

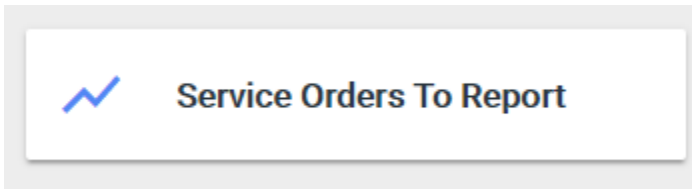
For the Office Reporter

- Office Application - Office Clerk (Report Writer)
 - Sample Report in Microsoft Excel

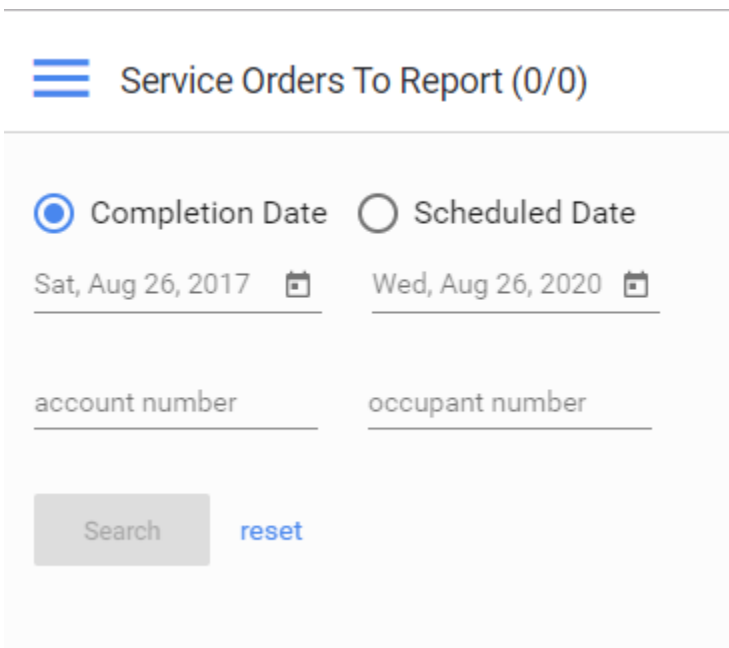
Office Application - Office Clerk (Report Writer)

Office clerks will have the ability to view all the service orders logged in the mCare database.

To access this page user must navigate to the dashboard or menu and click **Service Orders To Report**.



Select the desired date range to be included in the report. The date range can be based on the field completion date or the scheduled date of the service order. Users can filter the list down to a specific account number and/or occupant number.

A screenshot of the "Service Orders To Report" form. The form has a header with a hamburger menu icon and the text "Service Orders To Report (0/0)". Below the header, there are two radio buttons: "Completion Date" (selected) and "Scheduled Date". Under "Completion Date", there is a date field showing "Sat, Aug 26, 2017" with a calendar icon. Under "Scheduled Date", there is a date field showing "Wed, Aug 26, 2020" with a calendar icon. Below the date fields, there are two input fields: "account number" and "occupant number". At the bottom of the form, there is a "Search" button and a "reset" link.

The system will return a list of service orders which can be sorted or further filtered in the application.

Service Orders To Report (7/7)

Completion Date Scheduled Date

Thu, Oct 18, 2018

Thu, Oct 18, 2018

reset

SORT FILTER

CREATION DATE STREET NAME

CALL CODE CYCLE-ROUTE-WALK

REGION SCHEDULED DATE PRIORITY

Ascending Descending

Export

MOVEOU - FORCE #117313

MOVEIN : MOVEIN | ORDER# 117312 | ACCOUNT# 15017-1

L 0d

Creation Date: Oct 18, 2018
Scheduled Date: Oct 17, 2018
Requested Date: Oct 18, 2018
Created By: harris

