SUPERVISOR SMARTDGS GUIDE

March 2013

District of Columbia
Department of General Services

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Entering a Service Request

As an employee of The District Government, you are considered to be a client of the Service Desk system and are able to enter a service request. To do so, you run the Create Maintenance Service Request task which presents the Create Request wizard. The wizard walks you through the following procedure

To get started enter this intranet link: http://SMARTDGS.dc.gov

The following Web page will display.

Sign In
Sign in to your email address without @dc.gov part as your username.

Enter your user name (case-insensitive):

[   ] @dc.gov

Enter your password (case-sensitive):

[   ]   Your password is the same password that you use to log in to your workstation or to check email.

[Sign In]

☐ Remember my user name on this computer

Enter your name and password as instructed to enter the site.

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Approving Service Request

Some requests will need to be approved by a supervisor or business manager before being assigned to a work request. The CSC can approve, reject or forward a service request at this point.

To approve a service request select **DGS Supervisor> Approve Service Request** from the Web central navigator.
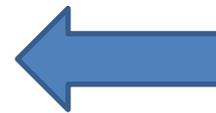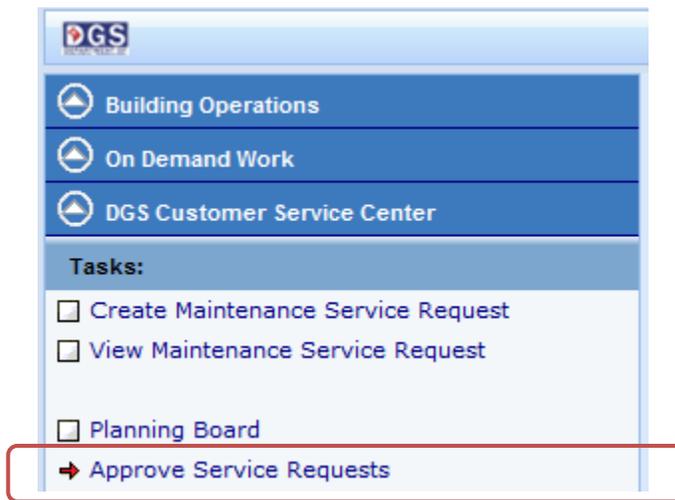
**Approve/Reject Service Request**

Select | Approve | Edit and Approve

Edit and Approve: Approve, Reject, Forward to Safety, Print Work Authorization

Approve: Approve or Rejects Service Request

Select: displays the list of Service Requests that are pending for Approval

1. On the grid under the Select tab, click the "Select" button to display the request information

Select a Request to Approve/Reject

	Service Request ID	▬	
Select		502	
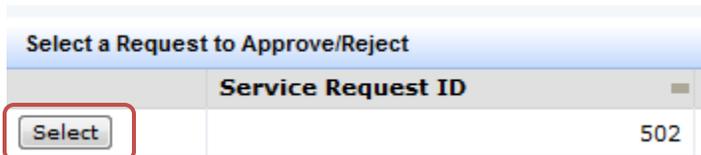
2. This will navigate to the Edit and Approve Tab as for the SLA was configured to do the "Edit and Approve" step. The CSC will have the ability to change any information about the request to make sure it will go to the appropriate work team. CSC also will have the ability to forward the Service Request to the "Safety Group" when needed and print the Work Authorization after the approval
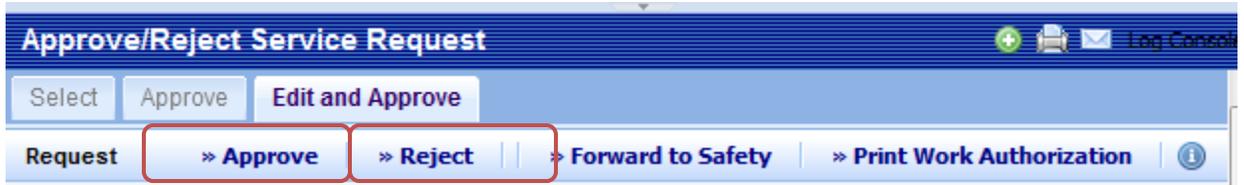
Approve: Approves the Service Request, which will

Reject: Rejects the service request, this closes the Service Request and Archived the Request.
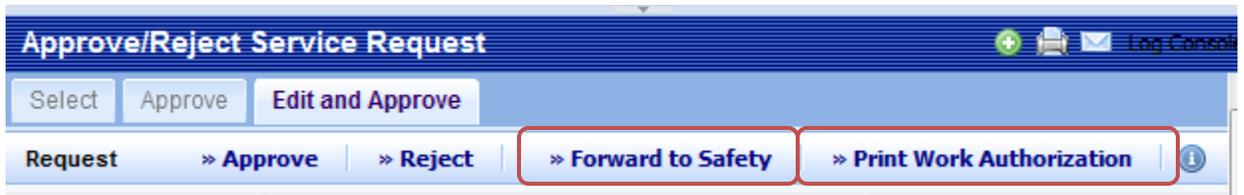
Forward to Safety: Will forward the service request to SAEFTY GROUP

Print Work Authorization: produces a PDF document that can be printed for the Work Authorization

The following fields on the form are editable before approval. This will also determine which "SLA" will be used to continue the ondemand workflow.

Forward to Safety

In certain types of request, Safety Approval is needed. CSC uses this task to forward the request to SAFETY GROUP to determine the safety type of the request.

Clicking this button removes the queue from CSC, and Safety Group Will approve the Service Request and update the request with the appropriate safety type.

Work Team Supervisors

The SLA routes the requests to the appropriate workteams base on parameters defined in the SLA configuration. These parameters could be base on location, problem type, employees or agencies. The Work team Supervisor will manage the Work Orders and Work Requests created when the Service Request was approved.

Estimate and Schedule Work Requests

Once a work request has been created, if the SLA calls for an estimation or scheduling step, you will be able to assign craftspeople, tools, parts, costs, labor hours, etc. to the details of the work request. Select **Building Operations >On Demand Work > DGS Supervisor > Estimate and Schedule** from the Web central navigator.

Schedule: Assigns a Craftsperson, Assign Tools

Estimate: Assigns and Add Estimates for the resources that are going to be used for the Work Request.

