



UC25 | April 8th - 10th 2025

Brand New Day: What's New in WebTMA 7

UC
25 YEARS
OF COMMUNITY, PARTNERSHIP, AND GROWTH



Joe McVay

Director of Solutions Engineering

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Joe McVay has served in various roles at TMA Systems including Senior Implementation Consultant, Product Manager, and is now the Director of Solutions Engineering. Joe has over 14 years of experience in CMMS and EAM applications spanning verticals such as Higher Education, Healthcare, Public Sector, and Manufacturing.

Joe is responsible for leading technical demonstrations of our product offerings and assisting our Engineering department with new development initiatives.





Luis Pino

Director of Account Management

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Luis Pino has been with TMA for nearly 25 years, beginning his career in Support. He quickly transitioned to the Professional Services team, where he played a key role in installation, consulting, and training. After spending three years at a large K-12 district client site, Luis returned to TMA and took on various roles, including Sales Executive, Solutions Engineer, and ultimately Director of Account Management.





Overview

1. Product Roadmap Vision
2. Recently Released Features
3. Upcoming Feature Releases
4. Live Demo



Product Roadmap Vision

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

01

"Intuitive & easy to use"

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

02

"Client co-innovation for product updates"

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

03

"Better views of spatial data and better analytics"

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

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

04

"More flexible & scalable"

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



Voice of the Customer

WebTMA Enhancement Program Based on Client Requests

- TMA Systems has launched monthly program to prioritize "quick-win" client suggested enhancements
- A minimum of one client enhancement is selected each month to be developed
- TMA is currently selecting the enhancements, but we plan to have clients vote directly on the enhancements using the community forum
- Program launched July 2024:
 - November – **New Mexico Tech, Methodist Healthcare, CKS Packaging, Cencora, and Abercrombie & Fitch** - Task Check Group Search enhanced with new columns to use as criteria and UI improvements were added
 - December – **California State Polytechnic University** – The new Service Request Portal was launched
 - January – **Jefferson Health** - UDF Now Available for UPI – AP Payment Import
- Client enhancement requests can be submitted via support (support@tmasystems.com) or through discussions with your Account Manager.



Recently Released



Space Management

- **Multi-Area Occupancy:** Occupants can now be associated with multiple Areas, enabling better space management (e.g., professors linked to both offices and classrooms).
- **Enhanced Visibility:** WebTMA now displays a full list of people related to a space, improving campus planning insights and requestor access.
- **Principal Investigator Areas:** New tracking tool for monitoring space usage and generating reports for better record-keeping.

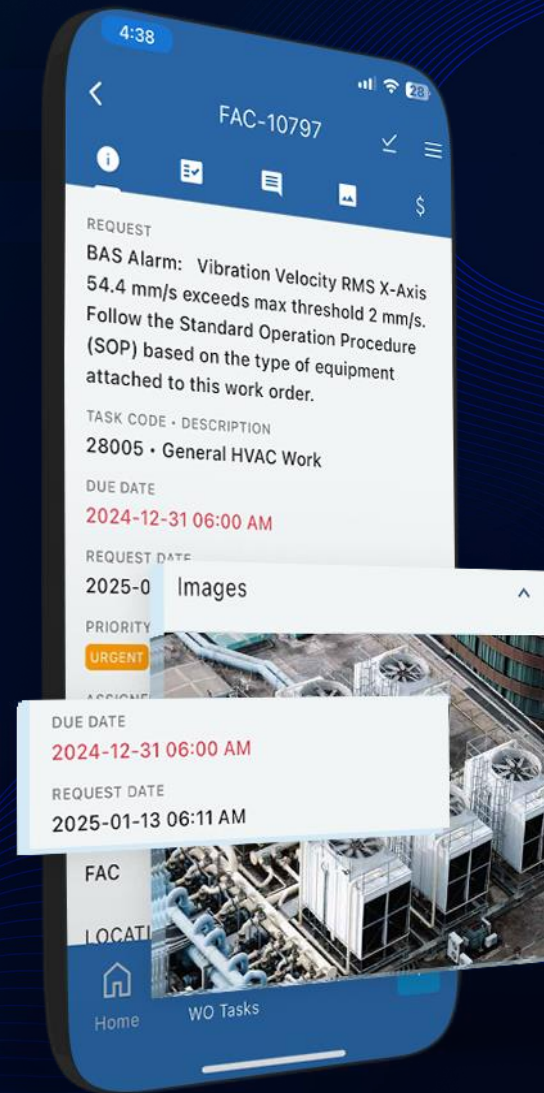
Requestor Locations						
Location Code	Facility Name	Building Name	Floor Code	Room Number	Type	Subtype
01-101C	Main Campus	Administration Building		101C	Office - Standard Configuration	