1032 LAKE DR, WATERTOWN

TWO

Order# 117312 Route 5-47-365 Keys 22-1-2
MOVE IN/OUT

METER INFO

E	0000024136	32535 kWh / 22222 kWh	ALL	G	0731651261	2425 F / 2222 F	G1
+	0000005223	???? kWh / 2222 kWh	?				
W	000558376	0081 F / 2222 F	M35 LL SL				
+	000558376	0081 F / 2222 F	M35 LL SL				

EMETER : E2 | ORDER# 117302 | ACCOUNT# 11883-7

L 0d

25 - 400 11 ST NE, WATERTOWN

Order# 117302 Route 7-62-1190

METER INFO

E	0000028242	14743 kWh / 22222 kWh	Off by 88%, please check reading				
+	66667	14743 kWh / 55555 kWh	?				

Account # 11883-7
Contact ADAM M KRANZ
Created By harris
Created Oct 17, 2018 10:53 AM

Hint: Final Moves are not completed immediately in the CIS after approval, they will be automatically completed by the CIS when the bill is posted to the account.

Example:

Move out - completed and approved in mCare but not completed in the CIS



Service order completed and approved in mCare and completed in the CIS.



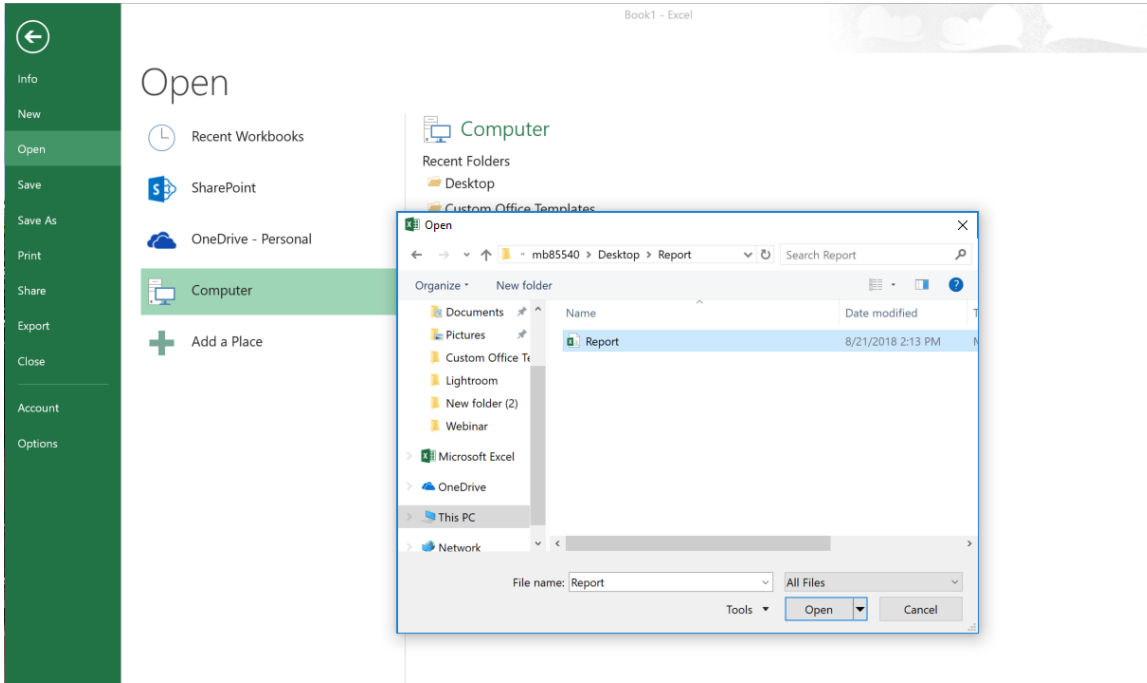
This list can be exported into a .csv file for further filtering and reporting purposes by clicking **Export**. The file can also be used for other 3rd party integrations.

Export

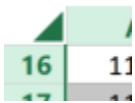
Sample Report in Microsoft Excel

Users can export the service order data into a .csv file which can be opened and manipulated in Microsoft Excel.