Details: Shows the details about the Work Request

Select: Shows the list of Work Requests to be Estimated and Scheduled
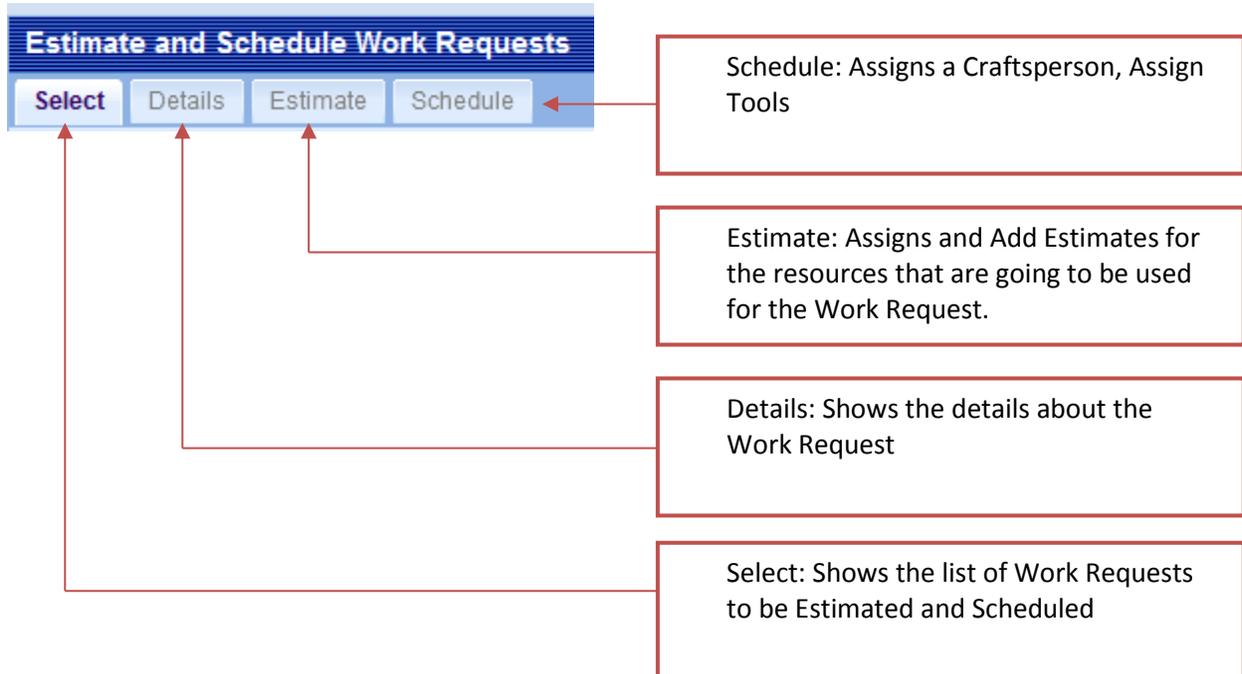
1. Select a Work Request to Estimate/Schedule
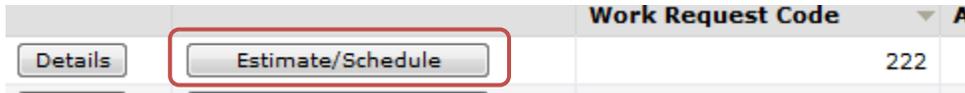
2. Estimate
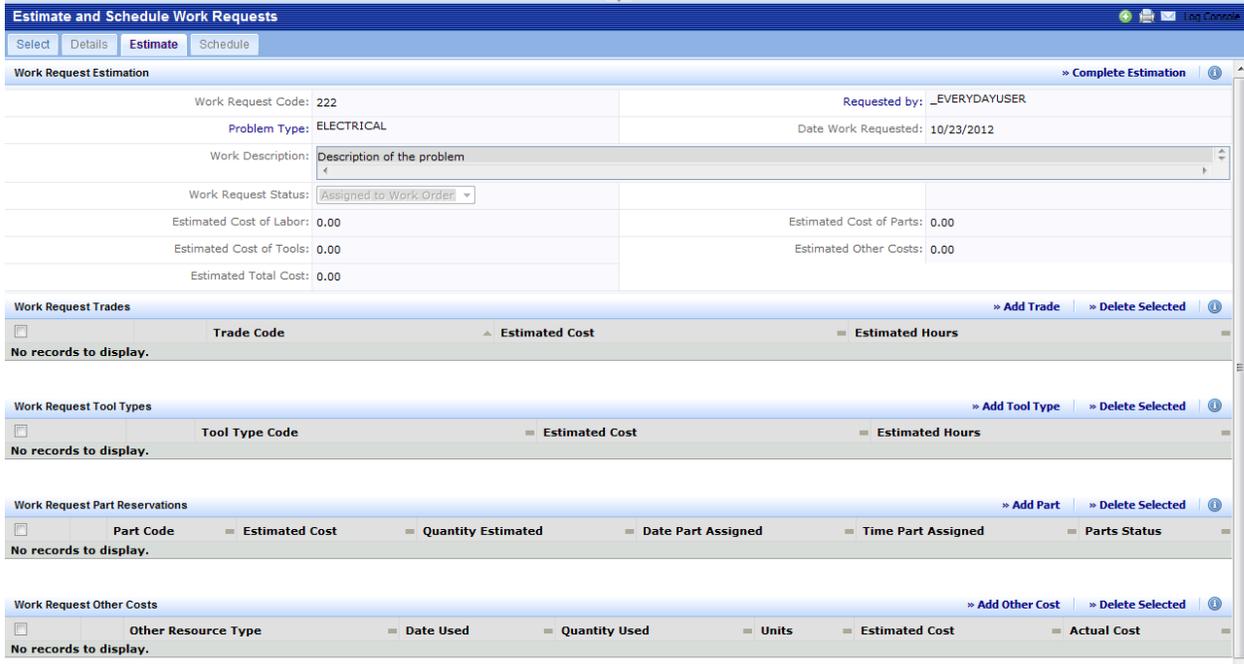
    1.1 Add a trade: on the Work Request Trades click the Add Trade Button

Add Trade Dialog Box

Click the elispis button to select the Trade Type
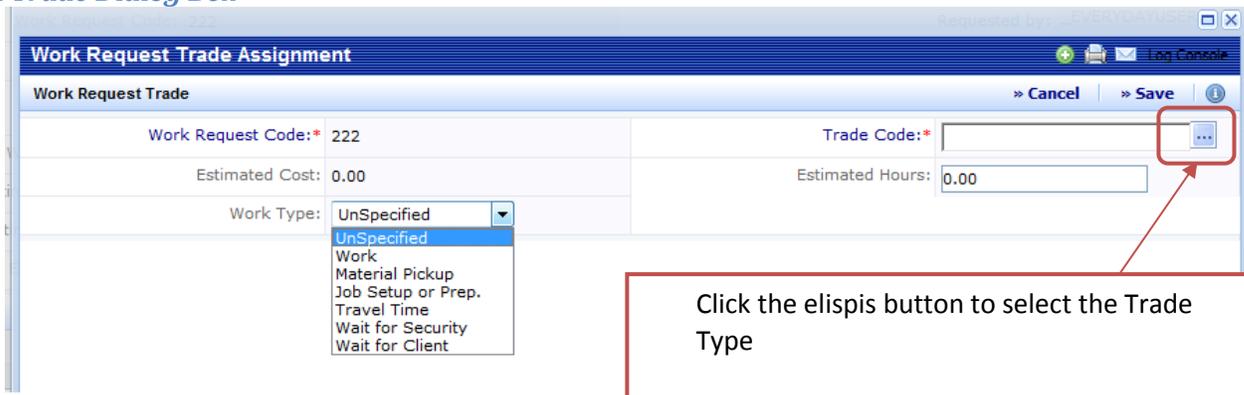
Select Trade Dialog Box
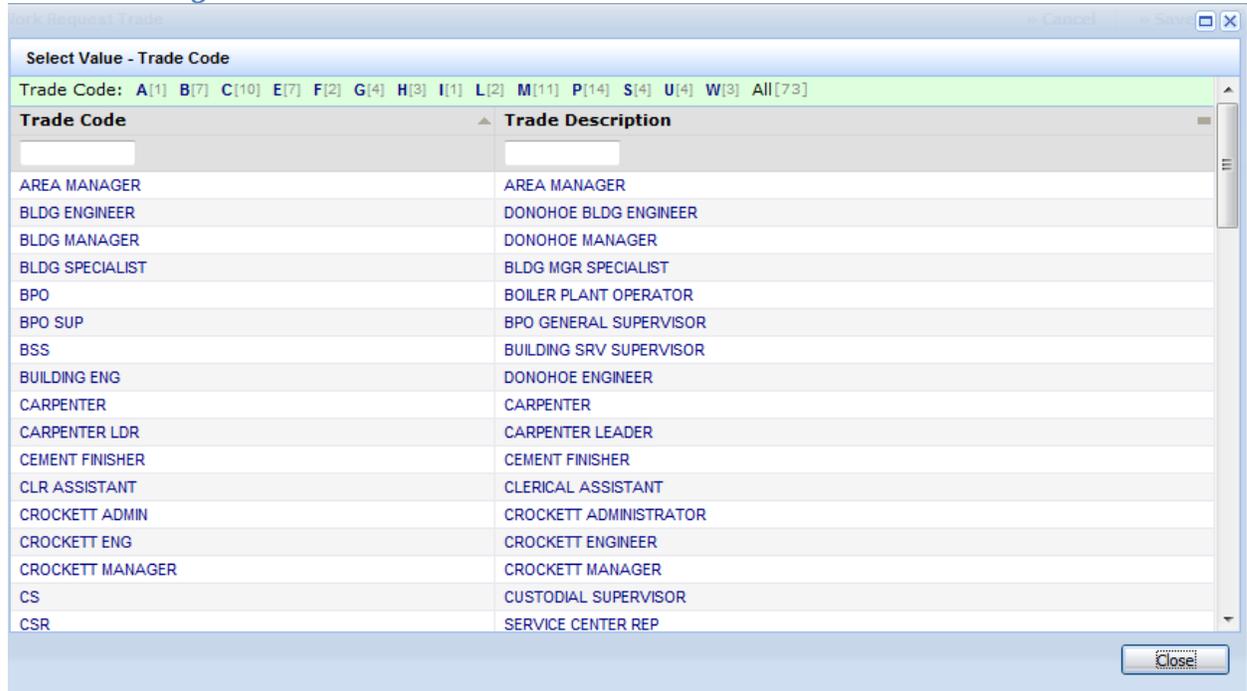
3. After clicking the Complete Estimation button, this will select the Schedule Tab.

