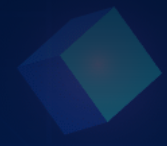
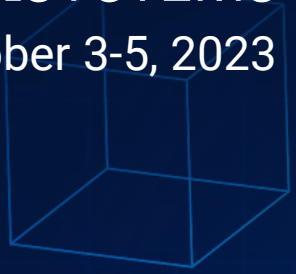




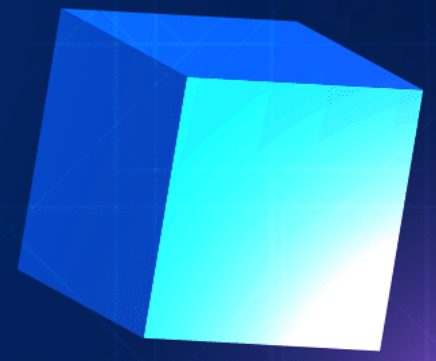
UC23 | October 3-5, 2023



# New Mobile App



Joe McVay, Solutions Engineering Manager, TMA Systems





## Joe McVay

Solutions Engineering Manager

[joe.mcvay@tmasystems.com](mailto:joe.mcvay@tmasystems.com)

Joe rejoined TMA Systems in January of 2022 as the Product Manager, responsible for gathering feedback from our customers and developing the Product Roadmap. He has since taken a new role as the Manager of Solutions Engineering. Joe has over 10 years of experience in the CMMS industry, including 7 years as a Senior Implementation Consultant for TMA.





# Agenda

1. Development Strategy
2. Current Pain Points
3. New Mobile Designs
4. Future Plans
5. Q&A



# New Mobile App – Development Strategy

01

## Intuitive and Easy to Use

All of the most common transactions Technicians are performing throughout their day need to be prominently displayed on any form. Eliminate as many clicks as possible.

02

## Consistent Design With New UI

Our new mobile application needs to be consistent with the designs of the new User Interface. Once a user has learned how to use the web application, it should be as close to the same in the mobile application as possible.

03

## One Mobile Application

Our end goal will be to have a single mobile application that appeals to multiple user personas instead of separate mobile apps for each. We want to reach feature parity with both mobileTMA GO and WebTMA GO in a single application.



# Pain Points To Address – Current Mobile Application



Too Many Clicks – Getting to Tasks



Too Many Tabs – Easier Navigation



Workflow Support – Easy Acknowledgment and Status Updates



Simplified Forms – Avoid Scrolling



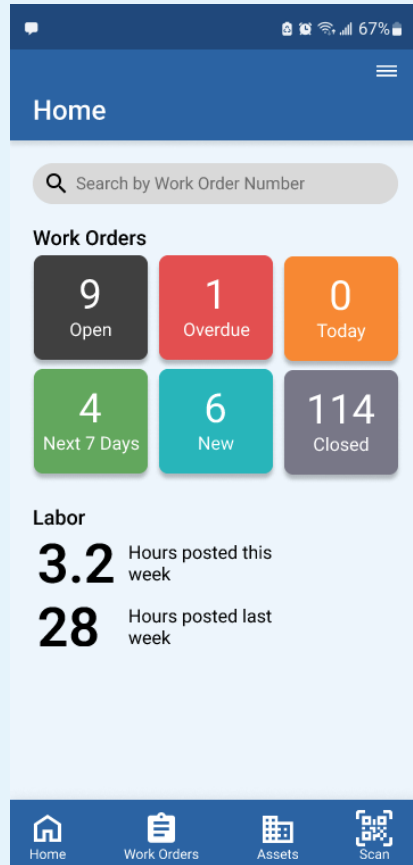
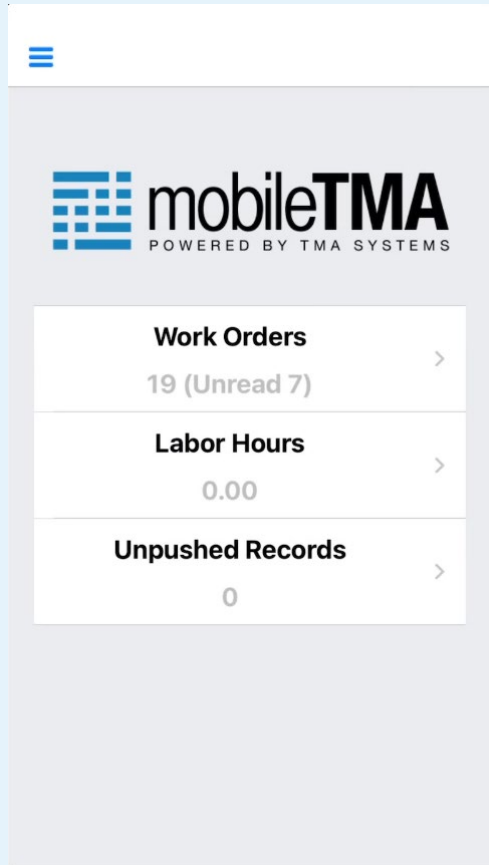
Quick Access to Posting Costs



