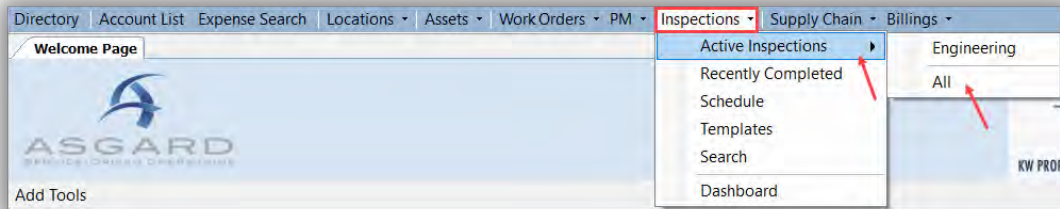
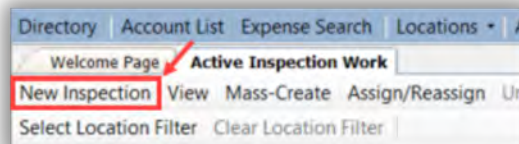




Step 1: From the Inspections dropdown menu, select **Active Inspections** for your department.



Step 2: Click **New Inspection** to create an Inspection Work Order for **ONE** location.



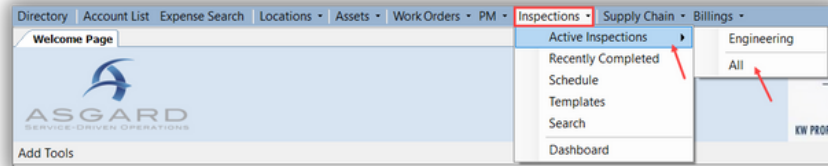
Step 3: When the New Inspection dialog window opens, enter the Inspection details.

- 1: Enter the **Location** being inspected or where the Inspection is taking place
- 2: Use the drop-down to select the **Inspection Template**
- 3: If you are inspecting the work of an individual, choose their name from the **Inspecting Work Of** drop-down
- 4: **Scheduled For** - This defaults to when you open the screen but can be adjusted for a future scheduled Inspection

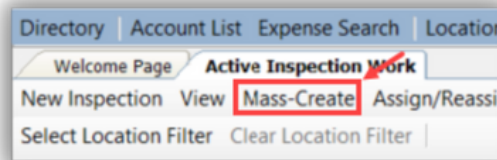
Then click OK



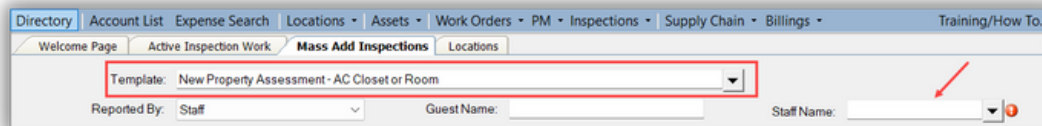
Step 1: From the Inspections dropdown menu, select **Active Inspections** for your department.



Step 2: Click **Mass-Create** to create Inspection Work Orders for **MORE THAN ONE** location.



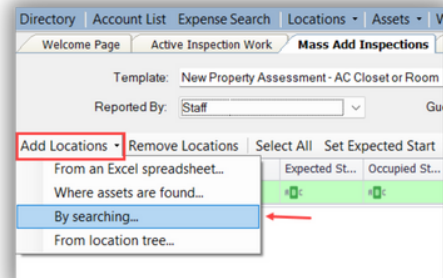
Step 3: When the Mass Add Inspections screen opens, select a **Template** and the name of the person creating the Inspection Work Orders.



Step 4: Click the **Add Locations** button and use **By searching...** to locate and select the Locations where the Inspections need to be completed.



