

## Create Service Request Activity

A secondary window opens on the lower portion of the table.

Hover over the orange **Actions** button on the lower right-hand side of the table. It will change to light blue.

Click **Create**.

The screenshot displays the EnergyIP Service Request interface. The top navigation bar includes the EnergyIP logo, 'Service Point Details', and various identifiers: 'Udc Id: 0100000056', 'Meter Udc Id: 01E10545', and 'Electric'. There are also notification icons and a 'TRAINING' indicator. Below the navigation bar are tabs for 'Search', 'Information', 'Device Events', and 'Meter Data'. The main content area is titled 'Service Request (Id: 191201)' and contains a form with the following fields:

Status	Service Point*	Priority	Request Reason
Open	0100000056	3-Medium	
Open Time*	Meter	Severity	Alternative Request Reason
08/27/2020 11:05:19	01E10545	3-Medium	
Due Time	Channel Ref	Category*	Outcome
MM/DD/YYYY hh:mm:ss	763549	Default	
Close Time	Account	Type*	Outcome Reason
MM/DD/YYYY hh:mm:ss		Meter Data Processing	
Data Span Start	Consumer	Sub Type	Alternative Outcome
07/24/2020 00:00:00		Reframe Read	
Data Span End	Agreement	Assignee	Alternative Outcome Reason
07/29/2020 00:00:00		Training	

Below the form are tabs for 'Activities', 'Attributes', 'Event Logs/Notes', 'Solutions', and 'Attachments'. The 'Activities' tab is active, showing a table with columns: Ref, Last Update Time, Description, Type, Sub Type, Status, Outcome, and an 'Action' dropdown menu. The table currently contains 'No Records'. The 'Action' dropdown menu is open, showing options: Create, Edit, View, Assign, Assign To Me, and Close. The 'Create' option is highlighted with a red box.

The **Activity** table opens.

The screenshot shows the EnergyIP Activity form. The **Status\*** field is highlighted with a red box and contains the value "Open". The **SR\*** field contains the value "191201". Other fields include **Priority** (3-Medium), **Planned Start**, **Requested Start**, **Actual Start**, **Data Span Start**, **Data Span End**, and **Is Billable**. The **Current Owner** is set to "TRAINING" and the **Team** is "Default\_Queue".

The **Status\*** field defaults to *Open*.

The **SR\*** field populates with the Service Request number created while saving the Service Request form.

Set the **Data Span Start** date and time.

*Note: This must be identical to the date and time entered in the Service Request form.*

Click the **calendar** icon.

The screenshot shows the EnergyIP Activity form. The **Data Span Start** field is highlighted with a red box and contains a date and time. A red arrow points to the calendar icon next to the field. Other fields include **Status\*** (Open), **SR\*** (191201), **Priority** (3-Medium), **Planned Start**, **Requested Start**, **Actual Start**, **Data Span End**, and **Is Billable**. The **Current Owner** is "TRAINING" and the **Team** is "Default\_Queue".

A pop-up calendar window appears.

