

# On-Prem Installer Release Notes

January 2025

This document contains Release Notes for v7

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January 2025

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### January 2025

### Fiscal Year Change for Client Info and Work Order Window

Identity	Preferences Counters	Rental Preferences	Password	Modules	Linked			
	Name CSS TEST							
Prefe	Preferences							
Category								
•								
	Value							
Starting Month of Fiscal Year					July			
	01							

Fiscal Year	Client Into / Preferences
Additional Ref	
herited Longitude	07/01/2016 - 06/30/2017
ited Latitude	07/01/2017 - 06/30/2018
	07/01/2018 - 06/30/2019
	07/01/2019 - 06/30/2020
	07/01/2020 - 06/30/2021
	07/01/2021 - 06/30/2022
	07/01/2022 - 06/30/2023
Estimate #	07/01/2023 - 06/30/2024
imate Rental/Other	07/01/2024 - 06/30/2025
tal Estimated Cost	07/01/2025 - 06/30/2026
	07/01/2026 - 06/30/2027
	07/01/2027 - 06/30/2028
	1

Path: Transactions > Work Order > Records / Identity Tab **Summary**: The Fiscal Year settings in *Client Info / Preferences* have been changed. You can select a *Starting Month* and a *Starting Day* for your fiscal year settings.

A *Fiscal Year* field has also been added to the *Work Order* window in the *More Information* section. The date range has been included to make it easier for managers/technicians to select the correct FY option. This can be used in reports to show the Fiscal Year (budget year) the work was completed.

#### Details:

The format in the *Fiscal Year* field drop-down window follows this hierarchy:

- User / Preferences
- Client Info / Preferences
- Default MM/dd/yyyy (if neither User nor Client Info settings are present)

The drop-down options span eight fiscal years prior, the current fiscal year, and three fiscal years in the future.

Your System Administrator sets the Fiscal Year *Starting Month* and *Starting Day* in *Admin* > *Client Info* / *Preferences*.

The System Administrator can also make the Work Order *Fiscal Year* field required from *Admin* > *Form Attributes* > *System Form Attributes*.

### **Purchase Requisition Enhancement in Client Info**

CLIENT INFO							
🕂 Add	🖍 Edit	📫 Сору	🗙 Delete				
Identity	Preference	es Counte	ers Rental Preference:	s Password	Modules	Linked Acco	
	Name	e CSS					
Pref	erences						
Category							
► Miscellaneous							
	Mu	Iti-Currency					
	We	ebTMA CAD					
	✓ Purchase Requisition						
	D	escription			Value		
	R	equire Purchas	e Requisition Part		Gran	ted	

Path: Admin > Client Info / Preferences

**Summary**: You now have the option to save a Purchase Requisition record without adding line items. While the standard process includes item lines, some situations require that a record be completed later.

#### Details:

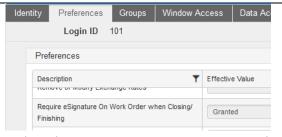
A new *Purchase Requisition* Category has been added in *Admin > Client Info / Preferences* where the option *Require Purchase Requisition Part* is **granted** by default.

If you want to save PR records without item lines, you can **Deny** this preference.

This is our November <u>Voice of the Customer</u> enhancement. We would like to thank the University of Alabama Birmingham for submitting this

enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

# User Verification (eSignature) for Finishing/Closing WOs



Path: Admin > User Management > Records / Preferences

Action Menu	
× Close WO	,
× Finish WO	
•	

Path: Transactions > Work Orders > Record	Path: <i>Transactions</i>	; >	Work	Orders	>	Record
---	---------------------------	-----	------	--------	---	--------

your login	
•••	
Re-Authenticate	

**Summary**: You now have the option to force User reauthentication when a work order is Finished or Closed.

This enhancement ensures that the logged-in user is the person who modified the Work Order record when finishing or closing and is used to keep your records in CFR compliance.

#### Details:

To invoke this change, grant the *Require eSignature* On Work Order when Closing/Finishing Preference (Admin > User Management > Records / Preferences) for users who are allowed to close or finish records.

On the work order, the *Finish Date* and *Close Date* fields are disabled for users with this Preference. An information icon instructs users to select the *Close WO* or *Finish WO* commands in the Action Menu.

The process is as follows:

- 1. Complete and *Save* the work order.
- 2. Click *Close WO* or *Finish WO* on the Action Menu in *View* mode to open the related flyout.
- 3. Complete the needed fields.
- Click Save on the flyout. The system refreshes and presents the Re-Authenticate login window.
- 5. Enter login credentials
- 6. Click the *Re-Authenticate* button.

*Quick Post* and batch close from *WO Browse* also require re-authentication. Currently it is not available on Mobile TMA.

This is also a <u>Voice of the Customer</u> enhancement. We would like to thank Röchling Medical for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

### Warehouse Copy Will Clone Records with Inventory

**Summary**: You have the option to make a copy of an existing Warehouse and clone all settings including

Identi	ty Repair C Cod		nventory							
	Parts									
	Code	Description	Bin Loc	Quantity	Value	Available	Mir			
	CB00001	Cab Hinge, Exposed, Overlay, Antique Brass		0	0.00	0				
	RL030124	RL SMOKE TEST 3/1	10	0	0.00	0				
	RL21624	Test 2/16		0	0.00	0				

Path: *Material* > *Warehouses* 

the *Part Inventory* Tab of the original – **except** the *Quantity*, *Value*, and *Available* columns on the Tab.

#### **Details**:

The process is easy. Open an existing Warehouse record and click *Copy* on the toolbar.

The resulting record is in *Add* mode and needs a *Code* and *Name*.

The new Warehouse is now visible on the *Material* > *Parts* > *Records* / *Location* Tab.

You can transfer quantities to the new Warehouse using *Material* > *Parts* > *Transfer Parts* if needed.

## **Open Distribution on Batch Closed WOs Now Has Alert**

Confirm × One or more Work Orders in your selection have an Open Distribution line attached. Would you like to:	<b>Summary</b> : If Quote, PR, or PO items that are marked for distribution to a Work Order have not been received and you attempt to close the Work Order, you are alerted that there are Open Distributions.				
Proceed: Clear all Distributions and close all Work Orders Close Only: Close all Work Orders and Distributions remain open Skip: Close all Work Orders selected without Distributions Cancel: Do not Clear Distributions and do not close selected Work Orders Proceed Close Only Skip Cancel	When you batch close work orders from the WO Browse window, the system now gives you an alert for open distributions in the same way it does when closing from the Work Order window.				
Path: Transactions > Work Order > WO Browse	While an alert has always shown in the Work Order window, this functionality has been added to the WO Browse window as well.				
Paul: Transactions > Work Order > WO Browse	Details:				
	When you close one or more work orders from WO Browse that have open distributions, you receive an alert and can select from the following:				
	<b>Proceed</b> : Clear all Distributions and close all Work Orders				
	<b>Close Only</b> : Close all Work Orders and Distributions remain open				
	<b>Skip</b> : Close all Work Orders selected without Distributions				
	<b>Cancel</b> : Do not Clear Distributions and do not close selected Work Orders				
	This is our October <u>Voice of the Customer</u> enhancement. We would like to thank Colgate University and University of Massachusetts - Amherst for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.				

### **Pending Charges Review/Dispute Export Lines**

Mark	Mark All Reviewed										
	Transaction Type										
	Work Order										
				Trans #	Date						
		EM-1350	10/09/2024 01:								
<											
	Export Selected Transactions Export All Transactions										

**Summary**: This new development for the *Pending Charges Review/Dispute* window gives you the option to export some or all the transactions.

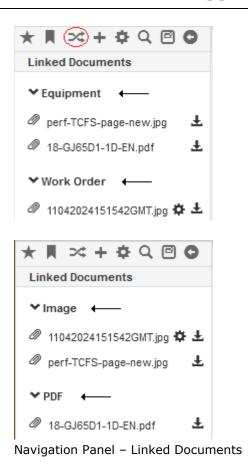
#### **Details**:

You can check lines on the grid to use the *Export Selected Transactions* button or you have the option to *Export All Transactions*.

Since there are different transaction types in the grid when exported to Excel, each type has its own worksheet. The same is true for the accounts.

#### Path: Accounting > Post Charges > Pending Charges Review/Dispute

## **Linked Documents Toggle View Feature**



**Summary**: A new icon 24 has been added to the Navigation Panel. The *Toggle Linked Documents View* icon is used to view by file type (image, .pdf, etc.) or by the record to which the files are linked.

#### Details:

The default view categorizes files by the record they are attached to. In the first screenshot at left, two files are attached to the Equipment record and one is attached to the Work Order record.

Click the  $\cong$  icon to view by file type. The files in the second screenshot now show two image files and one .PDF file.

### **Report Manager Reports Linked to Dashboard**

< Add Item	
Control Type	
Bar Chart Pie Chart Digital Dial G	
Configuration	<u>^</u>
Name* Special Reports Comments	
Add Reports Delete Selected	
Title	Comments Access
Path: Dashboard (Add New C REPORT WRITER	<i>ontrol</i> in <i>Edit</i> mode)
Active Report Category Window Toolbar	
Filter By Current Record Created By	TMA User

**Summary**: Most reports in Report Manager are now eligible for selection on the Dashboard.

#### **Details**:

This applies to reports that do not have a record set on the *Window Toolbar*.

Only reports that do not have the window toolbar selected on the report are available for selection in the dashboard.

### **MTTR and MTBF Report Added to Report Manager**

Report Criteria		
Start Date	on or after	
End Date	on or before	
RC Code	is equal to	▼ …
Facility Code	is equal to	▼
Building Code	is equal to	▼ …
Equipment - Type Code	is equal to	▼

Path: Reports > Report Manager / PM

**Summary**: A new report has been added to the PM category of the Report Manager to calculate the average time it takes to repair a failed component and the reliability of a component.

The report is titled *Equipment Availability with MTTR and MTBF*.

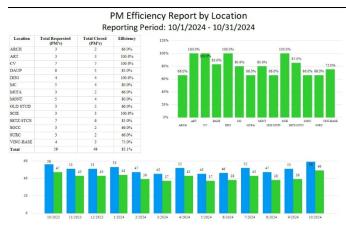
#### Details:

Based on posted downtime, the report shows in hours the Available Time, Uptime, Downtime, MTBF, and MTTR for a range of equipment in a Facility, Building, and Area.

In addition to *Start Date* and *End Date*, you have the option to limit the results based on Repair Center, Facility, Building, and Equipment Type. The report is identified as *Special*, which means it cannot be copied and recreated.

- MTTR Mean Time To Repair
- MTBF Mean Time Before Failure

### PM Efficiency by Location Report Added to Report Manager



Path: Reports > Report Manager / PM

**Summary**: A new report has been added to the PM category of the Report Manager to calculate and evaluate PM Efficiency by Location in WebTMA.

The report is titled PM Efficiency Report by Location.

#### Details:

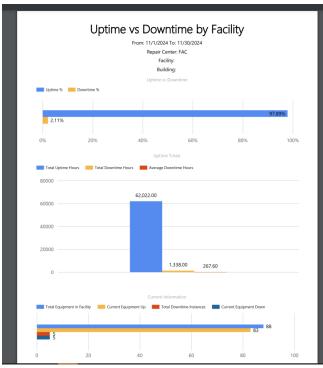
The report shows the total amount of PM's generated and the total completed within a given time range. It also displays your efficiency percentage by Building, and the totals by Building.

Also, it displays your average efficiency percentage for all Buildings within the selected time range.

In addition to *Request Date* and *Completion Date*, you have the option to limit the results based on Repair Center and Facility.

The report is identified as *Special*, which means it cannot be copied and recreated.

