# Autofill Service Records (EDVIR) S.O.P.

SLEEMAN BREWERIES LTD.

BY MATT RUETZ

# 1.0 - Preparation

First, open the "ServiceRecords_Auto" Excel workbook. If asked whether you want to **enable Macros,** select "**Enable**".

Make sure that the workbook has **at least one formatted line** that is **empty** at the bottom of the list:



Next, make sure that your **Outlook desktop application** is open.

Check that the folder name <u>between the square brackets</u> at the top of the sheet next to "Folder to Scan" contains the name of your email folder which collects maintenance updates from the trucks / trailers
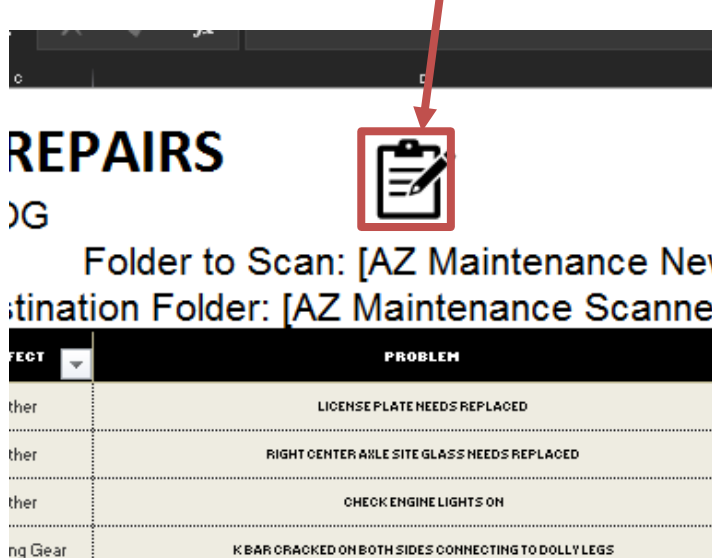


**It is important that these names match exactly in terms of upper/lower case letters and spaces!**

# 2.0 - Running the Autofill Macro

Now that Outlook and the workbook are open, there is at least one blank formatted row on the sheet, and the scan-folder name is between square brackets, the Autofill Macro is ready to go!

To launch Autofill, click the Clipboard icon at the top of the sheet:
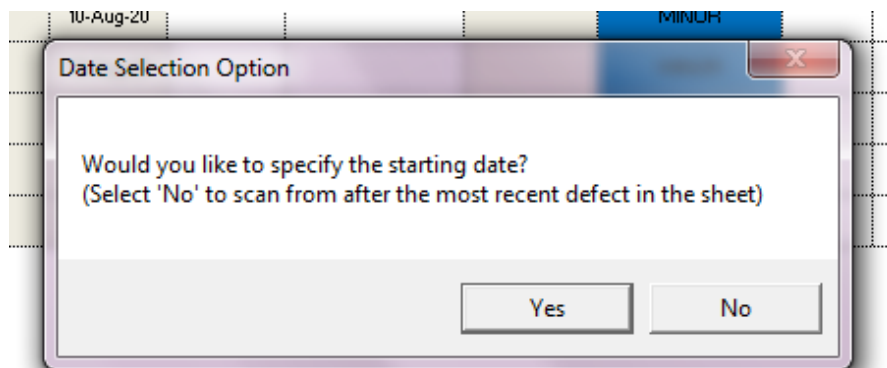


Once this is done, the following message box will appear:



You have two options for the **age of defect emails** that will be scanned in:

At this stage, you can select **"No"** to simply add defects if they were sent later than the most recent item already in the list.

OR, you can select **"Yes"** If you would like to pick a date. All emails received **ON / AFTER** this date will be added to the list.

# 2.1 - Automatic Date Selection Fill (Selected No)

If "No" was selected on the previous prompt, the scan will immediately begin. The program will automatically add any emails that arrived AFTER the date of the most recent item already in the list.

