

## Category-Specific Actions Taken

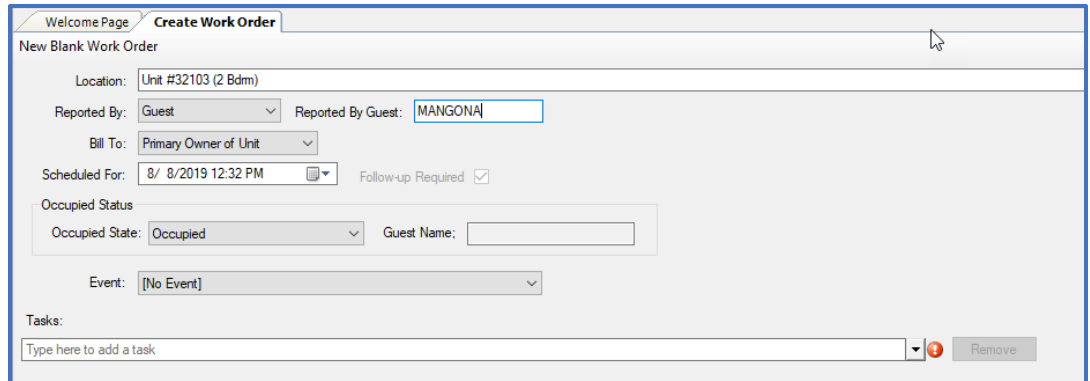
*Actions Taken are a site-specific work order functionality designed to close the loop between what a guest requests/reports and the work that is actually completed, especially for tasks that require specialized knowledge.*

*Actions Taken can be configured for all Work Order Types, or limited by Category. This Job Aide addresses the use of Category-Specific Actions Taken. In this set-up, the user is prompted to enter an "Action Taken" on the configured work order tasks during work order completion.*

*Model Tasks within the associated categories are simplified so that the dispatcher does not need to guess what the guest's issue may be.*

For assistance with Actions Taken, please contact [support@katanasoft.com](mailto:support@katanasoft.com).

**Step 1:** Open the Create Work Orders screen and complete the Location, Reporter, and Scheduled For fields.

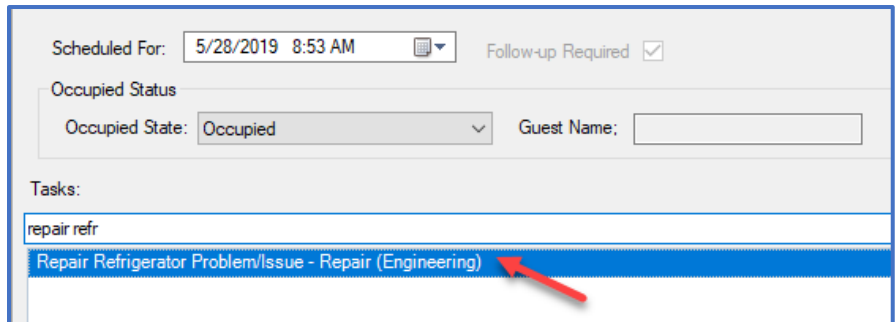


The screenshot shows the 'Create Work Order' form with the following fields filled: Location: Unit #32103 (2 Bdm), Reported By: Guest, Reported By Guest: MANGONIA, Bill To: Primary Owner of Unit, Scheduled For: 8/ 8/2019 12:32 PM, Follow-up Required: checked, Occupied State: Occupied, Guest Name: (empty), Event: [No Event].

**Step 2:** In the Task field, type the keyword of the issue.

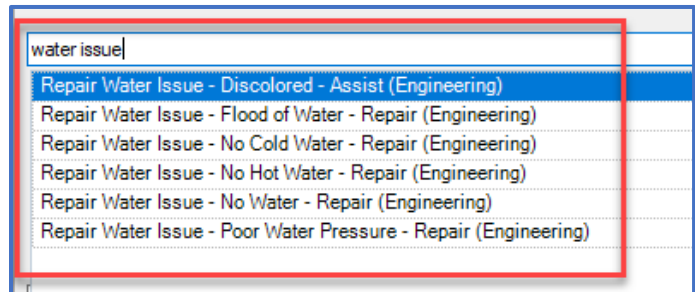


Note: When selecting a task that is associated with Actions Taken, there will be only one generic Model Task to select in that category.



The screenshot shows the 'Tasks' field with the text 'repair refr' entered. A dropdown menu is open, showing a list of tasks. The first task, 'Repair Refrigerator Problem/Issue - Repair (Engineering)', is highlighted in blue and has a red arrow pointing to it.

When selecting a task that is *not* associated with Actions Taken, multiple tasks may be available. Select the appropriate task and Tab.



