

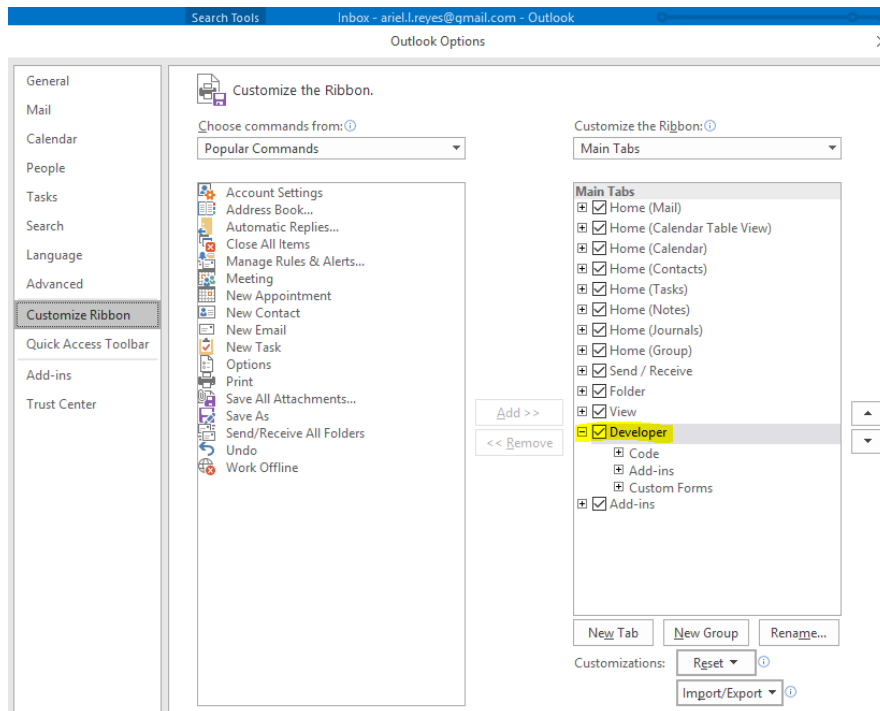
# LMG Work Order Email Automation Installation and User Guide

Legacy Metering Group

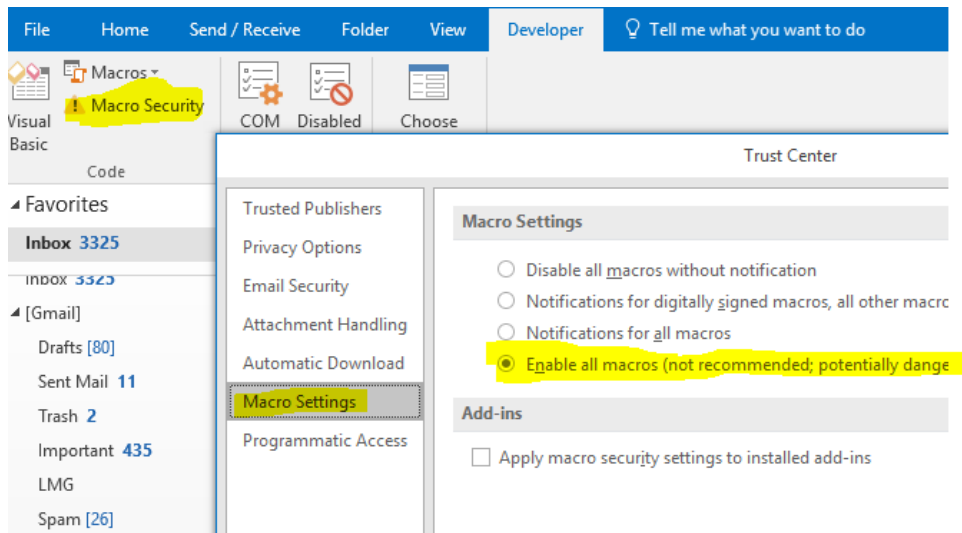
September 2016

## Installation:

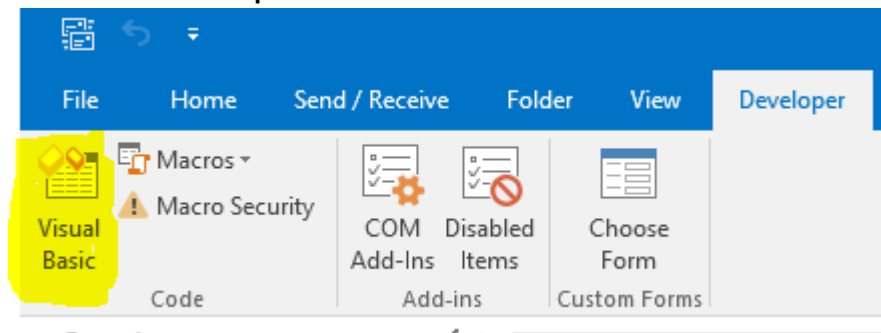
1. MS Outlook on the machine to be used.
2. Enable the “Developer Ribbon” from File > Options > “Custom Ribbon” and tick as shown below.