    To assign a Craftsperson: on the Craftsperson Assignments panel, click "Assign Craftsperson" button.

Work Request Crafstperson Assignment button.

Click the elispis button to select the Craftsperson to be assigned to the Work Request.

Work type classifies the work requests.

Trade is the trade type selected on the Estimation. This will filter the Craftsperson dialog box if selected.
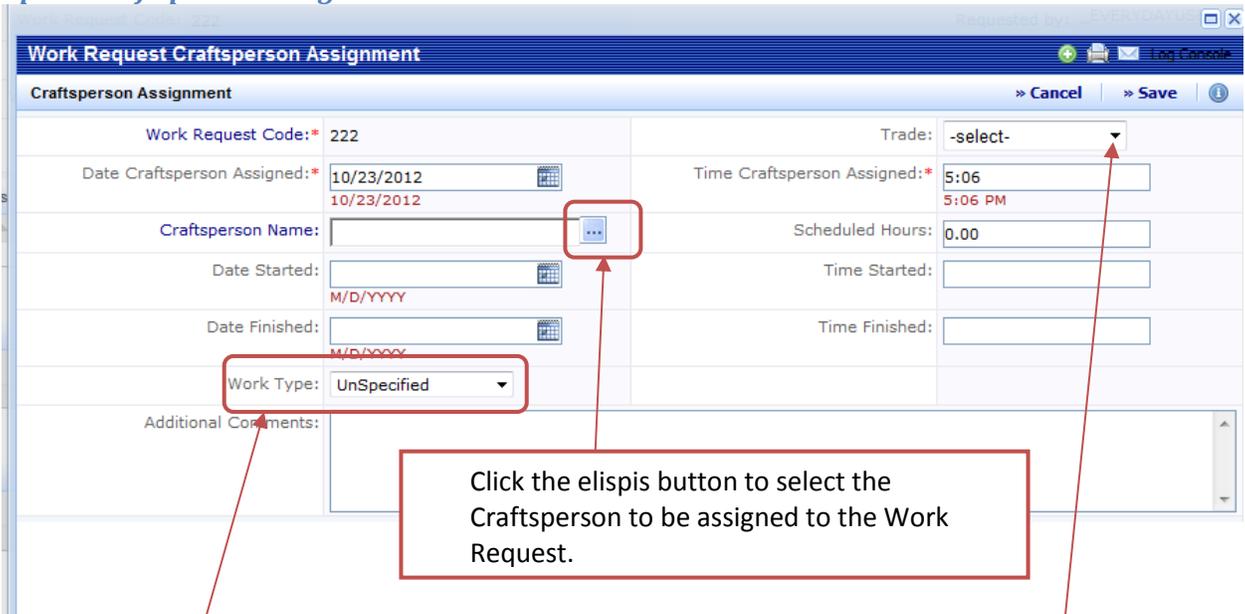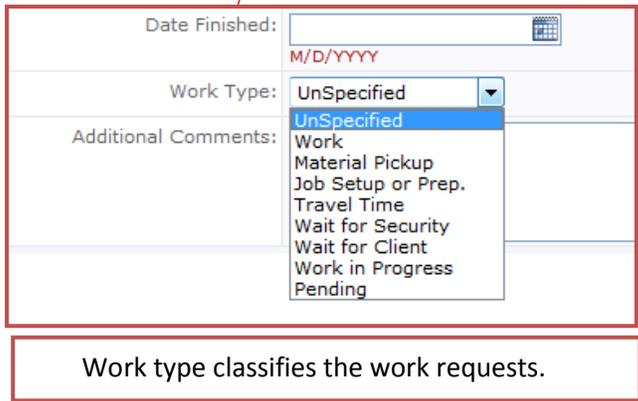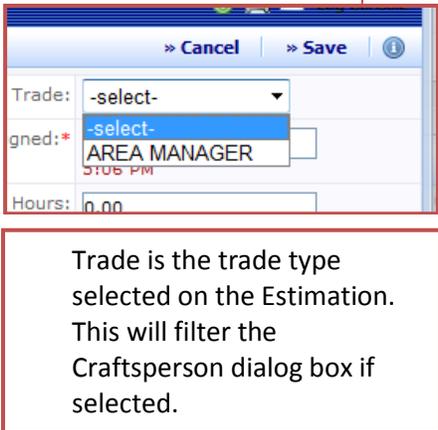
Craftsperson Assignment Dialog box

| Craftsperson Code	Craftsperson Name	Primary Trade	Work Team Code
TECH	Frank Technician	HVAC	DC TEAM
CONTRACTOR DGS	Contractor DGS	HVAC	DC TEAM
40132	Shaw, Bernard	FO MGR	DC TEAM
RISK MANAGER	Risk Manager	MULTI-TRADE	DC TEAM
CFI SUPER	Test Supervisor	MAINTENANCE	DC TEAM
AFM	AFM	MAINTENANCE	DC TEAM
CFI.CF1	Test Craftsperson	MAINTENANCE	DC TEAM
CSC	Customer Service Center	MECHANIC	DC TEAM

** When adding craftspeople, the default value for the hours estimated are the remaining hours to be scheduled for this trade. The start date and time are entered and the end date and time are calculated using the Service Window of the selected SLA.

