

HOME EFFICIENCY INCOME QUALIFIED INSTANT SAVERS ASSESMENT

Customer Information

Project ID: Customer Name: Install Date:

Installer Information **Safety Entrance Tests** (If CO fails follow BPI guidelines)

Company Name: Ambient CO reading: PPM
 Installer Name: Ambient LEL reading: %

Visually Identified Energy Savings Measures

BUILDING ENVELOPE INFORMATION		HVAC INFORMATION	
Foundation Types: (select all that apply)		Heating System Type (select below)	
<input type="checkbox"/> Slab on Grade	<input type="checkbox"/> Crawl Space	<input type="checkbox"/> Basement	None Present
Attic Insulation (R-Value):	None Present	<input type="checkbox"/> Heating System Not Operational	
Attic Insulation Square Feet:		Cooling System Type (select below)	
Insulation Determination:	2 x 4 x 16 visible rafters poor	None Present	
Additional Opportunities Available (select all that apply)		<input type="checkbox"/> Cooling System Not Operational	

More than 50% of the duct system is located in an unconditioned space

Assessment Status:

Visually Identified Potential Showstoppers (please have homeowner initial and discuss all that apply)
 (Note: If work can be performed without disturbing suspect asbestos containing material then the project may move forward.)

<input type="checkbox"/>	Knob & Tube Wiring	<input type="checkbox"/>	Vermiculite
<input type="checkbox"/>	Bulk Moisture	<input type="checkbox"/>	Mold-like substance
<input type="checkbox"/>	Non-Friable Asbestos	<input type="checkbox"/>	Friable Asbestos
<input type="checkbox"/>	Unvented Space Heater	<input type="checkbox"/>	Other: <input type="text"/>

General Notes

Field Technician Capture

Field techs use this app to track customer information and to get their signature on install items. The signature and the data is then sent in an email (next slide) to the company.

Thermostat Information

Type of thermostat present in the home: None Manual Programmable Smart Stat

Would you like a Smart Thermostat Installed? Yes No

Direct Install Measures

Installed Measure	QTY. INT.	QTY. EXT.	Installed Measure	QTY.	Measures not installed: (Check all that apply)
SMARTSTAT GAS	<input type="text"/>		SHOWERHEAD GAS	<input type="text"/>	<input type="checkbox"/> Not Qualified for gas
SMARTSTAT ELECTRIC	<input type="text"/>		SHOWERHEAD ELECTRIC	<input type="text"/>	<input type="checkbox"/> Not qualified for electric
APS TIER 1-7-PLUG LEFT	<input type="text"/>		KITCHEN AERATOR GAS	<input type="text"/>	<input type="checkbox"/> Already existing LED's
APS TIER 1-7-PLUG INST	<input type="text"/>		KITCHEN AERATOR ELECTRIC	<input type="text"/>	<input type="checkbox"/> Not compatible with fixtures
9 W LED	<input type="text"/>	<input type="text"/>	BATH AERATOR GAS	<input type="text"/>	<input type="checkbox"/> Customer Declined
4 W LED	<input type="text"/>	<input type="text"/>	BATH AERATOR ELECTRIC	<input type="text"/>	<input type="checkbox"/> Other <input type="text"/>

Print Owner Name:

Owner Signature:

Energy Advisor Signature:

Date:

Submit Form

HOME EFFICIENCY INCOME QUALIFIED INSTANT ASSESSMENT

Field Technician Capture Email

Project ID: 123456

Jacob Sobel

Install Date:
7/27/2021

Company: Inphlo
Installer: Jake

Ambient CO reading: 22 PPM
Ambient LEL reading: 12 %

Visually Identified Energy Savings Measures

Building Envelope Information

Foundation Types:

- Craw Space

Attic Insulation (R-value):

- None Present

Attic Insulation Square Feet:

- 212

HVAC Information

Heating System Type:

- 79% or Less Boiler

Cooling System Type:

- Window Units

Insulation Determination:

- 2 x 4 x 16 visible rafters poor

Additional Opportunities available:

- Rim Joist Insulation
- DWH Gas, DWH Electric
- Air Sealing

Visually Identified Potential Showstoppers

*Note:
If work can be performed without disturbing suspect asbestos containing material then the project may move forward.*

- Knob & Tube Wiring: 
- Unvented Space Heater: 

Thermostat Information

Type of thermostat present in the home:

- None

Would like a thermostat installed:

- Yes

Assessment Status:

- Items need addressed

Direct Install Measures

Installed Measure	QTY. INT.	QTY. EXT.	Installed Measure	QTY.
Smart Gas	2	-	Showerhead Gas:	
Smartstat Electric:	3	-	Showerhead Electric:	2
APS Tier 1-7-Plug Left:	2	-	Kitchen Aerator Gas:	
APS Tier 1-7-Plug Inst:	0	-	Kitchen Aerator Electric:	
9 W LED:	0	1	Bath Aerator Gas:	1
4 W LED:	1	1	Bath Aerator Electric:	
4.5 W LED:			1/2 Pipe Insulation Gas:	
8 W LED:			1/2 Pipe Insulation Electric:	
13 W LED:			3/4 Pipe Insulation Gas:	
15 W LED:	10	1	3/4 Pipe Insulation Electric:	
17 W LED:				-


Measures Not Installed:

Customer Acknowledgement:

Print Owner Name: Jacob Sobel

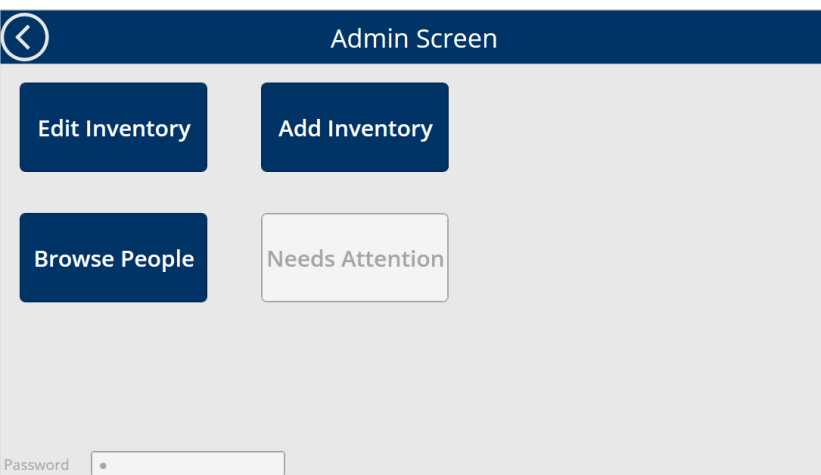
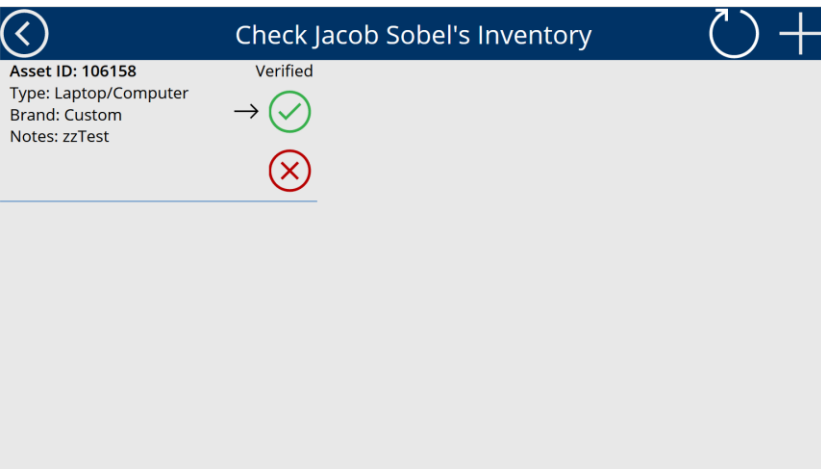
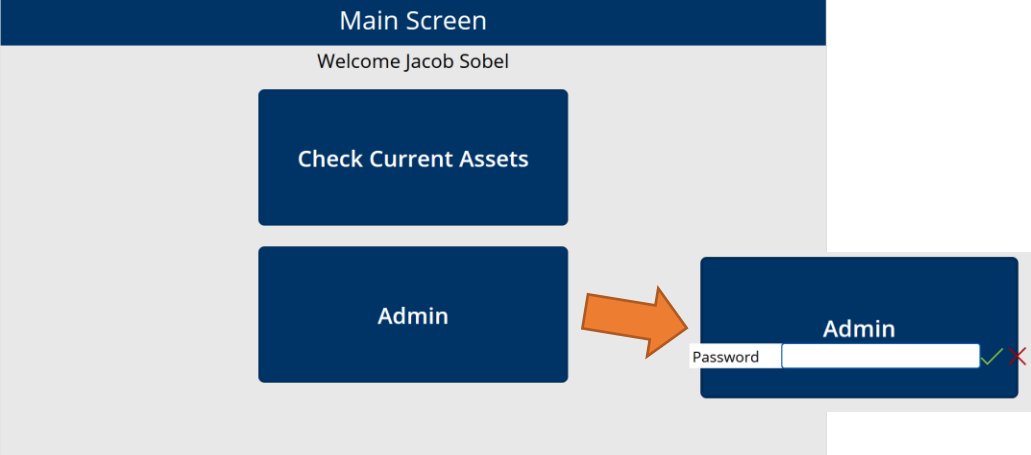
Date: 7/27/2021

Owner Signature:



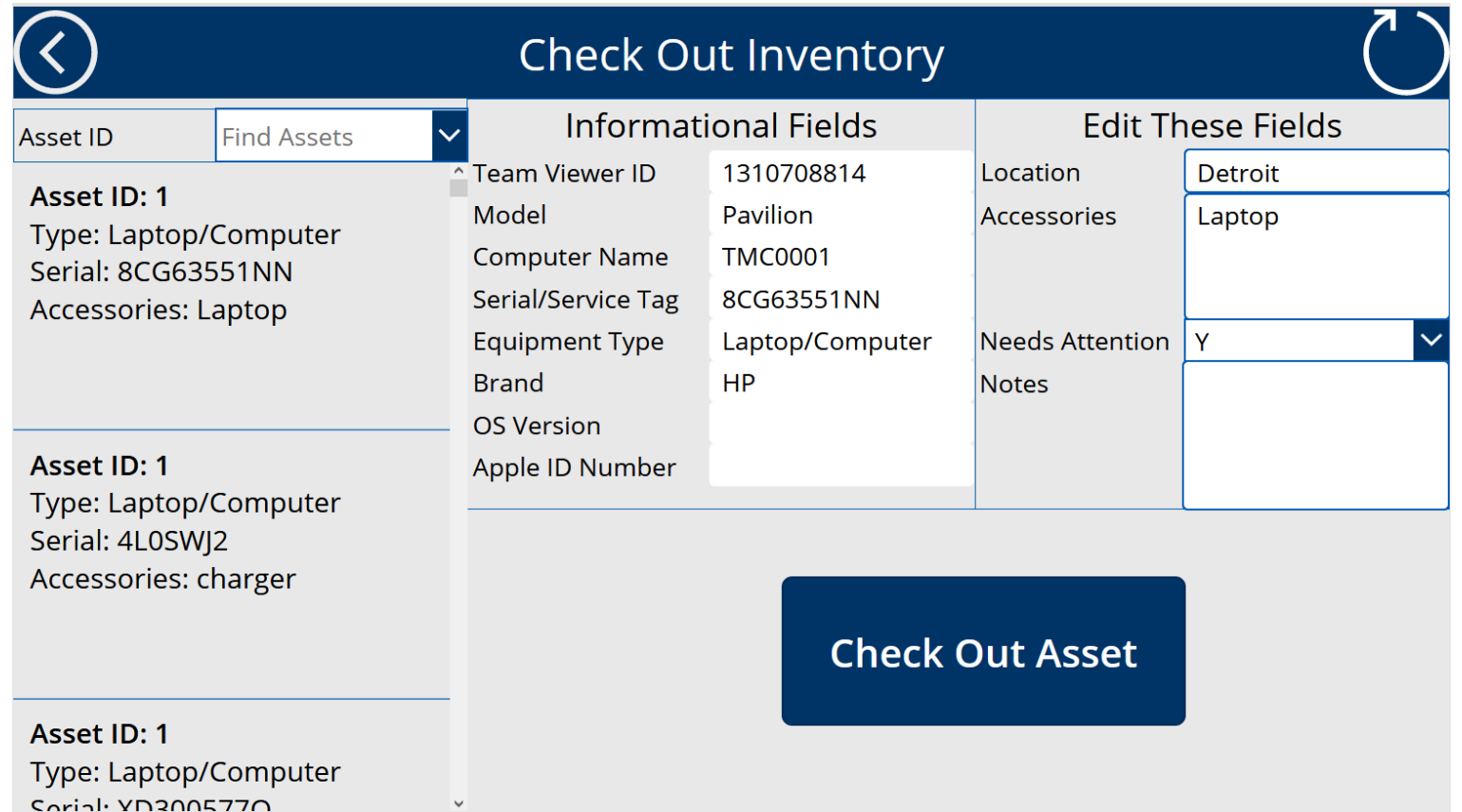
Energy Advisor Signature:





Company IT Asset Tracker

A company uses this app to track IT assets across their network. Admins are the only ones who can add or edit new assets. All users are allowed to check in and verify that they have certain assets. IT will also use this to recover assets from ex-employees.



Asset Form

Item Description

Location

Office

Category

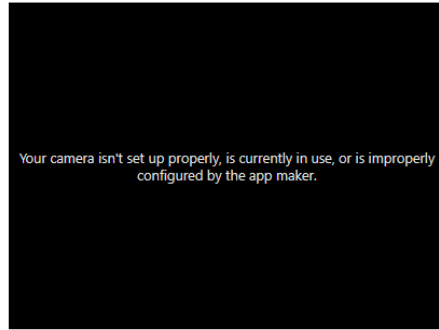
Machine

Serial

Condition

New

Notes



Submit

Industrial Asset Management App
This is the start of an asset management app. I will eventually be able to combine this one and the maintenance one to keep track of issues for each asset.

+ Add section

Assets



Name: Keyboard
Location:
Asset ID: 22
Notes: Desktop



Name: Keyboard

Location:

Asset ID: 22

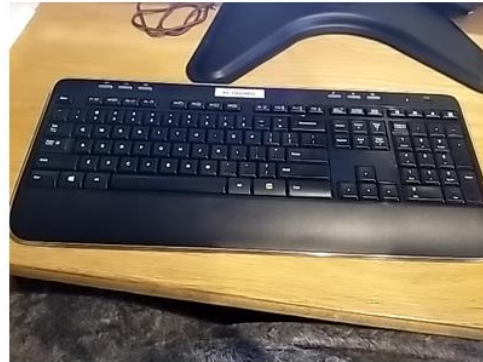
Notes: Desktop



Name: Coffee Mug
Location: Office
Asset ID: 23
Notes: Sunday mug



Name: Computer
Location:
Asset ID: 26
Notes: Desktop computer



Assets

Name: Category:

Location: Condition:

Asset ID: 22 Serial Number:

Purchase Date:

Notes:

Project Time Allocation App

This app is used by a research company that has to track how much time they dedicate to each project for grants. There are a lot of UX features that will not allow a user to submit an incomplete entry. There is also a password protected screen where admins can change and add projects.

Project Effort Reporting

Submitting For Month: Sep

Project Time Allocated

Comments

Project: Project 10 %
Comments: Test 1

Project: Project 19 %
Comments: Test 2

Total Time Allocated 100%

Review for Sep

Project 10
Time Allocated: 45 %
Comments: Test 1

Project 19
Time Allocated: 55 %
Comments: Test 2

Admin

- New Project 54
- Non-project Related Work
- Project 10
- Project 11
- Project 12
- Project 13
- Project 14
- Project 15
- Project 16
- Project 17
- Project 18
- Project 19
- Project 2

Project

Password

New Project

Project

Employee Evaluation App

Welcome Jacob Sobel

Inphlo Corporate Values

- Relentless pursuit of quality
- Straightforward and respectful approach
- Passion to help customers (and others) succeed
- Focused and selective expertise
- Long-term view

Company Goals

- Goal 1
- Goal 2
- Goal 3
- Goal 4
- Goal 5

Supervisor

Employee Review

Employee Quarterly Review

This app is was made for a company that wanted to centralize their employee review process. Managers will be able to review their employee's performance and set new goals. Employees and managers will also be able to see historical reviews.



Select Employee to Review

Name: Darkside Art



Name: YPN Muscatine



Choose Review Time Period

Q1



Welcome Jacob Sobel

Q1 8/4/2021

Employee Comments: Test 11

Manager Comments: Test 11

Q1 8/29/2021

Meeting Expectations

Employee Comments: Test 20

Manager Comments: Test 1

Individual Review for Jacob Sobel

Individual Goals	Personal Development Goals
Goal: Increase sales by 23% Measure: Sales of NE region increase by 23% Info: On track to hit 27% <div style="text-align: right; margin-top: 5px;">Edit</div>	Goal: Get smarter Measure: IQ test Info: Ehh <div style="text-align: right; margin-top: 5px;">Edit</div>
Goal: Decrease sales by 10% Measure: Sales number Info: Goal is going bad <div style="text-align: right; margin-top: 5px;">Edit</div>	Target: 8/11/2021 Status: Obstacles <div style="text-align: right; margin-top: 5px;">Edit</div>
Goal: 2 Measure: 2 Info: 2 <div style="text-align: right; margin-top: 5px;">Edit</div>	Target: 8/15/2021 Status: On Target <div style="text-align: right; margin-top: 5px;">Edit</div>
Employee Comments	
Test 11	
Supervisor/Manager Comments	
Test 11	
Overall Rating	
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Below Expectations</div>	
Acknowledgement of Employee and Manager/Supervisor	
Employee <input style="width: 100%;" type="text" value="Type Full Name"/>	Manager/Supervisor <input style="width: 100%;" type="text" value="Type Full Name"/>

