LMG Work Order Email Automation Installation and User Guide

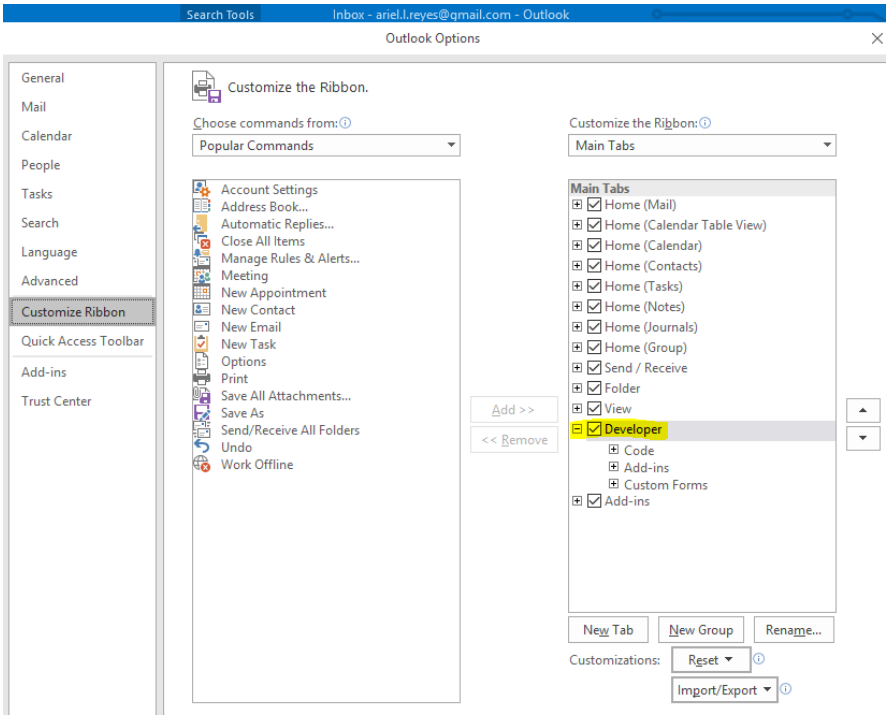
Legacy Metering Group

September 2016

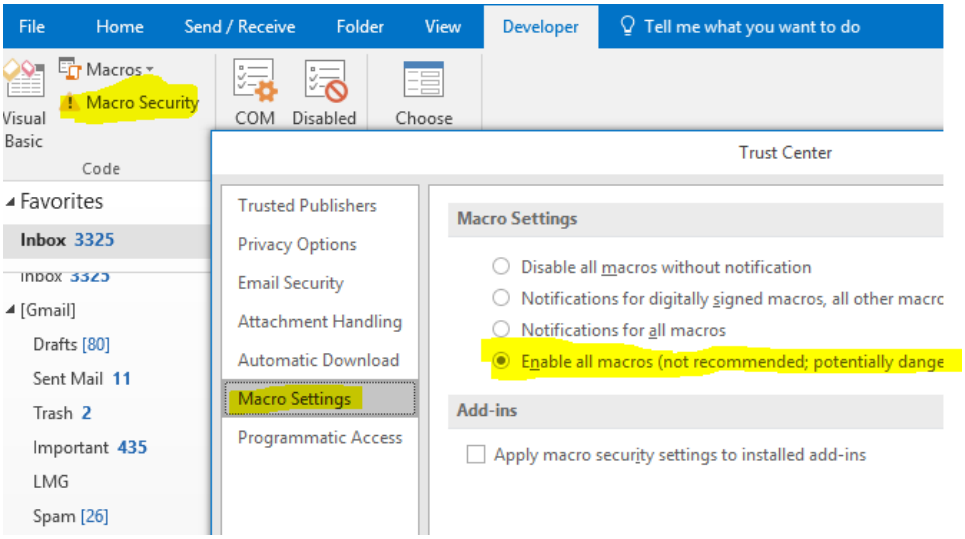
Installation:

1. **MS Outlook on the machine to be used.**

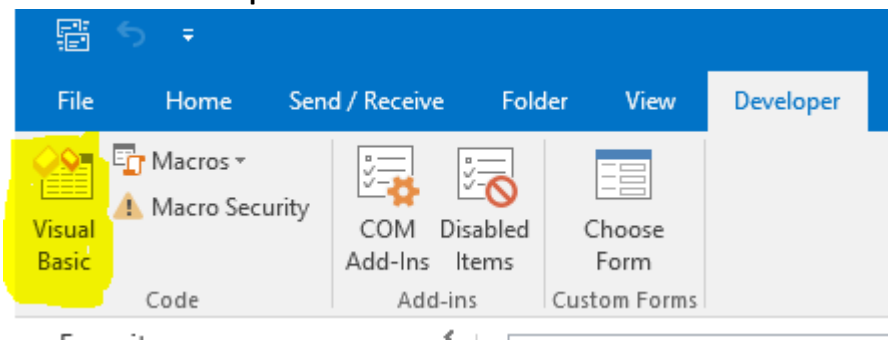
2. **Enable the "Developer Ribbon" from File > Options > "Custom Ribbon" and tick as shown below.**



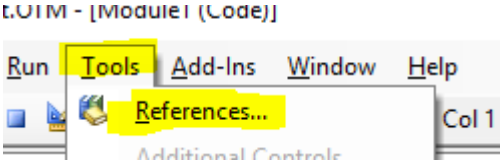
3. **Allow MS Outlook to run macros as well, by clicking on "Macro Security", then "Macro Settings", and then click the radio button "Enable all macros (not recommended, potentially dangerous."**



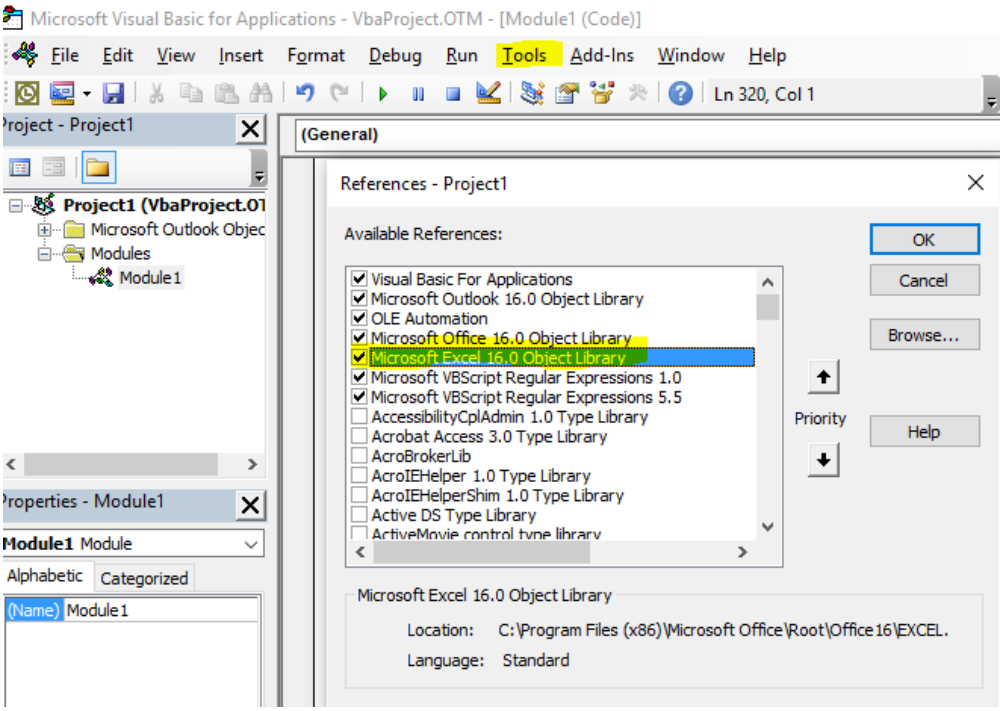
4. **Click on the "Developer" ribbon and click on "Visual Basic"**



