**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 Attempt How values to the AttemptHow picklist in Chateau Mobile? | Yes [ ]  No [ ]  |

|  |  |  |
| --- | --- | --- |
|  | **InspectionWhy Picklist Customization**Do you want to remove any of these 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 |[ ]
|  | Late |[ ]
|  | PRVRelease |[ ]
|  | ConfirmPurge |[ ]
|  | ConfirmWeld |[ ]
|  | **Less Likely to Remove** |
|  | OpenFlange |[ ]
|  | OpenSeal |[ ]
|  | OpenThreads |[ ]
|  | PRVDelay |[ ]
|  | DORTrial |[ ]
|  | **OGI-Related** |
|  | Failed Picture Audit |[ ]
|  | Optical Gas Image |[ ]
|  | OGIConfCovComp |[ ]
|  | **If You Have UTMs** |
|  | UTM Confirm |[ ]
|  | UTMNow |[ ]
|  | **Most Likely to Remove** |
|  | Sensor Failure |[ ]
|  | Barrier Failure |[ ]
|  | Drift Fail High ReCheck |[ ]
|  | Drift Fail Low ReCheck |[ ]
|  | **Most Likely to Remove (cont.)** |
|  | Random |[ ]
|  | VolNonReportable |[ ]
|  | DORDelayedReT |[ ]
|  | CmpMonAudit |[ ]
|  | CmpMonConf |[ ]
|  | CVSMaintenance |[ ]
|  | DistInspAudit |[ ]
|  | MaintReq |[ ]
|  | NonCovRpt |[ ]
|  | NonCovVol |[ ]
|  | Survey |[ ]
|  | VolReportable |[ ]

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| --- | --- | --- |
|  | What regulations will you be applying? | Enter regulations |

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| --- | --- |
|  | **General Component Status**Please indicate which of the following lists you will be providing and email them to support@ldartools.com.  |
|  |[ ]  If you have a preference for which month your MMQ components are done… |
|  |  | Enter Property/month preference; press “Enter” for multiple entries |
|  |[ ]  Month of the year you want certain Annual Components inspected |
|  |  | Enter Property/month preference; press “Enter” for multiple entries |

1. Which Detector Types will you be using?

|  |  |
| --- | --- |
| PID |[ ]  Camera |[ ]
| Freon |[ ]  Chl |[ ]
| Other |[ ]  FID |[ ]
| HCL |[ ]  PID10\_8 |[ ]
| PID11\_6 |[ ]  CGI |[ ]
|  |  |  |  |

1. **People**

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.
	+ **Builder:** Can edit rules and static data in Chateau.
	+ **User:** Can log into Chateau.
	+ **Technician:** Can be assigned tours and are in the technician list Chateau Mobile uses to synchronize with Chateau.
	+ **Processor:** Can process suggested edits and suggested new components off the MOC Porch and New Component Porch.
	+ **Suggester:** Can suggest property changes in Chateau and Chateau Mobile. Suggesters appear in the list of suggesters the processor can select. If the processor is also a suggester, then their account is used as both the processor and suggester by default.
	+ **Approver:** Can approve MOC suggestions made in Chateau and Chateau Mobile. They can also auto-approve any component property change they make.
	+ **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 Picklists in Settings/Picklists, as well as add and edit values in Resources/ LUnit, Streams, Chemicals, and Cooling Tower Tools.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Email | Owner | Builder | User | Tech | Processor | Suggester | Approver | Leaks/DOR | Picklists/Resources |
| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
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| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
| Name | Email |[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

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|  | Who can add new users (Please add the Owners, if applicable) |  |
|  |  |  |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |
| Name | Email |

If you are not using Security Groups and want us to do it, please provide any details we will need.

|  |
| --- |
| Enter details |

 If you do want to use Security Groups, then we will assist you at this step of the process.

**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 |