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# TMA Product Roadmap: WebTMA and Beyond

Joe McVay, Product Manager



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## Joe McVay

Product Manager

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Joe rejoined TMA Systems in January as the Product Manager, responsible for gathering feedback from our customers and developing the Product Roadmap. Joe has over 10 years of experience in the CMMS industry, including 7 years as a Senior Implementation Consultant for TMA. He has worked primarily with customers in Higher Education, Government, Healthcare, and Manufacturing throughout his career.



# Overview

1. Product Roadmap Vision
2. Platform API and Integration Strategy
3. Recently Released Features
4. Upcoming Feature Releases
5. 2023 Focus Areas





# Product Roadmap Vision

Our roadmap reflects what we've been hearing from our customers:

01

## "More flexible and scalable"

With extensive development on Platform APIs we will support complex integrations with other software platforms your organization relies on.

02

## "Better views of spatial data and better analytics"

Our customers manage spaces from a room level all the way to city blocks. We will provide interactive views of this spatial data from floorplans to GIS maps.

The solutions we are working on will deliver robust reporting that provides actionable insights to your organization. We will offer a complete package of graphical reporting and analytics.

03

## "Secure and high-performing SaaS environment"

With our move to Microsoft® Azure we can offer a secure and high performing cloud hosting environment with reliable disaster recovery.



# Agile Methodology

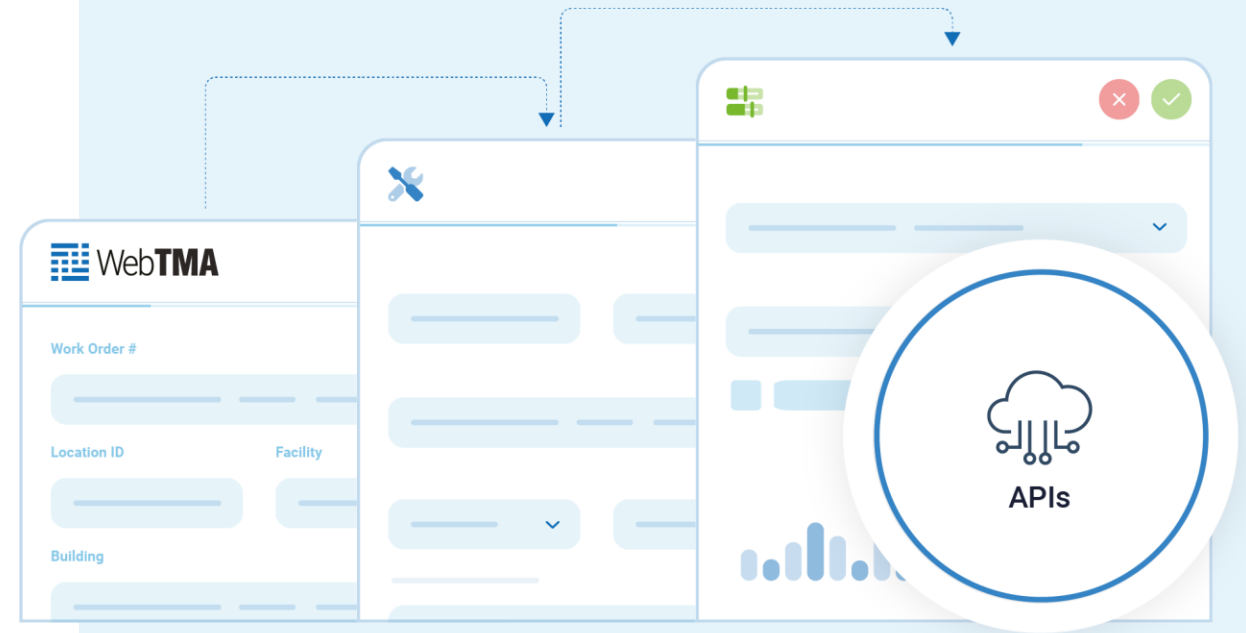
“Agile is an iterative approach to project management and software development that helps teams deliver value to their customers faster and with fewer headaches. Instead of betting everything on a "big bang" launch, an agile team delivers work in small, but consumable, increments. Requirements, plans, and results are evaluated continuously so teams have a natural mechanism for responding to change quickly.”