Principal Investigator Areas				
Location Code	Facility Name	Building Name	Floor Code	Room Number



New Mobile Added Features

- **Single Sign-On (SSO) Support:** Users can now log in seamlessly using Single Sign-On (SSO), enhancing security and convenience.
- **Offline Mode Functionality:** Perform essential tasks like posting costs and completing work orders (WOs) even without an internet connection, ensuring uninterrupted workflow.
- **Enhanced Work Order Editing:** Users can now modify WO status and correct previously posted costs, providing greater flexibility and accuracy in task management.



Service Request Portal

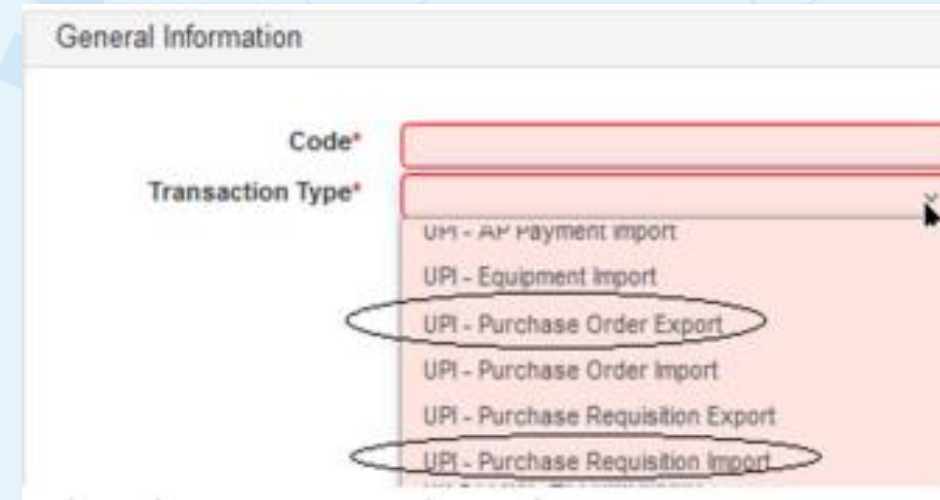
- Launched new Service Request Portal in December 2024.
- Hierarchy Alerts added when blocks are added that can be linked.
- Request Log UDFs can be added to form and will populate fields.
- WO Cost Summary Report added for available Search Pages.
- Material Request added to Form Types available with easy-to-use Item Picker

The screenshot displays the 'Service Request Form - Simple Request' interface. The top navigation bar includes a home icon, the path '/ Service Requests / Request Form - Simple Request', and a user profile icon. Below the navigation bar, the form title 'Service Request Form - Simple Request' is shown along with a URL and a 'Changed since last published on Jul 8' notification. A status bar at the top of the form area contains tabs for 'Submission', 'Confirmation', and 'Status'. The main form area is titled 'Submit Service Request' and contains a preamble text, an 'ISSUE DESCRIPTION' field with a placeholder 'Please describe the issue requiring action or service', and input fields for 'NAME', 'EMAIL', and 'PHONE NUMBER'. On the right side, a 'FORM BLOCKS' sidebar lists various form components: 'Only Available' (radio button), 'ORGANIZATION' (Repair Center, Department), 'REQUEST' (Action Requested, Task Code), 'LOCATION' (Facility, Building, Area, Floor), 'REQUESTOR INFO' (Requestor Name, Phone Number, Email Address), and 'TEXT' (Rich Text, Section Title).

