



UC23 | October 3-5, 2023

# What's New in WebTMA7

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TMA Systems



## Luis Pino

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Luis has worked in many capacities at TMA. Starting in the Call Center in 2001, he worked through roles in Professional Services, Sales, and as a Sales Engineer. He even spent 2 years working onsite for one of the country's largest school districts in the northeast. He is currently charged with leading the Account Management team.

In his spare time, Luis spends time with his wife, Missy and son, Charlie, attending regional sporting events of all kinds.





# Agenda

1. GIS
2. New UI/UX
3. Login Page
4. Virtual Warehouse
5. Area Department Nested Use
6. UDF Enhancements
7. Mass Import Tool
8. WebTMA 7 Exclusive Modules



# Geographic Information System (GIS)

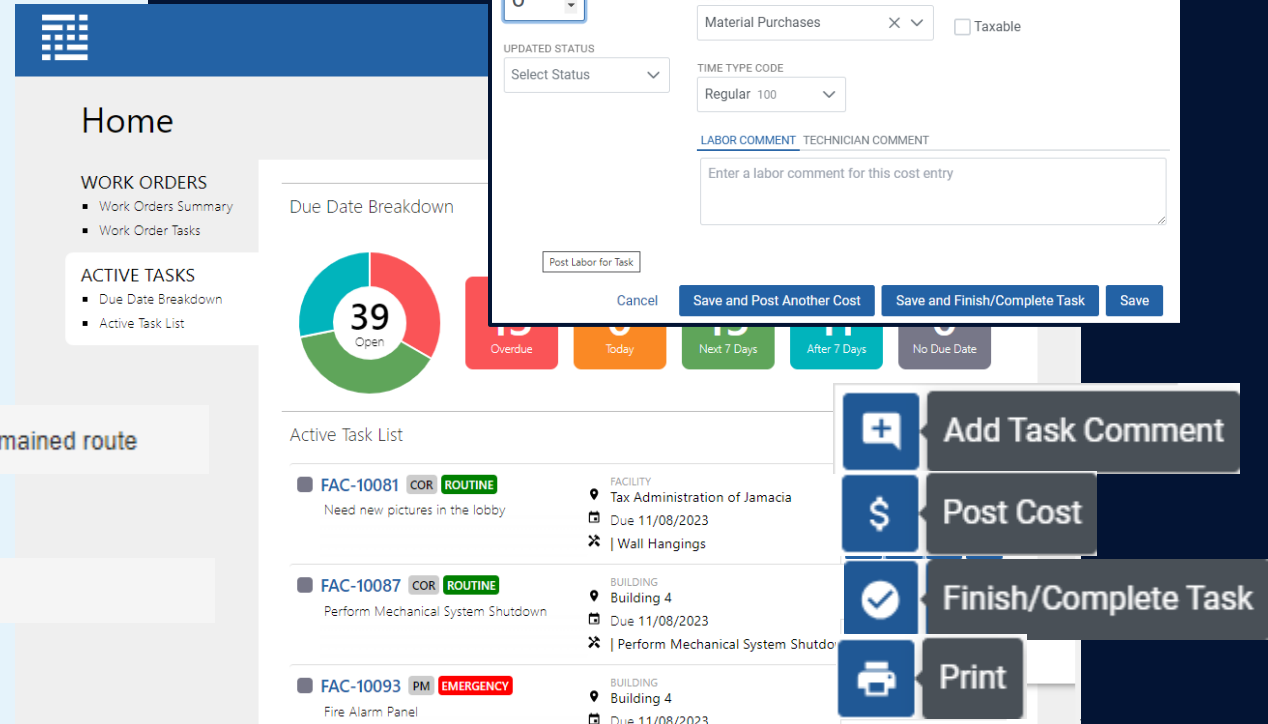
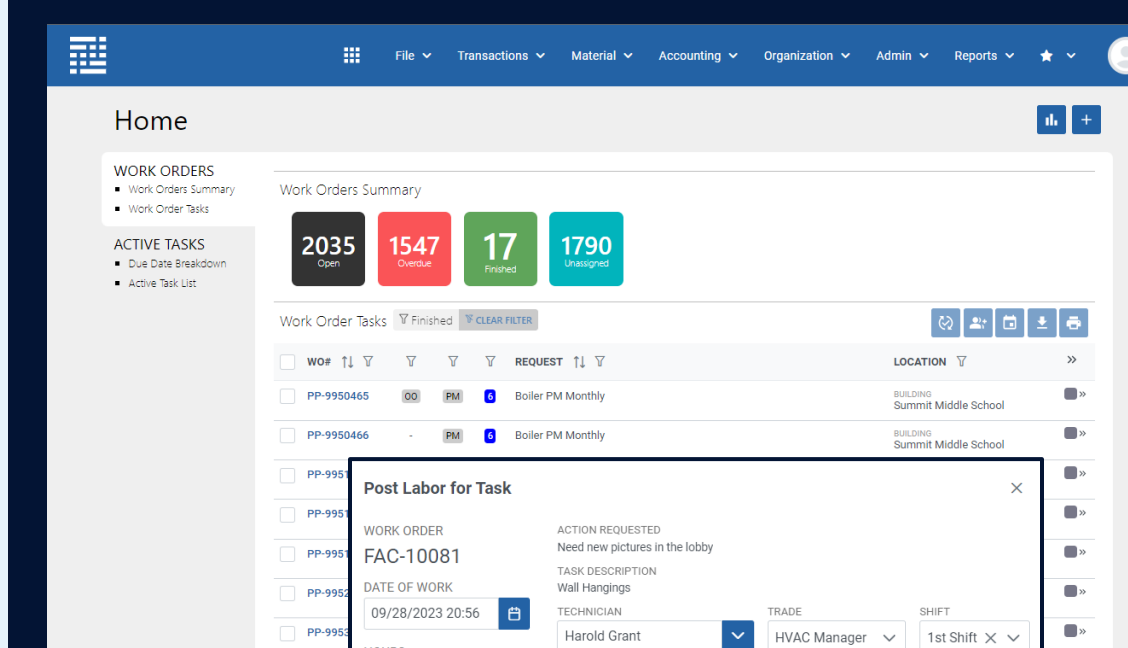
- The GIS module allows users to visualize your Work Orders, Requests, and maintenance-worthy items on a map.
- Integration with ArcGIS provides a more customized GIS Map experience.
- ArcGIS enables you to add more features and imagery to your map to meet your organization's needs.
- GIS (Basic) will now become part of the base WebTMA application.