### Uptime vs Downtime by Facility Added to Report Manager



Path: Reports > Report Manager

**Summary**: A new report has been added to the Management category of the Report Manager to analyze Equipment Uptime and Downtime by Facility.

The title of the report is *Uptime vs Downtime by Facility*.

#### Details:

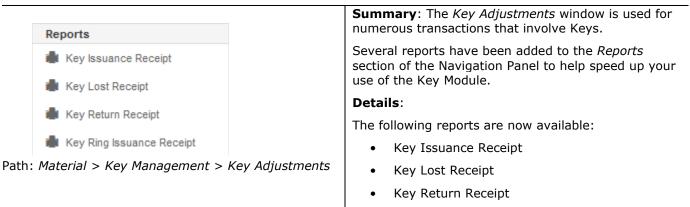
The report allows the selection of a Repair Center, a Facility, and/or Building and a Work Order date range. It displays the *Total Uptime %* vs *Total Downtime %* for the selected date range.

In addition to the percentages, it shows *Total Uptime Hours* for all Equipment in the selected RC, Facility, Building, the *Total Downtime Hours*, and the *Average Downtime Hours*.

Finally, it provides context by showing the *Total Equipment in the Facility*, the *Current Equipment Up*, the *Current Equipment Down*, and the *Total Instances of Downtime* in the selected date range.

The report is identified as *Special*, which means it cannot be copied and recreated.

# **Key Adjustment Reports Added**



• Key Ring Issuance Receipt

### **Search Functionality Added to Repair Center Assignment**

<b>A</b>	В
1 Lookup Type	Lookup Code
2 AreaType	Closet
3 AreaType	CONF
4 AssetType	Dormitory

#### Example of Spreadsheet Entries

O O localhost8080/app/repair-0	center-assignment	@@ 단 韓 ☆
		==
命 > Repair Center Assignment		
Repair Center A	ssignment 🕯	
REPAIR CENTER		
Biomedical Facilities $\sim$		
+ Upload		🛓 Download Template
	RepairCenterAssignmentTemp	_
	late.xisx 11.971 KB	×
STATUS	11 V LOOKUP TYPE 11 V	<b>Lookup соре</b> 11 17
STATUS		<u>соокия совс</u> 11 ⊽ 1000
	ID Area Type	
	10 AreaType 10 AssetType	1000
	10 AreaType 10 AssetType	1000 CHR

Path: Admin > Repair Center Assignment

**Summary**: The *Repair Center Assignment* window allows Administrators to upload a populated template with the Lookup Types and Lookup Codes that are accessible from within a selected Repair Center.

The results grid now includes Search, Filter, and Sort options like other grids in WebTMA.

#### Details:

The window is easy to use. Simply *Download Template* from the window. Note the specific format to use for the Lookup Type in the spreadsheet. Be sure your Lookup Type name is followed by the term 'Type' with no space.

Once you have completed the Template, select a Repair Center and click the + *Upload* button on the window to select your completed Template.

The resulting grid includes options to Search, Sort, and Filter.

STATUS IN I LOURUPTITE IN I LOURUPCODE IN I	STATUS	î↓	$\mathbb{Y}$	LOOKUP TYPE	î↓	Y	LOOKUP CODE	↑↓	Y	
---	--------	----	--------------	-------------	----	---	-------------	----	---	--

Click the Filter icon to see a search popup.

<u>.</u>	

### **Task Check Group Enhancement**

Task Check Entry				Summary: The Task Che convenient way to add se
Search Code			۹.	record. You can now sear Checks from the <i>Task Ch</i>
Filter Criteria				If you have numerous Ma
€Add Criteria 480	Group Criteria			Task > Master Check), th way to quickly locate the
Find				Details:
				A Master Check Code col
Code	Description	Check Type Code	SubType Code	results grid, and the chee
: Organizatior	1 > Task > 1	ask Check Gro	up	and SubType Code criter

**Summary**: The *Task Check Group* window is a convenient way to add several Master Checks to one record. You can now search and filter for Master Checks from the *Task Check Group* window.

If you have numerous Master Checks (*Organization > Task > Master Check*), this enhancement gives you a way to quickly locate the records you need.

A *Master Check Code* column has been added to the results grid, and the check *Code*, *Check Type Code*, and *SubType Code* criteria have been added to the drop-down list on the *Task Check Entry* flyout as well as the grid on the flyout.

In addition, a *Find* button was added in the *Filter Criteria* section to make it more accessible and intuitive to the user.

# Login URL Reminder Added



**Summary**: The feature that allows selected Users, Requestors, and Technicians to log in without using an ID and Password was revised earlier this year.

A reminder has been added to the *Login URL* flyout to remind administrators that the link expires.

#### **Details**:

The change resolved a security vulnerability, and the links expire in 24 hours.

Path: Admin > User Management > Records

### **AP Payment Window Now Includes UDF Section**

**Summary**: A *UDF* section has been added to the *AP Payment* window.

lde	ntity	
	General Information	
	Vendor Code Vendor Name Authorizer Authorizer Name Account #	
	Payment Info	
$\langle$	Payment Detail UDF	

Path: Accounting > Accounts Payable Invoice > AP Payment

If you need to track information that is not on the window, this feature allows you to add as many fields as needed.

#### Details:

You can set up your UDF fields from *Admin* > *Form Attributes* > *System Form Attributes*. Open *APPayment* and scroll to the bottom of the window where you can create, name, and establish the layout for UDF fields on this window.

### Mass Import Biomed Equipment Template Has Preferred RC

AQ	AR	AS		AT	AL
Repair Centers	Preferred Repair Center*	*S The will from	Repair be che	Center cked protection cked selection	that eferred

Path: Admin > Mass Import > Import Dashboard / Templates **Summary**: When using the Mass Import module for Biomed Equipment, you can now include a Preferred Repair Center if needed.

#### **Details**:

A new *Preferred Repair Center* column has been added next to the *Repair Centers* column. If a Repair Center is added to the new column, the *Biomed / Repair Centers* Tab will have a check mark in the *Preferred* column for imported records.

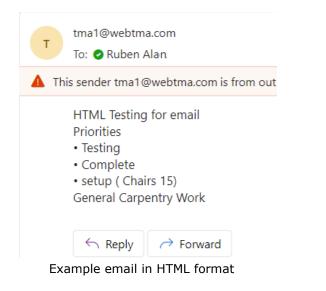
**Reminder**: Only one Repair Center can be entered in the Preferred Repair Center column.

### **Email Format Enhanced**

**Summary**: Email messages that were created as text-only are now available in HTML format.

#### **Details**:

Improvements were made to the HTML layout, and paragraphs are automatically formatted correctly.



### **Edit UDF for Accepted Inspection Findings**

UDF		
Congressional Year	2020	
Severity Code	A	~

Path: *Transactions* > *Request* > *Inspection Findings* 

**Summary**: By default, an Accepted Inspection Finding record cannot be edited. UDF fields are now an exception.

#### **Details**:

With this change, you can double-check that the inspection has been completed by entering data in your UDF fields.

### Survey Endpoints Enhanced in Swagger



**Summary**: In an ongoing response to our customers' requests, we continue to enhance the endpoints.

In this release, we have added platform endpoints to retrieve surveys sent as well as receive survey responses.

#### **Details**:

These new endpoints have been added to help retrieve data for the surveys that are sent and to see survey responses.

Having these endpoints available allows you to share survey results on public performance metrics or outside Business Intelligence (BI) tools.

<pre>SurveySent     {     transactionId     repairCenter     workOrderNumber     projectNumber     requestor     respondentEmail     createdDate     surveyCompletedDate }</pre>	<pre>&gt; [] &gt; []</pre>
SurveySentQueryResu data totalCount pageIndex }	ult v {

Swagger Schemas

### **Request Log Now Filters Tasks by Repair Center**

Request #				
Request Date*	03.12.2024	09:31 AM	G	
Request Type*	Phone		•	
Department Name			•	]
Repair Center Name	Facilities		•	<u> </u>
Account #			•	T
Source	_		•	<u> </u>
Task Code v	24015		•	
	Snow Removal		•	

Path: Transaction > Request > Request Log

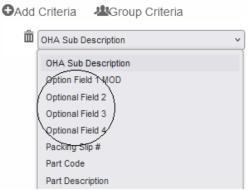
**Summary**: Those who use the *Request Log* window and are knowledgeable about Task Codes will find this new feature useful.

The selections in the Task Code drop-down are limited to the named Repair Center if one is entered.

#### Details:

If no Repair Center is entered on the *Request Log*, Users see Task Codes for all Repair Centers to which they have access.

### **Criteria Added to On-Hand Adjustment Search**



Path: Materials > On-Hand Adjustments

# **Contract Find Enhanced**

Contract Type	~
Active	^
Address Category	
Amount	
Award Amount	
Award Date	
Bid	
Change Order	
Comments	
Contract #	
Contract Status	
Contract Status Contract Type	

Path: Organization > Contract > Records

**Summary**: The Criteria drop-down list now includes *Contract Type* as a selection when you create your Contracts search.

#### **Details**:

With this addition, you can add *Contract Type* as a display column in your Contract queries.

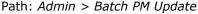
### November 2024

### Next PM Date Added to Batch PM Update Window

	Option			
		General		
Include		New Value		
	Active			
	Repair Center		▼	
	Work Order Type		•	
	Priority Description		<b>v</b>	
	Trade		▼	
	Department		•	
	Account #		<b>•</b>	
	Rate Schedule		• …	
	Warehouse Name		▼	
	Technician Code		•	
	Crew Name		•	
		Scheduling Options		
Include		New Value		
	Est. Time			
	Days To Complete			
$\overline{}$	Next PM Date			

		BAIGHTIM OF BAIL					
ieral Informat	ion						
Browse Sele	ction						
BIOWSE Sele	alon					$\sim$	
Item Tag	Est Time	Item Type	Repair Center Name	Department Name	Task Description	Next PM Date	
						$\sim$ .	
	Browse Sele	eral Information Browse Selection Item Tag Est Time	Browse Selection	Browse Selection Repair Center	Browse Selection Repair Center Department	Browse Selection Repair Center Department	

BATCH PM LIPDATE



**Summary**: A new option, *Next PM Date*, has been added to the *Batch PM Update* window.

#### Details:

This addition makes it easy to mass update multiple PM schedules when a client needs to shift a batch to a different date.

Select the lines to change, choose the Mass Update button, and use the new field, *Next PM Date*, where you can change the date.

This change also helps with Load Balancing your PMs.

This is a **Voice of The Customer** Enhancement. We would like to thank American Airlines, Tarian Group, and Johnson Controls for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

## **New PM Load Balancing Reports**



**Summary**: The PM Load Balance Report in WebTMA Report Manager is available to give you a view of your Preventive Maintenance program schedule throughout the year.

Using this report helps you ensure you have the correct amount of staffing to address PM work orders.

#### **Details**:

The projected hours are based on the estimated hours on the PM Schedule. Optional Report criteria is by Repair Center Name. Chart in the report provides a bar chart of work order counts that will generate in that month and the number of man-hours needed to

PM Counts by Priority	Total	Deferred		Emerge	ncy	Rou	tine		
Area	3		0		2		1		
Asset	1		0		0		1		
CEEquipment	1		0		0		1		
Entity	1		0		0		1		
Equipment	73		2		12		59		
Facility	1		0		0		1		
Vehicle	1		0		0		1		
Total PM Schedules:	81		2		14		65		
PM Counts by Trade	Total			pentry ervisor	Elect		HVAC Supervisor	Ma	itts Trade
Area	3	3		0		0		)	
Asset	1	0		0		0		)	
CEF !+	4	0		0		0		•	

complete based on estimated time. A further breakdown of PM work orders by Priority and Trade are listed in the grids.