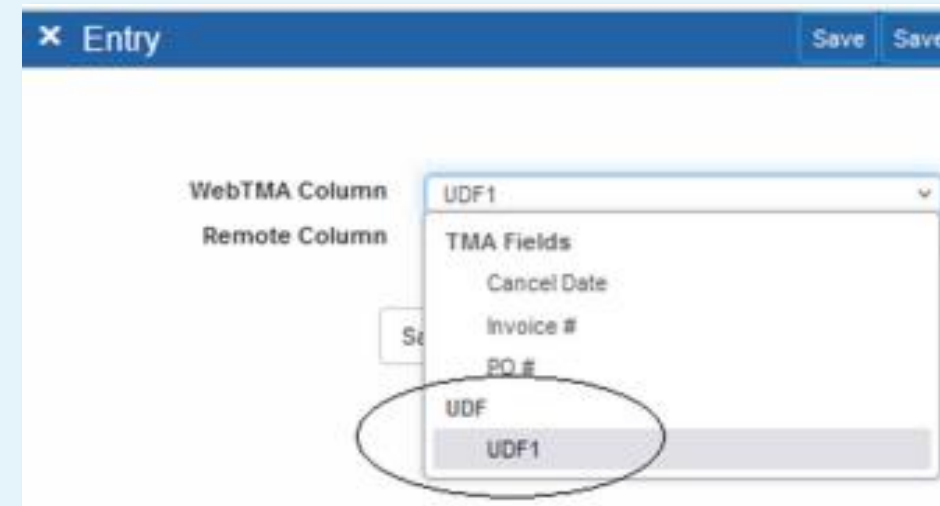


UI Enhancements

- Additional PR and PO Import/Export Options to match client desired processes.
- Receiving Import enabled to auto-receive. This allows Clients to skip the Staging step.
- UDFs added to AP Payment Import
- UFI enabled to retain Trailing Separators to meet file needs for clients.



The screenshot shows the 'General Information' window with the 'Transaction Type' dropdown menu open. The menu lists several options, with 'UPI - Purchase Order Export' and 'UPI - Purchase Requisition Import' circled in red. The other options are 'UPI - AP Payment Import', 'UPI - Equipment Import', 'UPI - Purchase Order Import', and 'UPI - Purchase Requisition Export'.



The screenshot shows the 'Entry' window with the 'UDF' dropdown menu open. The menu lists 'TMA Fields' (Cancel Date, Invoice #, PO #) and 'UDF' (UDF1). The 'UDF1' option is circled in red. The 'UDF' option is also highlighted in blue.

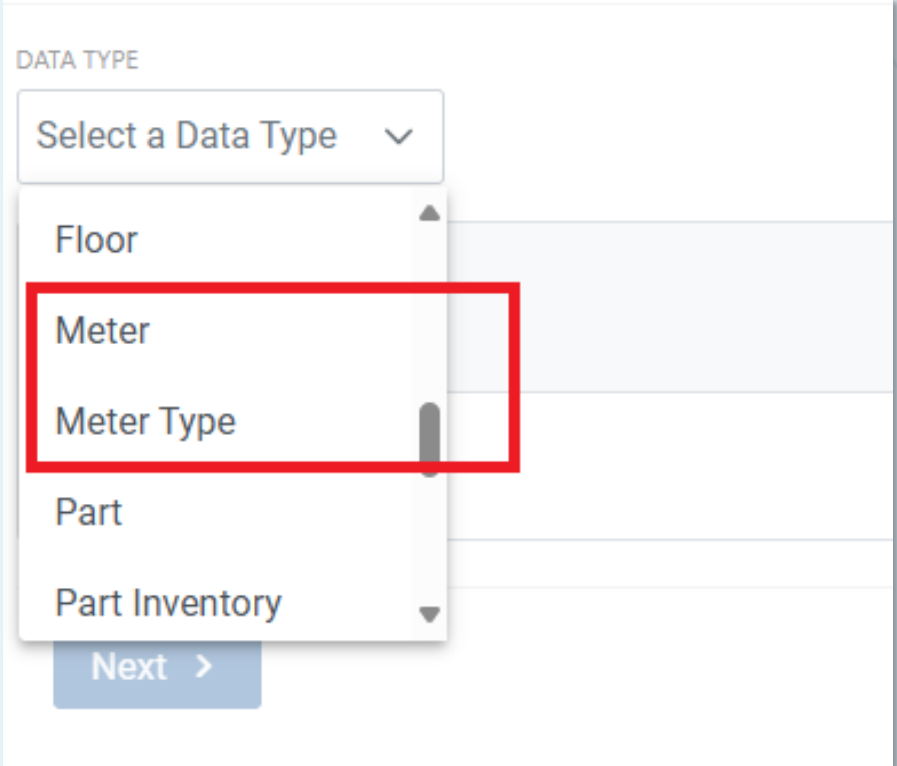


Mass Imports: Meters

We continue to add functionality based on Customer feedback to enhance the Mass Import Tool.