Once the scan is complete, another message *similar to the following* will appear:
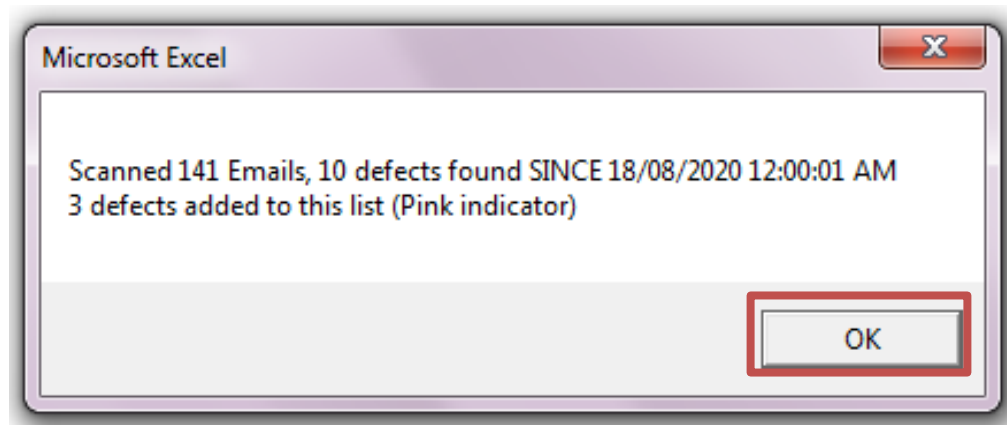
This message summarizes:

 - **The total number of emails scanned**

- **Total number of defects found** among those scanned emails.

- **The date after (and including) which emails were added from**

**-** And finally, the **number of defects that were added to this particular sheet** (Elite, Peterbilt, Kenworth)

Select "OK" to close this message.

Now, the list is filled with all defects received since the most recent update of the eDVIR:

The items that were **added by the Autofill** are shown with a **pink indicator** in the **A** cell of their respective row.

# 2.2 - Manual Date Selection Fill (Selected Yes)

If "Yes" was selected, a new form will pop up which looks like this:

Select the dropdown arrow to display a list of dates to choose from:

- You can click and drag the scroll bar to see dates further back. **Note** that this list contains the last 30 days from the current day.

Say, for example, we wanted only **yesterday's and today's** defects to be added to the list. I would select yesterday's date (8/17/2020 in this case), and then click the OK button.

All dates before 8/17/2020 (at 12:00:01 AM) will **not** be added to the list.

Now, the list is populated with all defects received since (and including) the date chosen in the Date Selection window.

| UNIT | DEFECT | ISSUED | DATE | BEEN REPORTED | | FOR SERVI | MAJOR/MINOR |
|---|---|---|---|---|---|---|---|
| 237 TRAILER | Lights | PASSENGER SIDE REAR BOTTOM CLP MISSING | 10-Aug-20 | | | | MINOR |
| 1829 TRUCK | Lights | LICENCE PLATE LIGHT IS OUT | 10-Aug-20 | | | | MINOR |
| 147062 TRAILER | Other | LICENSE PLATE NEDS REPLACED | 10-Aug-20 | | | | MINOR |
| 4153 TRUCK | Other | CHECK ENGINE LIGHTS | 11-Aug-20 | | | | MINOR |
| 32369 TRAILER | Other | RIGHT CENTER AXLE SITE GLASS NEEDS REPLACED | 11-Aug-20 | | | | MINOR |
| 32376 TRAILER | Tires | PASSENGER SIDE FIRST AXLE OUTSIDE EDGE OF TIRE DAMAGED SMALL CHUNK OUT OF TREAD | 18-Aug-20 | | | | MINOR |
| 1828 TRUCK | Service Brakes | BURNING BRAKE SMELL CHAMBER/CALIPER? REAR AXLE DRIVER SIDE | 17-Aug-20 | | | | MAJOR |
| 149083 TRAILER | Wheels Rims | NEW TIRES INSTALLED RETORQUE NEEDED? ALL AXLES | 17-Aug-20 | | | | MINOR |
| 1828 TRUCK | Engine | CHECK ENGINE LIGHT ON FAULT FOUND SAME AS LAST WEEK SPN3556 | 17-Aug-20 | | | | MINOR |
| 32365 TRAILER | Brakes | BRAKE ON FIRST AXLE OF DRIVER SIDE STICKING. LOT OF SMOKE | 18-Aug-20 | | | | MAJOR |
| 193236 TRAILER | Lights | REVERSE LIGHT IS MISSING A BOLT HANGING DOEN | 18-Aug-20 | | | | MINOR |
| 4184 TRUCK | Engine | ENGINE LIGHT AND WRENCH LIGHT ON. AS WELL, DRIVERS DOOR WINDOW/MIRROR CONTROLS WORK SPORATICALLY. SHORT IN DOOR HARNESS. | 18-Aug-20 | | | | MINOR |