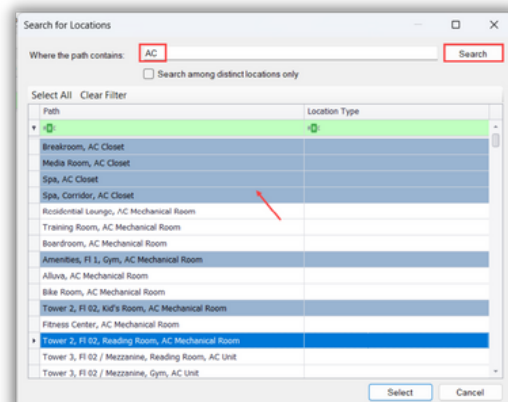
The Mass-Create function is limited to 25 work orders at a time. If you need to create a larger number of scheduled or unscheduled Inspections, please contact support@katanasoft.com



Step 5: To search for an area, zone, residences or location type, enter the search criteria into **"Where the path contains"** field.

To select residences, enter #. To search for a specific area, enter the name and click "Search".

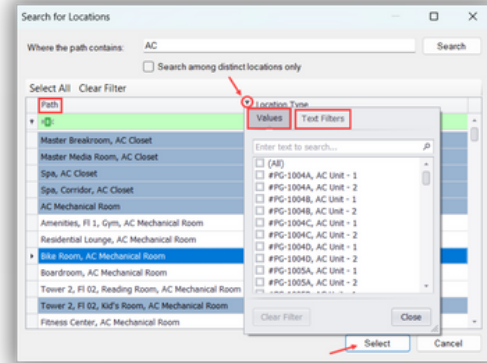
- Use **"Select All"** to select all locations.
- To select specific locations, hold down the **control key** while using your mouse to select the preferred locations.



You can also sort by clicking on the Column headers. **Path** column sorts locations numerically or alphabetically. **Location Type** sorts by grouping.

Notice if you hover over any column header a little funnel appears on the right for advance filtering. The dialog box opens to **Values** and you can select one or more. Open the **Text Filter** tab for more filtering options.

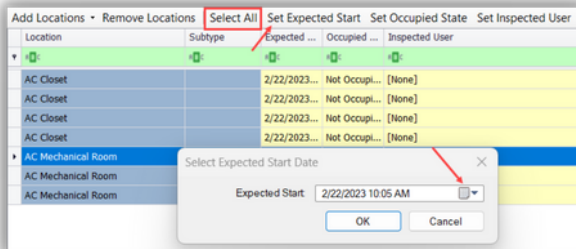
Once your location selection is complete, click **"Select"**.



Step 6: The locations will populate on the **"Mass Add Inspections"** screen. To remove a location, highlight and click the **"Remove Locations"** button.

Add Locations	Remove Locations	Select All	Set Expected Start	Set Occupied State	Set Inspected User
Location	Subtype	Expected ...	Occupied ...	Inspected User	
AC Closet		2/22/2023...	Not Occup...	[None]	
AC Closet		2/22/2023...	Not Occup...	[None]	
AC Closet		2/22/2023...	Not Occup...	[None]	
AC Closet		2/22/2023...	Not Occup...	[None]	
AC Mechanical Room		2/22/2023...	Not Occup...	[None]	
AC Mechanical Room		2/22/2023...	Not Occup...	[None]	
AC Mechanical Room		2/22/2023...	Not Occup...	[None]	

Step 7: You can modify the **Expected Start**, **Occupied State** and **Inspected User** for each of these locations by mass editing or individually.

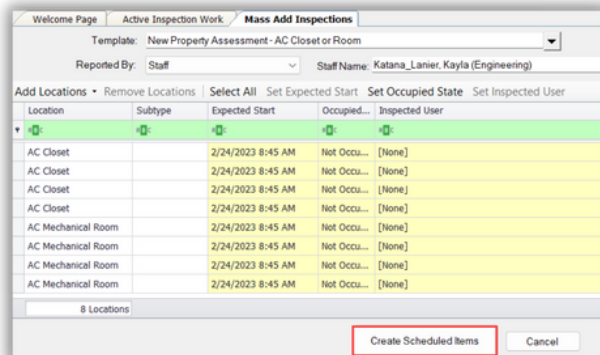


For instance, if you need all these inspections to start tomorrow at 8:00am, click **"Select All"**, then **"Set Expected Start"**, change the date/time to tomorrow at 8:00am and click **OK**.