- Meter Type Import Added
- Meter Import Added

Meter Readings Import released March 4th, 2025



DATA TYPE

Select a Data Type ▼

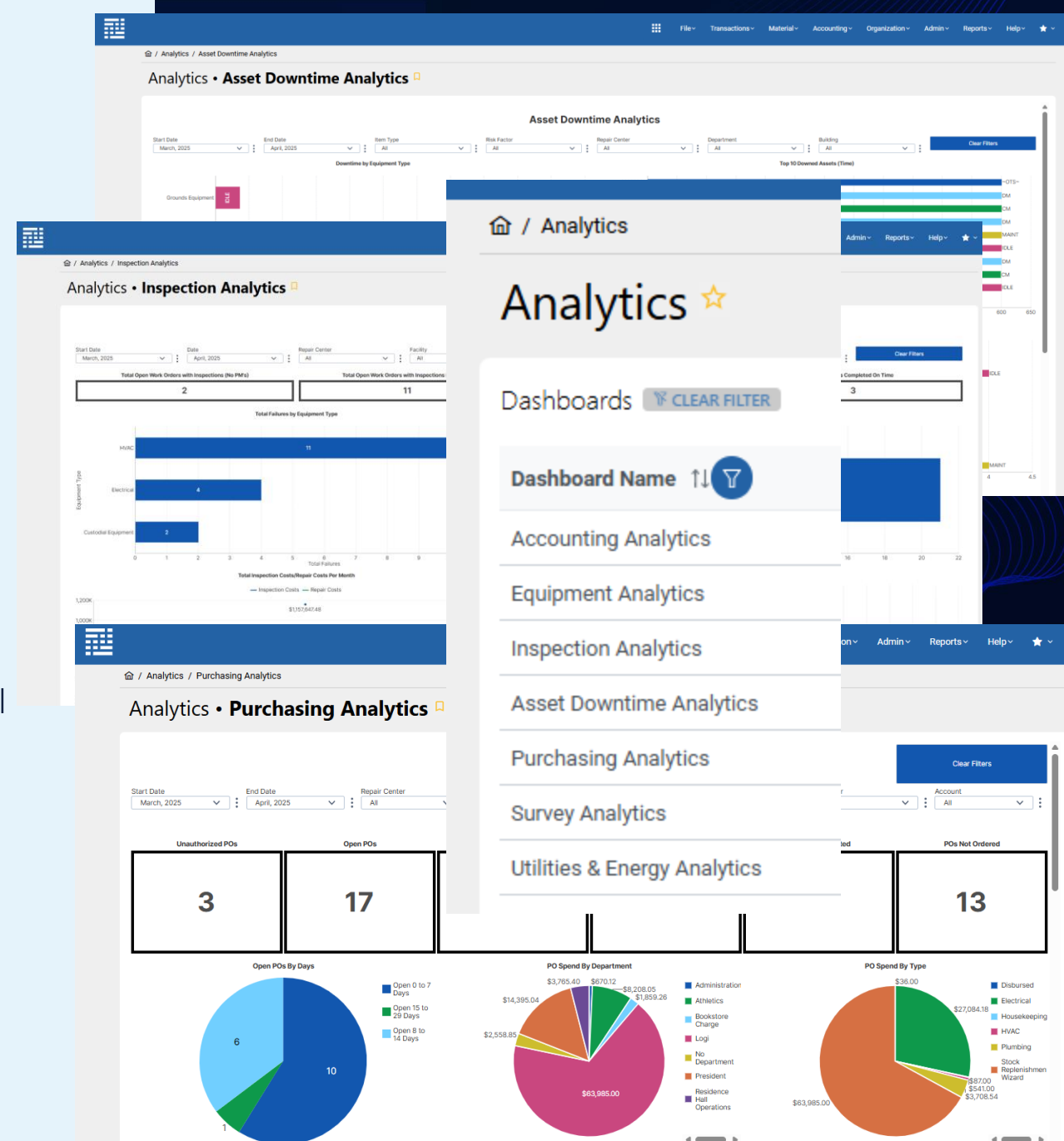
- Floor
- Meter
- Meter Type
- Part
- Part Inventory

Next >



Analytics Dashboards

- **Far more than a Dashboard:** TMA has assembled a Business Intelligence Team to create a set of analytical dashboards.
- **Enhanced Criteria:** These Dashboards allow for using complex parameters, multiple on-the-fly filters, and data sets in real time.
- **Multi layered Drill Down Capabilities:** Dashboards allow for drill down multiple into multi layers, all the way to individual records.
- **Elegant Presentation:** Dashboards incorporate advanced visual controls to better represent data and trending.



