

Automating Microsoft Word & Excel (2007)

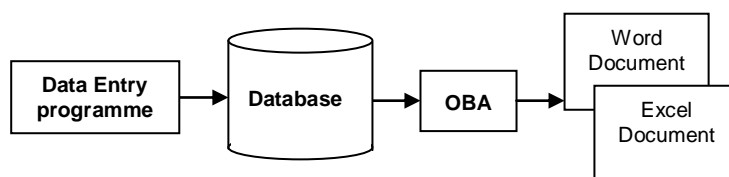
by Samten J. Nagarajan, Solutions Architect, RJ Info Matrix

Over the past year Microsoft has incorporated new features in key programmes that make it possible to create document automation solutions based on Microsoft Office (Word, Excel, etc.) called **Office Business Applications** (OBA).

Documents created in Microsoft Word/Excel are often the life-blood of the organization—letters, quotes, reports, Excel models of various aspects of the business, etc. Yet, these documents are often created and managed in haphazard ways.

- ❖ Documents are stored in numerous locations with no consistent conventions for naming the documents and the folders they are stored in. This makes finding documents later on frustrating. This also leaves backup of critical company info in the hands of numerous, frequently inexperienced, users.
- ❖ The ad-hoc ‘automation’ commonly used is to base a new document on an existing document and then to modify the new document as necessary. If the document contains information from a company database, some form of copy/paste is used to enter the data. This ‘automation’ method leads to numerous errors:
 - Not all necessary changes are found and modified; for example, the old ‘Company Name’ may still be lurking in the new document.
 - There are often incomplete or duplicate sentences/paragraphs due to copy/paste errors.
 - Because a variety of documents may be used as the ‘source’ document, spelling and grammar mistakes tend to be propagated! Moreover, the documents manifest a variety of styles.
 - Since data is typed directly into the document numerous inconsistencies creep into the document; for example, the client’s name may be spelled differently in different places in the document.
- ❖ Data entered in a document is ‘unstructured’; that is, it cannot be analyzed later—selected and sorted to create summary reports.

In contrast, an **Office Business Application** not only speeds up the process of creating documents but also improves their content, format, and storage.



- ❖ Data is entered in a database. This brings a number of benefits. You now can:
 - **validate the data** that is entered to prevent errors,
 - **prevent duplicate** entries,
 - **generate analytical reports** on the data, and
 - **centralize backup**/restore of critical company info.
- ❖ Documents are based on **templates** that take full advantage of all the advanced features of Office 2007
 - Word 2007—content controls, building blocks, styles, etc.,
 - Excel 2007—named ranges, audited formulas, pivot tables, etc.
 As a result documents are **consistent** in terms of:
 - **content**—language and wording of the document is standardized and correct and you need not worry about grammar or spelling,
 - **format**—thereby creating a professional, consistent look
- ❖ You can **incorporate data** from your company databases—line-of-business, HR, CRM, etc.
- ❖ You can **protect the document** from unintended/unwanted deletions or additions.
- ❖ Documents are **automatically saved** to a predefined folder and given consistent names. Finding documents later is fast and easy.
- ❖ Any business process involving Excel models that is repetitive, involves multiple complicated steps, and is time consuming can be **automated**.
- ❖ Automated solutions bring these advantages to **all staff** whether they are power users or novices. You **save time** on training or relying on a few power-users.

In the next few months we will look at specific OBA solutions for:

- An Engineering Firm—this OBA generates an inspection report rich in graphics, tables, and style,
- A Law Office—this OBA shows how the same data can be used to generate multiple letters and forms,
- An Accounting Firm—this OBA automates creating monthly financial statements using data imported from Tally.

For further information and flash demos please visit www.ramjaya.com or contact Nishanth at 9740808440