TMASYSTEMS

UC25 | April 8th - 10th 2025

Information Overload

Managing Data in WebTMA with the Mass Import Tool

UC 25 YEARS

OF COMMUNITY, PARTNERSHIP, AND GROWTH



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Based in Tulsa, Dan has a 15-year career at TMA Systems, progressing from the support center to a pivotal role in Professional Services since 2010. He excels in SAML support and has a notable expertise in Microsoft Excel in addition to leading efforts in external application implementation.

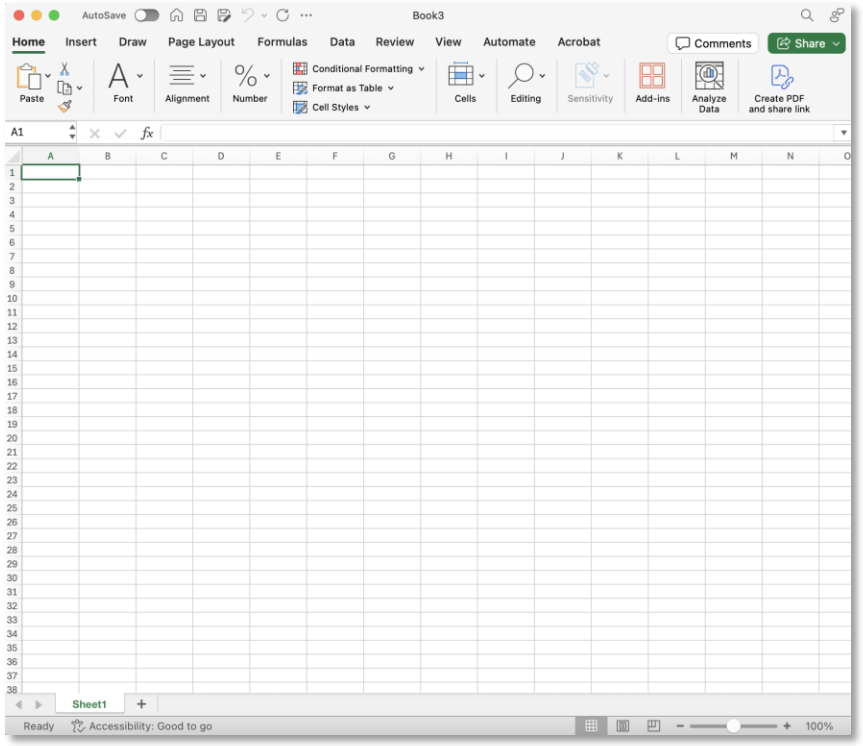
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Agenda

1. Accessing the Mass Import tool
2. Excel Templates
3. Importing Information
4. Reviewing/Editing information
5. Importing Your Data

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What is Mass Import and how does it work?

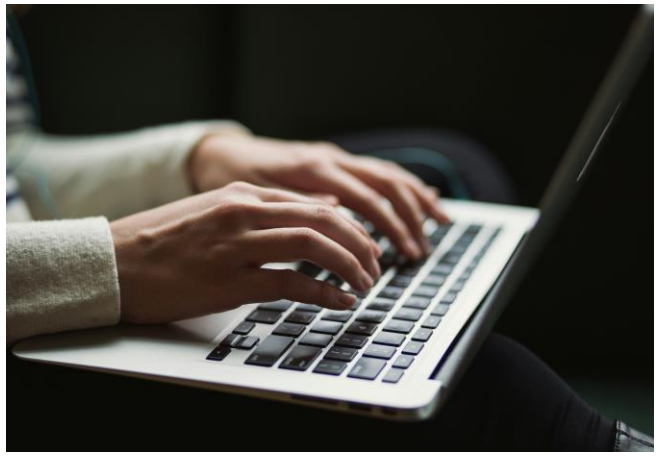




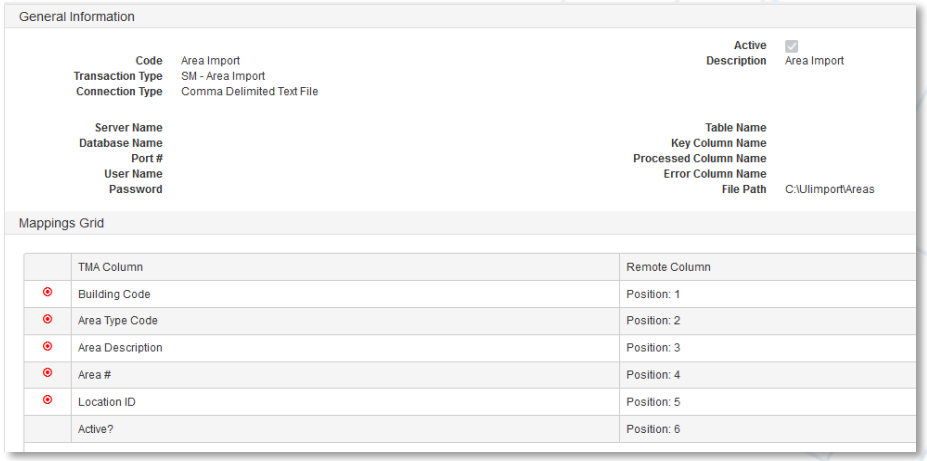
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Current Import Methods

Manual Input



Universal Interface (UI / UPI)



General Information

Code	Area Import	Active	☑
Transaction Type	SM - Area Import	Description	Area Import
Connection Type	Comma Delimited Text File		
Server Name		Table Name	
Database Name		Key Column Name	
Port #		Processed Column Name	
User Name		Error Column Name	
Password		File Path	C:\UIimport\Areas

Mappings Grid

	TMA Column	Remote Column
⊙	Building Code	Position: 1
⊙	Area Type Code	Position: 2
⊙	Area Description	Position: 3
⊙	Area #	Position: 4
⊙	Location ID	Position: 5
	Active?	Position: 6