NOTE This option is not required. Only use when NEEDED or NECESSARY

Assign Tools: on the Tool Assignments panel, click "Assign Tool"

» Assign Tool

Work Request Assignment
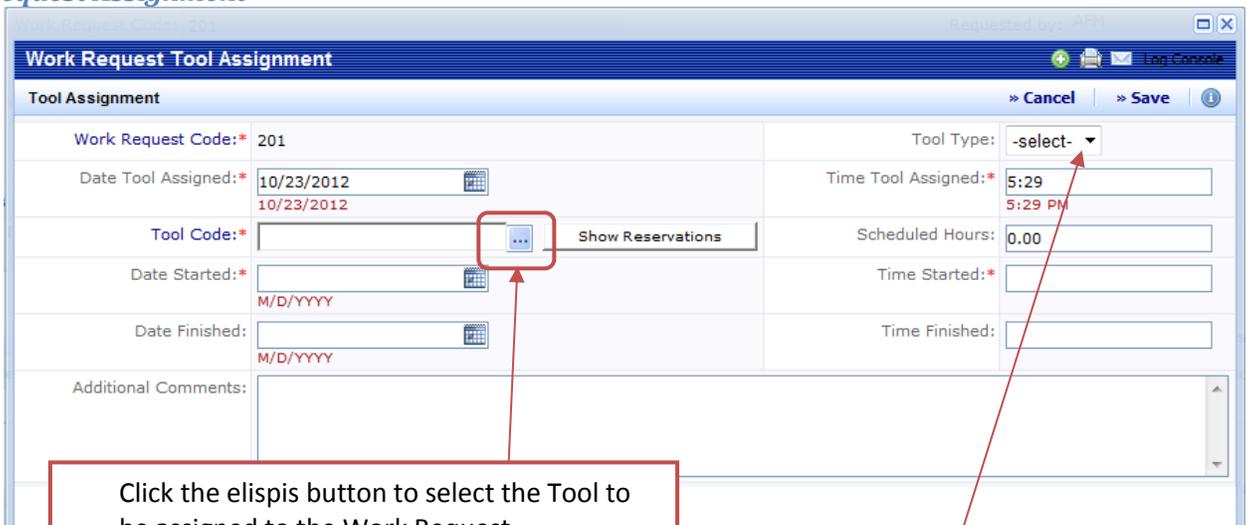
Click the elispis button to select the Tool to be assigned to the Work Request.

Selecting a value on this will filter the Tool assignment dialog box. The value on this dropdown list was based on the Estimation Step
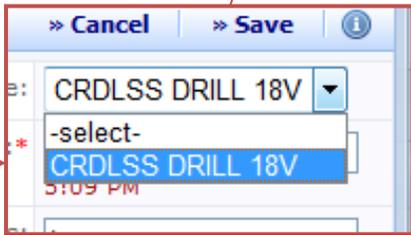
Tool Assignment Dialog box
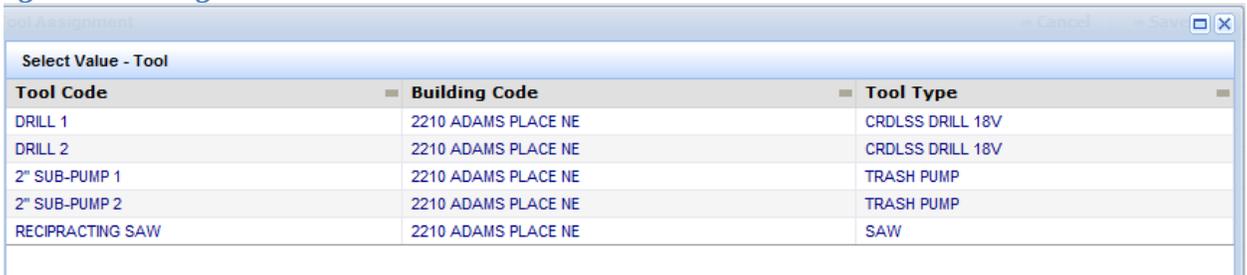
Tool Code	Building Code	Tool Type
DRILL 1	2210 ADAMS PLACE NE	CRDLSS DRILL 18V
DRILL 2	2210 ADAMS PLACE NE	CRDLSS DRILL 18V
2" SUB-PUMP 1	2210 ADAMS PLACE NE	TRASH PUMP
2" SUB-PUMP 2	2210 ADAMS PLACE NE	TRASH PUMP
RECIPRACTING SAW	2210 ADAMS PLACE NE	SAW

Then select the "Complete Scheduling" button.

» Complete Scheduling

This will end the schedule step, the work request is now ready to be work on and issued.

Issuing Work Orders

Once all work requests have been assigned to work orders, whether it was manually or automatically based on the parameters of the SLA, the work orders must be issued. Work Orders can be issued if estimates and schedules for all attached work requests are completed and approved according to the Service Level Agreement.

Select **Building Operations >On Demand Work > DGS Supervisor > Issue Work Orders** from the Web central navigator.
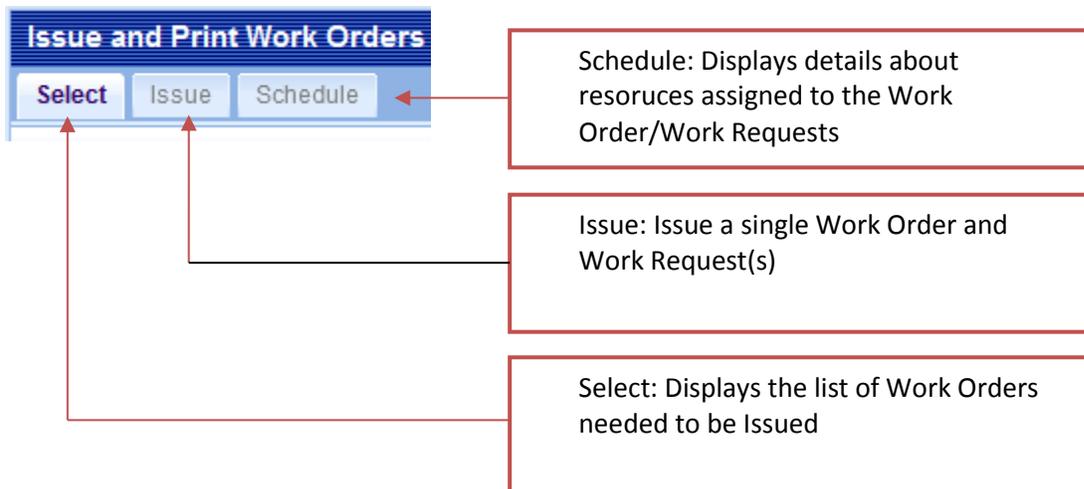

Schedule: Displays details about resoruces assigned to the Work Order/Work Requests

Issue: Issue a single Work Order and Work Request(s)

Select: Displays the list of Work Orders needed to be Issued

Filter Panel, can limit the number of records displayed on the grid.

Show button will filter the grid from issue panel work order list.

Clear button clears all values on the filter panel.

Select Tab

Click the select button to individually issue the work request. This will select the Issue tab.

Click the check box to select multiple Work Orders.

Click the Issue Selected button to issue all the Work Orders Selected.

Print Selected Button will print all Work Order Details for an individual or multiple Work Orders.

Issue Tab

The Supervisor will have the ability to

- Issue the individual Work Order and Work Request(s) associated to it
- Print The Work Order Details
- View the Schedule

Click the details button to display the Work Request Details.