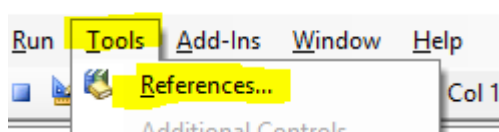
3. Allow MS Outlook to run macros as well, by clicking on “Macro Security”, then “Macro Settings”, and then click the radio button “Enable all macros (not recommended, potentially dangerous.”



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



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

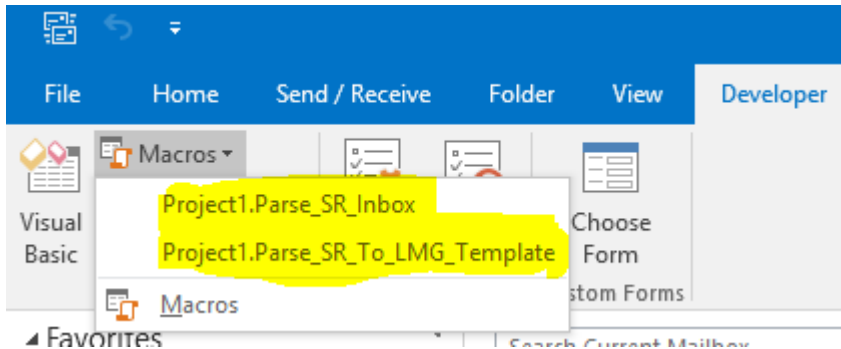


6. In the “References” screen, navigate and put a check on the check box labelled “Microsoft Excel 16.0 Object Library”.



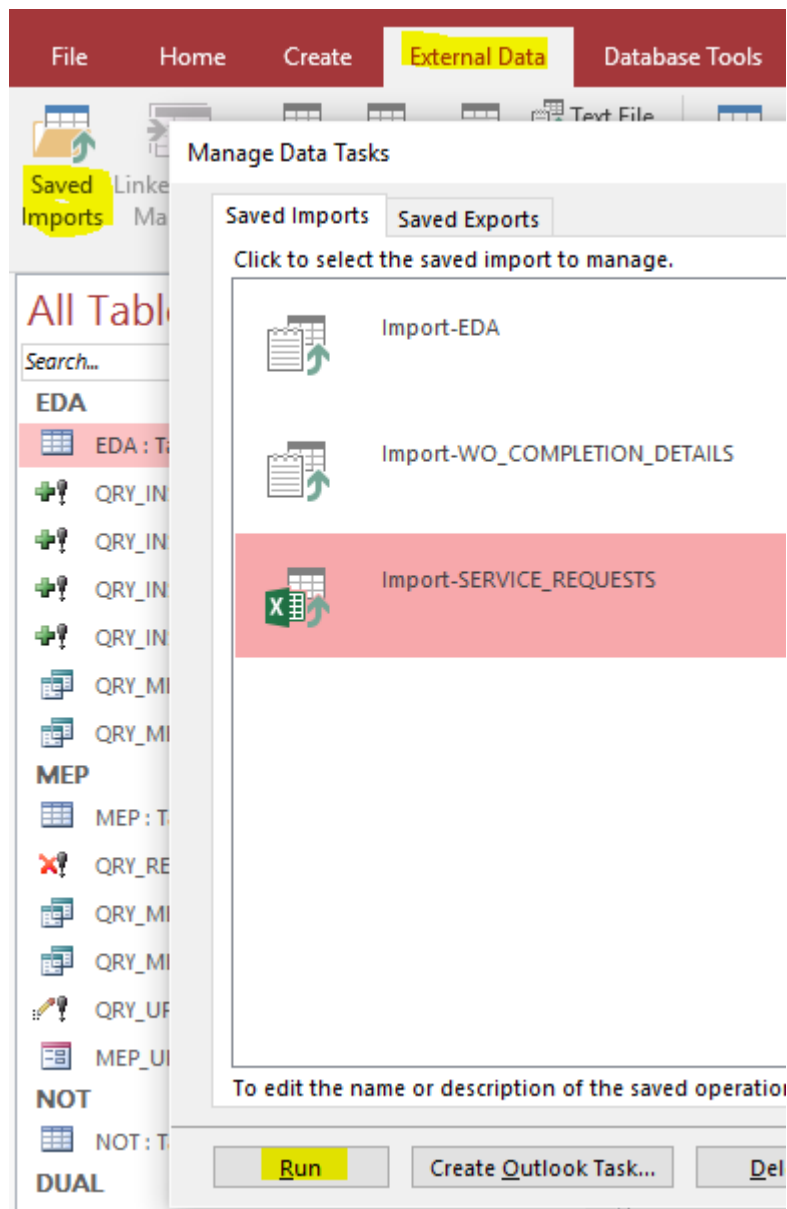
# User Guide

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 WOs 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

Child9:

ID_NUM	REC_NO	RECORD_TY	SERIAL_NO
0	0		

Record: 1 of 1

No Filter Search

**Send SRs**

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

