

VBA SOURCE CODE BOOK

DOCUMENT WORKFLOW MANAGER

DOCUMENT WORKFLOW MANAGER

Document Name: Invoice 7-Check | Originator: Tammy Snyder | Workflow Type: Sales Order

Requested On: 1/24/2021 | Original Filename: Invoice_6_01-08-2021.pdf

Requested Details: Check Invoice #7 for any issues

Current Reviewer: Lisa Mathews | Revision Upload

Reviewed On	Reviewer	Status
10/29/21 7:38 PM	Larry Daniels	Approved
10/29/21 7:05 PM	Tim Simmons	Rejected
10/30/21 6:01 AM	Larry Daniels	Pending Review
10/30/21 10:44 AM	Anita Withers	Approved
10/30/21 9:36 AM	Larry Daniels	Pending Review
10/30/21 10:17 AM	Larry Daniels	Pending Review
10/30/21 3:39 PM	Lisa Mathews	Pending Review

SEL. FLOW SUPERVISOR->	Tammy Snyder	Graham Perkins	Jimmy James	Larry Daniels	Anita Withers	Lisa Mathews	Mark Mason	Dave Davidson
WORKFLOW TYPES	Office Staff	Team Leader	Office Manager	Supervisor	Regional Manager	General Manager	Chief Executive	Vice President
Time Off	2							
Sales Order	9							
Work Order	2							
Expense < \$1000	2							
Expense >= \$1000	2							
Project Bid								
Invoice	Invoice7-Request		Invoice7-Request	Sales Quote 101		Sales Update	Confirmation check	Inv. 3...

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by: *Randy Austin*

ABOUT THE AUTHOR

A two-time Microsoft MVP & lifetime Excel enthusiast, Randy Austin founded Excel For Freelancers in 2017. Excel For Freelancers quickly became the most prominent resource Excel for developers to learn how to turn their passion for Excel into profits by building & selling their own excel-based applications for passive & recurring income.

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1	Option Explicit
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Option Explicit

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2
3
4
5 Private Sub Worksheet_SelectionChange(ByVal Target As Range)
6     If Target.CountLarge > 2 Then Exit Sub
7     On Error Resume Next
8     If Not Intersect(Target, Range("L4:N12" )) Is Nothing And Range("L" & Target.Row).Value <
9         > Empty Then
10        Range("B17" ).Value = Target.Row 'Set Review Row
11        Range("B14" ).Value = Range("R" & Target.Row).Value 'Bring Over DB Row
12        Review_Load 'Run Macro To Load Review
13    End If
14    On Error GoTo 0
15    If Not Intersect(Target, Range("D16:D9999" )) Is Nothing And Range("D" & Target.Row).
16        Value <> Empty Then
17        Range("B15" ).Value = Target.Row 'Set Selected Row
18        Workflow_Refresh
19        Doc_New 'Clear Existing Document
20    End If
21 End Sub
```

