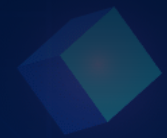
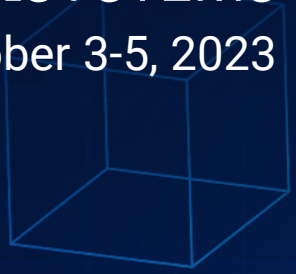


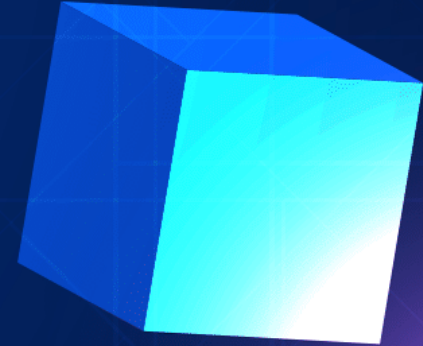
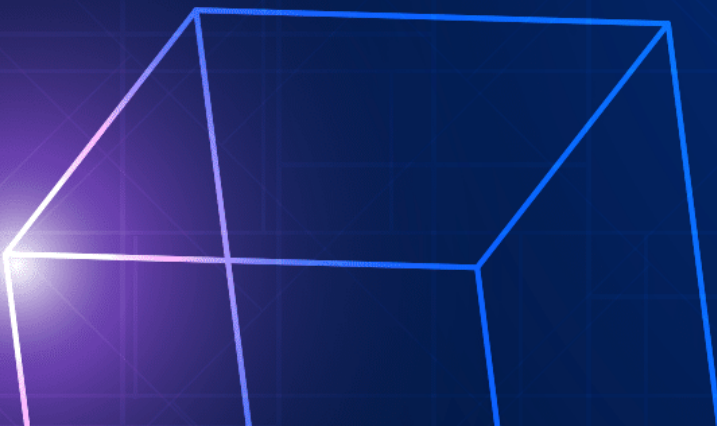


UC23 | October 3-5, 2023



# Product Roadmap

Joe McVay and Andrea Weber





## 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.





## Andrea Weber

Project Manager, Acquisition, Integration & Corporate Initiatives

[Andrea.weber@tmasystems.com](mailto:Andrea.weber@tmasystems.com)

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# Overview

1. Product Roadmap Vision
2. Platform API and Integration Strategy
3. Microsoft Azure
4. Recently Released Features
5. Upcoming Feature Releases
6. Prime Technologies + Integration



# Product Roadmap Vision

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

01

## “Intuitive and easy to use”

An essential part of our feature development philosophy is to create a solution that is easy to understand and have as few clicks as possible to complete your task.

02

## “Client co-innovation for product updates”

Our most valued asset is the voice of the customer. With submitted feedback through our support site, our team is dedicated to quarterly reviews of all client suggestions.

