VBA Code Documentation – Create Reporting Profile – RCL Library Change Document

This function creates a profile for the user with information about the user, as well as everyone they report to in the RCL change process.

The following fields are returned for each person:

0) M0 number of employee

1) The name of the employee associated with the M0 number.

2) The email address of the employee associated with the M0 number.

3) Are they a Delegate?

4) Are they a Control Owner?

5) Are they a SPOC?

Public Function M0\_Char(Sheet As String, Optional M0\_Number As String = "Retrieve Active Users M0 Number")

Dim D As Worksheet

Dim EC As Range, CS As Range

Dim M0\_Profile()

It is assumed that the number of levels needed to reach a SPOC user will not be greater than 100.

ReDim M0\_Profile(100, 5)

The sheet that the hiearchy data is stored on is passed into the function as a parameter.

Set D = Worksheets(Sheet)

Where the EMP/MGR table begins

Set EC = D.Range("H:H")

Where the CO/SPOC table begins

Set CS = D.Range("A:A")

i = 0

Beginning of the Do...While loop. The condition for stopping the loop is located at the end of the loop.

Do

If i = 0 Then

Enters the M0 number of the user

If M0\_Number = "Retrieve Active Users M0 Number" Then

M0\_Profile(0, 0) = (Environ$("Username"))

Else

M0\_Profile(0, 0) = M0\_Number

End If

'M0\_Profile(0, 0) = "M01834Z" 'Ben Waters <- Test values

'M0\_Profile(0, 0) = "M0184WB" 'Earl Smith <- Test values

Else

Enters the M0 number of the next reported level user

If M0\_Profile(i - 1, 4) = False Then

If the next level is not a control owner, then pull next M0 number from employee/manager table. This process will continue returning manager information up the reporting chain until a control owner is reached. If multiple managers are returned in this process, all of these managers will be CC'd in approval emails generated in the Create\_Notification\_Email module.

M0\_Profile(i, 0) = WorksheetFunction.VLookup(M0\_Profile(i - 1, 0), D.Range(EC.Offset(0, 1), EC.Offset(0, 5)), 4, False)

ElseIf M0\_Profile(i - 1, 4) = True Then

If the next level is a control owner and not a SPOC, then pull next M0 number from Control Owner/SPOC table.

M0\_Profile(i, 0) = WorksheetFunction.VLookup(M0\_Profile(i - 1, 0), D.Range(CS.Offset(0, 1), CS.Offset(0, 5)), 4, False)

End If

End If

Returns the name of the user associated with that M0 number.

M0\_Profile(i, 1) = D.Cells(WorksheetFunction.Match(M0\_Profile(i, 0), EC.Offset(0, 1), 0), EC.Column)

Returns the email address of the user associated with that M0 number.

M0\_Profile(i, 2) = D.Cells(WorksheetFunction.Match(M0\_Profile(i, 0), EC.Offset(0, 1), 0), EC.Column + 2)

Checks to see if the user is a BOKF employee.

If WorksheetFunction.CountIfs(EC.Offset(0, 1), M0\_Profile(i, 0)) > 0 Then

M0\_Profile(i, 3) = True

Else

M0\_Profile(i, 3) = False

End If

Checks to see if the user is a Control Owner

If WorksheetFunction.CountIfs(CS.Offset(0, 1), M0\_Profile(i, 0)) > 0 Then

M0\_Profile(i, 4) = True

Else

M0\_Profile(i, 4) = False

End If

Checks to see if the user is a SPOC

If WorksheetFunction.CountIfs(CS.Offset(0, 4), M0\_Profile(i, 0)) > 0 Then

M0\_Profile(i, 5) = True

Else

M0\_Profile(i, 5) = False

End If

Increment the loop to move to the next reporting level.

i = i + 1

Terminates the process when the information of a SPOC has been recorded or when 100 iterations have been realized (iteration bound used to avoid infinite loops in case columns have been moved or something).

Loop While (M0\_Profile(i - 1, 5) <> True And i < 100)

The intitial M0\_Profile that can handle 100 levels is trimmed down to only the levels actually filled in.

Also, column labels are included in the trimmed down profile variable.

Dim M0\_Profile\_Sized()

ReDim M0\_Profile\_Sized(i, 5)

Copys M0\_Profile information in to the trimmed down profile variable.

For Row = 1 To i

For Column = 0 To 5

M0\_Profile\_Sized(Row, Column) = M0\_Profile(Row - 1, Column)

Next Column

Next Row

Includes a labeling row at the top of the trimmed down variable that describes what each column means.

Labels = Array("M0 Number", "User Name", "Email", "Employee", "Control Owner", "SPOC")

Inserts this labeling into the trimmed down M0\_Profile variable.

For Column = 0 To 5

M0\_Profile\_Sized(0, Column) = Labels(Column)

Next Column

Function returns the new labeled Profile matrix.

M0\_Char = M0\_Profile\_Sized

End Function