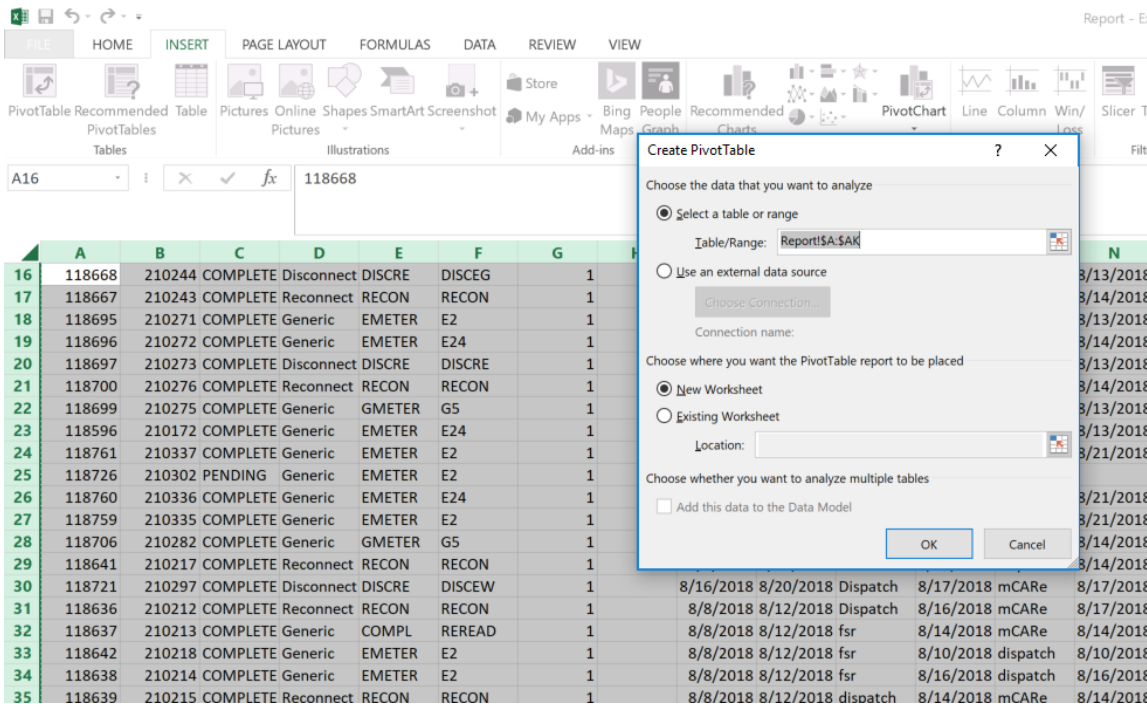
One way to generate a report with graphs is to open the exported file in Excel and make sure the "All Files" option is selected next to the file name.



Select all rows and columns by double-clicking on the top left corner of the table.



Click **Insert PivotTable** and click **Ok**.



To create a quick report:

- Drag "Call Type" into "ROWS"
- Drag "Number of" into "VALUES"
- Drag "Completion user" into "Filter"

PivotChart Fields ▼ ×

Choose fields to add to report:



- Call Number
- Call Status
- Order Type
- Call Code
- Call Type**
- Number of**
- Linked to
- Required date
- Scheduled date
- Completion user**
- Completion date
- Approval User
- Approval Date
- Approval Failed
- Caller name
- Priority
- Short note

Drag fields between areas below:

▼ FILTERS

Completio... ▼

||| LEGEND (SE...

≡ AXIS (CATE...

Call Type ▼

Σ VALUES

Count of N... ▼

Select the two columns.


Row Labels	Count of Number of
DISCEG	1
DISCEW	1
DISCRE	1
DISCWS	1
E15	1
E16	1
E2	39
E21	1
E24	10
E6	2
FORCE	11
G11	1
G5	10
G9	2
MOVEIN	17
RECON	26
REREAD	4
W10	1
W5	3
W6	1

Click the **Insert** tab and then click **Recommend Chart**.