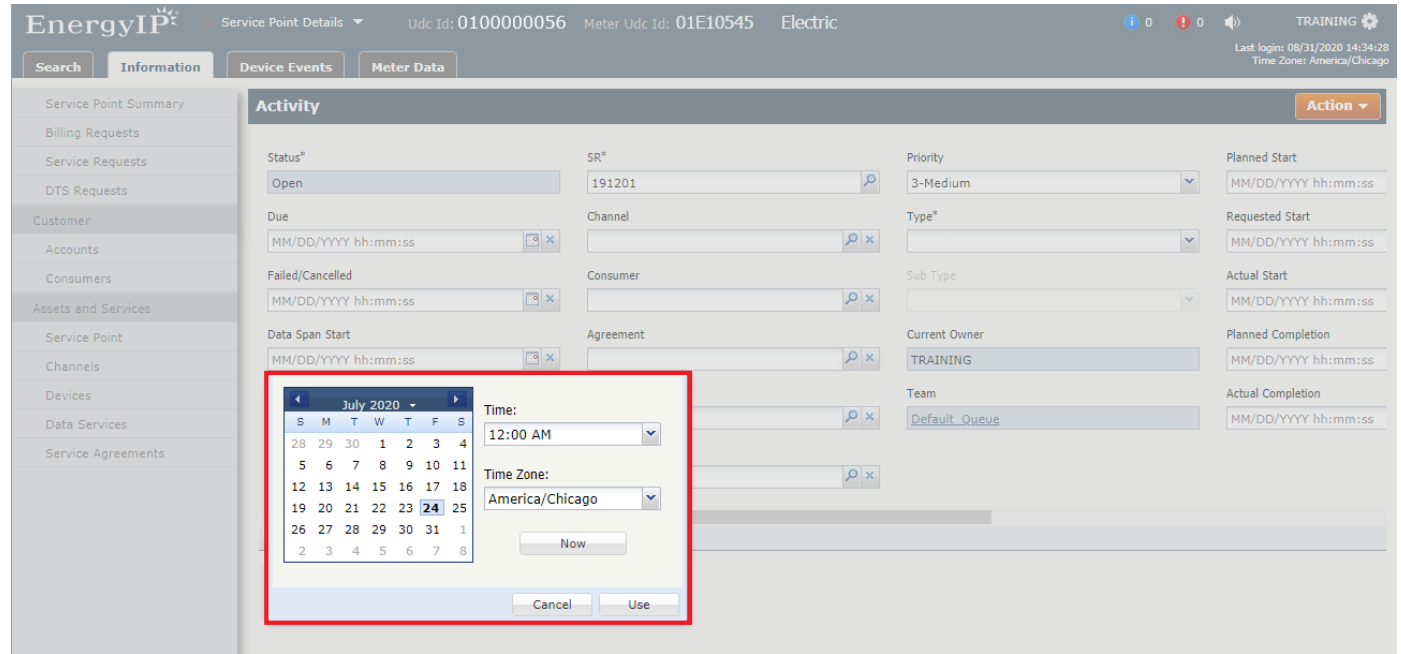
Navigate to the date when the meter reframe process should begin.

Set the **Time** field to **12:00 AM** using the dropdown option.

**Time/Zone** is always set as *American/Chicago*.

Click **Use** to save the Data Span Start.

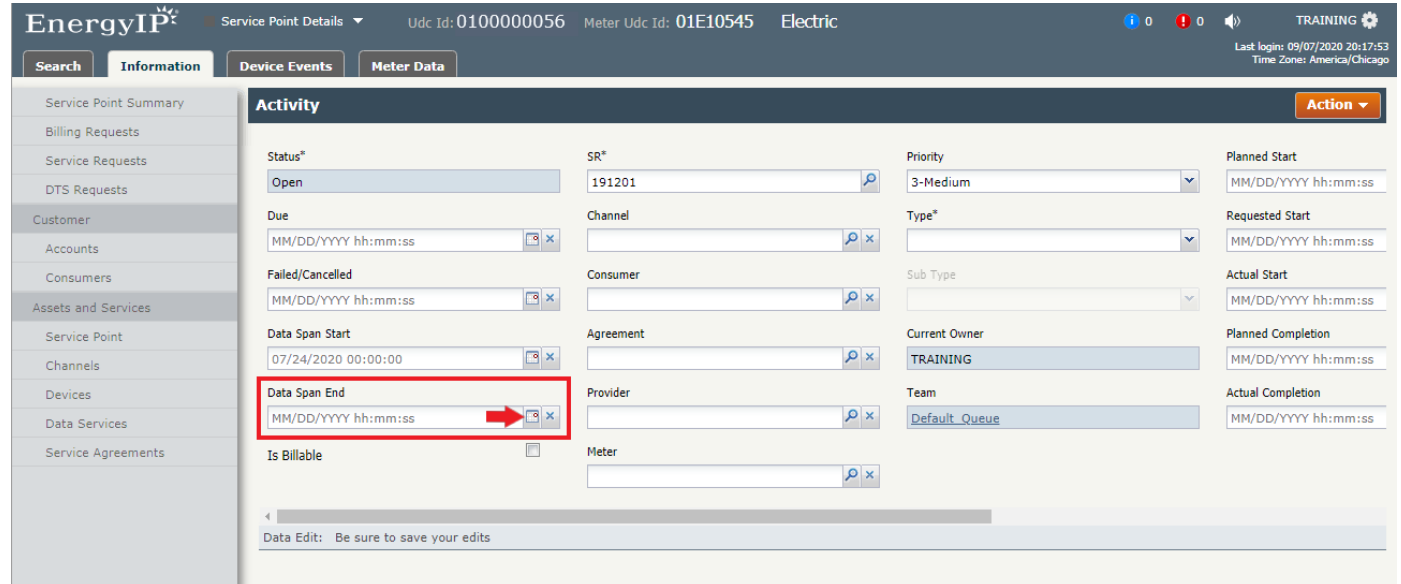
*In the example, the Data Span Start is set to July 24, 2020 beginning at 12:00 AM.*