TMA Professional Services

```
--Proper insert/update statement
IF EXISTS (SELECT 1 FROM F_UDF WHERE UDF_ITEM_FK = '1995') UPDATE F_UDF SET
UDF_30CHAR2 = '010308' WHERE UDF_ITEM_FK = '1995' AND UDF_ITEMTYPE_FK = 7 ELSE
INSERT INTO F_UDF (UDF_ITEMTYPE_FK, UDF_ITEM_FK, UDF_30CHAR2) VALUES ('7', '1995',
'010308')

--Insert Linked Documents
UPDATE f_linkeddocs set lds_document = BulkColumn FROM f_linkedDocs, Openrowset
(BULK 'D:\Share\DeLaSalle HighSchool
\1000\1000_3_1311_area_Locker_Rm_Handicap_shower_parts.pdf', Single_Blob) Doc
Where LDS_Filename = '1000_3_1311_area_Locker_Rm_Handicap_shower_parts.pdf'

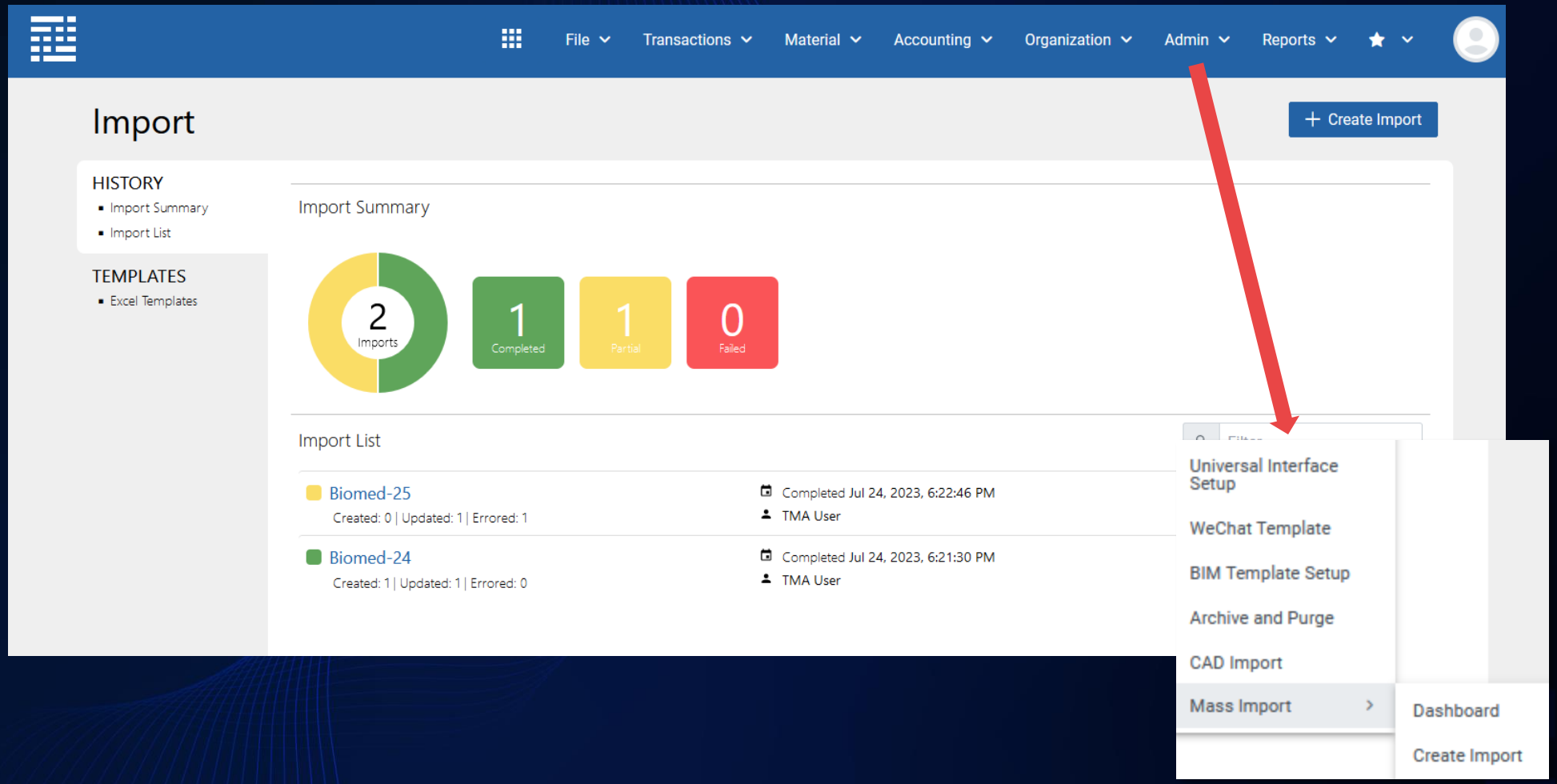
--backup database through query
declare @dbname nvarchar (50) = db_name()
declare @path nvarchar (200) = concat('''D:\Databases\backups\',@dbname,'_',(cast
(Getdate()as date)),'.bak''')
declare @sql nvarchar (300) = concat('BACKUP DATABASE ',@dbname, ' TO DISK =
',@path)
print @sql
exec sp_sqlexec @p1 = @sql
```

API Integration


```
{
  "objectState": "Unchanged",
  "id": 0,
  "code": "string",
  "alternateAccount": "string",
  "name": "string",
  "active": true,
  "isHeader": true,
  "accountTypeId": 0,
  "accountTypeCode": "string",
  "accountTypeDescription": "string",
  "creatorId": 0,
  "createdDate": "2023-09-14T13:41:02.026Z",
  "modifierId": 0,
  "modifiedDate": "2023-09-14T13:41:02.026Z",
  "accountSubTypeId": 0,
  "accountSubTypeCode": "string",
  "accountSubTypeDescription": "string",
  "accountGroupId": 0,
  "accountGroupCode": "string",
  "accountGroupDescription": "string",
  "departmentId": 0,
  "departmentCode": "string",
  "departmentName": "string",
  "currencyId": 0,
  "currencyExchangeId": 0,
  "currencyExchangeDate": "2023-09-14T13:41:02.026Z",
  "encumbered": 0,
```