# 3.0 - Filling All EDVIRs

The process can be repeated (starting from *1.0 – Preparation*), for the other EDVIR sheets as well. The program will automatically assign defects to the appropriate repair service's sheet based on the **unit number** of the truck that has the defect.

To assure that all truck defects go into the correct list, make sure that the lists on the UnitNums page accurately reflect which units should be worked on by which service company.

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | ELITE | PETERBILT | KENWORTH | | | | | | |
| 2 | 1641 | 1816 | 4142 | | | | | | |
| 3 | 1642 | 1817 | 4143 | | | | | | |
| 4 | 1643 | 1818 | 4153 | | | | | | |
| 5 | 1644 | 1819 | 4184 | | | | | | |
| 6 | 1645 | 1820 | 502-183 | | | | | | |
| 7 | 1646 | 1821 | 502-184 | | | | | | |
| 8 | 1647 | 1822 | | | | | | | |
| 9 | | 1823 | | | | | | | |
| 10 | | 1824 | | | | | | | |
| 11 | | 1825 | | | | | | | |
| 12 | | 1826 | | | | | | | |
| 13 | | 1827 | | | | | | | |
| 14 | | 1828 | | | | | | | |
| 15 | | 1829 | | | | | | | |
| 16 | | 1830 | | | | | | | |

Update these lists with new trucks. This is referenced by the Auto-populate macro

ELITE Service Record | Peterbilt Service Record | Kenworth Service Record | **UnitNums** | Av

# 4.0 - Moving Mail to Destination Folder

For the program to run as fast as possible, it is best to have items removed from the scan folder (i.e. "AZ Maintenance New" in this case) once they have been scanned.

To do this, while still keeping the emails archived, enter the name of **another folder that the scanned emails will be moved to** between the square brackets next to "Destination Folder"



**It is important that these names match exactly in terms of upper/lower case letters and spaces!**

To begin transferring emails to the Destination Folder, select the button labelled "CLEAR SCAN FOLDER" at the top of **any of the 3 eDVIR sheets:**
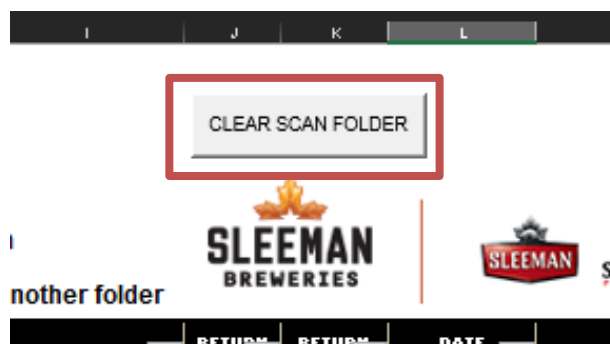


## Note:

- If nothing is entered as the Destination Folder (nothing between square brackets - "[]") then the CLEAR SCAN FOLDER process will not run, and emails will stay in the source folder! **This may cause the program to take longer in the future, and could cause duplicate defects**, as it will re-scan these emails every time.
- An **error will occur** if either the Folder to Scan, or the Destination Folder **do not actually exist** in your Outlook Inbox!

