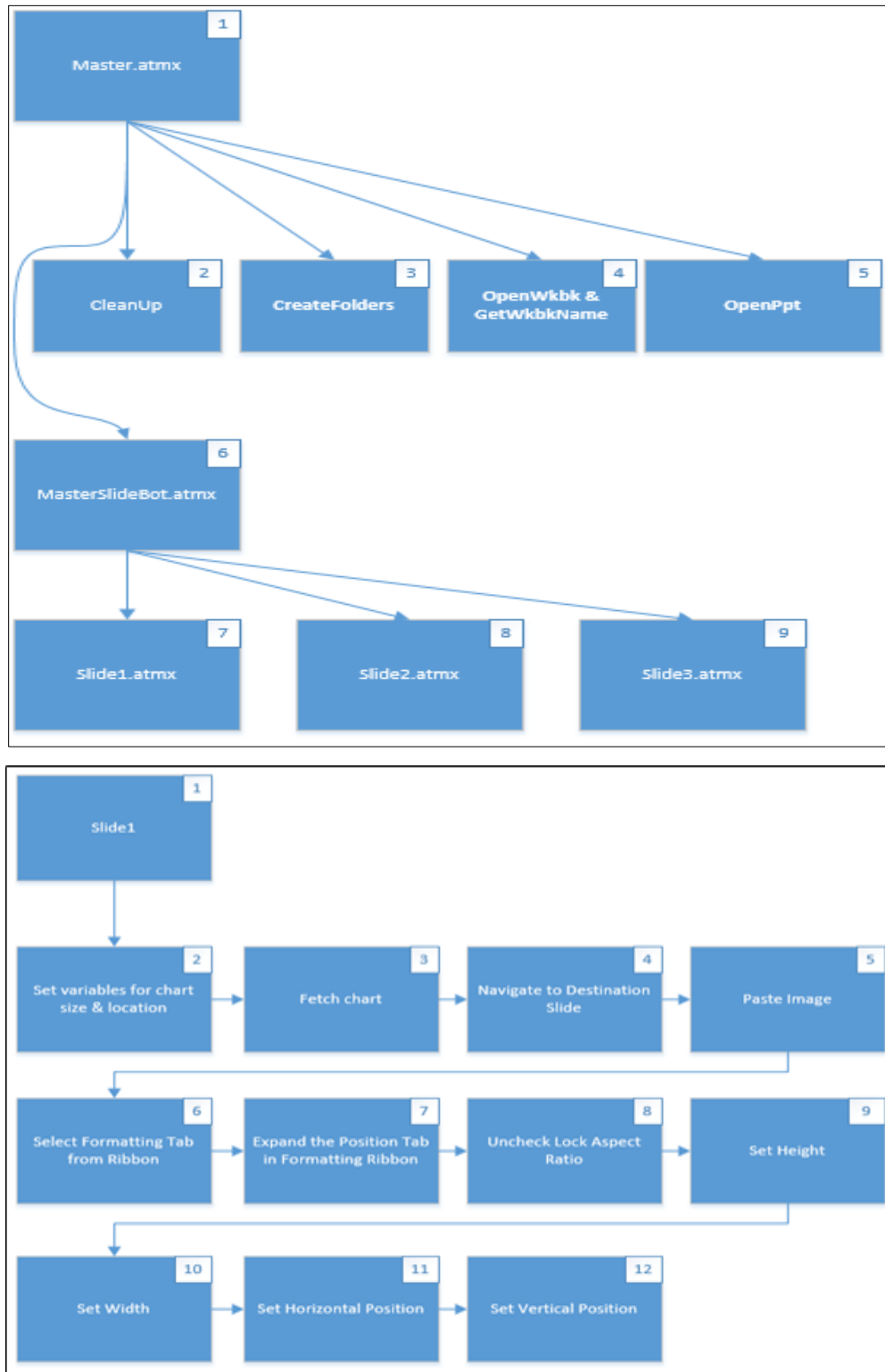
Requires Excel & PowerPoint.

## 1.5 Disclaimers

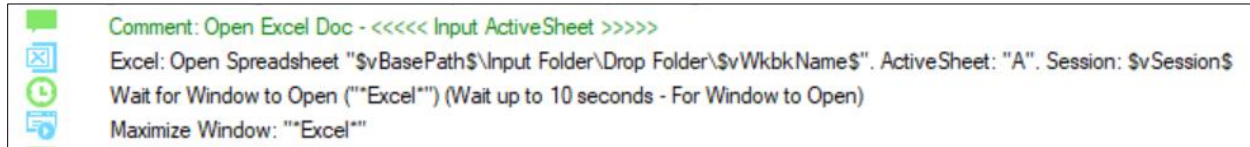
\*\*\*This bot contains a sub-task called CleanUp.atmx which will force close Excel and Powerpoint as soon as the Master.atmx is ran. Make sure to save any important documents before running or else they could be lost once the bot closes document recovery mode.