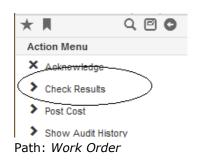
Additional PM Load Reports are available from *Reports* > *Report Manager*, select *All* > *PM*.

This is a **Voice of The Customer** Enhancement. We would like to thank CKS for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

### **Biomed Make/Model Linked to Mass Import Tool**

<b>Summary</b> : The Biomed Mass Import Template now fully supports Make/Model and Check-In Task functionality. The Make/Model features make it easy to default information for new Biomed equipment based on standards set at the Make/Model level (i.e., PM Schedule, manufacturer information, etc.). This is particularly helpful when you have multiple Biomed assets of the same make and model.
For example, if you purchase a quantity of identical defibrillators, you can establish the PM Schedule in Make/Model and assign it when you import the new item information. Subsequent purchases of that same make/model can be imported and automatically receive the same PM Schedule. If changes are needed to the PM Schedule, you can update the Make/Model record, and the change is reflected on all records associated with that Make/Model.
The process can also generate a <i>Check-in Task</i> from the Make/Model if it exists. If it is not part of a Make/Model record, the system looks to the Repair Center for the Check-in Task. If none is found, no Check-in Task is generated.
Details:
If you want PM schedules to be created for the Make/Model Biomed items being added, the following columns need to be present and valid. If any are not valid or not populated, the item is added but no PM Schedules are associated.
<ul> <li>The application will look up the Biomed Make/Model based on Make Name, Device Type, Manufacturer and Model #.</li> </ul>
Base PM Date
<ul> <li>Trade (This is an optional value in the import. If Make/Model PM schedule does not have a Trade, the Trade from the template is used.)</li> </ul>
Repair Center

### **Check Results Available for Technician Login**



**Summary**: When Technicians log in to WebTMA using the Technician role, the *Work Order* window Action Menu now includes *Check Results*. This grants the logged-in Technician access to Task Check Lists.

#### **Details:**

Technicians can record work done using the Check List. It provides an easy way to document their work.

## New OHA Fields Available in On-Hand Adjustments Report Form



**Summary**: The new optional fields included on the *On-hand Adjustment Entry* flyout can be included in your Report Writer reports.

#### **Details**:

The fields labeled *Option Field 1*, *Option Field 2*, etc. are available for selection from the *Add Criteria* drop-down list.

Path: *Reports > Report Writer* 

### **New Optional Fields for On-Hand Adjustment**

×	On-hand Adjustment	Entry	Save	Save & A
	Adjustment Code*			
	OHA Sub Description		<b>v</b> .	
	Part Code*		•	
	Part Description*			<u> </u>
	Warehouse Code			
	Warehouse Name		_	<u> </u>
	Unit Cost			
	Quantity/Available			
	Comment			
		1		
	Option Field 1			
	Option Field 2	[]		
	Option Field 3			
	Option Field 4			

Path: Materials > On-Hand Adjustments

**Summary**: You now have the option to add as many as four different text fields to the *On-Hand Adjustment Entry* window to capture additional information about the inventory adjustment transaction (such as additional detail on why it is being made).

The fields are hidden by default.

#### Details:

The fields are labeled *Option Field 1*, *Option Field 2*, etc. as illustrated at left but can be renamed using Text Management (*Admin > Text Management*). These fields are alpha-numeric with a limit of 255 characters.

Since these fields may not be needed by all users, they are hidden by default. You can go to *System Form Attributes* to make one or more fields *Visible*.

		SYSTEM FORM ATTRIBUTES							
+ Add	🖍 Edit	🏟 Сору	🗙 Delete	<b>K</b> First	< Prev	▶ Next	M	Last	🍓 Pi
Identity									
Win	dow								
	Win	dow Name	OnHandAdjust	ment					
Pag	es								
			Title						
	OH	A Sub Descrip	tion	OHSubTypeDes	scription	U	× .		
	χου Ο μ	tion Field 1		OptionField1					
	( Op	tion Field 2		OptionField2					
	Ор	tion Field 3		OptionField3					
	QP	tion Field 4		OptionField4					/
	or	Post-Adj Quant	ity	PostAdjustmen	tQuantity				
Path: /	Admir	ו > For	m Attri	ibutes	> Syst	tem F	orm	ו	
Attribu	ites (	OnHan	dAdjus	tment	– On-H	land			
	•	Entry)	2						

# Space Management Reject Pending Update Added

DWG TO DB COM	PARISON OF ROOMS AREA QTY -155 6	<b>Summary</b> : Using the Space Management – CAD integration (the AutoCAD add-on), you can view and export drawing updates for Room Numbers and SQF to a staging table in WebTMA.
Deleted Room	490 2 634 2	You now have the option to reject the imported data before committing the changes to the
		WebTMA database. Details:
ROOM STATUS NEW AREA OLD / 112A New Room 175	AREA	The drawing changes made are:
131A.         New Room         459           131         Deleted Room         -           151A.         Deleted Room         -           105A.         Area Change         152	444 46 754	<ul> <li>Add a new room in the drawing (WebTMA can create a new Area record)</li> </ul>
107         Area Change         410           107A         Area Change         133           112         Area Change         509           151         Area Change         121	441 116 690 70	<ul> <li>Remove an existing room in the drawing (WebTMA can inactivate the record)</li> </ul>
D101 Area Change 114 End of chart Space Management Comp DB)	152	<ul> <li>Change square footage for an Area in the drawing (WebTMA can update the SQF for the Area record)</li> </ul>
File - Transactions - Material - Accounting - Or	amzation + Admin + Reports + Halp + CAD IMPORT	After the drawing updates are exported to WebTMA, they remain in a staging area for approval before committing the changes to the database.
Fast Find - Search     Q.     Q.     + Add     > Edit       *     II     Q.     Identity     Identity       Action Menu		From the CAD Import window, authorized users can either:
> Reject Import Buildin	on Code test2 ort Time 11/04/2022 05:00 AM g Name bin or Code LV-031	<ul> <li>Import the new information to the database by clicking Import Areas on the Action menu</li> </ul>
Path: Admin > CAD Impo	rt	• <b>Reject</b> the pending changes by clicking <i>Reject</i> <i>Import</i> on the Action menu to remove the

**Reject** the pending changes by clicking *Reject Import* on the Action menu to remove the transaction

If an export was made in error, the pending transaction record is deleted, and no changes are made to WebTMA Area records in the database.

### **Request Log Security Enhancement**

Identity Preferences Groups	Window Access	Data Access	Mobile A	Access	Repair Centers
Login ID 101					Mixed
Request	[	Mixed	× 1	Mixed	~ [
Batch Validation		Add	~	Add	~
Inspection Findings		Full	~	Full	~
Inspection Findings Batc	h Validation	Add	~	Add	~
Request Browse		Add	~	Add	~
Request Log		Full	~	Edit	~
Time Manager	[	Add	× .	None Read	
Training	[	Mixed	× 1	1	
Work Order	(	Mixed	× 1	Edit Add/Edit Full	
				Not Deter	mined

Path: Admin > User Management > Records / Window Access

Path: Admin > User Management > Groups / Window Access

**Summary**: To tighten security on the *Request Log* page, new rules have been established. These changes ensure that the rules are enforced on both system windows and custom windows.

#### Details:

WebTMA looks at the user or group Window Access and applies the following rules.

Window Button	Requirement 1	Requirement 2
Accept	Edit on Request Log	Add on Work Ord
Convert to Project	Edit on Request Log	Add on Project
Convert to Audit	Edit on Request Log	Add on CP Audit (Capital Planning
Reject/Hold	Edit on Request Log	

As an example, to use the *Accept* button, a user or group must be granted *Edit* on the *Request Log* window **and** *Add* on the *Work Order* window.

### **Signature Detail for Lines in Key Adjustment Forms**

Date Due Date	^	<b>Summary</b> : When you create a new report in Report Writer, the <i>Report Criteria</i> drop-down list now
Ext. Account #		includes <b>two</b> Signature selections.
Key #		This applies when you use the Cignature feature for
Key Code		This applies when you use the Signature feature for
Key Description		applicable windows.
Key Holder		Details:
Key Holder ID		
Key Issued Deposit		On the Key Adjustment Form, the Signature criteria
Key Return Deposit Refund		pulls Signatures for the Header, i.e., one signature
Key Ring		for several lines.
Key Ring Tag #		The Circle true Date it establishes will be signature for
Payment Type		The Signature Detail selection pulls signatures for
PickUp Date		individual lines.
Quantity		Including signatures in a report may be needed to
Reference #		display the physical signature captured, for example
Secondary ID		when issuing or returning keys. The report provides a
Serial #		physical document for the key holder to retain.
Signature		physical document for the key holder to retain.
Signature Detail		
technician 1 ID		
technician 1 Name		
Work Order #	~	

Path: Reports > Report Writer / Identity Tab

### **Key Holder History Tab Enhanced**

Key	Holder II	D CA				Name	Chas Ab	ert
Histo	ry			/ /				$\frown$
	Туре	Transaction	Date	Ckup D	Due D	Descript	Serial #	Key Ring
	12	Issue Key Ring	24					EJKR1
	12	Issue Key Ring	14					JBKR1

Path: Material > Key Management > Key Holders / History Tab **Summary**: The Key Ring column on the Key Holders / History Tab now displays the *Key Ring Tag #*.

#### **Details**:

Previously, this column showed the Key Ring *Description*.

### Contract Window Offer # Field Now Editable

Contract #*	1		
Repair Center Code	EM	•	
Contract Type	Contract ID code	•	
Request Date	14/05/2024	ti i	
Award Date	14/05/2024		
Contract Status	Awarded	~	
Offer #			
Department Code	TMA Dept 01	•	

**Summary**: To allow more flexibility, the *Offer #* field on the *Contract* window can be edited even after a Contract is awarded.

#### Details:

WebTMA removed the restriction to assist clients who need to make modifications to the field. The *Offer #* can now be adjusted after the fact.

### **Pending Charges Review/Dispute Location Enhanced**

	PENDING CHARGES REVIEW/DISPUTE						
	All      Reviewed      Pending						
					$\frown$		
L Post Date	Debit	Debit Account	Completion Date	Action Requested	(Location)		
1/07/2024	100	1234		Front lobby doors are not functio	МН		
Path:	Path: Accounting > Post Charges > Pending Charges						

Review/Dispute

**Summary**: The *Location* column on the *Pending Charges Review/Dispute* window now shows the *Location ID*.

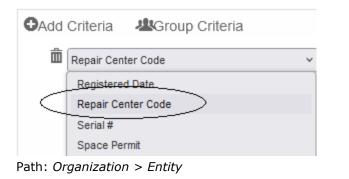
#### Details:

Previously, this column displayed the Location *Description*.

### **Criteria Added to Entity Window Selection**

**Summary**: A new criteria field selection is available on the drop-down selection list for the *Entity* window using Advanced Find (*Show the Search Panel*).

Details:



You can now choose *Repair Center Code* when making your criteria selections.

# Preference Label Change – Landing Page

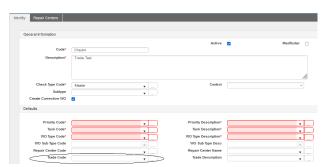
ntity	Preferences	Groups	Window Acc	
	Login ID	101		
Prefe	erences			
Desc	ription		T	
iPad	Inventory Access	•		
Land	ing Page			
	Admin > U	ser Manag	ement > Re	ecords /
	rences	oor Monor	omants C.	
	Admin > U. rences	ser manag	ement > Gr	oups /

**Summary**: When it was first introduced, the Landing Page was identified in *Preferences* as *Use New UI/UX*.

#### **Details**:

The label has been changed. To grant user or group access to the Landing Page, look for *Landing Page* in User or Group *Preferences* Tab.

