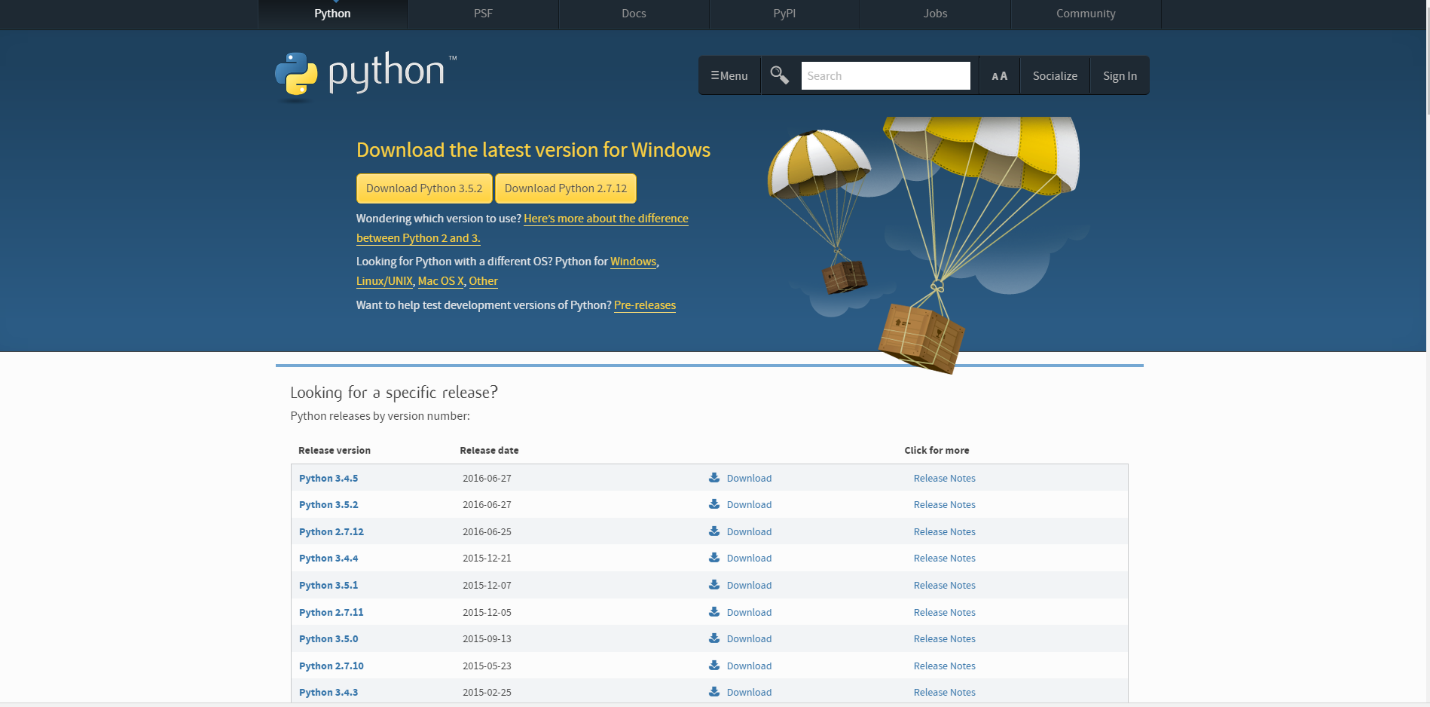
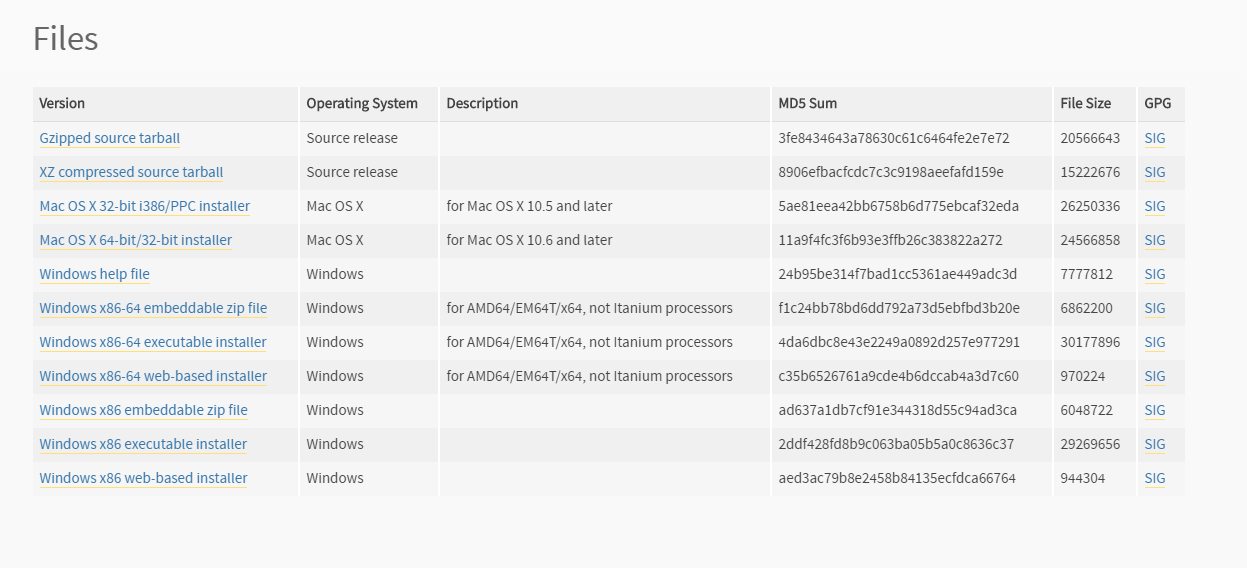
Using Python script to automate the process