Set the **Data Span End** date and time.

*Note: This must be identical to the date and time entered in the Service Request form.*

Click the **calendar** icon.



A pop-up calendar window appears.

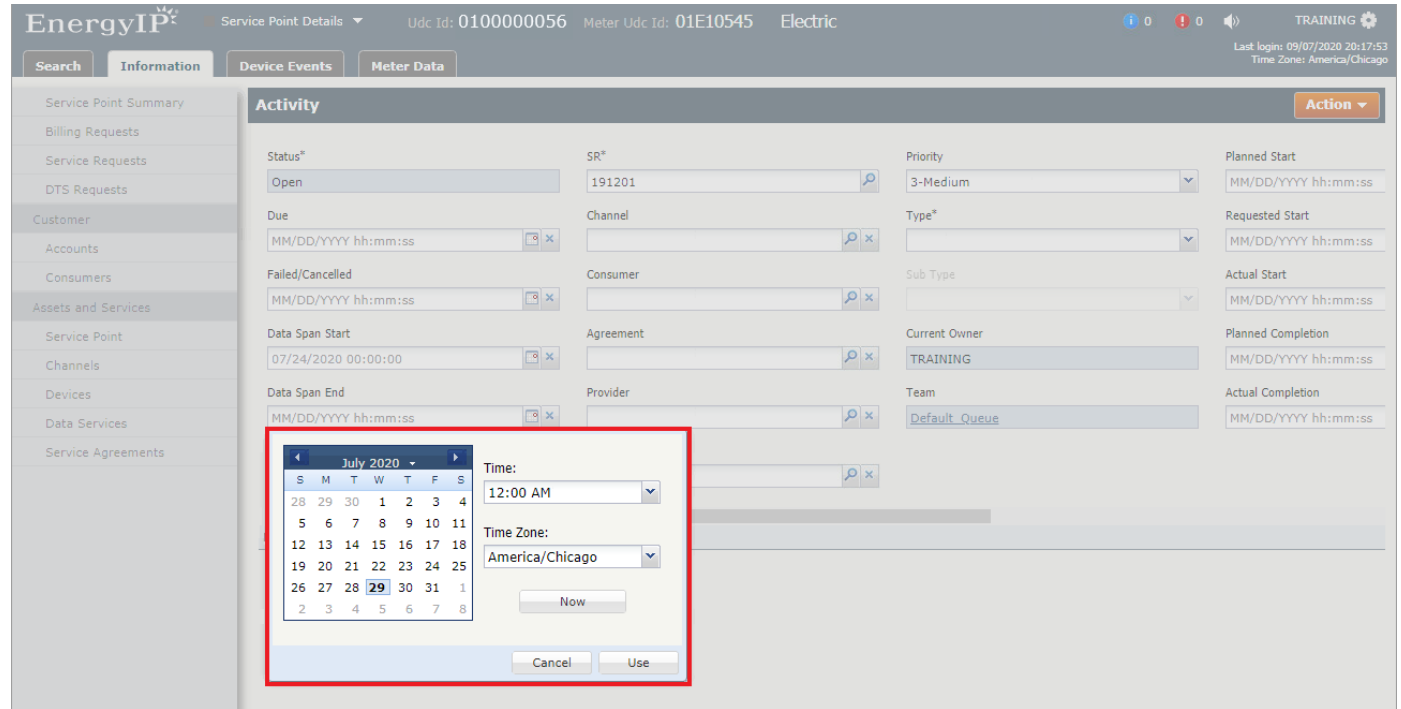
Navigate to the date when the meter reframe process should end.

