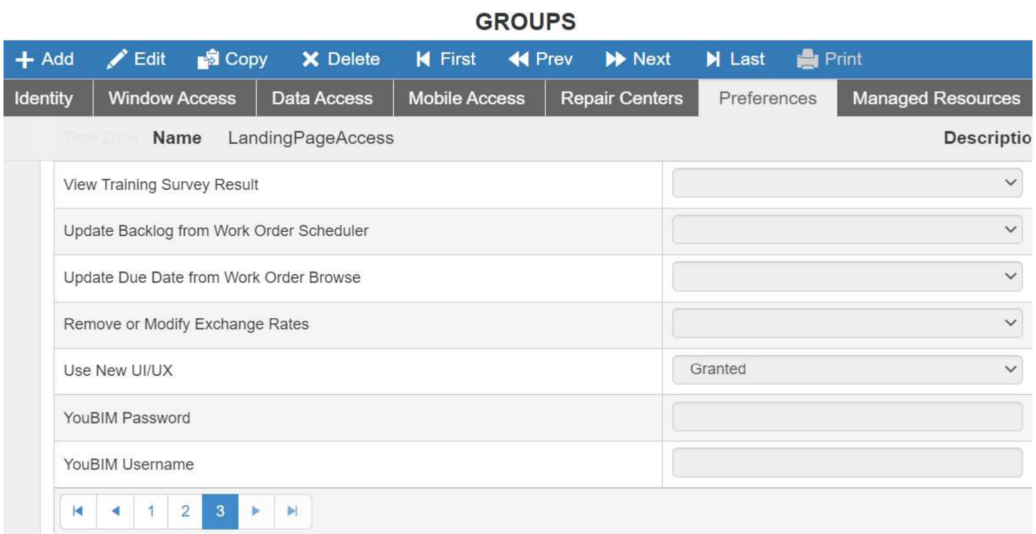
TOC

Granting Access to New UI

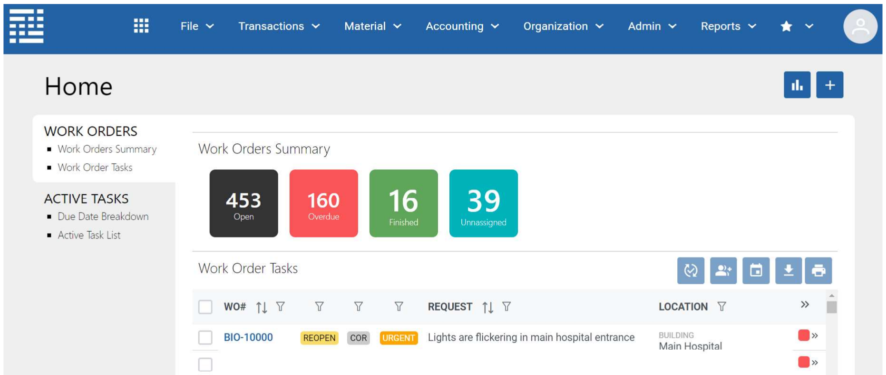


Path: *Admin > User Management > Groups > Preferences Tab*

1. Navigate to the *User Management > Groups > Preferences* tab.
2. Select a User Group (you may also grant this access to an individual user).
3. Set the *Use New UI/UX* value to *Granted*.

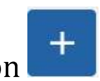
NOTE: This setting will direct users upon login to a page they have not seen before. Communicate this with users in advance to avoid any confusion.

New UI Home Page



When you log into WebTMA, you will be given the option to navigate to a new Home Page that provides you with a more dynamic and interactive display. This page is designed to give you quick visibility and easy access to your highest priority items, such as Work Orders and Tasks.

To navigate to the new Home Page, select the WebTMA 7 icon.