Select All	Set Expected Start	Set Occupied State
Subtype	Expected Start	Occupied State
	2/22/2023 10:05 AM	Not Occupied
	2/22/2023 10:05 AM	Not Occupied
	2/22/2023 10:05 AM	Not Occupied

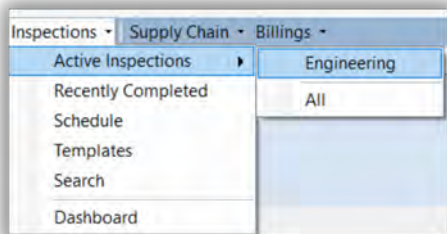
To change an individual location's Expected Start, highlight that location and use the **"Set Expected Start"** button or click the dropdown arrow in the Expected Start column to update the date and time for that location.

Step 8: Once you have set the expected start times, click **Create Scheduled Items**.

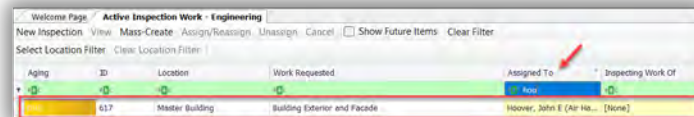




Step 1: To complete an Inspection on the Desktop. Open the Active Inspections screen for your department.

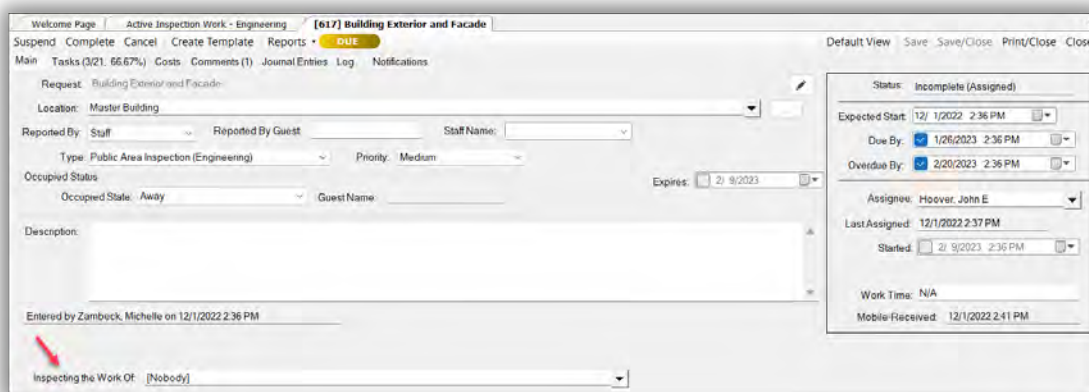


Step 2: Use filter bar to filter for the Assigned inspection you wish to complete. Double click the inspection to open the detail screen.



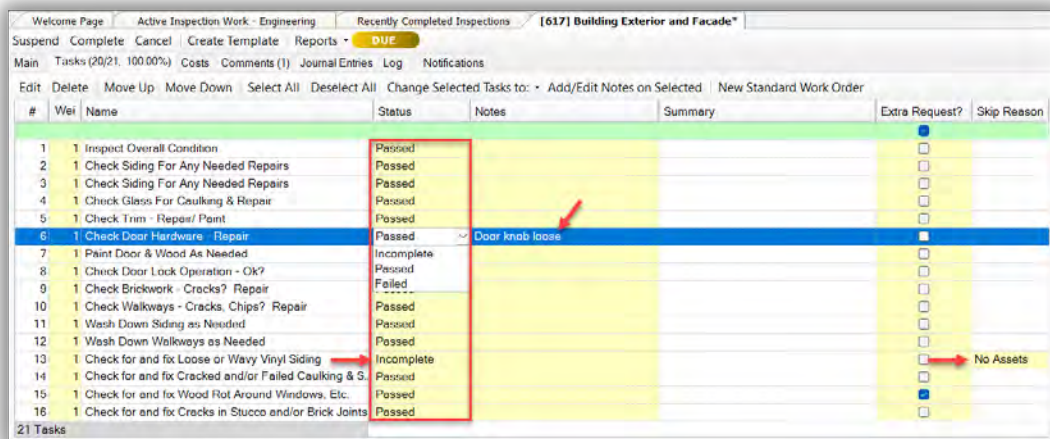
Step 3: From this screen use the convenience tools to update the results of the inspection.