### **Trade No Longer a Required Field for Master Check**



Path: Organization > Task > Master Check

**Summary**: Clients who use the *Create Corrective WO* option on the *Master Check* window and who also use the *Client Info / Preference* to *Force a Trade for Each Task*, were unable to change the Trade on the corrective Work Order.

#### **Details**:

This has been resolved by removing Trade as a required field on the *Master Check* window.

In addition, the Trade from the current WO is copied to the new WO that's being generated. This applies if the field is not populated. If populated, the system will use Trade selected.

### New Columns on Work Order Task Grid

Т	ask Information							
						$\frown$	$\sim$	
	Task	Task Description	Trade	Finish Date	Completion Date (	Resolution )	(Failure Code )	Cor
	12000	General Carpentry Work	Electrical Supervisor		07/28/2023 09:25 AM	$\smile$	$\sim$	
	12001	Construct/Build	HVAC Supervisor					

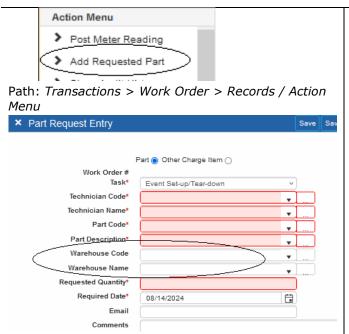
Path: Transactions > Work Order > Records / Identity Tab **Summary**: Multi-task Work Orders now include two new columns in the *Task Information* Section. The new columns added to the grid are *Resolution* and *Failure Code*.

#### Details:

These new columns give you at-a-glance information about Tasks that have failed as well as how they were resolved.

The feature helps ensure that a Failure Code has been entered, which is useful when closing and completing WOs.

### WO Part Request Enhancements Added to WO Action Menu



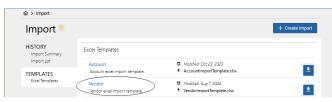
**Summary**: Adding Requested Parts to an existing Work Order has been simplified. Just select Add Requested Part on the WO Action Menu to open the Part Request Entry flyout with one click. When selecting the Part, you can also choose the Warehouse where the Part is stocked.

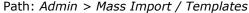
#### Details:

With the desired Work Order in *View* mode, click *Add Requested Part* on the Action Menu. The system automatically enables *Edit* mode, moves to the *Schedule* Tab, and opens the *Part Requested Entry* flyout ready for you to request needed Parts.

These enhancements provide easier navigation when requesting a Part and allow you to select the Warehouse where the Part is located.

#### Vendor/Manufacturer/Contractor Mass Import Now Available





**Summary**: A *Vendor* Template has been added to the Mass Import list of Templates.

#### **Details**:

You can import Manufacturers, Contractors, and Vendors using this Template, which can be useful in several ways. For example, when you build a new distribution center or add another campus. In some cases, our clients have separate Departments like Facilities and Housing. If these are merged, you can import data from one Department to another.

It is also a good way to update existing information such as addresses and contacts.

The Mass Import module is available for System Administrators to import new data or update existing data.

Full details about the module are found at Mass Import Module in this document.

### **Project Module API Endpoints Added**

Projects	^
GET /v2/Projects/{id} Get a specific Project.	<b>1</b> ~
PUT         /v2/Projects/{id}         Replace all data in a specific Project.	<b>1</b> ~
PATCH /v2/Projects/{id} Replace specified data in a specific Project.	<b>1</b> ~
DELETE /v2/Projects/{id} Delete a specific Project.	<b>1</b> ~
GET /v2/Projects Return a list of Projects matching provided optional criteria.	<b>1</b> ~
POST /v2/Projects Create a Project.	<b>i</b> ~
GET /v2/Projects/{id}/RepairCenters Return a list of Repair Centers linked to a specific record	<b>i</b> ~
ProjectTasks	^
GET /v2/ProjectTasks/{id} Get a specific Project Task.	
PUT         /v2/ProjectTasks/{id}         Replace all data in a specific Request.	â ~
PATCH /v2/ProjectTasks/{id} Replace specified data in a specific Project Task.	
DELETE /v2/ProjectTasks/{id} Delete a specific Project Task.	- →
GET /v2/ProjectTasks Return a list of Project Tasks matching provided optional criteria.	<b>a</b> ~
POST /v2/ProjectTasks Create a Project Task.	<b>a</b> ~
ProjectTypes	^
GET /v2/ProjectTypes/{id} Get a specific ProjectType.	<b>1</b> ~
PUT         /v2/ProjectTypes/{id}         Replace all data in a specific Project Type.	<b>1</b>
PATCH /v2/ProjectTypes/{id} Replace specified data in a specific Project Type.	<b>i</b> ~
DELETE /v2/ProjectTypes/{id} Delete a specific Project Type.	<b>i</b> ~
GET /v2/ProjectTypes Return a list of Project Types matching provided optional criteria.	<b>i</b> ~
POST /v2/ProjectTypes Create a Project Type.	<b>i</b> ~

**Summary**: Project API endpoints are now available to integrate with your external project management systems. The endpoints include Projects, Project Tasks, and Project Types. This will allow you to create, update and monitor project records in WebTMA from an external system thus reducing or eliminating repetitive data entry.

#### **Details**:

You have endpoints for Get, Put, Patch, Delete, and Post.

These new APIs are fully described in our Swagger documentation.

### **Keys Module API Endpoints Expanded**

**Summary**: We have enhanced our suite of API's by including several new Key-related API endpoints.

#### **Details**:

The windows included in this release are: Key Adjustments\*, Keys, Lock, and Key Holders.

GET /v2/KeyHolders/{id} Get a specific KeyHolder.	
PUT /v2/KeyHolders/{id} Replace all data in a specific KeyHolder.	
PATCH /v2/KeyHolders/{id} Replace specified data in a specific KeyHolder.	
DELETE /v2/KeyHolders/{id} Delete a specific KeyHolder.	
GET /v2/KeyHolders Return a list of KeyHolders matching provided optional criteria.	
<b>POST</b> /v2/KeyHolders Create a KeyHolder.	

The list of Key-related APIs includes the following:

Key

Key Access

KeyAdjWorkOrderTask

KeyAdjustment

KeyAdjustmentDetail

KeyAdjustmentSignature

KeyAuthorizer

KeyHolder

HeyHolderKeyRing

KeyHolderKeyRingKey

KeyInstanceSerialNumber

KeyTransactionSignature

The new Keys and Key Holder APIs are fully documented in our Swagger documentation here.

\***Note:** Key Adjustments are a *ledgered* system, that is, they do not set data. Rather they are a log of activity on that key; therefore, Swagger does not have Patch or Put.

### **Criteria Added to Requestor Window Selections**



**Summary**: Additional criteria field selections are now available on the drop-down selection list for the *User Management* > *Requestor* window using Advanced Find (*Show the Search Panel*).

#### Details:

Look for *Requestor Type* and *Title* to facilitate your search.

Path: Admin > User Management > Requestors

## **Criteria Added to Contract Window Selections**

OAdd	Criteria 📲 Group Criteria	
Ô	Contract Type	~
	_Contract Status	
$\langle$	Contract Type	
	Contract Value	

Path: Organization > Contract > Records

**Summary**: A new criteria field selection is available on the drop-down selection list for the *Contract* window using Advanced Find (*Show the Search Panel*).

#### Details:

Look for Contract Type to facilitate your search.

### September 2024

### Add Occupants from Area Window

entity Miso	: Depi	artment	Part Reference	PMs	Monitored Condition	Occupants	Total Viev	/ Cost	Rates	Custodial Info
Loc	ation ID	123-123						Area De	scription	Dormitory-12
Occupant	5									
Add Occu	nent									
Add Occu	pant									
Add Occu Name	pant		Title	Emai	1	Work Pho	one Depi	artment		Organizatio
			Title	Emai	1	Work Pho	one Depi	artment		Organizatio

Path: Organization > Areas > Records / Occupants Tab

**Summary**: WebTMA Plus clients now have the option to assign Requestors as Occupants from the Areas / Occupants Tab.

Previously, this action was limited to WebTMA Base clients.

#### Details:

In the past, WebTMA Plus clients were required to assign individuals from the User Management > Requestors window.

It is still true that when a Location is assigned from the Requestor record, the Requestor is automatically added to the Areas / Occupants Tab.

On the Areas / Occupants Tab in Edit mode, select the Add Occupant link on the grid to open the Occupants Entry flyout. Mark the desired check boxes and choose Add Selected. Once you save the record, the Occupants are added.

### Languages Supported in WebTMA 7

✓ Save X Cancel Identity Preferences C General Information	CLIENT INFO	Modules Linked Accounts	Cloud Storage Prov	Hindi, Punjabi menus, and n in text fields a field, Request
Name	* TEST	Archival Database Default Language	English	<b>Details</b> :
Contact Information Path: Admin	> Client Info / Ide	,		Your WebTMA language used users' preferr record or fron settings overr
Save X Cancel	USER MANAGEMEN	T Aobile Access Repair Centers	Managed Resources	<b>NOTE:</b> If you settings, log o again, you ca
First Name* Last Name* Initials*	101 101 101	Active Login ID* Password Password Confirm	✓ 101 ••••••	The following currently supp
Email Default From Email Phone # Fax #		Organization Unit URL Login Locked Out Force <u>Password Change</u> Preferred Language	Español	<ul><li>English</li><li>Germa</li></ul>
Path: Admin Tab	> User Manageme	nt > Record /	Identity	<ul><li>Spanis</li><li>Thai</li></ul>
				<ul> <li>French</li> </ul>

**Summary**: WebTMA now supports languages such as , and Vietnamese for default text labels, nessages. Words entered by your users are not translated (Comment field, Name ;, etc.).

Administrator determines the default d in the application; however, individual ed settings can be made from the User n the File > Personal Info window. These ide the Client Info selection.

change the personal or User record out of the system. When you log in n see the language change.

list shows all the languages that are ported:

- n
- h
- French (France)
- French (Canada)

					PEF	RSONAL	INFO	
~	Save	🗙 Cancel						
lder	ntity	Preferences	Defau	lts				
	Gen	eral Information						
		First Na	ame*	Tom				
		Last Na	ame*	Cat				
		In	itials	тс				
			mail					
		Preferred Lang	uage )	English			~	

Path: File > Personal Info / Identity Tab

- Portuguese (Brazil)
- Portuguese (Portugal)
- Chinese (Simplified)
- Indonesian
- Hindi
- Punjabi
- Hungarian
- Vietnamese

# **Biomed Mass Import Template Enhanced**

Import 🖄		
HISTORY Import Summary	Excel Templates	
Import List	Account	Modified: Oct 23, 2023
TEMPLATES	Account excel import template.	▲ AccountImportTemplate.xlsx
Excel Templates	Area	Modified: Jan 19, 2024
	Area excel import template.	▲ ArealmportTemplate.xlsx
	Asset	Modified: Nov 8, 2023
	Asset excel import template.	AssetImportTemplate.xlsx
<	Biomed Equipment	Modified: Aug 1, 2024
	Biomed Equipment excel import template.	BiomedImportTemplate.xlsx

Path: Admin > Mass Import > Import Dashboard / Templates Tab

**Summary**: The Mass Import Template for Biomed Equipment has new columns. This increases the number of fields available for import.

#### **Details**:

Look for the following new columns:

- Original PO #
- Status
- Software Version
- IP Address
- HIPAA Frequency
- HIPAA Comments
- Annual Rate
- Usage Flat Rate
- Owner Department
- Lease Expiration

### **New Key Adjustments and Locks Endpoints**

	Summary: Key Adjustment and Lock endpoints are
KeyAdjustments	now available. These APIs allow you to effectively manage access control and security within your
GET /v2/KeyAdjustments/{id} Get a specific KeyAdjustment.	facilities. They are fully described in our Swagger documentation.
GET /v2/KeyAdjustments Return a list of KeyAdjustments matching provided optional criteria.	Details:
	If you use any of the following types of software, you can use these APIs to connect with a broader range of services and enhance overall utility.
	Key Management Software

Access Control Systems

- Locksmith Dispatch and Scheduling Software
- Inventory Management Systems
- Customer Relationship Management (CRM) Software

The Key Adjustments API facilitates the management of key assignments and inventories. This is crucial for operational security and efficiency.