# New UI/UX

The New UI gives you quick visibility and easy access to your highest-priority items, such as Work Orders and Tasks.

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

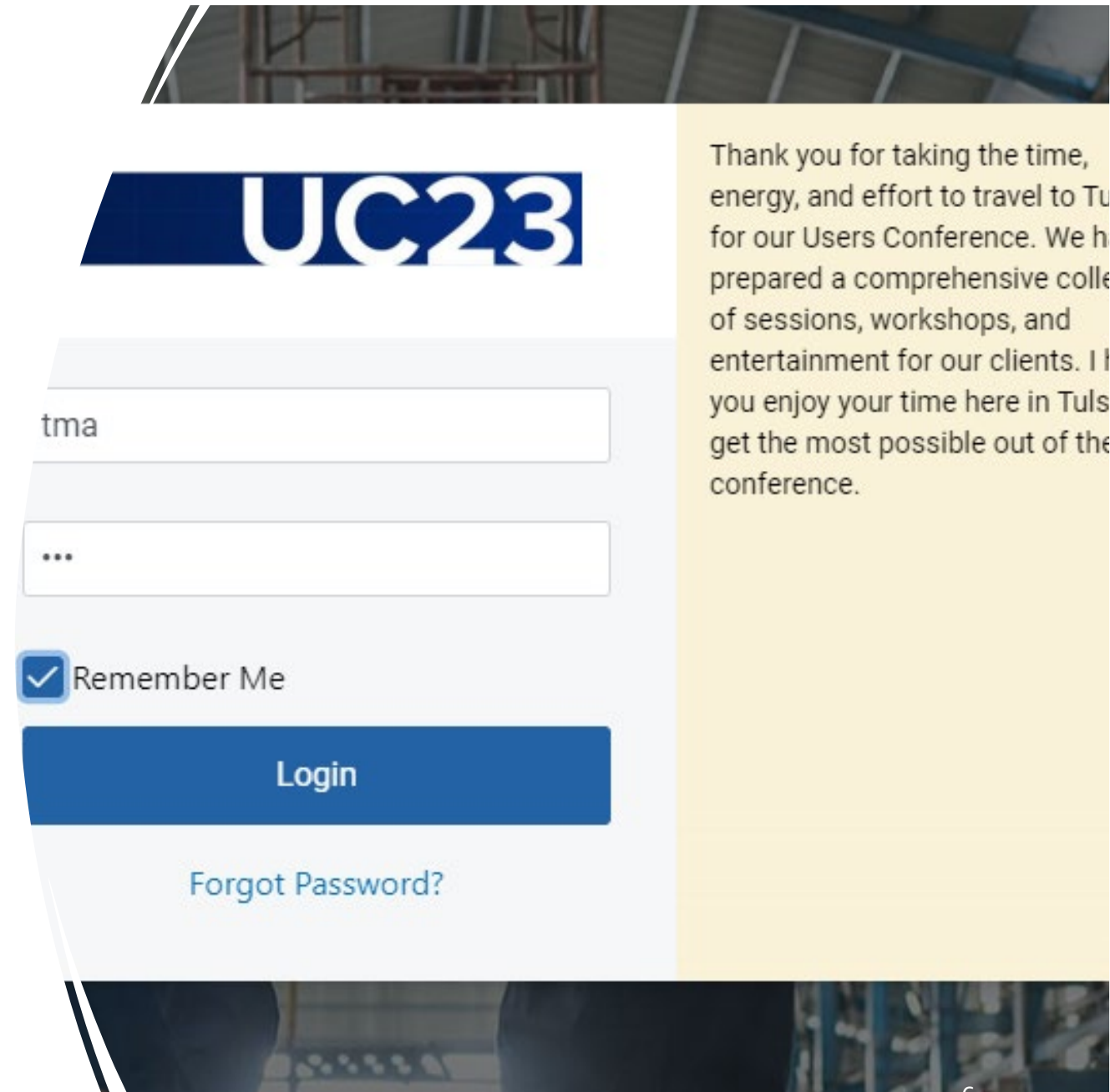


- CLIENT INFO**  
Redirect client to new login page when using subdomained route
- USER MANAGEMENT**  
Use New UI/UX



## Login Page

- The new bulletin feature on the Login page provides your organization the opportunity to remind users of critical updates and deadlines whenever they login to WebTMA.
- Must be enabled in Client Info / Preferences
- Using the Subdomain, removed the requirement of using the client name as part of the login.



# Virtual Warehouse

- Summary: You can now set up a Virtual Warehouse for accounting and reporting purposes.
- When a separate Central Warehouse supports one or more departments, departments like Facilities can establish a Virtual Warehouse.
- The Virtual Warehouse is assigned to the Trades that receive the parts from the Central Warehouse.
- Part Transfers created automatically when the warehouse issues to a work order
- The Central Warehouse bills the Trade account and is assured of prompt payment.
- The Trade bills the account on the work order for the parts they received.