After the email transfer is complete, the following message will be displayed:
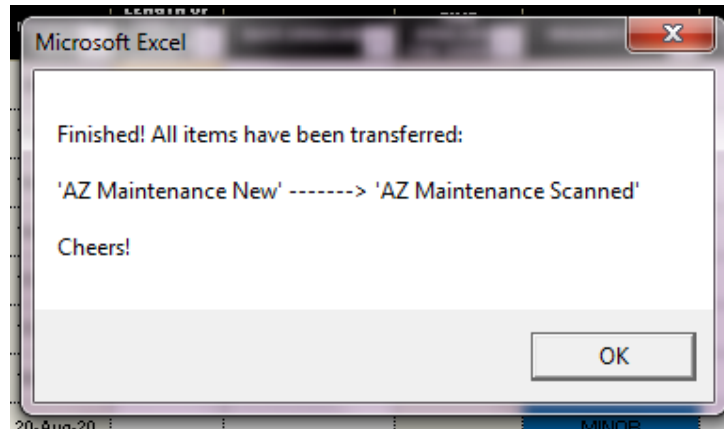


This indicates that all emails were successfully transferred to your selected Destination Folder.
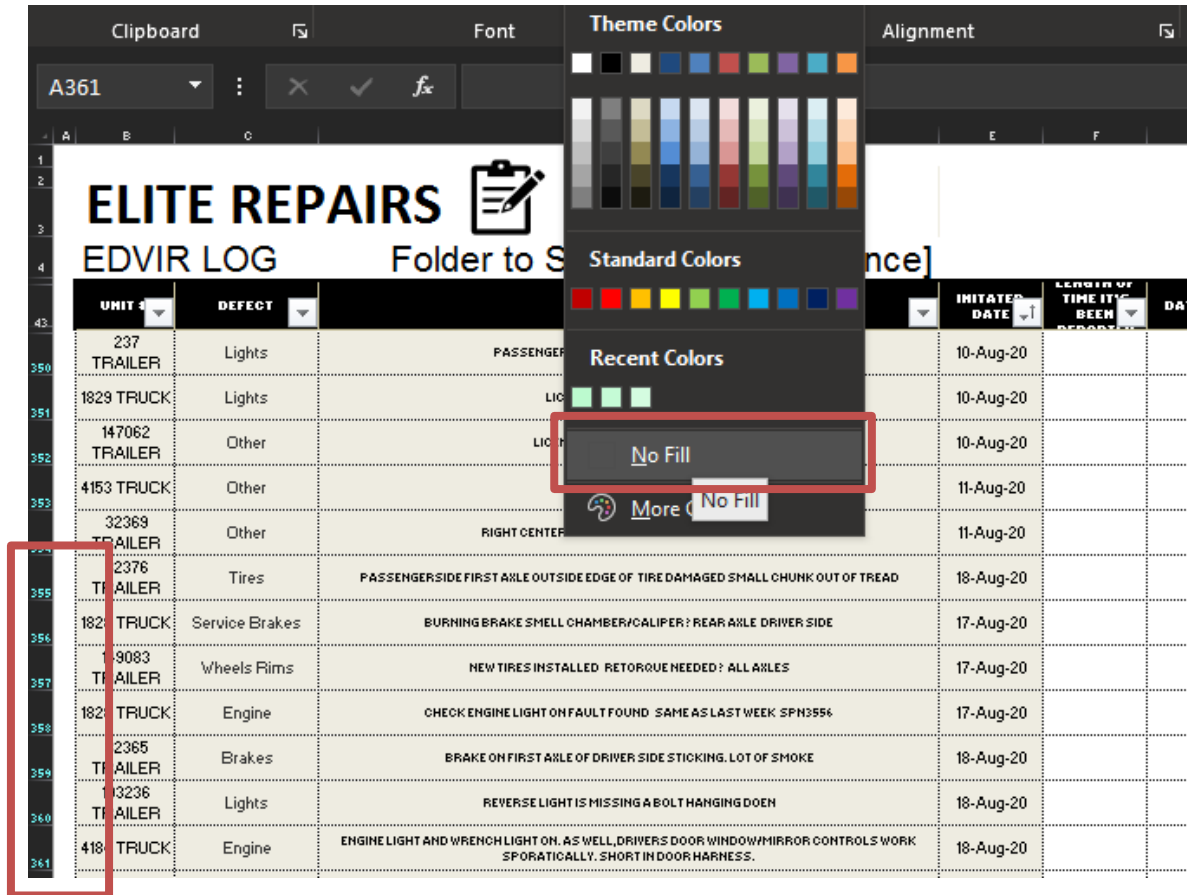
Select "OK" to close the notice.

