

# Publish Notes – Desktop Application

## Asgard Desktop Application v2.0.0.503



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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.



This version will require installation/update. When available in Android store we will send a separate announcement. Timeline/next steps for the Apple devices will be announced at a later time.

### AsgardMobile 2.0

#### Launch / Work Order Search

We are continuing User Acceptance Testing, on the new app which introduces credential-based log-in (no IDs) and Work Order Search by Location to the field.



Over the next few sprints, we will be pursuing continued development of the application as our top priority.

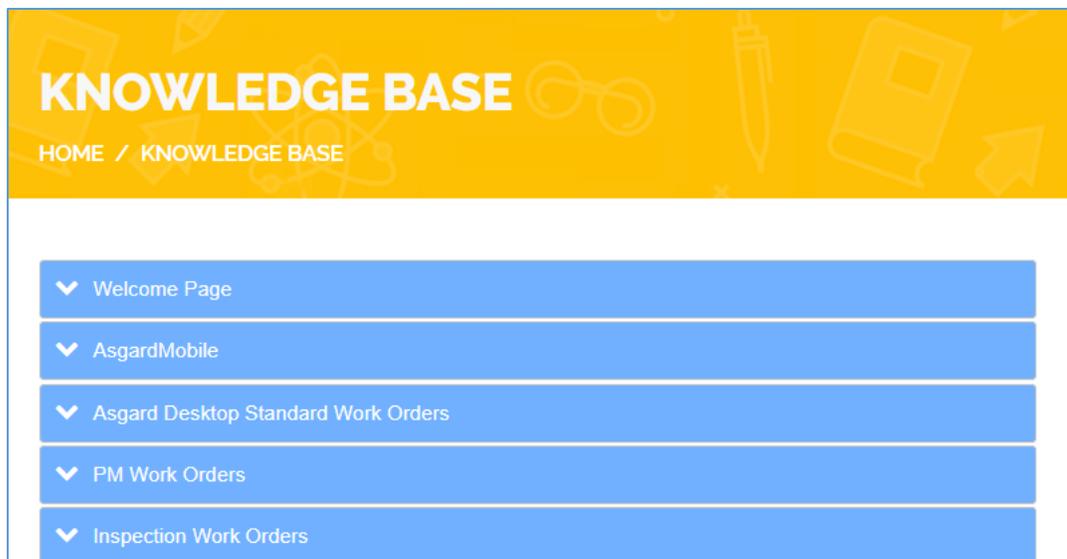
We are continuing to gather customer feedback, and suggestions on which functionality to deploy next. Make your voice heard at [support@katanasoft.com](mailto:support@katanasoft.com)

## Desktop Application

### Maintenance

#### Hyperlink from Asgard to Learning Portal

In support of our May launch of the Asgard Learning Portal, we have added convenience links to the main app Help menu. These links will take users directly to the video-based Courses, and the printable resources in the Knowledge Base.



## Various Fixes / Changes

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

## “Grids” – Enhancements to Screens that Function like Excel

We are mid-stream on a long-term maintenance project to upgrade all “grids” throughout the system, to enable enhanced search, filter, and sort behavior for lists.

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

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!

- Owners
- Owner Insurance Policies
- Owner Unit Notes and Alerts
- Assets – Pending Expenses
- Assets – Completed Expenses
- Assets – Open Work Orders
- Assets – Documents
- Asset Type List
- Occupied Status List
- Add Locations to Mass Inspections/PM
- WO Template – Core Tasks
- WO Template – Flex Tasks
- WO Template – Stock Items
- Model Task List
- Log (Optimizations from previous)

## Locations

### Changes / Enhancements to handling of Occupied Status and Reservations

This is the first of several sprints/iterations of development in this area. Below are the current and future state functionality. We are presenting both, simultaneously, for clarity of our plans. We will provide subsequent updates as the “future” functionality is delivered.

