**Macro-Enabled M-Line Drive Selection**

**Detailed Instructions**

NOTE: This is the newest version of the automation, in which I attempted to roll all the steps into one, concise program. That being said, if the website pdf2go.com/pdf-to-excel ever goes down, whether permanently or temporarily, it might be best to manually run this conversion, and then use the **DriveSelect – no PDF Converter** sheet located in the **Backup** folder

1. Navigate to the **VFD\_Parse** folder (stored **S:\M Series Drive Selection**). There is the small possibility that two or more people need to obtain a drive selection at the same time, but I included safeguards to ensure that the file can be used simultaneously, if need be. Basically, there will be a spare sheet called **Temporary.xlsm** created in your **Downloads** folder as a buffer to avoid multiple people writing to the same sheet. Delete this however frequently you want, but it will be recreated with each call to the **DriveSelect** macro set.
   1. This folder also contains a **Backup** folder if you accidentally corrupt the original template. In that case, use the backup template to copy over the original (but always keep the backup). Make sure its name matches **VFD\_Template.xlsm**
      1. As minor as it may seem, the macros depend on the template having **2 extra sheets named “Sheet2” and “IVI”.** The “**IVI**” sheet should have the standard lookup table for IVIs. Without these, the macros will fail
2. Open the **Main** folder. You will remain in this folder for most of this process. Open **DriveSelect.xlsm**. This is the main sheet from which you can call the macros to make a Drive Selection/VFD Sheet/IVI Sheet for each part of the order.
   1. If you somehow accidentally delete the macro set contained in this file, you can recover it from **Parser.txt**, within the **Backup** folder
   2. It isn’t particularly important what you do/don’t have open in Excel before beginning the macros. The macros include comprehensive File I/O handling to make sure nothing is being opened that’s already opened. Errors are still possible though, visit the **Troubleshooting** document for help in the rare case an error like this pops up
3. As per the large instructions you should see on the main sheet (“**Sheet1**”) in **DriveSelect.xlsm**, all you must do to begin is type **Ctrl+M** anywhere on the sheet to activate the **CreateVFDSheets** macro. This will create individual sheets with all the necessary and relevant information for Drive Selection and VFD Parameters, following the standard template. Alternatively, if you just need to quickly create an email from an already-completed Drive Sheet, type **Ctrl+E** anywhere on the sheet to generate this template. It depends on complete sheets though, so make sure the one(s) you select from the path **S:\M Series Drive Selections\Drive Selection Sheets** is sufficiently filled. Choosing all sheets from the same base SO # will work just fine, and this will make generating emails for orders with multiple lines trivial
   1. **Tip:** Any prompt telling you to click the “OK” button will read the **Enter** key just fine
   2. If using the newest version, you’ll be instantly redirected to the PDF converter website. All you have to do is click the **Choose File** button and select the PDF from the **released** folder to convert, and it will soon download. You’ll then click back into Excel.
   3. You’ll need to enter your initials for each sheet it processes. The macros will prompt you, but they won’t differentiate between initials and any other characters on the keyboard. You may need to go in and change your initials if you mistype something. Type your initials and press the **Enter** key to continue for each sheet it finds
   4. **NOTE:** When you do this, you’ll almost definitely see your screen flash quite a few times, depending on the number of sub-orders within the whole order. This is normal and is just the result of the macros needing to open and close workbooks rapidly.
   5. When you run this, **DON’T CLICK OR TYPE ON ANYTHING WITHOUT A PROMPT**. Try to minimize interference with the Excel Macros as much as you can.
   6. If the order contains one or more **M140**’s, the module used to calculate its fans takes **noticeably longer** than any other unit. The module works fine, it’s just waiting on the calculations to finish. Again, don’t click anything in the meantime
   7. At any point in the process, whether after exiting successfully or not, make sure to leave any values in **DriveSelect.xlsm** that appear. If you clear everything out manually, it will be “confused” when it tries to clear everything out as part of the initial formatting steps, because it will look for something that doesn’t exist. So, if the sheet appears empty, simply type whatever you want into any cell and **save** it.
4. If there were no error messages, a success message should appear on your screen. If you go back into the path **S:\M Series Drive Selections\Drive Selection Sheets**, you should see the newly created sheets, complete with your initials on them. The sheets follow the same naming convention as their predecessors. The prompts will try to get you to auto-fill an email before letting you view these sheets, though. As a shortcut, you can generate these emails and click on the attached sheet – it is the one you just created.
   1. If there were errors, see the **Troubleshooting** document
   2. If you saw messages informing you that some fields were not found, this may affect the **naming** of the newly created document. Check the entire list (usually near the top) for names that do not follow the standard naming convention if you can’t find the sheet you were trying to make
   3. Most of the time, if you open these newly-created sheets, it will throw up a warning about trusting macros. The warning will either appear as a pop-up or as a yellow bar above the sheet. This macro, **CreateVFDSheets**, is completely safe, but it is a hassle to try disabling these warning messages within a macro. Click the necessary button to enable macros
   4. The macros will **overwrite** any files with exact matching names. This behavior could be useful in “fixing” an error-prone Drive Sheet, or if any old VFD/Drive orders need to be recreated for some reason
5. Once opening the sheets just created, you should see the correct parameters loaded in and calculated all in one spot. Again, for any problems, see the **Troubleshooting** document
   1. No sheets will be created for any **S units** (or any other besides **M**, for that matter) appearing on the same order
   2. The Lau module creates a file with each run: **element\_select.tmp.** I’ve even found this file in various other folders besides the destination. I’m not sure of its purpose but I do know deleting it does basically nothing. Delete it or keep it, your choice.