

Publish Notes – Desktop Application & AsgardMobile

Asgard Desktop Application v2.0.0.502



Affected Workflows

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Mobile Applications

AsgardMobile – Current App



Maintenance – Various Fixes/Changes

Small enhancements and fixes to caching and queuing behavior, to improve performance under disconnected/unreliable connectivity states. Specifically, increasing the duration and total number of attempts to resend content, increasing the scope of items queued for sending, and reprioritizing the items that are stored offline to better match the end-user workflow.

This version will require installation/update. When available in the Apple and Android stores, we will send a separate announcement.

AsgardMobile 2.0

Launch / Work Order Search

This sprint we are validating the production release process for the new app, and introducing Work Order Search by Location to the field.



This version will require installation/update. When available in the Apple and Android stores, we will send a separate announcement.

Desktop Application

Maintenance

Infrastructure Planning / General Maintenance

This sprint, we updated our primary and secondary line capacities to increase throughput and redundancy during “busy” times. This is also a milestone in our long-range planning for increased use of regional data centers.

Various Fixes / Changes

Small enhancements and fixes, in various areas of the system, arising from automated reporting of system performance and user experience reports. The areas impacted include:

- Error logging for the Active/Follow-Up Screen
- Inspections Dashboard Counters
- Edit Configurations Permissions – Allow Location Edit
- RPR Reports, Tax Rate Display
- Stock Items, Record Transactions in Site Local Time

“Grids” – Enhancements to Screens that Function like Excel

We are at the beginning of a long-term maintenance project to upgrade all “grids” throughout the system, to enable enhanced search, filter, and sort behavior for lists. The Cleans module, which was built with the enhanced tools, was the first grid to feature these

Clean ID	Clean Aging Status	Location	Clean Type	Expected Start
8	Overdue	Unit #24302 (1 Bdrm)	Check Out Clean	12/13/2017 8:30 AM
9	Overdue	Unit #24304 (2 Bdrm)	Check Out Clean	12/13/2017 8:30 AM
10	Overdue	Check-in / Sales Bldg	Check Out Clean	12/18/2017 8:30 AM
11	Overdue	Unit #22302 (1 Bdrm)	Check Out Clean	12/19/2017 8:30 AM
17	Overdue	Unit #12300 (2 Bdrm)	Check Out Clean	1/26/2018 8:30 AM
18	Overdue	Unit #19101 (2 Bdrm)	Check Out Clean	1/26/2018 12:00 PM
20	Overdue	Unit #19102 (1 Bdrm)	Check Out Clean	1/27/2018 10:00 AM
21	Overdue	Unit #12303 (1 Bdrm)	Check Out Clean	1/30/2018 8:30 AM
22	Overdue	Unit #19101 (2 Bdrm)	Check Out Clean	1/30/2018 4:00 PM
23	Overdue	Unit #19103 (1 Bdrm)	Check Out Clean	2/1/2018 12:00 PM

Highlights of Enhancements with the new grid:

- Filters dynamically recognize and provide tools appropriate to the data type (see dates at left)
- Combine multiple filters
- Custom/Keyword search
- And much more!

To see a quick video on the new features, click this link:

[Grid Enhancement Video](#)

enhancements.

This sprint, the following additional Grids/Tools were updated:

- Units List
- Owner List
- Stock Item UPC List
- Auto Assign Rules and Groups Lists
- Logging Lists
- Stock Item UPCs Control
- Finance Account Selection Form
- Facility Documents List
- Billable Actions List
- Add Owner to Unit Control
- Training/How To Documents List
- Mobile Device List

Work Order Management

Active/Follow-Up, Correct Summary Bar and Persistently Expand Groups

We have made two usability enhancements to this screen – Adding in summary filters to count the number of pending work orders and follow-ups, and persistently expanding user-defined groups. Previously, groups would “collapse” or close, when the screen refreshed.