*<https://www.atlassian.com/agile>*



# Platform API

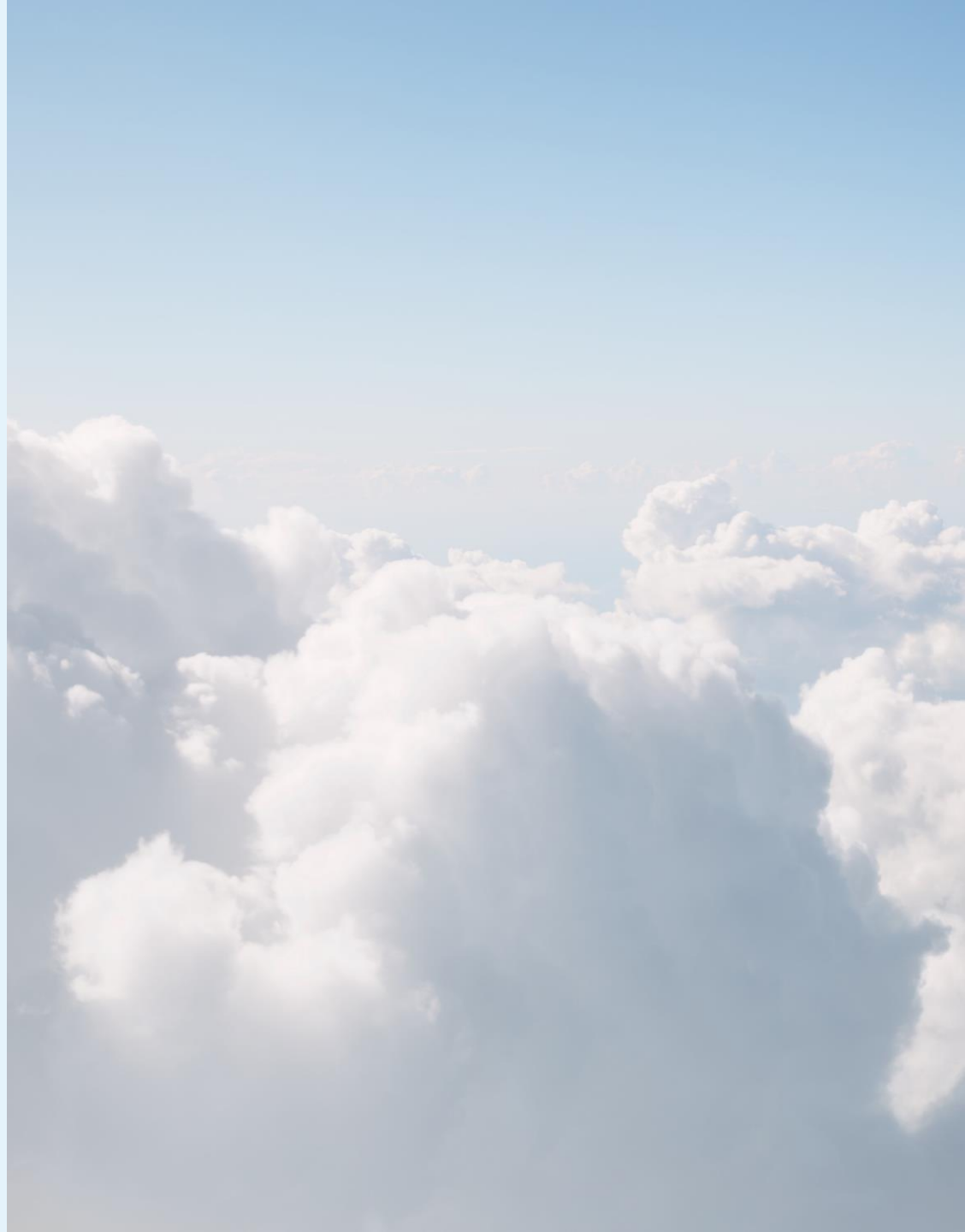
TMA has begun the process of developing a full suite of APIs to ensure clients can integrate easily with any of their many other systems. Whether it is IoT devices or your ERP system, TMA will publish APIs that will allow customers either develop their own integrations or work with us as partners. This development is ongoing and many of the features shared here are considered part of this effort.



# Microsoft® Azure

TMA is committed to providing a best-in-class SaaS hosting environment to our customers. We have begun work on the production environment in Microsoft Azure and plan to make it available to all hosted customers in **Q4 2022**.

- 99.9% uptime
- Top tier security and compliance via Azure
- TMA support to relieve in-house IT resources
- 4x faster fixes and automatic updates
- Replicated database for reporting and better system performance
- Implemented performance monitoring software for both the application and database
- Connectors for customers to bring a reporting tool of their own



# Recently Released New Features





# GIS – First Offering With More To Come

We released the following basic features related to GIS in September of this year. We are continuing development to connect ArcGIS to WebTMA 7:

01

GIS Map View of maintenance worthy items and Work Orders embedded within WebTMA

02

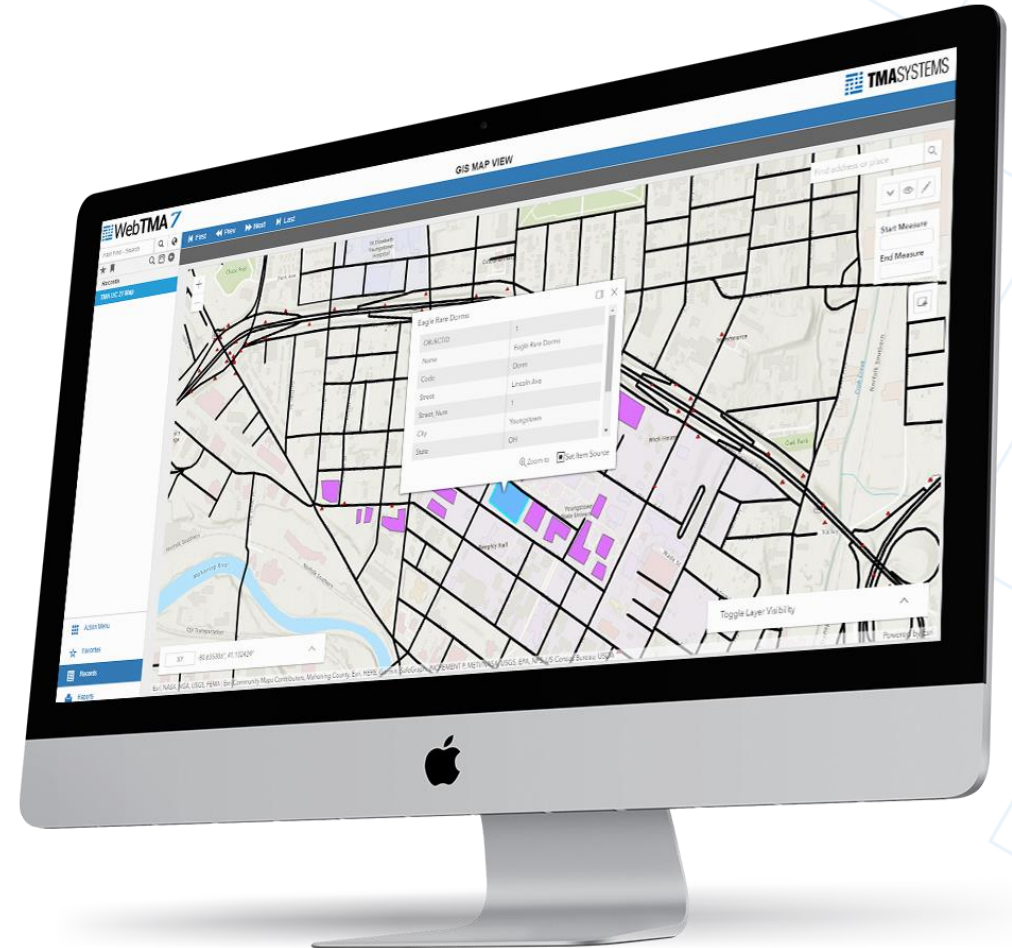
Standard Basemap overlays including street map views as well as satellite imagery

03

Zoom to records directly from your map view

04

Link to map views within TMA from item or work order records



# Work Request API

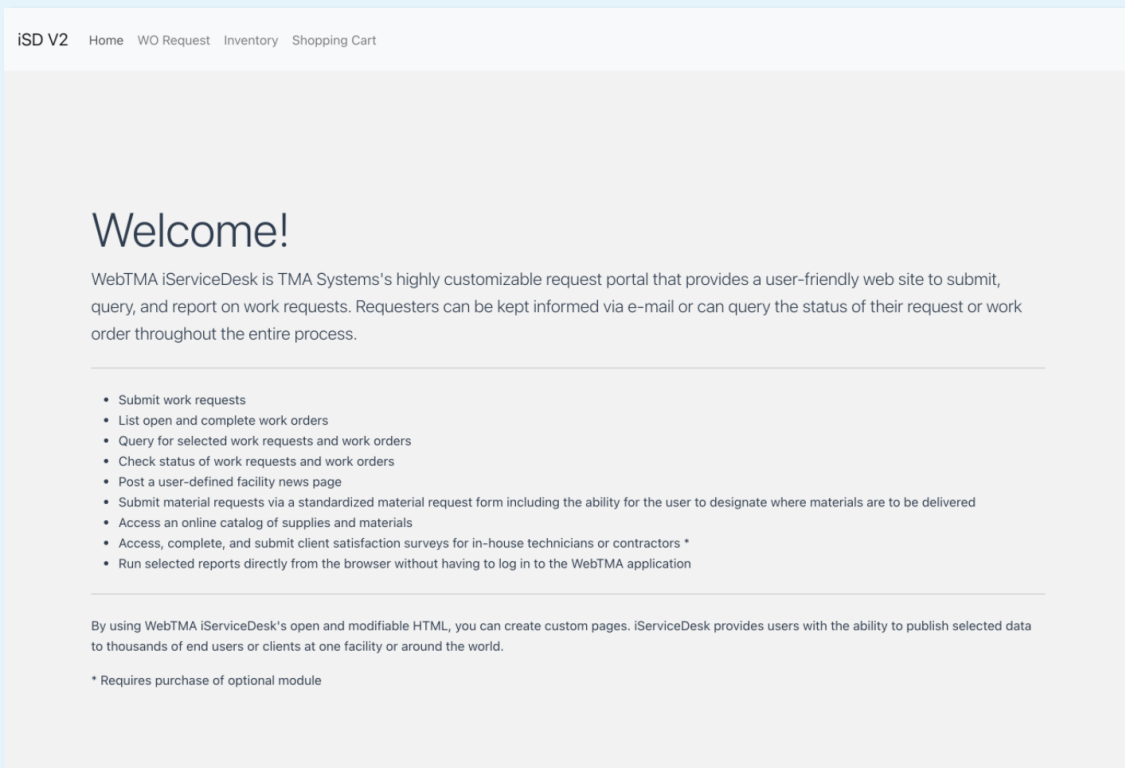
While the development work for a complete API set will continue well into 2023, API endpoints for the creation of Work Requests were released in **September of 2022**. This API offering will give clients more flexibility and security than our previous offerings. Whether you're a university looking to completely brand your work request screens and workflows, or a hospital looking to create work requests from Environment of Care rounds, this interface will serve your needs.

