TOOL MANUAL

TOOL NAME : Outlook Mail from Excel.exe

DOCUMENT VERSION : 02.00

What it does?

This tool uses an email template and some configurations made by the user, to compose an email in Outlook fed with data from spreadsheets in Excel, automatically.

When is it useful?

The tool is useful when you need to send **standard emails** frequently with **data extracted** from a spreadsheet, like:

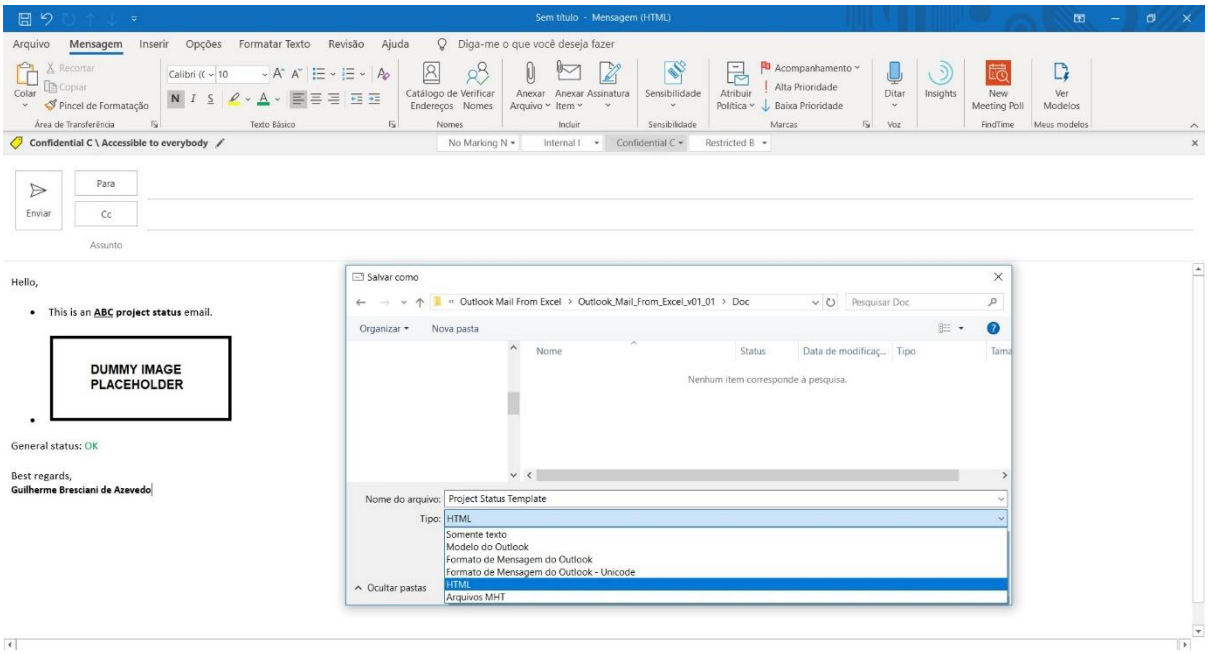
- hour report.
- project status.
- technical definition update.
- update to stakeholders.
- compliance checklist status.

How to use?

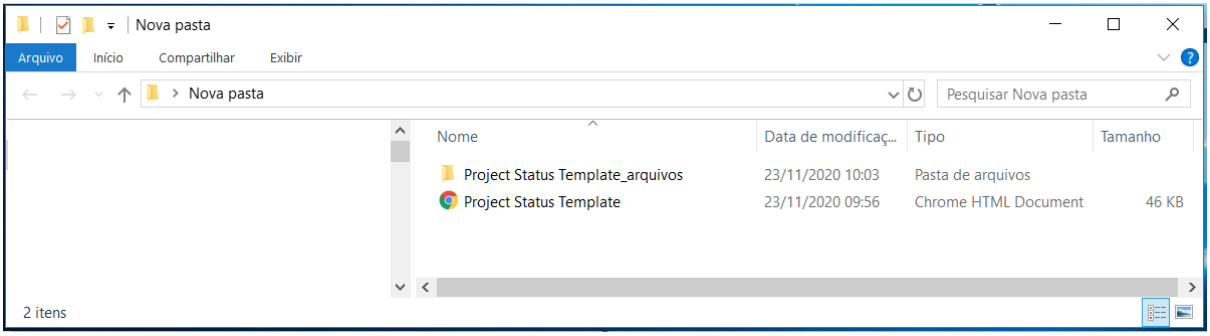
1. Create a standard email. Details to consider:

    - Throughout the email, identify **texts** or **images** that you want to get from the spreadsheet.
    - Leave in the email the texts and images you want to replace with information from the spreadsheet so that you can search for the term to replace later. For example: "This is an ABC project status email". You can search for ABC later, to replace with the code that will define the substitution for the text collected from the spreadsheet.
    - Format the email as you want. Choose fonts, colors, positions and etc.
    - Include your email signature if you want.