The Locks endpoint is focused on managing locks installed on doors and other access points.

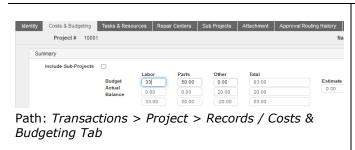
An additional endpoint for Key Adjustment creation will be available in a later release.

Click here to see lists of the API field names and corresponding default langstrings.

# Keys and Key Holder API Endpoints Expanded

<b>Summary</b> : We have expanded our Swagger documentation for Keys and Key Holder API endpoints and Schemas. This change provides comprehensive
documentation for Keys and Key Holders. They have been updated to document the full response schema.
Details:
The endpoints now map to CREATE (POST), UPDATE
(PUT and PATCH), DELETE, LIST (GET with no ID), READ (GET with ID).
These APIs are fully described in our Swagger documentation.
Click here to see lists of the API field names and corresponding default langstrings.
The langstrings are the default field labels. If your organization has changed the labels, check Admin > Text Management to verify the default name.

# **Edit Budgets for Projects with Estimates**



**Summary**: Projects with Estimates in WebTMA 7 now allow you to manually adjust the budget lines for Labor, Parts, and Other in most cases.

Previously, this action was prevented if the Project had an Estimate.

#### **Details**:

The following rules apply:

 If an estimate is attached and authorization is not required, you can edit the budget lines.

- If an estimate is attached and authorization is required but not yet approved, you can edit the budget lines.
- If an estimate is attached and authorization is required and **approved**, you **cannot edit** the budget lines.
- Budgets for Projects without an estimate can always be edited.

# Filter Parts by Vendor on PO/PR

Identity	Preferences	Counters	Rental Preferences	Password	Modules	Linked Acci	ounts	С
	Name	CSS TEST						
Pre	ferences							
		itegory						
		aterials Manage	ement					
	D	escription					Value	
	A	llow Purchase	Order Invoicing					
	A	llow Distributio	ns to Completed Work Or	der			Grant	ed
	D	efault PO Type	Used for Reorders					
	F	ilter Parts by Re	epair Center When Addin	g PO/PR Line	$\geq$		Grant	ed

Path: Admin > Client Info > Preferences

× Purchase Order Entry		Save	Save & Add	Save & Clone	) ( c
	Part 💿 Other	Item ()	OTP ()		
Account				<b>v</b>	
Part*				<b>•</b>	Ĵ
Part Description*				<b>•</b>	Ĵ
Quantity*					
Order Unit Unit Cost*					
Taxable?			<u>art by repair c</u> ilter part by Ve		
Budget Code		~		•	
Comment					٦
				//	1.
Save Sa	ve & Add S	ave & C	lone Cano	el .	

Path: Material > Purchase > Purchase Orders

**Summary**: Part selections for both POs and PRs can now be filtered by Vendor if a setting is granted in *Client Info / Preferences*.

#### **Details**:

Grant the *Filter Parts by Repair Center When Adding PO/PR Line* in the Materials Management Category of *Client Info / Preferences*. Be sure to log out and log in again to see the change.

Associate parts to the vendor(s) where they will be purchased by navigating to the PR or PO windows and choosing the *Vendor Code*.

When adding parts, the *Part* flyout now includes a check box to *Filter Part by Vendor*. If checked, WebTMA filters Parts by matching the Part Supplier to the PO or PR Vendor.

We would like to thank Abercrombie & Fitch for submitting this enhancement suggestion. Moving forward as we bring client enhancement submissions to reality, we are going to do a better job of recognizing the client who submitted the suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Login URL with Enhanced Security

**Summary**: You can send a Login URL link to selected Users, Requestors, and Technicians that allows them to log in without using an ID and Password.



Path: Admin > User Management > Records

Anyone who has access to the URL can launch the application; therefore, a 24-hour expiration has been applied to resolve a security vulnerability.

#### **Details**:

Any Login URLs you send to your users will expire in 24 hours.

### Signature Field Available in Key Management Report Forms

Cabinet Description	^	ports+	Help <del>v</del>		
Comments					
Created By				REPC	ORT WRITER
Created Date					
Date					
Due Date					
Ext. Account #					
Key #					
Key Code					
Key Description					
Key Holder			Ψ.		
Key Holder ID			<b>.</b>		
Key Issued Deposit			×.		
Key Return Deposit Refund					
Key Ring		L			
Key Ring Tag #					
Payment Type					
PickUp Date					
Quantity					
Reference #					
Secondary ID					
Serial #		-			
Signature	~	ia Synta	X		
Account #	Ý	contains		~) [Val	lue

Path: Reports > Report Writer / Identity Tab

**Summary**: When you create a new report in Report Writer, the *Report Criteria* drop-down list now includes a Signature selection. This applies when you use the Signature feature.

#### **Details**:

The selection is available for the following report forms:

- Key Adjustment
- Key Adjustment All
- Key Adjustment Detail

Including signatures in a report may be needed to display the physical signature captured, for example when issuing or returning keys. The report provides a physical document for the key holder to retain.

This can also be useful to provide receipts to departments that need physical copies with signatures.

### Hyperlink to WO from Key Adjustments

Identity	neral Information				-		<b>Summary</b> : You can add a Work Order reference when making Key Adjustments. The Work Order number is now hyperlinked to the Work Order Record.
	Date <u>Technician</u> justments	07/03/2024 HG			Batch # <u>Technician Name</u>	49 Harold Grant	The <i>Key Adjustments</i> window is used for transactions regarding Keys such as creating, issuing, and returning Keys.
F	Key# JS1	Type 8	Cabinet	Key Ring	Key Holder J S	Work Order # Qua 12-125	Details:
Path	: Material	> Key	Mana	gement	r > Key A	djustments	For ease of returning to a Work Order to make relevant updates, Key Adjustments records that include a Work Order number are now linked to the related Work Orders.

Click the Work Order number to open the Work Order record.

### **Custodial Template Bulk Copy Window Added**

Custodial >	Custodial Task
Dispatch >	Custodial Template
Training >	Custodial Route
Pending Authorization	Custodial Inspection Form
	Custodial Inspection
	Custodial Inspection Browse
	Custodial Labor Estimate
	Area / Template Mass Update
	Custodial Template Bulk Copy
1	

Path: *Transactions* > *Custodial* > *Custodial Template Bulk Copy* 

- Upload				去 Download Template
		CustodialTemplateBulkCopyTe	mplatedsx 17.441 KB	×
8	501	IRCE TEMPLATE CODE	NEW TEMPLATE CODE	
8	SOL VALE 25	IRCE TEMPLATE CODE	NEW TEMPLATE CODE	
		RCE TEMPLATE CODE		

Path: Transactions > Custodial > Custodial Template Bulk Copy

**Summary**: To reuse Custodial Templates for other buildings or areas, you now have a quick and easy way to copy a batch of them using the *Custodial Template Bulk Copy* window.

The copies can be modified to accommodate new spaces without having to make individual copies.

#### Details:

The *Custodial Template Bulk Copy* is a clean interface that is easy to follow.

☆ > Custodial Template Bulk Copy

Custodial Template Bulk Copy \*



Simply click the Download Template link on the right.

The resulting Excel spreadsheet has only two columns:

Source Template Code	New Template Code
25	A25
26	A26
27	A27

When you have completed and saved the spreadsheet, return to the *Custodial Template Bulk Copy* window.

Click the *Upload* button at the upper left of the window and select the spreadsheet you saved.

The window displays a line-item list of the *Source* and *New* Template Codes and indicates if they are valid. This gives you the opportunity to amend the spreadsheet in case of errors.

If all entries are valid, click the *Bulk Copy* button at the lower right of the window.

The new templates are now available, and the window is clear.

Go to *Custodial > Custodial Template* and review the list of Records to view and amend your copied Templates.

## Search Option Added to Task Check List Flyout

**Summary:** When you select *Add Check* on the *Task / Task Check List* Tab, the *Task Check Entry* flyout now includes search fields to help speed finding checks.

Task	Check Entry	Add Select
	Item Code	Item Description
	Ţ	Ţ
0	Air Comp-004	Check the operation of the condensate drain. While holding the discharge line of the drain, press and hold the test button for up to 2 seconds and feel for a short burst in the discharge line. If no burst is felt, change the condensate drain service uni
	Check1	Check 1
	Check2	Check 2

Path: Organization > Task > Records / Task Check List Tab The check items for Technicians to follow when they perform a Task are created from *Organization* > *Task* > *Master Checks*.

Once you have created the check list selections, they are available for selection from the *Task* Check *List* Tab).

#### Details:

The new search fields provide the option to search by either the Check *Code* or Check *Description*, where no search option was previously available.

This is helpful for clients that have many check items so they can quickly find the relevant items.

### **OTP Search Option for Purchase Requisitions**

× Find			
	Query Name	No Query Selected	
OAdd Criteria	AGroup Criteria		
Part Code		~) contains	~ [

Path: *Material > Purchase > Purchase Requisitions* 

**Summary**: OTP parts are now options in the *Find* window. If you have many OTPs, you can quickly search for those records in existing PRs by *Part Code*.

The Purchase Requisition module is used to request purchases for many reasons including One-Time Purchases (OTP) for materials or services.

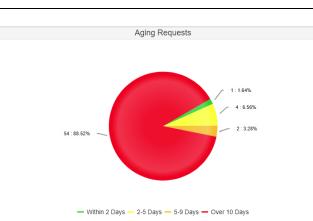
#### **Details**:

On the *Purchase Requisitions* window, choose the *Show Search Panel* icon from the Navigation Panel.

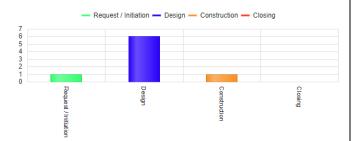
Select *Part Code* as a criterion on the *Find* flyout and enter the full or partial OTP number to see the Purchase Requisitions that include the related OTP records.

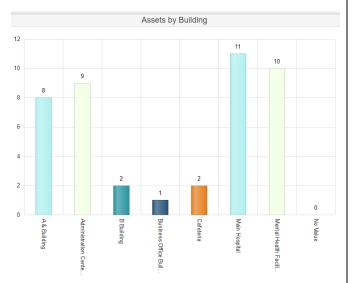
### July 2024

### **Executive Dashboard Enhancements**



Open by Phase





Summary: Based on the large number of requests from clients familiar with the v5 Dashboard functionality, we have added several enhancements to the v7 Dashboard. This results in a v7 Dashboard that has the best of v5 and the ease of use from v7.

#### Details:

**Responsive Content.** The contents grow or shrink with the size of the box and are centered within the box. Previously, the font was difficult to read because of the smaller size, and it had too much unused white space.

**Pie Chart Legend.** The legend was moved to the bottom from the right side. This allows the font to be larger and eliminates the cutoff that occurred with some configurations.

**Ability to Create Wider Dashboards.** If you want to display more controls on a single row and take advantage of larger monitors/screens, the Dashboard now provides a way to set the number of columns to display. This allows you to maximize the dashboard area and reduce or eliminate blank spaces on the right. To use this new feature, click *Manage Tabs* on the Action Menu and enter a number in the *Columns in Layout* column on the Tab Manager flyout. One column equals 150 pixels (px).