5. **Once the VBA screen pops up, click on "Tools", then "References".**



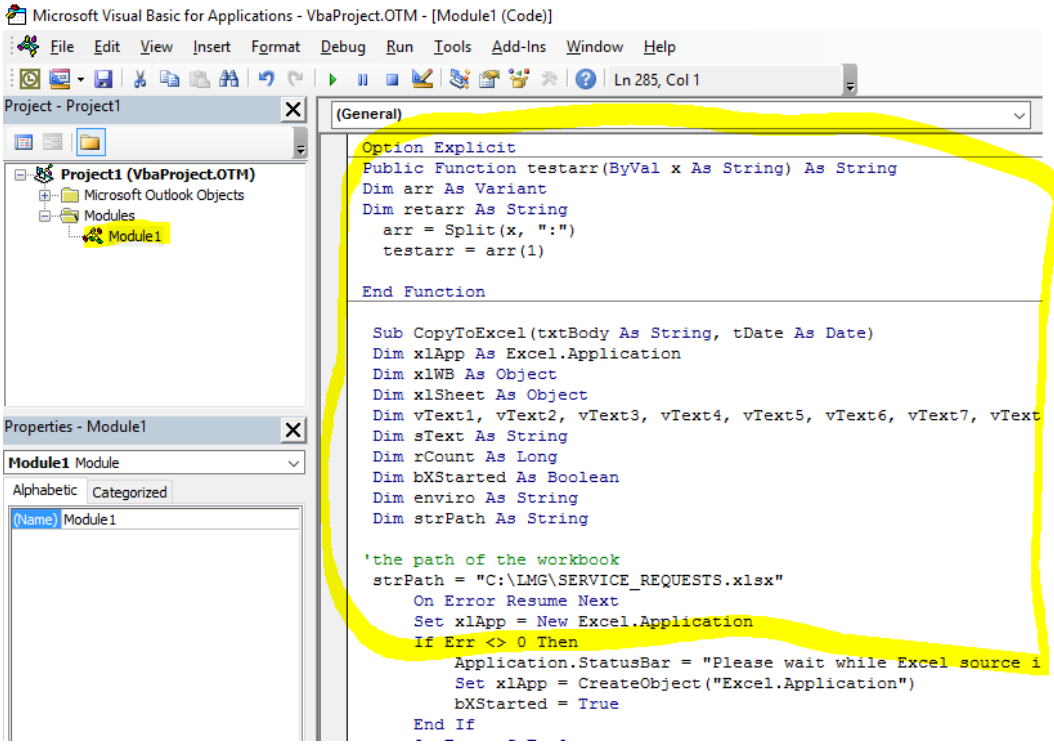
6. **In the "References" screen, navigate and put a check on the check box labelled "Microsoft Excel 16.0 Object Library".**



7. **Download the script SR_Parser.vbs (from GitHub https://github.com/alr888/LegacyMetering or Dropbox https://www.dropbox.com/home/LegacyMetering).**

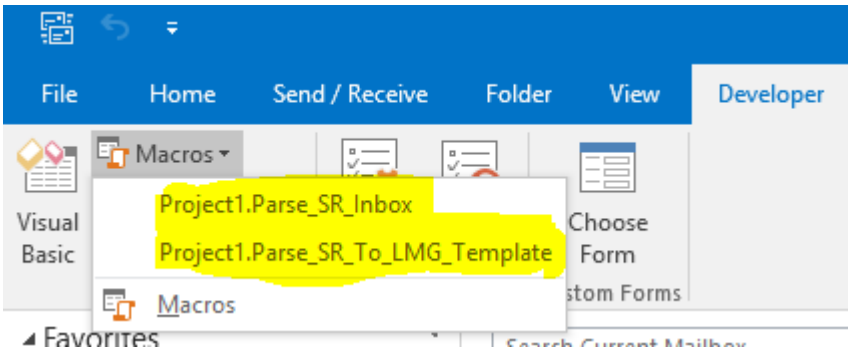
8. **Ensure that you have the latest version from the repositories given above.**