Aging	ID	Location	Work Requested
Assigned To : [None] (7 items)			
< This is a Group			
Aging	ID	Location	Work Requested
REWORK	44214	Unit #12203 (1 Bdrm)	Repair Toilet - Clogged
REWORK	44272	Unit #13202 (1 Bdrm)	Pick Up Dirty Towels
OVERDUE	44210	Unit #12300 (2 Bdrm)	Pick Up High Chair
OVERDUE	44194	Unit #11205 (1 Bdrm)	Pick Up Crib
OVERDUE	44325	Unit #20101 (2 Bdrm)	Repair Toilet - Running
OVERDUE	44189	Unit #14105 (2 Bdrm)	Pick Up Blender
OVERDUE	44348	Check-in / Sales Bldg, Lobby Te...	Deliver Coffee Pot
7 Work Orders			
Assigned To : Beddingfield, James (Tower 1) (1 item)			

PM Matrix, Add Filter for Unit Occupied Status

For our customers who use the Occupied Status API (interface to PMS), to provide unit status in Asgard, you can now filter the PM Matrix by availability.

This functionality provides a targeted way to view needed PMs, by unit status, in a priority order. This information will also to be added to the Active PM and Active Inspection screens, in the future.

This functionality/info will only show if the interface is enabled

The screenshot shows the 'PM Matrix - Unit A/C Coil Clean PM-ANN' interface. At the top, there are tabs for 'Welcome Page', 'Active PM Work - Engineering', and 'PM Matrix - Unit A/C Coil Clean PM-ANN'. Below the tabs, there is a checkbox for 'Show Last Completion Date' and a filter dropdown menu set to 'Occupied Status'. The main area contains a grid of work order cards. Each card displays a unit number (e.g., #1 (2 Bdrm)), status (e.g., Dirty - Occupied), and completion date (e.g., Last completed on 4/14/2017). A dropdown menu is open over the grid, showing options: (Select All), Clean - Available, Clean - Occupied, Dirty - Available, Dirty - Occupied, Inspect - Available, and Inspect - Occupied. The grid contains 16 cards in a 4x4 layout.

Workflows, Enhance Standard Work Order Create to Support Import with Billable Actions

We have enhanced the available tools for Standard Work Order Creation, to include an import capability. The import form and Import functionality are both available from the Work Order Search screen.

The screenshot shows the 'Asgard -- Sunset West (Sunset Vacation Resorts)' interface. At the top, there is a navigation menu with 'File', 'Organization', 'Site', 'Facilities', 'Tools', and 'Help'. Below the navigation menu, there is a 'Directory' section with links to 'Account List', 'Expense Search', 'Locations', 'Assets', 'Work Orders', 'PM', 'Projects', and 'Inspections'. The main area is titled 'Work Order Search' and contains a search form with fields for 'ID', 'Keywords', and 'Locations'. There are also dropdown menus for 'Entered by' and 'Assigned To', and a 'Status' dropdown menu. A dropdown menu is open over the search form, showing options: 'Import/Export' and 'Reports'. The 'Import/Export' dropdown is further expanded to show 'Create Blank Import File' and 'Import Work Orders'.

This functionality is designed to support workflows, especially billable workflows, that are recurring or otherwise repetitive in nature and not otherwise supported in manual creation (or alternate workflows, such as PM or Inspection).

Auto Assign, Enhance to Assign at Expected Start

As a user, you can decide whether the requested work (standard work order) should be completed now or in the future (Expected Start). Currently, when the Expected Start is in the future, and there are auto-assign rules in place, the system does not assign at Create. When the work order would become due, it would require manual assignment.

Now, the system will run the auto-assignment rules at the Expected Start.

Note: Work orders that are Returned to Incomplete, after being previously assigned, will not be reassigned.

Auto Assign, Add Priority to Support “Ranking” for Rules that Conflict

In certain instances, a site may have two (or more) auto-assign rules that could both be applied to a single work order. In this instance, I need to be able to specify the rule that “wins” in the result of a conflict. For example, I want a work order to go first to the Engineering team. If there is nobody on shift, then I want the Security team to receive the work order.

Previously, rules were ranked by the number of parameters in the rule -- more parameters, "wins." With this publish, we have added an explicit priority ranking.