Employee Quarterly Review Continued

Add a Personal Development Goal

Goal Description	<input style="width: 100%;" type="text" value="Text input"/>
Measurement	<input style="width: 100%;" type="text" value="Text input"/>
Goal Progress Information	<input style="width: 100%;" type="text" value="Text input"/>
Status	<input type="text" value="Not Started"/> ▼
Target Completion Date	<input type="text" value="10/11/2021"/> 📅

Add Goal

Submit New Request

Manager Review

Perform Maintenance

Admin

Maintenance Request App

INPHL

Perform Maintenance

Select Job

Your Info

Need 1029 bearing changed

Asset Number: 728491
Status: Started



Leaking fluid

Asset Number: 943747
Status: Open



CMMS App

This is one of my apps that is still in development. It will allow users to submit maintenance requests, managers to assign work, and allow maintenance members to track their work. This is one of my most recent ones where I spent more time on the looks instead of just functionality. all in the app.

Search Assets

Fill Out Form

Search Asset Number

Asset Description

Previous/Current Requests

Need 1029 bearing changed
Date: 5/9/2020 2:55 PM
Asset Number: 728491
Request Status: Started

Leaking fluid
Date: 5/9/2020 2:55 PM
Asset Number: 943747
Request Status: Open

Flux Capacitor is not fluxing
Date: 5/10/2020 10:23 PM
Asset Number: 728491
Request Status: Pending

Add New



REBA Assesment

1

Twisting No
Side Bending No

2

Run

Table A Posture Score
Shock or Rapid Force Load (lbs) No

Score A

1

Shoulder Raised No

REBA Assesment

Arm supported or leaning No

1

Bent/Twisted No

Run

Table B Posture Score
Coupling Score
Good Fair Poor Unacceptable

Score B 0

1 or more body parts are held for longer than 1 min (static) No

Repeated small range actions (more than 4x per minue) No

Action causes rapid large range changes in postures or unstable base No

Score C
Final Score 0

Low Risk. Change may be needed.

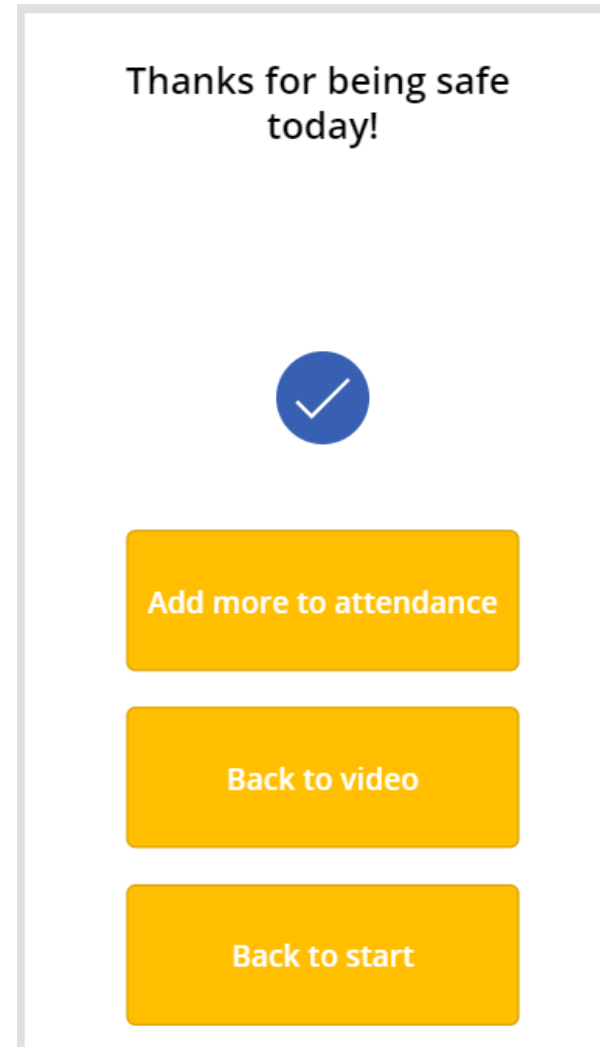
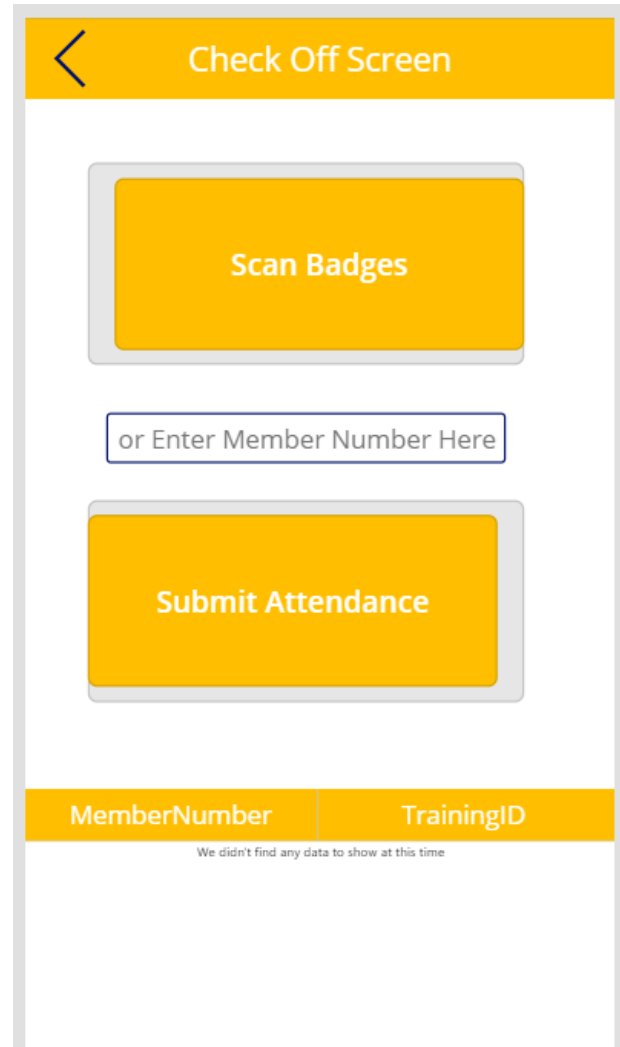
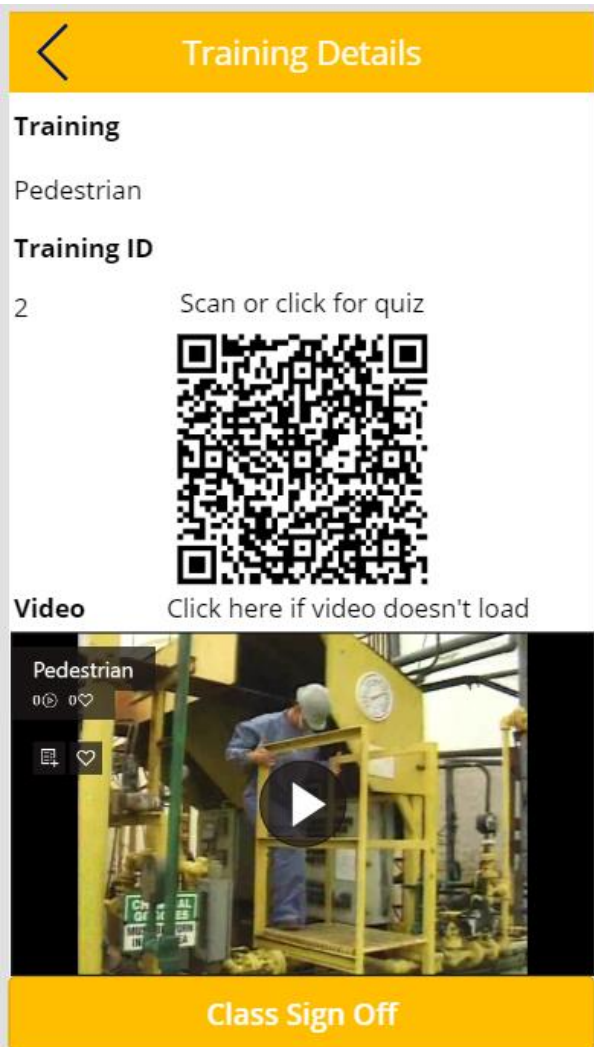
Submit

