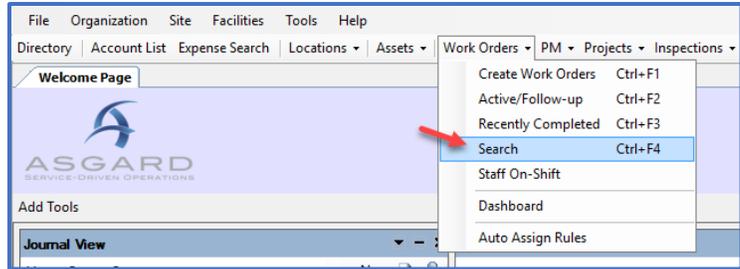


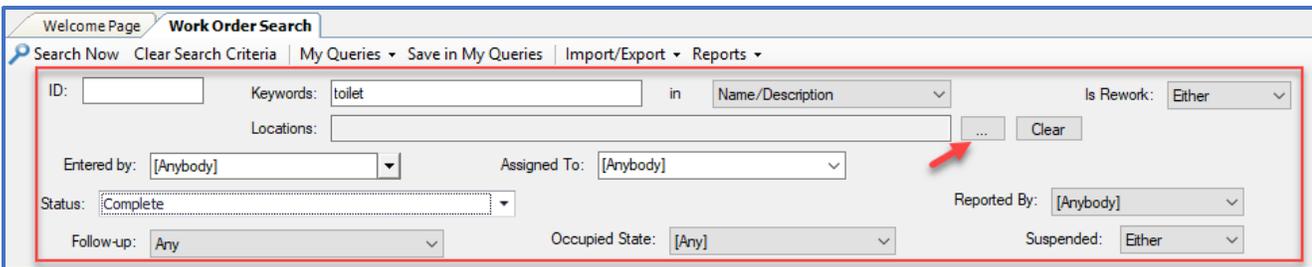
Creating and Saving a Search Query

Follow the steps below to create and save a work order search query. The steps below can be used to search for and save Standard Work Orders, PMs, and Inspections. For assistance with work order queries, please contact support@katanasoft.com.

Step 1: In the Work Orders drop-down, select **Search**.



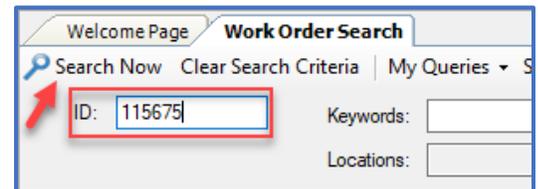
Step 2: In the top half of the screen, use the following fields to select your search criteria:



- Keywords
- Locations – use the Ellipses button to select
- Is Rework
- Entered by
- Assigned To
- Status – defaults to Incomplete
- Reported By
- Follow-up
- Occupied State
- Suspended



Note: The ID field is used to search for a specific work order. If you know the ID and are searching for only one work order, enter the ID and click the **Search Now** button. All other fields can be left at the defaults.



Step 3: In the Advanced Search Criteria section, add additional criteria as needed

Advanced Search Criteria

Priority From: To:

Expected to Start From: 0 Days Ago To: 0 Days Ago

From Time: to

Completed From: 90 Days Ago To: 0 Days Ago

From Time: to

Include Future Scheduled Items Includes an "Extra Request":

Types:

- Bell Staff
- Engineering
- Front Office
- Safety & Security
- Housekeeping
- PBXPT
- Sales & Marketing
- IT

- Priority From
- Expected to Start From **or** Completed From date range
- Include Future Scheduled Items
- Is the work order task an "Extra Request"
- Types - the Department completing the work



Note: Leaving the dates unselected will return all matching work orders in Asgard (which can be a large data pull).

Step 4: Once you have entered all of your search criteria, click the **Search Now** button in the upper left.

Welcome Page **Work Order Search**

Search Now Clear Search Criteria My Queries

ID: Keywords: Locations:

A list of all work orders matching the criteria will populate at the bottom of the screen.