Issue and Print Work Orders

Select | Issue | Schedule

Work Order   » Issue Work Order | » Print | » View Schedule

Work Order Code:	222
Date Work Order Created:	10/23/2012
	Date to Perform:
Supervisor:	Contact:
Account Code:	
Building Code:	441 4TH STREET NW
	Date Built: 07/7/2011
Primary Work Description:	Description of the problem

Work Requests   » Cancel Selected

		Work Request Code	Problem Type	Date Work Requested	Date to Perform	Work Request Status
☐	Details	222	ELECTRICAL	10/23/2012	10/23/2012	Assigned to Work Order

Issue Work Order will issue the Work Order and all the Work Request(s) associated to it

» Issue Work Order   » Print   » View Schedule

Cancel Selected will cancel an individual or multiple Work Requests. Cancel will Archive the request

» Cancel Selected

Print will print the Work Order Details and all the Work Request(s) associated to it

Work Request Details Dialog box

Work Request

Work Request   » Close | » Cancel Work Request

Work Request Code:	222	Date Work Requested:	10/23/2012
Date to Perform:	10/23/2012	Time to Perform Work:	
Problem Type:	ELECTRICAL	Work Request Status:	Assigned to Work Order
Work Description:	Description of the problem		

Work Location   » Show Floor Plan

Building Code:	441 4TH STREET NW	Room Code:	
Floor Code:	11	Problem Location:	

Estimation

|			
Estimated Cost of Labor:	0.00	Estimated Labor Hours:	0.00
Estimated Other Costs:	50.00		
Estimated Cost of Parts:	0.00		
Estimated Cost of Tools:	0.00		
Estimated Total Cost:	50.00		

Click the Cancel Work Order button cancel the selected Work Request.

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Manage Work Order/Requests

In this step, the Supervisor has the ability to

- add Work Requests to the same Work Order
- forward the Work Request to another Work Team

Select **Building Operations >On Demand Work > DGS Supervisor > Manage Work Orders/Requests** from the Web central navigator.

| Supervisor – Manage Work Orders: Displays list of Work Order before the issue step	Work Request Details: displays the details of the Selected Work Request
Work Order Details: display the details of the selected Work Order.	Work Request Documents: Displays the Documents attached to the request.

Supervisor – Manage Work Orders Tab:

Filter Panel, can limit the number of records displayed on the grid.
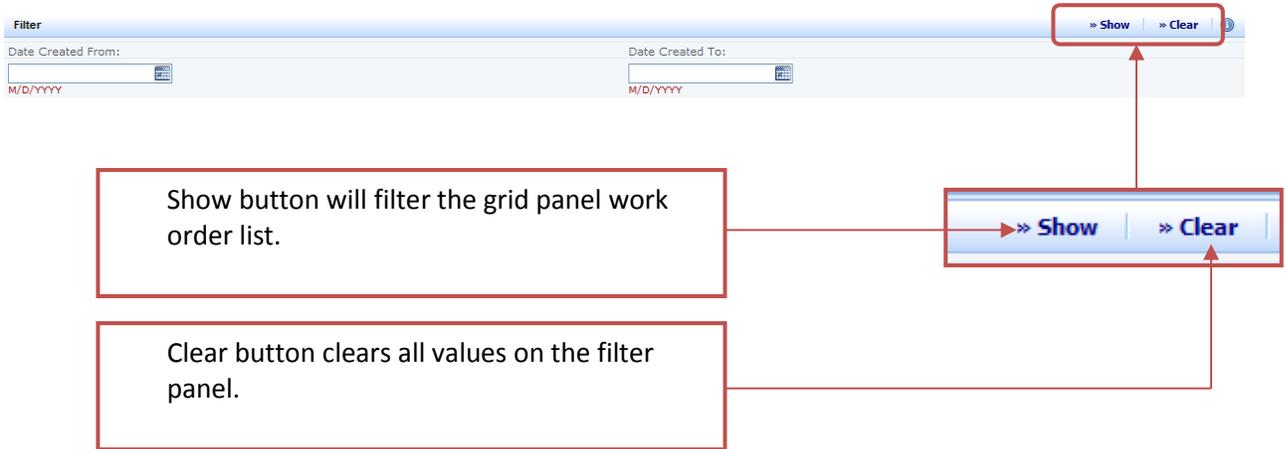
Filter	» Show	» Clear
Date Created From:		Date Created To:
M/D/YYYY		M/D/YYYY

Show button will filter the grid panel work order list.

» Show   » Clear

Clear button clears all values on the filter panel.
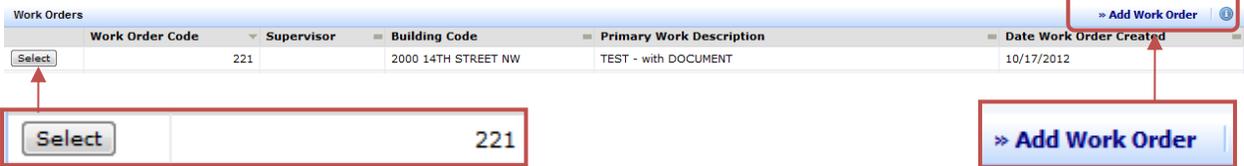
Work Order List

Work Orders					» Add Work Order
Work Order Code	Supervisor	Building Code	Primary Work Description	Date Work Order Created	
Select 221		2000 14TH STREET NW	TEST - with DOCUMENT	10/17/2012	

Select   221

» Add Work Order

Selects the Work Order and will display the Work Order Details Tab.

Creates a new Work Order and will display the Work Order Details Tab.

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Work Order Details Tab:

Save Work Order: Saves the Work Order
Forward: Forwards the Work Order and
Work Requests to another Work Team.

Add Work Request: adds a work request to
the wor order
Delete Seelected: Deletes the Work Request

the instructions below. Once a request has been forwarded to another WORK TEAM or SHOP it will no longer show up in your work and therefore is no longer your responsibility.

Forwarding Work Order/Requests

1. Select the forward button on the Work Order Details Tab

» Forward

2. Select a desired work team to forward to
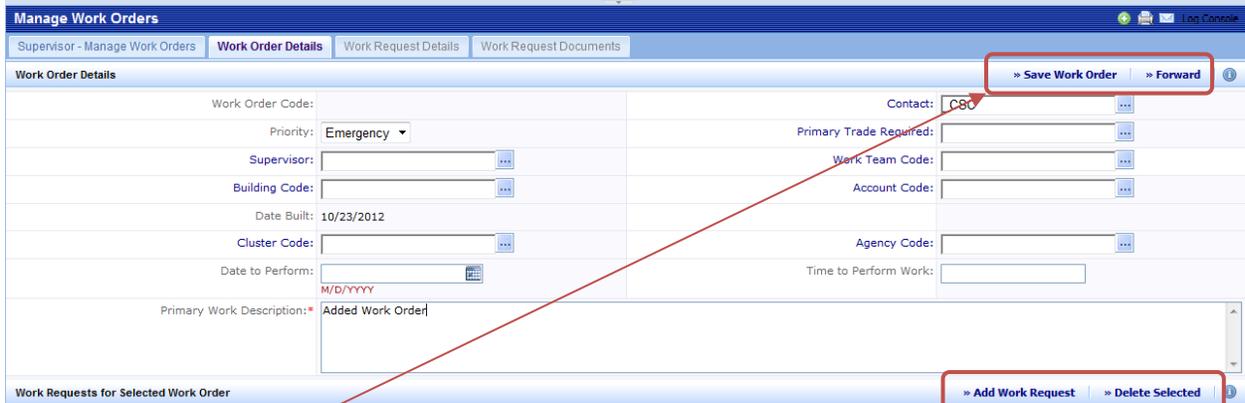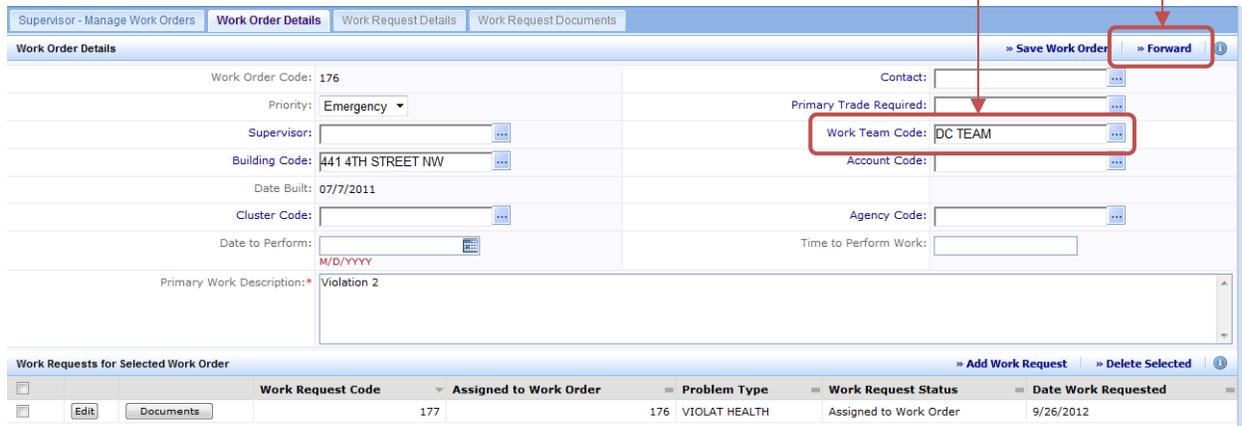
Supervisor - Manage Work Orders	Work Order Details	Work Request Details	Work Request Documents			
Work Order Details					» Save Work Order	» Forward