**Bar Chart Labels.** Bar chart labels are now displayed vertically by default. This eliminates the way horizontal labels overlapped, and many became impossible to read. With the move to vertical, we realized that large labels caused the label area to compress the bar chart area. To prevent this compression, we have set the maximum label length displayed to 20 characters. In the near future, we will add a configuration option that allows you to configure the label orientation (horizontal, vertical, diagonal).

**Segment Color Highlights for Digital Controls.** You can now define different colors based on the number returned in the control. This provides a quick visualization to let you know if everything is running optimally in your organization or if an area needs attention. As an example, if you have a control that displays the count of past due work orders, you can specify green for readings of 0-10, yellow when readings are between 11-50, and red for readings between 51-999,999. For the final range, be sure to select a value that can never be attained.

			$\sim$		
OAdd Tab			$\langle \rangle$		
	Tab Name	Visible	Auto Refresh	Columns In Layout	
1 0 + +	Closed WO Hours		/   `	20	'
1 0 + +	Work Control		0	10	
1 c + +	Trade Manager		0	10	
1 2 + +	Asset Data			10	
1 0 + +	Technician			10	
1 c + +	Director			10	

Action Menu: Manage Tabs - Auto Refresh Column

**Refresh Frequency**. With the last release, we introduced automatic refresh for Dashboard tabs that were checked. In the 4/30/2024 release, the refresh frequency was automatically set to every fifteen (15) minutes. In the current release, the refresh frequency has been changed to every five (5) minutes. In a future release, we will add configurability where you can better control the frequency of the refresh rate. While it does not autocycle through the tabs, this will be added in a future release.

### **Alert Based Work Orders with Smart Building Integration**



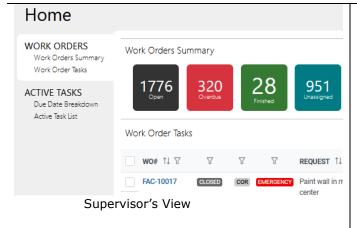
**Summary**: WebTMA 7 now integrates with BACnet to communicate with Building Automation Systems (BAS) or Business Management Systems (BMS).

The Smart Building Integration additional module is required to utilize BACnet integration.

#### Details:

For TMA clients that have BAS or BMS in use, BACnet monitors the readings and can communicate alerts to TMA to trigger work orders when a BAS or BMS alarm occurs.

# **Landing Page Revision**

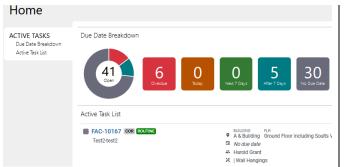


**Summary**: The Landing Page has two Tabs: Work Orders and Active Tasks. The *Work Orders* Tab is useful for Supervisors, but not other users. With this revision, only Technicians marked as *Supervisor* and selected as Supervisor for a Trade or Trades will see the *Work Orders* Tab.

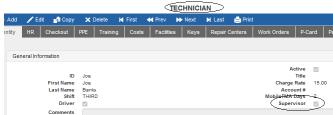
The change makes it faster for logged-in Technicians to see their Tasks without using extra clicks and ensures they do not have access to mass update functionality.

#### Details:

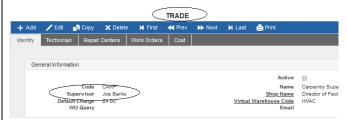
If the logged-in user has the *Supervisor* check box marked on their *Organization* > *Repair Centers* > *Technician* record, the *Work Orders* Tab is visible.



Non-supervisor's View

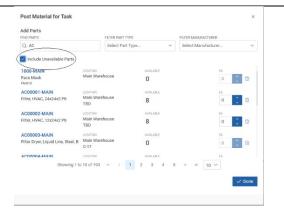


The work orders that display on the landing page are limited to Trades that the logged-in supervisor manages as designated from the *Organization* > *Repair Centers* > *Trade* record.



If the Supervisor wants to assign work from the Landing Page, they must have the assigned Privileges "Allow to schedule work to others" found in *Admin* > *User Management* > *Records / Preferences* Tab.

### Parts Available List Refined for Landing Page



Default View - Include Unavailable Parts

**Summary**: Material Costs can be posted to a Task from the *Active Tasks* Tab on the Landing Page, and, by default, the parts list includes unavailable parts.



The selection list that displays when you click the + *Add Part* button now offers an option to remove from view the parts that have an available count of 0.

#### Details:

We have added an *Include Unavailable Parts* check box on the *Post Material for Task* popup window. The box is marked by default.

When you clear the check box, parts that show an available quantity of 0 are removed from the list. This is a toggle action. If you mark the check box once more, the zero quantity lines reappear.

The screenshots at left illustrate the location of the check box and the different views.

Add Parts												
FIND PARTS FILTER PAI							FILTER MANUFACTURER					
Q AC Select Part Ty			irt Type.		~	Sele	ct Man	ufacture	r		~	
Include Unavailable Parts												
AC00001-MAIN	LOCATION			AVALAB	ε				EA		1	
Filter, HVAC, 24x24x2 P8	Main Wareho TBD	use		8					0	0		
AC00002-MAIN	LOCATION			AVALAB	8				EA			
Filter, HVAC, 12x24x2 P8	Main Wareho TBD	use		8					0	0		
AC00005-MAIN	LOCATION			AVAILAB	2				EA			
Hard Start Kit, AC Compressor,	Main Wareho D-21	use		5					0	0		
AC00006-MAIN	LOCATION			AVAILAB	E				EA			
Hard Start Kit, AC Compressor,	Main Wareho D-21	use		2					0	0		
RT00006-MAIN	LOCATION.			AVEC AD	E.				17.A			
Showing 1 to	o 10 of 169	<< <	1	2 3	4 8	5 >	>>	10 ~				
										🗸 Don	e	

No Unavailable Parts

If you have a long list, it may take a moment to revise the page.

### **Mass Import Template for Equipment Enhanced**

Z	AA
Risk Level	Trade
	Z Risk Level

**Summary**: The Mass Import Template for Equipment has new columns that accommodate users of the Make/Model feature. Make/Model makes it easy to establish records and add PM Schedules when you add large quantities of items of the same make and model.

For example, if you purchase a quantity of identical air conditioners, you can establish the PM Schedule in Make/Model and assign it when you import the new item information. Subsequent purchases of that same make/model can be imported and automatically receive the same PM Schedule. If changes are needed, you can update the Make/Model record, and the change is reflected on all records associated with that Make/Model.

#### **Details**:

If you want PM schedules to be created for the Make/Model Equipment being added, the following columns need to be present and valid. If any are not valid or not populated, the equipment is added but no PM Schedules are associated.

- One of the combinations below is needed. If Manufacturer, Model, and Equipment Type are present in the template, then the lookup for the Equipment Make/Model is based on Manufacturer and Model.
  - Make, Manufacturer, and Model
  - Make, Type and Sub-Type (if Sub-Type is used), or Type only
- Base PM Date
- Trade (if M/M PM schedule does not have a Trade, the Trade from the template is used)
- Repair Center

### **Time & Attendance New Criteria**

Display Column Selection Save						
	Column Name					
	Priority Code		^			
	Priority Description					
	WO Type Code					
	WO Type Description					

Path: *Transactions > Time Manager > Time & Attendance* 

**Summary**: To allow you to review labor hours by Work Order Types or by Priority, new criteria have been added to the Time & Attendance query for *WO Type* and *Priority*.

Date/Time ~
Approved Date
Approver
Date/Time
Hours
ID Code
Priority Code
Priority Description
Technician
Time Type
Trade
WO Type Code +
WO Type Description

#### Details:

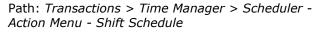
When you add these new criteria, you can do the following:

- 1. Click the Display Column sub-tab.
- 2. Select Add Column.
- 3. Check any of the boxes in the *Display Column Selection*.
- 4. Save the Query with a unique name.

You can use the saved Query in a Dashboard based on labor lines, for example, 'Number of Hours Completed by WO Type'.

## Shift Schedule Option for Scheduler

× Shift Schedule		Save	Са
Shift By Days* Shift To Date*	Save Cancel	)	



**Summary**: When unscheduled events occur which impact work order scheduling (illness, vacation, holidays, etc.), you can easily change technicians' scheduled assignments by a specified number of days or a specific date.

#### Details:

In the grid, check the desired technician lines and select *Shift Schedule* on the Action Menu.

Both Days and Dates can be moved forward or backward.

**Shift By Days.** Enter the number of days to move the work. A negative value shifts work to an earlier date.

**Shift To Date.** Select a date and time before or after the current date.

Click the *Save* button on the flyout, and then choose *Save* on the WebTMA toolbar.

### **Default Grid Records Returned Expanded**

**Summary**: Many clients have requested that we increase the number of records returned in the grids to reduce the number of pages you have to scroll through to see your data.

#### Details:

Most grids now display 25 rows compared to the 10 records returned in the past. We limited the records returned by default to optimize system performance.

Examples of grids updated to the higher record count include:

- Work Order > Labor/Parts/Other Charges
- Quick Post Cost
- Project > Task & Resources
- Purchase Order > Purchase Order Lines

See the example below of the Work Order Labor grid.

Technician	Task Description	Trade	Time Type	Date	Shift	Hours	Total Cost	Charge	No Charge	Tax Amour
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	1.00	15.00	15.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	2.00	30.00	30.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	3.00	45.00	45.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	4.00	60.00	60.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	5.00	75.00	75.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	6.00	90.00	90.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	7.00	105.00	105.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	8.00	120.00	120.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	9.00	135.00	135.00		
Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	9.00	135.00	135.00		

### **Task Code Character Length Increased**

Path: Organization > Task > Records

**Summary**: The length of Task Codes has been increased from a maximum length of 14 characters to 30 characters.

#### **Details**:

Several clients requested this change to make use of ASHRAE codes which can be up to 21 characters in length. We expanded to 30 characters to assure we had ample space to accommodate future Task Code configurations.

### **New Simple Work Order Format**

Reports Simple Work Order Work Order	<b>Summary</b> : Several clients asked for a simplified Work Order that could print/render more quickly from the <i>Work Order</i> window. You now have the option of a Simple Work Order or the original Work Order available in the Reports panel.
Work Order - Part Pick List By OHA	Details:
Work Order with General Inspections     Work Order with Signature	The new simplified Work Order layout is easier to read for basic work orders. Also, it is optimized to render more quickly. The new report is named <i>Simple</i>
Path: Transactions > Work Order > Records	Work Order.
	It has a significantly reduced number of fields on the printout to show only the most relevant information. It is designed with Technicians in mind who print Work Orders. The report allows space for handwritten notes, hours, comments, signatures, etc. The system renders the printout in one (1) second compared to

Signature Feature Added to Several Windows

× Signature Entry	Save	Clear
Save Clear Cancel		
Path: Material > On-hand Adjustments		

Path: Material > Parts > Transfer Parts Path: Material > Sales > Sales Order Path: Transactions > Quick Post > QP Material Path: Transactions > Quick Post > QP Cost Path: Transactions > Work Order > Records Path: Organization > Areas > RI Inspections (per line item in the grid) **Summary**: We have added the ability to capture physical signatures to several windows in the application.

five (5) seconds for the original work order printout. For cases where you need more details, the original

#### Details:

This feature is now available on the *Action Menu* of the following windows:

• On-hand Adjustments

Work Order report is still available.

- Sales Orders
- Transfer Parts
- Work Orders \*

Signatures can only be added in *Add* mode and cannot be edited or altered.

If *Client Info / Preferences–Materials Management* "Require Signature on Material Transaction" is granted, the following windows have a signature window on big Save.