On the upper right on the new Home Page, select the *Quick Action* button  to quickly create one of the following:

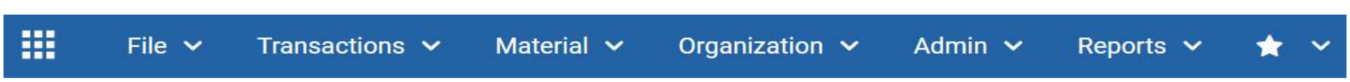
- New Work Order
- New Purchase Order
- New Purchase Requisition

The new Home Page has two views:

- Work Orders (default)
- Active Tasks

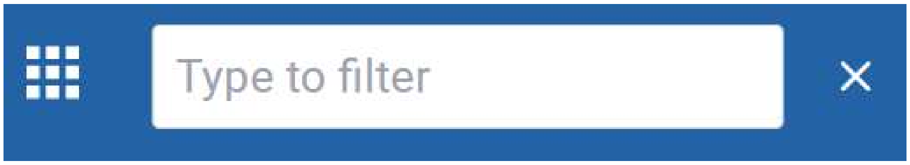
NOTE: If you want to revert back to the traditional WebTMA home page, select the *My Dashboard* button  at the top right of your screen. This will return you to your original *My Dashboard* view.

Menu Bar

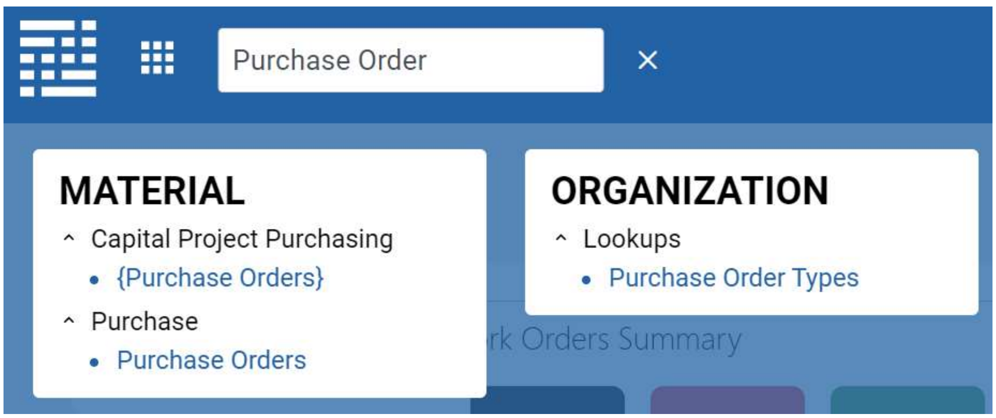


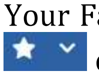
The top menu bar on the new Home Page looks the same as the traditional home page with two notable enhancements:

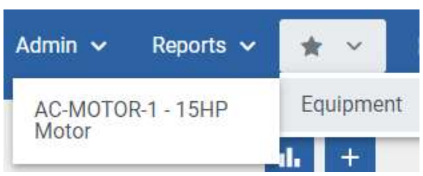
1. If you select the  button on the top left of the menu bar, you can search the entire WebTMA application using the *Filter* field:



For example: If you want to find Purchase Order information, enter *Purchase Order* in the *Type to filter* box and select the desired page from the search results (see image below).