03

## “Better views of spatial data and better analytics”

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

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

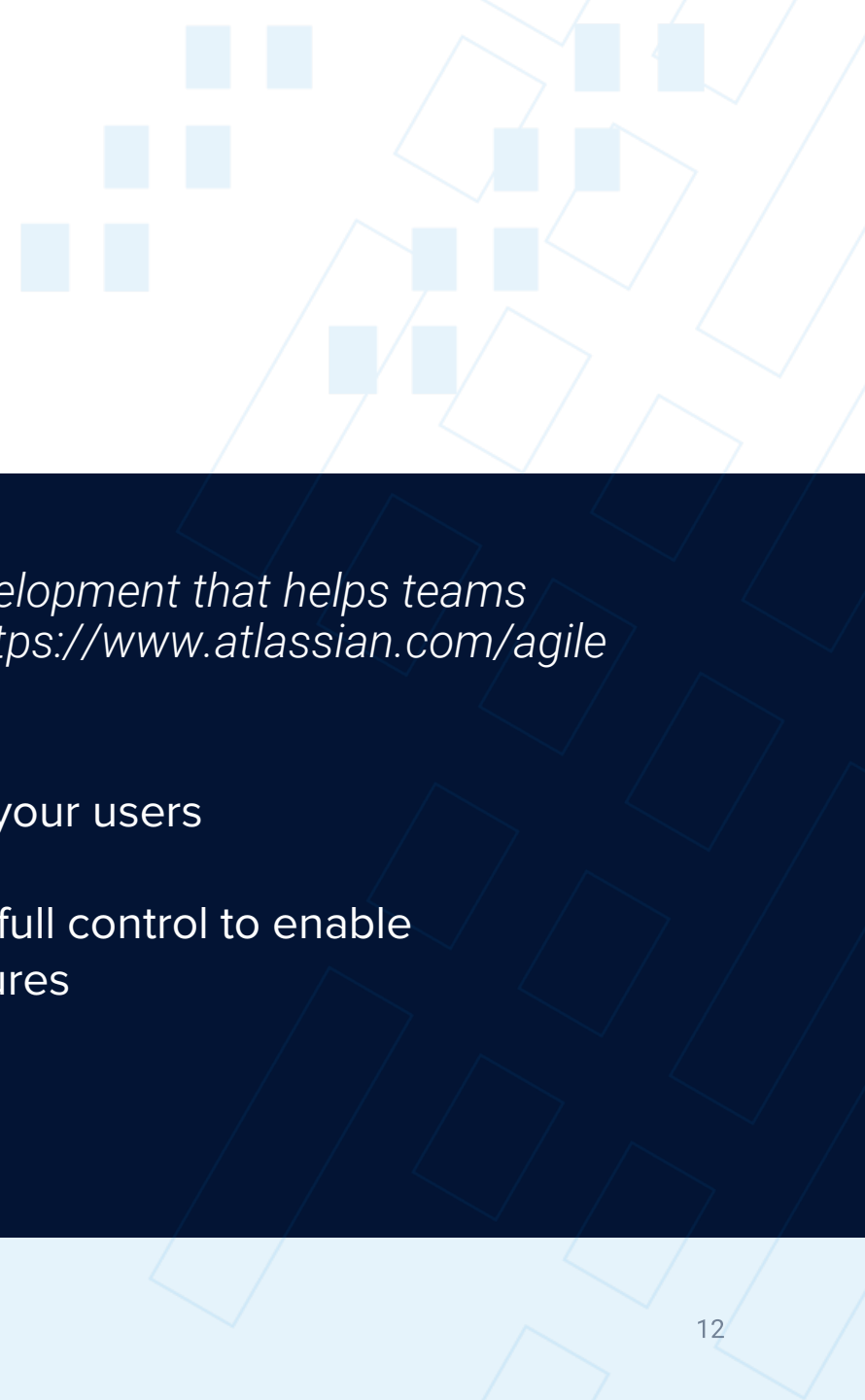
04

## “More flexible and scalable”

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



# 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..." – <https://www.atlassian.com/agile>*

- Smaller, more frequent feature releases – more easily adopted by your users
- Faster time to market for both new features and fixes
- New features delivered are defaulted to "off" giving administrators full control to enable
- Documentation and training material delivered alongside new features
- Higher quality testing due to smaller code changes