**MEP\_UP\_METER\_DETAILS**

ICP

Child9:

ID_NUM	REC_NO	RECORD_TY	SERIAL_NO	METER_COMPONENT_TYPE_CHANNEL	METER_TY
0	0				

Record: 1 of 1

No Filter Search

**Send SRs**

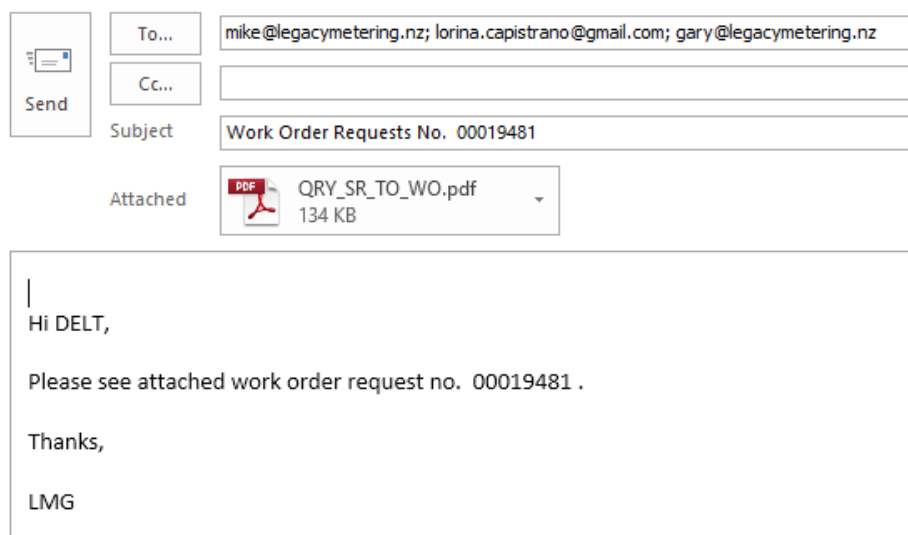
**Microsoft Access**

Now outputting 'QRY\_SR\_TO\_WO' to a mail message

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**

- 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

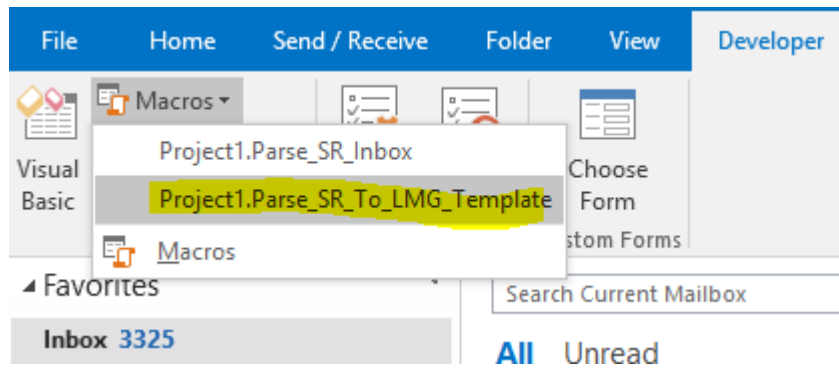
ID	Email_Address	Partner_ID	Partner_Typ
1	mike@legacymetering.nz,lorina.c	DELT	FSP
2	ariel.l.reyes@gmail.com	VEMS	FSP
(New)			

F	G	H	I	J	K	L	M	N	O	P
ISS	Premise_ICP	Customer_Ph	Date_Required	Dog_or_Job_Description	Existi	Existi	Existing_Mete	Existi	Existing_FSP	Existing_C
NOV	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".