## 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.

A	Scenario: 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.
	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 <a href="mailto:support@katanasoft.com">support@katanasoft.com</a> .
	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.
	The weighting for Inspection templates may be changed at the Organization level for core tasks, and at the site level for flex tasks.



Step 1	Open the Organization menu, select Master Templates, then choose whether you want to view/edit PM or Inspection templates.						
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	You can edit any of this information by updating the relevant fields on the screen.		
Step 5	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. Wetcome Page Manage Inspection Master Templates Guest Suite Inspection* Nome: Guest Suite Inspection Type: Guest Suite Inspection Days Unit Overde: Information Days (Week: AppBage Manage Days) Days Unit Overde: Information Days: Information Day		
Reminder!	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. If you need to make immediate changes to your program (including active work orders), please contact <u>support@katanasoft.com</u> for assistance.		