**Chateau Setup Protocol**

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

1. Mapping Considerations
   1. If you are using a LeakDAS database, how are you currently using the Compliance Field?
   2. When creating properties, do you approve of spelling the Property out rather than using abbreviations (Connector rather than CONECT)?
   3. When creating properties, do you prefer all caps or upper and lower case?

(Valve vs VALVE)?

When creating the Component Types do you approve of using the Sub and SubSubType for describing Connectors?

|  |  |  |
| --- | --- | --- |
| Type | SubType | SubSubType |
| Connector | Flange | Orifice |
|  |  | Blind |
|  |  | Manway |
|  |  | Valve End |
| Connector | Threaded | Tee |
|  |  | Reducer |
|  |  | Union |
| Connector | Tube Fitting |  |

Etc.

|  |  |
| --- | --- |
|  | **InspectionWhy Picklist Customization**  Do you want to remove any of the inspection reasons (listed on pg. 2) 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).  (Chateau is designed to enable you to track the REASON you perform each M21 Inspection. It supports 35+ options. In order to keep your list as short as possible, please tell us which ones you would like for us to REMOVE) |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **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 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 |
|  |  | |  |
|  | Considering the data that you will supply to us, 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?  (See [What is a Location Unit (LUnit)?](https://help.ldartools.com/index/chateau-help/lunits/what-is-a-location-unit-lunit/) for more details) | | 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 |  |

1. What regulations, permits or consent decrees is your facility subject to? (e.g., VVa, HON, Reg 5, GGGa, BWON, etc.)

Enter regulations/permits/consent decrees

1. Please indicate, for each of these items, which is true:

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **None** | **Will vary from**  **Rule to Rule** | **Do this to all of them:**  **(Annual, Exempt, etc.)** |
| NDE |  |  | Enter preference |
| CVS |  |  | Enter preference |
| Vacuum |  |  | Enter preference |
| Insulation |  |  | Enter preference |
| Heavy Liquid |  |  | Enter preference |
| 5-day repair on PRV in GV |  |  | Enter preference |
| Skips Provisions |  |  | Enter preference |

1. Applying Rules to Components.

Chateau is designed to apply the appropriate Rule(s) to each component automatically. This means you will never have to manually assign a Rule (or Rules) to any component and that there is no risk of ever assigning the wrong Rule.

This is done by defining the Rule Assignment Criteria for each Rule. Chateau allows you to define these criteria for any Property or any string of Properties, for example:

* Rule 1 Assigned to all Components in the Database.
* Rule 2 Assigned to any Component in ALKY LUnit.
* Rule 3 Assigned to all Components NOT in Reformer Unit.
* Rule 4 Assigned to any Component on Line # 32-234 and #45-333.
* Rule 5 Assigned to any Components in the Tank Farm AND on Tank 32.
* Rule 6 Assigned to any PRV in Gas/Vapor service on Vessel 45.

If your database does not allow this process (i.e., the necessary properties are not available in your database), we can still assign Rules manually, but we will work to help you avoid this.

Enter Rule Assignment Criteria

1. **People**

In the table on pg. 6, 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.

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| --- | --- | --- |
|  | 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 |  |  |  |  |  |  |  |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
|  | 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 |