REBA Analysis App

The REBA is a popular tool to measure ergonomics for a workstation. This app allows the user to track risk for each station and fill out the form from a device.

OSHA Training App

This is a work app that is used to do and track safety training for 1,000s of members. A member can take a quiz and get direct feedback through MS Forms. All the data rolls up into Power BI so managers can see training.



HR App

An HR app that is used to track training hours and other metrics. We can pull turnover, basic employee numbers, and view this in Power BI

Employees

Search by Last Name

- Employee 1 Temp
- Employee 10 Full
- Employee 100 Temp
- Employee 101 Temp
- Employee 102 Temp
- Employee 103 Temp
- Employee 104 Temp
- Employee 105 Temp
- Employee 11 Full
- Employee 12

New Employee

First Name: First Name

Last Name: Last Name

Hire Date: 3/10/2021

Status: [Dropdown]

Birthday: 12/31/2001

Type: Temp

Shift: 1

Manager: 34, Employee

Manager?: No

Add Employee

End Date Employee

First Name: Employee

Last Name: 1

Reason: [Dropdown]

Reason Detail: [Dropdown]

Notes: Notes about end date

Update Information

Log New Training

Employee: 1, Employee

Training: Lean 101

Training Date: 3/10/2021

Expiration Date: 3/10/2022

Your camera isn't set up properly, is currently in use, or is improperly configured by the app maker.

Submit

Select Location



Name: Sobel, Jacob J **ID:** 4769
Visual Management / Visuales / Visuelles >
Dept: Rci
Manager: 
Date Submitted: 7/8/2020

Problem: No 8D form on the BPI SharePoint Site

Idea: Put a link on the BPI site for 8D that links to the Quality SharePoint site so they can still manage it.

Comments: / This needs to be done by Friday / Do this /




Assigned To:

Company Suggestion Box

This is a work app that pulls in ideas from members on the floor. A member submits an idea through a MS Form, it then goes to manager for approval, then if incomplete comes to this app. This app allows managers to assign work to members and gives visibility to the whole process.



ID Number 4769
Member Name Sobel, Jacob J
Category Visual Management / visuales / Visuelles
Department Rci
Manager
Date Submitted 7/8/2020
Problem No 8D form on the BPI SharePoint Site

Status 
Assigned To Member Name
Change Assigned To  

Comments
/ This needs to be done by Friday / Do this /

Idea Put a link on the BPI site for 8D that links to the Quality SharePoint site so they can still manage it.

Add New Comments Here

Audit App

This is a work app that is used to do audits on manufacturing processes. The auditor can take pictures, add comments, and rate the process. Saving an audit will email the zone owner with things to fix process.

Look-See Audits Standard Work Link

User Sobel, Jacob
Email So

A U D I T S

- Sobel, Jacob (Allsteel)**
Status: Started
Due Date: 4/20/2020
Audit Type: LPA
Audit Name: Test LPA
Plant: CMP
Location: Fabric Aisle
Audit Zone: 89
ID: 18
- Sobel, Jacob (Allsteel)**
Status: Not Started
Due Date: 4/20/2020
Audit Type: LPA
Audit Name: Test LPA
Plant: GSO
Location: Education Line
Audit Zone: 22
ID: 19

M I T I G A T I O N S

Admin

Audit Screen

Test LPA Question 1
Is member wearing PPE?

★ ★ ★ ★ ★

Q1 Comments

Test LPA Question 2
Is there 10 units of WIP?

★ ★ ★ ★ ★

Q2 Comments




Admin Central


- Create or Edit an Audit** Started.
- Create or Edit a Location** Started.
- Assign an Audit** Partially Incomplete.
- Reassign an Audit** Not Started.
- Schedule an Audit** Not Started.

+ Add section

Manufacturing Delivery App


This is a work app that is used to order parts. A member delivering parts can create a shopping cart. This app allows us to see average time to pick and deliver. It also will allow us to eventually predict what parts are needed.