This method will save you a lot of time

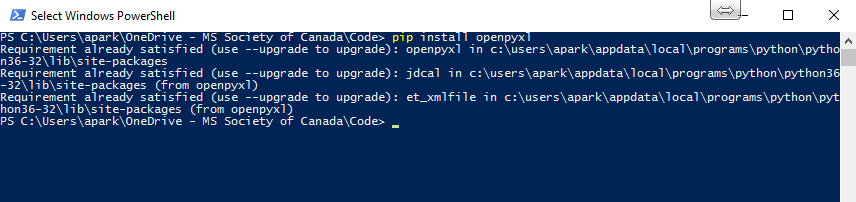
# Download Python3.

If you have Python installed somehow, you will also need to download openpyxl module.

* 1. Go to this website: <https://www.python.org/downloads/>
  2. Pick a version that you like – must be Python 3.\*.\* - do not download python 2. (I will use Python 3.5.2 for this example. Click “Download”. If you scroll down to the bottom, you will see this screen.
  3. Click which ever operating system / bit you’re using. I am using a Windows 64 bit. (Lenovo ThinkPad T540p) **IMPORTANT: Download the web-based installer.** You cannot run .exe files and you will need admin account to do so. If you feel like asking IT, go for it. If not, just download the web-based installer.
  4. Check “Add Python 3.5 to PATH” and click “Install Now” <- **VERY IMPORTANT**
  5. Congratulations! You now have Python installed on your computer!

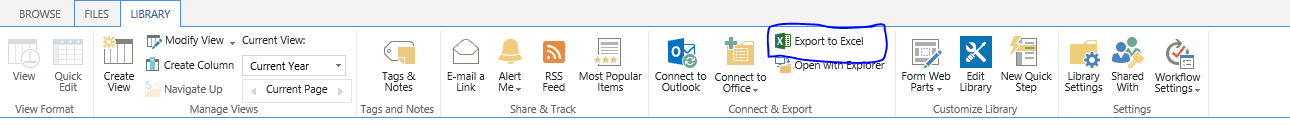
# Installing openpyxl module

* 1. Another thing that your Python program will need to run is a module called “openpyxl”. This will be relatively easy to do since you added Python to the PATH environment.
     1. Open Powershell by searching for Powershell
     2. Type “pip install openpyxl”, press Enter
     3. Done! (I already have it installed so it gave me an error)

