

# DSI Training for Goodwill

Account: GCNA/GIMV



Oct 27, 2023

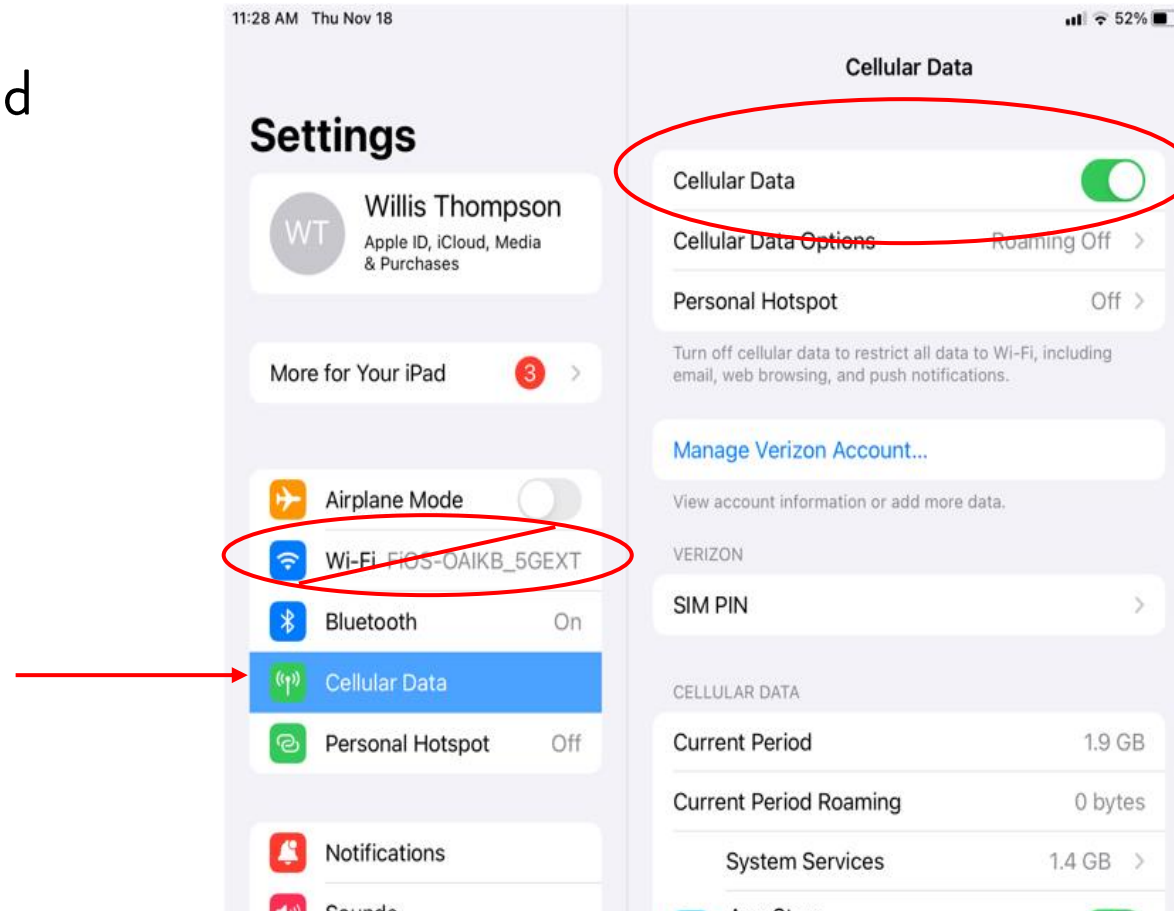


- DSI Setup
  - Cell Data vs Wi-Fi
  - DSI on iPad screen
  - Landscape Orientation
- DSI Operations
  - Logging In and Data Replication
  - Overview of Main Screen
  - Searching Work Orders
  - Creating Work Orders
  - Adding Photos to Work Orders
  - Status Work Orders
  - Closing Work Orders
  - Non-Applicable Sections

- IT Equipment and Applications
  - Keep iPad up to date
  - When in doubt, reach out
  - For issues regarding your physical device/iPad, contact Goodwill IT

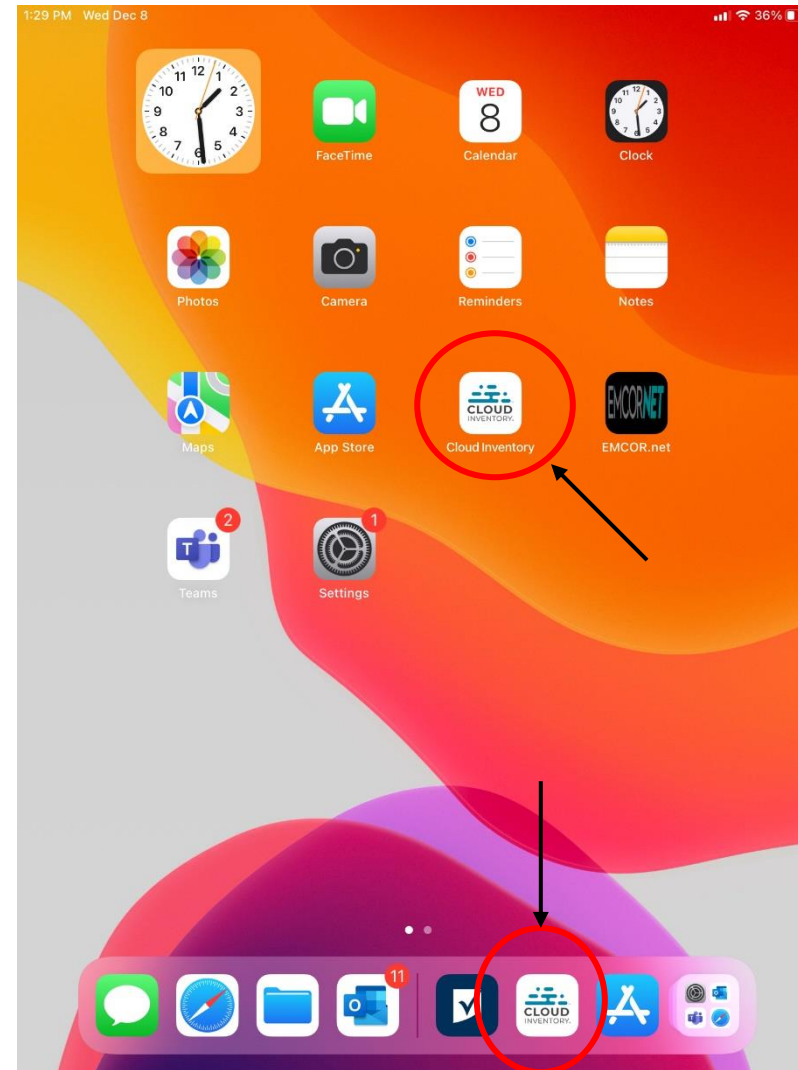
# Wi-Fi vs Cellular Data

- Use Cell Data where possible, and turn Wi-Fi off
- If using Wi-Fi, make sure Cell Data is OFF



