Auto Steps

1. Before starting
   1. Prepare Access File to have any data you want to pull as either a Select Query or Table.
   2. Have SetWarnings > WarningsOn > No as part of you initializing Macro (future Mcr1\_UpdateAccess)
2. Excel File (Extract Data)
   1. File > Save As > Save as type: > Excel Macro-Enabled Workbook (\*.xlsm)
   2. Import Data as Query: Data (Ribbon) > New Query > From Database > From Microsoft Access Database, Select the file, Select the Table or Query, Done one at a time
   3. Select Load or Edit to fix columns
      1. Use Edit to change column names, transform columns, sort by column, etc.
      2. If you select Edit, select Close & Load when you are done
   4. Format Cells to meet data format needs
   5. Data (Ribbon) > Connections > Properties > Deselect Enable background refresh
3. Excel File (VBA)
   1. Developer (Ribbon) > Visual Basic (or Alt+F11) > Tools > References
      1. Select Microsoft Excel 16.0 Object Library
      2. Select Microsoft Outlook 16.0 Object Library
   2. Insert > Module
      1. Copy and paste text from file: Base\_Excel\_Macros.docx
      2. Save (as Module1 is fine)
4. Access File (VBA)
   1. Open VBA (Alt+F11)
      1. Tools > References
         1. Select Microsoft Excel 16.0 Object Library
         2. Select Microsoft Outlook 16.0 Object Library
   2. Insert > Module
      1. Copy and paste text from file: Base\_Access\_Macros.docx
      2. In both functions find the line of code that looks like…
         1. wkbookPath = “……”
         2. Change what is in the quotes to the path of your file.
            1. Holding Shift, Right Click on your Excel file, select Copy as Path, paste this in
   3. Save (as Module1 is fine) and close the VBA window
5. Access File Macros
   1. Call or rename your initialize Macro to “Mcr1\_UpdateAccess”
   2. Create new Macro called “Mcr2\_UpdateExcel”
      1. In Add New Action select RunCode and select Update\_Excel\_Macro()
         1. Make sure to put in the end parenthesis (if you select this from a list it will not do this automatically)
      2. In Add New Action select RunCode and select Format\_Excel\_Macro()
         1. Make sure to put in the end parenthesis (if you select this from a list it will not do this automatically)
   3. Create Macro called “Mcr3\_Close”
      1. Enable Show All Actions
      2. Add New Action select QuitAccess (Options: Save All)
   4. Create Macro called “Mcr0\_Run”
      1. Add New Action: RunMacro, Macro Name: Mcr1\_UpdateAccess
      2. Add New Action: RunMacro, Macro Name: Mcr2\_UpdateExcel
      3. Add New Action: RunMacro, Macro Name: Mcr3\_Close
   5. Save
6. Batch Files
   1. Create a Batch file which will call all the other Batch Files (.bat)
      1. You can create a text file (.txt) and change it to (.bat)
      2. Use the CALL statement followed by the Batch File location to have them run in that order
         1. Can just use batch file name if they are in the same folder
   2. Create a batch file for each Access file that needs to be run
      1. Code:
         1. "C:\Program Files (x86)\Microsoft Office\Office16\MSACCESS.EXE" "File Location" /x Macro\_Name
      2. Example:
         1. "C:\Program Files (x86)\Microsoft Office\Office16\MSACCESS.EXE" "C:\Users\mannami\Desktop\PRONTO\_REPORTS\ACCESS\_FILES\PRONTOPrevDayGP\_RegionalSummary.accdb" /x Mcr0\_Run
7. Auto Email
   1. Create another Batch File to Call the new Access file you will be making
      1. “Email.accdb”
      2. Have this also be called by your original Batch File
   2. In Email.accdb add iterations of the code from the Word Document “Auto-Email\_Macro\_Access.docx” for each email that is intended to be sent
      1. For each one change Send\_Email\_Macro1 to Send\_Email\_Macro2, etc.
   3. Create Excel file “Email.xslm”, the Email.accdb file will now call the Email.xslm file as needed to send the emails you intend
   4. In Email.xslm copy the code from the Word Document “Auto\_Email\_Macro\_Excel.docx”, increment the macro name SendEmail1 to SendEmail2, etc.
      1. For each email change the following pieces of the code as needed
         1. (The Macro name as previously mentioned)
         2. TO
         3. CC
         4. BCC
         5. Subject
         6. Body
         7. Attachments.Add
            1. Can have multiple .Attachments.Add for multiple attachments
8. Task Scheduler
   1. Find the task scheduler app on your PC
   2. Have it call the original Batch file you made
      1. Weekdays, 8:00AM