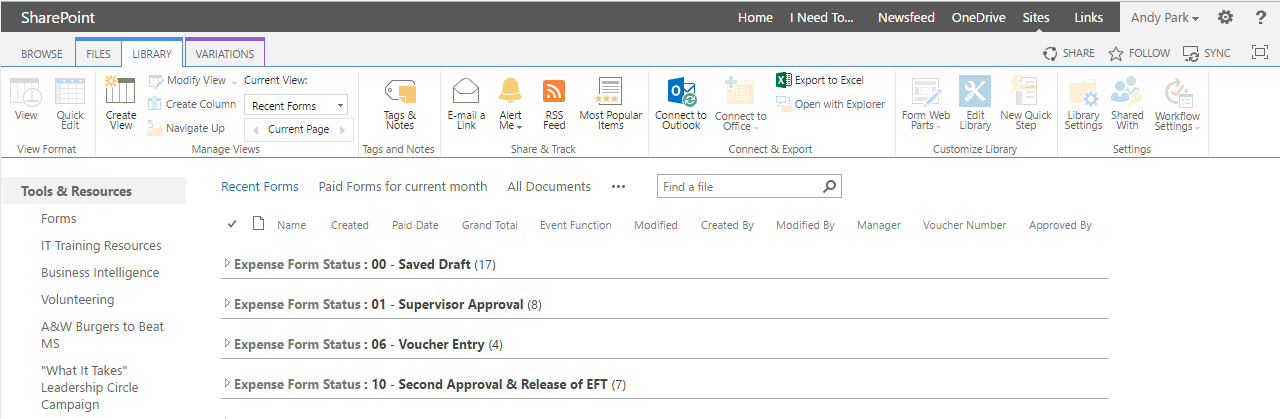


# Download the required excel files.

* 1. If there is a view under the Library that shows Paid Forms for the current month (probably won’t be), export all those documents into an excel spreadsheet. Only use Internet Explorer for this.



* 1. If there is not a view of the Paid Forms for the current month: First, go to the form that you want to extract the data from (Ex. Expense form). Go to Library at the top ribbon -> Create View. Start from an existing view -> All Documents. Create View Name, keep it as Personal View and add the columns **Name, Modified, Created and Approval Date\*** (appear as **Approved By Date** for some forms). Once that is done, scroll down to Filter and choose Show items when column Created *is greater than or equal* to 01/Current Month/Current Year **AND** Expense Form Status *is equal* to “12 – Paid”. (without quotation marks) **AND** Created *is less than* 01/Next Month/Current Year



: Where Library & Create View is located

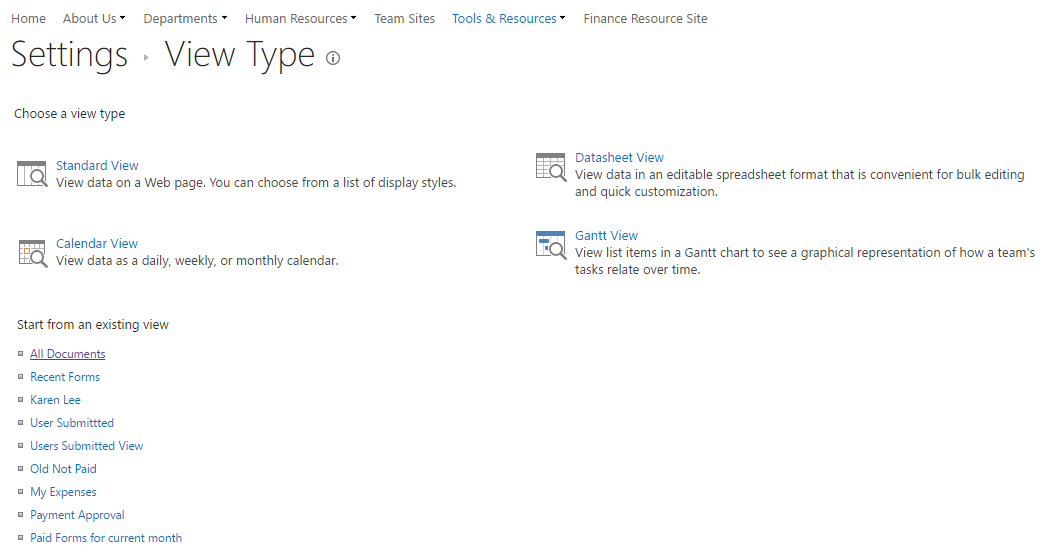


Figure : Start from existing view -> All documents/ you can just pick “Standard View”