Set the **Time** field to **12:00 AM** using the dropdown option.

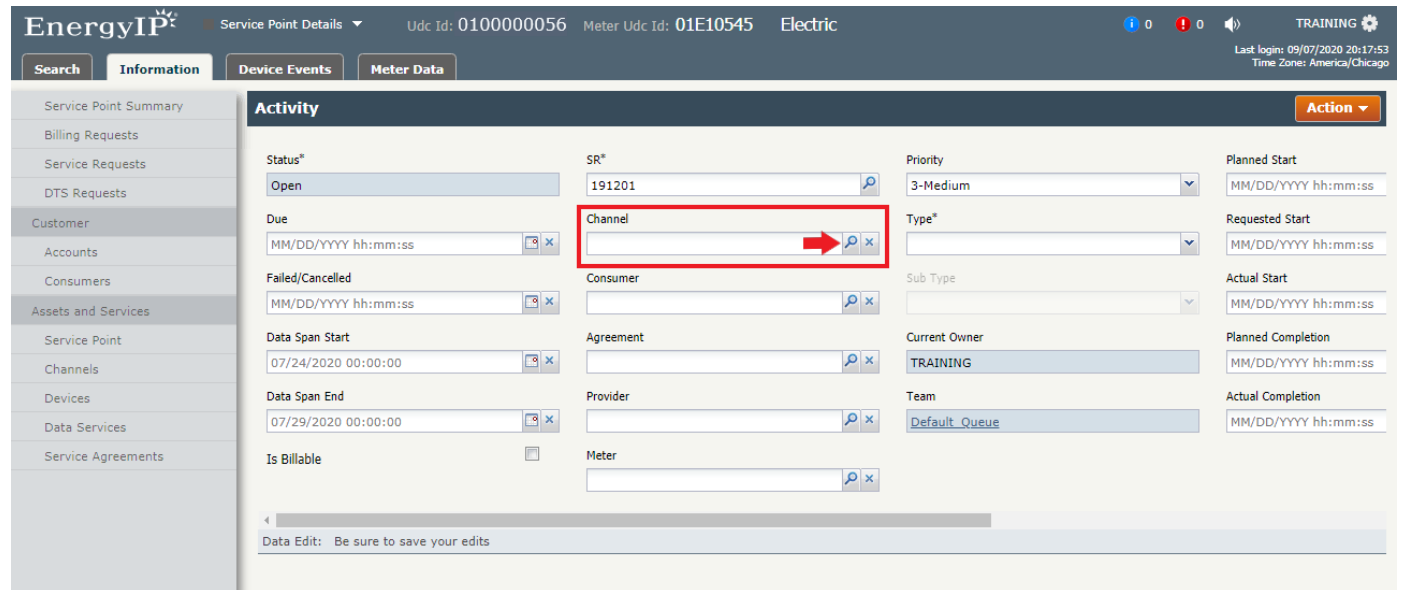
**Time/Zone** is always set as *American/Chicago*.

Click **Use** to save the Data Span End.

*In the example, the Data Span End is set to July 29, 2020 beginning at 12:00 AM.*



At **Channel**, click the magnifying glass to enter the Interval Channel Reference Number.



A pop-up window appears.

At **Ref**, enter the *Interval Channel Reference Number*.

Click **Search**.

The Channel Reference record appears in the lower portion of the table.

Select the Channel by clicking anywhere in the line.

Click the **Use** button in the lower right-hand corner of the table to populate the Channel Reference Number field in the Service Request form.

