



UC25 | April 8th - 10th 2025

Start Me Up: CMMS Administrator 101

UC
25 YEARS

OF COMMUNITY, PARTNERSHIP, AND GROWTH



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Eric is a Computer Engineering graduate from Milwaukee School of Engineering. He is PMP certified and has worked for TMA Systems for 3.5 years. He brings over 18 years of technology experience including 12 years of CMMS experience, and 3 years of building management experience.





Agenda

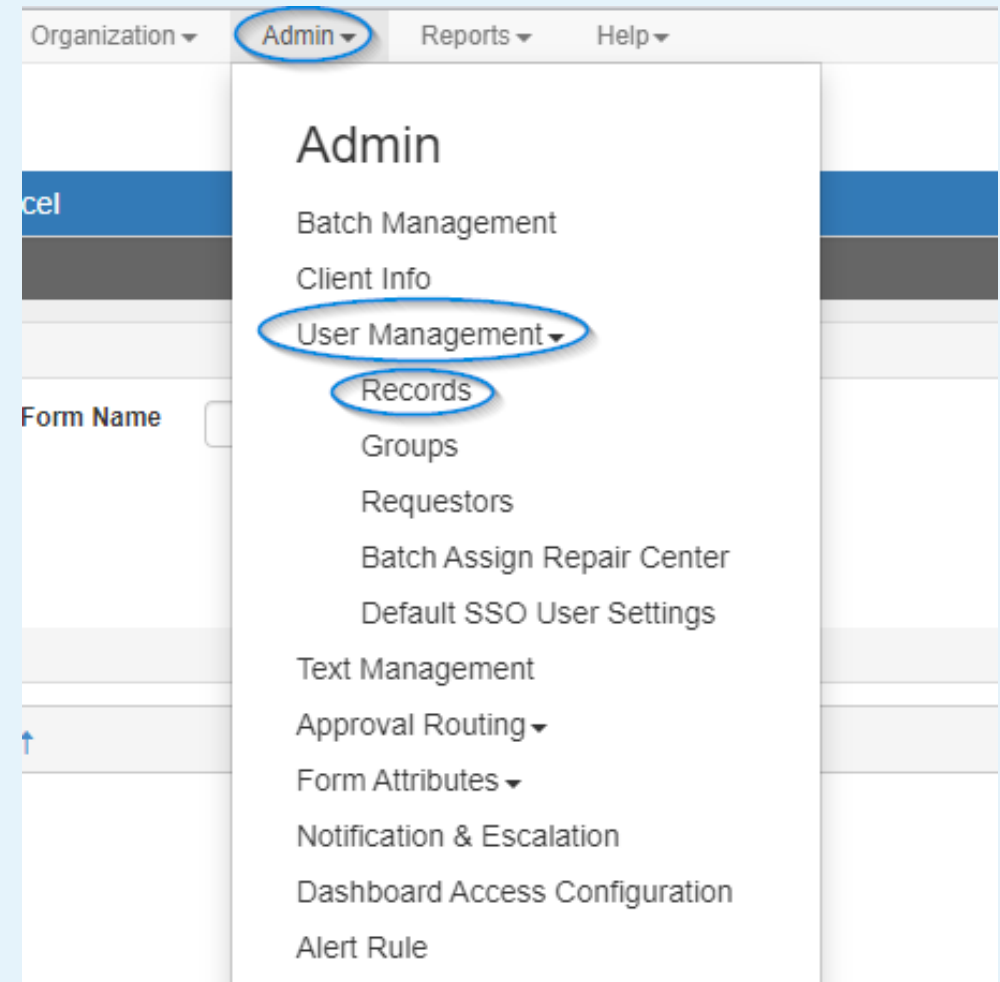
1. User Management
2. User Group Management
3. Text Management
4. Forms
5. Demo



User Management

User Management Tabs

- Identity
- Preferences
- Window Access
- Data Access
- Defaults
- My Dashboard



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USER MANAGEMENT

✓ Save ✕ Cancel

Identity Preferences Groups Window Access Data Access Mobile Access Repair Centers Managed Resources Defaults My Dashboard API Roles