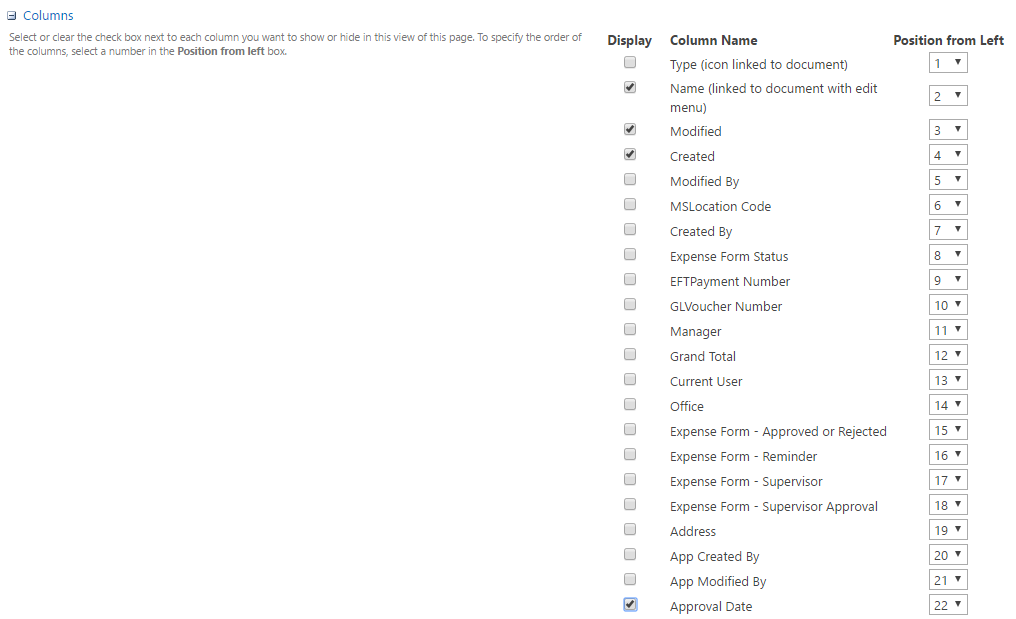


Figure : Which checkboxes to select