Work Order Code: 176	Contact:
Priority: Emergency ▼	Primary Trade Required:
Supervisor:	Work Team Code: DC TEAM
Building Code: 441 4TH STREET NW	Account Code:
Date Built: 07/7/2011	
Cluster Code:	Agency Code:
Date to Perform: M/D/YYYY	Time to Perform Work:
Primary Work Description:* Violation 2	

Work Requests for Selected Work Order   » Add Work Request   » Delete Selected

			Work Request Code	Assigned to Work Order	Problem Type	Work Request Status	Date Work Requested
☐	Edit	Documents	177	176	VIOLAT HEALTH	Assigned to Work Order	9/26/2012

Select Workteam Dialog box

Select Value - Work Team Code
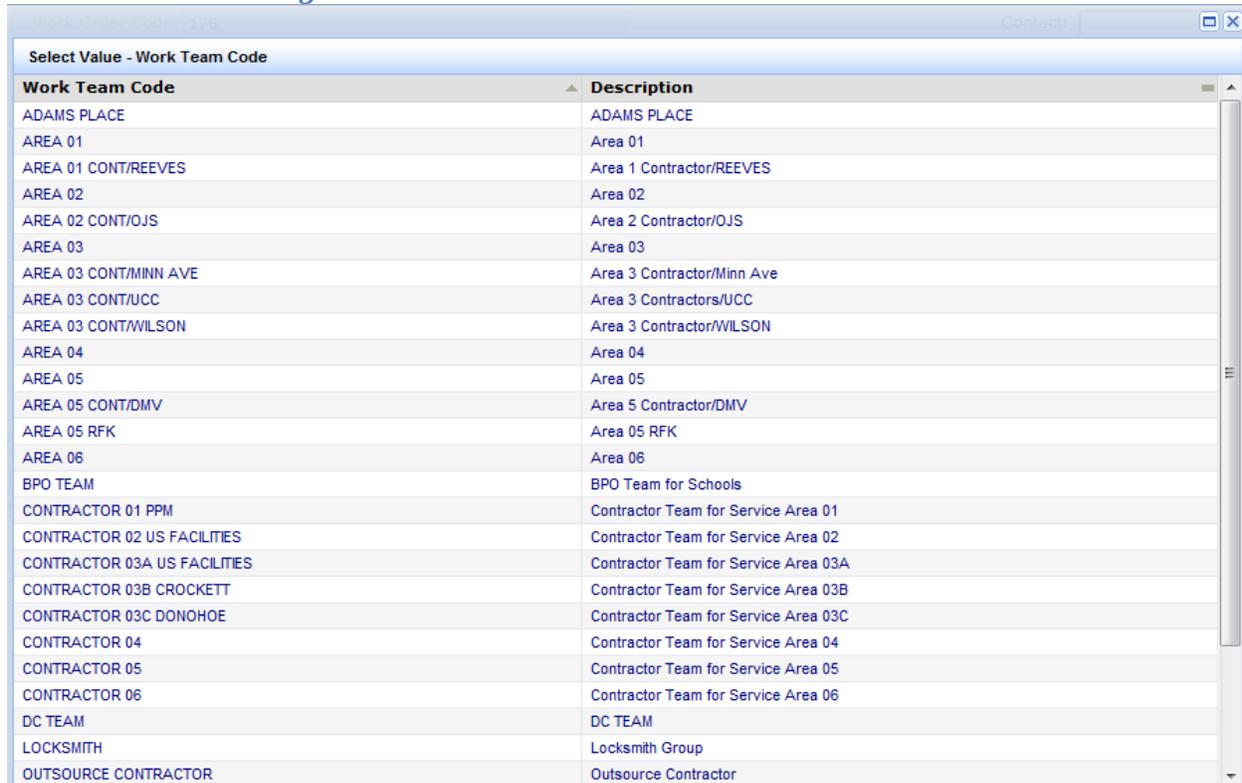
Work Team Code	Description
ADAMS PLACE	ADAMS PLACE
AREA 01	Area 01
AREA 01 CONT/REEVES	Area 1 Contractor/REEVES
AREA 02	Area 02
AREA 02 CONT/OJS	Area 2 Contractor/OJS
AREA 03	Area 03
AREA 03 CONT/MINN AVE	Area 3 Contractor/Minn Ave
AREA 03 CONT/UCC	Area 3 Contractors/UCC
AREA 03 CONT/WILSON	Area 3 Contractor/WILSON
AREA 04	Area 04
AREA 05	Area 05
AREA 05 CONT/DMV	Area 5 Contractor/DMV
AREA 05 RFK	Area 05 RFK
AREA 06	Area 06
BPO TEAM	BPO Team for Schools
CONTRACTOR 01 PPM	Contractor Team for Service Area 01
CONTRACTOR 02 US FACILITIES	Contractor Team for Service Area 02
CONTRACTOR 03A US FACILITIES	Contractor Team for Service Area 03A
CONTRACTOR 03B CROCKETT	Contractor Team for Service Area 03B
CONTRACTOR 03C DONOHOE	Contractor Team for Service Area 03C
CONTRACTOR 04	Contractor Team for Service Area 04
CONTRACTOR 05	Contractor Team for Service Area 05
CONTRACTOR 06	Contractor Team for Service Area 06
DC TEAM	DC TEAM
LOCKSMITH	Locksmith Group
OUTSOURCE CONTRACTOR	Outsource Contractor