# Platform APIs

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



# Microsoft® Azure

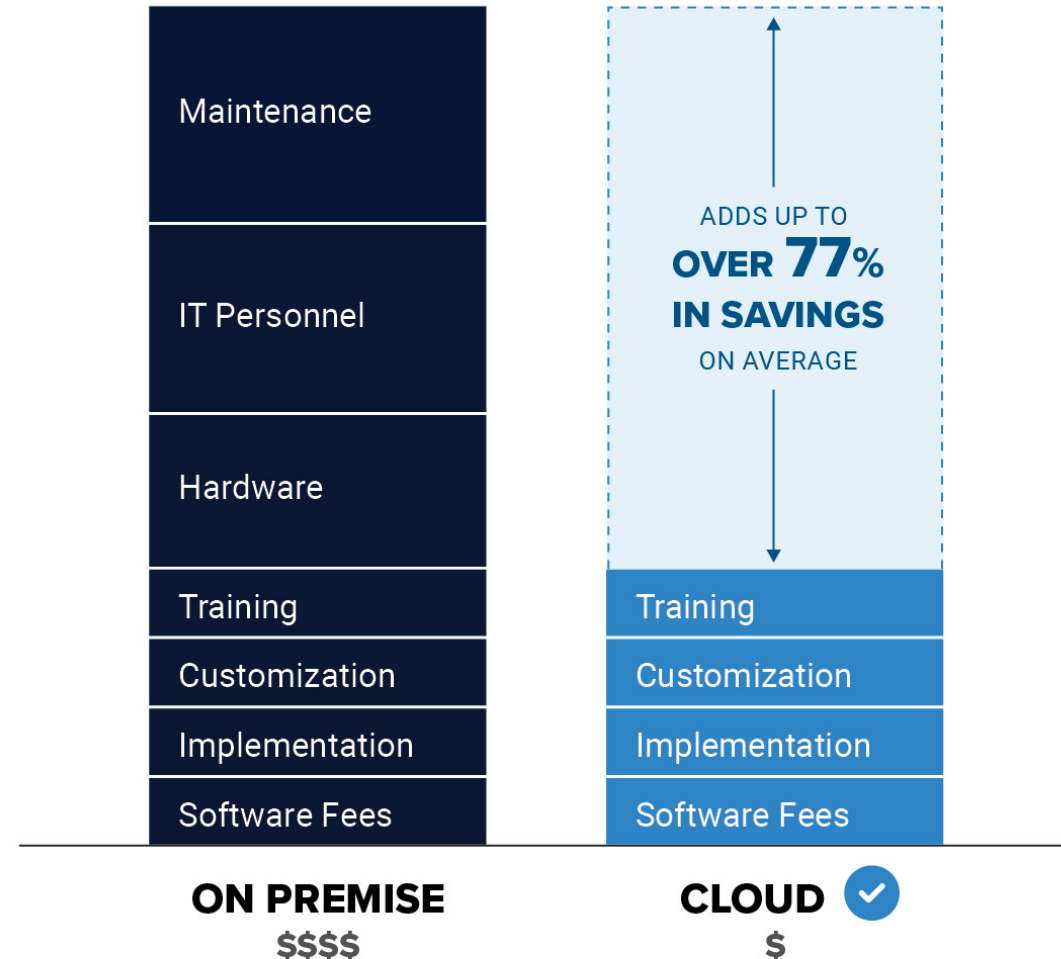
TMA is committed to providing a best-in-class SaaS hosting environment to our customers. We have completed the work on the production environment in Microsoft Azure and it is now available to all hosted customers.

- 99.8% 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



# MAXIMIZE UPTIME AND SAVE ON COSTS

Discover the benefits of switching  
to WebTMA Cloud Hosting





# Recently Released



# Additional Minor Enhancements

Continued development of WebTMA

01

## Calibration Dates Enhancement

Added AutoTrack task to stamp calibration related work orders.

02

## Barcodes

Added the ability to render barcodes on system and user generated reports in WebTMA 7.

03

## Service Request Form – UDF Dropdowns

Administrators can now make use of UDF (User-defined field) drop-down fields on their service request forms for a more fully customized work request interface.

04

## Work Request to Work Order UDFs

Administrators can add UDF Fields with the same label/data type to both work requests and work orders.

05

## NOAA Weather Integration

Import weather data directly from NOAA (National Oceanic and Atmospheric Administration) to related weather stations.

06

## New Login Page – Bulletins

WebTMA 7 clients in the Azure environment now have the ability to enter custom bulletins for their users to view on their newly branded login page.



# 2023 Product Releases

An overview of the major Product Roadmap releases over the last seven months

## Q1 2023

**Jan 2023 – Alert Rules** – Configurable email alerts based on system queries for Work Orders, Work Requests, Projects, and more.

**Feb 2023 – GIS: Phase Two** – Create Work Requests and Work Orders directly from a GIS Map View. Now use WO Browse queries to display work order locations on your GIS maps.