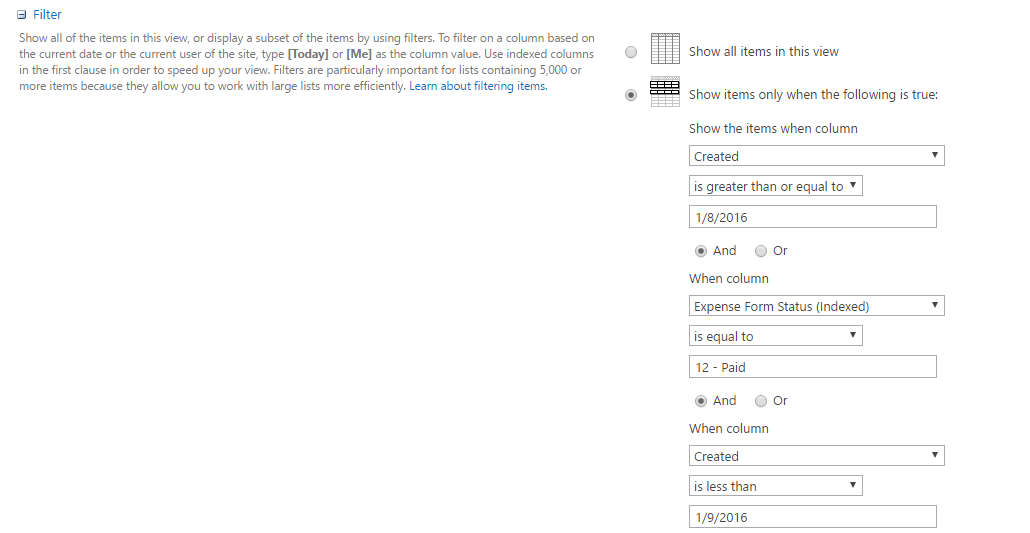
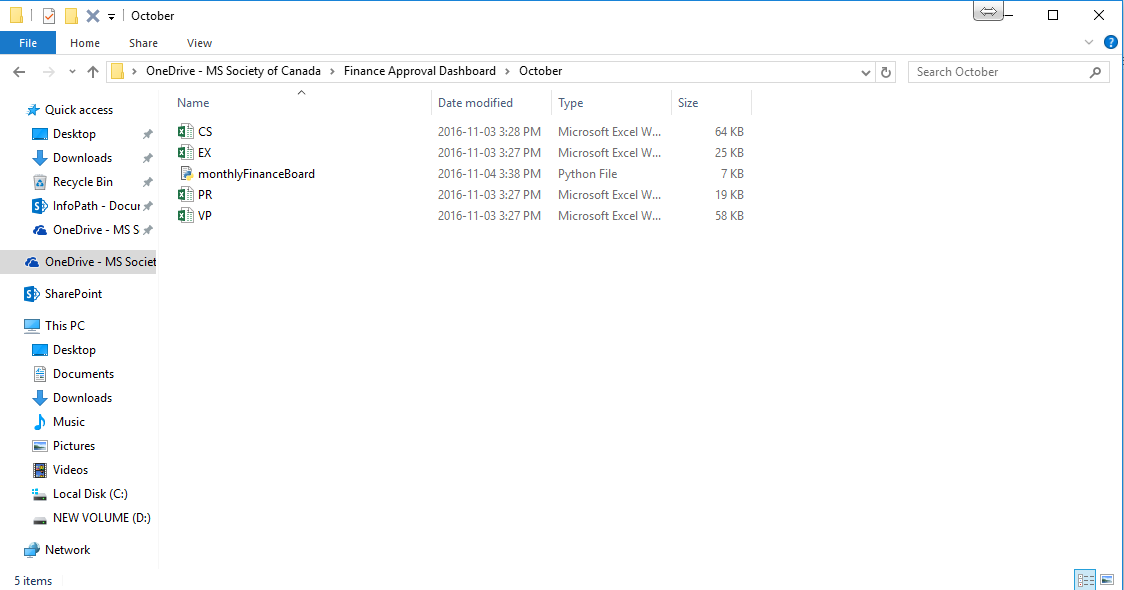