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*Forwarding a work request requires you to change the workteam.*
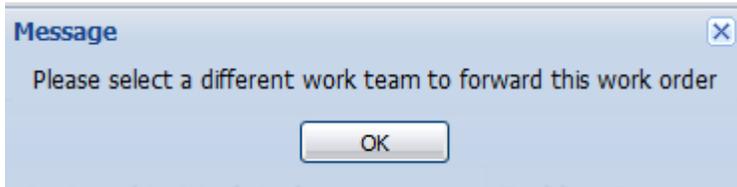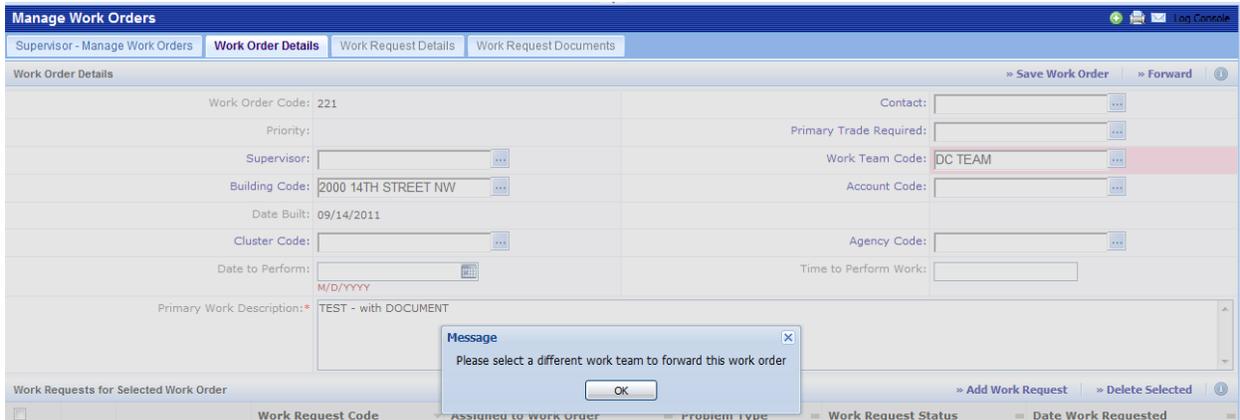
3. Once the appropriate work team was selected, a confirmation will be prompted. Upon clicking yes would forward the Work Order and Work Request(s) to the other work team. The Work Order will go back to the Estimate & Schedule Step for the new work team supervisor to edit or continue the estimation and assigning of resources for the request.
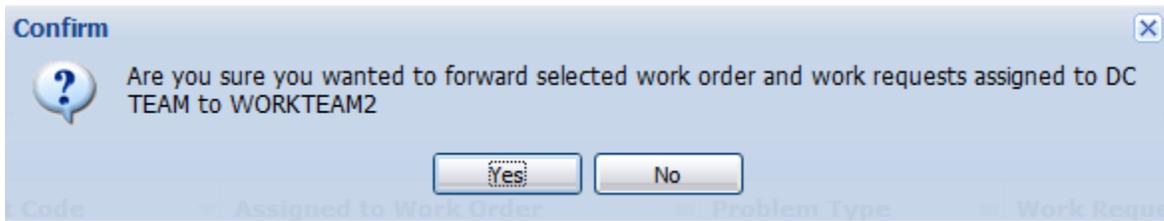
Completing and Closing Work Orders/Work Request

When craftspersons have completed their tasks and all invoices are completed, work orders can be closed out and archived. The supervisor may complete work requests if craftspeople don't have access to the application.

Select **Building Operations >On Demand Work > DGS Supervisor > Update Work Orders and Work Requests** from the Web central navigator.
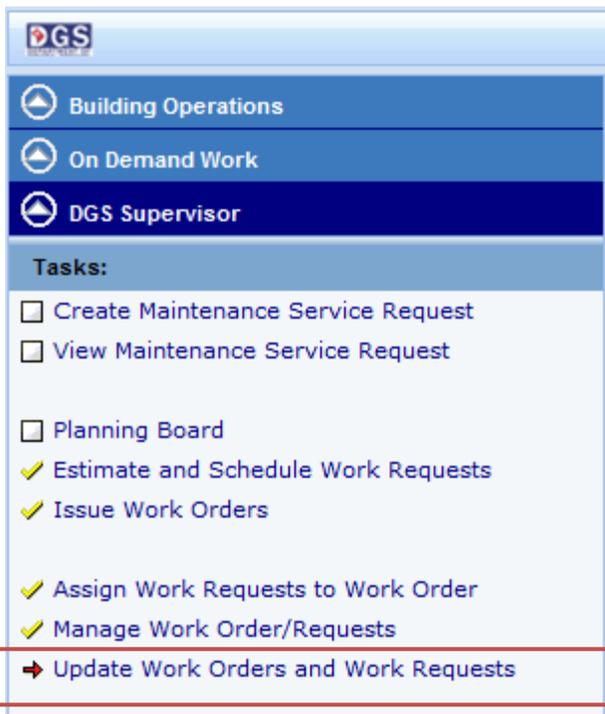
Select Tab:

1. Use the Select button next to one of the listed work orders to view a list of work requests assigned to the work order.
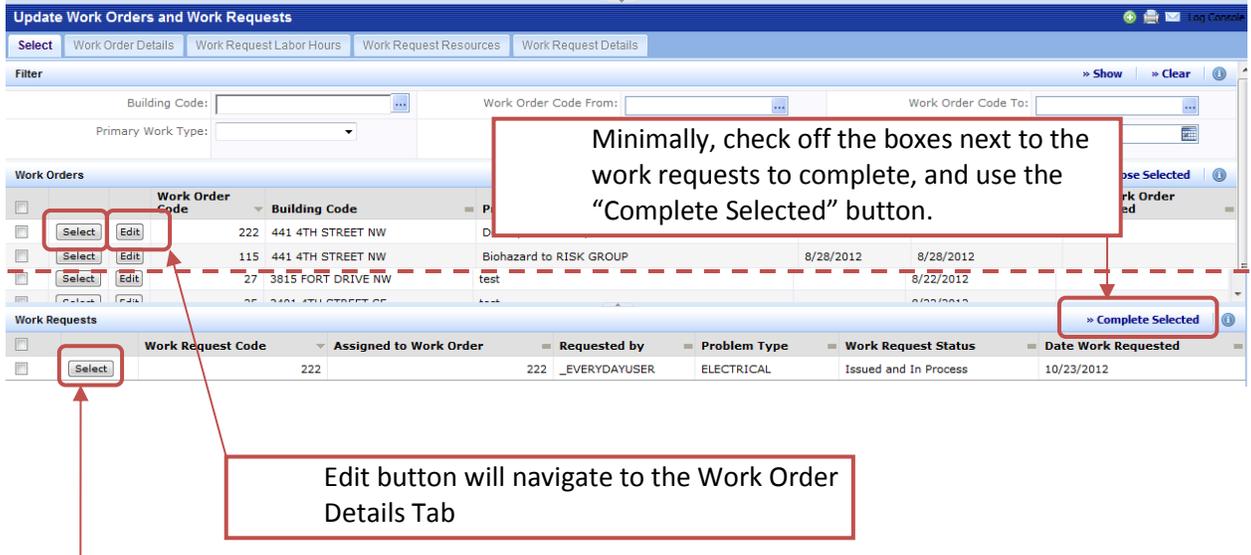
2. Use the Select button next to each work request to navigate to the Work Request Labor Hours tab. Update an existing craftsperson assignment by clicking the Edit button in front of the craftsperson to edit. A pop-up window will display detailed information on the selected craftsperson assignment. Update this information and save your changes or press cancel to close the pop up window without submitting changes. If no craftsperson assignments are listed, or another craftsperson should be assigned, click on the 'Add' button. Again the pop-up window will allow entry of the new craftsperson assignment

Work Order Details Tab:

Work Request Labor Hours Tab:

In this tab, the supervisor can edit the labor hours by clicking the edit button, or add another labor hours from the same craftsperson or another craftsperson.

3. Use the Next button to navigate to the Work Request Resources tab. A user can update resources like tools and parts for the work request

Work Request Resources Tab:

In this tab, the supervisor can edit the resources used in the request by clicking the edit button, or add more resources.