Inspecting the Work Of field is where you can add the name of the person whose work you are inspecting. If you are inspecting the quality of a location it will show as **Nobody**.

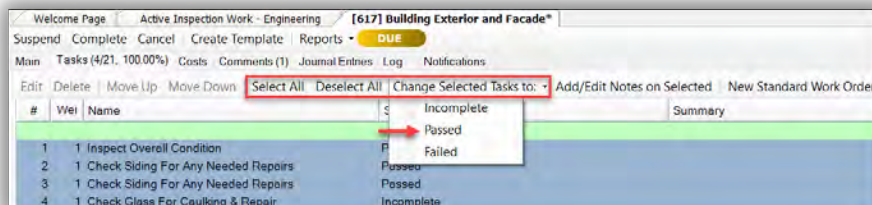


Step 4: Your organization may have decided to default all task to *Passed*. Update the status of any **Incomplete** or **Failed** tasks by using the dropdown arrow in the status column.

If a task **Fails**, add the failed reason to the **Note** field.
If a task is marked **Incomplete** add the **Skip Reason** in the proper column.



If all tasks are defaulted to *Incomplete* use the **Select All** button, move two buttons to the right, click the **Change Selected Tasks to:** button, and select **Passed**. Update the status of any *Incomplete* or *Failed* tasks by using the drop-down arrow.



Step 5: New Standard Work Order button creates a work order with the Location and Reporter pre-populated. It also notes that the work order was created from this inspection for tracking and reporting purposes.

The screenshot shows the 'Active Inspection Work - Engineering' window for '[617] Building Exterior and Facade*'. The 'Main' tab is active, displaying a table of tasks. The 'New Standard Work Order' button is highlighted in a red box. The table has columns: #, Wei, Name, Status, Notes, Summary, Extra Request?, and Skip Reason. The tasks listed are:

#	Wei	Name	Status	Notes	Summary	Extra Request?	Skip Reason
1	1	Inspect Overall Condition	Passed			☐	
2	1	Check Siding For Any Needed Repairs	Passed			☐	
3	1	Check Siding For Any Needed Repairs	Passed			☐	

Step 6: Comments/Photos can be added on the Comments tab, by clicking the **New Comment** button.

The screenshot shows the 'Comments' tab for '[617] Building Exterior and Facade*'. The 'New Comment' button is highlighted in a red box. A red arrow points to the 'New Comment' button. A red speech bubble with the text 'A comment is required.' is visible next to the 'New Comment' button.

! Make sure that the photo is saved to your desktop. Click **Browse** to locate the photo within your files.

Step 7: Once all data has been added, click the **Complete** button.

The screenshot shows the 'Active Inspection Work - Engineering' window for '[617] Building Exterior and Facade*'. The 'Complete' button is highlighted in a red box. The 'Main' tab is active, displaying a table of tasks. The table has columns: #, Wei, Name, Status, and Notes.

Step 8: Update the **Complete Work Order** dialog box with two of the three parameters - Start time/date, Duration, or Completed time/date. The third parameter will be calculated by the system.

Step 9: Click **OK** to complete the work order.

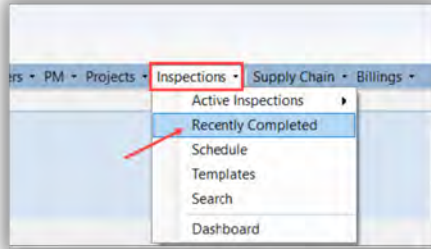
The screenshot shows the 'Complete Work Order' dialog box. The 'Actual Start and Completion' section is active. The 'Started' field is set to 2/9/2023 at 2:50 PM. The 'Duration' field is set to 0 Days, 0 Hours, and 0 Minutes. The 'Completed' field is set to 2/9/2023 at 2:50 PM. The 'OK' button is highlighted in a red box.