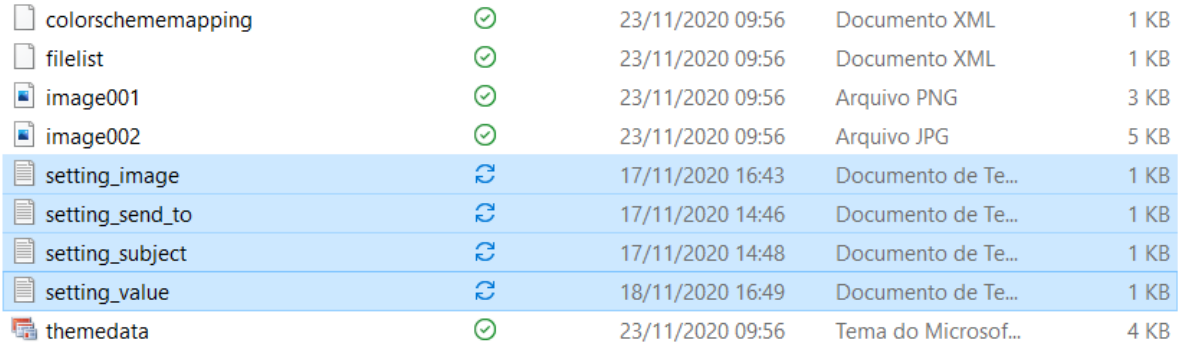
2. Save the email template as HTML.



3. Verify that a file HTML and a folder beginning with the same name was created where you chose to save.



4. Copy the text files "**setting_image.txt**", "**setting_send_to.txt**", "**setting_subject.txt**" and "**setting_values.txt**" from the folder "Email Model Example\Template - Project Comparison_arquivos" that comes together with the software and paste the files inside the folder created with the name of the template HMTL. In the example, the folder "Project Status Template_arquivos".



5. Only if you do not have the settings text files:
   The text files copied will only be used as a guide for formatting the configuration files. If you prefer to create them, keep the files with the same name, use the first line as a header, keep the same column number and the same purposes for each one, separate the columns by tab and the lines by a line break after the last column.

6. Set **frames of tables** and **charts** that you want to insert as an **image** in the email, in the file named "**setting_image.txt**". You can erase the settings from the file you copied, but you must keep the same formatting, like tab-separated columns for example.

   a. Column "Image ID":
      i. Set a name and an extension to the image file. Example: "Frame01.png"

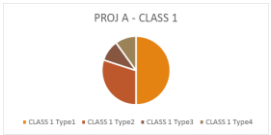
   b. Column "Excel":
      i. Set a number to inform the workbook (Excel .xls file) where the information can be found. Example: if the information is present in the first workbook that you will select when asked for it, set number "1", if the information is in the file named "Project1" you can write part of the name, as "ject1" for example.

   c. Column "Sheet":
      i. Set a number to inform the worksheet where the information can be found inside the Excel file. Example: if the information is present in the first worksheet, set number "1", if the information is in the worksheet named "Planilha2" you can write part of the name, as "anilha2" for example.

   d. Column "Type":
      i. Set "table" if you want to capture a frame of the worksheet as an image.

CLASS 1			
Type1	Type2	Type3	Type4
50,00%	30,00%	10,00%	10,00%
90,00%		TARGET	
100,00%		TOTAL	

      ii. Set "chart" if you want to capture an image of a chart present in the worksheet.



   e. Column "Range/Num":
      i. If "table" type, set a range of cells that should be captured in the image, from the start cell to the end cell, separated by ":". Example: "B13:E17".

	B	C	D	E
13	CLASS 1			
14	Type1	Type2	Type3	Type4
15	50,00%	30,00%	10,00%	10,00%
16	90,00%		TARGET	
17	**100,00%**		TOTAL	

      ii. If "table" type, you can also set 1 cell to be captured, by giving start cell equal as end cell as a range. Example: "N6:N6" will capture N6 cell as image.

	N
6	**A1(1st)**

iii. If “chart” type, set the number of the chart inside the worksheet. Usually charts receives a number related to the order of creation, so the first chart created inside a worksheet will have number “1”, for example.

f. Examples of image setting lines:
   i. projB.png 2 table N6:N6
   ii. class1Ach.png 1 chart 1

7. Set **values of cells** you want to capture and insert as **text** in the email, in the file named “**setting_value.txt**”. You can erase the settings from the file you copied, but you must keep the same formatting, like tab-separated columns for example.

   a. Column “ID tag name”:
      i. Set a name that identifies the information you want to get from the worksheet. Example “ProjectName”. It is not allowed to start with a number or special character. Start this ID name with a letter.

   b. Column “Excel”:
      i. Set a number to inform the workbook (Excel .xls file) where the information can be found. Example: if the information is present in the first workbook that you will select when asked for it, set number “1”, if the information is in the file named “Project1” you can write part of the name, as “ject1” for example.

