






Work Order Management – PMs / Inspections

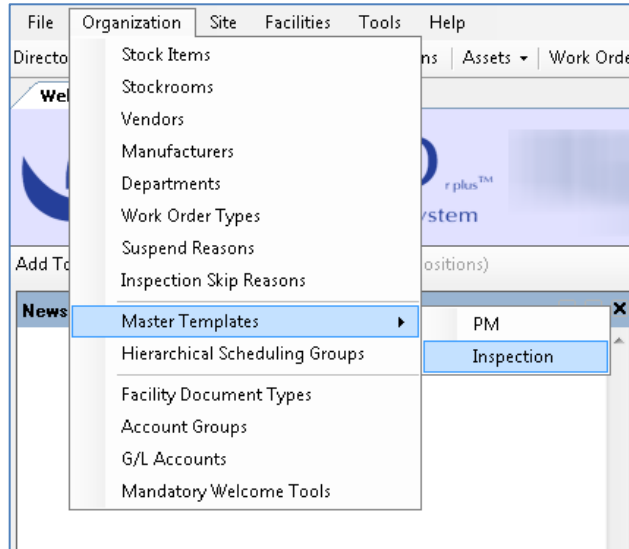
Viewing & Editing Organization-Level Templates

Follow the steps below to view/edit Organization-Level Preventive Maintenance and/or Inspection Templates.

	<p>Scenario: <i>From time to time, the needs of your Preventive Maintenance or Inspection programs may change. To reflect those changing needs, you may wish to edit your organization-level program templates.</i></p>
	<p>Note: You must have administrator-level permissions to update templates. If you do not have this level of access, and believe that you should, please contact support@katanasoft.com.</p>
	<p>Note: The Organization-level Master Templates are “inherited” into site-level templates, which are scheduled at the site to create the active work orders. Core Tasks are included in every work order – they are the main tasks created in the Organization-Level Master Template. Flex Tasks may or may not be allowed, but they are supplemental tasks added explicitly at the site level.</p> <p>The weighting for Inspection templates may be changed at the Organization level for core tasks, and at the site level for flex tasks.</p>

Step 1

Open the Organization menu, select Master Templates, then choose whether you want to view/edit PM or Inspection templates.

**Step 2**

When the Manage Master Templates screen opens, you will see a list of available templates.

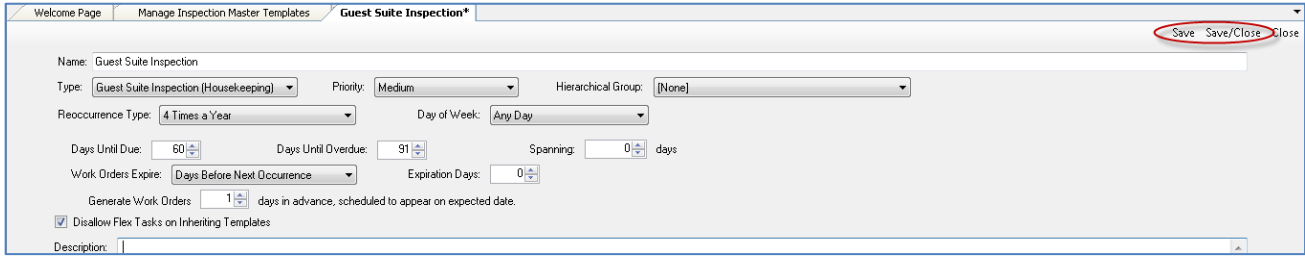

Welcome Page Manage Inspection Master Templates				
New Template Edit Delete				
Name	Department	Type	Reoccurs	Expires
Guest Suite Inspection	Housekeeping	Guest Suite Inspection	4 Times a Year on Any Day	0 Days Before Next Oc
Pre-Arrival Maint Checklist	Engineering	Pre-Arrival Inspection	Every Week on Any Day	Never
QA Inspection	QA	Guest Suite Inspection	4 Times a Year on Any Day	0 Days Before Next Oc

Step 3

Open the template you would like to view/edit, by double-clicking the template in the grid. Or, you can single-click the template and then click the Edit button.

Step 4

The template will launch in a new screen, which includes all of the details about the PM or Inspection work orders that will be generated from the template, including the reoccurrence rate, due/overdue limits, whether Flex Tasks are allowed, and the tasks that are included.

	<p>You can edit any of this information by updating the relevant fields on the screen.</p>
<p>Step 5</p>	<p>Commit your changes, by clicking Save or Save/Close (which will also close the template screen), on the upper right hand side of the screen.</p>  <p>The screenshot shows a web interface for managing inspection templates. The title bar reads 'Welcome Page Manage Inspection Master Templates Guest Suite Inspection*'. The main form contains the following fields: Name: Guest Suite Inspection; Type: Guest Suite Inspection (Housekeeping) (dropdown); Priority: Medium (dropdown); Hierarchical Group: [None] (dropdown); Recurrence Type: 4 Times a Year (dropdown); Day of Week: Any Day (dropdown); Days Until Due: 60 (spinners); Days Until Overdue: 91 (spinners); Spanning: 0 (spinners) days; Work Orders Expire: Days Before Next Occurrence (dropdown); Expiration Days: 0 (spinners) days; Generate Work Orders: 1 (spinners) days in advance, scheduled to appear on expected date; <input checked="" type="checkbox"/> Disallow Flex Tasks on Inheriting Templates; Description: (text area).</p>
	<p>When the template is updated, the changes will flow through to the site level templates. The changes will not affect orders that are already active in the system. Your changes will appear when the next occurrence of the template generates new work orders.</p> <p>If you need to make immediate changes to your program (including active work orders), please contact support@katanasoft.com for assistance.</p>