#### Make Occupied Status “Live” on Work Orders – All Types

We have enhanced Occupied Status on Work Orders, including Standard, Inspection, and PMs:

- Occupied Status is only available on Incomplete work orders
- The Guest Name is fixed, once added to the work order as a Reported By Name
- Occupied Status is persistently “current” based on updates, when either an interface is updating the status, the user updates the status during Work Order Create, or when there is a manual import (future functionality).

On the Create Work Order screen, if the work order is reported by Guest and there is an available Guest Name (for example, from the API), then it will auto-populate as a convenience:

Welcome Page **Create Work Order**

New Blank Work Order

Location: Unit #2124 (2BD-WV)

Reported By: Guest **Reported By Guest: DAVID CLEVENGER**

Scheduled For: 4/20/2018 9:21 AM

Follow-up Required

Occupied Status

Occupied State: Clean - Available Guest Name: DAVID CLEVENGER

The user can edit the Reported by Guest field, even if it is auto-populated (consistent with the previous behavior). And, the user can add a name to the field, if it is blank.

On the Work Order Detail screen, for Incomplete work orders, both sets of information show separately:

Request: Deliver / Repair Sofa

Location: Unit #2124 (2BD-WV)

Reported By: Guest **Reported By Guest: DAVID CLEVENGER**

Type: Delivery (Engineering - FF&E) Priority: Medium  Follow-up Required

Occupied Status

Occupied State: Clean - Available Guest Name: DAVID CLEVENGER

If the User changes the location of the work order, the Reported By Guest will not change. This is useful, for example, in the case of a pre-registration amenity delivery.

### Reservations Information

We have enhanced the fields available in Asgard for tracking current and future Guest Reservations. This is currently View-Only, awaiting further development.

Next sprint we will be moving forward on the ability to Import Reservation Status by Location, and to post by a new Property Management System interface (API) specifically for Reservation Status.

### Occupied Status and Reservation Look-Up

We have enhanced the Locations menu, to include a Reservations option. When selected, the user can view the list of available Reservations, Current Occupied Status, and Guest Name for that location.



Welcome Page Location Occupied Status and Reservations				
Drag a column header here to group by that column				
Location Name	Site Name	Location Path	Location Guest Name	Occupied Status
Unit #19102 (1 Bdrm)	Sunset West	Sunset West - Vacation Resort, Village 1, Lodge & Spa HOA, Bldgs, Bldg 19, Floor 1, Unit #19102 (1 Bdrm)	Harris	Not Occupied
Unit #19101 (2 Bdrm)	Sunset West	Sunset West - Vacation Resort, Village 1, Lodge & Spa HOA, Bldgs, Bldg 19, Floor 1, Unit #19101 (2 Bdrm)	Gordon	Occupied
Unit #19103 (1 Bdrm)	Sunset West	Sunset West - Vacation Resort, Village 1, Lodge & Spa HOA, Bldgs, Bldg 19, Floor 1, Unit #19103 (1 Bdrm)	Fullmer	Not Occupied

As of this sprint, you can view Occupied Status and Name. The additional columns will be filled, when the Reservation Import is complete.

## Work Order Management

### Active/Follow-Up, Correct Grouping

We have corrected an issue in which Assignees were being separately grouped by Last Name and shift-status. When the screen is set to group by Assignee, it will now group as-expected.

### Notifications, Exclude Future Work Orders

By customer request, we have enhanced the Work Order notifications to exclude future work orders. For example, if a user has a Notification configured to work orders that remain unassigned for more than 15 minutes, the system will only consider work orders that are expected to start now or earlier.

### PM, Increase Max Recurrence

By customer request, we have enhanced Preventive Maintenance work orders to support 10-year recurrence.

### Import, Usability Enhancements

Last sprint, we introduced a Standard Work Order Import with Billings capability, for the first time. We have enhanced the import spreadsheet and functions, based on customer feedback. Enhancements include improved usability of the work order spreadsheet and utility of column headers, and support for Staff Name.

### Standard Work Orders, Enhance to Support Pre-Populated Task Notes

We have enhanced the Model Task template to include Notes that are automatically added to the desktop Work Order create process. This functionality optionally allows each task to be set-up with unique instructions or questions that are highly editable by the customer organization.