```

1 Option Explicit
2 Dim ThumbFolder As String, DocFolder As String, FileName As String, FilePath As String,
3 FileType As String, ThumbPath As String, ThumbName As String
4 Dim DocFile As FileDialog
5 Dim ObjChart As Object
6 Sub Browse_Original()
7     CheckFolders 'Check For Document & thumbnail folders
8     Set DocFile = Application.FileDialog(msoFileDialogFilePicker)
9     With DocFile
10        .Title = "Browse for original document"
11        .AllowMultiSelect = False
12        If .Show <> -1 Then GoTo NoSelection
13        FileName = Dir(.SelectedItems(1)) 'Extract File name with extension
14        Workflows.Range("H5" ).Value = FileName
15        If Dir(DocFolder & FileName, vbDirectory) <> "" Then Kill (DocFolder & FileName)
16        'Delete if already exists
17        FileCopy .SelectedItems(1), DocFolder & FileName 'Copy Document to shared folder
18        CreateThumbnail 'Run Macro to Generate Thumbnail
19        NoSelection:
20    End With
21 End Sub
22 Sub Browse_Revision()
23     CheckFolders 'Check For Document & thumbnail folders
24     DocFolder = Admin.Range("D3" ).Value & "\"
25     Set DocFile = Application.FileDialog(msoFileDialogFilePicker)
26     With DocFile
27        .Title = "Browse for original document"
28        .AllowMultiSelect = False
29        If .Show <> -1 Then GoTo NoSelection
30        FileName = Dir(.SelectedItems(1))
31        Workflows.Range("H9" ).Value = FileName
32        If Dir(DocFolder & FileName, vbDirectory) <> "" Then Kill (DocFolder & FileName)
33        FileCopy .SelectedItems(1), DocFolder & FileName 'Copy Document to shared folder
34        NoSelection:
35    End With
36 End Sub
37 Sub CheckFolders()
38     DocFolder = Admin.Range("D3" ).Value & "\" 'Shared Document Folder
39     If Dir(DocFolder, vbDirectory) = "" Or DocFolder = "" Then
40         MsgBox "Please set a shared document folder in the Admin screen"
41     End If
42     ThumbFolder = Admin.Range("D4" ).Value & "\" 'Shared Thumbnail Folder
43     If Dir(ThumbFolder, vbDirectory) = "" Or ThumbFolder = "" Then
44         MsgBox "To display document thumbnails, please set a Thumbnail Folder in the Admin
45         Screen"
46     End If
47 End Sub
48 Sub CreateThumbnail()
49     CheckFolders 'Check For Document & thumbnail folders
50     With Workflows
51        Application.ScreenUpdating = False
52        DocFolder = Admin.Range("D3" ).Value & "\" 'Shared Document Folder
53        ThumbFolder = Admin.Range("D4" ).Value & "\" 'Shared Thumbnail Folder
54        FileName = Workflows.Range("H5" ).Value 'File Name
55        FileType = Right(FileName, Len(FileName) - InStrRev(FileName, ".")) 'File Type
56        FilePath = DocFolder & FileName 'Document File Path

```

```

1 2
59     ThumbName = Replace(FileName, "." & FileType, "" ) & "_Thumb.jpg"
60     ThumbPath = ThumbFolder & ThumbName 'New Thumbnail Path
61     If FileType = "png" Or FileType = "jpg" Or FileType = "jpeg" Or FileType = "bmp" Or
        FileType = "Tiff" Then 'Picture File
62         .Pictures.Insert(FilePath).Name = "DocThumb"
63     Else 'Word or PDF
64         .OLEObjects.Add(FileName:=FilePath, Link:=False, DisplayAsIcon:=False).Name =
            "DocThumb"
65     End If
66     Set ObjChart = .ChartObjects.Add(200, 200, .Shapes("DocThumb" ).Width, .Shapes(
        "DocThumb" ).Height)
67     .Shapes("DocThumb" ).Copy
68     ObjChart.Activate
69     ActiveChart.Paste
70     If Dir(ThumbPath, vbDirectory) <> "" Then Kill (ThumbPath) 'Delete File If Already
        Exists
71     ActiveChart.Export FileName:=ThumbPath, FilterName:="JPEG"
72     .ChartObjects.Delete
73     .Shapes("DocThumb" ).Delete
74     .Range("B5" ).Value = ThumbName 'Set Thumbnail File Name
75     End With
76     Application.ScreenUpdating = True
77 End Sub
78
79 Sub Open_Original()
80     If Workflows.Range("H5" ).Value = "" Then Exit Sub
81     CheckFolders 'Check For Document & thumbnail folders
82     FilePath = DocFolder & "\" & Workflows.Range("H5" ).Value
83     ThisWorkbook.FollowHyperlink FilePath 'Full File Path
84 End Sub
85
86 Sub Open_Revision()
87     If Workflows.Range("H9" ).Value = "" Then Exit Sub
88     CheckFolders 'Check For Document & thumbnail folders
89     FilePath = Admin.Range("D3" ).Value & "\" & Workflows.Range("H9" ).Value
90     ThisWorkbook.FollowHyperlink FilePath
91 End Sub

```