## 2. Getting Started

### 2.1 Skill Matrix



CopyExcelToPpt is factored into component pieces to make it easier to update as the slide count grows. If the bot is used for an 80-page slide deck and the bot's paste method needs to be updated, one line within the Paste.atmx file should require adjustment. Lines 13-15 in the SlideBots are not in component pieces because in version 11.3.2 or older, you cannot pass Excel sessions between sub-tasks; therefore, it is not possible.



If using a later version (11.3.3 or greater), you can create sub-tasks to handle this. Each Excel sheet within the workbook would require its own sub-task.

## 2.2 Installation Hierarchy

My Tasks\Bot Store\CopyExcelToPpt-d3mo\My Tasks

Master.atmx – Main processing bot – calls subtasks in order

CleanUp.atmx – Force closes Excel & PowerPoint

CreateFolders.atmx – Creates the folder structure

OpenWkbkGetWkbkName.atmx – Retrieves window title and performs string operation to obtain the title of the Excel document within the Drop Folder

MasterSlideBot.atmx – Calls SlideBots in order

ActivatePowerPoint.atmx – Activates the PowerPoint window

PasteEnhanceMetafile.atmx – Pastes clipboard as 'Enhanced Metafile' within PowerPoint

NavigateToFormatting.atmx – Navigates to the 'Format Picture' menu in PowerPoint

SendPastedToBack.atmx – This is used after the paste command when you want to send the image to the back of the slide, an example is in slide 4

ClearHeightSetHeight.atmx – This sets the height of the pasted object

ClearHpSetHp.atmx – This sets the horizontal position of the pasted object

ClearWidthSetWidth.atmx – This sets the width of the pasted object

ClearVpSetVp.atmx – This sets the vertical position of the pasted object

LockAspectRatioButton.atmx – This unchecks the checkbox titled 'Lock Aspect Ratio'

ExpandPositionTab.atmx – Selects the position expansion button (shown in screenshot)

My Tasks\Bot Store\CopyExcelToPpt-d3mo\My Tasks\Slides

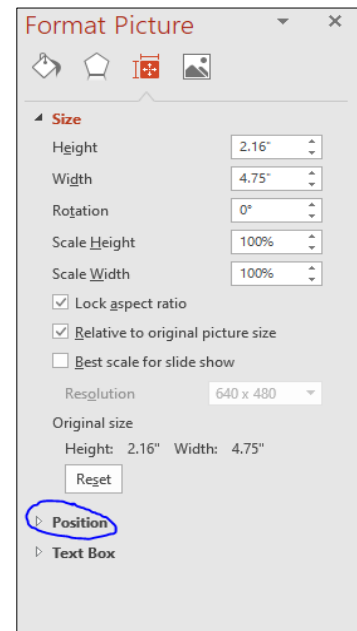
This folder is necessary to keep the bot organized as the slide count grows to larger numbers.

Slide2.atmx – Holds the commands and configuration for slide 2

Slide3.atmx – Holds the commands and configuration for slide 3

Slide4.atmx – Holds the commands and configuration for slide 4

My Tasks\Bot Store\CopyExcelToPpt-d3mo\Error Folder



## Logs

\$Month\$. \$Day\$. \$Year\$.txt

## Snapshots

\$Month\$. \$Day\$. \$Year\$. \$Hour\$. \$Minute\$. \$Second\$.png

My Tasks\Bot Store\CopyExcelToPpt-d3mo\Input Folder

## Drop Folder

DropFileTest.xlsx

## Template

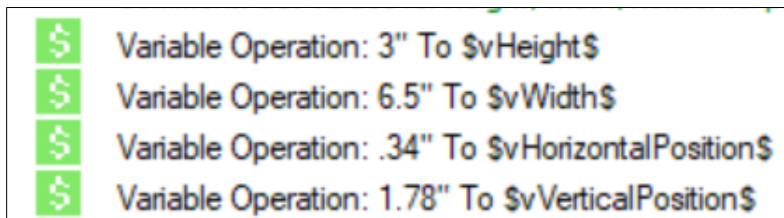
Template.pptx

## 2.3 Quick Start

CopyExcelToPpt works out of the box using the pre-loaded template and drop file as a demonstration, just hit run on Master.atmx. The way the bot operates is by opening the file inside AAFiles > AA > My Tasks > Bot Store > CopyExcelToPpt-d3mo > Input Folder > Drop Folder and assigning the name of the document to the variable vWkbkName. This folder must only have a single .xlsx file inside to work properly. To configure this bot to work with your .xlsx file, follow this guide:

<<<<< >>>>> - call outs

- 1) Using slide2.atmx as a template, copy and paste the contents and variables to your new taskfile, name it 'slide#.atmx', and save it to the slides folder inside My Tasks. Set the vHeight, vWidth, vHorizontalPosition, & vVerticalPosition at the top of the slide#.atmx file on lines 4-7. These variables set the location and size of the chart in PowerPoint.

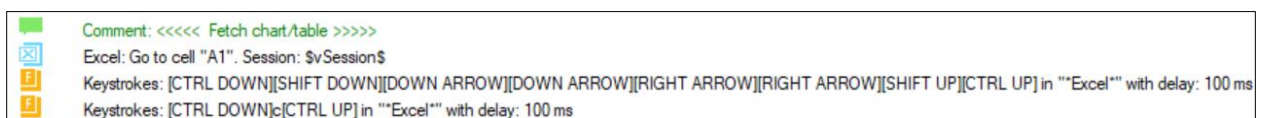


- 2) Set the ActiveSheet on line 14 to the Excel tab (using tab name) which holds the chart to be fetched.

