

### Standard Work Order

#### Creating a Work Order on the Asgard Desktop Application

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The ability to create work orders in Asgard is permission-based. If you do not have this permission, and think you should, please contact [support@katanasoft.com](mailto:support@katanasoft.com).

Follow the steps below to create a Work Order.

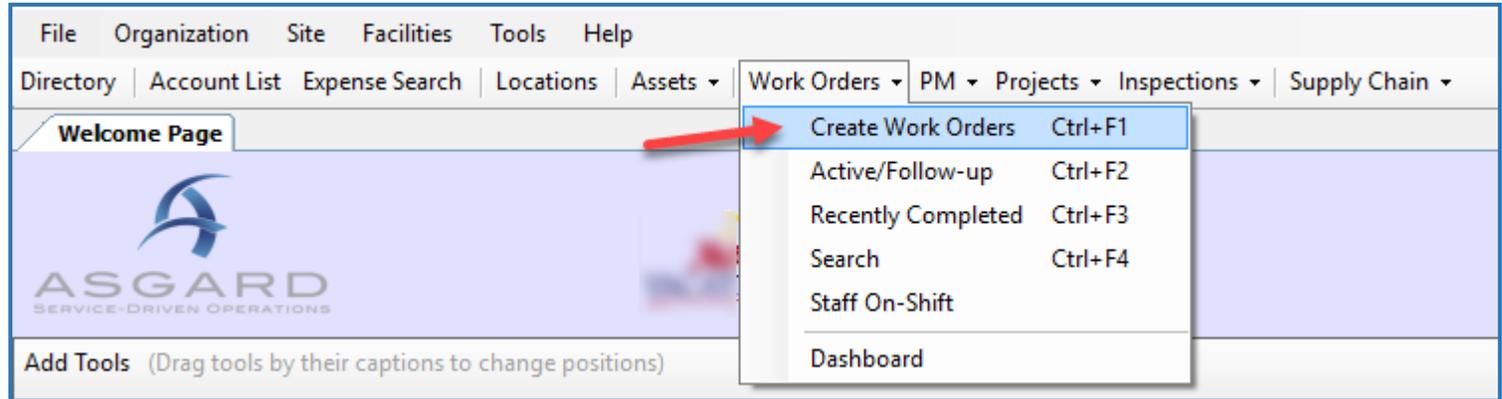


**Scenario:**

*A guest, Mrs. Jones, is calling from unit 4301 to request 3 additional (extra) Bath Towels to be delivered immediately, also there is a lightbulb out over the sink in the kitchen and she wants a crib delivered for her grandson who is arriving tonight and staying for three days.*

## Step 1

Go to the Work Order drop down and click “Create Work Order”.



Note: The Create Work Order screen was designed for rapid entry. No need to use your mouse; everything can be entered by typing and using the arrow and tab keys on your keyboard.

## Step 2

Enter the location. As you type in the numbers/letters Asgard will automatically filter for you. Find the location, use the arrow key, if needed, and **TAB**.

Directory | Account List | Expense Search | Locations | Assets ▾ | Work Orders ▾ | PM ▾ | Projects ▾ | Inspections ▾ | Supply Chain ▾

Welcome Page | **Create Work Order**

New Blank Work Order Refresh Lists Close

Location: 43

Reported By: #4301 (2 Bdrm - Lockoff)  
#4301 (Master)  
#4302 (Guest Villa)

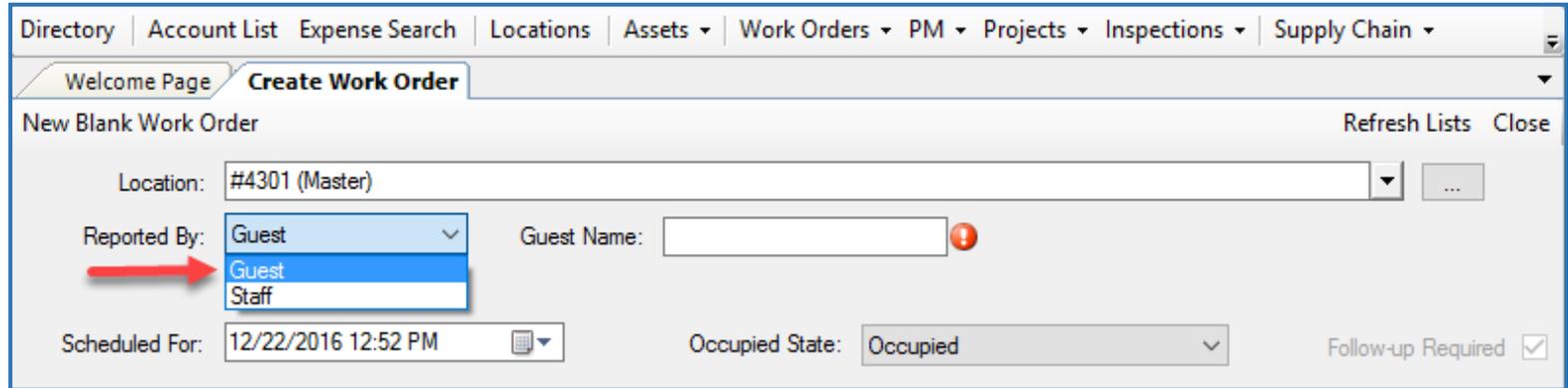
Scheduled For: #4303 (2 Bdrm - Lockoff)  
#4303 (Master)

Tasks: #4304 (Guest Villa)  
#4305 (2 Bdrm - Lockoff)  
#4305 (Master)  
#4306 (Guest Villa)

Required

### Step 3

Select Guest or Staff reported and tab.