```

1 Option Explicit
2 Dim DocRow As Long, DocCol As Long, LastRow As Long, LastResultRow As Long, RevDBRow As Long,
CountDelay As Long
3 Dim DocID As String, Supervisor As String
4
5 Sub Doc_Delete()
6 With Workflows
7 If .Range("B3").Value = Empty Then
8 MsgBox "Please select a Doc to delete"
9 Exit Sub
10 End If
11
12 If MsgBox("Are you sure you want to delete this document?" , vbYesNo, "Delete
Document" ) = vbNo Then Exit Sub
13 DocRow = .Range("B3").Value 'Doc Row
14 DocID = .Range("B2").Value 'Doc ID
15 DocDB.Range(DocRow & ":" & DocRow).Delete
16 Workflow_Refresh
17 Doc_New 'Run Macro To add New document
18 End With
19 End Sub
20
21 Sub Doc_Load()
22 With Workflows
23 .Range("B5,B14,B17,F3,H3,J3,F5,H5:I5,F7:J7,F9,H9:I9,F10:J10,F12").ClearContents
24 If .Range("B3").Value = Empty Then
25 MsgBox "Please make sure to select a document from the document workflows"
26 Exit Sub
27 End If
28 DocRow = .Range("B3").Value
29 For DocCol = 2 To 11 'Not For Reviewer Position (Formula)
30 If DocCol <> 10 Then .Range(DocDB.Cells(1, DocCol).Value).Value = DocDB.Cells(DocRow
, DocCol).Value
31 Next DocCol
32 End With
33 End Sub
34
35 Sub Doc_LoadReviews()
36 Workflows.Range("L4:N12,B17").ClearContents 'Clear Existing Reviews
37 With ReviewDB
38 LastRow = .Range("A99999").End(xlUp).Row
39 If LastRow < 3 Then Exit Sub
40 .Range("A2:G" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range("L2:L3"),
CopyToRange:=.Range("N2:Q2"), Unique:=True
41 Workflows.Range("L4:N12").Value = .Range("N3:P11").Value 'Bring Over Review Data
42 Workflows.Range("R4:R12").Value = .Range("Q3:Q11").Value 'Bring Over Review DB Row
43 End With
44 End Sub
45 Sub Doc_New()
46 With Workflows
47 .Range("B2,B5,B14,B17,F3,H3,J3,F5,H5:I5,F7:J7,F9,H9:I9,F10:J10,F12,L4:N12,R4:R12").
ClearContents
48 If ActiveSheet.CodeName = "Workflows" Then .Range("F3").Select
49 End With
50 End Sub
51
52 Sub Doc_SaveUpdate()
53 With Workflows
54 If .Range("B1").Value <> 5 Then
55 MsgBox "Please make sure to fill in all required fields"
56 Exit Sub

```

1 2 3