Aging	ID	Status	Entry Date	Location	Request	Assigned To	Completed	Department	Expected Start	Last Assignment
	57622	Complete	4/15/2019 8:03 AM	Unit #23301 (2 Bdrm)	Repair Toilet - Clogged	Edwards (KATANA TEST)...	4/15/2019 8:...	Engineering	3/12/2019 12:30 PM	4/15/2019 8:03 AM
	57876	Complete	6/6/2019 11:40 AM	Unit #12200 (2 Bdrm)	Repair Toilet - Clogged	Johnstone, Andy	6/6/2019 11:...	Engineering	6/6/2019 11:40 AM	6/6/2019 11:40 AM
	57877	Complete	6/6/2019 11:41 AM	Unit #12200 (2 Bdrm)	Repair Toilet - Clogged	Hamp, Josh	6/6/2019 11:...	Engineering	6/6/2019 11:41 AM	6/6/2019 11:41 AM
	57748	Complete	5/8/2019 2:45 PM	Unit #32303 (2 Bdrm)	Repair Toilet - Clogged	Edwards (KATANA TEST)...	5/14/2019 10:...	Engineering	5/14/2019 10:30 AM	5/8/2019 2:45 PM
	57754	Complete	5/8/2019 2:58 PM	Unit #12300 (2 Bdrm)	Repair Toilet - Clogged	Edwards (KATANA TEST)...	5/14/2019 10:...	Engineering	5/14/2019 10:35 AM	5/8/2019 2:58 PM

5 Items

Step 5: If you are satisfied that the search is providing the data you need, click the **Save in My Queries** button.

Welcome Page **Work Order Search**

Save in My Queries Search Now Clear Search Criteria My Queries Import/Export Reports

ID: Keywords: in

When the Name Query box opens, enter a descriptive name and click **OK**.

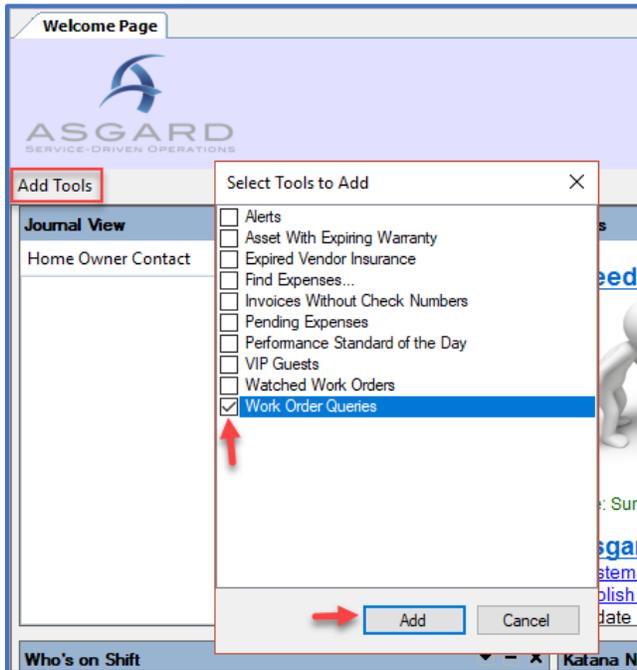
Name Query

Query Name:

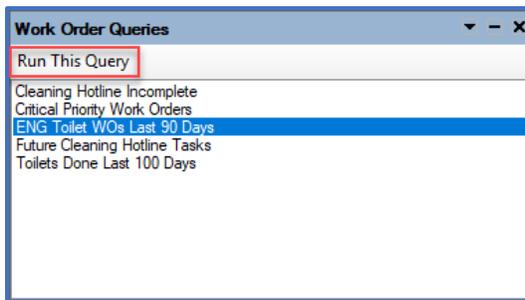
OK Cancel

Step 6: There are two ways to retrieve/view Saved Queries:

1. On the Welcome Page, click the **Add Tools** button, check the box for Work Order Queries, and click **Add**.



The Work Order Queries tool will be added to your Welcome Page. Highlight the Query and click Run This Query.



The system will open the Work Order Search Screen displaying the results of the query.

2. On the Work Order Search screen, open the My Queries drop-down and select the search you want to run. This is also where you manage your Queries