Step 10: Click **Save/Close**.

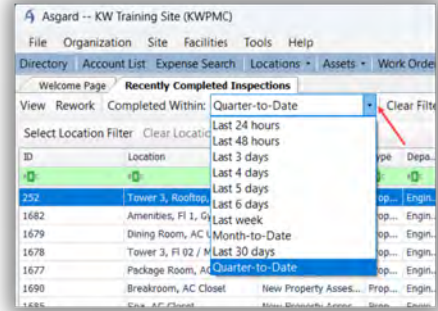
The screenshot shows the 'Active Inspection Work - Engineering' window for '[617] Building Exterior and Facade*'. The 'Save/Close' button is highlighted in a red box. The 'Main' tab is active, displaying a table of tasks. The table has columns: #, Wei, Name, Status, and Notes.



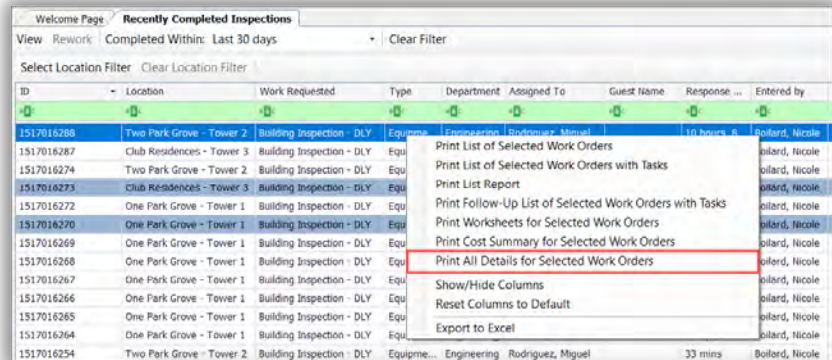
Step 1: Click the **Inspections** tab, Click **Recently Completed**



Step 2: Use the drop-down menu to select a time frame



Step 3: To view more details for Recently Completed Inspections, highlight the Inspection (s) that you want to view, **Right-Click**, and select **Print All Details for Selected Work Orders**.



A **Print Preview** will open a new window for ease of **reviewing** or **sharing** with the Inspectee, *if applicable*, for training and self-improvement opportunities.

Scroll to view:

- All Tasks
- Failed Task notes
- Comments and/or Photos



Any **Notes** associated with a task will appear below the task name in **bold font**

Park Grove

Master Building Inspection (Weekday) - DLY

Reported By: Staff
Guest Name:
Staff Name:
Location: Tower 1

Entered: 2/14/2023 8:46 PM Entered By: Tree, Denise
Inspectee:

Follow-Up Required: No Event:

Tasks Score 87.50%

Pool Pump Room

1 Pool Temp (Indicate Temp in Note)
Temp:
2 Jacuzzi Temp (Indicate Temp in Note)
Temp: 88

3 There are No Leaks
4 Heaters are Working Properly
Fire Pump Room
5 No Alarms
6 There are No Leaks
Generator Room
7 Check for Leaks: Fuel or Oil
8 Tuesdays Check at Startup for a smooth start
Main Electrical Room/ Switch Gear Room
9 HVAC is Working Properly
10 No Smells
11 Room is Free of Debris (Nothing Blocking Panels)
Lobby
12 Check all HVAC Equipment Operating Properly
Fitness Center
13 Inspect Equipment to Ensure Operating Properly

W/O #2097

Status: Complete

Type: Building Inspection
Department: Engineering
Priority: High
Assigned To: Katana, Lanier, Kayla
Expected Start: 2/20/2023 12:00 AM
Due On: 2/21/2023
Overdue On: 2/21/2023 12:00 AM
Started: 2/21/2023 8:00 AM
Completed: 2/21/2023 8:00 AM
Expiration: 2/21/2023 8:00 PM