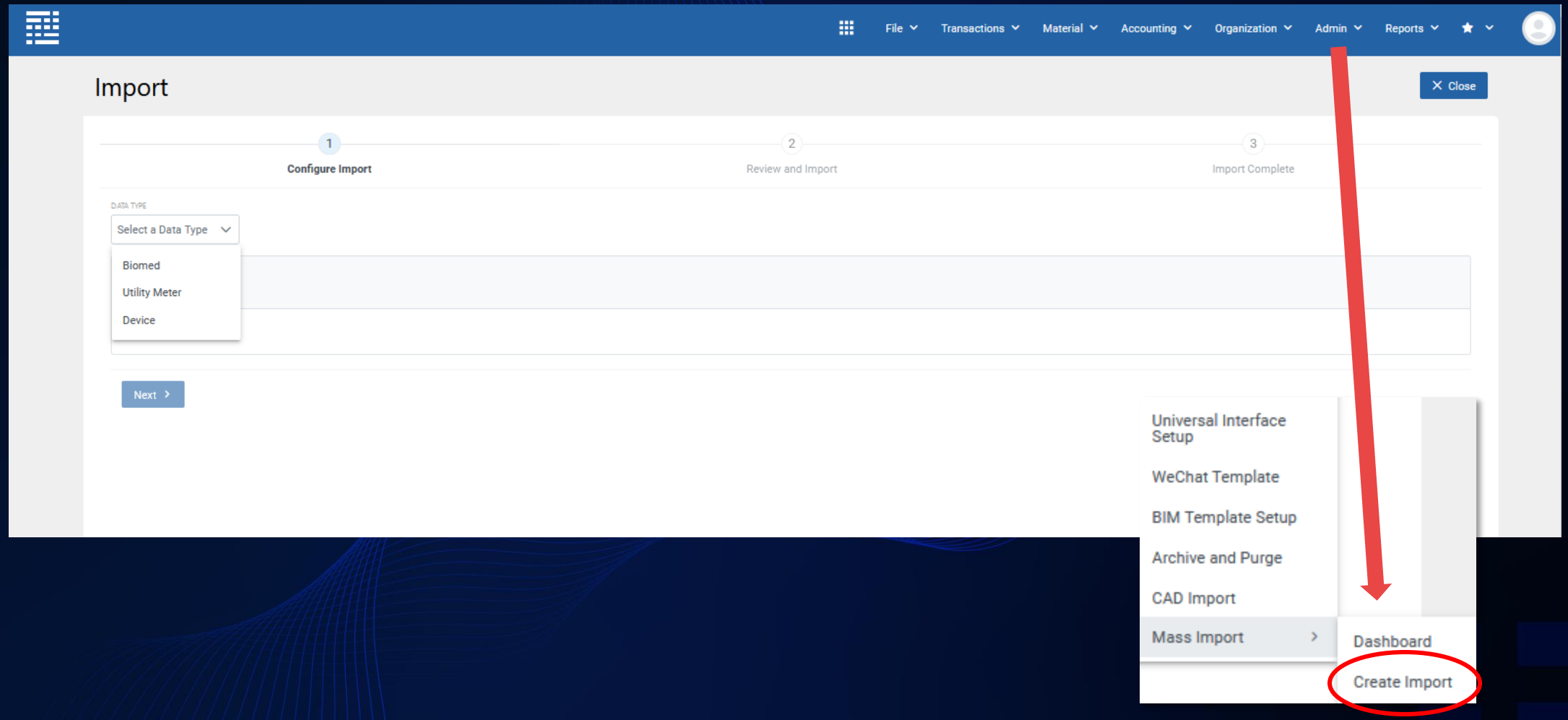

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Mass Import Tool



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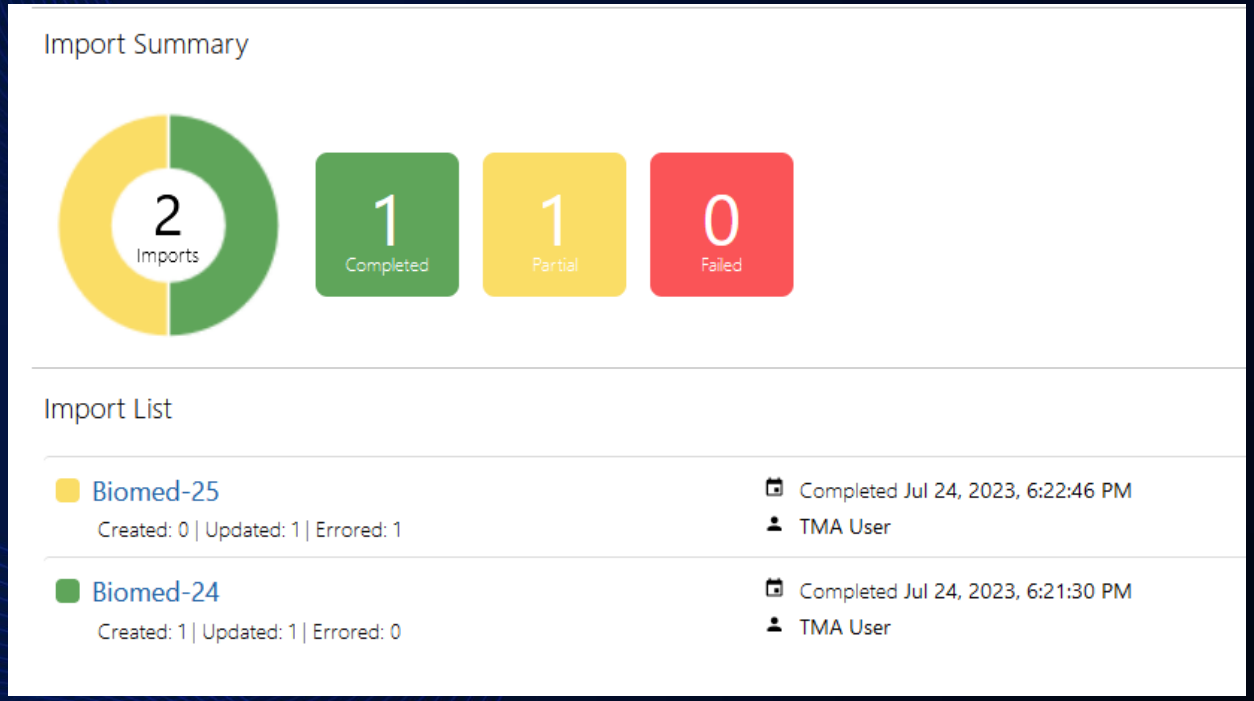
Mass Import Tool