Directory | Account List | Expense Search | Locations | Assets | Work Orders | PM | Projects | Inspections | Supply Chain

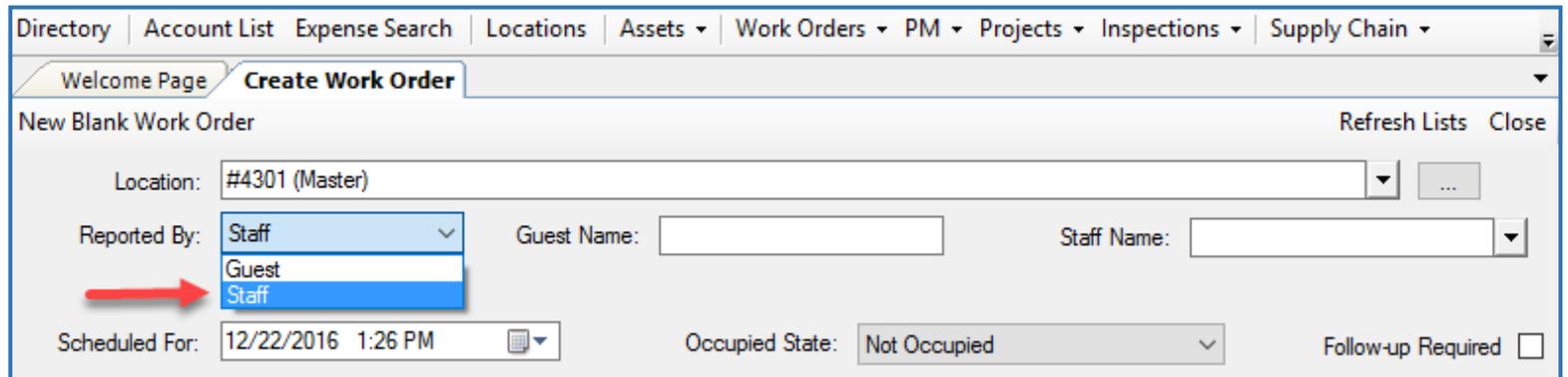
Welcome Page | **Create Work Order**

New Blank Work Order Refresh Lists Close

Location: #4301 (Master)

Reported By: **Guest** (dropdown menu open showing Guest and Staff) Guest Name:  

Scheduled For: 12/22/2016 12:52 PM Occupied State: Occupied Follow-up Required



Directory | Account List | Expense Search | Locations | Assets | Work Orders | PM | Projects | Inspections | Supply Chain

Welcome Page | **Create Work Order**

New Blank Work Order Refresh Lists Close

Location: #4301 (Master)

Reported By: **Staff** (dropdown menu open showing Staff and Guest) Guest Name:  Staff Name:

Scheduled For: 12/22/2016 1:26 PM Occupied State: Not Occupied Follow-up Required



Red balloons in Asgard denote a mandatory field. You must complete these fields in order to create the work order.

If your property has an interface between Asgard and your PMS system, the guest name and occupied status will populate automatically. If not, complete those fields.

#### Step 4

The Scheduled For field date/time defaults to the time the work order screen is opened. It can be changed to create a future Work Order. The system will automatically generate the work order for the pre-selected date/time.

Directory | Account List | Expense Search | Locations | Assets | Work Orders | PM | Projects | Inspections | Supply Chain

Welcome Page **Create Work Order**

New Blank Work Order Refresh Lists Close

Location: #4301 (Master)

Reported By: Guest Guest Name: JONES

Scheduled For: 12/22/2016 1:26 PM Occupied State: Occupied Follow-up Required

Status	Work Re	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Comple...	Deliver	4	5	6	7	8	9	10
Comple...	Deliver	11	12	13	14	15	16	17
Comple...	Repair T	18	19	20	21	22	23	24
Comple...	Repair T	25	26	27	28	29	30	31
		1	2	3	4	5	6	7

Departm	Start At	Assigned T	Tasks	Guest Na
Housek...	Fri 12/16 8:...	Pam Paul	Deliver Bath Towel	JONES
Housek...	Fri 12/16 8:...	Housekee...	Deliver Bath Towel	JONES
Enginee...	Fri 12/16 8:...	Randy Sims	Repair Toilet - Clogged / Won't Flush	WALKER
Enginee...	Fri 12/16 8:...	Matthew P.	Repair Toilet - Clogged / Won't Flush	WALKER



Note: The date and/or time listed in the **Scheduled For** field **affects all the tasks listed.**

**Step 5**

Always check the Pending and Recently Completed Work for the location. It shows the Work Orders for the last 7 days for this unit, and the guest name.