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.**

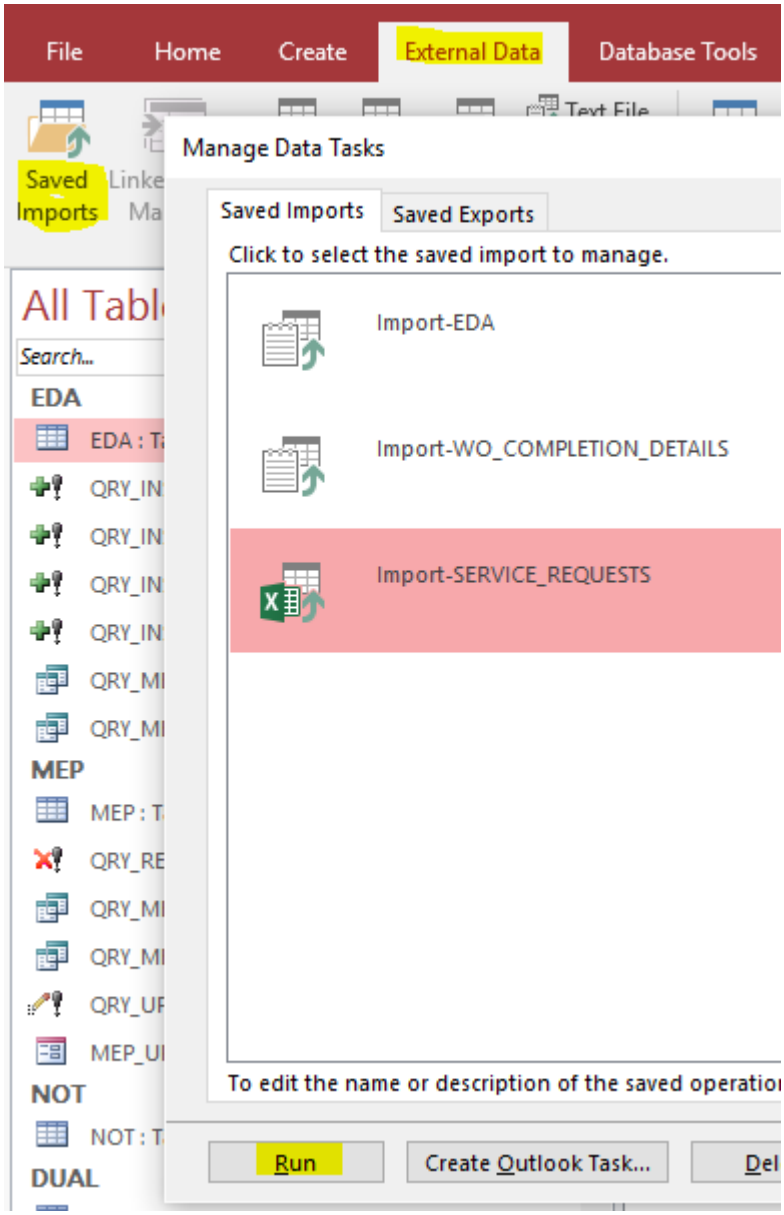


1.1 By parsing and loading SR from emails to the SERVICE_REQUESTS.xlsx spreadsheet and use MS Access to generate PDF WO Requests, sub-steps are as follows:

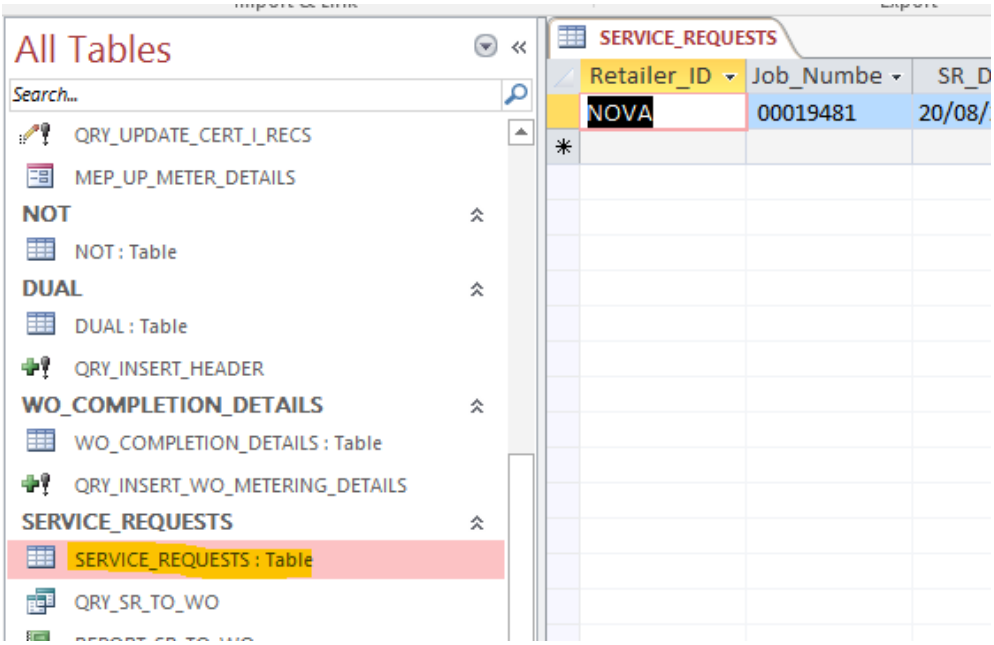
i. **Click on "Project1.Parse_SR_inbox", and wait until you see the message "Parsing completed review data in C:\LMG\SERVICE_REQUESTS.xlsx"**

