

Asgard Desktop View or Edit Organization PM and Inspection Templates

The needs of your Preventive Maintenance or Inspection programs may change from time to time. To reflect those changing needs, you may wish to edit your organization-level program templates. This process is designed to be easy and flexible.



Step 2: When the Manage Master Templates screen opens, you will see a list of available templates.

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Name	Department	Туре	Reoccurs	Expires	Priority	No Flex Tasks	Hierarchical	# Templa	æs
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Air Handler QTR	Engineering	Water Safety (INSP)	4 Times a Year on Any Day	0 Days Before Next Occurrence	Critical		Air Handlers		1
Building Domestic Multi-Area Zones Hot Water	Engineering	Water Safety Reading (Insp)	Every Week on Any Day	0 Days Before Next Occurrence	Critical				1
Cooling Towers BIANN	Engineering	Water Safety (INSP)	Twice a Year on Any Day	0 Days Before Next Occurrence	Critical				0
Cooling Towers DLY	Engineering	Water Safety Reading (Insp)	Every Week on M, W and F	0 Days Before Next Occurrence	Critical				1
Cooling Towers WKLY	Engineering	Water Safety Reading (Insp)	Every Week on Any Day	0 Days Before Next Occurrence	Critical				1
Decorative Water Feature BIANN	Engineering	Water Safety (INSP)	Twice a Year on Any Day	0 Days Before Next Occurrence	Critical				1
Decorative Water Feature DLY	Engineering	Water Safety Reading (Insp)	Every Week on M, W and F	0 Days Before Next Occurrence	Critical				1

The Organization-Level Master Templates are passed down to site-level templates and arranged at the site to generate active PMs and Inspections. Each work order contains Core Tasks, the primary tasks outlined in the Organization-Level Master Template. Additionally, Flex Tasks, and optional tasks, can be included specifically at the site level.

Inspection templates can be prioritized at the Organization level for core tasks and at the site level for flex tasks.

Step 3: Open the template you would like to view/edit, by double-clicking the template in the grid. Or, you can highlight the template and then click the **Edit** button.

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	Building Domestic Multi-Area Zones Hot	Water Engineering	Water Safety Reading (Insp)	Every Week on Any Day	0 Days Before Next Occurrence	Critical			
	Cooling Towers BIANN	Engineering	Water Safety (INSP)	Twice a Year on Any Day	0 Days Before Next Occurrence	Critical			
	Cooling Towers DLY	Engineering	Water Safety Reading (Insp)	Every Week on M, W and F	0 Days Before Next Occurrence	Critical			
	Cooling Towers WKLY Engineering		Water Safety Reading (Insp)	Every Week on Any Day	0 Days Before Next Occurrence	Critical			

Step 4: The template will launch on a new screen, which includes all of the details about the PMs or Inspections generated from the template, including 1. Reoccurrence Rate, 2. Due/Overdue Limits, 3. Flex Tasks (if allowed), and 4. Tasks that are included.

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	Priority: Critical	Hierarchical Group:	Air Handlers	~	
Type: 4 Times a Year	·	· .		✓	
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Tasks on Inheriting Templates					
Description. Change air filter and add biocide tab to condensate pan. The filter is required to be dated (written on the side of the filter.					
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Step 5: Click on Save or Save/Close at the top right of the screen to finalize your changes. Welcome Page Locations Manage Inspection Master Templates Air Handler QTR* Save Save/Close Close Name: Air Handler QTR

 Name: Air Handler QUR

 Type:
 Water Safety (INSP) (Engineering)

 Priority:
 Critical
 Image: Critical Group:
 Air Handlers
 Reoccurrence Type:
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 V Task Passed Default Incomplete Days Until Due: 14 🗘 Days Until Overdue: 21 🗘 Spanning: 0 🜩 days Work Orders Expire: Days Before Next Occurrence V Expiration Days: Generate Work Orders 2 days in advance, scheduled to appear on expected date. Disallow Flex Tasks on Inheriting Templates Description: Change air filter and add biocide tab to condensate pan. The filter is required to be dated (written on the side of the filter • Default Billable Action: None Tasks Log New Edit Delete Import Top Ten Tasks Move Up Move Down Weight Name Description Summary Model Task # 1 1 Air filter replaced and dated? In the main location itself ٠. Air Handler - Required ... 1 Biocide tab added to condensate tab? In the main location itself Air Handler - Required 2 2 Tasks When a template is updated, the changes will flow through to the site-level templates. They 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 support@asgardsoftware.com for assistance.