

# PATSAutomation (Excel Plug-In) Installation Guide

## Installing PATSAutomation (Excel Plug-In)

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Any requests for further information or clarification of content should be referred to:

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## 1 Introduction

This document describes how to install PATSAutomation: software that enables two-way communication between Pro-Mark and Excel, and that provides a customised Excel spreadsheet for Pro-Mark users to use as their trading front end.

How to use PATSAutomation is described in a separate guide.


## 2 Hardware and Microsoft Requirements

The hardware must meet or exceed the specification required for Pro-Mark.

Before installing PATSAutomation, you must have installed:

- Microsoft Vista with SP1, or XP with SP3.
- .NET Framework 2.0 with SP1.
- Microsoft Office 2003 with SP3.
- Excel versions other than 2003 (including 2007) are not supported.
- NET Programmability Support enabled.
- If you do a full install of Microsoft Office 2003 with SP3 you will have this anyway. To check/install it later, follow the steps below.

### 2.1 Enabling .NET Programmability Support

1. Ensure you have a Microsoft Office CD or installation path.
2. Select  Control Panel > Add or Remove Programs > Microsoft Office 2003.
3. Click **Change**.
4. In the Setup Wizard, select ☒ Add or Remove Features.
5. Tick ☒ Excel and ☒ Choose advanced customization of applications. (It doesn't matter whether or not the other checkboxes are ticked.)
6. Click **Next**.
7. Expand Microsoft Office Excel and select .Net Programmability Support.



8. From the dropdown menu, select Run all from my computer.
9. Click **Update**.

### 3 Installing PATSAutomation

1. Download the Patsystems software for Excel Automation, from the same webpage you use to download Pro-Mark.
2. Extract the files and run the .exe file.
3. Follow the instructions in the Setup Wizard.

The software is then installed on your computer. Assuming you accepted the defaults suggested by the Setup Wizard, the folder used is:

C: \Program Files\PATSystems\PATSAutomation

You should now have an icon on your desktop, like the following:



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