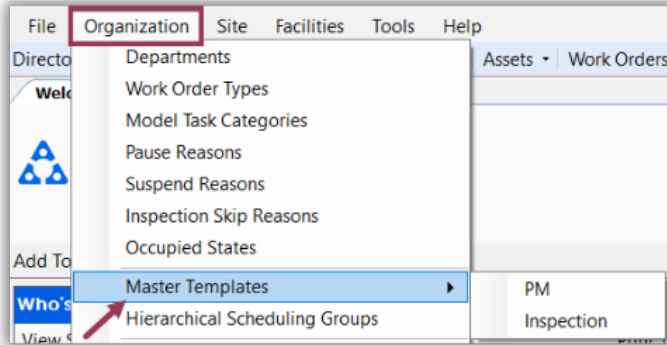


The needs of your Preventive Maintenance or Inspection programs may change from time to time. To reflect those changing needs, you may wish to edit your organization-level program templates. This process is designed to be easy and flexible.

**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](mailto:support@asgardsoftware.com) if you believe you should have this access.

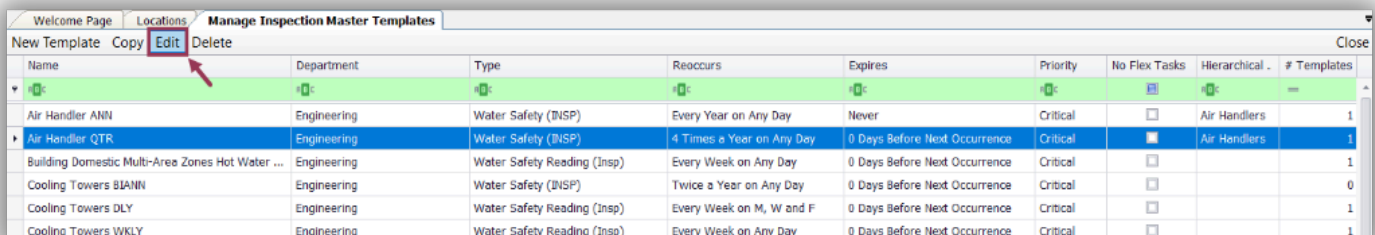
**Step 2:** When the Manage Master Templates screen opens, you will see a list of available templates.

Name	Department	Type	Reoccurs	Expires	Priority	No Flex Tasks	Hierarchical ...	# Templates
Air Handler ANN	Engineering	Water Safety (BNSP)	Every Year on Any Day	Never	Critical	<input type="checkbox"/>	Air Handlers	1
Air Handler QTR	Engineering	Water Safety (BNSP)	4 Times a Year on Any Day	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>	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	<input type="checkbox"/>		1
Cooling Towers BIANN	Engineering	Water Safety (BNSP)	Twice a Year on Any Day	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>		0
Cooling Towers DLY	Engineering	Water Safety Reading (Insp)	Every Week on M, W and F	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>		1
Cooling Towers WKLY	Engineering	Water Safety Reading (Insp)	Every Week on Any Day	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>		1
Decorative Water Feature BIANN	Engineering	Water Safety (BNSP)	Twice a Year on Any Day	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>		1
Decorative Water Feature DLY	Engineering	Water Safety Reading (Insp)	Every Week on M, W and F	0 Days Before Next Occurrence	Critical	<input type="checkbox"/>		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.



The screenshot shows the same table as in Step 2, but with the 'Edit' button in the top toolbar highlighted by a red arrow. The 'Air Handler QTR' row is also highlighted in blue.

**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. Recurrence Rate**, **2. Due/Overdue Limits**, **3. Flex Tasks** (if allowed), and **4. Tasks** that are included.

1 Recurrence Type: 4 Times a Year Day of Week: Any Day Task Passed Default: Incomplete

2 Days Until Due: 14 Days Until Overdue: 21 Spanning: 0 days

3  Disallow Flex Tasks on Inheriting Templates

4 Default Billable Action: None

#	Weight	Name	Description	Summary	Model Task
1	1	1 Air filter replaced and dated?		In the main location itself	Air Handler - Required ...
2	1	1 Biocide tab added to condensate tab?		In the main location itself	Air Handler - Required ...

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.

Save Save/Close Close

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](mailto:support@asgardsoftware.com) for assistance.