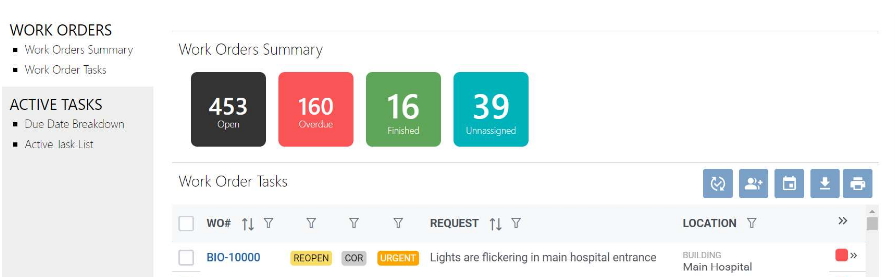


2. Your Favorites are now accessible by selecting the dropdown next to the star  on the upper right of the menu bar:



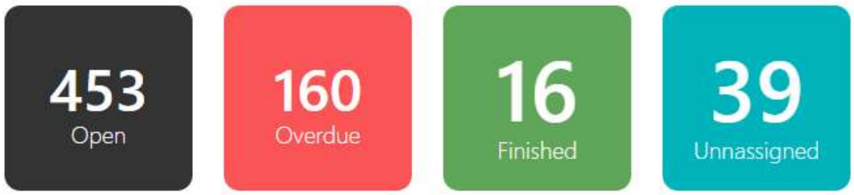
Select an item from your Favorites dropdown to open the item record.

Work Orders View



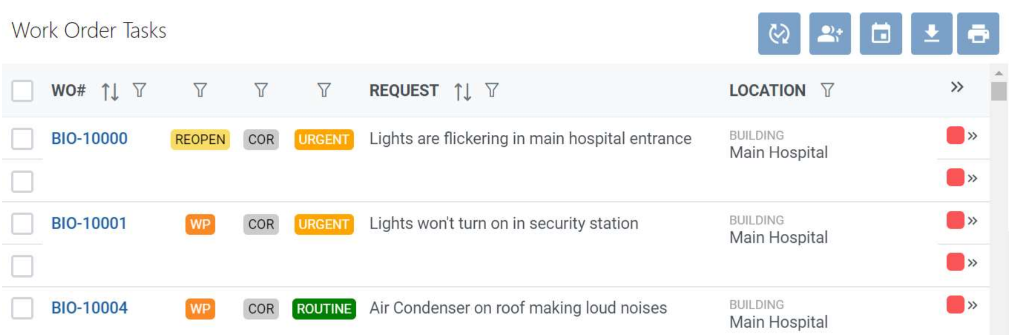
The new Home Page will default to the *Work Orders* view. This view provides you a high-level *Work Orders Summary* section and a detailed *Work Order Tasks* list.

Work Orders Summary



The *Work Orders Summary* section provides you a visual overview of all your Work Orders by the following statuses: Open, Overdue, Finished and Unassigned. You can select the *Overdue*, *Finished* and *Unassigned* buttons to have the *Work Order Tasks* list filter show only those items.

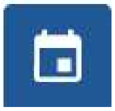
Work Order Tasks



The *Work Order Tasks* section provides you with a detailed list of all your organization's Work Orders. You can filter the list by WO#, Status, Work Order Type, Request, Location, Due Date, Trade, Task and Technician(s) by selecting the filter button  at the top of the desired column. You may also take action on your Work Orders by marking the check box on a Work Order(s) and choosing one of the following buttons from the top right of the list:

 **Update Status:** Choose this button to update the Status of the selected Work Order(s).

 **Assign Technician(s):** Choose this button to assign a technician(s) to the selected Work Order(s).

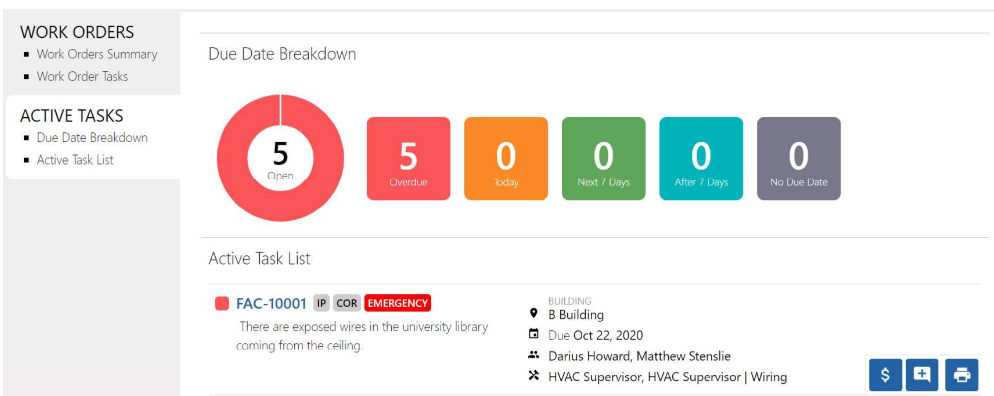
 **Update Due Date:** Choose this button to update the due date on the selected Work Order(s).

