

Optimum Upgrade – Automation Quick Start Guide

What This Guide Covers

- How to enable Excel automation
- How to import the Optimum Upgrade VBA module
- How to use the automation macros
- Recommended workflow for PM/SE/Test teams

1. Requirements

To use the automation features, ensure:

- Windows + Excel installed
- Excel Trust Center: “Trust access to the VBA project object model” enabled
- Macros allowed for the workbook

2. Importing the Automation (VBA Module)

Use the included import_vba.ps1 script:

1. Open PowerShell
2. Navigate to the automation folder
3. Run: `.\import_vba.ps1`

The script converts workbooks to .xlsm (if needed) and injects the automation module.

3. Using the Automation Macros

Once imported, the workbook offers these macros:

- GenerateTestCasesFromRequirements
- BuildVerificationSummary
- ExportVerificationSummaryCSV
- EnsureProjectInfoSheet
- UpdateSheetHeadersFromProjectInfo

4. Recommended Workflow

1. Create or import requirements into the Requirements sheet
2. Run GenerateTestCasesFromRequirements
3. Run BuildVerificationSummary
4. Export CSV for reporting if needed
5. Use ProjectInfo sheet to keep project metadata consistent

5. Control Panel (Optional)

Use Automation_ControlPanel_Template.xlsx to copy a ControlPanel sheet into your workbook. Add buttons and assign them to the macros for a click-based interface.

You're ready to automate your PM/SE workflows with Optimum Upgrade!