   c. Column “Sheet”:
      i. Set a number to inform the worksheet where the information can be found inside the Excel file. Example: if the information is present in the first worksheet, set number “1”, if the information is in the worksheet named “Planilha2” you can write part of the name, as “anilha2” for example.

   d. Column “Cell”
      i. Set the location of the cell where the information can be found, giving the column letter followed by the line number. Example: “N6” will get the value of the cell present in the column N and line 6.
      ii. Note that in this case the information you want to collect must always be present in the same cell. For cases where either the row or the column may vary depending on the version of the workbook you are collecting information on, there is a different possibility of filling in the cell location, which you can check in the 'Special Features of Cell Location' chapter in this manual.

   e. Examples of value setting lines:
      i. TypeA 1 N7
      ii. TypeB 2 N7

8. Set a **list of recipient emails** in the file named “**setting_send_to.txt**”. You can erase the settings from the file you copied, but you must keep the same formatting, like one column only with one email on each line for example.

a. Write one email on each line to form an email list that will be automatically composed in the email created. Example: “boss@email.com”
b. You can compose each email listed, with values collected from the list of values defined in the "setting_value" file. To do this, place the ID tag defined in braces (like {ID tag}), where the value taken from the spreadsheet must be. Example: “{BossFullEmail}” or “{BossName}@email.com”

9. Set a **subject text** for the email in the file named “**setting_subject.txt**”. You can erase the settings from the file you copied, but you must keep the same formatting, like one column only, a header and one line only with the subject text.

    a. You can write the text directly or compose the text with values collected from the list of values defined in the "setting_value" file. To do this, place the ID tag defined in braces (like {ID tag}), where the collected value must be inserted. Example: “Status Email for the Project {ProjectName}.”

10. Open the **HTML** file in a **text editor** and edit the code substituting **images** that was inserted in the email model by the images defined in the file “**setting_image**” file and substituting **texts** by the values defined in the “**setting_value**” file. It is important that every link declaration with values (using brackets like “{variable}”) and images (using CID like ““cid:image””) starts and ends on the same line, so do not skip lines in the middle of a declaration.

    a. Find in the HTML code, the location of the image or text you want to insert. For this, you can use the text or images you left as examples during the creation of the template.

    b. To insert a text, substitute the old text you left as example during the creation of the template, by the “ID tag name” you defined in the “setting_value” file between brackets. Example: “{ProjectName}”.
        i. The image below exemplifies the HTML code before the substitution of the text “ABC” for an “ID tag name” related to a project name, declared in the file “setting_value” as “ProjectName”.

```
<ul style='margin-top:0cm' type=disc>
 <li class=MsoListParagraph style='color:black;margin-left:0cm;mso-list:l0 level1 lfo1'><span
     lang=EN-US style='mso-ascii-font-family:Calibri;mso-fareast-font-family:
     "Times New Roman";mso-hansi-font-family:Calibri;mso-bidi-font-family:Calibri;
     mso-ansi-language:EN-US;mso-fareast-language:PT-BR'>This is an <b><u>ABC</u>
     project status</b> email.<o:p></o:p></span></li>
</ul>
```

        ii. The image below exemplifies the HTML code after the substitution of the text “ABC” for an “ID tag name” related to a project name, declared in the file “setting_value” as “ProjectName”.

```
<ul style='margin-top:0cm' type=disc>
 <li class=MsoListParagraph style='color:black;margin-left:0cm;mso-list:l0 level1 lfo1'><span
     lang=EN-US style='mso-ascii-font-family:Calibri;mso-fareast-font-family:
     "Times New Roman";mso-hansi-font-family:Calibri;mso-bidi-font-family:Calibri;
     mso-ansi-language:EN-US;mso-fareast-language:PT-BR'>This is an <b><u>{ProjectName}</u>
     project status</b> email.<o:p></o:p></span></li>
</ul>
```

c. To insert an image, you can completely delete the code that declares an example image you left in the HTML and write the code using the CID as the “ID name” of the image declared in the “setting_image”. Example: “<img src="cid:IDname">”.

i. The image below exemplifies what the code looks like with two images that were left as an example during the creation of the template, separated by a tab. The selected code is an example of <u>old</u> declaration of one image that can be deleted.

```
</v:shapetype><v:shape id="Imagem_x0020_1" o:spid="_x0000_i1034" type="#_x0000_t75"
 alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
 style='width:177.6pt;height:85.2pt;visibility:visible;mso-wrap-style:square'>
 <v:imagedata src="Template%20-%20Project%20Comparison_arquivos/image001.png"
  o:title="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"/>
</v:shape><![endif]--><![if !vml]><img width=237 height=114
src="Template%20-%20Project%20Comparison_arquivos/image002.jpg"
alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
v:shapes="Imagem_x0020_1"><![endif]></span><span lang=EN-US style='mso-ansi-language:
EN-US'><span style='mso-tab-count:1'>              </span><span
style='mso-no-proof:yes'><!--[if gte vml 1]><v:shape id="Imagem_x0020_2"
 o:spid="_x0000_i1033" type="#_x0000_t75" alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
 style='width:177.6pt;height:85.2pt;visibility:visible;mso-wrap-style:square'>
 <v:imagedata src="Template%20-%20Project%20Comparison_arquivos/image001.png"
  o:title="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"/>
</v:shape><![endif]--><![if !vml]><img width=237 height=114
src="Template%20-%20Project%20Comparison_arquivos/image003.jpg"
alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
v:shapes="Imagem_x0020_2"><![endif]></span><o:p></o:p></span></p>
```