Undelivered Parts   

 Search location

Part Number: Qty Requested: 63 Order Location: 3/10/2020 3:01 PM	<input type="checkbox"/>
Part Number: 123000 Qty Requested: 2 Order Location: 2BIN155 1/28/2020 2:12 PM	<input type="checkbox"/>
Part Number: 123000 Qty Requested: 5 Order Location: 2BIN155 3/9/2020 10:36 AM	<input type="checkbox"/>
Part Number: 123000 Qty Requested: 6 Order Location: 2BIN155 1/28/2020 6:00 PM	<input type="checkbox"/>
Part Number: 123000 Qty Requested: 5 Order Location: LINE98 1/30/2020 10:06 AM	<input type="checkbox"/>
Part Number: 123000	

View Cart **Order Part**

 **Order Parts Here**


Scan Part Number

Part Number

Scan Order Location

Order Location

Qty Requested

UOM 

Scan Badge

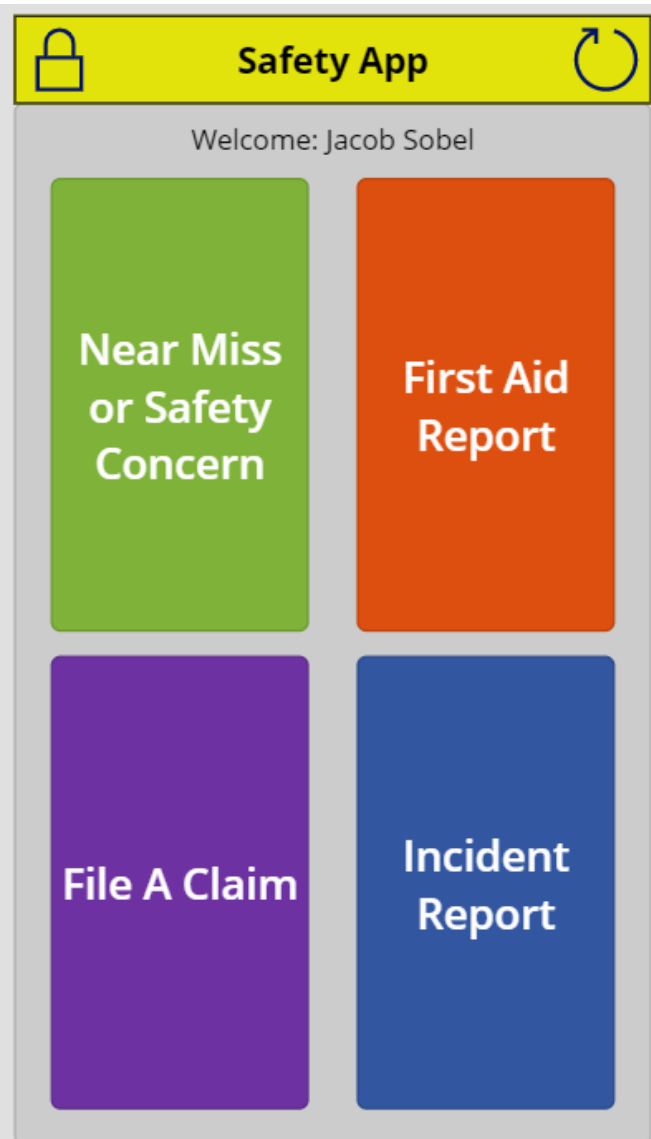
Requester

Expedite for COT? No

Cancel **Send Order**

Safety Tracking App

This is a work app that is used to report safety incidents and then do an investigation.



The screenshot shows the "First Aid Report" form. The orange header bar includes a back arrow, the title "First Aid Report", and a save icon. The form fields are: "Member Number" (text input with "Type Here" placeholder), "Body Part" (dropdown menu), "Injury Type" (dropdown menu), "Plant" (text input), "Factory" (dropdown menu), and "Dept" (text input). At the bottom left, there is a "+ Add section" button.

The screenshot shows the "Incident Report" list. The blue header bar includes a back arrow, the title "Incident Report", and a save icon. The list contains three entries, each with a right-pointing chevron icon:

- Assigned To: Sobel, Jacob J**
Created Date: 5/29/2020 12:45 PM
Incident ID: 4
Location: 200
Department: 1
- Assigned To:**
Created Date: 6/2/2020 11:39 AM
Incident ID: 5
Location: 200
Department: 1
- Assigned To: N**
Created Date: 6/2/2020 11:41 AM
Incident ID: 6
Location: 200
Department: 1

This self-check Covid-19 Health screen form must be completed prior to reporting to work.

This must be submitted at least 1 hour prior to the start of your shift.

Company X has ZERO TOLERANCE for deviation from the health screen process. Known failure to follow this process will result in disciplinary action up to and including termination of employment.

Next

Health Screening Form

Team Member Name	Jacob Sobel
Date	7/22/2020
Sore Throat	<input type="radio"/> Yes <input type="radio"/> No
Fever or Chills	<input type="radio"/> Yes <input type="radio"/> No
Cough	<input type="radio"/> Yes <input type="radio"/> No
Shortness of Breath	<input type="radio"/> Yes <input type="radio"/> No
Fatigue	<input type="radio"/> Yes <input type="radio"/> No
Diarrhea	<input type="radio"/> Yes <input type="radio"/> No
Headache	<input type="radio"/> Yes <input type="radio"/> No
Muscle or Body Aches	<input type="radio"/> Yes <input type="radio"/> No
New Loss of Taste and smell	<input type="radio"/> Yes <input type="radio"/> No
Nausea or Vomiting	<input type="radio"/> Yes <input type="radio"/> No
Congestion or Runny Nose	<input type="radio"/> Yes <input type="radio"/> No
Current Temp	<input type="text" value="Enter Here"/>
In the past 24 hours have you had close contact with an individual diagnosed with Covid-19?	<input type="radio"/> Yes <input type="radio"/> No

Next

Return to Work App

This is one of my apps that I developed to help a client with their return-to-work program.

if you have answered "YES" to any of the symptoms or questions on the form, DO NOT go into work. Self Isolate at home and contact your primary care physician's office and a member of the Human Resource team immediately for next steps.