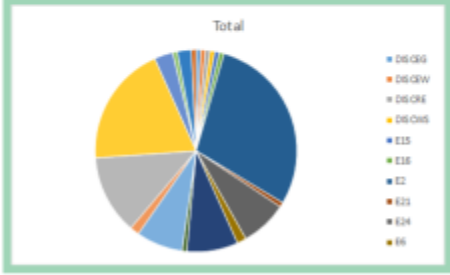
Insert Chart

All Charts

- Recent
- Templates
- Column
- Line
- Pie**
- Bar
- Area
- X Y (Scatter)
- Stock
- Surface
- Radar
- Combo




Pie



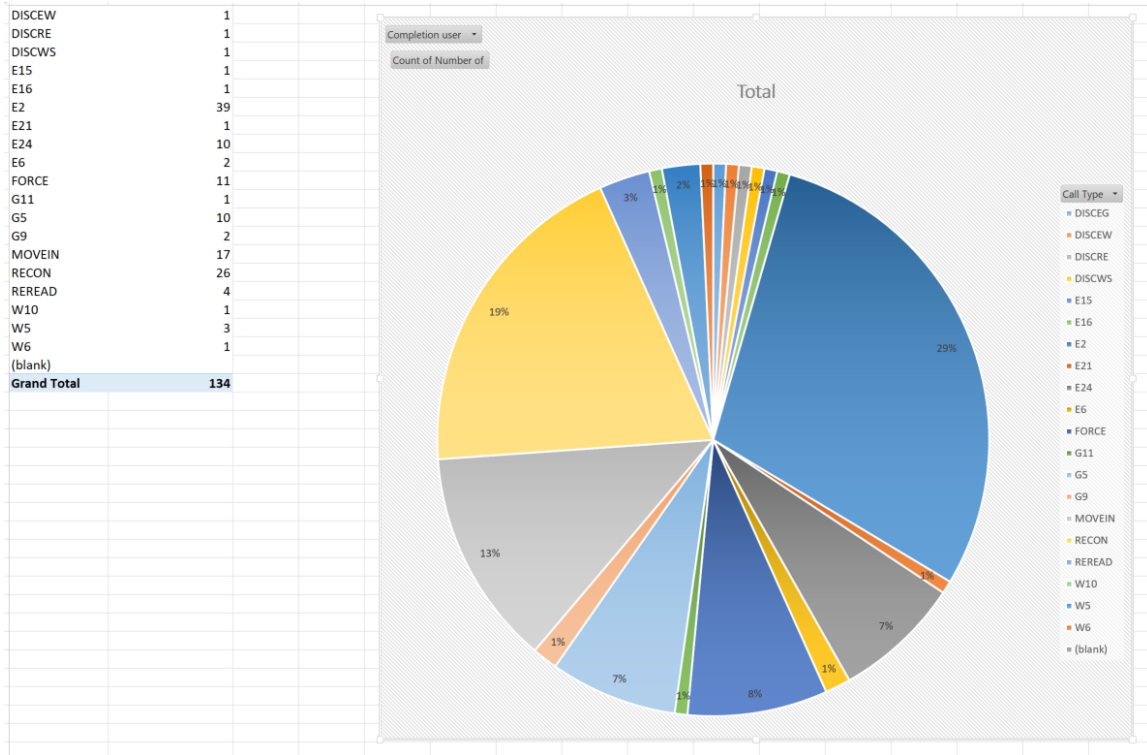
Total

- DISCEG
- DISCEW
- DISCRE
- DISCWS
- E15
- E16
- E2
- E21
- E24
- E6

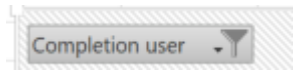
To provide more details click  .



Users will now see the total breakdown of completed service orders by call type.



Users can apply a filter to see the breakdown based on the FSR who completed the service orders by clicking the button.



The result will look like the chart below:

Completion user mCARE

Row Labels	Count of Number of
E2	4
E21	1
E24	1
G5	4
RECON	3
Grand Total	13