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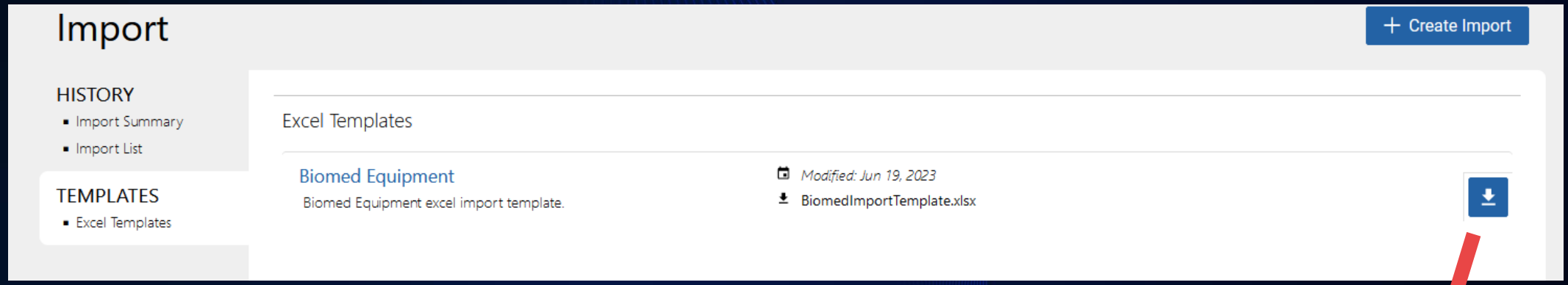
Import Summary

Import summary allows you to see what has been completed so far. It is strictly a summary page.

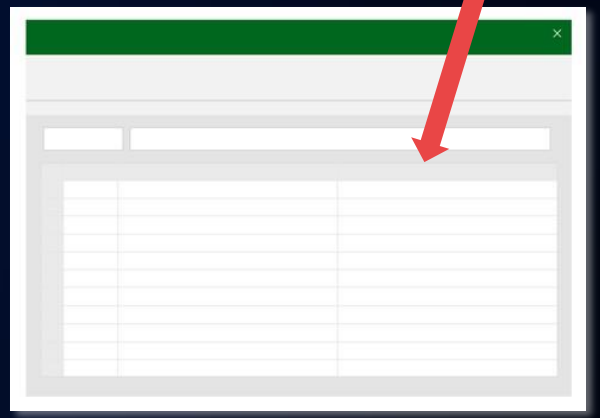


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Excel Templates

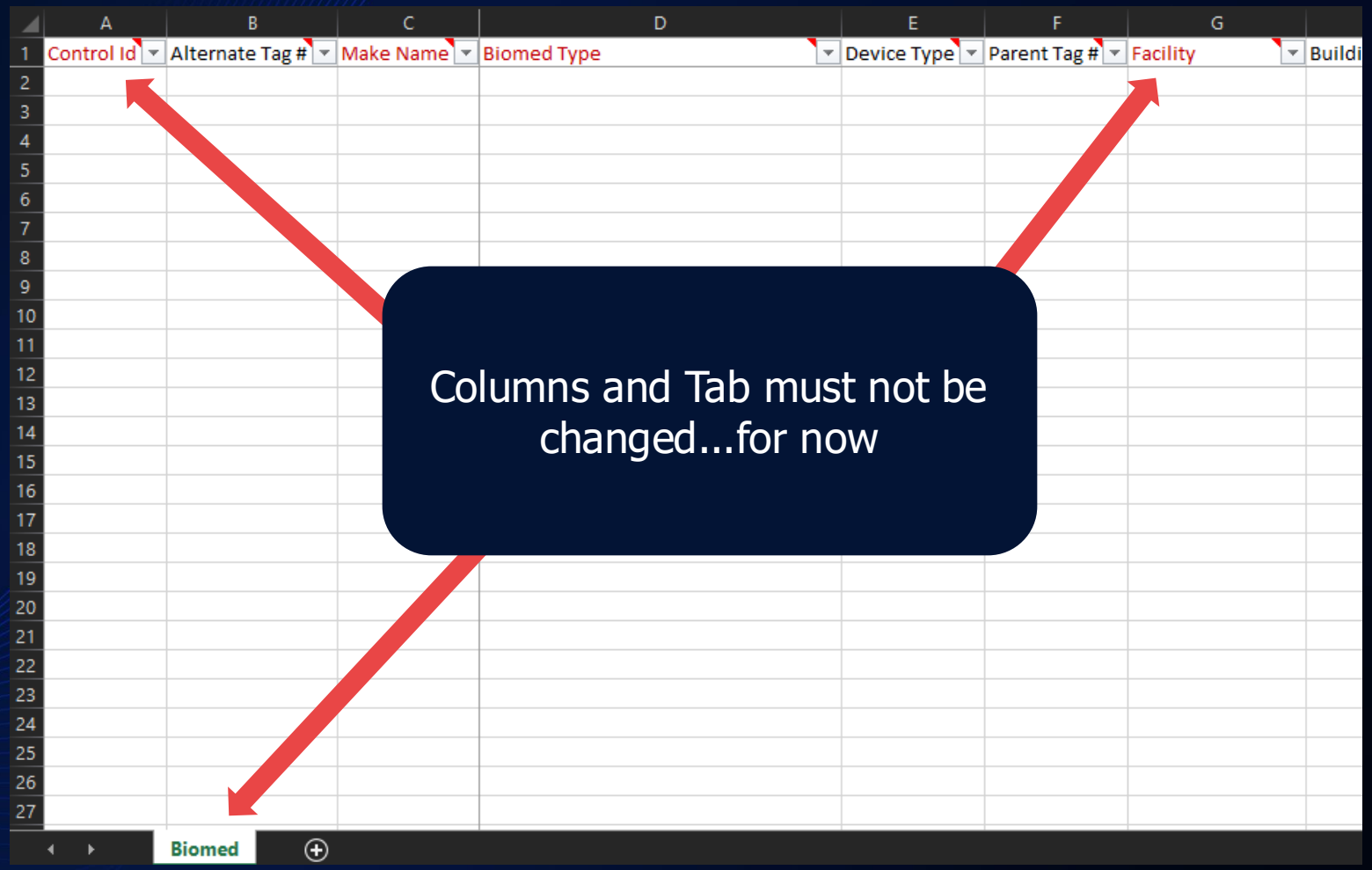


Eventually, all import templates will be listed. Following the template is key to a successful data import.



