



Microsoft Word Operations

Readme

Version 1.0

13/05/2020

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1. Introduction

This document contains all essential information for the user to make full use of the Bot - Microsoft Word Operations. This manual includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

Description - Bot performs Set/Get functions on Microsoft word file. It extracts Content/Legacy controls data to a text file OR Sets values from input parameters to Content/Legacy controls fields of a Word Document

Input for Set Function - Word File Path, Parameters with values to be entered

Input for Get Function - Word File Path

Use Case - The task of extracting values or entering values from Content/ Legacy controls of a Word document is performed manually by a user, this is a manual intensive and error prone activity. The Automation Anywhere BOT solution performs the activity which a manual user would and helps improves the efficiency and accuracy of the process

Set Content – Input File with Values to be Set at Content Controls of a given Word File

Name	Value
WordFilePath	Automation Anywhere\MyTasks\Bot Store\Word_LegacyControlAndContentControl-CitiusTech\Output Folder\Sample_Patient_Information_Form ContentControls.docx
PatientName	Robert D'Cunha
Intake Number ID	12342
Payer	ABCD
MemberID	123
DX	156
HCPC/CPT Code	CP1281
Number of Units	1
Last Day of Coverage	2/3/2020
Date NOMNC Issued	3/3/2020
Male	<input type="checkbox"/>
OrderingPhysicianAdi	3 Mayfair Drive Deerfield, IL 60015
RenderingAddress	26 Somerset St. Hackettstown, NJ 07840

Get Content – Input Word File with Data filled in Content Controls

Health Check Information

Patient Name: Robert D'Cunha		Intake Number Authorization ID: 12342
Payer: ABCD	Member ID: 123	DX: 156
HCPC/CPT Code(s): CP1281		Number of Units: 1
Last Day of Coverage: 2/3/2020		Date NOMNC Issued: 3/3/2020
Gender: M <input type="checkbox"/> F <input type="checkbox"/>	Prior Functional Status:	
Ordering Physician Name and Address: 3 Mayfair Drive Deerfield, IL 60015		
Rendering Provider Name and Address: 26 Somerset St. Hackettstown, NJ 07840		

Set Content – Output Word File

Health Check Information

Patient Name: Robert D'Cunha		Intake Number Authorization ID: 12342
Payer: ABCD	Member ID: 123	DX: 156
HCPC/CPT Code(s): CP1281		Number of Units: 1
Last Day of Coverage: 2/3/2020		Date NOMNC Issued: 3/3/2020
Gender: M <input type="checkbox"/> F <input type="checkbox"/>	Prior Functional Status:	
Ordering Physician Name and Address: 3 Mayfair Drive Deerfield, IL 60015		
Rendering Provider Name and Address: 26 Somerset St. Hackettstown, NJ 07840		

Get Content – Output Text File

```

GetContent7_2151.txt - Notepad
File Edit Format View Help
Robert D'Cunha
12342
ABCD
123
156
CP1281
1
2/3/2020
3/3/2020
CheckBox Value is Male
3 Mayfair Drive Deerfield, IL 60015
26 Somerset St. Hackettstown, NJ 07840
    
```

1.2 Common Use cases

Any process using Microsoft Word documents with Content/ Legacy controls.

2. Requirements & Prerequisites

2.1 System Requirements

- Not Applicable

2.2 Prerequisites

- Automation Anywhere Enterprise v11 or above.
- Microsoft Word

2.3 Security Measures

- Not Applicable

2.4 Disclaimers

- Not Applicable

3. Getting Started

3.1 Skill Matrix

Instruction: Its one Metabot with functions to perform various functions

3.2 Installation Hierarchy

<AA Directory>

- My Tasks
 - Microsoft Word Operations - CitiusTech (Folder)
 - Error Folder
 - Logs (Folder)
 - Error Logs Month-Day-Year.txt
 - Snapshots (Folder)
 - Error Snap Month-Day-Year HoumMinuteSecond.png
 - Input Folder
 - Output Folder
 - Sample_Patient_Information_Form ContentControls.docx
 - Sample_Patient_Information_Form_LegacyControls.docx
 - My MetaBots
 - WordAutomationMetabots.mbot



3.3 Quick Start

3.3.1 Setup

User would need to run the installation file (Microsoft Word Operations.msi)

3.3.2 Configuration

Configurable variable list with the details as mentioned in the example

Input Variables			
Parameter Name	Type	Direction	Additional Info
vBookmarkname	String	Input	Provide the bookmark name, created in word document.
vValue	String	Input	Provide the text to add in word document.
vDocumentPath	String	Input	<p>Provide the path of the respective word document with extension in the config file.</p> <p>Reference -</p> <ul style="list-style-type: none"> \$AAApplicationPath\$\Automation Anywhere\My Tasks\Microsoft Word Operations-CitiusTech\Output Folder \Sample_Patient_Information_Form ContentControls.docx  Sample_Patient_Information_Form Cor \$AAApplicationPath\$\Automation Anywhere\My Tasks\Microsoft Word Operations-CitiusTech\Output Folder \Sample_Patient_Information_Form LegacyControls.docx  Sample_Patient_Information_Form_Leg

Output Variables			
Parameter Name	Type	Direction	Additional Info
vOutput	String	Output	If the operation was successful, then its value will be "Success". If the operation failed, then its value will be "[ERROR]:<error description>"
vLogFolder	String	Output	This folder contains Log file in case of error (Already defined, no need to add value unless want to change location of file).
vErrorFolder	String	Output	This is error folder inside bot folder which contains Logs and Snapshots folder (Already defined, no need to add value unless want to change location of file).
vSnapshotFolder	String	Output	This folder contains Screenshot in case of error (Already defined, no need to add value unless want to change location of file).