ii. The image below exemplifies the <u>new</u> code inserted, substituting the old image declaration by the new, that uses images defined in the “setting_image” file as names “class1A” and “class2A”, maintaining separation by tab.

```
<img src="cid:class1A">

<span style='mso-tab-count:1'>              </span>

<img src="cid:class2A">
```

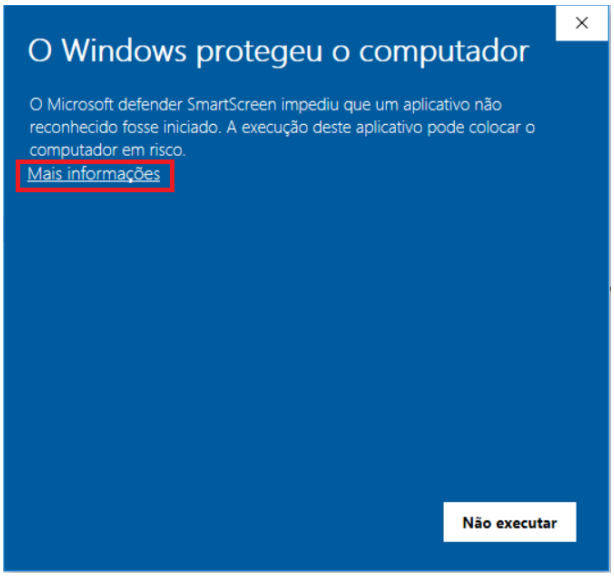
d. To insert an image, you can also maintain the declaration of the example old image to use its properties, like ‘width’ and ‘height’ for example, and substitute only the source property (src) by the CID coded using the name of the image file defined in the “setting_image” file. Example “… <img width=123 heigth =123 src=cid:IDname … >”:

i. The image below exemplifies the substitution of the image source by the new CID coded as names “class1B” and “class2B”, maintaining the properties of the old example image.

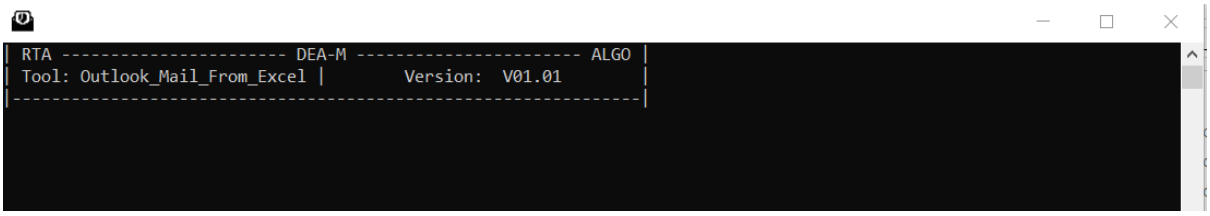
```
<p class=MsoNormal><span lang=EN-US style='mso-ansi-language:EN-US;mso-no-proof:
yes'><!--[if gte vml 1]><v:shape id="Imagem_x0020_3" o:spid="_x0000_i1032"
 type="#_x0000_t75" alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
 style='width:177.6pt;height:85.2pt;visibility:visible;mso-wrap-style:square'>
 <v:imagedata src="cid:class1B"
  o:title="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"/>
</v:shape><![endif]--><![if !vml]><img width=237 height=114
src="cid:class1B"
alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
v:shapes="Imagem_x0020_3"><![endif]></span><span lang=EN-US style='mso-ansi-language:
EN-US'><span style='mso-tab-count:1'>              </span><span
style='mso-no-proof:yes'><!--[if gte vml 1]><v:shape id="Imagem_x0020_4"
 o:spid="_x0000_i1031" type="#_x0000_t75" alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
 style='width:177.6pt;height:85.2pt;visibility:visible;mso-wrap-style:square'>
 <v:imagedata src="cid:class2B"
  o:title="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"/>
</v:shape><![endif]--><![if !vml]><img width=237 height=114
src="cid:class2B"
alt="Uma imagem contendo Texto&#10;&#10;Descrição gerada automaticamente"
v:shapes="Imagem_x0020_4"><![endif]></span><o:p></o:p></span></p>
```

11. With your **Outlook application opened and logged**, execute the tool “**Outlook Mail From Excel.exe**”. It is possible that a Windows dialog appears indicating that you do not recognize