Additional Q1 Product Releases



- **Linked Documents**
Now categorized by document type and linked entity for easier navigation.
- **Warehouses**
Now able to copy inventory over when copying a warehouse
- **Pending Charges Review/Dispute**
Can now be exported to Excel
- **WO Part Request**
Added to WO Action Menu for easier access
- **Warehouse Code and Name**
Added as additional fields in Part Request
- **Vendor/Manufacturer/Contract or Mass Import**
added



Additional Q1 Product Releases



- **Criteria**
Added to Advanced Find on Requestor Window
- **Task Code**
Now available in Request Log Advanced Find
- **Equipment Serial Number**
Added to Fast Find criteria
- **Work Order Number**
Added to the Audit Trail grid in the Location Tab for Parts
- **eSignature Function**
Added for compliance needs
- **Key Reports Added**
Key Issuance Receipt, Key Ring Issuance Receipt, Key Return Receipt and Key Lost Receipt



Biomed Integrations

Planned Releases Throughout 2025

1

ECRI Interface

The **ECRI Interface** in WebTMA introduces a new UI for managing device types from the UMDNS Sourcebase, associating or adding vendors, and monitoring device alerts. Users can view alerts, access details, and create Work Orders for biomed equipment with associated ECRI codes, ensuring efficient maintenance and compliance.

2

AeroScout Intergration

Integration enables real-time location (RTL) updates for mobile assets by automatically syncing AeroScout's tracking data with WebTMA. This ensures accurate asset management, audit trails, and BioMed Transfers, provided tag numbers and location hierarchies are aligned across both systems.

3

Medigate Intergration

Integration automates biomed equipment record management while updating the IT Security tab with critical information, reducing the need for manual audits and database maintenance. This streamlines operations, enhances security visibility, and provides technicians with the necessary data for informed decision-making.

4

ServiceNow Integration

Integration automates request creation by seamlessly transferring selected requests from ServiceNow into WebTMA while sending key work order details back for real-time updates. This streamlines workflows, enhances communication, and allows organizations to centralize request management across departments.



Upcoming Feature Releases



WebTMA Mobile

New Mobile Available Now!

Master Checks

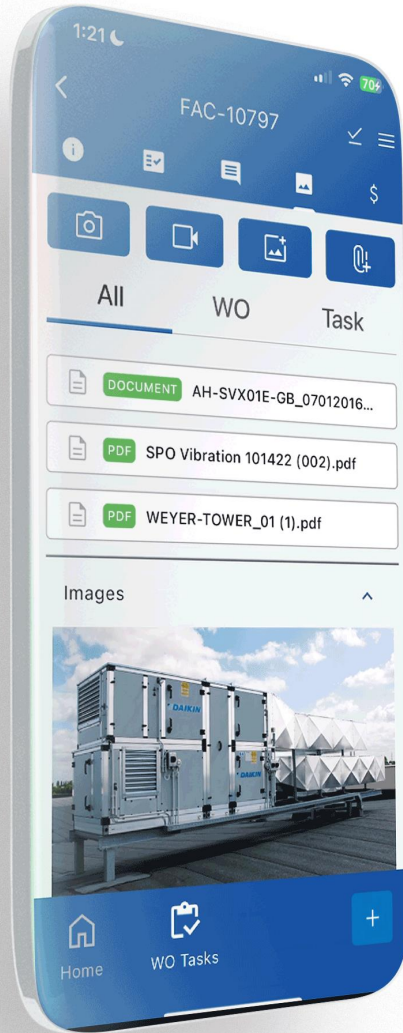
- Adding the function of Master Checks to the new mobile.
- New interface to allow faster in field activity.

Expected Release: 3/31/25

Form Attributes

- Ability to update fields and requirements for specific forms on the mobile to allow a more custom experience.

Expected Release: Q2 2025



AI Assisted Scheduler

- New Calendar View to see current scheduled work for the team.
- User will set criteria for the WOs they will want to be scheduled.
- AI tool will return a suggested schedule and user will be able to modify before confirming changes.
- This solves one of the largest issues in workforce management. Forward progress on ways to streamline processes and save client resources.