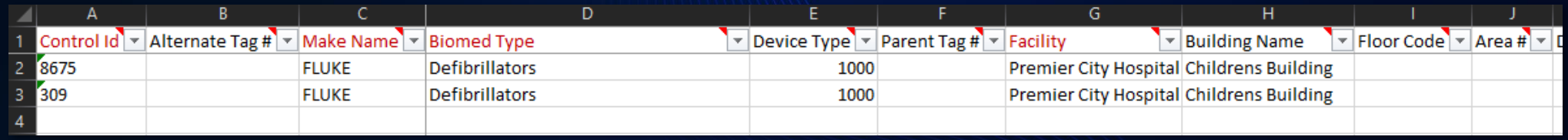
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Working in Excel



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Working in Excel



	A	B	C	D	E	F	G	H	I	J
1	Control Id	Alternate Tag #	Make Name	Biomed Type	Device Type	Parent Tag #	Facility	Building Name	Floor Code	Area #
2	8675		FLUKE	Defibrillators	1000		Premier City Hospital	Childrens Building		
3	309		FLUKE	Defibrillators	1000		Premier City Hospital	Childrens Building		
4										

Ensure the items you put in the spreadsheet connect to actual items in WebTMA:

- Lookups – Types
- Facility
- Building
- Technician

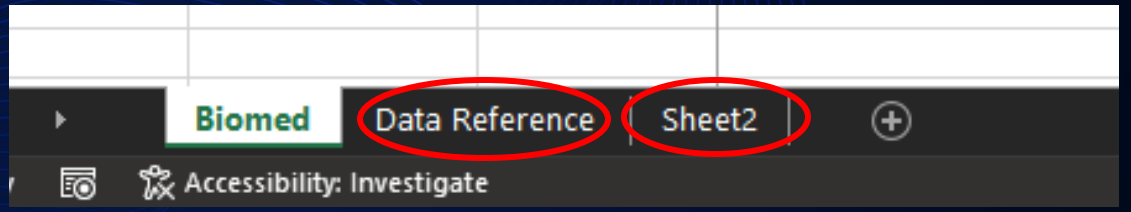
WebTMA will not automatically add these items because they are in the spreadsheet. It will only add the biomed equipment, or whichever type of data you're importing.

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Working in Excel

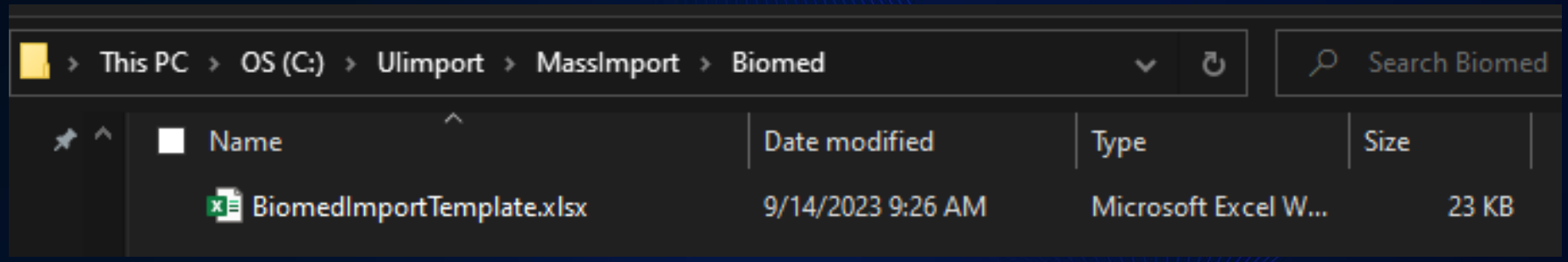
	D	E	F	G
	Biomed Type	Data Reference Column	Device Type	Parent Tag #
	Defibrillators	=VLOOKUP(Biomed!D2,'Data Reference'	1000	
	Defibrillators		1000	

Extra sheets and extra columns will need to be removed and cleaned up.



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Save your file in an accessible location



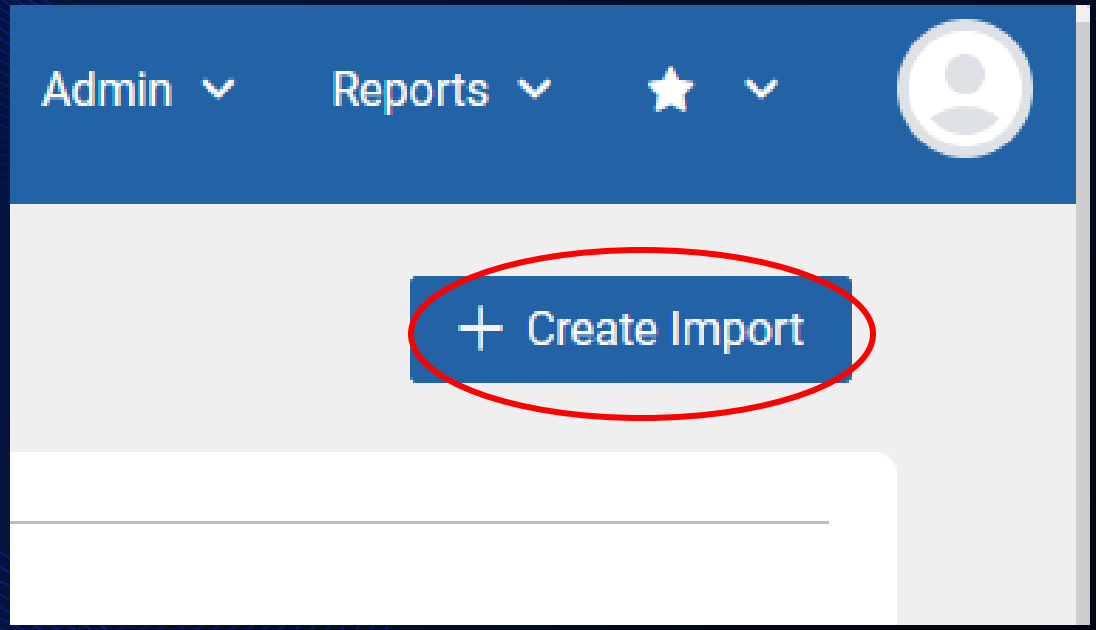
Once your file is cleaned up and ready, save it in an accessible location. It is recommended that you save the file for reference in the future. However, after the import is complete, it may be discarded once data validation is finished.