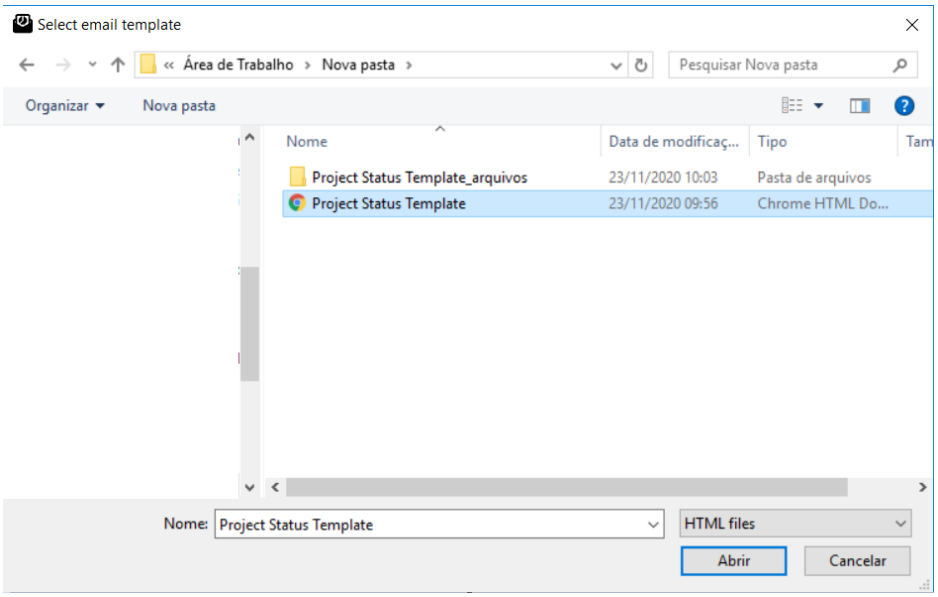
the manufacturer of the software and you will have to click on ‘more information’ in order to run the program.



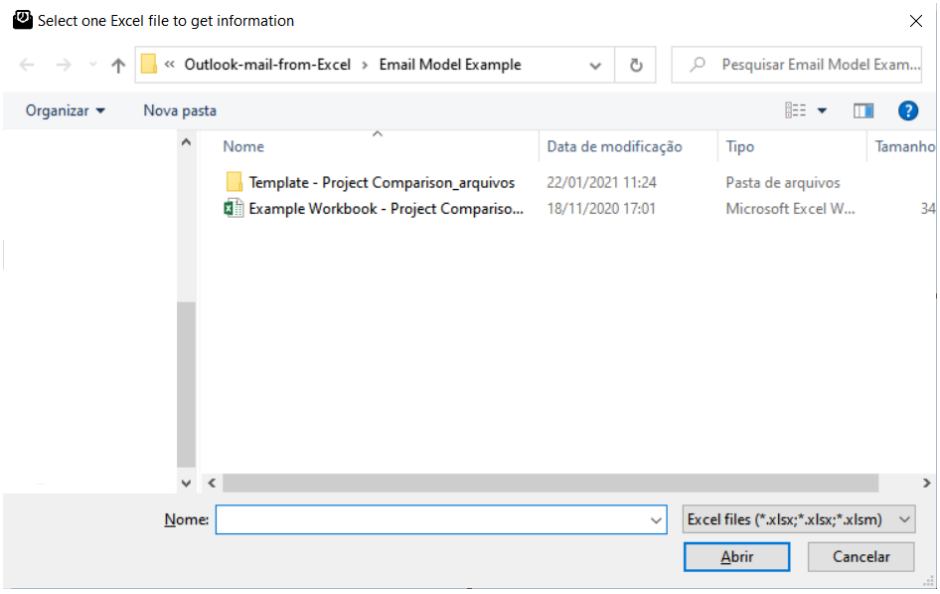
12. A software **execution window** will open to provide any feedback needed by the user during operation. The window **closes automatically** after the software has finished running.



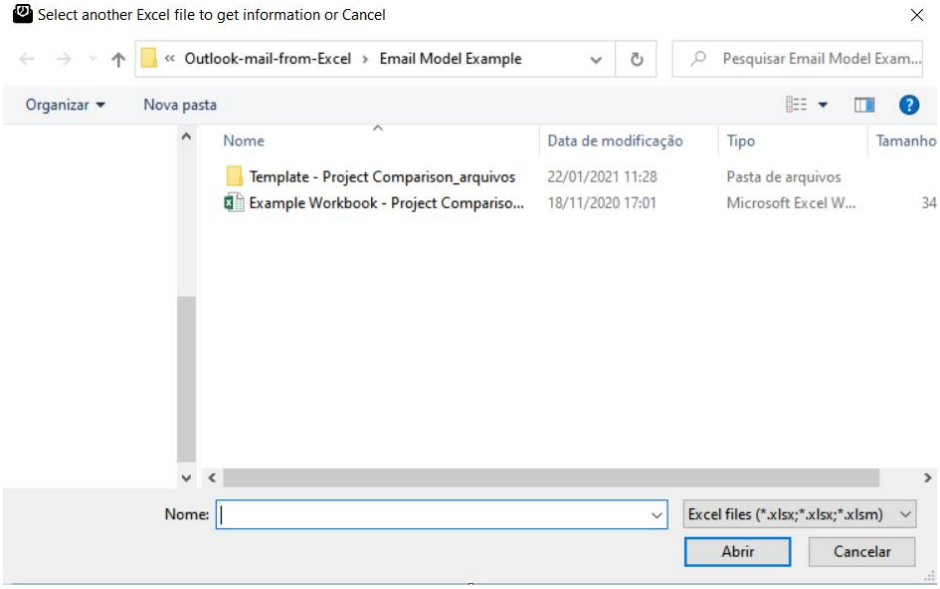
13. A window will open asking for an **email template**. Select the **HTML file**.