# Choosing DSI on iPad

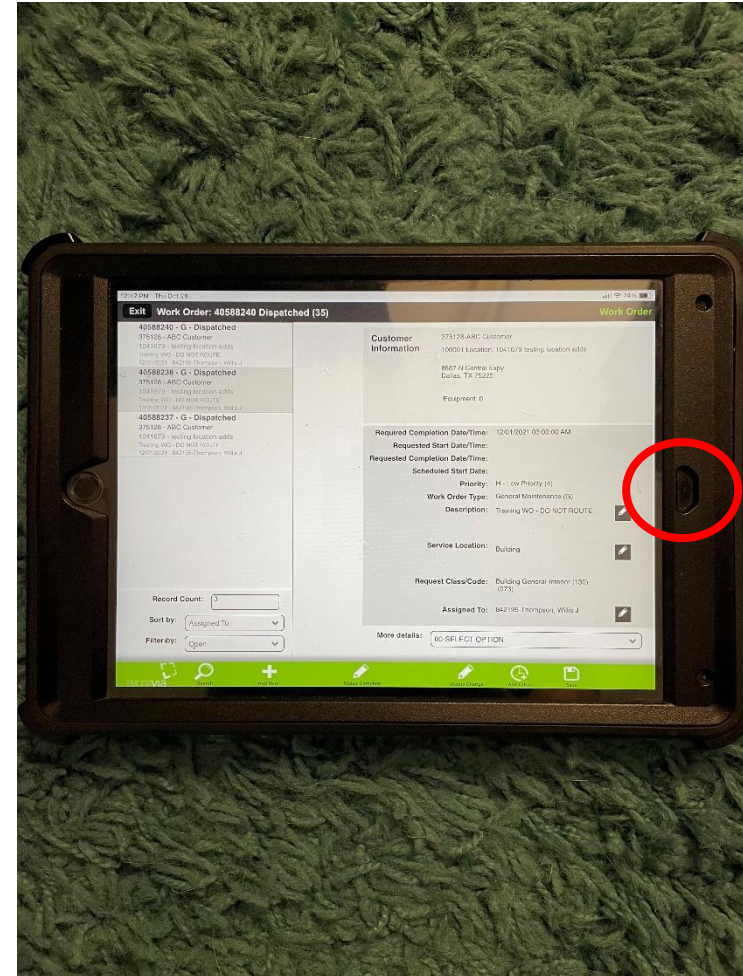
- Choose either Cloud Inventory icon from the home screen or quick access bar at the bottom





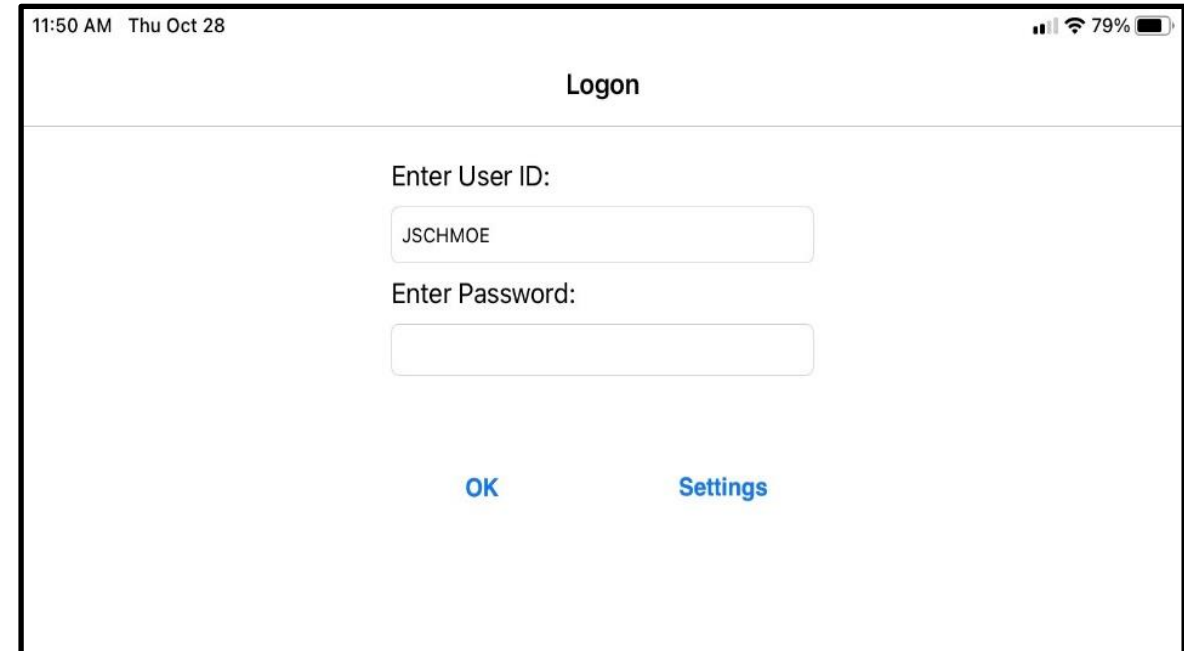
# Viewing in Landscape

- Make sure iPad is in Landscape orientation. Hold horizontal with front facing camera on the right (or left), not at the top.
- If iPad is held vertically, info will be cut off from view.



# Logging Into DSI

- **User ID**
  - Will be provided on startup
  - First initial and last name
  - Ensure no extra spaces at the end of the User ID
- **Password**
  - Will be provided on startup
- **Settings**
  - Steps to get the screen oriented properly to not have overlapping fields and text

A screenshot of a mobile application's logon screen. The status bar at the top shows the time as 11:50 AM on Thursday, October 28, with a battery level of 79%. The screen title is "Logon". Below the title, there are two input fields: "Enter User ID:" with the text "JSCHMOE" entered, and "Enter Password:". At the bottom of the screen, there are two buttons: "OK" and "Settings".

11:50 AM Thu Oct 28 79%

Logon

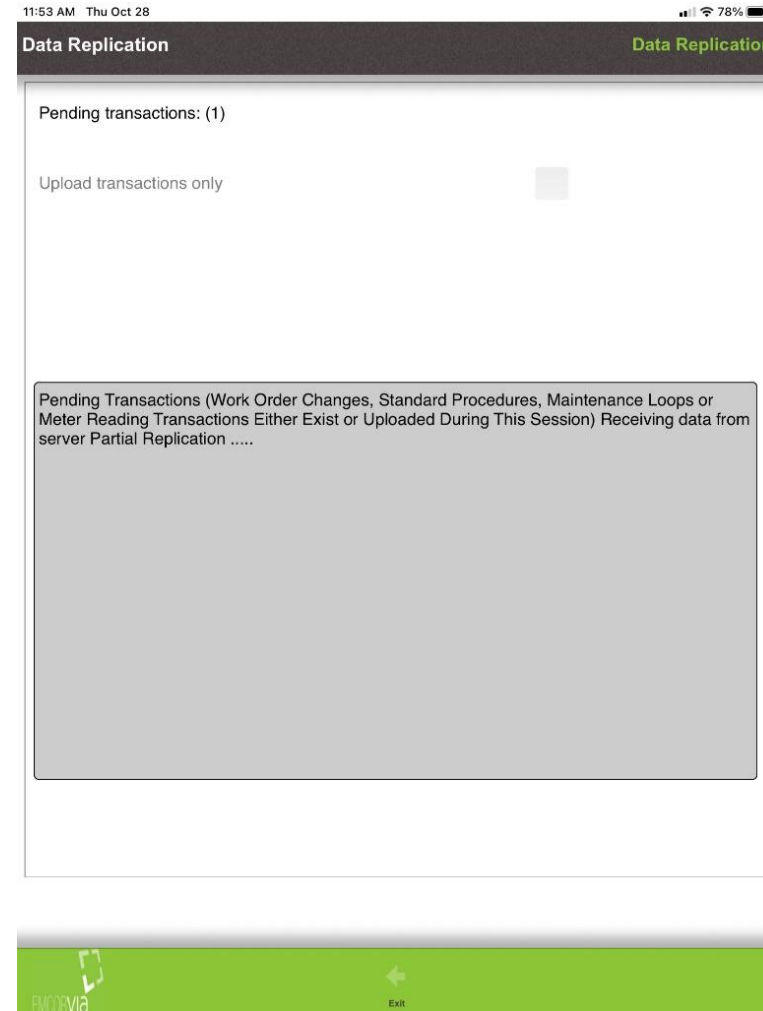
Enter User ID:  
JSCHMOE

Enter Password:

OK Settings

# Data Replication

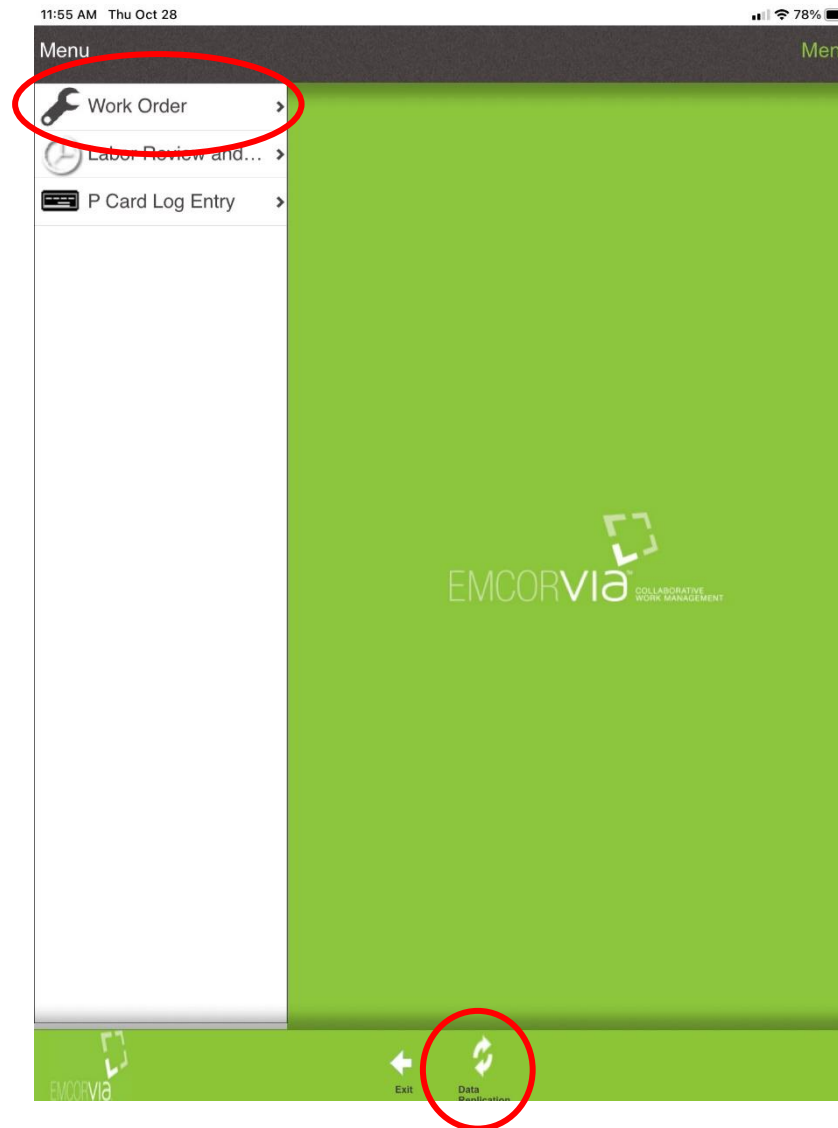
- Data Replication does the following:
  - Updates DSI on your iPad to sync with EMCOR Via (new WOs, updates, etc.)
  - Updates servers with *your* additions/changes to work orders
- May take up to 15 minutes
- Recommend performing Data Replication:
  - 3 times daily (morning, noon, afternoon)
  - If you disconnect from Wi-Fi





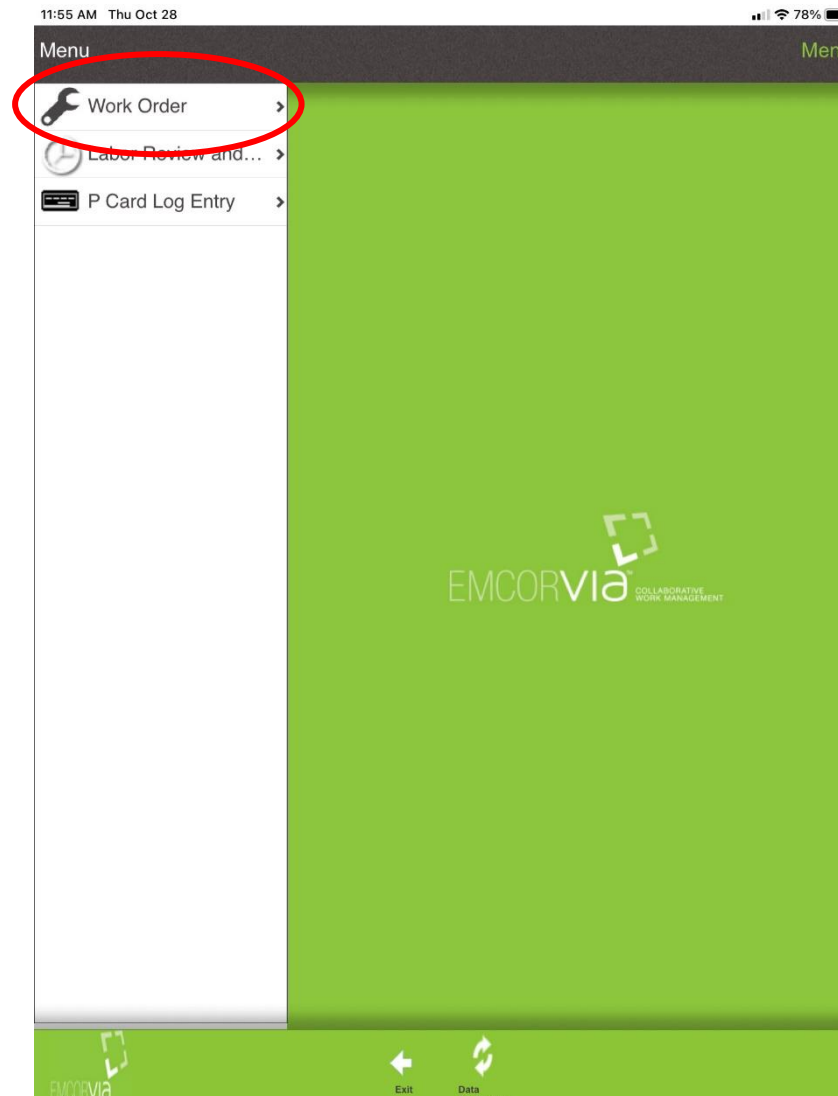
## Data Replication – Cont'd

- Click Data Replication. **Do not leave the DSI interface** while replication is in progress.
- Wait a few minutes.
- Click **Work Order**.
- If you receive an error (partial replication), Data Replication was not completed successfully.
- Click **Data Replication**.
- If you continue to receive errors, contact Goodwill IT.