```

57     1 2 3 End If
58
59     If .Range("B3").Value = Empty Then 'New Doc
60         DocRow = DocDB.Range("A99999").End(xlUp).Row + 1
61         .Range("B2").Value = .Range("B4").Value 'Next Doc ID
62         DocDB.Range("A" & DocRow).Value = .Range("B4").Value 'Next Doc ID
63         If .Range("F9").Value = Empty Then 'No Reviwer Mgr Set
64             .Range("F9").Value = .Range("H3").Value 'Set Default reviewer to current staff
65         End If
66     Else 'Existing Doc
67         DocRow = .Range("B3").Value 'Doc Row
68     End If
69     For DocCol = 2 To 11
70         DocDB.Cells(DocRow, DocCol).Value = .Range(DocDB.Cells(1, DocCol).Value).Value
71     Next DocCol
72     'Save/Update Document Review Review (only if reviewer exists)
73     If .Range("F9").Value <> Empty Then
74         If .Range("B14").Value = Empty Then 'New Review
75             RevDBRow = ReviewDB.Range("A99999").End(xlUp).Row + 1
76             .Range("B14").Value = RevDBRow 'Set Review DB Row
77             ReviewDB.Range("A" & RevDBRow).Value = .Range("B2").Value 'Document ID
78             ReviewDB.Range("G" & RevDBRow).Value = "=Row()" 'Set Row formula
79         Else 'Esisting Review
80             RevDBRow = .Range("B14").Value 'Review Database Row
81         End If
82         ReviewDB.Range("B" & RevDBRow).Value = Now 'Review Date & Time
83         ReviewDB.Range("C" & RevDBRow).Value = .Range("F9").Value 'Reviewer Staff Name
84         ReviewDB.Range("D" & RevDBRow).Value = .Range("H9").Value 'Revision File Name
85         ReviewDB.Range("E" & RevDBRow).Value = .Range("F10").Value 'Notes
86         ReviewDB.Range("F" & RevDBRow).Value = .Range("F12").Value 'Status
87     End If
88 End With
89 Doc_LoadReviews
90 Workflow_Refresh
91 End Sub
92 Sub Doc_Select()
93     With Workflows
94         On Error Resume Next
95         .Range("B2").Value = Replace(Application.Caller, Left(Application.Caller, 11), "")
96         'Extract Document ID from Shape Name
97         DocID = .Range("B2").Value 'Document ID
98         .Range("B18").Value = False 'Set Move Document To False
99         .Range("B19").Value = .Shapes("DocumentGrp" & DocID).Left 'Set Intial Left Position
100        .Range("B20").Value = .Shapes("DocumentGrp" & DocID).Top 'Set Intial Top Position
101        Doc_LoadReviews 'Run Macro To Load Document Review Details
102        Doc_Load 'Run Macro To Load Document
103        .Shapes("DocumentGrp" & DocID).Select 'Select Document Group
104        Workflows_CheckForMove 'Run Check For Move Macro
105    End With
106 End Sub
107 Sub Review_Load()
108     With Workflows
109         If .Range("B14").Value = "" Then Exit Sub
110         RevDBRow = .Range("B14").Value 'Review DB Row
111         .Range("F9").Value = ReviewDB.Range("C" & RevDBRow).Value 'Reviewer Staff Name
112         .Range("H9").Value = ReviewDB.Range("D" & RevDBRow).Value 'Revision File Name
113         .Range("F10").Value = ReviewDB.Range("E" & RevDBRow).Value 'Notes
114         .Range("F12").Value = ReviewDB.Range("F" & RevDBRow).Value 'Status
115     End With

```

```

1
116 End Sub
117
118 Sub Workflows_CheckForMove()
119     With Workflows
120         If .Range("B2").Value = Empty Then Exit Sub
121         DocID = .Range("B2").Value 'Doc ID
122
123         For CountDelay = 1 To 100000
124             DoEvents
125             If .Range("B18").Value = True Then End 'Exit Loop on Move Document = true
126
127             With .Shapes("DocumentGrp" & DocID)
128                 If .Left <> Workflows.Range("B19").Value Or .Top <> Workflows.Range("B20").
Value Then 'Move Detect
129                     'Check for incorrect move or missing Supervisor
130                     If .Left < Workflows.Range("F1").Left Or Workflows.Cells(14, .TopLeftCell.
Column).Value = "" Or .Top < Workflows.Range("F15").Top Then
131                         MsgBox "Plase make sure to move the document to a workflow containing a
supervisor name"
132                         Workflow_Refresh
133                         Exit Sub
134                     End If
135                     Supervisor = Workflows.Cells(14, .TopLeftCell.Column).Value 'Supervisor Name
136                     Workflows.Range("F9").Value = Supervisor 'Set Supervisor
137                     Workflows.Range("F12").Value = [Pending] 'Set Pending Status
138                     Workflows.Range("B18").Value = True 'Set Move Document to True
139                     Doc_SaveUpdate 'Save Changes
140                 End If
141             End With
142         Next CountDelay
143         .Range("B18").Value = True 'Set Move Document to True
144     End With
145 End Sub

```