**WAREHOUSES**

✓ Save ✕ Cancel

Identity Repair Centers Part Inventory

General Information

Most Items Taxable  Code\* VWJ

Address Line 1

Address Line 2

City

State

Phone #

Fax #

Default PO Email  Virtual

Part Transfers

✕ Quick Post Material Entry Save Save & Add Save & Clone Cancel

General

Work Order # BIC-1002

Task\* 16009-General Electrical Work(Electrical Sys)

Technician Code\* cmb

Technician Name\* Christian Butler

Part/Material\* AC10006-A1AIN

Quantity\* / Avail 1 / 5

Hard Start Kit, AC Compressor, 1/12 to 1/5 HP

Date of Work\* 2023-08-01

Account # 12345

No Charge  Taxable

The Trade associated with this Task determines the Virtual Warehouse's Account Number

Post Charges

✕ Sub Ledger Criteria List Sub-Ledgers Reset Criteria Cancel

Filter By Department Name

Work Orders  Fuel and Oil Tickets  Project Requisitions  Sales Orders  Part Transfer  Utility Ticket  Journal Entry  Rentals  Expense Tickets

Part Code	Part Description	Task Description
15FTCORD-VW	15 FT Extension Cord	General Electrical Wo

Part Code	Part Description
BallValve-MWAREHOUSE	1" B
15FTCORD-VW	15 FT Extension Cord
BallValve-VW	1" Bronze Ball Valve



## Area/ Department Nested Use

- Area records that show multiple ownership for different Departments now allow a usage split within each Department.
- Example: One Area (room) may have a 50/50 split between the English Department and Humanities and Social Sciences.
- Within those splits, the Humanities may further divide the Area function with another 90/10 split between Classroom and Laboratory. The English Dept may set up their own splits.
- With this nested approach you can determine each Department's percentage and type of usage.

The screenshot displays the UC23 AREAS application interface. At the top, there are navigation menus for 'Admin', 'Reports', and 'Help'. The main header is 'AREAS' with the UC23 logo on the right. Below the header, there are tabs for 'Department', 'Part Reference', 'PMS', 'Monitored Condition', 'Occupants', 'Total View', 'Cost', and 'More'. The current view is 'Department', showing a list of areas. The first area is '002-125B' with the description '125B-Classroom'. Below this, there are two sections for department distribution and area function distribution.

**Department Distribution Table:**

Code	Name	Contact	Phone	Distribution
ENGL	English			50

**Area Function Distribution Table (for ENGL):**

Area Function	Distribution
Class Laboratory	10
Classroom	90

**Department Distribution Table:**

Code	Name	Contact	Phone	Distribution
HUM	Humanities and Social Sciences	Andrea Macdonald	545-6865	50

**Area Function Distribution Table (for HUM):**

Area Function	Distribution
Class Laboratory	10
Classroom	90



# UDF Enhancements

- Views for UDF fields have been added.
- UDF's on request forms can be mapped to Action Requested field.
- UDF's allow the ability to build a picklist.
- UDF's can be displayed on Identity Window
- Path for UDF info to be passed from Request to WO. Requires both forms to use the same UDF field name.

The screenshot shows the 'REQUEST LOG' interface with two tabs: 'Identity' and 'Approval Routing History'. The 'Request Information' section includes fields for Requestor Name (TMA User), Phone #, Requestor Email, Notify Me (checked), Facility Name, Building Name, Floor Code, and Area #. There are also dropdown menus for Request # (09/29/2023), Request Date (10:02 AM), Request Type (Event Request), and Repair Center Name. The 'UDF' section contains a large text area for Event Title, Event Type, Start Date, End Date, # of Attendees, Will Cash be collected at the event?, and Will you be hiring 3rd party Vendors? There are also checkboxes for Intended Audience, Do you need extra time for setup / rehearsal?, Reserve Parking, I agree, Will Alcohol be served at the event?, and Will Food be served at the event?.

The screenshot shows the 'UDF' form with the following fields: Event Title, Event Type, Start Date, End Date, # of Attendees, Will Cash be collected at the event?, and Will you be hiring 3rd party Vendors?.

The screenshot shows the 'UDF' form with the following fields: Request Date (9/29/2023), Requestor Name, Phone #, Requestor Email, Facility Name, Building Name, Describe Area/Room (if applicable), Action Requested, Linked Document, Event Type, # of Attendees, Event Title, Start Date, End Date, Do you need extra time for setup / rehearsal?, Will Alcohol be served at the event?, Will Food be served at the event?, Affiliation, Intended Audience, Reserve Parking, Will Cash be collected at the event?, and Will you be hiring any 3rd party vendors for the event?.