- Create your own or partner with TMA to develop a fully customized Work Request Portal
- Utilize these endpoints to integrate with your Environment of Care Systems
- Trigger work requests from BAS systems or IoT devices
- Pull location / item information from WebTMA for use in other systems



# WebTMA's Configurable Features

## Welcome page for your branding and messaging



The screenshot shows the 'Welcome!' page of the iSD V2 application. At the top is a navigation bar with links: Home, WO Request, Inventory, and Shopping Cart. The main content area features a large 'Welcome!' heading, followed by a paragraph describing the portal's purpose. Below this is a bulleted list of features. At the bottom, there is a note about customizability and a footnote regarding an optional module.

iSD V2 Home WO Request Inventory Shopping Cart

## Welcome!

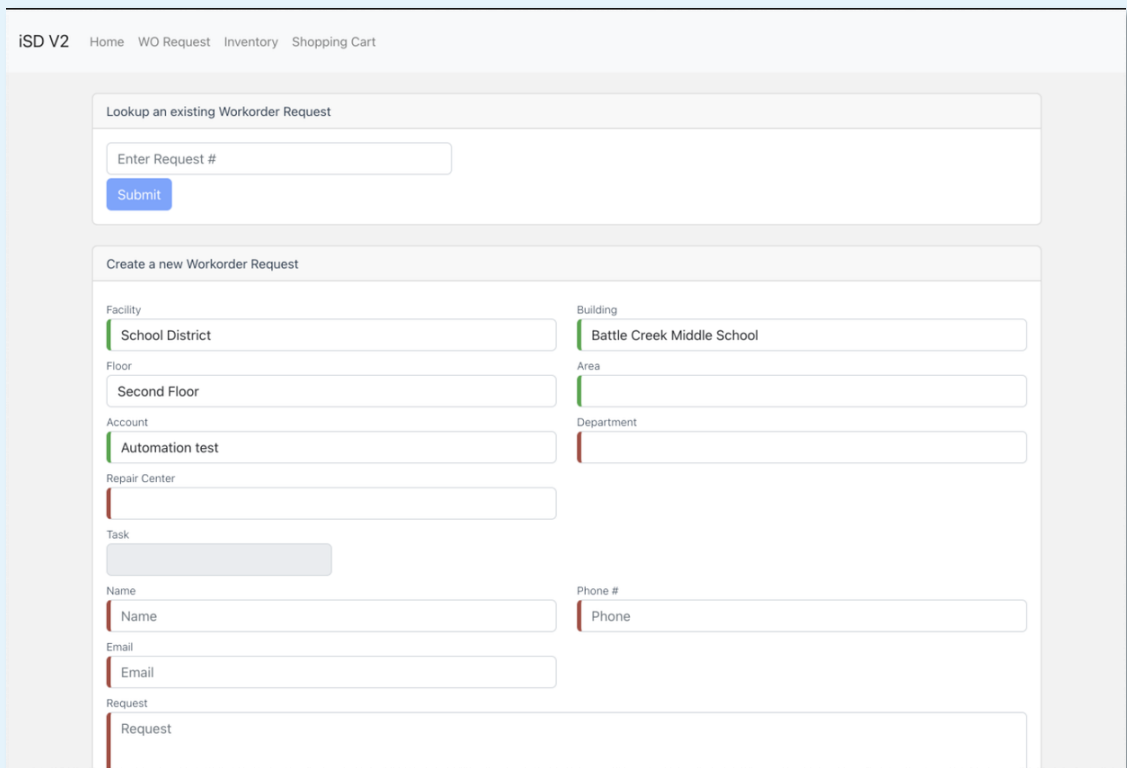
WebTMA iServiceDesk is TMA Systems's highly customizable request portal that provides a user-friendly web site to submit, query, and report on work requests. Requesters can be kept informed via e-mail or can query the status of their request or work order throughout the entire process.

- Submit work requests
- List open and complete work orders
- Query for selected work requests and work orders
- Check status of work requests and work orders
- Post a user-defined facility news page
- Submit material requests via a standardized material request form including the ability for the user to designate where materials are to be delivered
- Access an online catalog of supplies and materials
- Access, complete, and submit client satisfaction surveys for in-house technicians or contractors \*
- Run selected reports directly from the browser without having to log in to the WebTMA application

By using WebTMA iServiceDesk's open and modifiable HTML, you can create custom pages. iServiceDesk provides users with the ability to publish selected data to thousands of end users or clients at one facility or around the world.