Directory | Account List | Expense Search | Locations | Assets | Work Orders | PM | Projects | Inspections | Supply Chain

Welcome Page **Create Work Order**

New Blank Work Order Refresh Lists Close

Location: #4301 (Master) ...

Reported By: Guest Guest Name: JONES

Scheduled For: 12/22/2016 1:26 PM Occupied State: Occupied Follow-up Required

Pending and Recently-Completed Work in #4301 (Master)

Status	Work Requested	Departm	Start At	Assigned T	Tasks	Guest Na
Comple...	Deliver Bath Towel	Housek...	Fri 12/16 8:...	Pam Paul	Deliver Bath Towel	JONES
Comple...	Deliver Bath Towel	Housek...	Fri 12/16 8:...	Housekee...	Deliver Bath Towel	JONES
Comple...	Repair Toilet - Clogged / Won't Flush	Enginee...	Fri 12/16 8:...	Randy Sims	Repair Toilet - Clogged / Won't Flush	WALKER
Comple...	Repair Toilet - Clogged / Won't Flush	Enginee...	Fri 12/16 8:...	Matthew P...	Repair Toilet - Clogged / Won't Flush	WALKER

## Step 6

In the Task field, type the core word of the model task – e.g. towel (stock item based), lightbulb (sub-location based), and crib (loaned item). Asgard will automatically filter the task list.

Pending and Recently-Completed Work in #4301 (Master)

Status	Work Requested	Departm	Start At	Assigned T	Tasks	Guest Na
Comple...	Deliver Bath Towel	Housek...	Fri 12/16 8:...	Pam Paul	Deliver Bath Towel	JONES
Comple...	Deliver Bath Towel	Housek...	Fri 12/16 8:...	Housekee...	Deliver Bath Towel	JONES
Comple...	Repair Toilet - Clogged / Won't Flush	Enginee...	Fri 12/16 8:...	Randy Sims	Repair Toilet - Clogged / Won't Flush	WALKER
Comple...	Repair Toilet - Clogged / Won't Flush	Enginee...	Fri 12/16 8:...	Matthew P...	Repair Toilet - Clogged / Won't Flush	WALKER

Tasks:

tow| 

- Deliver Bath Towel
- Deliver Bath Towel (Exchange)
- Deliver Dish / Kitchen Towel
- Deliver Dish / Kitchen Towel (Exchange)
- Deliver Hand Towel
- Deliver Hand Towel (Exchange)
- Deliver Kitchen Towel Set
- Deliver Kitchen Towel Set (Exchange)
- Deliver Paper Towel



Select the model task Deliver Bath Towel and tab.

Fill in necessary and required fields (indicated by red balloons).

- Extra Request - An Extra request is when a guest asks for **more** of what is **already** stocked in the room as part of the par standard, such as towels, hangers, coffee, etc. What is not an extra request is something that is **not** stocked in the room, like a crib.
- Quantity
- Notes – any additional information the associate needs in order to complete the work order.
- Assign, if appropriate - The Assign To drop down list is filtered for user's On-Shift for the department that should complete the task.

Tasks:

Deliver Bath Towel Remove

Priority: High Extra Request Yes Remove

Item: Bath Towel Qty: 3

Notes:

Assign To: [Nobody]

Type here to add a task Remove

Add the next task - Repair Light Bulb (sub-location task) and tab.

Fill in the required and necessary fields.

- Sub-location - any area in the unit where the work needs to be done.
- Notes - any additional information that the technician might need to complete the work order, e.g. the burned out light bulb is over the sink.
- Assign, if appropriate.

Tasks:

Repair Light - Bulb / Light Out Remove

Priority: High

Sublocation: Remove

Notes:

Assign To: [N]

Type here to add a t Remove

Dining Room

Entry

In the main location itself

Kitchen

Living Room

Master Bathroom

Master Bedroom

Unit

Tasks:

Assign To: [Nobody]

Repair Light - Bulb / Light Out Remove

Priority: High

Sublocation: Kitchen

Notes: Over the sink

Assign To: [Nobody]

Type here to add a task Remove

Enter the last task - Crib. This task has an automatic follow on task for Pick Up Crib. Ask guest when the crib will be ready for pick up, select the date, and the system will automatically create the Follow-on work order for *Pick Up Crib* at the pre-selected date/time.

Tasks:

Assign To: [Nobody]

Deliver Crib Remove

Priority: High Extra Request

Item: Crib Qty: 1

Notes:

Schedule Follow-on For:  1/ 3/2017 10:00 AM Pick Up Crib

Assign To: [Nobody]



A crib is not an Extra Request because it is not stocked in the room.

### Step 7

Once you have filled in all the required and necessary fields click the shining **Create Workorder(s)** button. You will be returned to the blank Create Work Order screen. The work order(s) you created can be found on the Active/Follow Up screen.

Tasks:

Deliver Bath Towel	Remove
Priority: High	Extra Request: Yes
Item: Bath Towel	Qty: 3
Notes:	
Assign To: Pam Paul	
	Remove

**Create Workorder(s)** Clear