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Importing your data

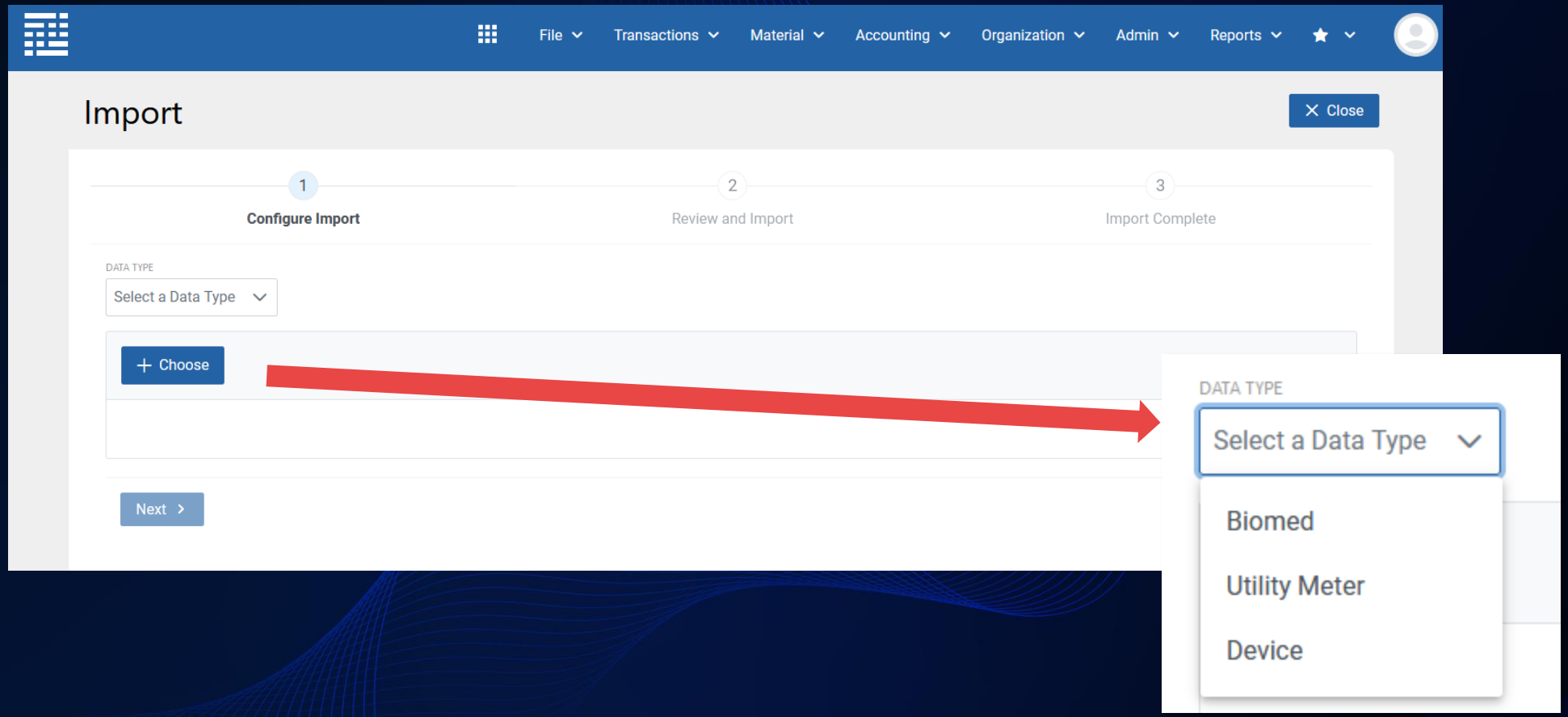
On the Mass Import page, you will see the +Create Import.

Click there to start the import process.