- Quick Post Material
- Ouick Post Cost
- Work Orders \*

In the case of Room Inspections, line items can have

a signature added using the signature icon

Room Inspection

\* Work Order signatures can have two possibilities. The first is available from the Action Menu. The second occurs if *Client Info / Preferences–Materials Management* has "Require Signature on Material Transaction" Granted, then the system will force a signature after big Save **when a Material Cost is added**.

### **UFI Export Date Now Uses 24-Hour Format**

Path: Accounting > UFI > UFI Export Data	<b>Summary</b> : The date format has been changed from HH to HH24.
	Details:
	Some Oracle database versions were having difficulty processing the date/time format used by the UFI application. They required the 24-hour format. If you export UFI data to an Oracle Database, the new date format will be applied. SQL Server integrations remain unchanged.

### **UFI Segment Validation Feature Added**

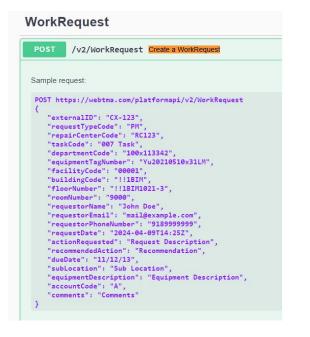
Path: Accounting > UFI > UFI Segment	<b>Summary</b> : The UFI Segment entry now checks to confirm that the account number entered is valid. This helps avoid failures in the interface due to mistyped account numbers.
	Details:
	When you enter data for the account, the system checks to verify if it is a valid entry. If invalid, you are alerted.

### **Work Request API**

**Summary**: A new, easier to use, Work Request API has been added to our API suite. This API is designed to accept system codes rather than database ID's for most of the lookup fields available for the creation of a Work Request (Service Request). The current Work Request API requires multiple API calls to look up database IDs for fields like Request Type, Repair Center, Facility, Building, etc.

The new API option allows clients to pass the system visible codes instead of the database ID. This is a new API (additive) and will not replace the existing API (Requests). Any client using the current Requests API can continue to use that API as is.

#### Details:



**WorkRequest.** The new WorkRequest API is fully documented in our Swagger documentation.

This new API is easier for clients to consume and requires fewer API calls. This API is used to create (Post) and obtain status (Get) for Work Requests (Service Requests).

T /v2/WorkRequest/find Get Request information.

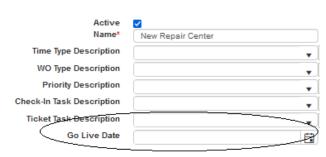
Retrieves request information using a supplied query parameter. Using Externalld or TMARequestNumber or TMAWorkOrderNumber. In that order. Only one parameter should be supplied. Sample requests:

GET https://webtma.com/platformapi/v2/WorkRequest/find?externalID=CX-123

GET https://webtma.com/platformapi/v2/WorkRequest/find?TMARequestNumber=RQ-1

GET https://webtma.com/platformapi/v2/WorkRequest/find?TMAWorkOrderNumber=W0-1

### **Go Live Date for New Repair Centers**





**Summary**: A *Go Live Date* field has been added to the *Repair Center / Identity Tab General Information Section*. It allows you to add an effective date for Make/Model PMs when you add a new Repair Center.

This is useful for clients that set up a new Repair Center in advance of using it. When you add a new Repair Center to accommodate a new department or location, for example, a date in this field prevents PMs from being generated before they are needed.

#### Details:

The date is only used when Make/Model creates new PM schedules. It will not be used for or impact manual entries or existing schedules.

The date selected in this field prevents PMs from being generated until after the *Go Live Date*. For example, if you have a monthly PM on an item and the Go Live Date is 8/1, rather than setting the PM next date to the date the record is created, the PM date is pushed to 8/1 to align with the Go Live Date. Once the date is reached, it is for information only.

## Billing Review/Dispute (WebTMA Plus) Enhanced

/la	ark All Reviewe	d										
	Account			Total Accou	Total Account Debit							
4	1234			2469873.9	2469873.9							
			Transaction	Trans#	Date	SL Post Date	Debit	Completion Date	Action Requested	Locatio		
	Reviewed	Dispute	Work Order	AT-1150	02/13/2024	05/20/2024	2469394.05	12/01/2000 10:48 AM	TEST	Summi		

Path: Accounting > Post Charges > Pending Charges Review/Dispute **Summary**: Authorized users or requestors can review and dispute charges related to account transactions based on Department records from the *Pending Charges Review/Dispute* window.

The Sub-Ledger Browse form now has an additional column.

#### Details:

If your System Administrator has performed Review/Dispute Administrative Setup, you can create a Batch Job to *Post Charges to Sub Ledger* that allows you to review the charges and dispute questionable items.

The *Account View* section of the window now includes the *Location* column to save you time when reviewing the records.

### **Contracts Window Department Field Added**



Path: Organization > Contract > Records / Identity Tab **Summary**: You can award contracts to outside contractors after a bid process. Information about the Contract is recorded on the *Contract* window.

#### Details:

The *Department Code*, a new field on the *Identity* Tab, helps you identify the Department associated with the contracted work. This is an elective field.

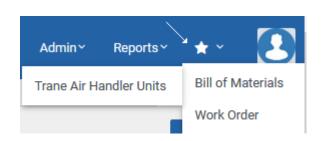


## **Custom SQL Window Added**

*			<b>Summary</b> : WebTMA v7 now includes the <i>Custom</i> <i>SQL</i> window. Use Custom SQL to copy standard			
Records	Identity User Access G	iroup Access				
% Contractor WO	General Information		System Queries or write and test your own SQL			
% PM Complete			queries for the Executive Dashboard.			
% PM to Total Cost	Name Description					
% Proj Due Compliance	Default Control Type Query	Numeric Readout select currvalue, priorvalue, case when priorvalue = 0 then 0 else	In use, your users can view a data set represented			
% Sched Compliance		convert(decimal(18,4), (currvalue - priorvalue) / (priorvalue * 1.0) *	on a graph, such as the data for a segment of a pie			
% Unplanned Work		100) end percentage from (select sum(isnull(currvalue, 0)) currvalue, sum(isnull(priorvalue, 0)) priorvalue from (select	chart. By applying a drill-down query, you can click			
% WO Comp <= Est % WO Comp > Est		count(proj.proj_pk) currvalue, 0 priorvalue from f_projectFile proj where proj.proj_requestDate >= @gkCurrYearStartUTC union all				
% WOs Unestimated	Drill Down Query		on a section and display a list of the underlying data			
Cost/Sg Ft By Building			in tabular format.			
Direct Hours						
Emergency Work Order %			Details:			
Hours By Repair Ctr	System Query Window Name					
Hours By Shop	Wildow Harre		To enable the custom SQL window for your on-			
Indirect Hours			premise environment, click here.			
Inventory Shrinkage						
Open Projects			Once custom SQL is enabled for your site, a new			
Open Work Orders			custom SQL can be created by going to Admin >			
Open WOs > 30 Days						
Open WOs > 60 Days Open WOs > 90 Days			Custom SQL and copying an existing or adding a new			
Open WOs By Building			Custom SQL following the rules outlined here.			
Open WOs By Department						
c 1 2 x			Your custom queries have several restrictions to			
Path: Admin >	Custom SQL		protect you from malicious users that have SQL skills,			
	-		for example, the term 'exec' is on the list of			
			unacceptable keywords. The term will be screened			
			out of any query and result in an error. In addition,			
			all queries must start with SELECT and must be			
			tested. If you have not clicked the <i>Test Query</i> button,			
			an alert reminds you.			
			,			
			Queries are listed in the Records section of the			
			Navigation pane.			
			System queries are identified by a mark in the			
			System Query check box below the Drill Down Query			
			field. System queries cannot be edited.			

Full details about Custom SQL are available here.

# Favorites and Bookmarks Extended to New UI/UX



Summary: As WebTMA continues to make the user interface easier to use, the Bookmark and Star icons are now available on the New UI/UX interface.

Details:

A Bookmark  $\bowtie$  icon is available to mark individual New UI/UX records.

The Star icon is visible on the New UI/UX menu bar with a drop-down of Favorites and Bookmarks set throughout the application.



	File*	Transactions Y Mat	erial ~ Accounting ~	Organization ~ Admir	n≚ Reports≚	Help~ 1	•
Bills of Mater	ials *						+ 1
T Clear					Q Search	h keyword	
NAME 11 7	CODE 11 7	ACTIVE 11 7	CREATED DATE 11 7	MODIFIED DATE 11 V	PART COUNT	ITEM COUNT	
Dodge Ram BOM Group #2	RAM-GRP	Yes	10/20/2023	01/05/2024	6	7	
Ford Focus BOM Group #1	FOCUS-GRP	Yes	10/20/2023		3	2	
JBoM Group	JBoM	Yes	10/23/2023	10/23/2023	3	61	

Path: Material > Bill of Materials

Summary: The *Bills of Materials* window is an easy way to associate needed Parts with many items at one time. The Table View has been revised to replace certain columns and add new columns for more information. You also have the option to Sort and Filter each column.

Details:

Look for the  $1 \nabla$  icons in the headings for the following columns:

- Code
- Name
- Created Date
- Modified Date
- Part Count (new)
- Item Count (new)
- Active (new)

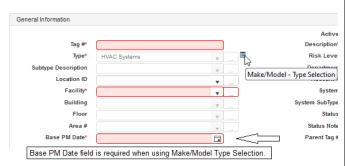
### **Audit History View Added**

Summary: The Audit History View is now available to help simplify your reporting process.

Details:

This is a view to access when you build your own reports using the report writer application of your choice.

### **Equipment Record Design Change for Make/Model**



Path: Equipment > Records / Identity Tab

Summary: The Make/Model feature in WebTMA allows clients to create templates for equipment management. This allows for more efficient standardization of PM schedules, parts list, costing, life expectancy, SOPs, and documentation.

The workflow process on the *Equipment* window has been revised for ease of use in assigning Make/Model and creating PM schedules. The *Base PM Date* field has been moved, and a *Select Repair Center* flyout has been added. You can now make all these selections from the *Equipment / Identity* Tab.

Details:

× Sele	× Select Repair Center					
	Repair Center Code*					
	1		•			
	SGTBEL	'	^			
	SurveyTest		]			
	TMA					
	TRP		~			

Previously, the *Base PM Date* was in the *Dates* section. It is now in the *General Information* section.

When you select a Make/Model *Type*, the *Base PM Date* field becomes required if the Make/Model has PM schedules.

An entry in the *Base PM Date* field triggers the following alert:

tma.tmas.com

When a make/model is linked, populating the base PM Date will create PM schedules based on the make/model and risk level. Continue?



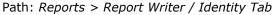
If the record does not have any linked Repair Centers, click *OK* on the alert to open the *Select Repair Center* flyout.

When you choose and save a Repair Center on the flyout, the RC is added to the *Equipment / Repair Centers Tab*.

If the Make/Model / PM record has no RC, it defaults to the selected RC.

### **Report Writer – Report Criteria Syntax Link Added**

Report Criteria	
OAdd Criteria	Criteria Syntax
4 📋 🖾 🔘 OR	
Completion Date	✓ on or after today ✓
Completion Date	✓ yesterday ✓
Dropdown Joe	<ul> <li>✓ is not empty</li> </ul>



Summary: You now have a way to confirm that you have structured your query accurately to achieve the desired results. When you add Report Criteria to your report, you can click a link to display the Syntax of your criteria.

Details:

The *Criteria Syntax* link is available in *View*, *Add*, or *Edit* mode.

Click the link to open the *Criteria Syntax* flyout to see the syntax.

### **Requestor Login – Request Status Browse Date Range Added**

Summary: You now have a way to select the time frame of records you want to see in Requestor Login Status Browse. Before this change, the system could time out while it attempted to load all records. The *Work History* grid now includes fields to set the time frame for viewing and reporting.