\* Requires purchase of optional module

## Modern looking request page with total configurability for adding/requiring fields



The screenshot shows the 'Create a new Workorder Request' page of the iSD V2 application. It features a search section for existing requests and a main form with multiple fields for creating a new request. The fields are organized into two columns, with some spanning both. The form includes fields for Facility, Building, Floor, Area, Account, Department, Repair Center, Task, Name, Phone #, Email, and Request.

iSD V2 Home WO Request Inventory Shopping Cart

Lookup an existing Workorder Request

Enter Request #

Submit

### Create a new Workorder Request

Facility	School District	Building	Battle Creek Middle School
Floor	Second Floor	Area	
Account	Automation test	Department	
Repair Center			
Task			
Name	Name	Phone #	Phone
Email	Email		
Request	Request		



# Requestor Login Improvements

We are updating the Requestor Login experience to be more like our User Dashboards. This includes some additional features for more advanced requestor personas.

Our Request Status Browse is now drillable totals at the top of the screen as opposed to just raw totals. With the results of those queries, requestors are now able to export that data into Excel. Additionally, we have added more display columns to be visible so a requestor can see what work was chargeable and any expected costs. These features were released in **September 2022**.



# Other Minor Feature Enhancements To Highlight

**01**

AP Invoice Export/ AP Payment Import added to Universal Procurement Interface

**02**

Global Defaults can be set on the Identity tab of user records

**03**

Additional options for hiding more fields for Material Requests





# Upcoming Feature Releases



# Space Management

We are demoing the foundation of our first offering in the Space Management area during this User Conference. The below features will serve as a foundation for continued development in this area:

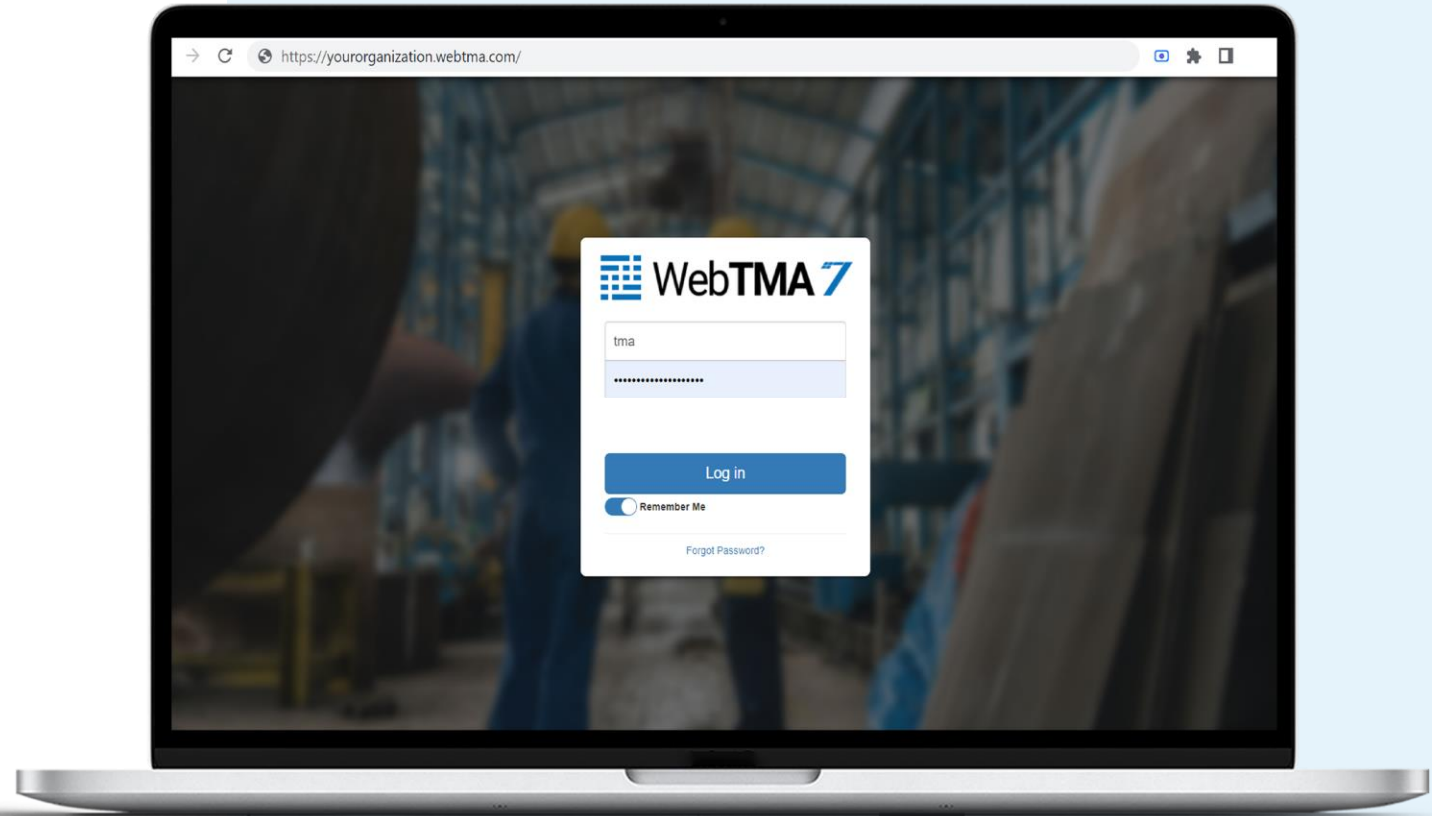
- Ability to link CAD drawings directly to WebTMA Floor/Building records
- Ability to update space inventory and SQF directly from drawing updates
- Ability to import entire floorplans as Area records into WebTMA
- Department ownership of space can be represented in CAD floor plan reports
- Area function breakdowns will be represented in CAD floor plan reports
- Broken polylines or other drawing issues will be flagged for CAD operators
- CAD floorplan PDFs will be visible in WebTMA for TMA users with proper permissions