16 Temp is between 50-60 Degrees (Indicate Temp in Note)
Temp:

Comments

Date	User	Comment
2/8/2023	Rodriguez, Miguel	VFD 1 open loop

Park Grove

Building Inspection - DLY

Reported By: Staff
Guest Name:
Staff Name:
Location: One Park Grove - Tower 1

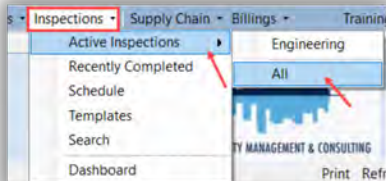
W/O #1517016269

Status: Complete

Type: Equipment Inspection
Department: Engineering
Priority: High
Assigned To: Delgado, Jose
Expected Start: 2/7/2023 8:00 AM
Due On: 2/8/2023

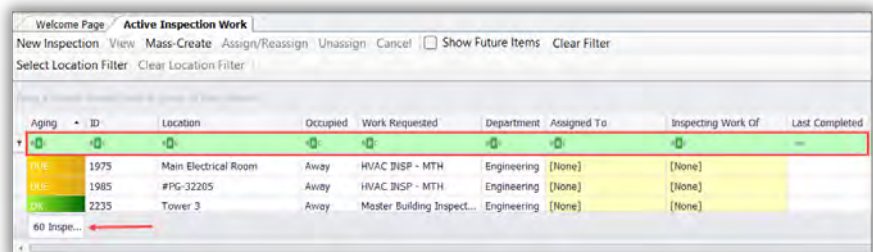


Step 1: Open the Active Inspection drop-down from the Inspection tab. Select a Department.



Step 2: The Active Inspections screen contains all of the active Inspections that have been generated for your site by the system at the beginning of the period in which they should be completed.

- The bottom left-hand corner gives you the total Inspections.
- The different columns provide information at a glance that will help you manage your Inspections.
- Use the green filter bar to narrow the data for a column (for example filter for all Building Inspections that need to be completed).



Step 3: The two most important columns provide you with critical information that enables you to decide the best course of action when prioritizing and assigning your Inspection work.

- **Last Completed** column gives you the date that the Inspection work order was last completed at that location.
- **Days Since Last Completed** column is the actual number of days since the work was completed at that location.

Aging	ID	Location	Work Requested	Department	Assigned To	Inspecting Work Of	Last Completed	Days Since Last Completed
DUE	1975	Main Electrical Room	Away	HVAC INSP - MTH	Engineering	[None]	[None]	
DUE	1985	#PG-32205	Away	HVAC INSP - MTH	Engineering	[None]	[None]	
DUE	2235	Tower 3	Away	Master Building Inspect...	Engineering	[None]	[None]	

Step 4: Clicking on **Days Since Last Completed** sorts the Inspections up and down numerically, listing the location with the longest time since it was last completed.

Last Completed	Days Since Last Completed
11/2/2022	116
11/3/2022	115
2/5/2023	21
2/6/2023	20
2/7/2023	19
2/7/2023	19
2/7/2023	19
2/7/2023	19

Step 5: Clicking on the **Location** column groups the locations together, allowing you to consolidate the work and assign several Inspections to be completed by the same person.

Location	Work Requested
Tower 1	Building Inspection (Weekday)- DLY
Tower 1	Master Building Inspection (Weekday) - DLY
Tower 1	HVAC INSP - MTH
Tower 1	AC Unit Annual Maintenance
Tower 1, Fl 02, Gym, AC Unit	New Property Assessment - AC Closet or Room
Tower 1, Fl 02, Kid's Room, AC Unit	New Property Assessment - AC Closet or Room



Step 1: Highlight the Inspection you are interested in and click **View Matrix** in the upper right-hand corner of the screen.

Ag...	ID	Location	Occupied	Work Requested	Department	Assigned To	Inspecting Work Of	Entered by	Last Completed
ONE	4461	#PG-32208	Away	HVAC INSP - MTH	Engineering	[None]	[None]	Tree, Denise	5/3/2023
ONE	4477	Training Room	Away	HVAC INSP - MTH	Engineering	[None]	[None]	Tree, Denise	5/3/2023
ONE	4479	Main Electrical Room	Away	HVAC INSP - MTH	Engineering	[None]	[None]	Tree, Denise	3/16/2023
ONE	4470	Fire Control Room	Away	HVAC INSP - MTH	Engineering	[None]	[None]	Tree, Denise	3/16/2023
ONE	4464	Boardroom & Business Center	Away	HVAC INSP - MTH	Engineering	[None]	[None]	Tree, Denise	3/25/2023

Step 2: The Matrix shows a complete status view of the highlighted PM for all locations. Check the **Show Last Completion Date** box to see the last date the Inspection was completed at each location.