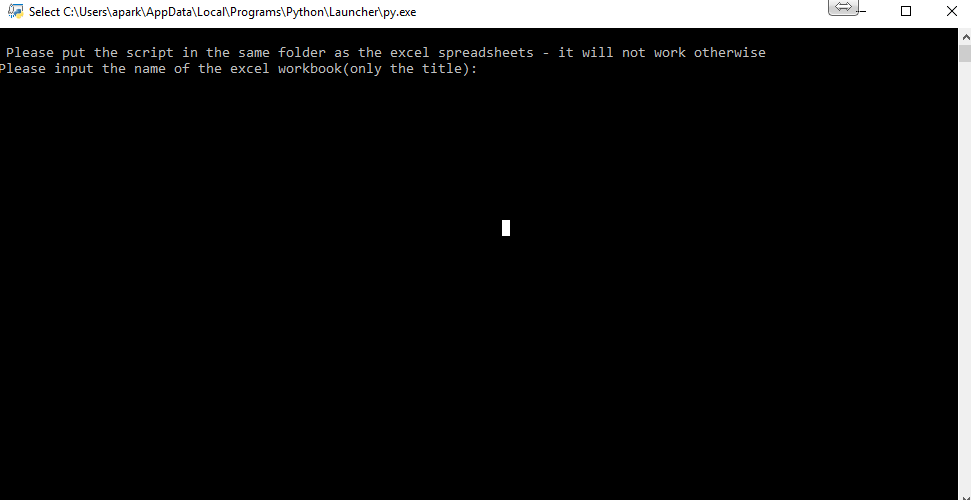
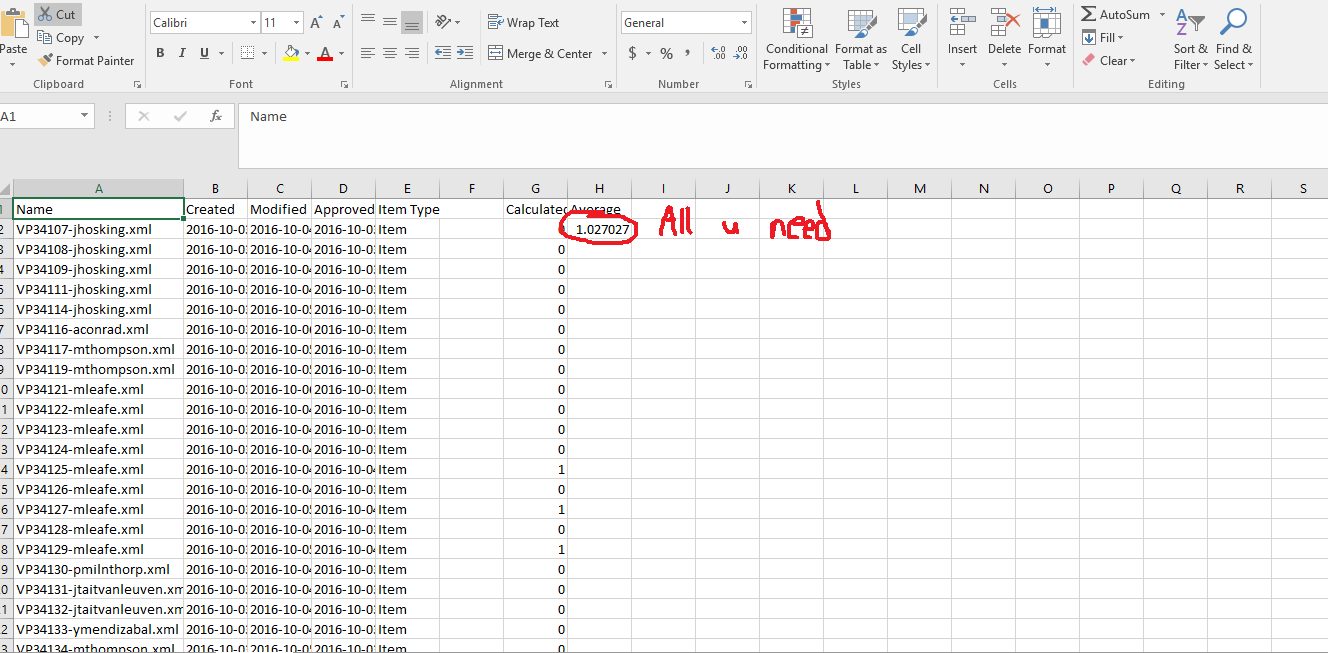


