



UC25 | April 8th - 10th 2025

# I Will Survive: Load Balancing Work in WebTMA

UC  
25 YEARS  
OF COMMUNITY, PARTNERSHIP, AND GROWTH

# Event Management - Presenters



**Darren Brown**

Director of Professional Services  
TMA Systems

Darren has been with TMA for over twenty-seven years. Before TMA, Darren served in the United States Air Force with a maintenance and IT background. During Darren's time with TMA, he is experienced in initial sales, implementation, and ongoing support. His primary focus is Client Support and Professional Services. In his current role, Darren is responsible for overseeing large-scale projects and coordinating resources to ensure successful client implementations.



**Matt Sunday**

CSS Team Lead  
TMA Systems

I have been a Senior Consultant for 12 years at TMA where I traveled and installed WebTMA 5 and 7 for clients across the nation. I have recently moved to Client Support as a Lead for a team in that department.





# Agenda

1. Benefits to Load Balancing
2. Data Requirements
3. Load Balancing
4. Load Balance Summary
5. Load Balance Detail
6. Batch PM Update



# Data Requirements



# Data Requirements – Hours

01

## PM Schedule – Est. Time

PM Est. Time is the first place we look to get hours and supersedes Task Labor Standard and Average Time. This allows you to define at the actual schedule level the amount of time due to grouping, travel or obstruction variances.

02

## Task - Labor Standard

Labor Standard is the second hours field we evaluate in the hierarchy that represents the standard time it takes to perform the PM task. This supersedes Task Average Time.

03

## Task – Average Time (hrs)

The average time is the calculated as the average of the hours entered on a closed work order by task.



# Data Requirements – Frequency

01

## Intervals

Some intervals may not align to your compliance standard

02

## Compliance Standards

Most PM Compliance report are focused on either Daily, Weekly, or Monthly compliance. Dailies are unique due to daily challenges. Weekly could be used in a true Weekly only environment, however, they could also be used in organizations that manage their PM Compliance on a Monthly level.

03

## New Rules

A new way of building weeklies has been established that will allow you to create at ease reoccurring weekly by specified days. This is more like a daily, but you get to pick which days of the week to ignore. Also, the day of week has been combined with the week of month option. This should not impact load balancing.



# Data Requirements

## Report Filters

1

No Meter-based PMs

2

Floating PMs?

3

Identify which cycle you are using

4

Identify at what level you are reviewing: Tech, Trade or No Trade.