# Customer Sub-Domains

Brand your WebTMA Login Page and share information pertinent to your users with newly available sub-domains specific to your organization. This will eliminate the need for customers to enter their Client Name to log in.

We plan to release this feature by the end of Q4 2022.



# Alert Engine

We are developing an Alert Engine allowing users to trigger notifications based on user defined criteria for common transactions in the system.

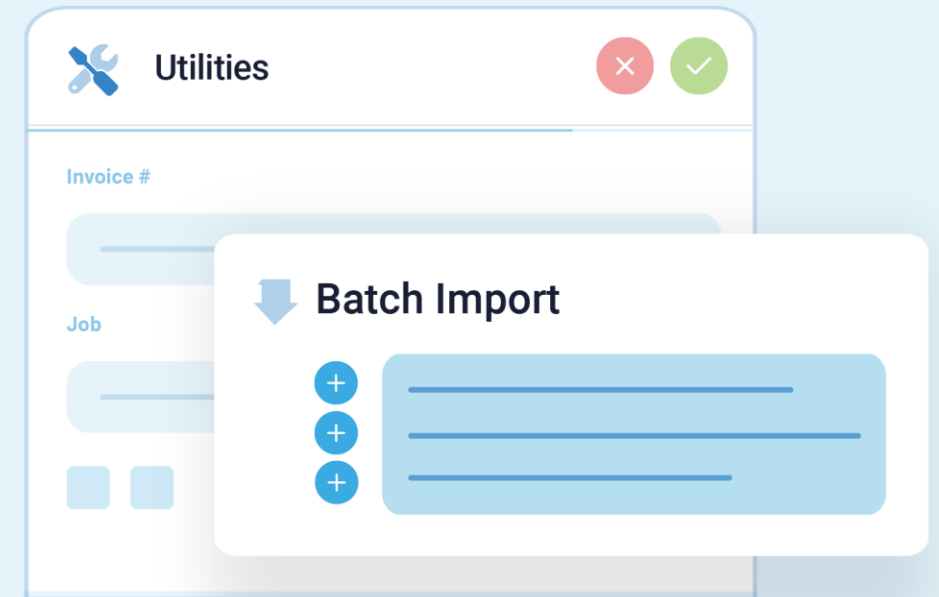
We plan our first release in this area by the end of this year with more to come.



# Import Tool Updates

We are working on a more intuitive way to not just import data, but also make mass updates using a re-design of our import tool. Future development will extend beyond just importing/updating maintenance worthy items.

We plan to release this feature in **Q1 of 2023**





# Eagle Technology

With the acquisition of Eagle Technology our customers can expect to see some of the following features added to WebTMA in the coming year:

- Enhanced location/equipment hierarchy view for better searching and filtering of data
- Expanded IoT integration capabilities to assist customers in their path towards Predictive Maintenance
- Quick links to records across all of WebTMA's menus.
- Task Sequencing – Pre-Requisite Tasks



# Primary Focus Areas - 2023



# New User Interface Priorities

**01**

Better use of screen real estate to improve the look and feel.

**02**

An emphasis on simplifying navigation to common system searches and shortcuts to common transactions