ii. **Once completed open the MS Access database "LMG_Database"**

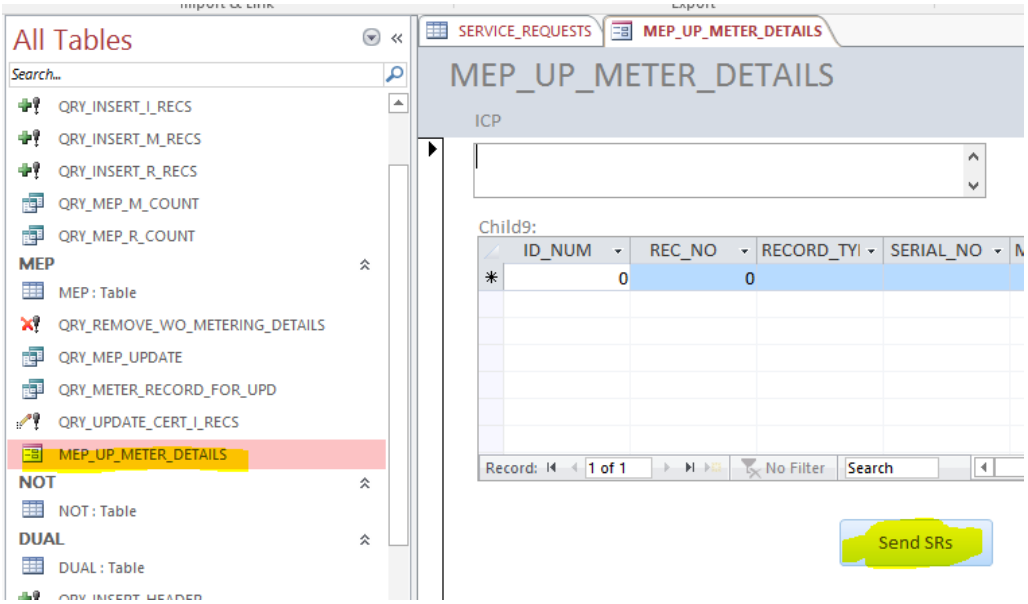
iii. **Within the "LMG Database" click on the "External Data" tab, then click on "Saved Imports", pick "Import-SERVICE_REQUESTS" and click "Run".**



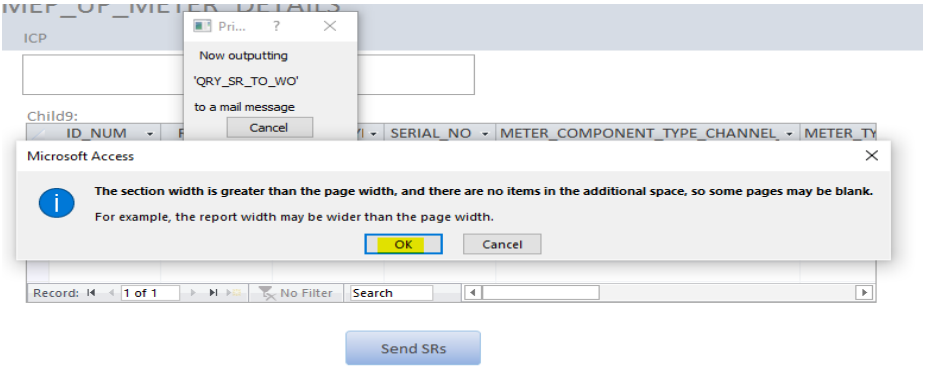
iv. **Once the run completes you can inspect the data in the table named "SERVICE_REQUESTS".**



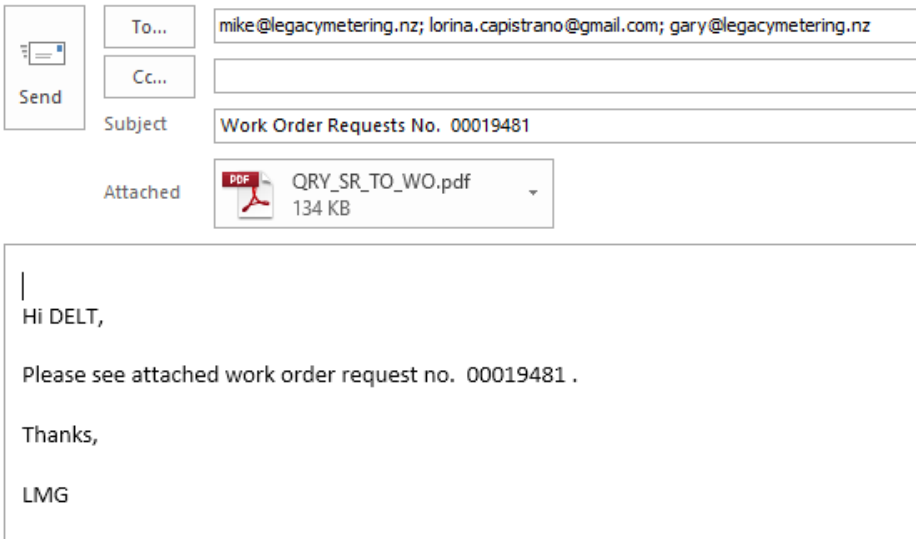
v. To generate the individual PDF WOs from the SRs, open the form "MEP_UP_METER_DETAILS", and double click on the button "Send SRs".