Login ID 1

Preferences

Clear All Preferences

Description	Effective Value	Value
Allow Invoice Matching	<input type="text"/>	Granted
Allow to Cancel Work Order	<input type="text"/>	Not Determined
Allow to Close Project	<input type="text"/>	Denied
Allow to Modify Master Program	<input type="text"/>	<input type="text"/>
Allow to Modify Master Task	<input type="text"/>	<input type="text"/>



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USER MANAGEMENT

✓ Save ✕ Cancel

Identity | Preferences | Groups | **Window Access** | Data Access | Mobile Access | Repair Centers | Managed Resources | Defaults | My Dashboard

Login ID 1

Window Access

Full | Add/Edit | Add | Edit | Read Only | None | Not Determined

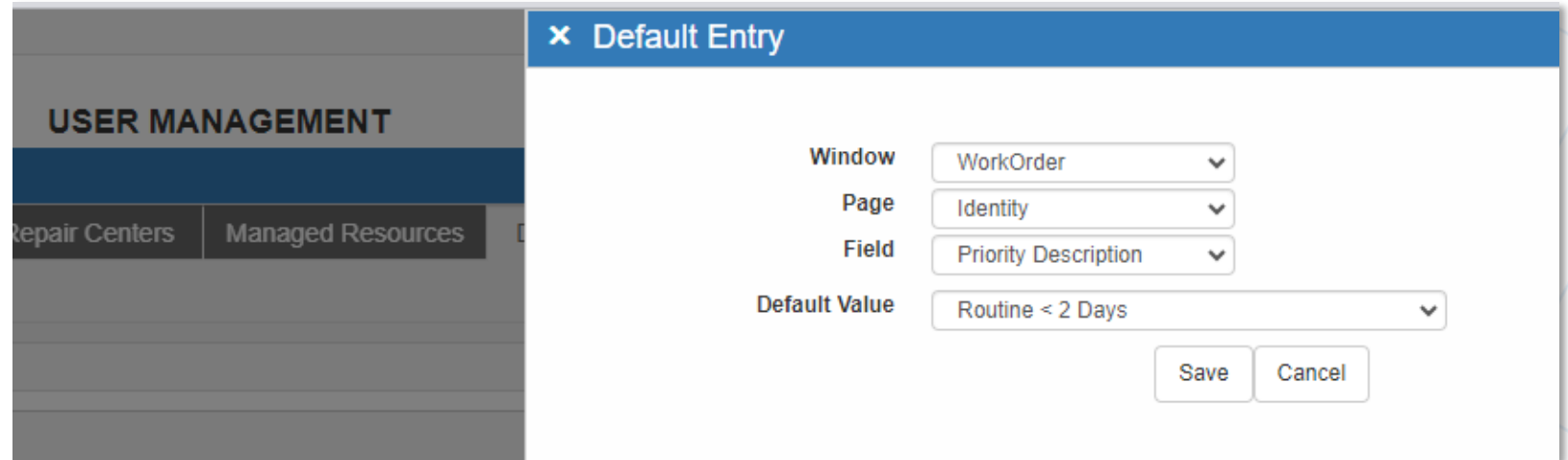
Admin	Not Determined	Not Determined	Not Determined
Alert Rule	Not Determined	Full	Not Determined
Archive and Purge	Not Determined	Add/Edit	Not Determined
Auto-Schedule Rule	Not Determined	Edit	Not Determined
Batch Management	Not Determined	Add	Not Determined
BIM Template Setup	Not Determined	Read	Not Determined
Client Info	Not Determined	None	Not Determined
Dashboard Access Configuration	Not Determined	Not Determined	Not Determined



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The screenshot shows a 'USER MANAGEMENT' interface with a sidebar containing tabs for 'Repair Centers' and 'Managed Resources'. A modal dialog box titled 'Default Entry' is open, displaying the following configuration:

Window	WorkOrder
Page	Identity
Field	Priority Description
Default Value	Routine < 2 Days

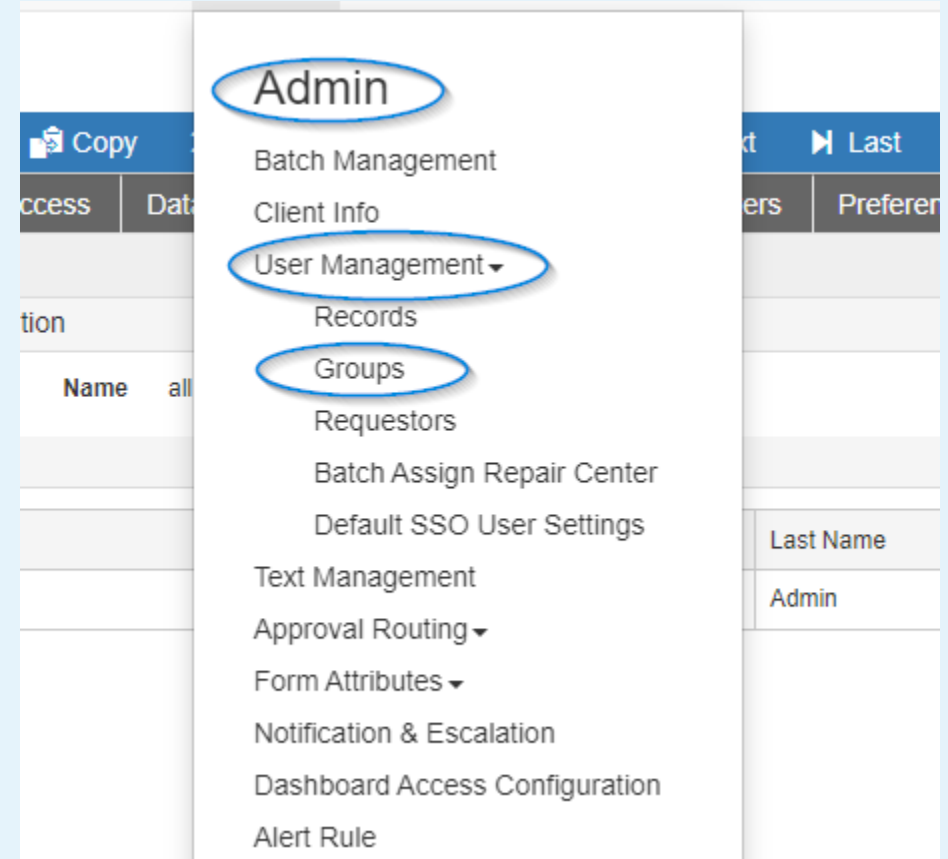
Buttons for 'Save' and 'Cancel' are located at the bottom right of the dialog.