4. Use the Next button navigates to the Work Request Details tab, where the status of the work request can be updated or completed

Work Request Details Tab:

5. To return to the listing of work orders and work requests, press the "Select" tab.

Craftsperson/Technician

After Work Orders are issued the Craftsperson are now ready to work on the work requests assigned.

Select **Building Operations >On Demand Work > DGS Technician > Update Work Orders and Work Requests** from the Web central navigator.

Update Work Order and Work Requests
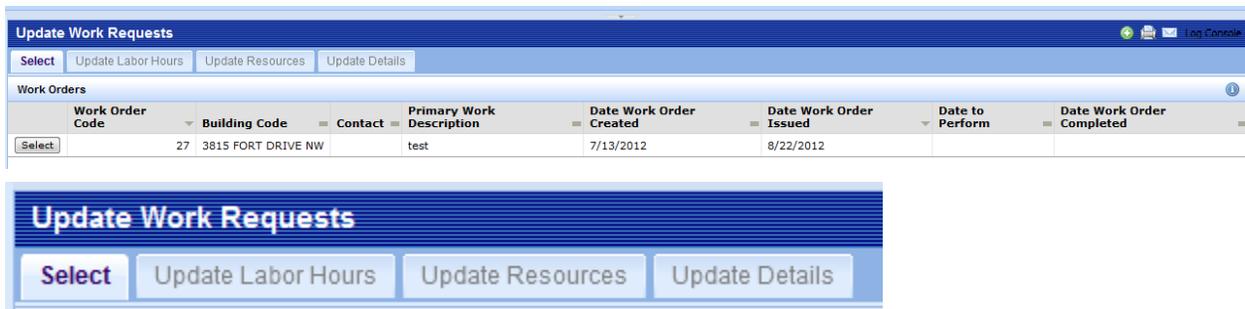
Select Tab:
1. Select the Work Order to display all work request assigned to the work order

> Minimally, check off the boxes next to the work requests to complete, and use the "Complete Selected" button.

2. Select button will navigate to the Update Labor Hours Tab

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Update Labor Hours Tab:

3. Select the edit button to update the labor hours on the selected work request.

4. Click the "Next" button to navigate to the Update Resources Tab

Craftsperson Labor Hours Dialog Box
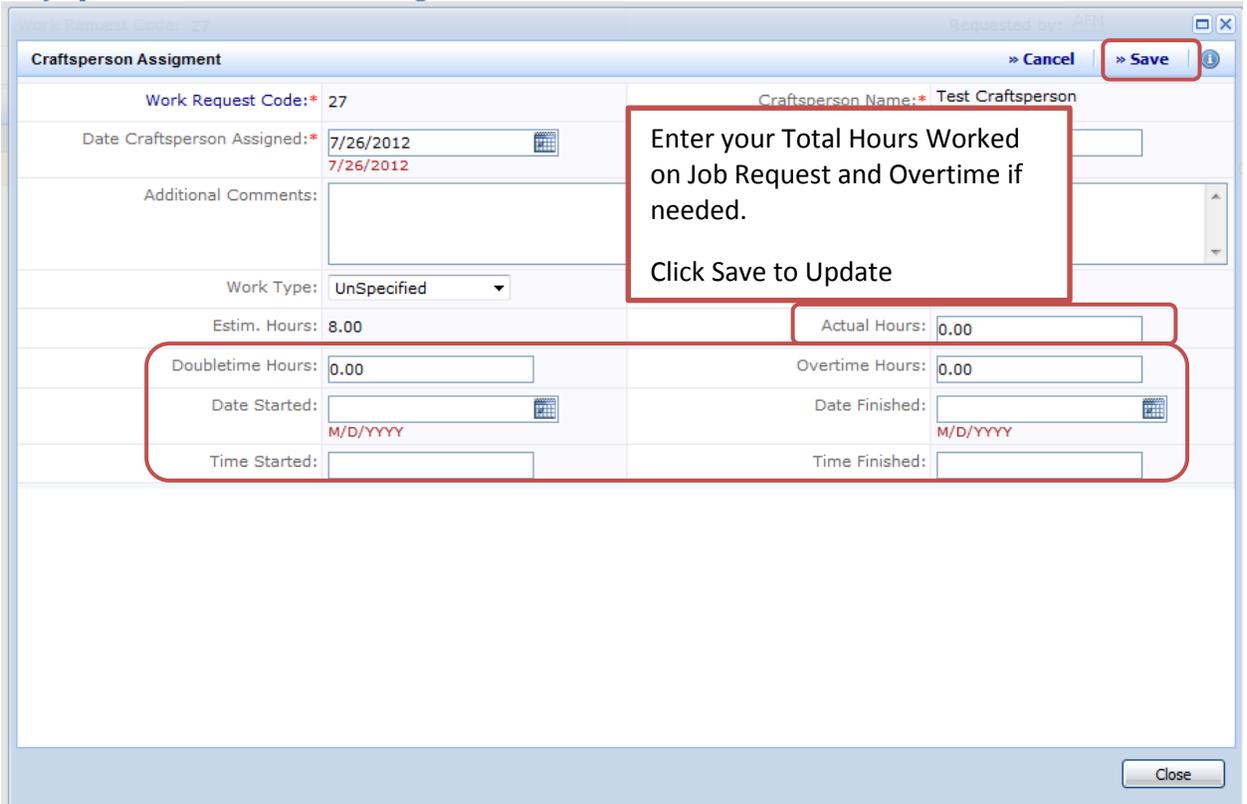
Update Resources Tab:

5. Click the **"Next"** button to navigate to the Update Details Tab
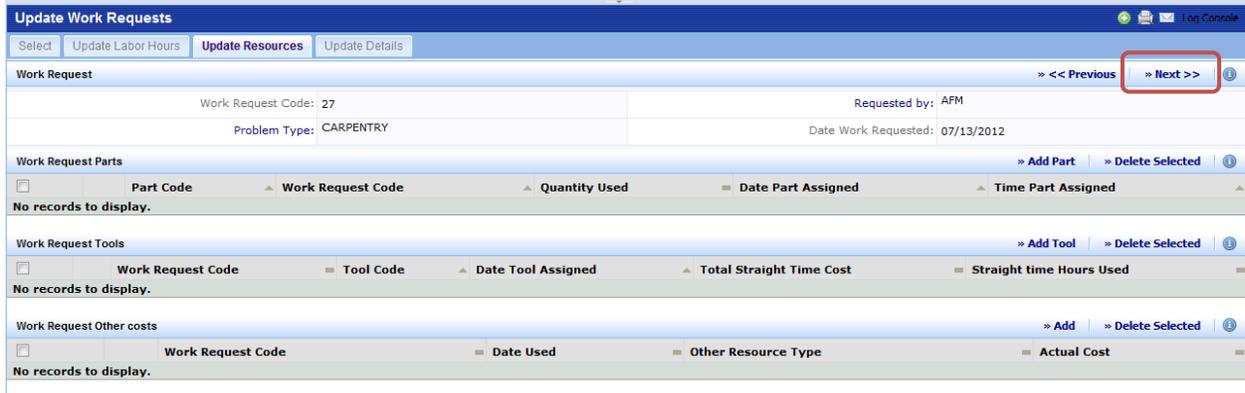
This tab allows the craftsperson to add or edit the resources used for the work request.

Update Details Tab:
1. Click **"Update Button"** to update the status of the Work Request

The Work Ticket is Completed you can Add Finances and Parts Used and then Close Out the Ticket