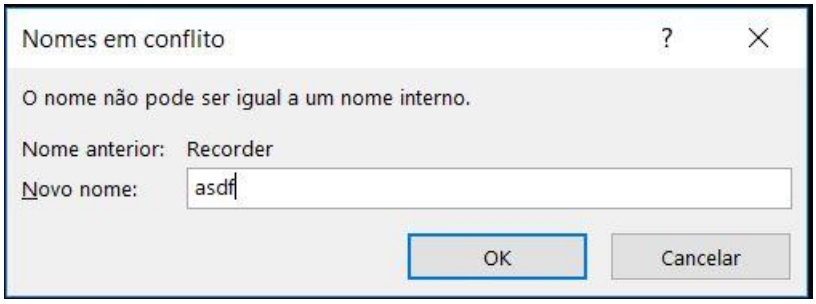
14. A window will open asking for an **Excel file**. Select one Excel workbook you want to **get information from**.



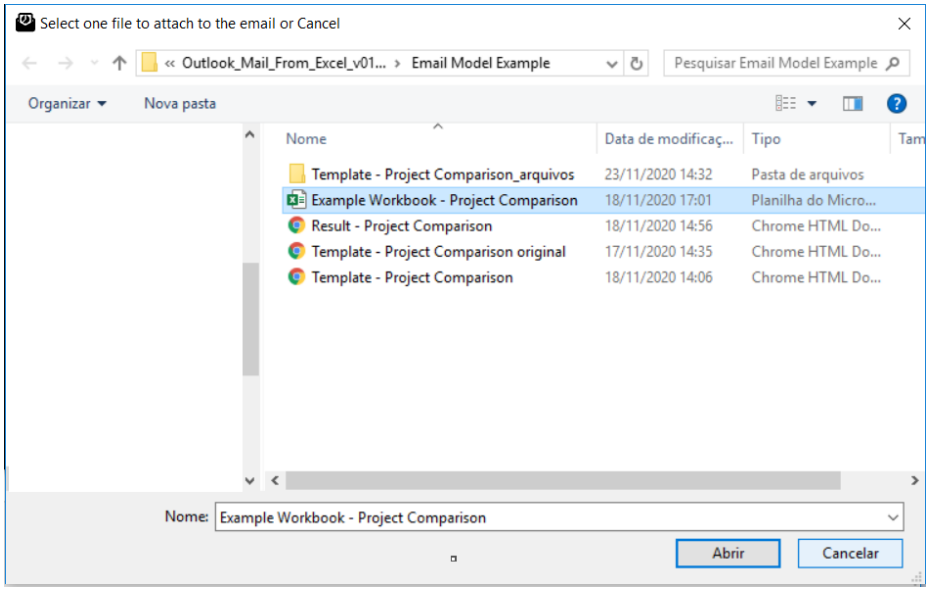
15. A window will open asking for another **Excel file**. Select more Excel workbooks if you want, or Cancel to use only the first Excel file selected before.



16. In some cases, depending on the workbook used, is possible that a dialog from Excel opens informing that there is a name conflict. You can enter any name and click OK. This should not affect your spreadsheet at all. After entering a name, the spreadsheet will open and you should not click or touch it in any way, it will soon close itself at the end of the acquisition of the information you defined.



