

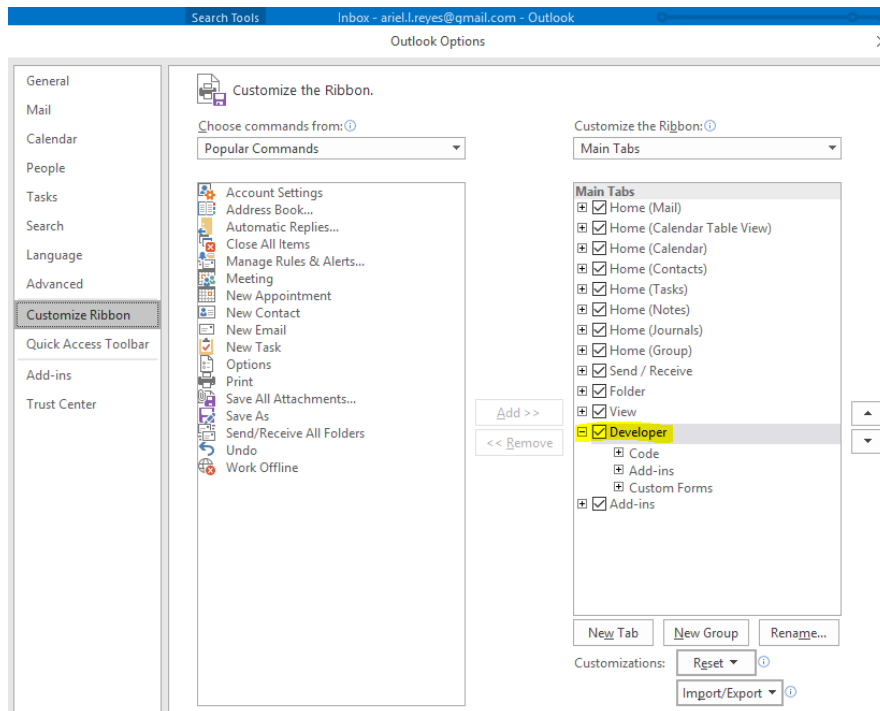
LMG Work Order Email Automation Installation and User Guide

Legacy Metering Group

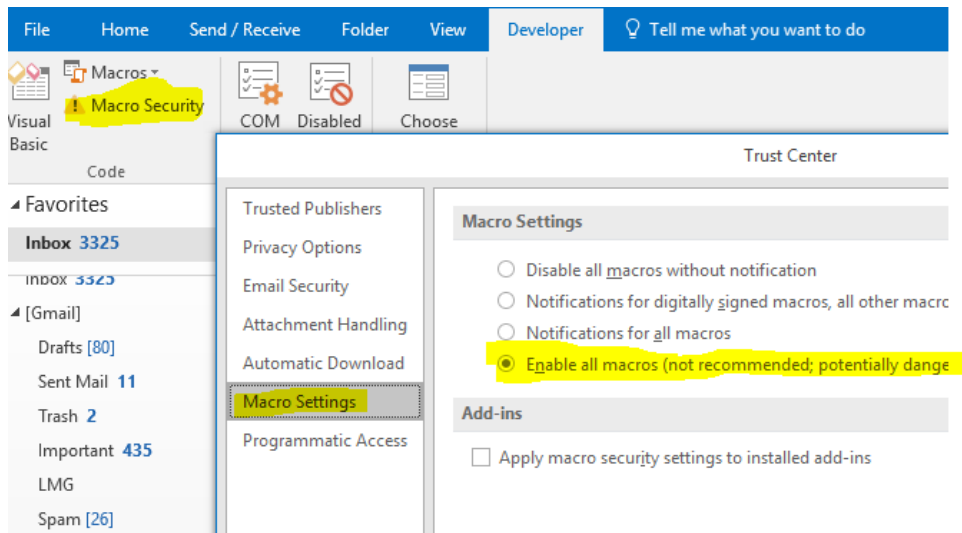
September 2016

Installation:

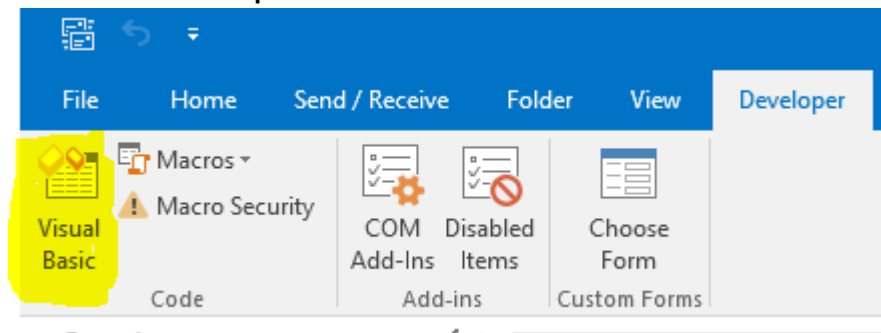
1. MS Outlook on the machine to be used.
2. Enable the “Developer Ribbon” from File > Options > “Custom Ribbon” and tick as shown below.