**Mar 2023 – Space Management: Phase Two** – API endpoints allow work order data to be included in reports on top of AutoCAD floorplans. Area Functions are now nested under the owning department and allows percentage splits.

## Q2 2023

**May 2023 – New UI Homepage** – enhanced, modern user interface with more intuitive navigation and search features.



# Upcoming Feature Releases



# New UI – Additional Enhancements

An enhanced user interface in the form of a new landing page was officially released on **May 2**. The following enhancements **will be released in Q3** :

01

Streamlined posting of costs

02

Simplified finish and closure of work orders

03

Optimized 'shopping cart' feature to enhance posting of material charges

The screenshot shows a 'Post Labor for Task' modal form. The form fields are as follows:

- WORK ORDER:** MAIN-294
- DATE OF WORK:** 05/17/2023
- HOURS:** 6
- TECHNICIAN:** Darren Brown
- TRADE:** HVAC
- SHIFT:** First Shift
- ACCOUNT:** Labor Default Account
- TIME TYPE CODE:** Regular
- TIME TYPE SUBCODE:** TrainerSub
- COMMENT:** (Empty text area)

Additional form elements include checkboxes for 'No charge' and 'Taxable', and buttons for 'Cancel' and 'Save Labor Entry'. The background shows a blurred view of the work order details page.

\* To learn more about WebTMA's new UI landing page, [watch our webinar in the Knowledgebase](#).



# Mass Import Tool

In a previous roadmap deck, we outlined proposed release of Biomed Imports for end of Q2. This is **now slated for Q3**.

Additional tables to be included before end of year include Equipment, Utility Meters/Tickets, Assets, Vehicles, Areas, and more.

The screenshot shows the 'Mass Import' tool interface. At the top, there are navigation menus for 'File', 'Transactions', 'Material', 'Organization', 'Admin', and 'Reports'. Below the navigation is a progress bar with four steps: 1. Configure Import, 2. Select File, 3. Review and Import (current step), and 4. Import Complete. The main area displays a table with the following columns: CONTROL ID, ALTERNATE TAG #, MAKE NAME, BIOMED TYPE, DEVICE TYPE, PARENT TAG #, FACILITY, BUILDING NAME, FLOOR CODE, and AREA #. The table is divided into sections: 99 Total Records, 7 Records to Create, 0 Records to Update, and 92 Records to Skip. A dropdown menu is open over the 'DEVICE TYPE' column, showing options: 10000, 10020, 10030, 10050, and 10060. The table rows are color-coded: red for 'INVALID' and green for 'CREATE'. The 'BUILDING NAME' column for the 10th row contains the text 'Main HospitalMain Hospital'.

CONTROL ID	ALTERNATE TAG #	MAKE NAME	BIOMED TYPE	DEVICE TYPE	PARENT TAG #	FACILITY	BUILDING NAME	FLOOR CODE	AREA #
INVALID 10000	20000	FLUKE	Defibrillators			Premier City Hospital	Main Hospital	11th floor	100
CREATE 10001	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Administration Center	11th floor	101
INVALID 10002	20000	FLUKE	Defibrillators			Premier City Hospital	Business Office Building	11th floor	100
CREATE 10003	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th floor	100
INVALID 10004	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main HospitalMain Hospital	10th floor	100
CREATE 10005	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th floor	100
CREATE 10006	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	11th floor	100
CREATE 10007	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	11th floor	100
CREATE 10008	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th floor	100
CREATE 10009	20000	FLUKE	Defibrillators	1000		Premier City Hospital	Main Hospital	10th floor	100



# 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
- Initial focus on technician functions with plans to build a fully functional single mobile offering that appeals to various users

We plan to make our MVP focused on Technicians available by end of Q3 2023.



# Business Intelligence

- Embedded Logi reporting tool within WebTMA with the ability to create multiple kinds of visualizations
- Enhanced notification / alerting features
- Stock KPIs and dashboards provided by TMA

Previously planned for release in Q2, this feature is now slated for Q3.





## PM Load Balancing

Enhanced reporting on PM Workload across the year with an ability to make updates to PM generation dates.