# Finalizing

Once the Autofill process is finished, items that **do not belong in their respective list** can be removed by deleting the line, or copying the information into the appropriate list.

Many of the messages in the "PROBLEM" column may have spelling mistakes / may be unclear. Assure that these are clear and concise enough for the service team to understand.

Once all new additions are deemed valid, the **pink indicators** can be removed by highlighting these column "A" cells setting the background color of these cells to "No Fill":



Finally, make sure you **SAVE** the eDVIR workbook before closing to keep these changes.

# Mailing to Repair Company

To easily mail certain items on the list to the respective repair company, first navigate to the UnitNums page and make sure the correct contact email addresses are in the column of **[COMPANY NAME] MAIL**:



Now, on the EDVIR page, assure that all items you wish to send in the email <u>are marked as</u> **ADD TO MAIL** in column M for each item.



Now, select the **Mail** button at the top of this sheet to open the email window:



**NOTE:** The **Mail Pending** button does the same thing, but ONLY for emails marked as "WAITING FOR RESPONSE" which can be set in column M instead of ADD TO EMAIL. This is useful for reminding the respective company to give updates on previously sent defects.

A formatted email will be composed, containing information on each of the selected items, and the contacts for that company as given on the UnitNums page:
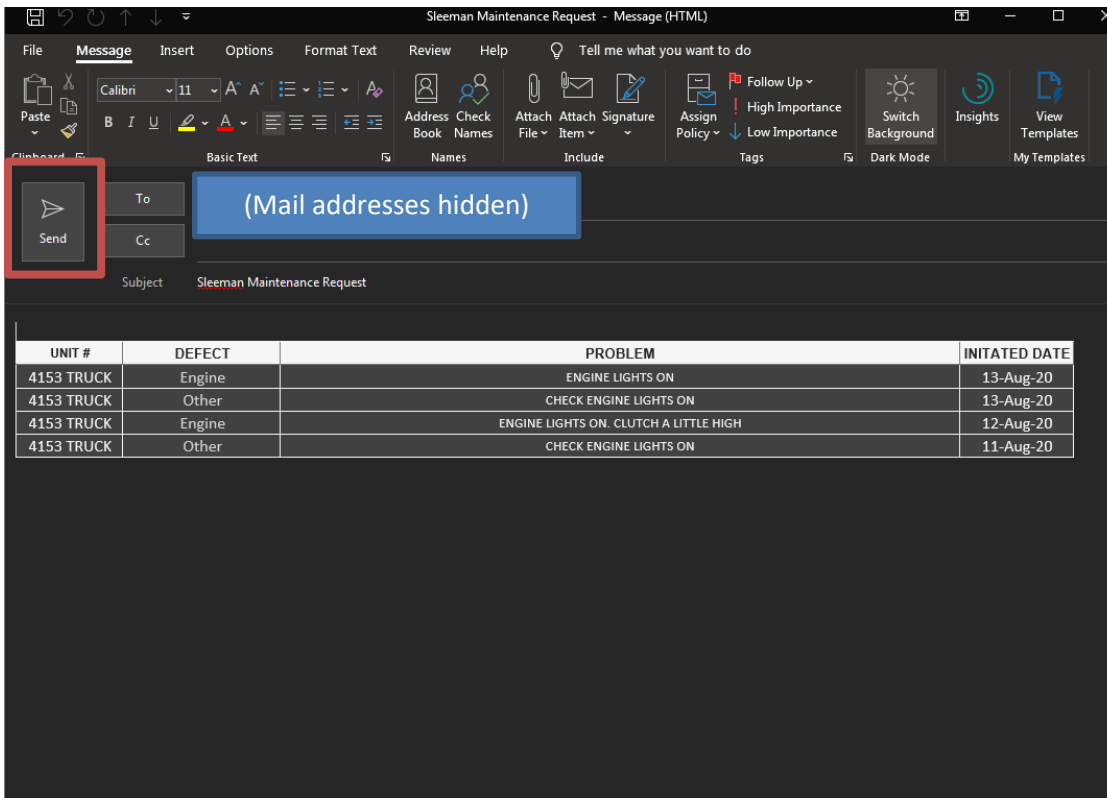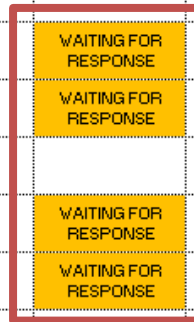