EnergyIP Service Point Details Udc Id: 0100000246 Meter Udc Id: 01E10545 Electric

Search Information Device Events Meter Data

Activity

Channel

Ref: 763549 Type: Udc Id: Name: Measurement Type:

Interval Length:

More Fields

Search Reset

Ref	Type	Udc Id	Name	Channel Number	Virtual	Status	Service Point UDC Id	Last Update Time
763549	Interval Data	KWH Del 15 Interval Read		1	N	Active	010000056	08/02/2019 09:07:03

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Use Cancel

At **Meter**, click the magnifying glass to enter the Meter Number.

The screenshot shows the EnergyIP Service Request form. The form is titled "Service Request" and has an "Action" button in the top right corner. The form is divided into several sections:

- Status:** Open
- Open Time\*:** 08/27/2020 11:05:19
- Due Time:** MM/DD/YYYY hh:mm:ss
- Close Time:** MM/DD/YYYY hh:mm:ss
- Data Span Start:** 07/24/2020 00:00:00
- Data Span End:** 07/29/2020 00:00:00
- Service Point:** 0100000056
- Meter:** (This field is highlighted with a red box and a red arrow pointing to the magnifying glass icon.)
- Channel Ref:**
- Account:**
- Consumer:**
- Agreement:**
- Priority:** 3-Medium
- Severity:** 3-Medium
- Category\*:**
- Type\*:**
- Sub Type:**
- Assignee:**
- Request Reason:**
- Alternative Request Reason:**
- Outcome:**
- Outcome Reason:**
- Alternative Outcome:**
- Alternative Outcome Reason:**

At the bottom of the form, there is a "Data Edit" section with the text "Be sure to save your edits" and "Save" and "Cancel" buttons.

A pop-up window appears.

At **Udc Id**, enter the Meter Number.

Click **Search**.

The meter record appears in the lower portion of the table.

Select the meter by clicking anywhere in the line.

Click the **Use** button in the lower right-hand corner of the table to populate the Meter Number field in the Service Request form.

EnergyIP Service Point Details Udc Id: 0100000056 Meter Udc Id: 01E10545 Electric

Search Information Device Events Meter Data

Service Point Summary

Billing Requests

Service Requests

DTS Requests

Customer

Accounts

Consumers

Assets and Services

Service Point

Channels

Devices

Data Services

Service Agreements

**Meter**

Ref:  Type: Meter Sub Type:  Udc Id: 01E10545 Device Class Id:

Make:

More Fields

Search Reset

Ref	Type	Sub Type	Last Update Time	Udc Id	Device Class	Make	Model	Mfg Seri...	Mfg Lot ...	Location...	Purchas...
232419	Meter	Electric	07/17/2020 11:29:19	01E10545	Electric Meter	ELSTER	E-REX 2...				

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Use Cancel

Set **Type\***, select *Meter Data Processing* from the dropdown menu.

Set **Sub Type** to *Reframe Read*.

Click **Save** in the lower right-hand corner of the table.

Click **Save**.

EnergyIP Service Point Details Udc Id: 0100000056 Meter Udc Id: 01E10545 Electric

Search Information Device Events Meter Data

Service Point Summary

Billing Requests

Service Requests

DTS Requests

Customer

Accounts

Consumers

Assets and Services

Service Point

Channels

Devices

Data Services

Service Agreements

**Activity**

Status\* Open SR\* 191201 Priority 3-Medium Planned Start MM/DD/YYYY hh:mm:ss

Due MM/DD/YYYY hh:mm:ss Channel 763549 Type\* Meter Data Processing Requested Start MM/DD/YYYY hh:mm:ss

Failed/Cancelled MM/DD/YYYY hh:mm:ss Consumer Sub Type Reframe Read Actual Start MM/DD/YYYY hh:mm:ss

Data Span Start 07/24/2020 00:00:00 Agreement Current Owner TRAINING Planned Completion MM/DD/YYYY hh:mm:ss

Data Span End 07/29/2020 00:00:00 Provider Team Default\_Queue Actual Completion MM/DD/YYYY hh:mm:ss

Is Billable Meter 01E10545

Data Edit: Be sure to save your edits

Save Cancel