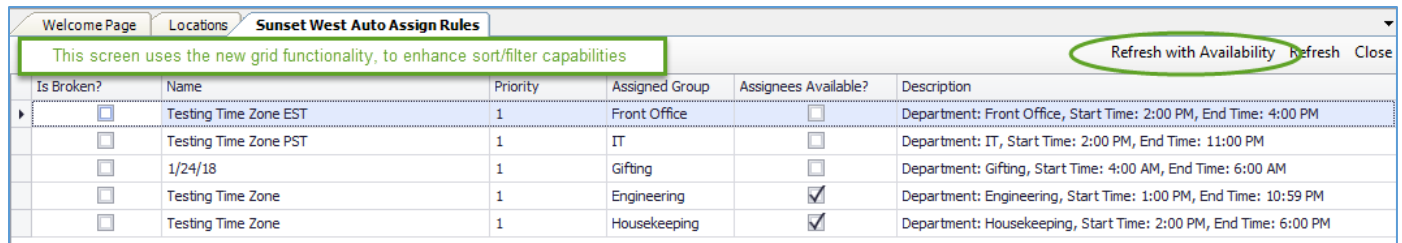
For help with auto-assign, or to add this functionality to your site, please contact support@katanasoft.com.

Auto Assign, Add Rules View, Test Capabilities to Desktop Application

By customer request, we have added a viewer for the auto-assign rules to Asgard, under the Standard Work Order menu.

Availability of users can change rapidly, so the screen will initially load with current availability. But, if the user leaves it open, he/she will need to click “Refresh with Availability” to update the list.

If the “Is Broken?” column is checked, the rule has Invalid Parameters, such as no users currently on shift in the associated auto-assign group.



Is Broken?	Name	Priority	Assigned Group	Assignees Available?	Description
<input type="checkbox"/>	Testing Time Zone EST	1	Front Office	<input type="checkbox"/>	Department: Front Office, Start Time: 2:00 PM, End Time: 4:00 PM
<input type="checkbox"/>	Testing Time Zone PST	1	IT	<input type="checkbox"/>	Department: IT, Start Time: 2:00 PM, End Time: 11:00 PM
<input type="checkbox"/>	1/24/18	1	Gifting	<input type="checkbox"/>	Department: Gifting, Start Time: 4:00 AM, End Time: 6:00 AM
<input type="checkbox"/>	Testing Time Zone	1	Engineering	<input checked="" type="checkbox"/>	Department: Engineering, Start Time: 1:00 PM, End Time: 10:59 PM
<input type="checkbox"/>	Testing Time Zone	1	Housekeeping	<input checked="" type="checkbox"/>	Department: Housekeeping, Start Time: 2:00 PM, End Time: 6:00 PM

This information can also be exported to Excel, by right-clicking in the grid.

Billing

Billing Search, Add Summary Bar for Parts, Vendor, and Labor Totals

We have added in a summary bar that conveniently totals the Parts, Vendor and Labor Charges on the Billing Search Screen.

The screenshot shows the 'Billing Search' interface with search filters and a table of billing items. The table includes columns for Billing Description, Date Entered, Total Charge, Parts Cost, In Rental Program, Labor Cost, Vendor Cost, Parts Markup, Labor Markup, and Vendor Markup. A summary bar at the bottom of the table provides totals for these categories.