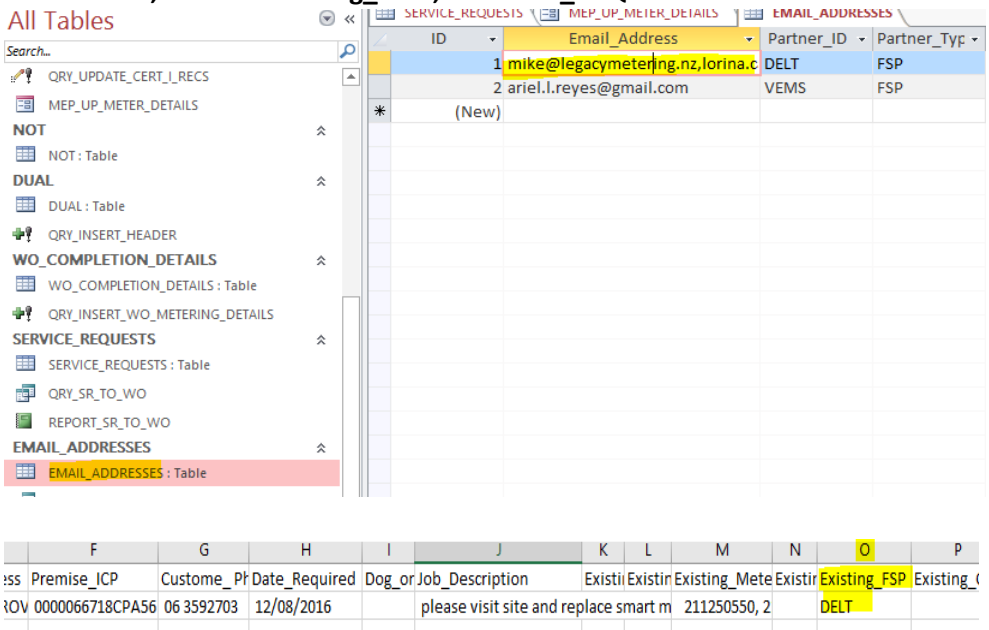
vi. A formatting message will appear, you need to click "OK".



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



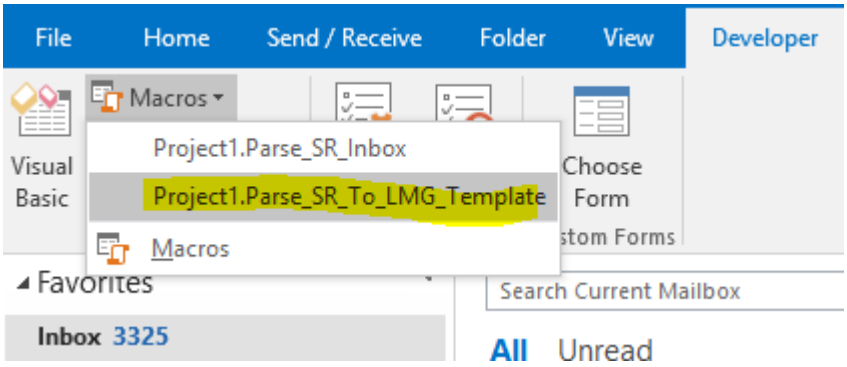
viii. **Please take note that the email addresses for FSP are held in the table "EMAIL_ADDRESSES", this value links directly to the information held in column O, named "Existing_FSP", "SERVICE_REQUESTS.xlsx".**



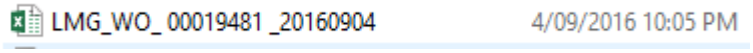
ix. **It is still to be decided on how SRs and WOs will be recorded. Currently, we need to delete all records in the SERVICE_REQUESTS table to avoid sending duplicate WOs.**

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:**



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".**