The screenshot shows a dropdown menu for the task 'water issue'. The menu is open, displaying a list of six options, all starting with 'Repair Water Issue -'. The first option, 'Repair Water Issue - Discolored - Assist (Engineering)', is highlighted in blue.

**Step 5:** This work order now has three tasks, two associated with Actions Taken. It is important to enter “Notes” to capture more specific details about the generic tasks to give the responding department insight into the guest-reported issue(s).

Occupied State: Occupied Guest Name: [ ]

Tasks:

- Repair Refrigerator Problem/Issue - Repair (Engineering) [Remove]
  - Priority: High
  - Sublocation: [ ]
  - Notes: Guest reports door won't stay closed
  - Assign To: [Nobody]
  - Action Taken Model Task
- Repair Toilet - Repair (Engineering) [Remove]
  - Priority: High
  - Sublocation: [ ]
  - Notes: Guest's baby filled toilet with toilet paper
  - Assign To: [Nobody]
  - Action Taken Model Task
- Repair Water Issue - No Hot Water - Repair (Engineering) [Remove]
  - Priority: High
  - Standard Model Task

Create Workorder(s) Clear



Note: The “Actions Taken” for the tasks will be entered by the Assignee when they are completing the Work Order on AsgardMobile.

**Step 6:** To complete the Work Order, open the Active Work Orders screen, double-click on the Work Order or highlight the Work Order and click the **Complete** button.

Welcome Page **Active Work Orders/Follow-Up**

View Assign/Reassign Unassign Start **Complete** Cancel  Show Future Items  Show Suspended

Select Location Filter Clear Location Filter

Drag a column header here to group by that column

| Aging   | ID    | Location       | Work Requested                  |
|---------|-------|----------------|---------------------------------|
| OVERDUE | 29636 | #1211 (Master) | Assist with Adjusting Bed (M... |
| OVERDUE | 29637 | #2203 (Master) | Deliver Rubbermaid Storage ...  |
| OVERDUE | 29638 | #3303 (Master) | Change Mattress - Too Soft      |

When the Complete Work Order screen opens, calculate the completion time. Then select an Action Taken from the drop-down for the required fields.

For the task that is not associated with Actions Taken, the field can be left blank.

Complete Work Order

Actual Start and Completion:

Started:  Calculate 5/28/2019 at 9:15 AM

Duration:  Calculate Days: 0 Hours: 0 Minutes: 1

Completed:  Calculate 5/28/2019 at 9:16 AM

This work order is being backdated (set Expected Start to Actual Start)

Comment: [ ]

Action Taken on each Task

| Task                              | Action Taken |
|-----------------------------------|--------------|
| Repair Refrigerator Problem/Issue | [ ]          |
| Repair Screen Door - Broken       | [ ]          |
| Repair Toilet                     | [ ]          |

Drop-down menu for Action Taken:

- Clogged Toilet
- Guest Knowledge
- Loose Handle
- Other ( Mandatory to Add Comment)
- Repair/Replace Cover
- Replace/Repair Caulk Base
- Replace/Repair Push Button
- Replace/Repair Toilet Paper Holder

**Step 7:** Click OK to complete the work order and save the Actions.

| Task                              | Action Taken              |
|-----------------------------------|---------------------------|
| Repair Refrigerator Problem/Issue | Replace/Repair Light Bulb |
| Repair Screen Door - Broken       |                           |
| Repair Toilet                     | Clogged Toilet            |

OK Cancel



To view the completed work order with its Actions Taken, open the Work Order Details screen.

Request: Repair Refrigerator Problem/Issue, Repair Screen Door - Broken, Repair Toilet  
 Location: #3210 (Guest Villa)  
 Reported By: Guest | Reported By Guest: MANGONA  
 Type: Repair (Engineering) | Priority: High | Follow-up Required  
 Occupied Status: Occupied | Guest Name:   
 Description:   
 Entered by Lisa Amsdorf on 5/28/2019 9:15 AM  
 Follow-Up Action Taken:  On: 5/28/2019 9:25 AM

Tasks (3/3) | Costs | Comments (0) | Journal Entries | Log | Notifications

| # | Completed                           | Name                              | Action Taken              | Category      | Summary | Notes |
|---|-------------------------------------|-----------------------------------|---------------------------|---------------|---------|-------|
| 1 | <input checked="" type="checkbox"/> | Repair Refrigerator Problem/Issue | Replace/Repair Light Bulb | Refrigerators |         |       |
| 2 | <input checked="" type="checkbox"/> | Repair Screen Door - Broken       |                           | Door          |         |       |
| 3 | <input checked="" type="checkbox"/> | Repair Toilet                     | Clogged Toilet            | Toilets       |         |       |