Billing Description	Date Entered	Total Charge	Parts Cost	In Rental Program	Labor Cost	Vendor Cost	Parts Markup	Labor Markup	Vendor Markup
Repair Oven Door - Damaged / Broken	1/12/2018 3:59 P...	\$32.50	\$0.00	<input checked="" type="checkbox"/>	\$32.50	\$0.00	\$0.00	\$0.00	\$0.00
Repair Stairs	1/25/2018 4:11 P...	\$260.00	\$0.00	<input checked="" type="checkbox"/>	\$260.00	\$0.00	\$0.00	\$0.00	\$0.00
Repair Cabinet (see notes), Repair Faucet.	1/16/2018 2:43 P...	\$104.00	\$0.00	<input type="checkbox"/>	\$104.00	\$0.00	\$0.00	\$0.00	\$0.00
Check Belts/Change Filters/Oil Pool Air H...	1/14/2018 2:46 P...	\$104.00	\$0.00	<input checked="" type="checkbox"/>	\$104.00	\$0.00	\$0.00	\$0.00	\$0.00
Bldg Mice Rental Unit PM Inspection	1/26/2018 1:02 P...	\$95.00	\$0.00	<input checked="" type="checkbox"/>	\$78.00	\$0.00	\$0.00	\$17.00	\$0.00
Repair Fan / Vent, Repair / Replace Sign	1/23/2018 10:24...	\$0.00	\$0.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Replace Carbon Monoxide Detector	1/22/2018 11:42...	\$52.00	\$0.00	<input checked="" type="checkbox"/>	\$52.00	\$0.00	\$0.00	\$0.00	\$0.00
Repair Unowc. Door	1/23/2018 11:03...	\$6.00	\$0.00	<input checked="" type="checkbox"/>	\$6.00	\$0.00	\$0.00	\$0.00	\$0.00
Boiler Checks PM-DLY (TI)	1/3/2018 6:51 AM	\$13.00	\$0.00	<input checked="" type="checkbox"/>	\$13.00	\$0.00	\$0.00	\$0.00	\$0.00
Boiler Checks PM-DLY (ES/LN)	12/28/2017 11:4...	\$26.00	\$0.00	<input checked="" type="checkbox"/>	\$26.00	\$0.00	\$0.00	\$0.00	\$0.00
Boiler Checks PM-DLY (ES/LN)	12/28/2017 11:4...	\$26.00	\$0.00	<input checked="" type="checkbox"/>	\$26.00	\$0.00	\$0.00	\$0.00	\$0.00
Boiler Checks PM-WKLY (TT Pool/QU Po...	12/30/2017 2:23...	\$26.00	\$0.00	<input checked="" type="checkbox"/>	\$26.00	\$0.00	\$0.00	\$0.00	\$0.00
Adjustments for Repair Toilet (see notes)	1/8/2018 11:00 A...	\$13.00	\$0.00	<input checked="" type="checkbox"/>	\$13.00	\$0.00	\$0.00	\$0.00	\$0.00
Repair / Install TV Mount	1/30/2018 5:50 A...	\$164.00	\$0.00	<input type="checkbox"/>	\$164.00	\$0.00	\$0.00	\$0.00	\$0.00
		\$76.438	\$169		\$70.598	\$0	(\$102)	\$5,773	\$0

Billing Description, Enhance to Support Updates without Further Approval

Billings carry important Description information, which is often used to communicate details about Billed Actions/Items to Owners. Throughout the Billing workflow, this information may be updated but doesn't require specific approval.

By customer request, we have enhanced the system to refresh the information but not regenerate the Billing or change the Approval Status. This change will cause all billings associated with the work order to be updated, regardless of if they have already been billed.

Labor Rates, Costs, Update Rate When Selected

We have corrected a reported issue in which updated rates would revert to their original values when the user closed and reopened the work order details.

Cleans – In Beta



Among the numerous and varied responsibilities of the “back of the house” Resort Operations teams, arguably the most critical is the daily turnover from Occupied/Dirty units to Clean/Available Inventory. This process goes by many names, such as “Breaking Out the House,” “House Breakout,” and “Daily Cleans”. It generally always includes stripping and re-stocking the units, repairing maintenance issues, and cleaning and inspecting for guest arrival.

Important Background

In previous updates, we published Cleans permissions, Create Cleans, Active Cleans, and Template/Type set-up, and Cleans Import functionality. There are five levels of access: No Access, View, Assignee, Manager, and Scheduling Manager.

Cool Stuff: Even if you are NOT using Cleans, these permission flags can be used to define roles in Housekeeping for reporting purposes. We have successfully leveraged the flags, for example, in reports to calculate performance against goals for Housekeeping Inspections.

For access at your organization, we must turn on specific flags on your account set-up. For questions or concerns, or to gain access to the Cleans import format, contact support@katanasoft.com.

Enhancements this sprint:

Permissions Updates for Import

We have corrected a permissions issue, which was previously only allowing System Administrators to be able to import Cleans.

Console App, Enhance Output to include Asgard Import Format

By customer request, we have enhanced the Console Application – a separate application, outside of Asgard desktop, that generates a Cleans list based on business rules – to auto-generate the data in the needed format for import.