# DSI Main Screen

- Once Replication is complete, select **Work Order**
  - If you see Work Orders, replication was successful
  - Be patient
  - May take 10 seconds to populate a new screen



# DSI Work Order Panel – Part A

- Work Orders Panel shows:
  - Work Orders available to you
  - Work Order #
  - Status
    - “Dispatched” in this case
  - Description

The screenshot shows a mobile application interface for work orders. At the top, it displays the time '12:55 PM Thu Oct 28' and battery level '73%'. The main header is 'Exit Work Order: 40588240 Dispatched (35) Work Order'. Below this, there is a list of work orders. The first three are highlighted in a red box labeled 'A'. Each entry shows a work order number, customer name, location, and status. The status for all three is 'Dispatched'. Below the list, there are controls for 'Record Count' (set to 3), 'Sort by' (Assigned To), and 'Filter by' (Open). To the right, there is a detailed view for a work order, labeled 'C'. It includes 'Customer Information' (375128-ABC Customer, 100001 Location: 1041679 testing location adds, 8687 N Central Expy, Dallas, TX 75225, Equipment: 0), 'Required Completion Date/Time' (12/01/2021 03:00:00 AM), 'Requested Start Date/Time', 'Requested Completion Date/Time', 'Scheduled Start Date', 'Priority' (H - Low Priority (4)), 'Work Order Type' (General Maintenance (G)), 'Description' (Training WO - DO NOT ROUTE), 'Service Location' (Building), 'Request Class/Code' (Building General-Interior (130) (073)), and 'Assigned To' (842195-Thompson, Willis J). At the bottom, there is a navigation bar labeled 'D' with icons for 'EMCOR VIA', 'Search', 'Add New', 'Status Complete', 'Status Change', 'Add Labor', and 'Save'.

# DSI Work Order Panel – Part B

- Shows current Work Order

**!! Important !!**

Confirm number is correct based on WO# in part A

Easy to confuse which WO you are working on

The screenshot shows a mobile application interface for work orders. At the top, a red header bar contains the text "Exit Work Order: 40588240 Dispatched (35)" and "Work Order". Below this, the main content is split into two columns. The left column displays a list of work orders, with the second one, "40588238 - G - Dispatched", highlighted in grey. This list is labeled with a box 'A'. The right column shows detailed information for the selected work order, including customer information, dates, times, priority, and type. This details section is labeled with a box 'C'. At the bottom of the screen, there is a green navigation bar with icons for search, add new, status complete, status change, add labor, and save. This bar is labeled with a box 'D'. A box 'B' is positioned above the top header bar. At the bottom of the list, there are filters for "Record Count" (set to 3), "Sort by" (Assigned To), and "Filter by" (Open).

# DSI Work Order Panel – Part C

- Work Order Detail
  - Customer Information at top
  - Work Order info in bottom
    - Completion Date
    - Priority
    - Description
    - Assigned To (Service Provider)
  - “More Details” drop down
    - Add comments
      - Use “general” when available
    - View other work order info

The screenshot shows a mobile application interface for a work order. At the top, the status is 'Work Order: 40588240 Dispatched (35)'. Below this is a list of work orders, with the first one selected. Callout 'A' points to the list. Callout 'B' points to the top header area. Callout 'C' points to a detailed view of the selected work order, which includes customer information, completion dates, priority, and assigned personnel. Callout 'D' points to the bottom navigation bar with icons for search, add, status change, and save.

**Work Order Detail View (Callout C):**

- Customer Information:** 375128-ABC Customer, 100001 Location: 1041679 testing location adds, 8687 N Central Expy, Dallas, TX 75225, Equipment: 0
- Required Completion Date/Time:** 12/01/2021 03:00:00 AM
- Requested Start Date/Time:**
- Requested Completion Date/Time:**
- Scheduled Start Date:**
- Priority:** H - Low Priority (4)
- Work Order Type:** General Maintenance (G)
- Description:** Training WO - DO NOT ROUTE
- Service Location:** Building
- Request Class/Code:** Building General-Interior (130) (073)
- Assigned To:** 842195-Thompson, Willis J

**More details:** 00-SELECT OPTION

# DSI Work Order Panel – Part D

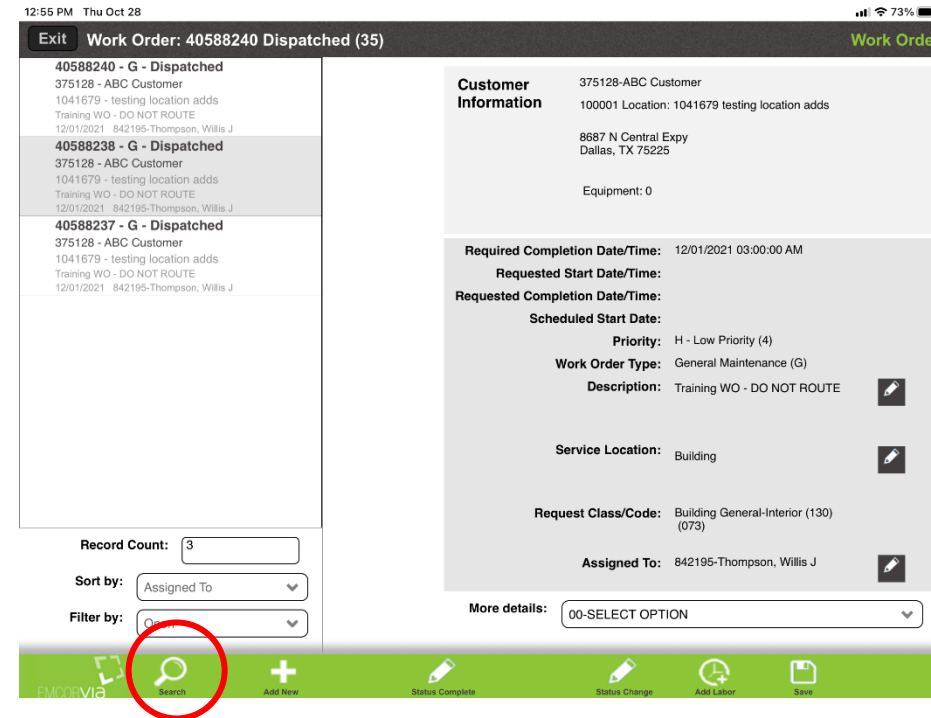
- Option Bar at bottom of screen
  - Search
  - Add New – Create new WO at current Location in field C
  - Status Complete
  - Status Change
  - Add Labor – if not completing work order; can also add labor at WO Completion as well

The screenshot shows a mobile application interface for a work order. At the top, the status is 'Work Order: 40588240 Dispatched (35)'. The main content is divided into two columns. The left column contains a list of work orders, with the second one, '40588238 - G - Dispatched', highlighted. Below the list are filters for 'Record Count' (3), 'Sort by' (Assigned To), and 'Filter by' (Open). The right column shows details for the selected work order, including 'Customer Information', 'Required Completion Date/Time', 'Requested Start Date/Time', 'Requested Completion Date/Time', 'Scheduled Start Date', 'Priority' (H - Low Priority (4)), 'Work Order Type' (General Maintenance (G)), 'Description' (Training WO - DO NOT ROUTE), 'Service Location' (Building), 'Request Class/Code' (Building General-Interior (130) (073)), and 'Assigned To' (842195-Thompson, Willis J). At the bottom, a green option bar contains icons for 'CAM/OCR/VA', 'Search', 'Add New', 'Status Complete', 'Status Change', 'Add Labor', and 'Save'. Callouts A, B, C, and D are placed on the screen: B is at the top status bar, A is at the bottom of the list, C is at the bottom of the details panel, and D is at the bottom of the option bar.