Isolate at home for a minimum of 7 days from the time the symptoms first appeared.

You must also have 3 days without fevers and improvement in respiratory symptoms prior to going to work.

By submitting this form, you certify that the information submitted is true and I understand that falsification of information on this form will result in disciplinary action up to and including termination of employment.

Go Back

Submit and Restart

Employee X is cleared for work



Jacob Sobel
To Jacob Sobel

This message was sent with High importance.

Name: Jacob Sobel
Date: 7/21/2020
Sore Throat: No
Fever or Chills: No
Cough: No
Shortness of Breath: No
Fatigue: No
Diarrhea: No
Headache: No
Muscle or Body Aches: No
New Loss of Taste and Smell: No
Nausea or Vomiting: No
Congestion or Runny Nose: No
Current Temp: 99
Close Contact: No

Employee X has a positive response



Jacob Sobel
To Jacob Sobel

This message was sent with High importance.

Name: Jacob Sobel
Date: 7/21/2020
Sore Throat: Yes
Fever or Chills: No
Cough: No
Shortness of Breath: No
Fatigue: No
Diarrhea: Yes
Headache: No
Muscle or Body Aches: No
New Loss of Taste and Smell: Yes
Nausea or Vomiting: No
Congestion or Runny Nose: No
Current Temp: 105
Close Contact: No

Event List
↻ ↑ +
← Event Registration
✎ +

Bridgeside Closest to the Pin Bridgeside 2/27/2020	>	Event Bridgeside Closest to the Pin
March Madness Buffalo Wild Wings 3/19/2020	>	Search Name Sobel, Jacob
Membership Drive Geneva Country Club 1/16/2020	>	Email sobelj@h
	>	Member Type Full Time
	>	Employer
	>	Member Since 2/29/2020
	>	Hometown Woodstock, IL
	>	Birthday 4/5/1994

Event App

This is one of my apps that I developed with a non-profit that I help run. It allows us to create/edit events, sign people in, and view metrics. This also rolls up into a Power BI report where we can see avg age, attendance, and a map of hometowns.

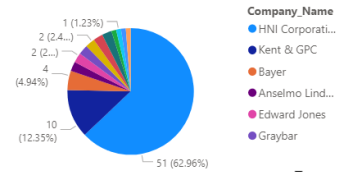
- Event_Name
- Bridgeside Closest to the Pin
 - March Madness
 - Membership Drive

Event_Name	Total Members	New Members
Bridgeside Closest to the Pin	40	4
Membership Drive	46	46

Count of Member_ID by Company_Name

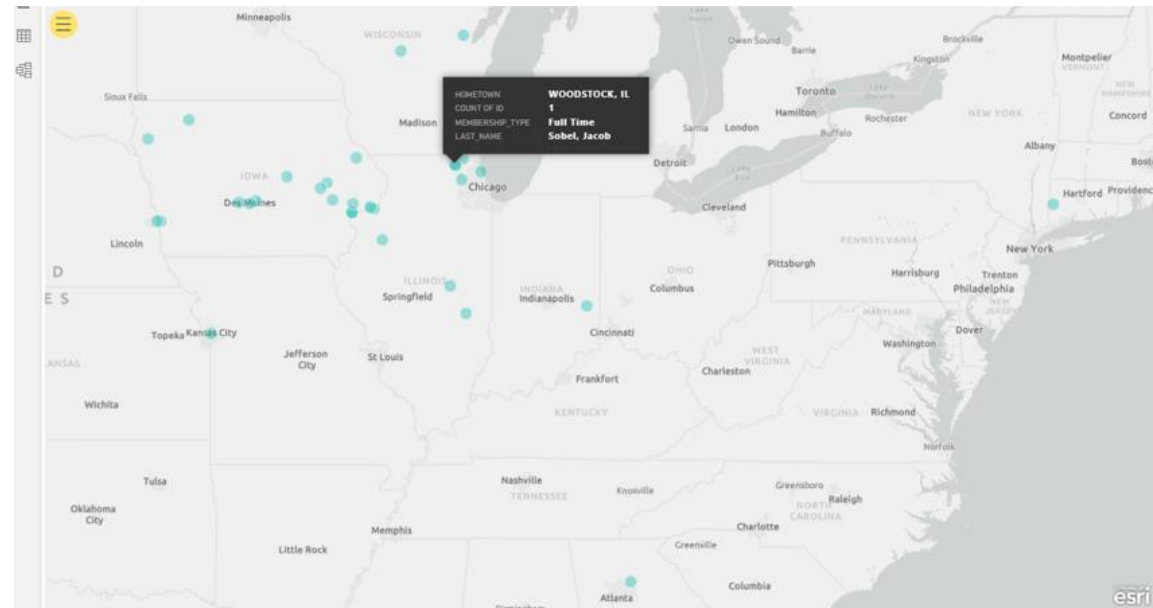
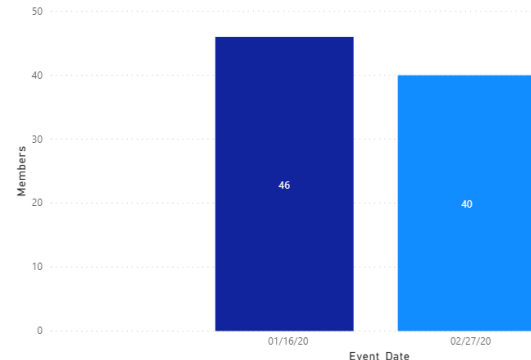
52