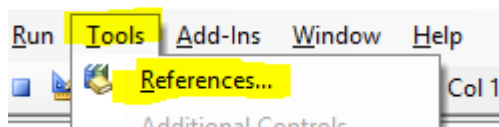
3. Allow MS Outlook to run macros as well, by clicking on “Macro Security”, then “Macro Settings”, and then click the radio button “Enable all macros (not recommended, potentially dangerous.”



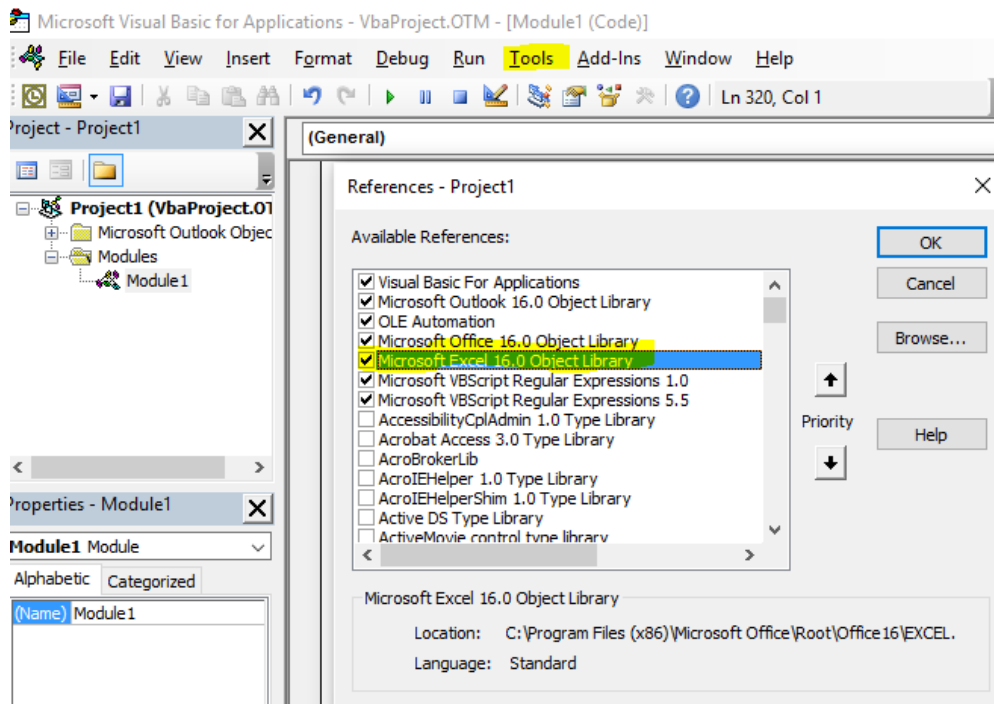
4. Click on the “Developer” ribbon and click on “Visual Basic”