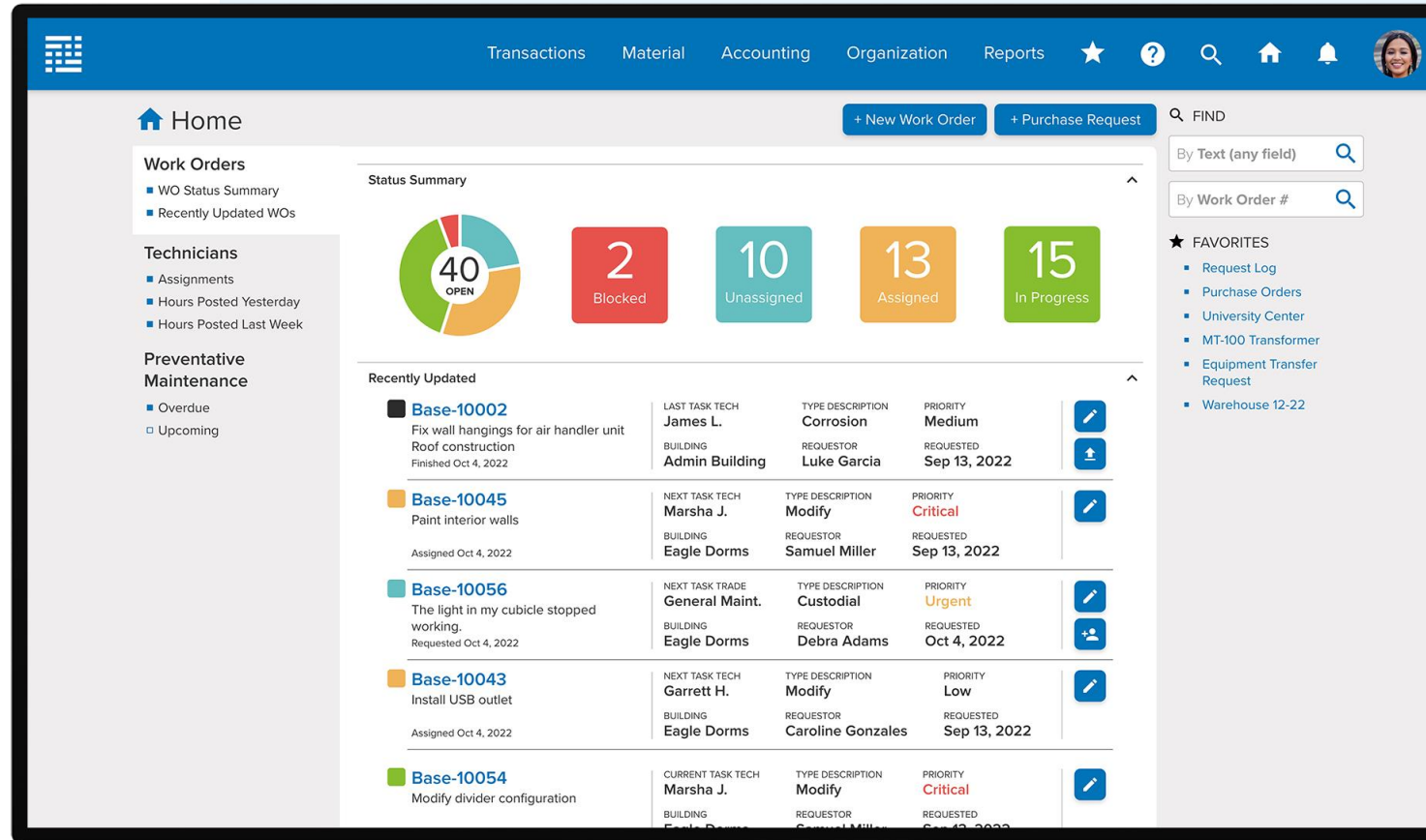
**03**

Build new forms/features on top of WebTMA 7 while giving users the ability to turn them on/off. This ongoing project will not interfere with user's day to day use of the system.



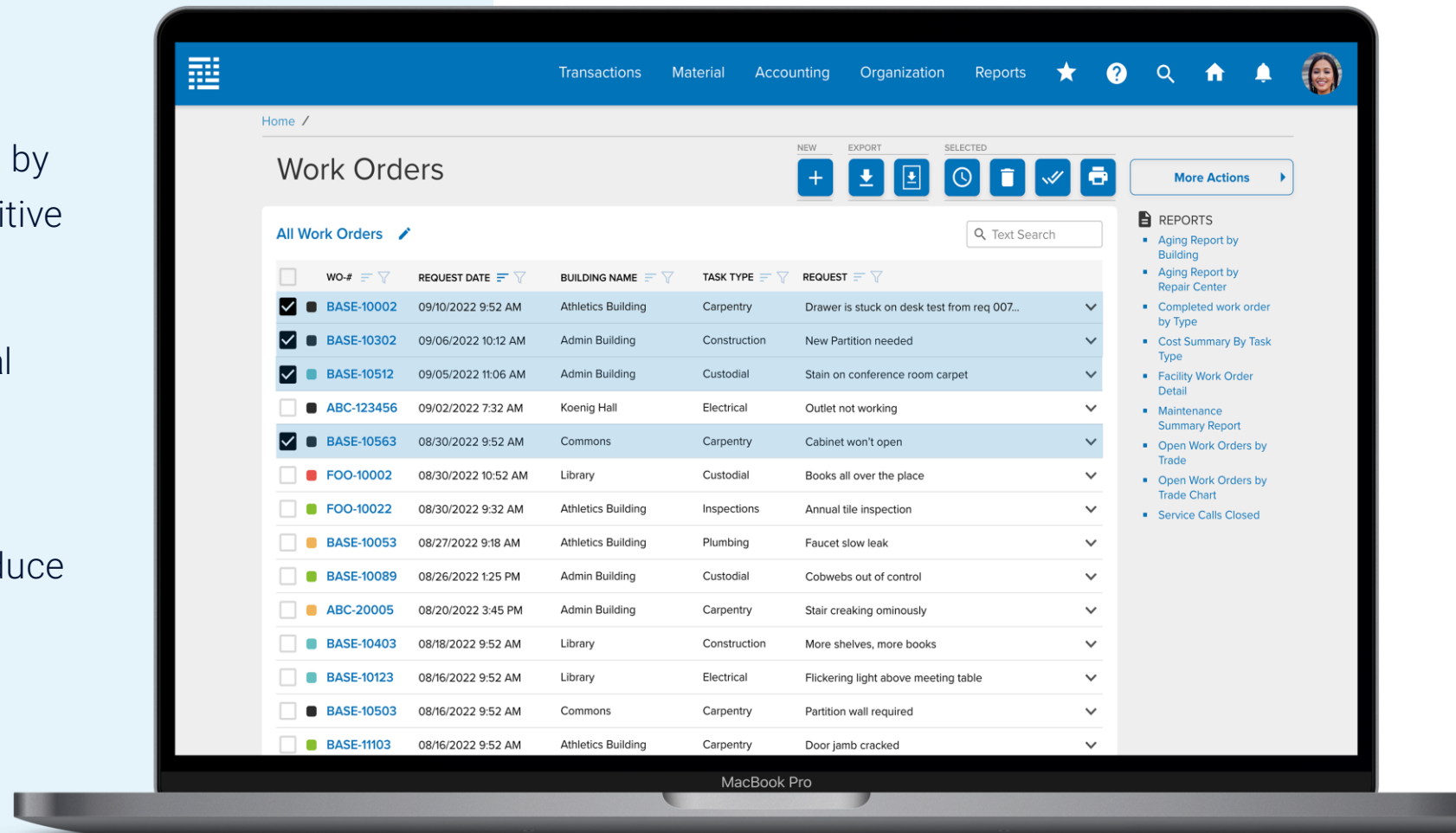
# UX/UI product re-design (in process)

