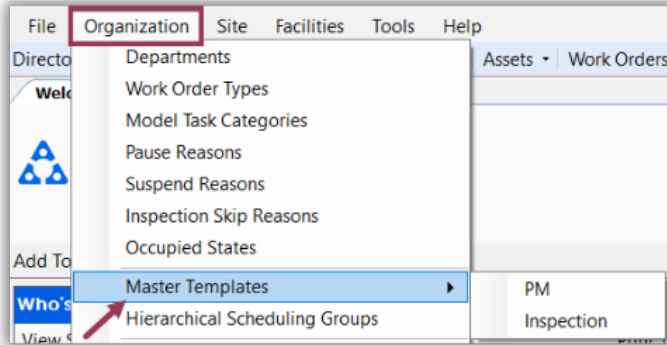**asgard**
Learning Portal

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 1: Open the Organization menu, select **Master Templates**, then choose whether you want to view/edit PM or Inspection templates.

You need administrator-level permissions to update templates. Contact support@asgardsoftware.com if you believe you should have this access.

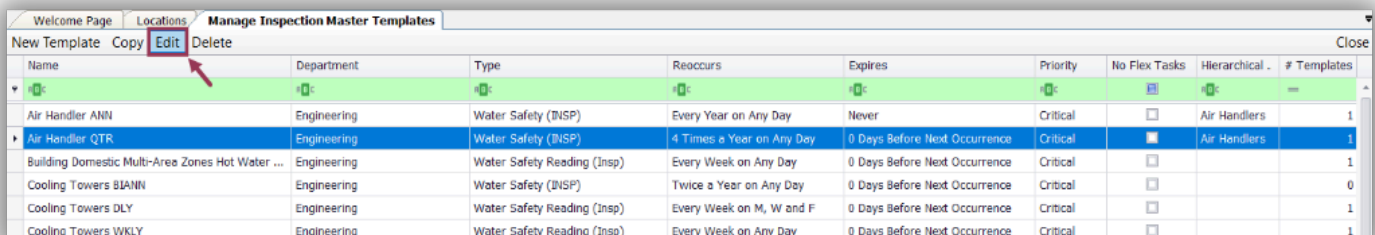**Step 2:** When the Manage Master Templates screen opens, you will see a list of available templates.

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.

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.

You can edit any of this information by updating the relevant fields on the screen.

Step 5: Click on **Save** or **Save/Close** at the top right of the screen to finalize your changes.

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.