User Group Management

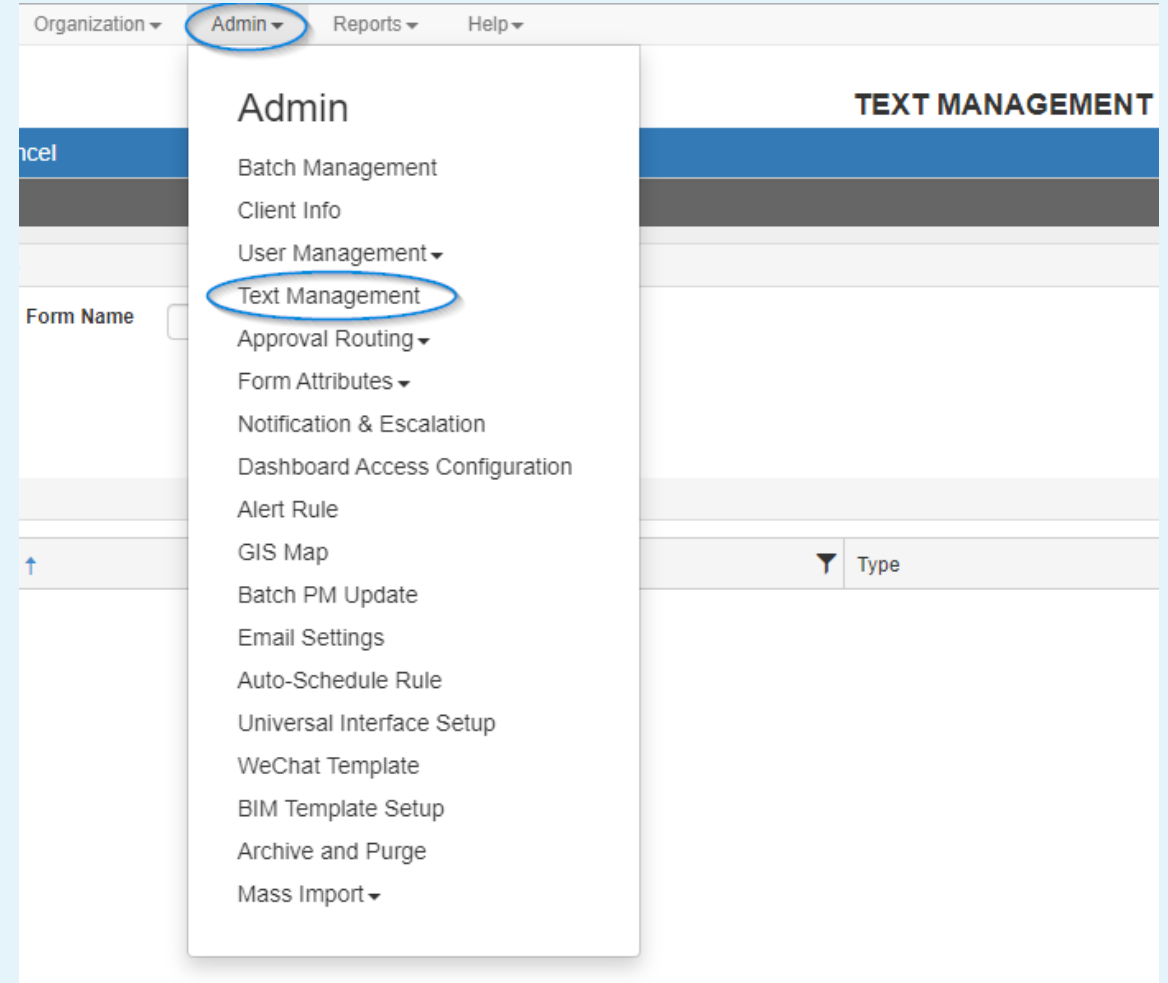
Things to Consider with Group Management

- Types of User Groups
- Benefits of User Groups
- Documentation



Text Management

- Access
- Purpose
- Things to consider prior to making changes



The screenshot displays a software interface with a top navigation bar containing 'Organization', 'Admin', 'Reports', and 'Help'. The 'Admin' menu is open, showing a list of options: 'Batch Management', 'Client Info', 'User Management', 'Text Management', 'Approval Routing', 'Form Attributes', 'Notification & Escalation', 'Dashboard Access Configuration', 'Alert Rule', 'GIS Map', 'Batch PM Update', 'Email Settings', 'Auto-Schedule Rule', 'Universal Interface Setup', 'WeChat Template', 'BIM Template Setup', 'Archive and Purge', and 'Mass Import'. The 'Text Management' option is circled in blue. The main content area on the right is titled 'TEXT MANAGEMENT' and features a blue header bar, a dark grey bar, and a table with a 'Type' column.



Forms

System From Attributes

- Purpose
- Access
- Benefits
- User Defined Fields (UDFs)
- Action Menu Items
- Service Request Forms

Custom Forms

- Purpose
- Benefits and Uses
- Access
- UDFs



Thank You / Q&A

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