Figure : How to set the rules

* 1. Once the file has been downloaded (easier if you click “Open” then just save as excel document).

# Getting the data from the excel sheets.

* 1. The script will be located within the Code folder in InfoPath shared drive. Feel free to copy it and move it to whatever folder you put the excel files in.
  2. You should see a cute little snake-like file thing called ‘monthlyFinanceBoard.py’ click it and let it run. If the script opens then closes by itself, that probably means there has been an error. Please scroll down and look at the error section for help.
  3. Once you click it, you will see the screen below. **PUT THE NAME OF THE FILE ONLY**. If your file is called “VP.xlsx”, simply type in “VP”. **CASE SENSITIVE**
  4. Once you have done that, type in what kind of form it is. **NUMBERS only**.
  5. Program will then ask for what you want the output file to be. Call it whatever is convenient for you.
  6. The program will ask you to press Enter then exit. In the same folder as your program & inputted excel files, you will see: The finished file called whatever you named it, and a text file called “Number of forms” which has how many entries each form has.



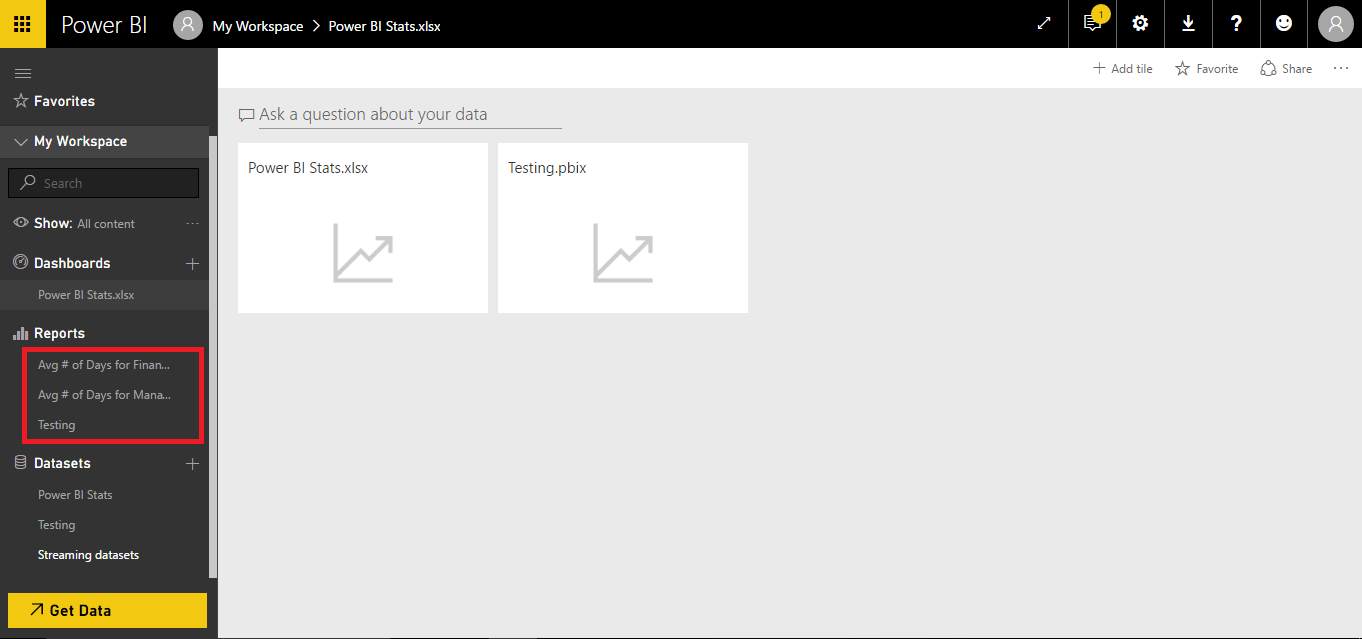
# Data input to Power BI

Data you will need & Should have:

* Finance & Manager Average for Expense, as well as # of forms
* Finance & Manager Average for Vendor Payment, as well as # of forms
* Finance & Manager Average for Payment Requisition Form, as well as # of forms
* Finance & Manager Average for CS Payment form, as well as # of forms
  1. Sign into the Infopath Account and go to its OneDrive
     1. Username: InfoPath
     2. Password: 1nfoP@th
  2. You will find an excel sheet called “Power BI Stats.” Update the cells by writing the name, form, etc.

# How to Edit Power BI sheet itself

1. Go to <https://powerbi.microsoft.com/en-us/>
2. Sign in as InfoPath, shown above
3. Click on ‘Reports’ and select whichever report you want to edit
   1. Pretty intuitive so



# ERRORS:

If you get an error/ the script shuts down while trying to run it, you can troubleshoot it by either:

1. Running the script using PowerShell/ command line
2. (Probably easier if you’re not used to command line) Running the script using the IDLE
   1. Right click the script -> Edit with IDLE -> “Run” on the top -> Run Module
   2. Google whatever error popped up