Inspection Matrix - HVAC INSP - MTH			
#PG-32205 Last completed on 6/12/2023 Score 100.00%	#PG-32206 Last completed on 6/6/2023 Score 100.00%	#PG-32208 Last completed on 5/3/2023 Score 100.00%	#PG-3PH02 Last completed on 6/5/2023 Score 100.00%
#PG-3PH03 Last completed on 3/16/2023	#PG-3PH05 Last completed on 3/16/2023	#PG-3PH06 Last completed on 3/16/2023	#PG-3PH08 Last completed on 3/14/2023
Allura Last completed on 2/24/2023	Amenities Last completed on 6/10/2023 Score 100.00%	Boardroom & Business Center Last completed on 3/25/2023	Evapco Cooling Tower - 2 Last completed on 6/15/2023 Score 100.00%
Fire Control Room Last completed on 3/16/2023	Fitness Center Last completed on 6/28/2023 Score 100.00%	Lobby / Back of House Last completed on 4/13/2023	Main Electrical Room Last completed on 3/16/2023
Master Building Last completed on 3/14/2023	Tower 1 Last completed on 6/15/2023 Score 85.71%	Tower 2 Last completed on 6/27/2023 Score 100.00%	Tower 3 Last completed on 6/2/2023 Score 100.00%
Tower 3, Fl 02 / Mezzanine, Gym Last completed on 2/23/2023 Score 100.00%	Training Room Last completed on 5/3/2023 Score 100.00%		

Step 3: The colors give you additional information. The **Color Key** and percentage of the completion rate are at the bottom of the page.

Inspection Matrix - HVAC INSP - MTH			
#PG-32205 Last completed on 6/12/2023 Score 100.00%	#PG-32206 Last completed on 6/6/2023 Score 100.00%	#PG-32208 Last completed on 5/3/2023 Score 100.00%	#PG-3PH02 Last completed on 6/5/2023 Score 100.00%
#PG-3PH03 Last completed on 3/16/2023	#PG-3PH05 Last completed on 3/16/2023	#PG-3PH06 Last completed on 3/16/2023	#PG-3PH08 Last completed on 3/14/2023
Allura Last completed on 2/24/2023	Amenities Last completed on 6/10/2023 Score 100.00%	Boardroom & Business Center Last completed on 3/25/2023	Evapco Cooling Tower - 2 Last completed on 6/15/2023 Score 100.00%
Fire Control Room Last completed on 3/16/2023	Fitness Center Last completed on 6/28/2023 Score 100.00%	Lobby / Back of House Last completed on 4/13/2023	Main Electrical Room Last completed on 3/16/2023
Master Building Last completed on 3/14/2023	Tower 1 Last completed on 6/15/2023 Score 85.71%	Tower 2 Last completed on 6/27/2023 Score 100.00%	Tower 3 Last completed on 6/2/2023 Score 100.00%
Tower 3, Fl 02 / Mezzanine, Gym Last completed on 2/23/2023 Score 100.00%	Training Room Last completed on 5/3/2023 Score 100.00%		
22 Items 9 (40.91%) Complete (Green) 0 (0.00%) Superseded (Blue) 13 (59.09%) Incomplete (Yellow and Red) 0 (0.00%) Unsuccessful and Not Planned (Orange)			