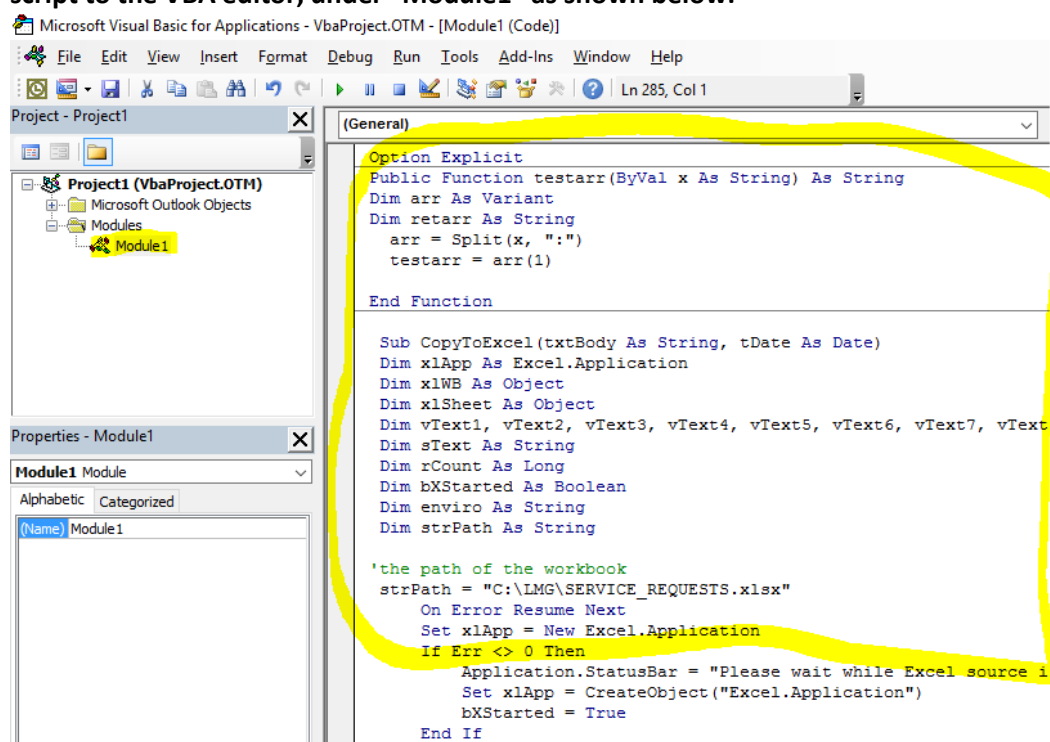
5. Once the VBA screen pops up, click on “Tools”, then “References”.



6. In the “References” screen, navigate and put a check on the check box labelled “Microsoft Excel 16.0 Object Library”.

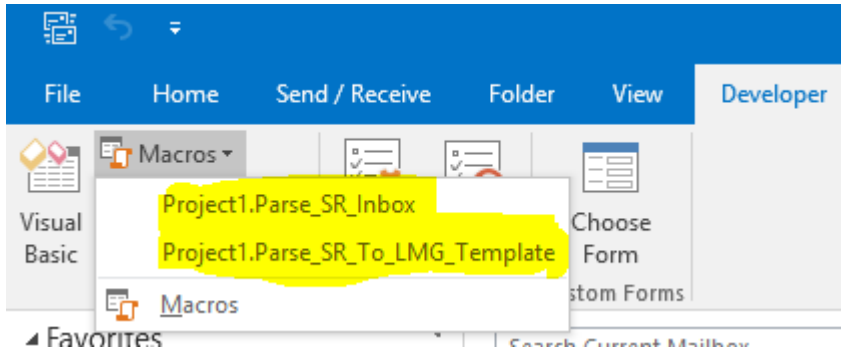


7. Download the script SR_Parser.vbs and LMG_WO.xlsx (from GitHub <https://github.com/alr888/LegacyMetering> or Dropbox <https://www.dropbox.com/home/LegacyMetering>) and copy both to your C:\LMG directory.
8. Ensure that you have the latest version from the repositories given above.
9. Using a text editor, open the script SR_Parser.vbs, copy and paste the contents of the script to the VBA editor, under "Module1" as shown below:



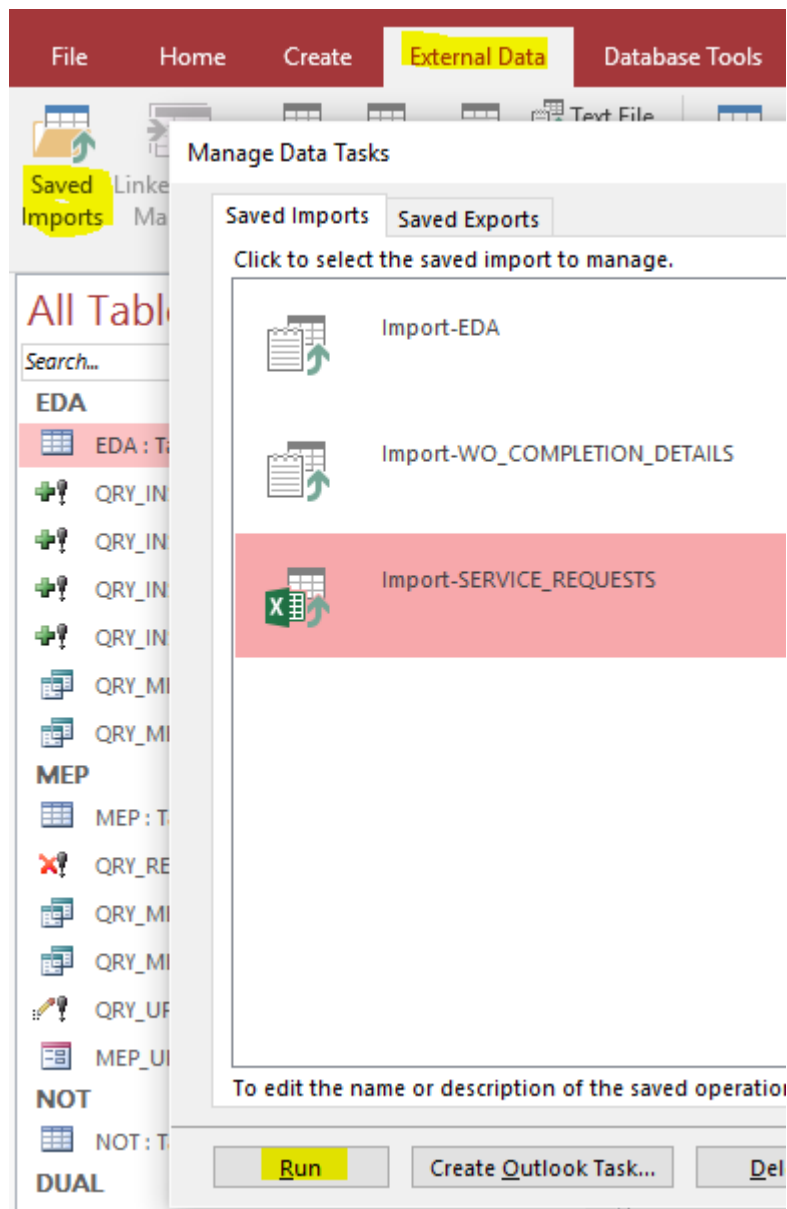
User Guide

1. There are 2 methods for creating LMG Work Orders, as shown below and described in the succeeding steps.



- 1.1 By parsing and loading SR from emails to the SERVICE_REQUESTS.xlsx spreadsheet and use MS Access to generate PDF WO Requests, sub-steps are as follows:

- i. Click on “Project1.Parse_SR_inbox”, and wait until you see the message "Parsing completed review data in C:\LMG\SERVICE_REQUESTS.xlsx"
 - ii. Once completed open the MS Access database “LMG_Database”
 - iii. Within the “LMG Database” click on the “External Data” tab, then click on “Saved Imports”, pick “Import-SERVICE_REQUESTS” and click “Run”.



- iv. Once the run completes you can inspect the data in the table named "SERVICE_REQUESTS".

All Tables

Search...

- QRY_UPDATE_CERT_I_RECS
- MEP_UP_METER_DETAILS
- NOT**
- NOT : Table
- DUAL**
- DUAL : Table
- QRY_INSERT_HEADER
- WO_COMPLETION_DETAILS**
- WO_COMPLETION_DETAILS : Table
- QRY_INSERT_WO_METERING_DETAILS
- SERVICE_REQUESTS**
- SERVICE_REQUESTS : Table**
- QRY_SR_TO_WO

SERVICE_REQUESTS

Retailer_ID	Job_Numbe	SR_D
NOVA	00019481	20/08/

- v. To generate the individual PDF WO's from the SRs, open the form "MEP_UP_METER_DETAILS", and double click on the button "Send SRs".

All Tables

Search...

- QRY_INSERT_I_RECS
- QRY_INSERT_M_RECS
- QRY_INSERT_R_RECS
- QRY_MEP_M_COUNT
- QRY_MEP_R_COUNT
- MEP**
- MEP : Table
- QRY_REMOVE_WO_METERING_DETAILS
- QRY_MEP_UPDATE
- QRY_METER_RECORD_FOR_UPD
- QRY_UPDATE_CERT_I_RECS
- MEP_UP_METER_DETAILS**
- NOT
- NOT : Table
- DUAL**
- DUAL : Table

MEP_UP_METER_DETAILS

ICP

ID_NUM	REC_NO	RECORD_TY	SERIAL_NO
*	0	0	

Record: 1 of 1

Send SRs

- vi. A formatting message will appear, you need to click "OK".