- Provide meaningful and actionable dashboards that can adapt to user roles and patterns
- Take advantage of new technology and frameworks to improve responsiveness, aesthetics and components



# New Work Order window (at-a-glance)

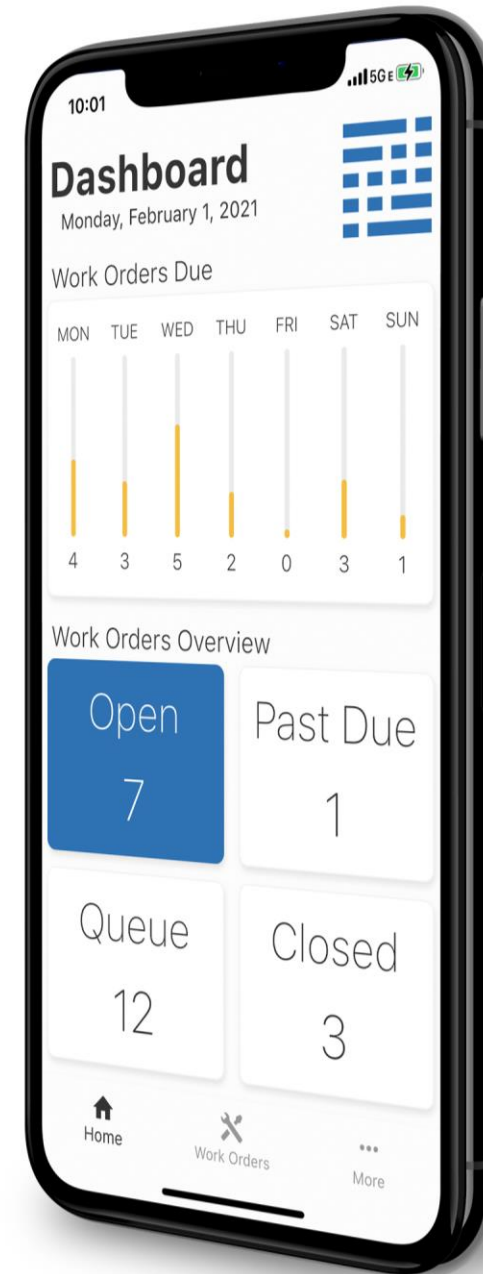
- Improve usability across application by reducing clicks, confusion and cognitive load
- Improve visual hierarchy and general scannability / readability
- Use progressive disclosure and customization where possible to reduce complexity





# New Mobile Offering

- Clean and easy to use mobile interface
- Simplified navigation that minimizes clicks when going in and out of windows
- Easy to access buttons for common transactions like posting labor/parts/other charges
- Focused on Technician functions initially with plans to build a fully functional single mobile offering that appeals to many kinds of users.



# Business Intelligence

- Embedded graphical reporting within WebTMA with the ability to create multiple kinds of visualizations.
- Enhanced notification/alerting features
- Stock KPIs and dashboards provided by TMA.
- Direct Database Connect allowing customers to connect their own business intelligence tools if they prefer.



# Cycle Counting and LIFO/FIFO

- Ability to perform scheduled Cycle Counts and report on inventory variance using both desktop and mobile.
- ABC Part Classification
- LIFO/FIFO to accurately report on the value of stock on hand.





# Thank you.

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