After editting the message to your liking, hit **Send**, which will close the email box after sending the email.

The following window will be shown after the email window closes:
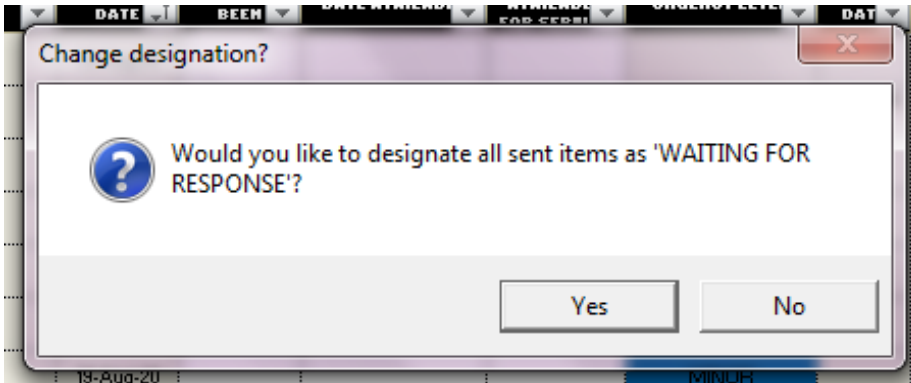


If "Yes" is selected here, all emails that were previously set to "ADD TO EMAIL" will now be changed to "WAITING FOR RESPONSE":



If the company does not provide a response on the items sent in the first email within some time, you may choose to send the ones with this designation by pressing the "Mail Pending" button at the top of the sheet.
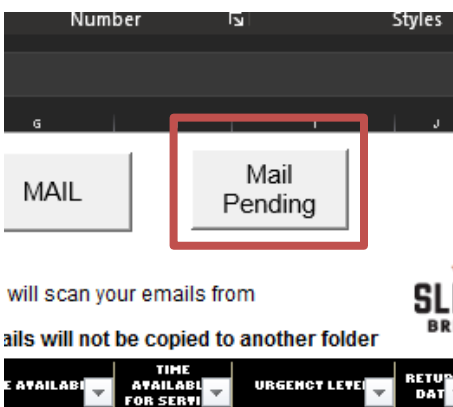


**NOTE:** Items with the WAITING FOR REPSONSE designation will not be changed after this email is sent. The contents of the cells <u>must be deleted by the user once the response from the repair company is given.</u>