```

1 Option Explicit
2 Dim CompFlowRow As Long, CompFlowCol As Long, LastFlowRow As Long, LastRow As Long,
LastResultRow As Long, ResultRow As Long, SelRow As Long
3 Dim PosCol As Long
4 Dim Posit As String, DocName As String, ThumbFolder As String, ThumbName As String, ThumbPath
As String, DocID As String
5 Dim PositRng As Range
6 Dim TopPos As Double, LeftPos As Double
7 Dim DocShp As Shape
8
9 Sub Doc_ApproveAndNext()
10 With Workflows
11 If .Range("B2").Value = "" Then
12 MsgBox "Please select a document before moving it to the next manager"
13 Exit Sub
14 End If
15 DocID = .Range("B2").Value 'Document ID
16 On Error Resume Next
17 Set DocShp = .Shapes("DocumentGrp" & DocID)
18 On Error GoTo 0
19 If DocShp Is Nothing Then
20 MsgBox "Please select a document before moving it to the next manager"
21 Exit Sub
22 End If
23 PosCol = DocShp.TopLeftCell.Column
24 If .Cells(14, PosCol + 1).Value = "" Then
25 MsgBox "Please make sure to move this document to a position containing a
supervisor name"
26 Exit Sub
27 End If
28 .Range("F12").Value = [Pending] 'Set default Pending Status (Admin screen)
29 .Range("F9").Value = .Cells(14, PosCol + 1).Value 'Set Reviewer Name
30 .Range("H9:I9,F10:J10").ClearContents 'Clear Notes & revision
31 Doc_SaveUpdate
32 End With
33 End Sub
34
35 Sub Doc_SendToOriginator()
36 With Workflows
37 If .Range("B2").Value = "" Then
38 MsgBox "Please select a document before moving it to the next manager"
39 Exit Sub
40 End If
41 DocID = .Range("B2").Value 'Document ID
42 On Error Resume Next
43 Set DocShp = .Shapes("DocumentGrp" & DocID)
44 On Error GoTo 0
45 If DocShp Is Nothing Then
46 MsgBox "Please select a document before moving it to the next manager"
47 Exit Sub
48 End If
49 .Range("F9").Value = .Range("H3").Value 'Reset Current Review
50 .Range("F12").Value = [Rejected] 'Send back to originator
51 .Range("H9:I9,F10:J10").ClearContents 'Clear Notes & revision
52 Doc_SaveUpdate
53 End With
54 End Sub
55
56 Sub Doc_SendToPrevRev()
57 With Workflows
58 If .Range("B2").Value = "" Then

```

1 2 3

```

1 2 3
59   MsgBox "Please select a document before moving it to the next manager"
60   Exit Sub
61 End If
62   DocID = .Range("B2" ).Value 'Document ID
63   On Error Resume Next
64   Set DocShp = .Shapes("DocumentGrp" & DocID)
65   On Error GoTo 0
66   If DocShp Is Nothing Then
67       MsgBox "Please select a document before moving it to the next manager"
68       Exit Sub
69   End If
70   PosCol = DocShp.TopLeftCell.Column
71   If .Cells(14, PosCol - 1).Value = "" Or PosCol = 6 Then
72       MsgBox "Please make sure to move this document to a previous position containing a
73       name"
74       Exit Sub
75   End If
76   .Range("F12" ).Value = [NeedsRev] 'Set Needs Revision Status
77   .Range("F9" ).Value = .Cells(14, PosCol - 1).Value 'Set Reviewer Name
78   .Range("H9:I9,F10:J10" ).ClearContents 'Clear Notes & revision
79   Doc_SaveUpdate
80 End Sub
81 Sub Workflow_Refresh()
82     With Workflows
83         'Check For Thumb & Doc Folders
84         ThumbFolder = Admin.Range("D4" ).Value & "\" 'Shared Thumbnail Folder
85         If Dir(ThumbFolder, vbDirectory) = "" Or ThumbFolder = "" Then
86             MsgBox "To display document thumbnails, please set a Thumbnail Folder in the Admin
87             Screen"
88             'No need to exit sub, documents can be displayed without thumbnails
89         End If
90
91         'Check For Selected Flow Row
92         If .Range("B15" ).Value = Empty Then
93             MsgBox "Please select a Flow Type to Load Document Workflows"
94             Exit Sub
95         End If
96         SelRow = .Range("B15" ).Value 'Selected Flow Type Row
97         'Clear existing document thumbnails
98         For Each DocShp In .Shapes
99             If InStr(DocShp.Name, "Document" ) > 0 Then DocShp.Delete
100        Next DocShp
101        .Range("B18" ).Value = True 'Set Move to True to avoid loop
102        .Range("B2,F15:P15,F101:P101" ).ClearContents 'Clear Existing Positions & Document
103        Counts
104        If .Range("B16" ).Value = Empty Then
105            MsgBox "Please select a corect Workflow Type to load workflows"
106            Exit Sub
107        End If
108        CompFlowCol = .Range("B16" ).Value + 5 'Admin Company Workflow Column
109        LastFlowRow = Admin.Cells(18, CompFlowCol).End(xlUp).Row
110        If LastFlowRow < 8 Then
111            MsgBox "Please make sure to add company positions for the selected flow"
112            Exit Sub
113        End If
114        Application.ScreenUpdating = False
115        For CompFlowRow = 8 To LastFlowRow
116            .Cells(15, CompFlowRow - 2).Value = Admin.Cells(CompFlowRow, CompFlowCol).Value '
117            Set Flow Type In columns

```

1 2 3