3.3.3 Metabot Functions

<i>Function</i>	<i>Inputs</i>	<i>Outputs</i>	<i>Comments</i>
GetTextContentControls	String – Path String – ContentTitle	String – Success / Error	Gets ContentTitle from existing Word document and displays it in a message box.
SetTextContentControls	String – Path String – ContentTitle String – Text	String – Success / Error	Gets ContentTitle from existing Word document and Writes the value in Text to the Text Content Control field.
GetCheckBox	String – Path String – ContentTitle	String – Success / Error	Gets ContentTitle from existing Word document and displays the checked checkbox item
Set_CheckBox	String – Path String – ContentTitle	String – Success / Error	Gets ContentTitle from existing Word document and checks the checkbox.
GetDate	String – Path String – ContentTitle	String – Success / Error	Gets ContentTitle from existing Word document and displays the date value
Set_Date	String – Path String – ContentTitle String - Date	String – Success / Error	Gets ContentTitle from existing Word document and sets the date in Date Content Control field.
GetDropDownOrTextLegacyControls	String – Path String – BookmarkName	String – Success / Error	Gets BookmarkName from existing Word document and displays the dropdown value or text field value correspondingly from a drop down or a text field.
SetDropDownLegacyControls	String – Path String – BookmarkName Int - DropdownListNumber	String – Success / Error	Gets BookmarkName from existing Word document and Selects the value in the dropdown list depending on its order in dropdown list
SetTextLegacyControls	String – Path String – BookmarkName String - Text	String – Success / Error	Gets BookmarkName from existing Word document and Writes the value in Text to the LegacyContent Control field.
GetCheckBoxLegacyControls	String – Path String – BookmarkName	String – Success / Error	Gets BookmarkName from existing Word document and displays whether the checkbox is checked or unchecked.

SetCheckBoxLegacyControls	String – Path String – BookmarkName	String – Success / Error	Gets BookmarkName from existing Word document and checks the checkbox.
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4. Reports

Not Applicable

5. Logs

User can include logging in their Task Bot from Where this Metabot shall be invoked.

6. Troubleshooting & Support

6.1 Support

Not Applicable

6.2 FAQs

What are Content Controls?

Content Controls are individual customized controls in templates, forms, and documents. For example, forms with a drop-down list control that provides a restricted set of choices for the user of the form.

What are Legacy Controls?

Legacy Controls are customized field controls that were available in earlier versions of Word (Word 97–2003 format). Legacy form fields are accessible from the Legacy Tools button's menu in the Controls group on the Developer tab

How to add Content Controls on a Word Document

View the Developer tab to add or change content controls

1. Click File > Options > Customize Ribbon.
2. In the list of tabs under Customize the Ribbon, select the Developer box and then click OK.
3. Do one of the following:
 - To add a control, click in the document where you want to add it, and then click the control you want to add on the Design tab.
 - To set properties on a control or change an existing control, on the Developer tab, in the Controls group, click Properties.

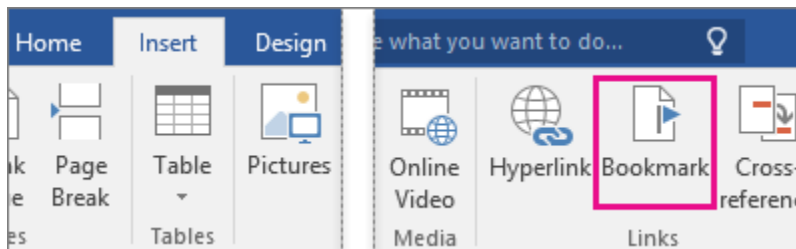
How to add Legacy Controls on a Word Document

To insert any legacy field, follow these steps:

1. Position the insertion point where you want the field.
2. On the Developer tab, make sure Design Mode is selected.
3. In the Controls group, click the Legacy Tools button. Its palette of tools appears.
4. Click the desired field type.

How to create Bookmarks on a Word Document

1. Select text, a picture, or a place in your document where you want to insert a bookmark.
2. Click **Insert > Bookmark**.



3. Under Bookmark name, type a name and click Add.
4. Note: Bookmark names need to begin with a letter. They can include both numbers and letters, but not spaces. If you need to separate words, you can use an underscore (_)—for example, First_heading.

Appendix A: Record of Changes

Instructions: Provide information on the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.

No.	Version Number	Date of Change	Author	Notes
1	1.1	12/05/2020	Akriti Mahapatra	

Appendix B: Acronyms

*Instructions: Provide a list of acronyms and relative description used within the document.
Sequence should be alphabetical*

No.	Acronym	Description

Appendix C: References

No.	Topic	Reference Link