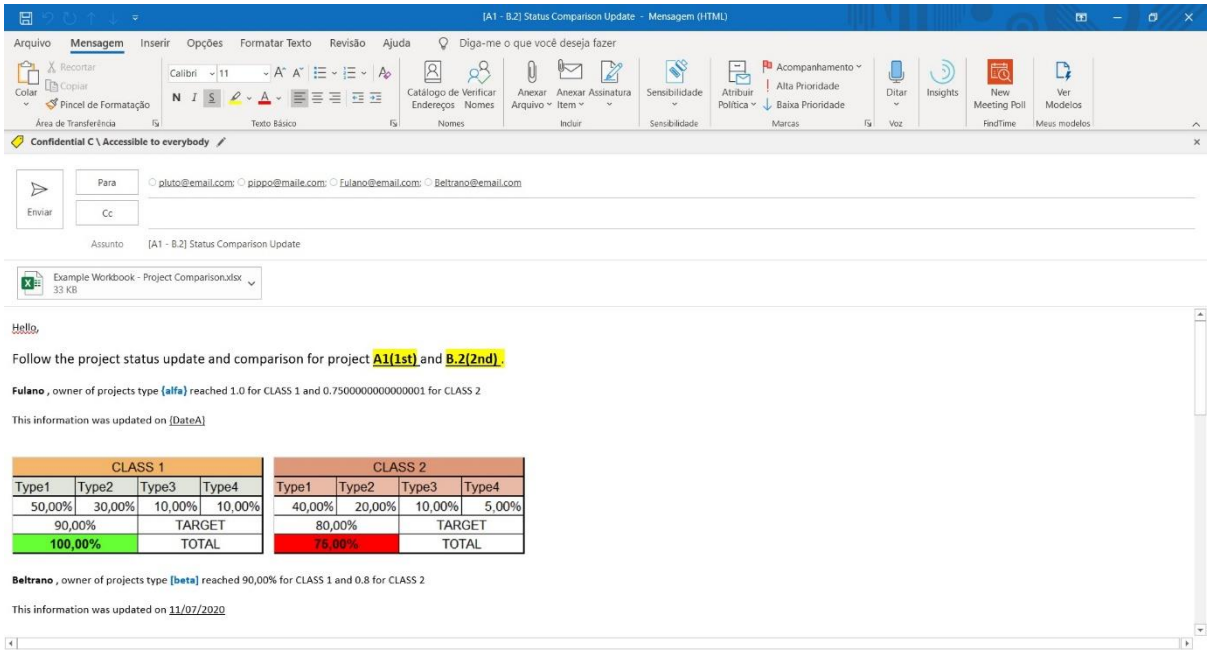
17. A window will open asking for **attachment files**. If you want to add a file as attachment in the email, select the file and click “Open”. If you selected a file, another window will open, asking for more files to attach if you want. If you do not want to add anymore files, click “Cancel” or close the dialog. You will be able to attach more files if you want before to send the email.



18. Finally, the software will close its execution window, and a window with a **new email** should appear in Outlook, with the email **composed with information from the spreadsheet** that you configured.

Result?

If all goes well, a new window will open in your Outlook with a new email composed of text and image information collected from the Excel spreadsheet as configured. The email is not sent automatically so that you can review it or finish writing your specifics before sending it.



Special Feature of Cell location

Whenever it is necessary to point a cell in the configuration text files (“setting_value.txt” or “setting_image.txt”), you can indicate the cell directly as “B2” for example, or write a **search logic** for the cell, which can be used in cases where either the line or the column are uncertain.

In case you want to search for a column, you must replace the letter indicating the column, such as ‘B’ in the case of cell example “B2”, with the search logic. In the case where you want to search for a line, you must replace the number that indicates the line, such as ‘2’ in the case of cell example “B2”, with the search logic.

The logic must be written in **parentheses** and **5 parameters** must be passed, **separated by semicolon** “**;**” so you can run the search.

Example of how to write the location of a cell in cases where you want to search for an uncertain column cell with line 2: “**(parameter1; parameter2; parameter3; parameter4; parameter5)2**”.
Example of how to write the location of a cell in cases where you want to search for a cell in column B with an uncertain line: “**B(parameter1; parameter2; parameter3; parameter4; parameter5**)”.

When **looking for a column**, you must enter a row for the software to evaluate the values and compare with a value you have indicated. When successful in the comparison, the software applies an offset also indicated by you, and starts to use the column that was defined from this **search for a value through a row plus the offset**.
When **looking for a row**, you must enter a column for the software to evaluate the values and compare with a value you have indicated. When successful in the comparison, the software applies an offset also indicated by you, and starts to use the line that was defined from this **search for a value through a column plus the offset**.

The possibilities for parameters are as follows:

1. Parameter 1 – **Column/Row to be traversed**.
    a. When looking for a column, indicate a line to be traversed like '2' for example. When looking for a row, indicate a column to be traversed, such as ‘B’ for example.
    b. Example in filling in the search formula:
        i. (2;parameter2;parameter3;parameter4;parameter5)2
        ii. B(B;parameter2;parameter3;parameter4;parameter5)

2. Parameter 2 – **Comparison to be done**.
    a. The possibilities of comparison are:
        i. “==” that means “equal than”.
        ii. “!=” or “<>” that means “different than”.
    b. Example in filling in the search formula:
        i. (2;==;parameter3;parameter4;parameter5)2
        ii. B(B;!=;parameter3;parameter4;parameter5)

