Promotion Form Automation

1. Introduction:

In this POC, we aim to automate the creation of promotion form(s). We use a python script that takes data from a spread sheet and renders a word document based on the template we have already designed.

2. Process:

We install **docxtpl** using python package management system. Further this package uses 2 major packages:

- python-docx for reading, writing and creating sub documents
- jinja2 for managing tags inserted into the template docx

python-docx-template has been created because python-docx is powerful for creating documents but not for modifying them.

The idea is to begin to create an example of the document you want to generate with Microsoft word, it can be as complex as you want: pictures, index tables, footer, header, variables, anything you can do with word. Then, as you are still editing the document with Microsoft word, you insert jinja2-like tags directly in the document. You save the document as a .docx file (xml format): it will be your .docx template file.

3. Template:

astellas

Promotion Form

System Name: *{{SYSTEM_NAME}}*

System Version: 2.0

Project Name: CHG0049503

Environment: Validation Environment

Signatures

Typed/Printed Name, Title	Signature	Date	Role
{{TYPED_NAME}}, {{TYPED_TITLE}}	See electronic signature page		{{TYPED_ROLE}}

Approved By:

Typed/Printed Name, Title	Signature	Date	Role
{{APPROVER_1_NAME}}, {{APPROVER_1_TITLE }}	See electronic signature page		{{APPROVER_1_R OLE }}
{{APPROVER_2_NAME }}, {{APPROVER_2_TITLE }}	See electronic signature page		{{APPROVER_2_R OLE }}
{{APPROVER_3_NAME }}, {{APPROVER_3_TITLE }}	See electronic signature page		{{APPROVER_3_R OLE}}

4. Generated Form:

astellas

Promotion Form

System Name: *NPrinting*

System Version: 2.0

Project Name: CHG0049503

Environment: Validation Environment

Signatures

Typed/Printed Name, Title	Signature	Date	Role
Sandeep Sharma, Application Manager	See electronic signature page		Operations Manager

Approved By:

Typed/Printed Name, Title	Signature	Date	Role
Dan Plath , Asc Dir Data Vis and Analytics Lead	See electronic signature page		System Owner (for BI front end)
Danijel Popovic, Business information manager	See electronic signature page		IS R
Navya Ramesh, Associate Electronic System QA TDQA	See electronic signature page		Quality Assurance

03-06-2022   Nikhil Kumar

5. Spreadsheet Data:

TYPED_NAME	TYPED_TITLE	TYPED_ROLE
Sandeep Sharma	Application Manager	Operations Manager

SYSTEM_NAME
NPrinting

APPROVER_1_NAME	APPROVER_1_TITLE	APPROVER_1_ROLE
Dan Plath	Asc Dir Data Vis and Analytics Lead	System Owner (for BI front end)

APPROVER_2_NAME	APPROVER_2_TITLE	APPROVER_2_ROLE
Danijel Popovic	Business information manager	IS R&C

APPROVER_3_NAME	APPROVER_3_TITLE	APPROVER_3_ROLE
Navya Ramesh	Associate Electronic System QA TDQA	Quality Assurance

6. Conclusion:

With formatted templates and appropriate data, we can automate and render the promotion forms within minutes, saving redundant manual labour.