Total Members



Members by Event_Date and Event_Name

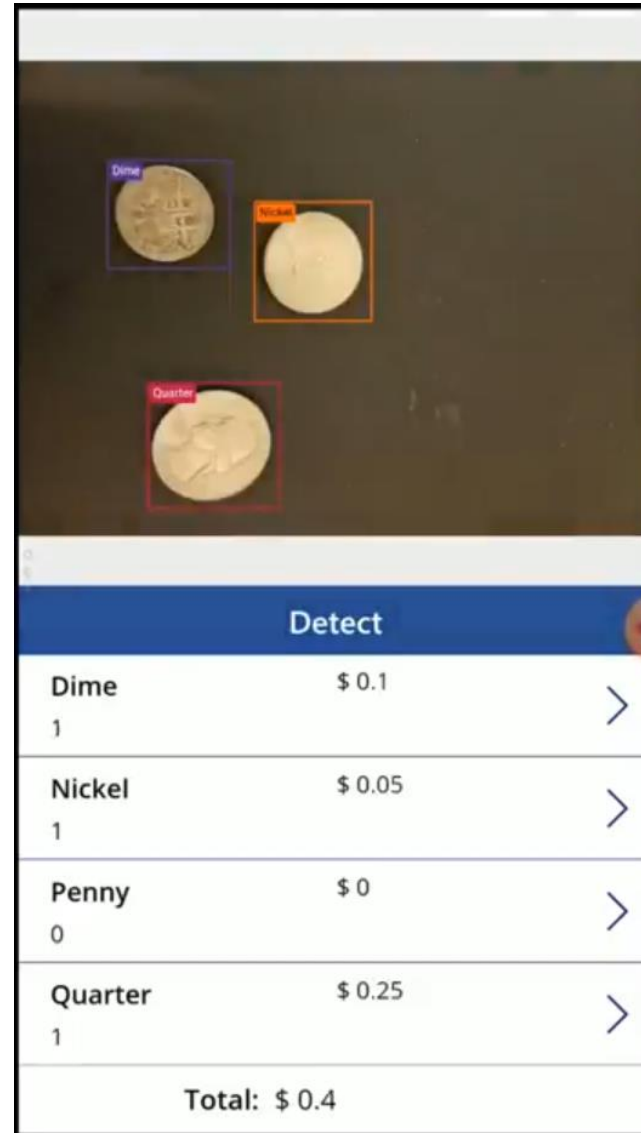
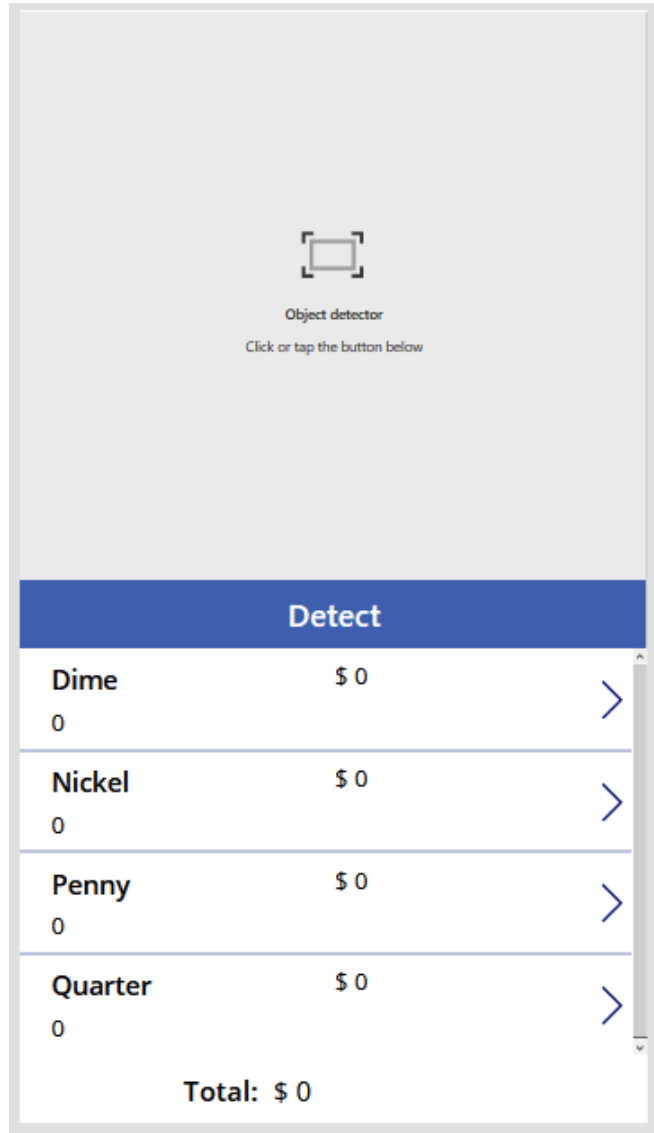
Event_Name ● Bridgeside Closest to the Pin ● Membership Drive



View Metrics

Event App

This is one of my apps that I made just to see the abilities of DataVerse and the AI functionality. I could take a picture of a pile of coins and it would recognize what was what and total it up.



Supplier Order Form

← Cart

Today's Date 7/28/2020

Hotel Ambassador Hotel ▼

Supplier Clean Supplies R Us ▼

Associate Name Sobel

Home Department 020 - Restaurant ▼

1AL1 CLAX ASSIST (GS-33)*
Size: 56.8L Price: \$173.97

Laundry alkaline builder to enhance the performance of detergents 2

CLAX HYPO CONC 42B1
Size: 18.9L Price: \$38.86

Chlorine destainer (12%) 0

CLAX HYPO CONC 42B1
Size: 56.8L Price: \$116.59

Chlorine destainer (12%) 0

CLAX DEOSOFT BREEZE +

1AL1 CLAX ASSIST (GS-33)*
56.8L
Qty: 2 Total Price: \$347.94

Order Number 35

Price \$347.94

Supplier Clean Supplies R Us

Supplier Email sobelj@jidokasolutions.com

Edit Products

View Cart

Clear Cart

Order

Supplies Ordering App

This is one of my apps that I made for a client so their workers could only order approved supplies from approved vendors. The worker can add or remove products and then create a work order all in the app.

Company X order by Sobel



Jacob Sobel
To Jacob Sobel

↩ Reply

Please complete the order below

Oder Information

Items:

Product	Qty	Total Price	
1AL1 CLAX ASSIST (GS-33)*	2	\$347.94	Ambassador Hotel

Thank you,
Company X
Phone: 815-861-2844
Email: sobelj@jidokasolutions.com
Website: www.businessautomata.com