**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 |  |

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

|  |  |  |
| --- | --- | --- |
|  | **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 |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |
| Name | Email |  |  |  |  |  |  |  |  |  |
| 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 |