This feature is currently in design and **has a planned release date by end of Q3.**



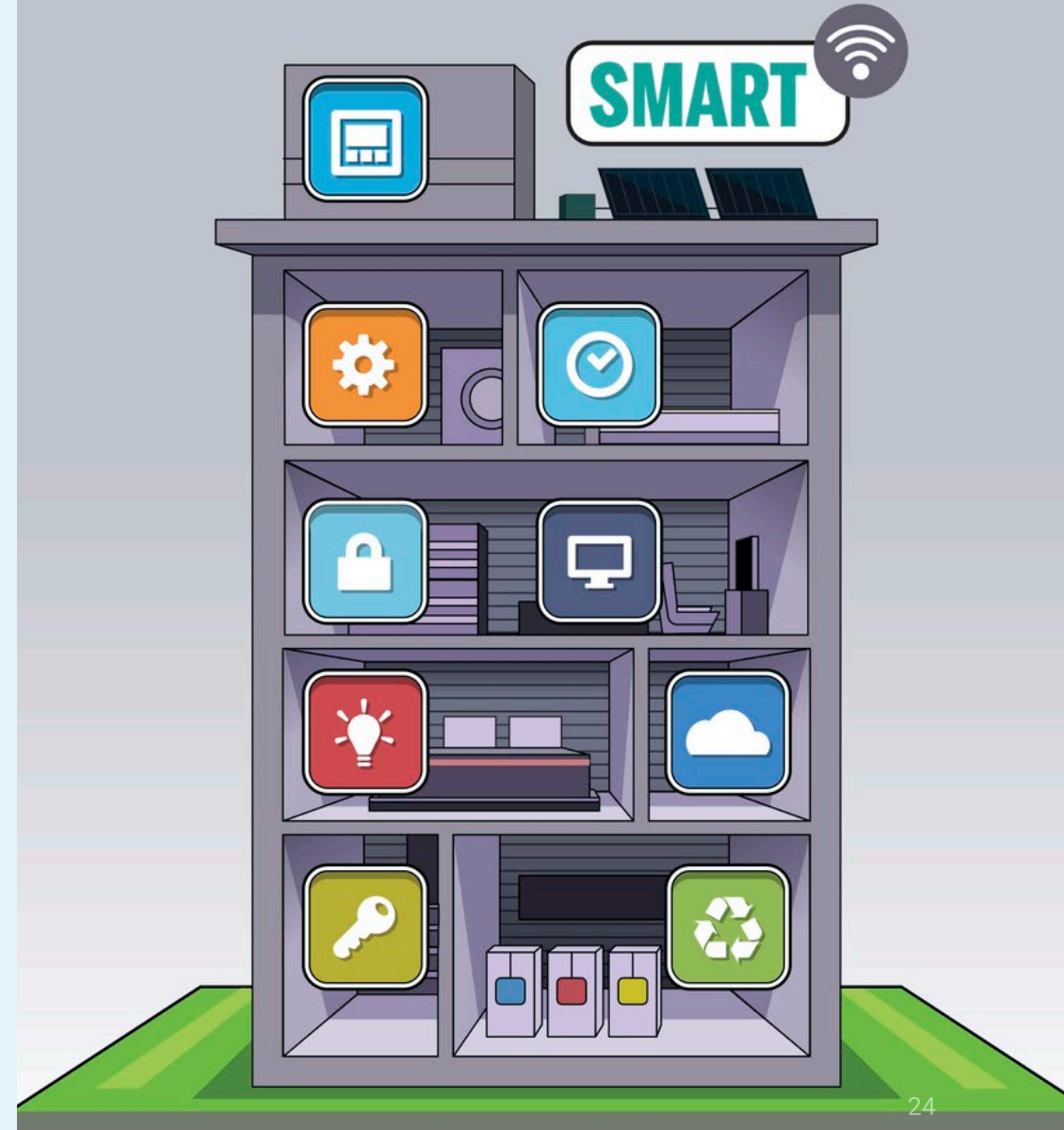
# IoT and Building Automation

**BACnet Integration:** Ability to import and map Building Automation devices to their corresponding equipment records in WebTMA. This will allow equipment runtime and/or fault alarms to trigger work orders in WebTMA. This integration gives administrators the ability to set up Predictive Maintenance regardless of their mixture of BAS hardware/providers.