Modern Look and Feel



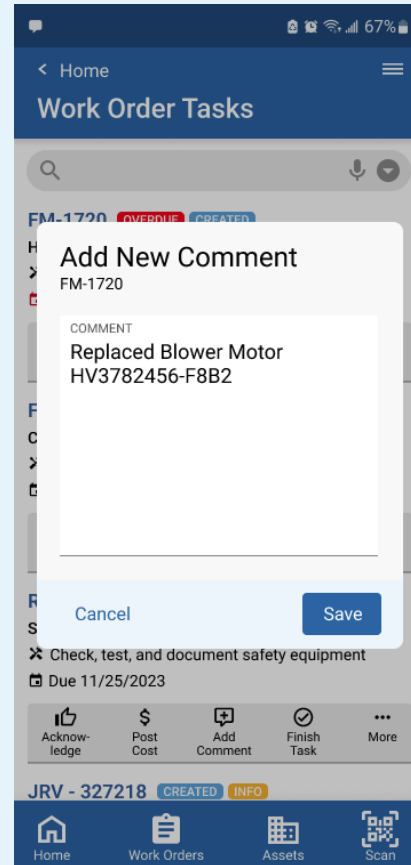
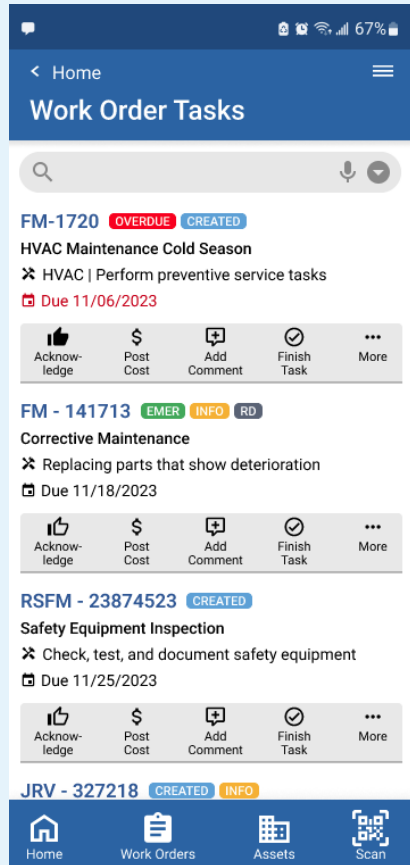
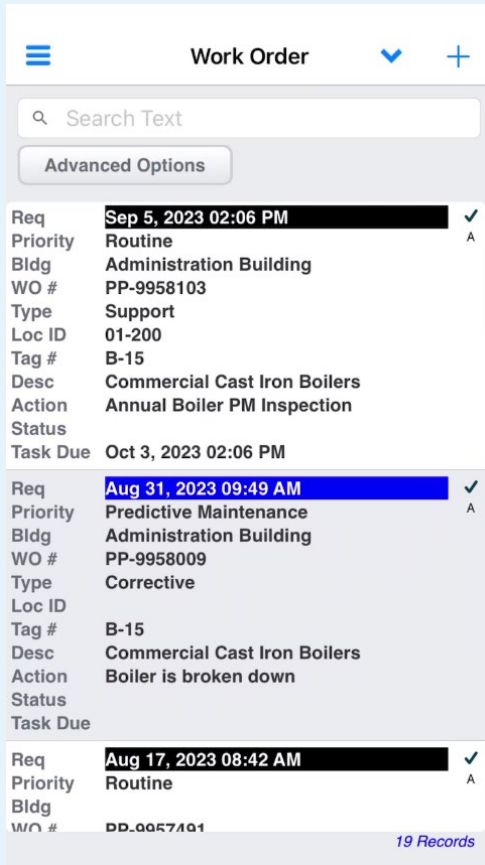
# Home Page Updates



- Better use of screen real estate with quick filter shortcuts to Work Order lists
- Search capabilities directly from the login screen
- Easier access to Technician Time Card
- Using Acknowledge feature as a trackable way to know whether a Technician has read a work order yet.



