

# Outlook to Excel Assistant

## README

**Version 1.0**

**22/10/2021**

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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 Outlook to Excel Assistant. It includes a description of the functions and capabilities and step-by-step Procedures for setup & configuration of the python package.

## 1.1 Overview

The Bot, Outlook to Excel Assistant is designed to fetch the table content from the mail body and convert to an excel workbook and followed by saving to OneDrive account. The necessary email filter can be specified in the config file.

- The python code is executed for the purpose of converting html table to csv file.
- Converts the CSV file to Excel workbook.
- Save the Excel in a OneDrive folder path as specified in the config file.

## Steps

Steps followed in the bot build:

- Read required data from the config file for email filter.
- Bot will fetch email filter conditions from config file. Bot loops through each mail according to the user preference (read/unread/all) and filter required emails. If all the filter conditions were match bot saving the email body containing html table to local device path as html file.
- Executing the python script to convert the html table to CSV file.
- The CSV file then converted to Excel worksheet.
- The Excel workbook is saved into OneDrive Folder as per user preference. This path is reading from the config file.
- The email which includes the Mail subject, Mail message, Table Heading, Mail Signature
- The bot creates an Error Log folder in the AA Dir as follows:

C:\ProgramData\AutomationAnywhere\Bots\Outlook to Excel Assistant\Error Log



- The bot able to create the following files in the Output folder

C:\ProgramData\AutomationAnywhere\Bots\Outlook to Excel Assistant\Error Log

- Outputfile.html
- File.csv
- Monthly Report.xlsx

## 1.2 Use cases

The key use cases include:

- 1 This bot can be used in any organizations to save the extracted html table from the mail body to OneDrive folder as an Excel workbook.
- 2 Email body containing multiple tables can also be used
- 3 Reliable and Efficient
- 4 Time Saver
- 5 Easy to use

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## 2 Requirements & Pre-requisites

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### 2.1 System Requirements

#### [A360 \(Cloud deployed\) 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 A360 (Cloud deployed) or Community Edition user on your local machine.

### 2.2 Prerequisites

1. Automation 360 setup to run in your machine
2. Bot creator license
3. Python version 3.x and above
4. Python packages – BeautifulSoup4

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## 3 Getting Started

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### 3.1 Quick Start

#### Setup

- Install the Bot from Bot Store into your Control Room.
- Navigate to Bot Store folder to examine the installed bots.

#### 3.1.1 Configuration and Use

- Install Python.
  - Download link: <https://www.python.org/downloads>
  - Verify installation: <https://docs.python.org/3/using/windows.html#from-the-command-line>

- Package installation  
Execute the following commands

```
pip install beautifulsoup4
```

- Configuration Content  
The below table contains configuration keys and sample values. User needs to provide the actual values as per the use.

Key	Value	Description
EmailSubject	Monthly Report	The "subject" name used to filter the mail.
EmailFrom	<a href="mailto:test@gmail.com">test@gmail.com</a>	The "from address" used to filter the mail.
EmailTo	test@company.onmicrosoft.com	The "To mail address" used to filter the mail
EmailReceived Date	1/10/2021	The "Email Received Date" used to filter the mail



FolderPath	https://[REDACTED]my.sharepoint.com/:f:/g/personal/denitta_cloudsys_developmentteam_onmicrosoft_com/EhKLoFq4dQhBuwOmHbSINLoB8jX294cX6qodcjktxtK-w?e=m6s0h8	The Folder path to which the excel workbook need to save in the OneDrive Account
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- Office 365 credentials:

The user need to provide the credentials to connect the OneDrive for authorize the user.

The following needs to provide by the user in the variables.

- \$userName\$ : [REDACTED].onmicrosoft.com
- \$password\$ : test@123
- \$tenantId\$ : 706202c-e32e-49ca-nb66-4e16d3a69bbf
- \$clientId\$ : 7bf93fa4-69ba-846b-89dd-83ced92c0018
- \$ClientSecretKey\$ : oaV7Q~mHgu0LNneMuhz.2p698Q0BeTJxeAdI

Mainly used variables are listed below.

VARIABLES: The variables which used in the workflow				
Variable Name	Type	Mandatory	Purpose	Value
sAppRoot	String	Yes	Root directory where the Process related folders exist	C:\ProgramData\AutomationAnywhere\Bots\Table in Outlook to Onedrive
EmailDetails	Dictionary	Yes	The details embed in the email body	\$EmailDetails{emailMessage}\$



OutputFile	String	Yes	The path location to log the mailbody containing html Table	\$Output\$\OutputFile.html
fConfig	File	Yes	The config data are adding to this excel file	The config file is reading from the Control room
Runlogpath	String	Yes	Path where the run log file is saved	\$LogFolder\$\RunLogPath.csv

- Sample input for email body:

Date	Day	Regular(hr)	Overtime(hr)	Total(hr)	
08-01-21	Monday	8	4	12	
08-02-21	Tuesday	8		8	
08-03-21	Wednesday	7		7	
08-04-21	Thursday	8		8	
08-05-21	Friday	8		8	
08-06-21	Saturday	8		8	
08-07-21	Sunday				
08-08-21	Monday	8		8	
08-09-21	Tuesday	8		8	
08-10-21	Wednesday	8		8	
08-11-21	Thursday	8		8	
08-12-21	Friday	8		8	
08-13-21	Saturday	8	4	12	
08-14-21	Sunday				
08-15-21	Monday	8	4	12	
Total Hours		103	12	115	Total hours
Hourly Rate		500	1000		
Pay		51500	12000	63500	

## 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 [Automation 360](#).

### 4.2 FAQs

Q: Can I make changes to this process/bot?

A: Absolutely. Free process/bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

For questions relating to Automation 360: [See the Automation 360 FAQs](#)



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## Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1.	1.0	22/10/2021	Jisha Rose	Version 1.0

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## Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A360	Click <a href="#">here</a>
2	Guidance: Building basic A360 bots	Click <a href="#">here</a>
3	Guidance: Building A360 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>