# Mass Import Tool

- 3-step process to import records directly from the front-end UI. (Load, Verify, Import)
- Dupe Check and other data validation rules enforced.
- Available for Biomed currently; Other MWI's coming soon.

The screenshot shows the 'Import' interface in a 'Review and Import' step. It features a progress bar at the top with three stages: '1 Configure Import', '2 Review and Import', and '3 Import Complete'. Below the progress bar, summary statistics are displayed: '9 Total Records', '8 Records to Create', '0 Records to Update', and '1 Record to Skip'. A table of records is shown with columns for 'CONTROL ID', 'ALTERNATE TAG #', 'MAKE NAME', 'BIOMED TYPE', 'DEVICE TYPE', 'PARENT TAG #', 'FACILITY', 'BUILDING NAME', 'FLOOR CODE', and 'AREA'. The table contains 11 rows, with the first 10 rows marked 'CREATE' and the last row marked 'INVALID'.

	CONTROL ID	ALTERNATE TAG #	MAKE NAME	BIOMED TYPE	DEVICE TYPE	PARENT TAG #	FACILITY	BUILDING NAME	FLOOR CODE	AREA
<input type="checkbox"/>	CREATE TMA04		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA05		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA06		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA07		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA08		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA09		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA10		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	CREATE TMA11		TMA01	Equipment type description	TMA		Alabama Community College System			
<input type="checkbox"/>	INVALID TMA11		TMA01	Equipment type description	TMA		Alabama Community College System			

This panel shows the 'Import' summary and history. It includes a 'HISTORY' section with 'Import Summary' and 'Import List'. Below this is a 'TEMPLATES' section with 'Excel Templates'. The 'Import Summary' section features a donut chart showing '1 Imports' (green), '1 Complete' (green), '0 Partial' (yellow), and '0 Failed' (red). Below the chart is an 'Import List' section with a 'Biomed-2' entry showing 'Created: 2 | Updated: 0 | Errored: 0'. A table of import details is visible on the right side of the panel.

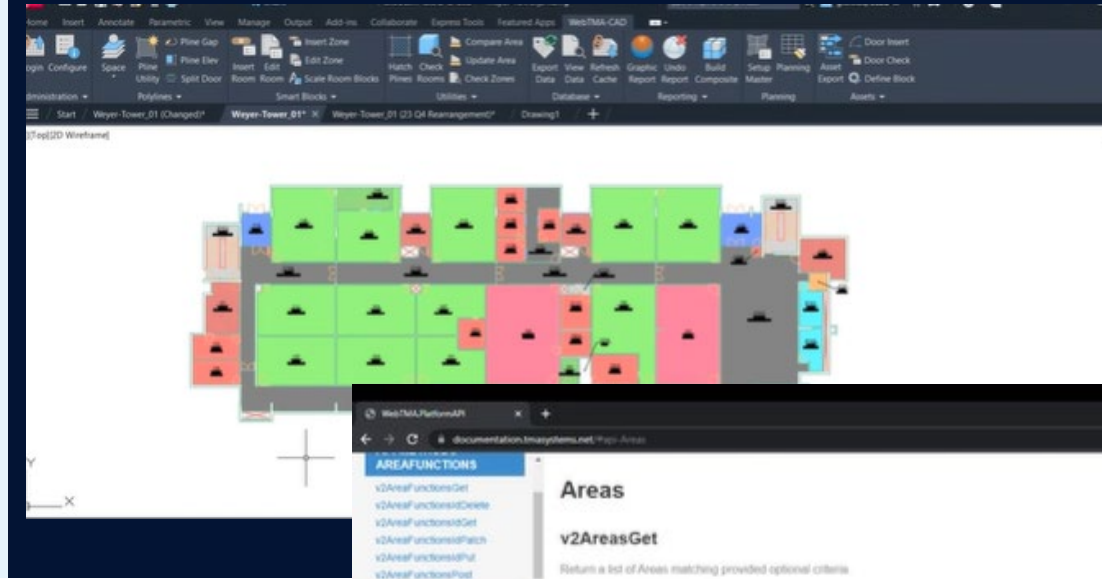
Tag #	Description	Facility	Building Name
1	743FACP-1	Fire Alarm Panel	Building 4
2	743FACP-2	Fire Alarm Panel	Building 4
3	743FACP-3	Fire Alarm Panel	Building 4
4	743FACP-4	Fire Alarm Panel	Building 4
5	743FACP-5	Fire Alarm Panel	Building 4
6	743FACP-6	Fire Alarm Panel	Building 4
7	743FACP-7	Fire Alarm Panel	Building 4
8	743FACP-8	Fire Alarm Panel	Building 4
		Fire Safety	Building 4
		Fire Safety	Building 4
		Tax Administration of Jamacia	Building 4
		Tax Administration of Jamacia	Building 4