Details:

٥						
				6	5	51
				Open	Finished	Closed This Year
Vork History	r					
	Time Fr	rame	Last 365 Da	ys	~	
	Start	Date	04/06/2023			
	End	Date	04/05/2024			
Request #	W	lork Orde	r #	Request Date	Action Requested	Facility
202493				12/20/2023 08:29 AM	test	
202486				12/15/2023 09:55 AM	test	129876
202485				12/15/2023 09:43 AM	test	129876
202482				12/15/2023 09:40 AM	test	129876
		-				
		2	Last 3			~
Start [	Date		Last 3			~
	Date			/		~
Start [	Date		Today	/ rday		~
Start [ End [	Date		Today Yester	/ rday Veek		~
Start [ End [	Date Date		Today Yester This V	/ rday Veek Veek		~
Start [ End [	Date Date		Today Yester This V Last V	/ rday Veek Veek Month		~
Start [ End [	Date Date		Today Yester This V Last V This N	/ rday Veek Veek Month Month		~
Start [ End [	Date Date		Today Yester This V Last V This N Last N	/ rday Veek Veek Month Month Year		~
End	Date Date		Today Yester This V Last V This N Last N Last Y	/ rday Veek Veek Month Month Year		~

The default interval is the *Last 30 Days*, but you have the option to select any of the options illustrated in the screenshot at the left.

You can also search up to one year of historic data, and you can determine the year to be searched. If you need to see, for example, FY 2020-2021, just enter a *Start Date* of 07/01/2020 and *End Date* of 06/30/2021.

Pending Request results are also limited to the specified range.

### **UFI Export Date Default Changed**

Path: Accounting > UFI > UFI Export DataSummary: If a date format is not set up for the UFI<br/>Template, a new default is applied. Oracle databases<br/>expect the 24-hour format illustrated below.Details:When you do not set up a date format for the UFI<br/>Template, the output for flat files and SQL Server will<br/>default to the following 24-hour format:<br/>yyyy-MM-dd HH:mm:ss (example: 2024-04-04<br/>17:05:37)

### Mass Import Template for Fuel & Oil

Path: Admin > Mass Import > Dashboard	Summary: In ongoing support for our Mass Import tool, another template has been added: Fuel & Oil.
	Details:
	Fields found on the <i>Fuel &amp; Oil</i> window are available for completion on the Excel spreadsheet, including

*Meter* and *Odometer* entries. Six fields, such as Ticket # and item Tag # are required.

The Mass Import module is available for System Administrators to import new data or update existing data.

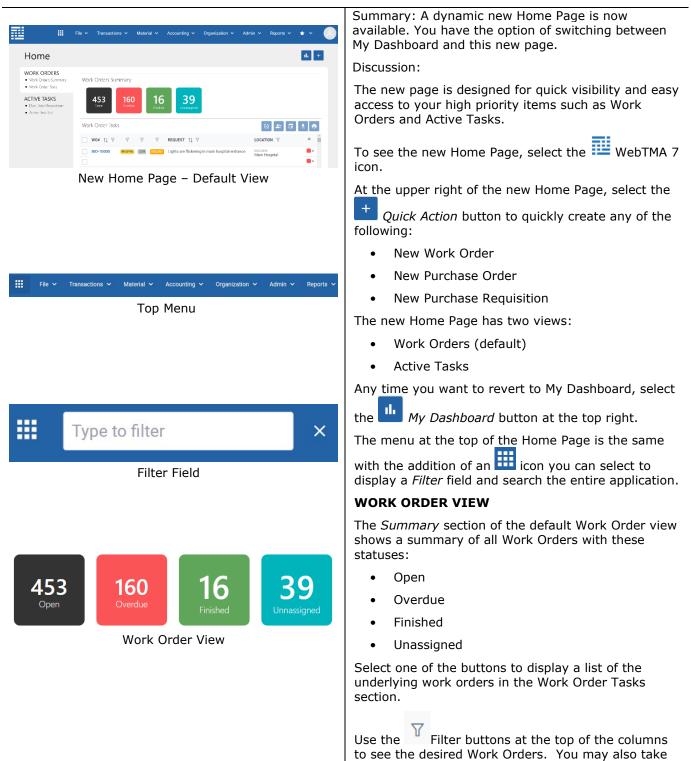
Full details about the module can be found at Mass Import Module on page 47.

# **Signatures Added to Key Adjustments**

× Signature Entry Save Clear C	Summary: Signatures can be used to capture a physical signature in an electronic format when you issue keys. With a signature, users acknowledge their key-holder responsibilities specified by your organization. In this release, you have the option to
	add a hand-written signature to Key Adjustment transactions.
	Other modules that qualify for signatures will be available in the next release.
	Details:
Save Clear Cancel	The signature can only be added in <i>Add</i> mode and cannot be edited or altered.
Path: Material > Key Management > Key Adjustments	For a Key Adjustment that qualifies, use the Signature button for each line item or Signature on the Action menu.

### March 2024

## New Home Page User Interface (UI)



action by marking the check box on a Work Order(s) and choosing one of the following buttons from the top right of the list:



Assign Technician(s): Assign a technician to the WO

**Update Due Date:** Update the Due Date on the WO





Print: Print the WO

#### ACTIVE TASKS VIEW

The Active Tasks view shows a *Due Date Breakdown* and an *Active Task List*.

In the *Due Date Breakdown* section, you see all your active tasks categorized by the following statuses:

- Overdue
- Today
- Next 7 Days
- After 7 Days
- No Due Date

Select any of the buttons to display only those items in the *Active Task List* below.

Select the buttons at the right of a line item to:

**Post Cost:** Opens *Work Order Cost Entry* 

Add Task Comment: Add comments to Tasks

**Print:** Print the Task

### **Bill of Materials Added**

Summary: A Bill of Materials (BoM) can now be created and assigned for maintenance-worthy items. Discussion:



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Ī	Mater	ial					
0	Capital Pro	ject Pu	rchasino	•			
	Narehous	-	-	-			
F	Parts 🗸						
	Dn-hand A	diuetm	ente				
	P-Card →	tajaotin	onto				
	Purchase	*					
5	Sales 🕶						
N	/laterial Br	owse					
H	lazardous	s Mater	ials				
Т	Tools 🕶	_					
Ē	Bill of Mate	rials	>				
F	Refrigeran	its					
	Refrigeran Key Mana		•				
	-		•				
	-		Transactions ~	Materi	ai∽ Accounting ∽	Organization ~	Admin~ Reports
> Bills of Materia	Key Mana	gement		Materi	al∼ Accounting∽	Organization ~	Admin~ Reports*
> Bills of Materia	Key Manag Materials *	gement		Materi	alv Accountingv	Organization ~	Admin v Reports v
> Bills of Materia Bills of M All Bills of Mate	erials = E	gement	Transactions ~				
> Bills of Materia Bills of Materia Bills of Materia Code 11 T	als Atterials ** Haterials = = = Name 11 V	gement	Transactions *		Modified Date 11 ∀	Created By 11	. ∀ Modified By 1
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► Bills of Materia Bills of Materia Bills of Materia All Bills of Materia Code 11 ⊽ RAM-GRP	als Materials 🛠 Marea 11 T Dodge Ram BOM	gement	Transactions * Created Date 11 10/20/2023		Modified Date 11 ∀	Created By 11 tma tma	. ∀ Modified By 1
> bills of Materia Bills of Materia Bills of Materia Code 11 T RAM-GRP FOCUS-GRP	als Materials 🛠 Materials 🛠 Marea 11 T Dodge Ram BOM Ford Focus BOM	gement III rile~ Group #2	Transactions * Created Date 11 10/20/2023	1 2	Modified Date 11 ⊽ 01/05/2024	Created By 11 tma tma tma tma	. ∀ Modified By 1 trna trna
► bills of Materia Bills of Materia Bills of Materia Bills of Materia All Bills of Materia Code 11 7 RAM-GRP FOCUS-GRP JBOM	als Materials & Materials & Marten 11 V Dodge Ram BOM Ford Focus BOM JBend Oroup	gement III rile~ Group #2	Transactions * Created Date 1/ 10/20/2023 10/23/2023	1 2	Modified Date 11 ∀ 01/05/2024 10/23/2023	Created By 11 tma tma tma tma tma tma	고 Modified By 1 tma tma

The BoM accommodates a comprehensive list of parts, items, assemblies, and other materials for your maintenance-worthy item.

Select *Material* > *Bill of Materials* to open the new window where you see the BoM groups as well as create new BOM Groups and select parts and items.

The **Part Reference** Tab on the following MWI windows now includes a *BoM Group Parts* section:

- Entity
- Equipment
- IT Equipment

The **XRef** Tab on the following MWI windows includes a *BoM Group Parts* section:

- Biomed
- Asset
- Vehicle

+ Add Item

The *Parts / XRef* window also includes a *BoM Group Items* section.

### **Mass Import Module**

BoM Group Parts

Honda /

Identity

Activ

+ Add Part

Tag #

Checkout

ITEMS

23156

Part Reference

Summary: The Mass Import module is available for System Administrators to import new data or update existing data.

The new menu options are available on the Admin menu. Go to *Admin > User Management > Records / Window Access* to give your administrative user Full access to the new window.

# Mass Import Module

_	•		
Import		+ Create Import	Discussion:
HISTORY  Import Summary Import List  TEMPLATES Excel Templates			The Dashboard view shows Import history as a graphic summary and individual files.
	Import List	Q         Filter           28, 2023         1019-14 AM           5, 5023         114-654 AM	The <i>Templates</i> tab shows a list of the available Excel Templates you can download and complete before importing. The list of Templates will increase in the future.
Path: Ac	Biomed-32 Convect Other To Compare to A Third New Convect Of Compare to Environment Other To Compare to A Third New Compare to A Third Ne		Select the desired link or 🛃 button to download the template.
HISTORY • Import Summary • Import List <b>TEMPLATES</b> • Exail Templates	Excel Templates Account I Moster Co.2 Account Account Account and Importantees Account and Importantees Account and Importantees Account Account and Account A	tTemplatexio:	Once the template is completed, you can use the + Create Import Dutton on the Dashboard or use the menu Admin > Mass Update > Create Import. Select the Data Type of your import template
Import	1 2	X Close	Select the <i>Data Type</i> of your import template (Equipment, Asset, etc.), and click the <i>Choose</i> button to select your completed Excel spreadsheet.
Data Trife Equipment V	figure Import Review and Import	Import Complete	Click the $Next > Next >$ button to see your data before import.
+ Choose			The results display with an indication of the status of each line: UPDATE CREATE INVALID Create, Update, or Invalid.
Next >			You can use the Selection Mode buttons to make changes to a line. First, select the initial button:
3 Total R	_	K Close     S     Import Complete cord to Update     I Record to Skip	Enter Selection Mode
< Back Imp	ort >		This enables the other buttons:
UPONTE AHL	X3         Air Handling Unit         HVAC           X7         Air Handling Unit         HVAC	ARENT TAG # V FACLETY V BUILDING NAME V FLOR CODE Surrent Surrent Surrent	× – 2 🖍 🛛
<	Showing 1 to 3 of 3 entries $\langle\langle 1\rangle\rangle$	>	Select a cell in the table to make the desired change in the <i>Update Selected Fields</i> popup pictured at left.
U	pdate Selected Fields	×	When the data is ready, click the Import > Import > button.
Er	nter a value to update fields:		<b>NOTE:</b> If the data needs serious attention, you can select Close on this window without importing, revise the Excel spreadsheet, and try again.
	Cancel	Update	

# CAD Import Department Codes Available

	Summary: Department Codes are now an option when using CAD Import.
Path: Admin > CAD Import	Discussion:
	Previously, Department Descriptions were available, but the Department Code was not an option. You can now import both Description and Code.