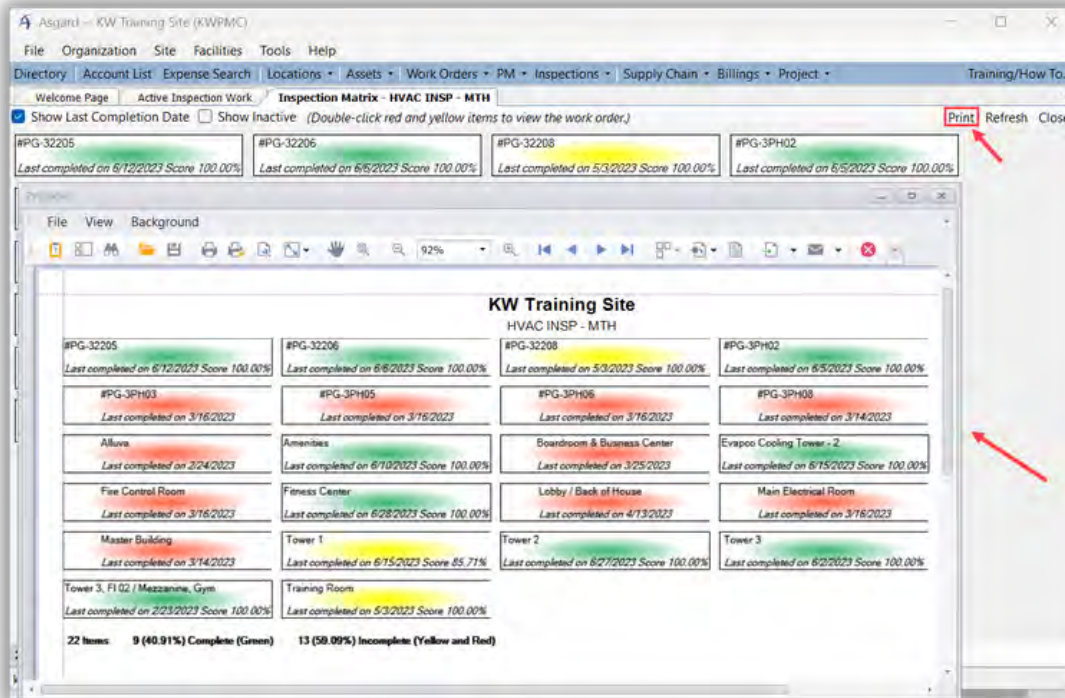
GREEN – Inspection completed this period (QTR/ANN/MTH etc.)

YELLOW – Inspection completed last period but has not yet been completed this period

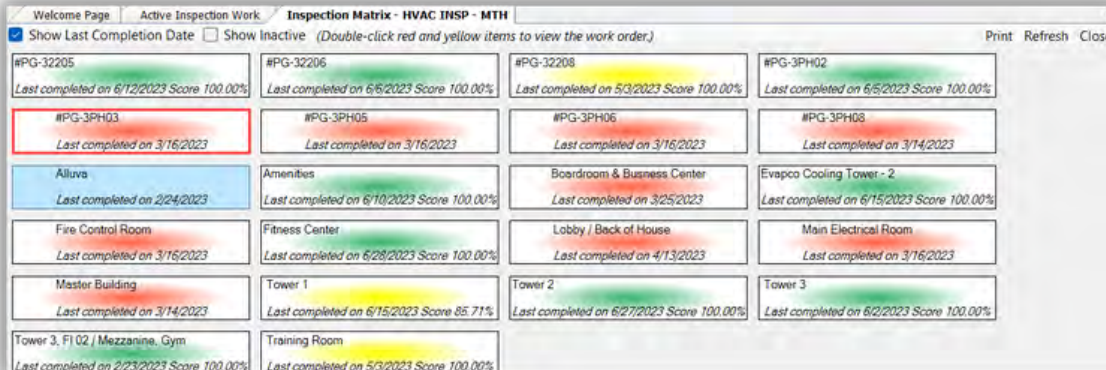
RED – Inspection not completed for at least the last two periods

ORANGE – Indicates a location is out of service or unavailable

Step 4: To print the Matrix, click the Print button in the right-hand corner. The Print Preview will open in a new window.



Step 5: You can view and assign incomplete Inspections from the Matrix. Double click on a yellow or red location to open the Inspection.



Use the Assignee field on the right-hand side of the screen to assign the Inspection.