This screenshot shows the 'Import' interface in a 'Review and Import' step, similar to the first screenshot. It features a progress bar at the top with three stages: '1 Configure Import', '2 Review and Import', and '3 Import Complete'. Below the progress bar, summary statistics are displayed: '9 Total Records', '8 Records to Create', '0 Records to Update', and '1 Record to Skip'. A table of records is shown, and an 'Import' button is visible at the bottom right.



# WebTMA 7 Exclusive Modules

- Space Management
- Direct Database Connect
- Platform API's
- Customer Survey Redesign
- Added My Dashboard Control to Open WebTMA Windows in Add Mode



## Work Completion Survey

Work Order#  
PP-9958634  
Email  
Request Date  
10/25/2023 02:00 AM

Respondent\*  
PM Scheduler  
Phone

### Performance

1. Did the technician do more than a satisfactory job in the repair of the reported problem?  
 Yes     No     Not Checked

2. Did the technician present him/herself in a presentable manner?  
 Pass     Fail     Not Checked

3. On a scale of 1 to 10, please rate your satisfaction of the overall to the resolution.  
 1 - Bad     10 - Great

4. Please provide any detail about your experience on this work on

**AREAFUNCTIONS**

- v2AreasFunctionsGet
- v2AreasFunctionsDelete
- v2AreasFunctionsGet
- v2AreasFunctionsPatch
- v2AreasFunctionsPost

**API METHODS - AREATYPES**

- v2AreasTypesGet
- v2AreasTypesDelete
- v2AreasTypesGet
- v2AreasTypesPatch
- v2AreasTypesPost

**API METHODS - AREAS**

- v2AreasGet
- v2AreasDelete
- v2AreasGet
- v2AreasPatch
- v2AreasPost

**API METHODS - ASSETS**

- v2AssetsGet
- v2AssetsDelete
- v2AssetsGet
- v2AssetsPatch
- v2AssetsPost

**Areas**

**v2AreasGet**

Return a list of Areas matching provided optional criteria

Return the first 100 Areas

GET <https://webtma.com/api/v2/areas?pageIndex=0&pageCount=100>

Return the next 100 Areas

GET <https://webtma.com/api/v2/areas?pageIndex=10&pageCount=100>

Return the first 100 Areas with ids greater than 1000 and less than 2100

GET <https://webtma.com/api/v2/areas?filter=id%20gt%201000%20and%20id%20lt%202100>

Return the first 100 Areas ordered by Area Code

GET <https://webtma.com/api/v2/areas?pageIndex=0&pageCount=100&sort=code>

**Usage and SDK Samples**

[Curl](#)
[Java](#)
[Android](#)
[Obj-C](#)
[JavaScript](#)
[C#](#)
[PHP](#)
[Perl](#)
[Python](#)

### MY DASHBOARD

Director    Work Control    My Open WOs    Building Demo    UC22 Demo    Technician    Director - PP Non-PM Management    Director

Work Order	Create Request	Total Open Work Orders
Add	Add	2,416
Work Orders by Type - PP		Unscheduled Work Orders
		1,405
		Past Due
		0



# Thank You.

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