**OBEM (Open Blue Enterprise Manager):** For clients using Johnson Controls' OBEM platform, WebTMA will be integrated allowing clients to use IoT data to trigger work orders when any fault alarms are detected.

Both of these are slated for **release by end of Q3.**

Source: <https://www.johnsoncontrols.com/openblue/openblue-enterprise-manager>

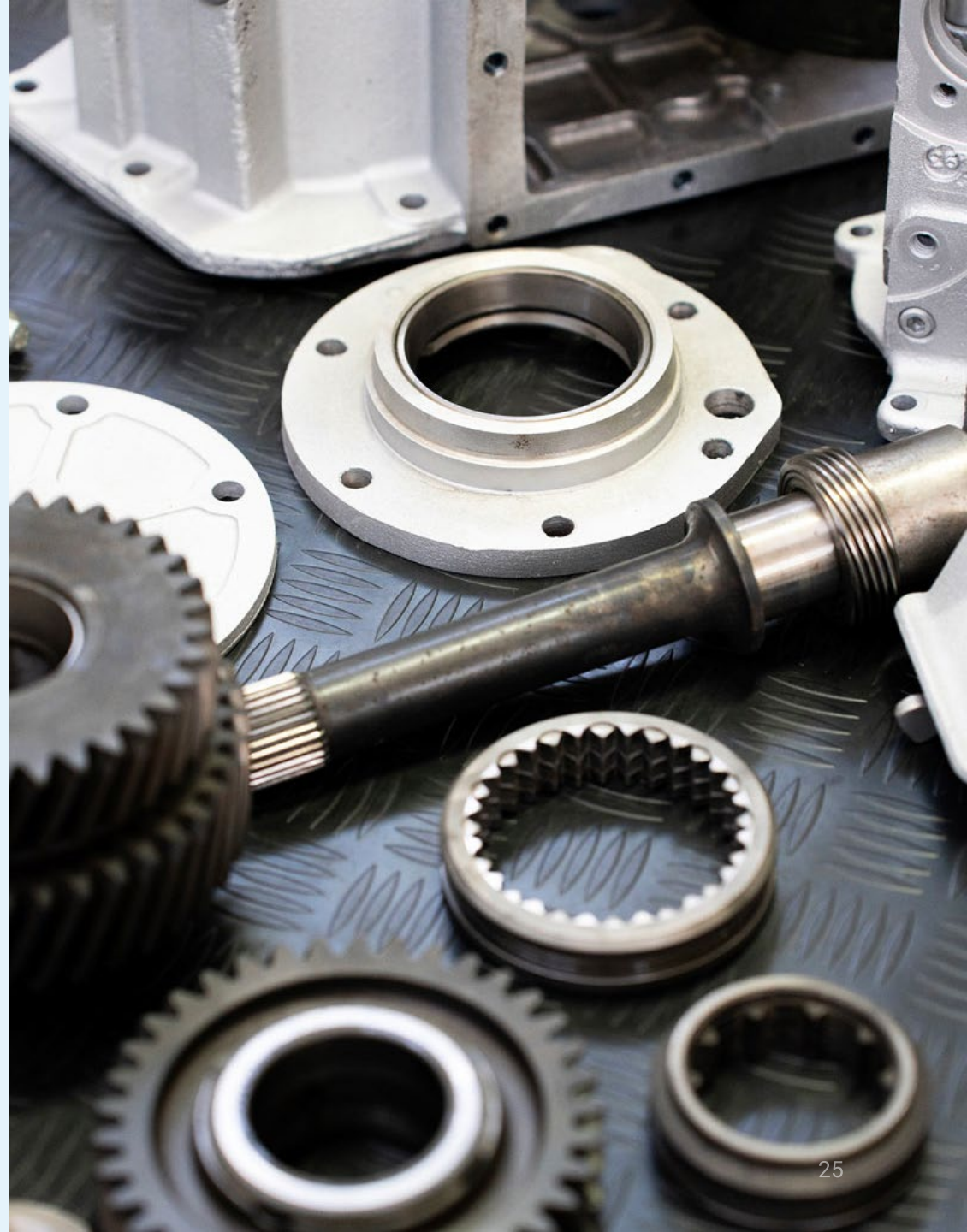


# Materials Management Enhancements

**Bill of Materials Groups:** Easy association of related parts to asset records by both Type/SubType or Make/Model. Functional specs are complete.