```

1 2 3
116     Next CompFlowRow
117     End With
118     'MsgBox SortString
119     'Filter out active documents based on selected Flow types
120     With DocDB
121         LastRow = .Range("A99999").End(xlUp).Row 'Last Of Documents database
122         If LastRow < 3 Then Exit Sub
123         .Range("A3:K" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range("S2:T3" ),
124         CopyToRange:=.Range("AD2:AN2" ), Unique:=True
125         LastResultRow = .Range("AD99999").End(xlUp).Row
126         If LastResultRow < 3 Then Exit Sub
127         'Add Document Thumbnails To Schedule
128     End With
129     With Workflows
130         For ResultRow = 3 To LastResultRow
131             If DocDB.Range("AL" & ResultRow).Value = Empty Then GoTo NextDoc 'Skip on no
132             reviewer postion
133             DocID = DocDB.Range("AD" & ResultRow).Value 'Document ID
134             DocName = DocDB.Range("AE" & ResultRow).Value 'Document Name
135             Posit = DocDB.Range("AM" & ResultRow).Value 'Reviewer Position
136             ThumbName = DocDB.Range("AJ" & ResultRow).Value 'Thumbnail Name
137             ThumbPath = ThumbFolder & ThumbName 'Full Thumbnail Path
138             Set PositRng = .Range("F15:P15").Find(Posit, , xlValues, xlWhole)
139             If PositRng Is Nothing Then GoTo NextDoc
140             PosCol = PositRng.Column 'Position Column
141             LeftPos = .Cells(1, PosCol).Left + 1 'Set Left Position
142             TopPos = .Cells(16, PosCol).Top + ((.Shapes("SampleDocGrp").Height + 5) * .Cells(
143             101, PosCol).Value) + 2 'Set Top Position
144             .Shapes("SampleDocGrp").Duplicate.Name = "DocumentGrp" & DocID
145             With .Shapes("DocumentGrp" & DocID)
146                 'Set Thumbnail
147                 With .GroupItems("SampleDocThumb" )
148                     .Name = "DocumentThm" & DocID
149                     If Dir(ThumbPath, vbDirectory) <> "" Then .Fill.UserPicture (ThumbPath)
150                     'Adds Thumbnail picture as background
151                 End With
152                 'Set Document Name Text Shape
153                 With .GroupItems("SampleDocName" )
154                     .Name = "DocumentNam" & DocID
155                     .TextFrame2.TextRange.Text = DocName 'Set Document Name
156                 End With
157                 'Set Document group Position
158                 .Left = LeftPos 'Set Left Postion
159                 .Top = TopPos 'Set Top Position
160                 .Width = Workflows.Cells(1, PosCol).Width - 4
161             End With
162             .Cells(101, PosCol).Value = .Cells(101, PosCol).Value + 1 'Increment Document
163             NextDoc:
164         Next ResultRow
165     End With
166     Application.ScreenUpdating = True
167 End Sub

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Thank You!

This source code was created and made available to help you gain a better understanding of how VBA is used to create amazing Excel-based applications.

Thank you so much for your continued shares, likes and support. It really helps.



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