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Select your data type



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Types of Imports



Space Management

- Region
- District
- Facility
- Building
- Floor
- Area



Asset Management

- Asset
- Biomed Equipment
- Device
- Equipment
- Tools
- Vehicles



Finance

- Accounts
- Departments



Inventory Management

- Parts
- Warehouses
- Part Inventory
- Vendors

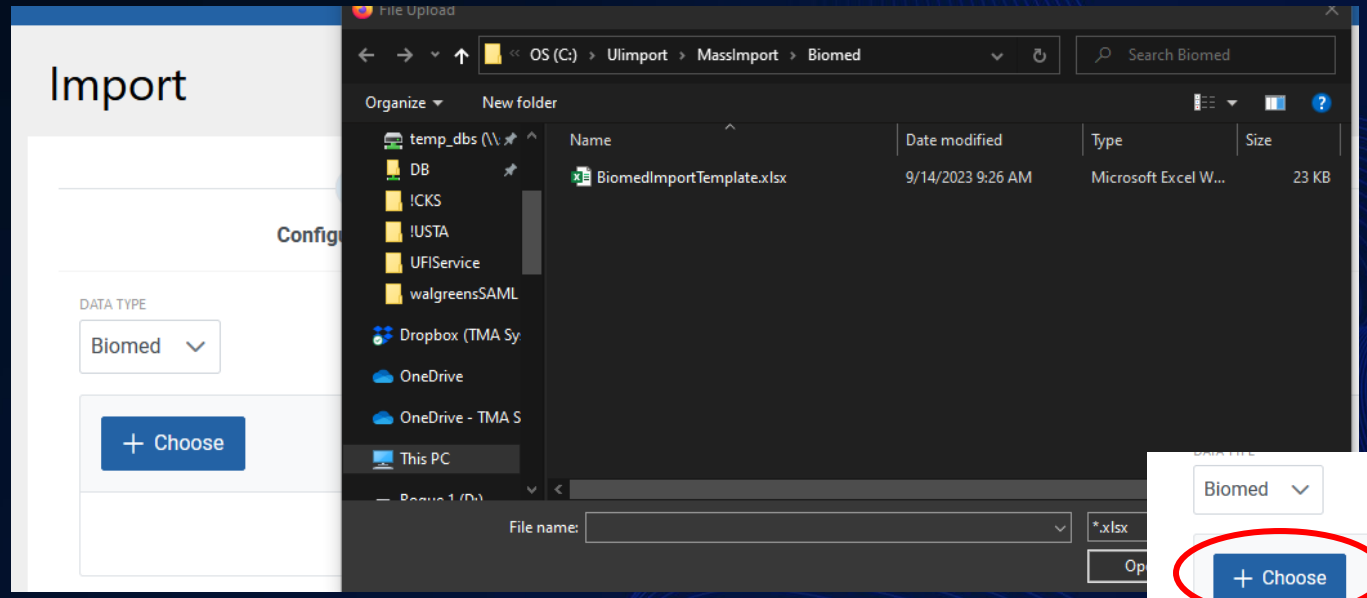


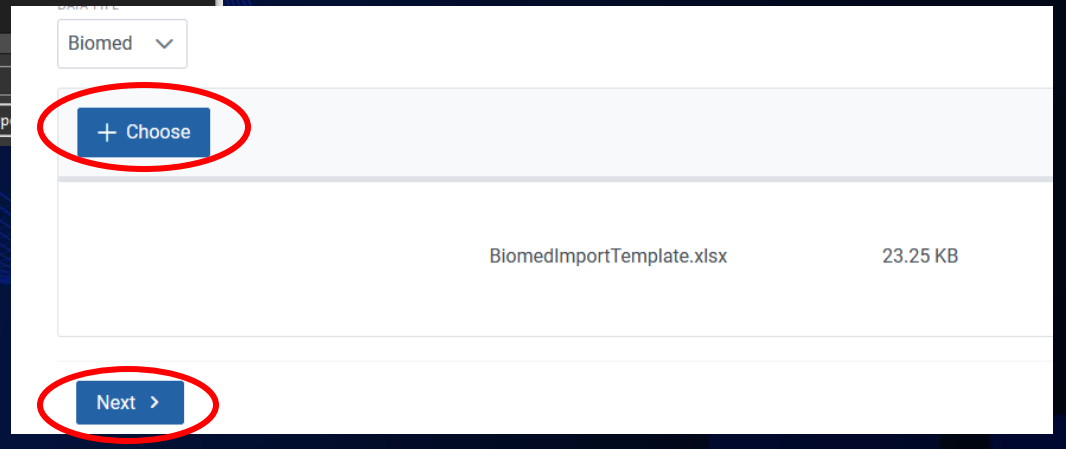
Meters and Utilities

- Fuel and Oil
- Meters
- Meter Readings
- Meter Type
- Utility Meters
- Utility Tickets

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Choose your file

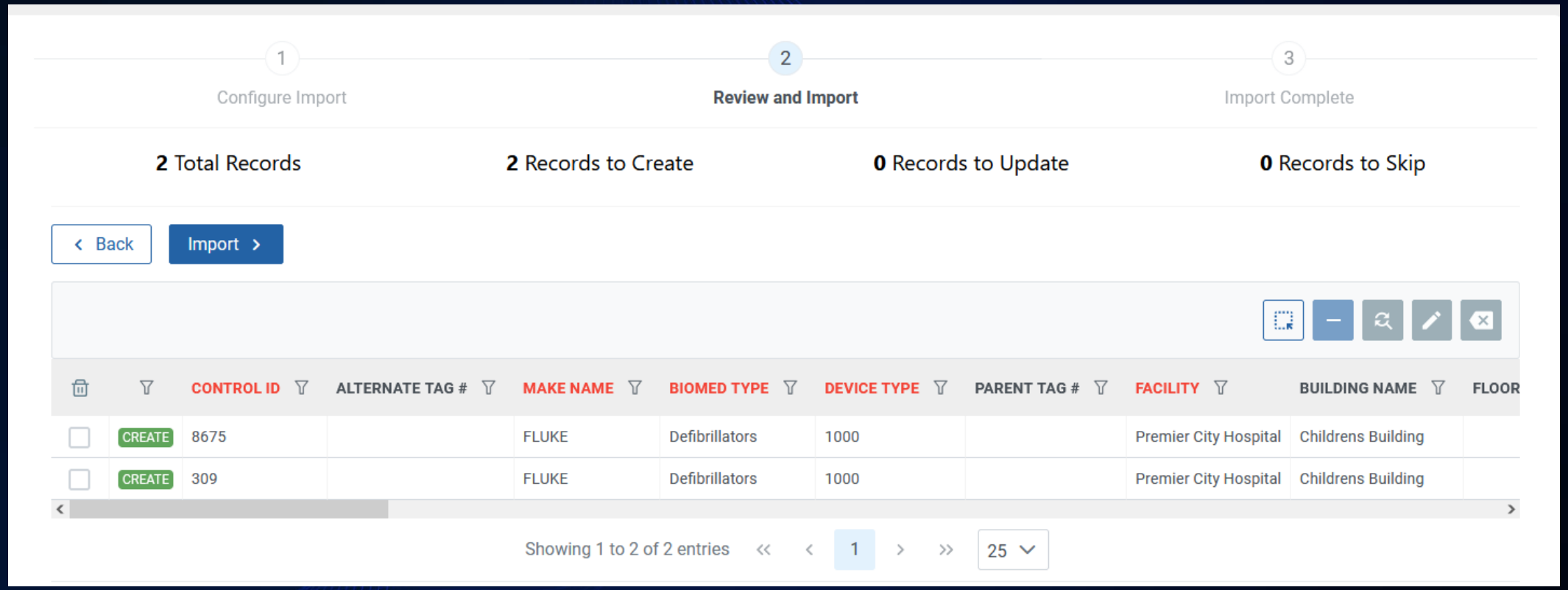




Once you've selected the file, confirm it is loaded and select 'Next'