**Cycle Counting:** Ability to perform scheduled Cycle Counts and report on inventory variance using both desktop and mobile, ABC Part Classification. This feature is currently in design.

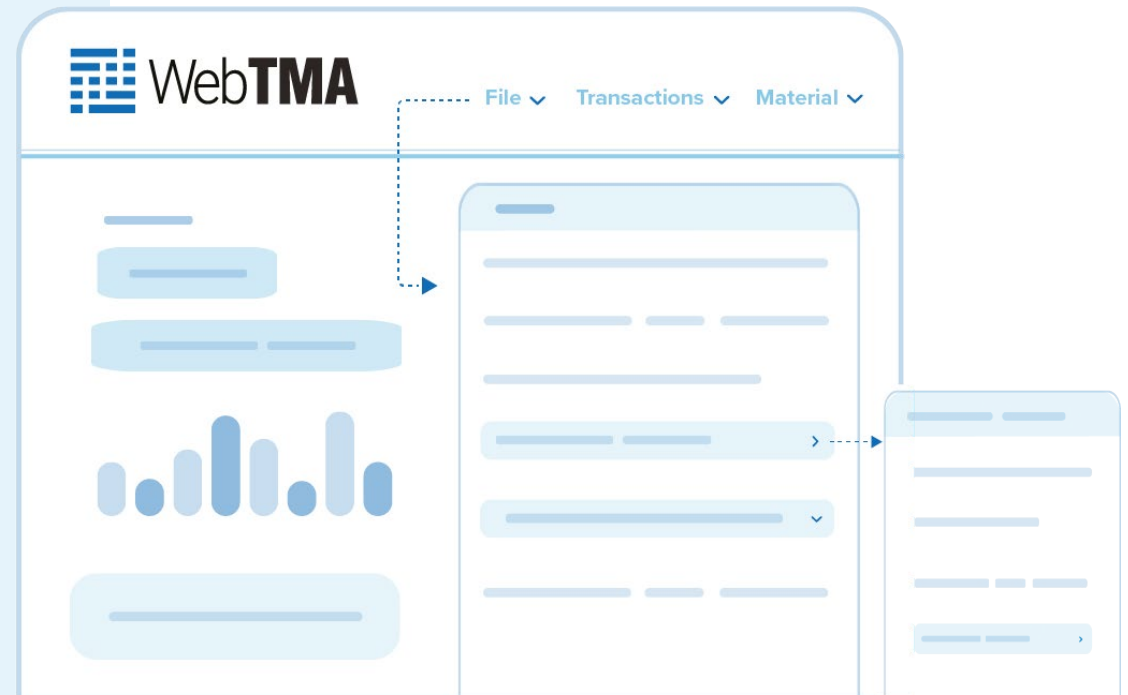
Initially planned for end of Q4, this development is **planned for 2024.**