Comment: Open Excel Doc - <<<<< Input ActiveSheet >>>>>



Excel: Open Spreadsheet "\$vBasePath\$\Input Folder\Drop Folder\ \$vWkbkName\$". ActiveSheet: "A". Session: \$vSession\$

- 3) Set line 18 'Go to cell' command to a corner cell of the chart to fetch. \*\*Do not set this to merged cells. Use Keystrokes command to select the chart range before copying.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	EBITDA	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FY
2	TOTALS	5.0	4.0	6.0	4.0	3.0	4.0	3.0	5.0	1.0	1.0	4.0	4.0	44.0
3	A	3.0	3.0	2.0	2.0	5.0	1.0	4.0	5.0	6.0	4.0	6.0	5.0	46.0
4	B	1.0	1.0	6.0	3.0	3.0	1.0	6.0	4.0	4.0	2.0	1.0	6.0	38.0
5	C	4.0	3.0	5.0	1.0	5.0	2.0	5.0	1.0	1.0	2.0	3.0	5.0	37.0
6	D	4.0	4.0	5.0	3.0	4.0	2.0	5.0	5.0	3.0	6.0	4.0	1.0	46.0
7	E	2.0	5.0	3.0	3.0	2.0	5.0	4.0	6.0	1.0	4.0	5.0	6.0	46.0
8	F	4.0	1.0	2.0	3.0	3.0	6.0	2.0	1.0	3.0	1.0	2.0	6.0	34.0
9	G	5.0	5.0	2.0	1.0	3.0	5.0	3.0	2.0	1.0	2.0	6.0	3.0	38.0
10	H	1.0	2.0	4.0	5.0	4.0	4.0	6.0	6.0	6.0	1.0	3.0	2.0	44.0
11	I	4.0	1.0	1.0	1.0	4.0	6.0	5.0	6.0	1.0	5.0	2.0	5.0	41.0
12	J	6.0	4.0	4.0	1.0	5.0	6.0	1.0	2.0	1.0	5.0	6.0	2.0	43.0

- 4) Adjust line 27 if navigating more than 1 slide down from previous slide. In other words, slide2.atmx is 1 slide down from the title slide, therefore it navigates one slide down [PAGE DOWN]. If your first chart destination is on slide 3, *skipping* slide 2, then you would use [PAGE DOWN][PAGE DOWN] to navigate two slides down from the title slide.

	Comment: <<<<< Page down to destination slide >>>>>
	Keystrokes: [PAGE DOWN] in ".pptx" with delay: 200 ms

### 2.3.1 Configuration

- For External File –

INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandatory	Purpose	Example Input
vBasePath	String	Yes	Provide the path for My Tasks > Bot Store > CopyExcelToPpt-d3mo	\$AAApplicationPath\$\Automation Anywhere\My Tasks\Bot Store\CopyExcelToPpt-d3mo
vErrorFolder	String	Yes	Provide the path for CopyExcelToPpt-d3mo > Error Folder	\$AAApplicationPath\$\Automation Anywhere\My Tasks\Bot Store\CopyExcelToPpt-d3mo\Error Folder
vErrorFolderLogs	String	Yes	Path for Error Folder Logs	\$vErrorFolder\$\Logs
vSnapshotFolder	String	Yes	Path for Error Folder Snapshots	\$vErrorFolder\$\Snapshots
vTaskName	String	Yes	Taskbot name assigned to this variable for identifying tasks in Error Log	Master.atmx
vWkbkName	String	Yes	Gets assigned name of window after opening Excel doc in Input folder	DropFileTest.xlsx
vHeight	String	Yes	Height of chart in PowerPoint	3"
vWidth	String	Yes	Width of chart in PowerPoint	6.5"
vHorizontalPosition	String	Yes	Horizontal Position of chart in PowerPoint	.35"
vVerticalPosition	String	Yes	Vertical Position of chart in PowerPoint	1.8"

OUTPUT VARIABLES: Output Variables to be mentioned in this Table.				
Variable Name	Type	Mandatory	Purpose	Example Output
N/A	N/A	N/A	N/A	N/A



## 4. Logs

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*Text logs are generated by each .atmx file and stored in My Tasks\Bot Store\CopyExcelToPpt-d3mo>Error Folder\Logs*

*Snapshot logs are generated by each .atmx file and stored in My Tasks\Bot Store\CopyExcelToPpt-d3mo>Error Folder\Snapshots*

## **5. Troubleshooting & Support**

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### **5.1 Support**

<http://apeople.automationanywhere.com>

## Appendix A: Record of Changes

*Instructions: Provide information on the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.*

No.	Version Number	Date of Change	Author	Notes
<b>1</b>	1.0	1/8/2020	Eric Ballard	Initial bot release. This bot is released so that the community can benefit and find ways to improve this bot.