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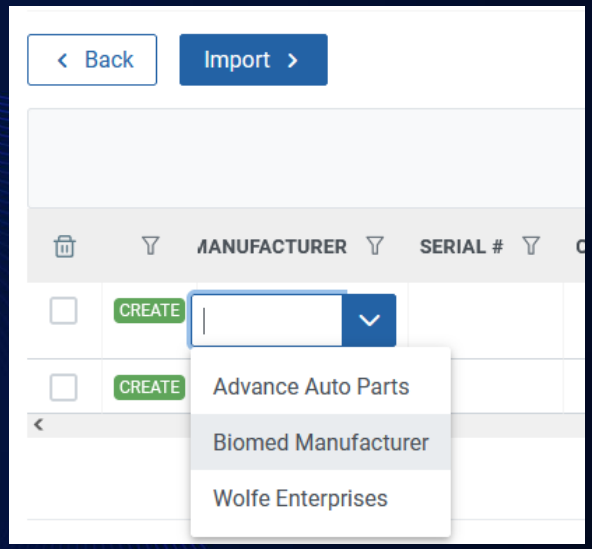
Validating your file

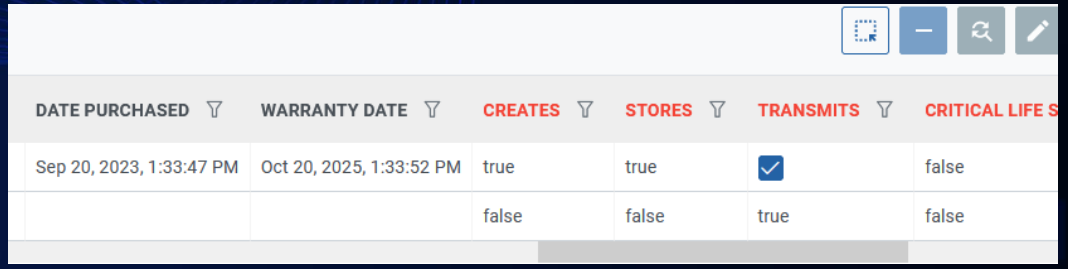


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Modifying the import

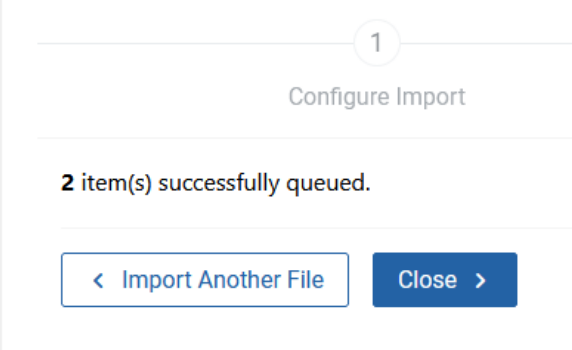
On the Review and Import page, not only can you modify your import, you can add information that is not included in the spreadsheet.



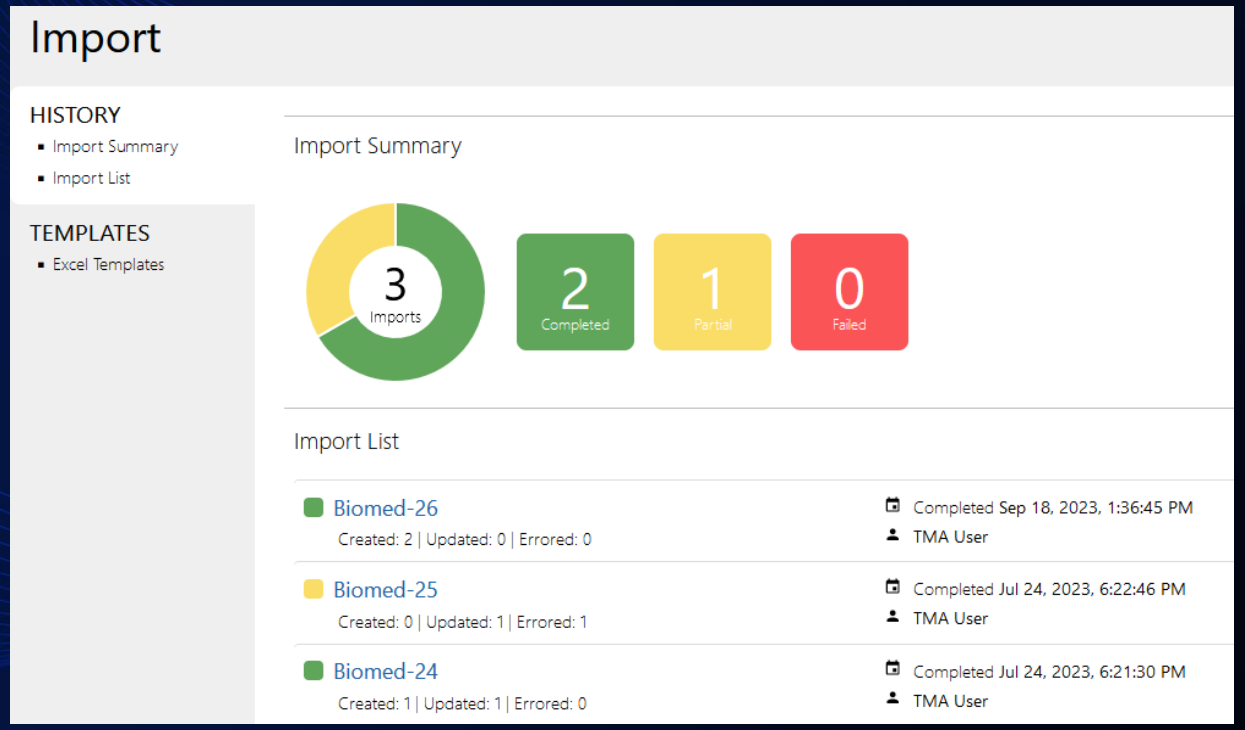


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Import complete



After hitting Close, you will be taken back to the import home. You will see the end results on that page and you should now see your import in WebTMA 7.



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Thank You / Q&A

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