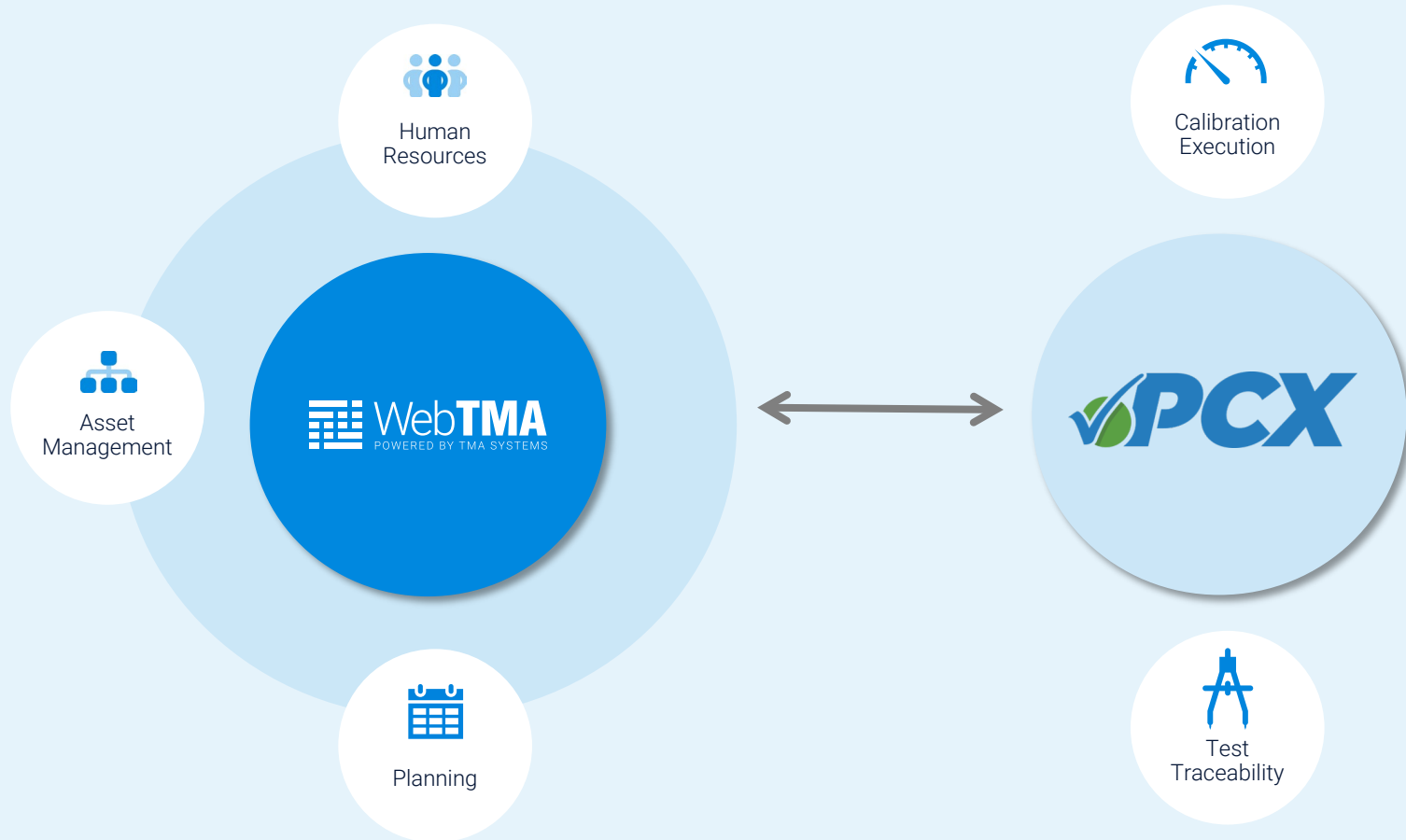
# Asset Hierarchy

- Intuitive “tree” view of location and parent/child asset hierarchy
- Configure the way your view your organization's assets whether it's by department, production line or physical locations
- Simple navigation to locations, equipment, and sub-assemblies
- Easy filtering of browse list views

Functional specs are complete. Planned for release in 2024.



# PCX / WebTMA Integration



A key piece of the long-term vision for PCX and WebTMA is to incorporate best-of-breed functionality in a shared platform.

Enterprise platform integration between the two systems would allow for the subset of maintenance management associated with calibration to be performed in PCX and allow for cross-system visibility.

We are currently defining the functional requirements and specifications for integrating the WebTMA and Prime platforms. We would love to work with client sponsors who have this need. Please reach out to us ([productmarketing@tmasystems.com](mailto:productmarketing@tmasystems.com)) if this would be of interest to you.

Target release Q1 2024.



# Thank You.

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



# Appendix.