Some sample use cases include, Front Desk processes in which the agent asks the guest/customer questions or provides troubleshooting information, to reduce rework or unnecessary work by Engineering. For example, providing the guest with verbal instructions for operating a DVD player.

Another possible utility of this would be to add notes to generally flag an assignee working on a certain type of work (repairs to appliances, etc.) to look into an available warranty.

## Billing

### Work Order Billing by Unit Report

The Work Order Billing by Unit report is available from Billing Search > Reports. We were alerted to an issue with the report not showing the correct combination of items, based on the user filters. The report now displays, as the user would expect.

### Active Billings, Enhance to Include Billable Actions

By customer request, we have enhanced the Active Billings screen to include a list of all Billable Actions associated with the Billing. This information can help to quickly identify items with greater or fewer Billable Actions than desired, duplicates, or general review.

Site	Billing ID	Date of Work	Last Assignee	Status	Bill To	Charge	Description	WO Billed Actions
Sunset West	WO:42777	8/21/2017 4:10...	Alfred, Frank	Needs Approval	Owner of Unit -	\$0.00	Repair Dishwasher - Leaking	Repaired Dishwasher - Leaking
Sunset West	WO:42012	5/16/2017 5:29...	Tree, Denise	Ready to Bill	Owner of Unit -	\$60.00	Repair TV / Television - Damaged	Installed / Reinstalled TV / Television
Sunset West	WO:41872	5/2/2017 5:20 AM	Bertram, CORP_Nathan	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:41956	6/7/2017 9:45 AM	Tesco, Lisa	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42162	6/12/2017 5:47...	Davis, Diana	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42164	6/13/2017 1:48...	Beddingfield, James	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42176	6/15/2017 8:01...	Bullock, Sandra	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42139	6/15/2017 8:02...	Kurka, Winston	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42662	7/13/2017 1:22...	Davis, Diana	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42693	8/1/2017 12:35...	Wales, George	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42740	8/1/2017 12:37...	Wales, George	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42764	8/17/2017 1:02...	Bullock, Sandra	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42808	8/21/2017 3:55...	Aldrich, Candace	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:42779	8/21/2017 4:27...	Morales, Leece	Needs Approval	Owner of Unit -	\$0.00	AC Repair - Closet Leak	Inspected for Minor Water Leak
Sunset West	WO:41954	5/23/2017 9:52...	Hoover, John E	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood
Sunset West	WO:41955	5/23/2017 11:11...	Kurka, Marit	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood
Sunset West	WO:41953	6/1/2017 4:22 PM	Kurka, Marit	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood
Sunset West	WO:42131	6/7/2017 9:40 AM	Tesco, Lisa	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood
Sunset West	WO:42163	6/13/2017 3:47...	Hoover, John E	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood
Sunset West	WO:42173	6/15/2017 7:49...	Kurka, Marit	Needs Approval	Owner of Unit -	\$0.00	911 Emergency - Flooding	Inspected for Major Water Leak / Flood

### Billings, Revert Approval

We have added a convenience feature to revert the current approval state on a Billing. If you are using two-step approvals, only one level is reverted at a time.

Site	Billing ID	Date of Work	Last Assignee	Status	Bill To
Sunset West	WO:42777	8/21/2017 4:10...	Alfred, Frank	Needs Approval	Owner of Unit -
Sunset West	WO:42012	5/16/2017 5:29...	Tree, Denise	Ready to Bill	Owner of Unit -

This functionality is available on the Active Billings screen, as well as the Work Order > Associated Billings tab.

## 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.

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](mailto:support@katanasoft.com).

## **Enhancements this sprint:**

### **Location Enhancements**

The Reservation and Occupied Status enhancements, noted on Page 3, will enable Cleans to be prioritized by outgoing/incoming Reservations.

### **Active Cleans, Add Phase and Building**

By customer request, we have added additional location segments to the Active Cleans screen. These options are especially helpful in determining next assignment.

### **Cleans Import, Usability Enhancements**

Based on User Acceptance Testing feedback, we have enhanced the Cleans Import process for stability.