**Chateau Customization Protocol**

|  |  |  |
| --- | --- | --- |
|  | Copy over preferences from existing Chateau Database? | Yes  No |
|  | Database Name | Enter database name |

|  |  |  |
| --- | --- | --- |
|  | Do you want your technicians to be able to add new repair attempt values to the AttemptHow picklist in Chateau Mobile? | Yes  No |

|  |  |  |
| --- | --- | --- |
|  | **InspectionWhy Picklist Customization**  Do you want to remove any of these inspection reasons from the InspectionWhy picklist? (Can be copied over from existing databases)  For a full description of each item, see the Knowledge Base > Inspections and Attempts > [InspectionWhy](https://help.ldartools.com/?knowledgebase=understanding-inspectionwhym21-or-avo). |  |
| **Least Likely to Remove** | |
| Field Find |  |
| Requested |  |
| AVO Confirmation |  |
| OEL Confirmation |  |
| After ReAct (After reactivation) |  |
| Late (Monitor Late) |  |
| PRVRelease (After PRV release) |  |
| ConfirmPurge (Confirming a line purge) |  |
| ConfirmWeld (Confirming a weld) |  |
| **Less Likely to Remove** | |
| OpenFlange (Confirming reseal after opening) |  |
| OpenSeal (Confirming reseal after opening) |  |
| OpenThreads (Confirming reseal after opening) |  |
| PRVDelay (Delayed PRV Release Check) |  |
| DORTrial (Trial insp. does not create a leak) |  |
| **OGI-Related** | |
| Failed Picture Audit |  |
| Optical Gas Image |  |
| OGIConfCovComp (Confirm Result on a Reportable Comp) |  |
| **If You Have UTMs** | |
| UTM Confirm |  |
| UTMNow (UTM safe to monitor “now”) |  |
| **Most Likely to Remove** | |
| Sensor Failure |  |
| Barrier Failure |  |
| Drift Fail High ReCheck |  |
| Drift Fail Low ReCheck |  |
| **Most Likely to Remove (cont.)** | |
| Random |  |
| VolNonReportable (Voluntary Non-Reportable) |  |
| DORDelayedReT (DOR Delayed ReTest) |  |
| CmpMonAudit (Comparative Monitoring Audit) |  |
| CmpMonConf (Comparative Monitoring Confirmation) |  |
| CVSMaintenance |  |
| DistInspAudit (California District Audit Inspection) |  |
| MaintReq (Maintenance Request) |  |
| NonCovRpt (Non-Covered Component w/ Reportable PPM) |  |
| NonCovVol (Non-Covered Component Not Reportable PPM) |  |
| Survey |  |
| VolReportable (Voluntary Reportable) |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Do you want to turn on the Work Performed feature of your database? | | Yes  No |
|  |  | |  |
|  | How long do you want us to look back for DeActivated Components? | | Enter duration |
|  |  | |  |
|  | How long do you want to store Inspection records? | | Enter duration |
|  |  | |  |
|  | Do you want to store Process Units in addition to Location Unit (LUnits) for each component? | | Yes  No |
|  |  | |  |
|  | Do you want to make Process Unit a Required Field? | | Yes  No |
|  |  | |  |
|  | Will you be using Chateau to help manage AVOs (sometimes referred to as “Visuals”)?  Please select one of the following: | | |
|  |  | We will record AVO Events (or leaks) when they occur. | |
|  |  | We will schedule AVO inspections to be performed (such as Weekly AVO inspections pumps or Annual AVO on CVS components. | |
|  |  | We want to do both: Track AVO Events (leaks) *AND* schedule AVO Inspections. | |
|  |  | We do not want to track or schedule any AVO activities. | |

|  |  |  |
| --- | --- | --- |
|  | **Special Component Status (Please provide the following to support@ldartools.com)**   * 1. The list of “quarterly DTMs,” if you have any.   2. The list of components you have on DOR status, if you have any.   3. The current Month1 or Month2 status of any MMQ components you have.   4. Which months you have your mmQ inspections scheduled for in which LUnits, if you have a preference.   5. Any special scheduling preferences you have for Annual Components. | |
|  |  |  |

1. Which Detector Types will you be using?

|  |  |  |  |
| --- | --- | --- | --- |
| PID |  | Camera |  |
| Freon |  | Chl |  |
| Other |  | FID |  |
| HCL (Hydrogen Chloride) |  | PID10\_8 |  |
| PID11\_6 |  | CGI |  |

**People**

In the table on pg. 4, provide the name and email address of who will work in Chateau or Chateau Mobile. Mark which roles will apply to each person.

* + **Owner:** Can edit roles and assign people to the database. Owner does not automatically qualify for all other Roles. Please enter which additional roles apply for this person.
  + **Chateau Access:** Can log into Chateau.
  + **Technician:** Can be assigned tours (routes) and are in the technician list Chateau Mobile uses to synchronize with Chateau.
  + **Processor:** Can record component property changes in Chateau and Chateau Mobile.
  + **Suggester:** Can suggest property changes in Chateau and Chateau Mobile. Suggesters appear in the list of suggesters, and then a processor can select. If the processor is also a suggestor, then their account is used as both a processor and suggestor by default..
  + **Approver:** Can approve any suggestions made in Chateau and Chateau Mobile. They can also auto-approve any component property change they make themselves.
  + **Alerts Management:** Has the ability to turn on and off audits for the Owner's Porch as well as adding and removing emails and users from Audits. In addition, this role controls editing and adding new leak alerts, adding and removing emails from Leak Alerts.
  + **Delete Inspections and Repair Attempts:** Allows user to delete inspections and repair attempts.
  + **Emissions Management:** Has the ability to edit, delete, and add emissions models.
  + **Leaks/DOR Management**: This role allows the user to edit and close leaks and DORs.
  + **Picklists and Resources Management:** This role allows the user to add and hide values in all picklists, as well as add and edit values in Resources/ LUnit, Streams, Chemicals, and Cooling Tower Tools.
  + **Rules Management:** Has the abilities to add new rules, change rule assignments, edit new rules, and unapply rules. In addition, this role controls edits and additions to the Quick Repair module.

|  |  |  |
| --- | --- | --- |
|  | Will you have any Contractor employees who will have management rights over your database? | Yes  No |
|  | If so, please specify: Enter specifications | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Email | Owner | Chateau Access | Tech | Processor | Suggester | Approver | Alerts Mgmt. | Delete Inspections, Repair Attempts | Emissions Mgmt. | Leaks/  DOR Mgmt. | Picklists/  Resources Mgmt. | Rules Mgmt. |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Who can add new users to the Chateau system for your company? (We will use this list to populate your Can Add Users Security Group.) | | | |  |
|  |  | | | |  |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |

**Single Sign on**

See the prerequisite here: [Signing in with SSO](https://help.ldartools.com/index/chateau-help/gettingstarted/signing-in-with-sso/)

Will Single Sign On be set up for this database? Yes  No

**Form Completion Record**

In the table below, provide the name of each person who completed this form, and the date of completion.

|  |  |
| --- | --- |
| Name | Date of Completion |
| Name | Select date |
| Name | Select date |
| Name | Select date |
| Name | Select date |
| Name | Select date |