# Search Work Orders

- Press “Search” as circled to the left
- Can only search for Work Orders at locations you CURRENTLY have other work assigned.
- CANNOT search all locations at all times
- Search recently assigned locations



# Search Work Orders Cont'd

- Search Via fields on left
- Any one or multiple of criteria in fields can be used to narrow or expand search function
- Limit search to **Location**
- Press **Clear** in bottom middle to start over
- Press **Search** icon to proceed

9:36 AM Fri Oct 29 61%

### Work Order Search

WO Number:  Description:

Customer:  WO Type:

Location ID:  WO Status:

**Location:**

Equipment:

or

Priority:

Assigned To:

Requester:

Contact:

Sort by:

Request Class:

Request Code:

Enter Dates From To

Required Completion:

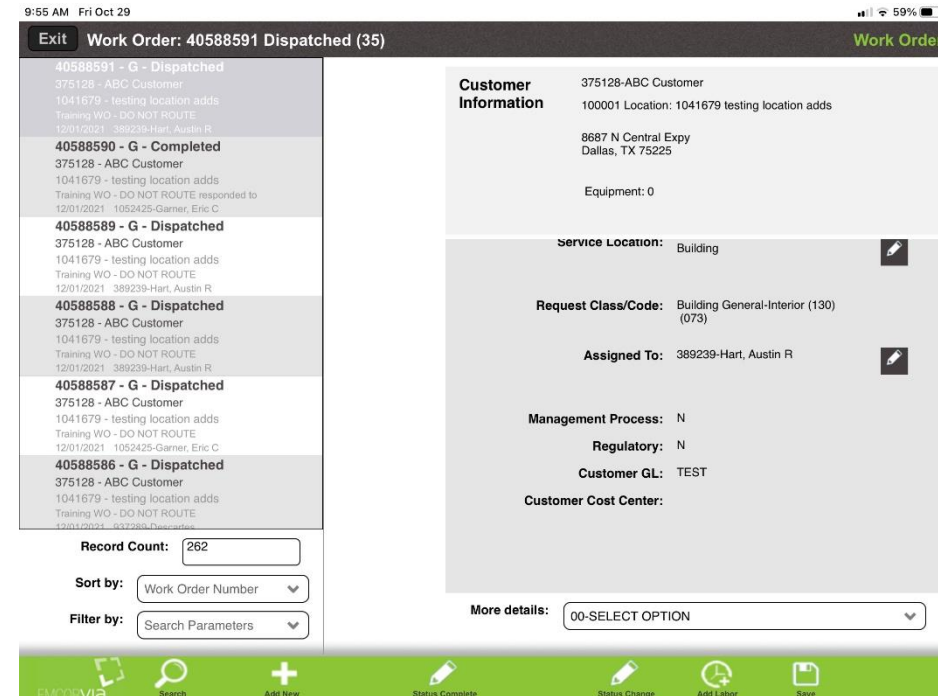
Scheduled Start:

Requested:

EMCOR Via Back Clear Search

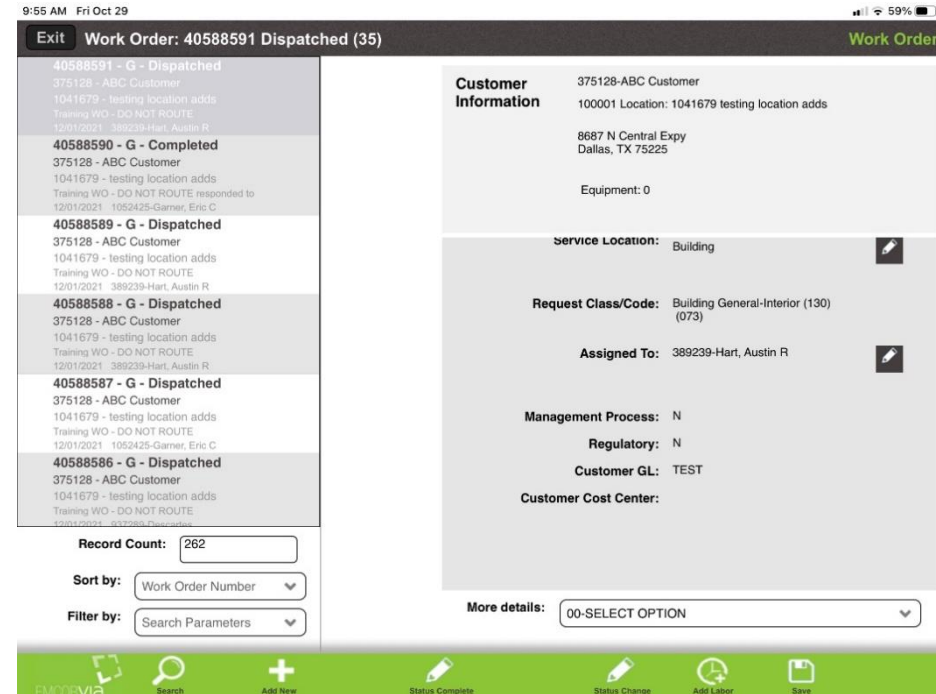
# Search Work Orders Cont'd

- Left Screen: WO search results
- Right Screen: Individual WO detail with WO number in black bar across the top
- Press **Exit** in upper left to leave search results and return to main start screen
  - Press **Work Order** in upper right to return to list of Work Orders assigned to you



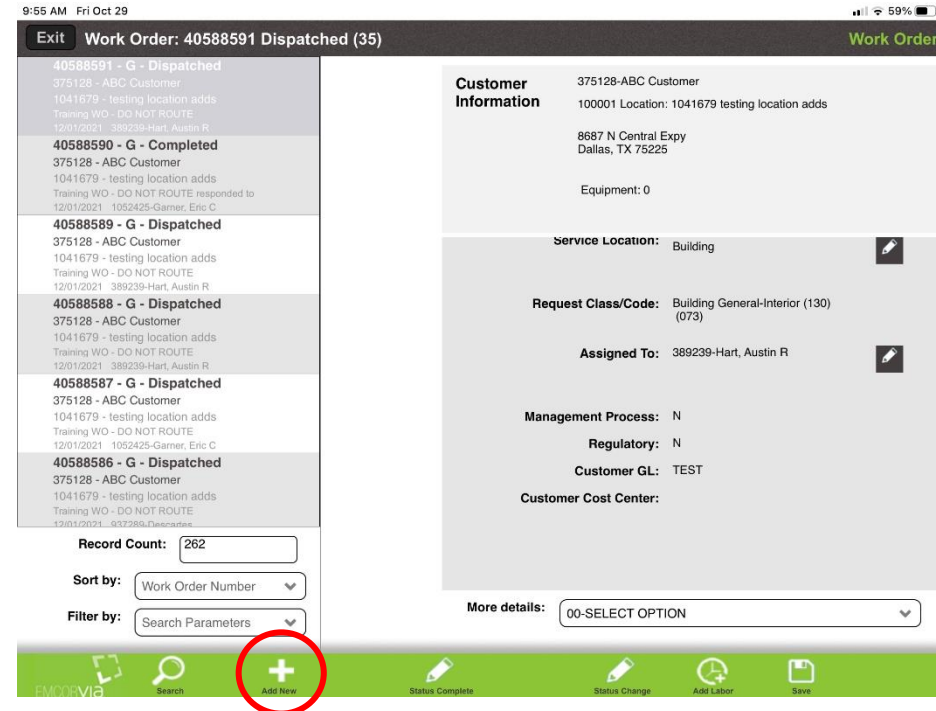
# Search Work Orders Cont'd

- After search results make sure:
  - Work Orders are assigned to correct technician
  - Communicate with others if assigned to another technician