3. Parameter 3 – **Cell value to be compared with**.
    a. The type of the comparison was set by the parameter 2, to be compared with whatever is written in parameter 3. So, the parameter 3 contains the complete content of the cell you want to check if it is equal or different, according to parameter 2.
    b. Beware of cells that contain formatted values. It is common cases in which the value that appears inside the excel cell is 90% for example, but the actual value of the cell's content is 0.9, and the cell is only formatted so that it appears in percentage.
    c. Keep in mind that you are looking for content that will make you sure that, from this column or row, you know exactly where the cell you need is.
    d. Example in filling in the search formula:
        i. (2;==;Project Name: ;parameter4;parameter5)2
        ii. B(B;!=;example of a cell content;parameter4;parameter5)

4. Parameter 4 – **Offset signal**.
    a. From a column/row that matched by de comparison defined by parameters 2 and 3, you can take some column/row before or after that.
    b. The possibilities of offset signal are:
        i. “+” that takes a column/row after the cell matched by the comparison.
        ii. “-” that takes a column/row before the cell matched by the comparison.
    c. Example in filling in the search formula:
        i. (2;==;Project Name: ;+;parameter5)2
        ii. B(B;!=;example of a cell content;-;parameter5)

5. Parameter 5 – **Offset quantity**.
    a. From a column/row that matched by de comparison defined by parameters 2 and 3, the parameter 5 define how many columns/rows after or before, depending on parameter 4, the software will find the cell location.
    b. The possibilities of offset quantity are any integer number. Example “1”, “2”, “3”.
    c. Example in filling in the search formula:
        i. (2;==;Project Name: ;+;1)2
        ii. B(B;!=;example of a cell content;-;5)

Both when the location of a cell is passed directly (like “B2” or when a search logic is passed to a column (like “(2;==;Project Name: ;+;1)2”) or row (like “B(B;!=;example of a cell content;-;5)”), and the search is unsuccessful in finding the cell, the necessary information will be informed in the software application window to the user's knowledge.

```
WARNING : Value not found for Cell in setup 'DateA      1       N8' !
```

Special Feature of Set Values Manually

The files responsible for **configuring the collection of information** in the spreadsheet are “**setting_image.txt**” and “**setting_value.txt**”. At first, all the logic of functioning is idealized so that the user creates these files once and does not need to configure anything to use the software to his benefit, repeatedly, with different spreadsheets.

However, in some particulate cases, it may be necessary **adjustments** to be made **due to** the differences that may have two **different spreadsheet instances**. To solve cases like this, the user can **set values manually** during the execution of the software, which will be automatically replaced not only in the **HTML** files, "**setting_subject**" and "**setting_send_to**", as it happens for the collected values automatically defined in the file "setting_value", but these manually applied values will also be applied to the "**setting_image**" and "**setting_value**" files.

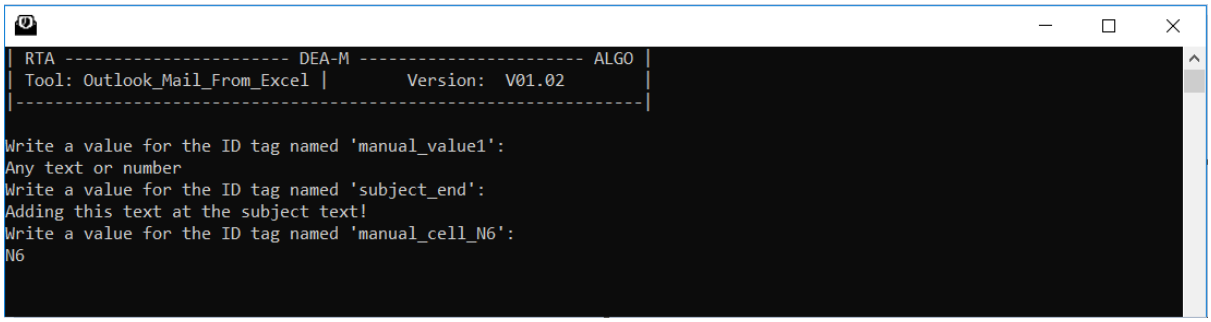
How to use:

1. To set the values manually, copy the file “**setting_value_manually.txt**” from the folder “Email Model Example\Template - Project Comparison_arquivos” that comes together with the software and paste the files inside the folder created with the name of the template HMTL.

2. In this file, only IDs will be defined. Therefore, one per line, skipping the first header line, set the ID to the values you intend to set manually, to be applied to all other files.

3. To use the values referring to these IDs in any of the other configuration files, do the same as the IDs defined in the "setting_value" file, that is, write the name of the ID in braces, such as “{IDname}”.

4. When running the software, it will ask for the value you want to set during the current run, ID by ID. Write the value for the indicated ID and press ‘Enter’.



5. Finally, follow the normal procedure. The software will apply the values you setted for the actual execution to the files as soon as the files are read.

Usage restrictions:

- It has not been tested and is not recommended to use the tool in folders in a network environment with documents for community use. The tool was created to be used locally, so it is recommended to download the files on the user's workstation, as well as run the copied tool on the user's workstation.

Additional Information:

In case of doubts and problems contact https://github.com/guilherme-b-azevedo