 **Export to CSV:** Choose this button to export the selected Work Order(s) to a csv file.

 **Print:** Choose this button to print the selected Work Order(s).

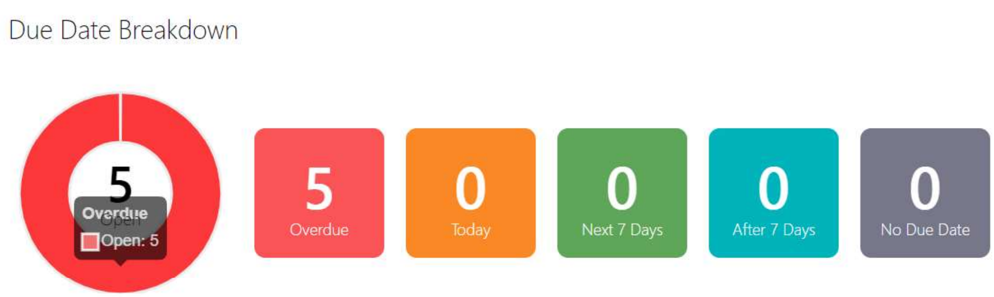
NOTE: After choosing an action that will affect a Work Order status, refresh the page to show the updated list.

Active Tasks View



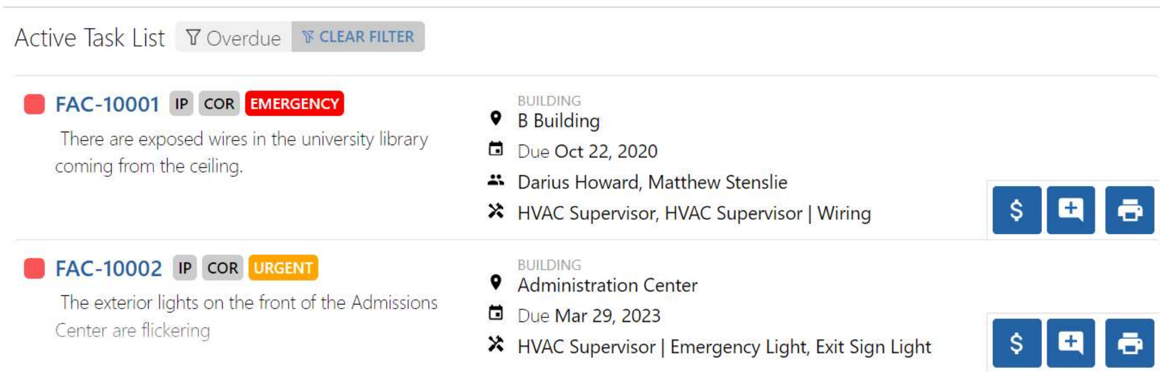
The *Active Tasks* view has two sections: *Due Date Breakdown* and *Active Task List*.

Due Date Breakdown



The *Due Date Breakdown* section provides you a visual overview of all your active tasks by the following statuses: Overdue, Today, Next 7 Days, After 7 Days and No Due Date. You can select the any of these buttons to have the *Active Task List* show only those items.

Active Task List



The *Active Task List* shows all your active tasks. You can filter these using the buttons in the *Due Date Breakdown* section.

You may also take action on a task by selecting one of the following buttons to the right of each listed task:

Post Cost: Select this button to open the *Work Order Cost Entry* page.


Add Task Comment: Select this button to add a comment to the task.


Print: Select this button to print the task.