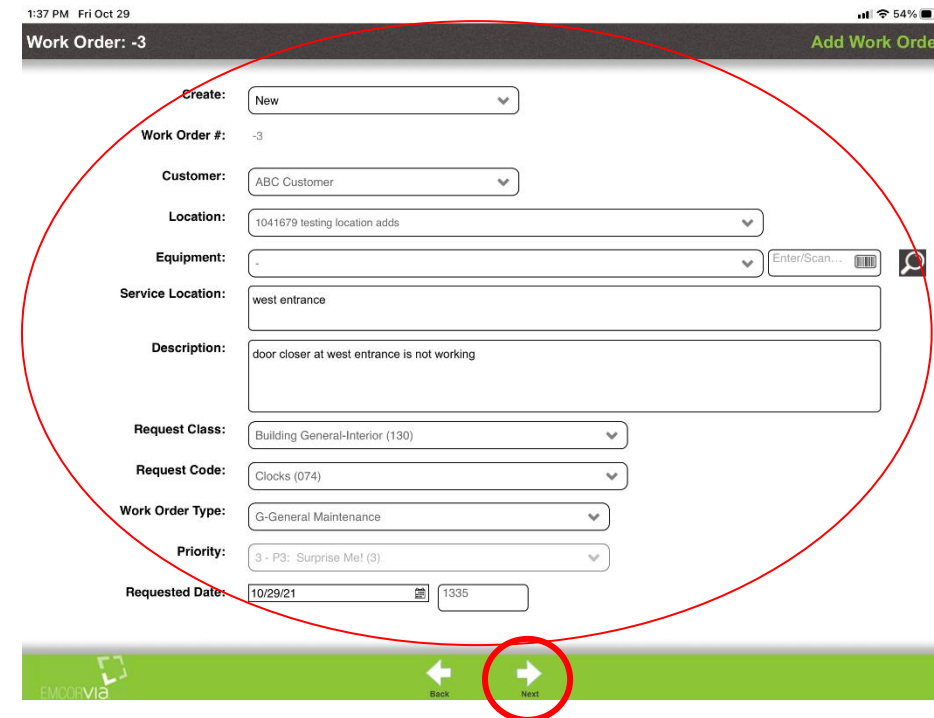
# Creating Work Orders

- Press Add New as circled on bottom menu



# Creating Work Orders Cont'd

- Create new Work Order at another location or create at same location you are on from previous screen
- Enter in the:
  - Location (specific store)
  - Service Location (where in facility)
  - Description
  - Request Class/Code
- Press **Next** to create a new Work Order



1:37 PM Fri Oct 29 54%

Work Order: -3 Add Work Order

Create: New

Work Order #: -3

Customer: ABC Customer

Location: 1041679 testing location adds

Equipment: - Enter/Scan...

Service Location: west entrance

Description: door closer at west entrance is not working

Request Class: Building General-Interior (130)

Request Code: Clocks (074)

Work Order Type: G-General Maintenance

Priority: 3 - P3: Surprise Me! (3)

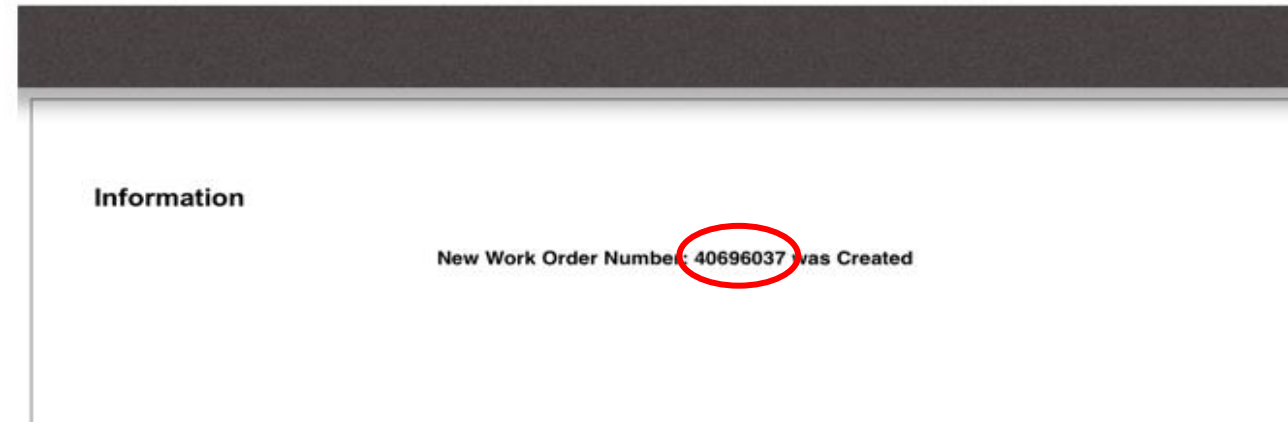
Requested Date: 10/29/21 1335

EMCOR Via Back Next



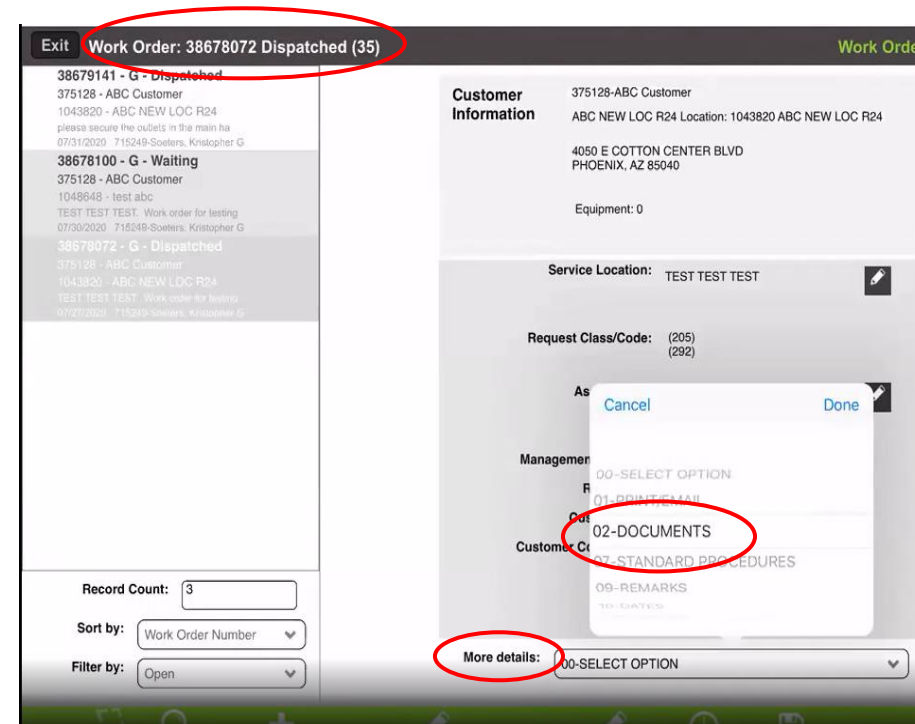
# Work Order Creation

- If WO# shows as 8-digit number, WO was created successfully
- If WO# shows as “-1” “-2” etc., perform these troubleshooting steps:
  - Click Pencil icon next to Description
  - Put in a space (spacebar), lower the keyboard, click checkmark, scroll up and click “Save”
- If you still don’t have a full WO#:
  - Click **Replicate**
  - This is slower than the previous steps.