Now outputting
'QRY_SR_TO_WO'
to a mail message

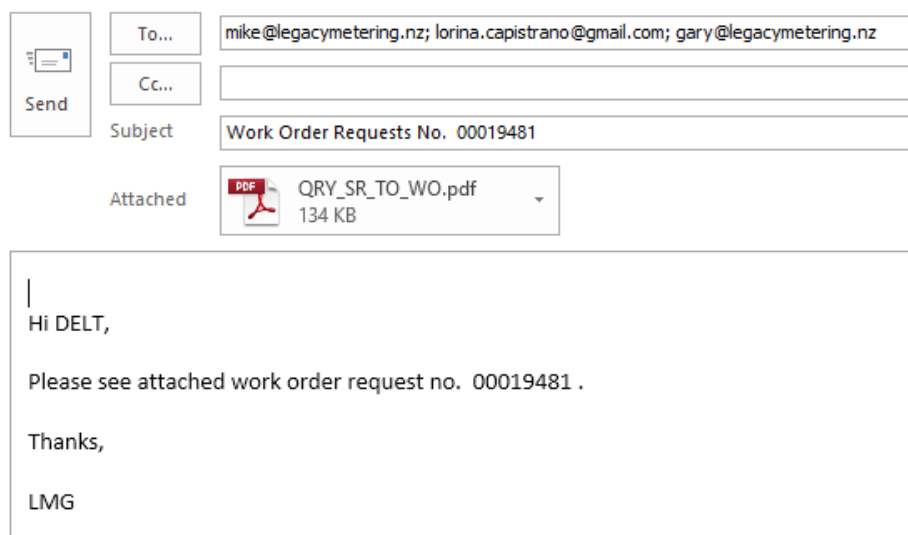
Microsoft Access

The section width is greater than the page width, and there are no items in the additional space, so some pages may be blank.
For example, the report width may be wider than the page width.

OK Cancel

Send SRs

- vii. An MS Outlook message will appear with the WO as a PDF attachment for each SR loaded.



- viii. Please take note that the email addresses for FSP are held in the table “EMAIL_ADDRESSES”, this value links directly to the information held in column O, named “Existing_FSP”, “SERVICE_REQUESTS.xlsx”.

All Tables

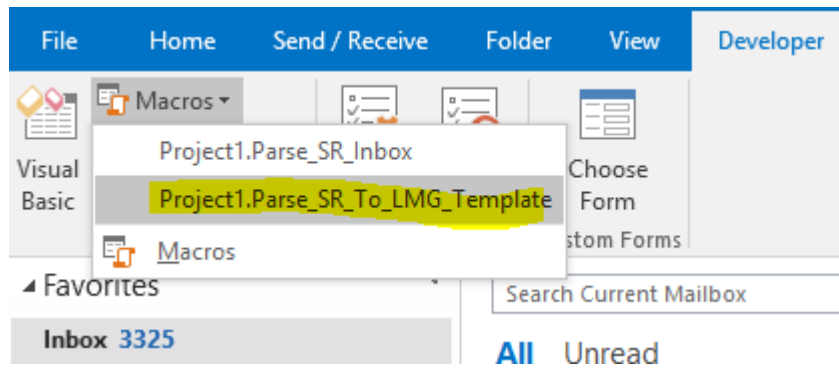
ID	Email_Address	Partner_ID	Partner_Typ
1	mike@legacymetering.nz,lorina.c	DELT	FSP
2	ariel.l.reyes@gmail.com	VEMS	FSP
(New)			

F	G	H	I	J	K	L	M	N	O	P
ISS	Premise_ICP	Custom_P	Date_Required	Dog_or_Job_Description	Existi	Existi	Existing_Mete	Existi	Existing_FSP	Existing_C
OV	0000066718CPA56	06 3592703	12/08/2016	please visit site and replace smart m	211250550, 2				DELT	

- ix. It is still to be decided on how SRs and WOs will be recorded.
Currently, we need to delete all records in the SERVICE_REQUESTS table to avoid sending duplicate WOs.

1.2 By parsing SR emails and creating individual WO requests using the LMG MS Excel template. Sub-steps are as follows:

- i. Within MS Outlook, you need to click on “Project1.Parse_SR_To_LMG_Template”.



- ii. This process will generate an templated WO corresponding to every SR email received with the filenaming convention LMG_WO_<Job number>_yyyymmdd.xlsx in C:\LMG, as shown below:

 LMG_WO_00019481_20160904 4/09/2016 10:05 PM

- iii. The WO generated can then be reviewed and emails as an attachment individually.

- 2 Ensure that after you have processed all SRs and sent out LMG Work Orders, kindly move all SR emails from your MS Outlook Inbox folder to any other folder you chose to avoid reprocessing.
- 3 One last note, the parsers default to searching for email subjects beginning with "Service Request Case".