# List View Updates



- Switching to Work Order Task view as opposed to work orders to eliminate clicks to get to common transactions
- Shortcut buttons to common transactions like Acknowledge, Post Cost, Comments, and Finish/Close
- Navigation buttons always present in the header to eliminate clicks





# Post Cost Updates

Cancel ! QP Labor Save +

WO #  
PP-9958103 >

Task  
BLR-A-001 >

Task Description  
Annual Boiler PM Inspection

Task's Trades  
Mechanic

Tech  
Richardson, George >

Trade  
Temperature Control >

Time Type  
Regular Time >

Hours  
[Redacted]

Shift  
First Shift >

Date  
Sep 29, 2023 08:00 AM >

Position  
>

Acct #

< FM-1720  
Post Labor

TASK  
HVAC | Perform preventive service tasks

HOURS  
4.5

DATE OF WORK  
11/10/2023 10:53 AM

TECHNICIAN  
Eric Heusen ▾

TRADE  
HVAC ▾

TIME TYPE  
Regular Time (WO) 100 ▾

COMMENT  
[Empty text area]

Cancel Save & Finish Save

- Simplified form focused on critical fields in proper order
- Intuitive workflow for posting costs and transitioning directly to Finish/Close
- Navigation buttons always present in the header to eliminate clicks





# Post Cost Updates Cont'd

Cancel ⓘ QP Other Save

Work Order #  
PP-9958103 >

Task  
BLR-A-001 >

Task Description  
Annual Boiler PM Inspection

Trades  
Mechanic

Supplier  
...

Product

Invoice #

PR or PO #

Date of Work  
Sep 29, 2023 >

Quantity

Charge Type >

Unit

< FM-1720  
Post Other Charge

TASK  
HVAC | Perform preventive service tasks

PRODUCT  
Blower Motor HV3782456-F8B2

DATE OF WORK  
11/10/2023 10:53 AM

UNIT

QUANTITY  
1

UNIT COST  
\$455.00

CHARGE TYPE  
Part

COMMENT

Cancel Save & Finish Save

Cancel ⓘ QP Parts Save

WO #  
PP-9958103 >

Task  
BLR-A-001 >

Task Description  
Annual Boiler PM Inspection

Trades  
Mechanic

Tech  
Richardson, George >

Date  
Sep 29, 2023 >

Part  
...

Desc

Serial

Qty

On-hand

Acct #  
...

< FM-1720  
Post Material

TASK  
HVAC | Perform preventive service tasks

DATE OF WORK  
11/10/2023 10:53 AM

TECHNICIAN  
Eric Heusen

SKU NAME  
WH1-HVF3782-C3

PART NAME  
Replacement Filter HVF

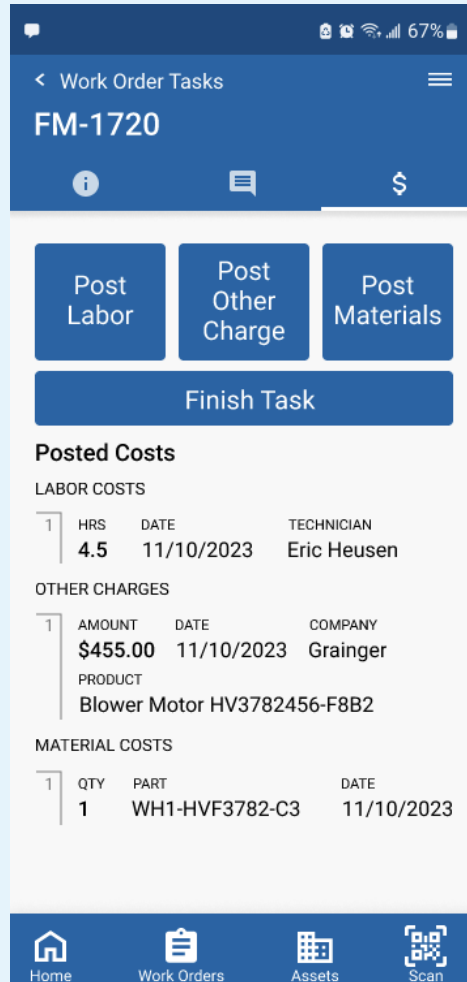
QUANTITY  
1

COMMENT

Cancel Save & Finish Save



# Cost Review Updates



- Existing costs on a work order are visible to the Technician to help eliminate duplicate entries
- Intuitive Action buttons on the work order to Post and Finish/Complete work orders
- Simplified navigation back to list views as well as within a work order record



# Mobile Demonstration

Review new mobile Prototype and compare common transactions in both platforms



# Reduced Clicks

## mobileTMA GO



Post Labor - 4 Clicks From List Screen



Post Comment – 5 Clicks From List Screen



Update Status – 2 Clicks (and scrolling)  
from List Screen

## WebTMA Mobile



Post Labor – 2 Clicks From List Screen



Post Comment – 1 Click From List Screen



Update Status – 1 Click From List Screen



# Path Forward



Focus on Technician persona until the new application reaches feature parity. This will include the PM Process including processing inspections.



Release an MVP (minimum viable product) and incorporate feedback from you!



Build flexibility into the application to serve additional personas in the future like warehouse personnel, supervisors, and work control users



# Thank You.

[marketing@tmasystems.com](mailto:marketing@tmasystems.com) | [tmasystems.com](https://tmasystems.com)