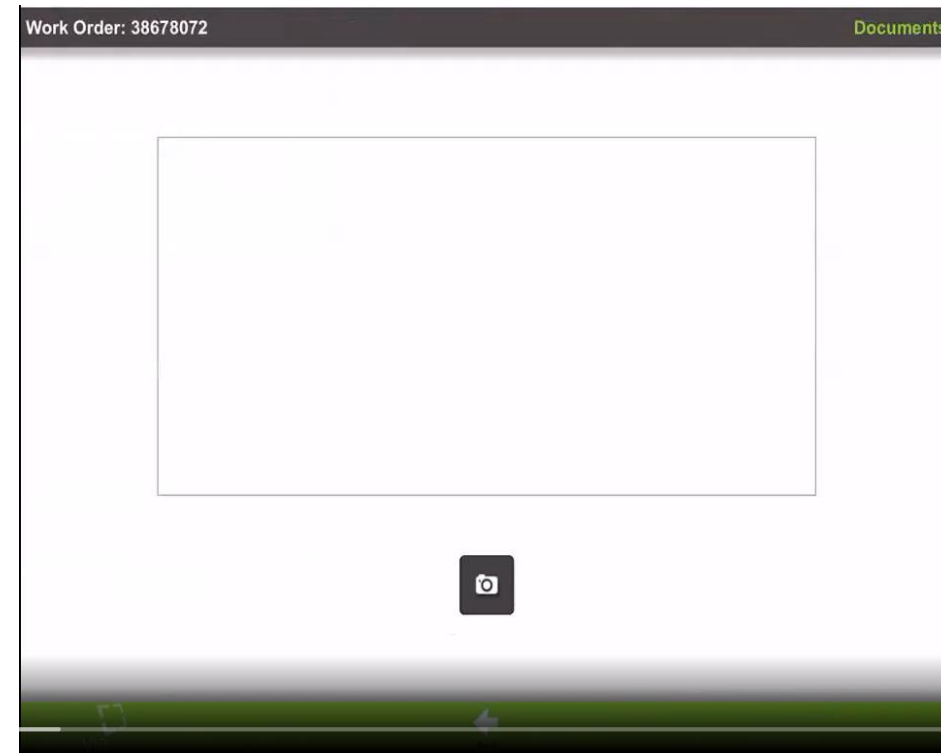
# Adding Photos to Work Orders

- Adding Before and After Photos is a requirement
- Allows for proof that work was completed
- Make sure Work Order across the top is the correct number
- Under **More Details**, choose Documents



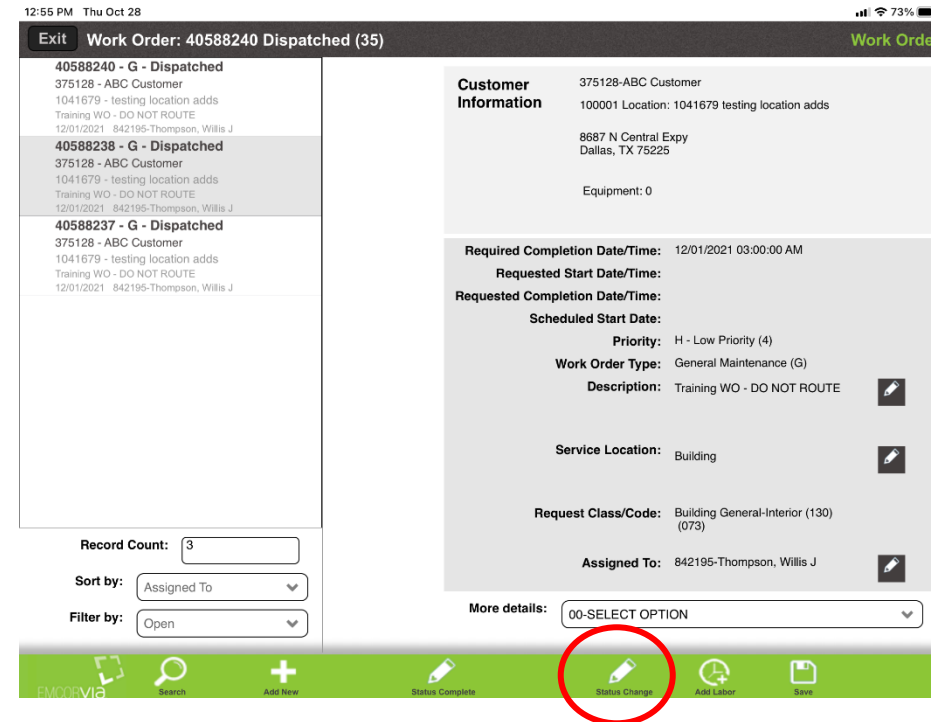
# Adding Photos to Work Orders

- Camera will show as on the picture here
- Line up photo in grey rectangle
- Choose before or after photo
- Take photo



# Status Work Orders (Other than Complete)

- Confirm number across top of the page is the Work Order number you want to status
- Press **Status Change** as circled on bottom menu



# Status Work Orders (Other than Complete)

- Choose:
  - Status Code
  - Date will populate automatically
  - Time will populate automatically
  - Add **Remarks** regarding status change
- Press **No Time Entry** to enter changes
  - If you click **Next**, you will be asked to enter time.

2:21 PM Fri Oct 29  
Work Order: 40588237 Status Change

Status Code: Dispatched (35)

Enter Date: 10/29/21

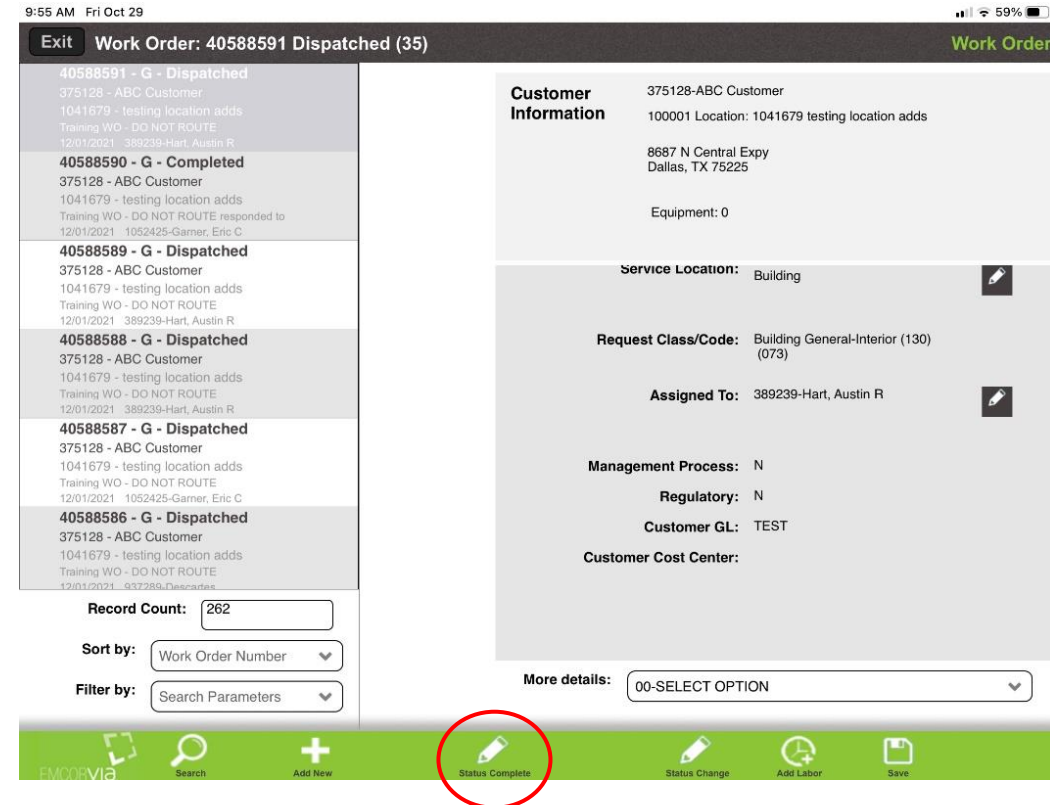
Enter Time: 1421

Remarks:

EMCOR Via Back No Time Entry Next

# Closing Work Orders

- Press Status Complete circled on the bottom menu





# Closing Work Orders

- Press **Next** (no need to change anything that auto-fills)
  - Wait – only press it once
  - May take several seconds
  - All fields must be populated

Work Order: 38679141 Service Data

Work Order Type: General Maintenance (G)

Description: please secure the outlets in t

Equipment: Enter/Scan Equipment

Service Class: Building General-Interior (125)

Service Code: General Building Interior (125)

Action Code: Repair (05)

Safety Related Issue: Yes

BU mapping: No

EMCOR

# Closing Work Orders

- Choose Status Code  
“Completed (99)” from drop down menu
- Add detailed Remarks to describe the work performed
- Press Next

Work Order: 38679141 Status Change

Status Code: 0

Enter Description: Cancel Done

Enter Time: ()

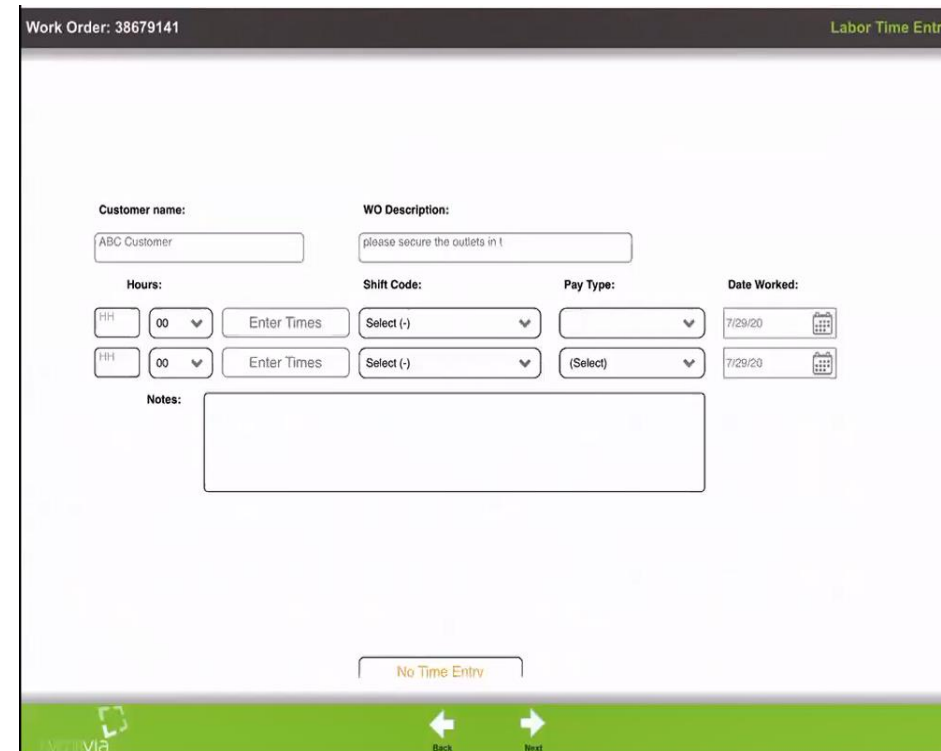
Remarks: Closed with (90)

Remarks: Completed (99)

Navigation: Back No Time Entry **Next**

# Time Entry – For Closing Work Orders

- Shows “GCNA/GIMV” as the Customer Name and WO Description at the top
- Enter time in **Hours**, as Hours and Minutes. Use unit increments of 15 for minutes
- Shift code is 1 Shift/Standard Shift (0)
- Pay Type is 1 – Regular
- Add **Notes** if needed



Work Order: 38679141 Labor Time Entry

Customer name: ABC Customer      WO Description: please secure the outlets in t

Hours: HH:MM      Shift Code: Select (-)      Pay Type: (Select)      Date Worked: 7/29/20

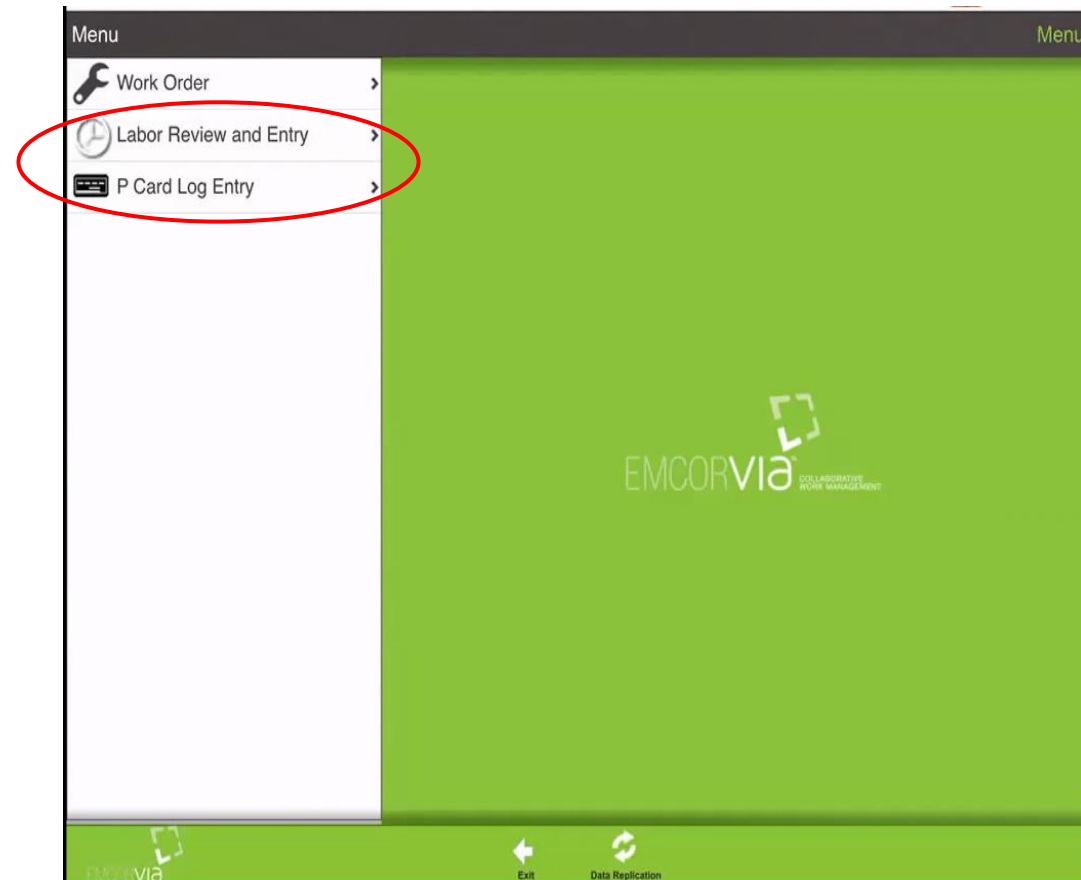
Notes:

No Time Entry

← Back      Next →

# Non-Applicable Sections

- At main start screen:
  - Labor Review and Entry
  - P Card Log Entry
- These options do not apply to Goodwill technicians
  - You do not have to enter any additional time
  - You do not have to enter P Card information





 **EMCOR**  
Facilities Services