Expected Release: Q2 2025

AI Scheduling

Select the time frame, the technicians, and the set of tasks that will included in the scheduling pass, then click "Next"

Select the start end time for the time period you would like to schedule tasks within.

Select Time Frame

QUICK SELECT

Mon to Fri Mon to ∞
Now to ∞ Mon - Two Weeks

FROM Monday, Feb 3rd, 2025
TO Friday, Feb 8th, 2025

Select Techs

QUICK SELECT

Add by Trade Add by Shop
Add by RC Filter by Trade
Filter by Shop

Select the technicians that will be assigned to tasks.

Marlene Wilkinson HVAC X Peter Warren Plumbing X Rosario Richardson HVAC X
Kelvin Burch Plumbing X Antonia Salinas Plumbing X Dillon Mcgee Plumbing X
Dwain Cabrera Plumbing X Dora Waller Plumbing X Type or select to add tech

Select Tasks

QUICK ADD

Add all Unscheduled Add all
Add by Trade Add by Priority
Filter by Trade Filter by Priority
Remove all Unestimated

Select the tasks to assign and schedule

☐ Also reschedule any floating (scheduled but not anchored) tasks assigned to the selected technicians in the selected time frame according to priority and order criteria

- ☐ Unclog Drain Plumbing 3 hrs
- ☐ Broken Aircon HVAC 4 hrs
- ☐ Adjust Office Thermostat HVAC 3 hrs
- ☐ Replace Faucet Plumbing 7 hrs
- ☐ Clear Disposal Jam Plumbing 3 hrs

Run Scheduling

Task Schedule

6 technicians
600 / 940 hrs. scheduled

Feb 3, 2025 - Feb 8, 2025

Monday - Feb 3, 2025

8:00 am 9:00 am 10:00 am 11:00 am 12:00 pm 1:00 pm 2:00 pm 3:00 pm 4:00 pm

Peter Warren 40 hrs / wk • Plumbing
Kelvin Burch 40 hrs / wk • Plumbing
Antonia Salinas 40 hrs / wk • Plumbing
Dillon Mcgee 40 hrs / wk • Plumbing
Dwain Cabrera 40 hrs / wk • Plumbing
Dora Waller 40 hrs / wk • Plumbing

Broken Aircon 4 hrs • High • HVAC
Clear Disposal Jam 3 hrs • Medium • Plumbing
Insulate Pipes 3 hrs • Low • Plumbing
Blocked 2 hrs
Replace Supply Lines 3 hrs • Low • Plumbing
Swap Showerhead 6 hrs • Medium • Plumbing
Blocked 1 hr
Replace Mainline Valve 4 hrs • Medium • Plumbing
Reseat Toilet Seal 5 hrs • Low • Plumbing
Test Water Pressure 3 hrs • Low • Plumbing

UNSCHEDULED TASKS

Unclog Drain 3 hrs • High • Plumbing
Replace Faucet 7 hrs • Medium • Plumbing

Sort by Priority Add Tasks



Contractor Portal

- **User Management:** TMA Admin creates Contractor Manager accounts, who then add Contractor Technicians. Technicians receive email links with authorization tokens for secure access—no passwords required.
- **Work Order Management:** Technicians can view work order details, including WO#, Facility & Building Info, Request Date, Priority, and Supervisor Contact.
- **Technician Actions:** Technicians can set arrival time, update status & notes, complete work orders, add task comments, and enter invoices.

Expected Release: Q2 2025



New UI WO Detail

- **Work Order Detail Feature:** Users can view and manage work orders in the new UI based on permissions—editable for those with access and read-only for others. Double-clicking a WO opens it in the new UI, with actions like Finish, Complete, and Post Finish available per user roles.
- **Work Order Fields & Dependencies:** Fields include WO Type, Priority, Location, Item Details, Requestor Information, Account & Task Codes, Trade & Contractor Details. WO Subtype appears only if relevant, and a collapsible UDF section is available.
- **Expected Release:** Q1 2025

Work Orders Summary

22

Open

18

Overdue

0

Finished

13

Unassigned

Work Order Tasks

</

Live Demo

AI Scheduler
Service Request Portal
Analytics Dashboards



Thank You / Q&A

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