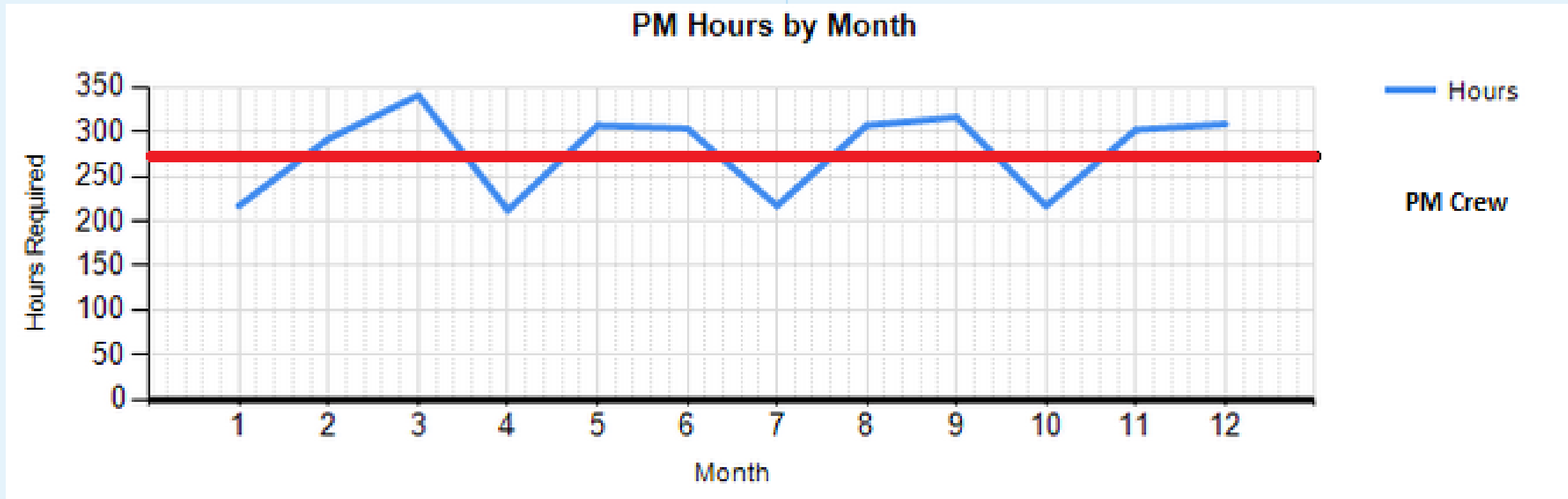
# Load Balancing

## Summary and Detail



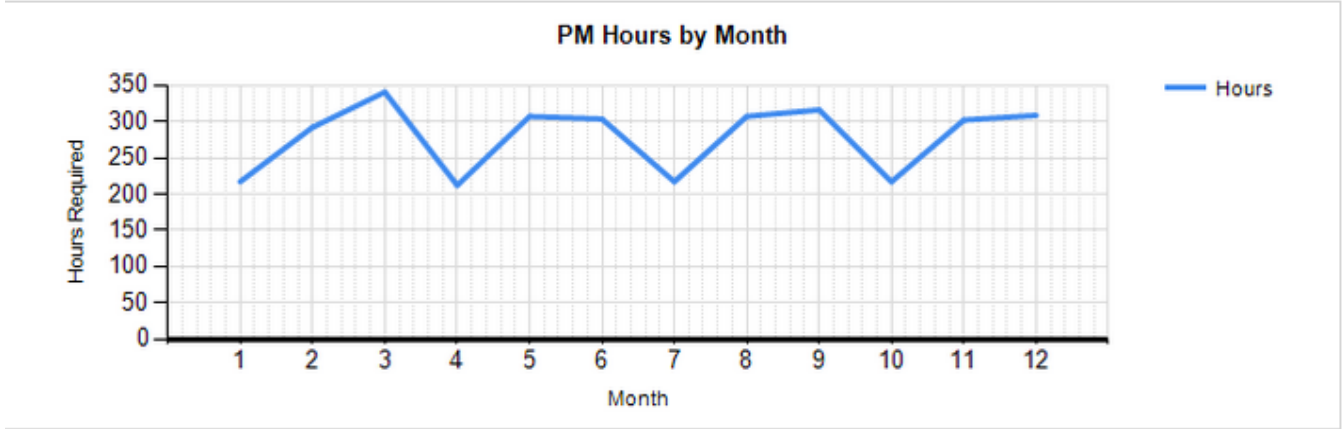


# Why is PM Load Balancing necessary?



# Summary Report

## PM Load Balance Summary by Trade



HVAC	Month	Hours
	1	217.00
	2	292.00
	3	340.50
	4	212.00
	5	307.00
	6	303.50
	7	217.00
	8	307.00
	9	316.00
	10	217.00
	11	302.00
	12	308.50

- Hours by Cycle
- Perfect World
- Reality



# Detail Report

## PM Load Balance Detail by Trade

Task Code	Task Desc.	Item Type	Tag #	Tag Desc.	Next Date	Month	Interval	Frequency	Location	Loc. Type	Dept.	Hrs
1603	Air Handling Unit - Quarterly	Equipment	10000-02	Air handler	1/6/2023	1	3 Month		SUR	Building Code		
1603	Air Handling Unit - Quarterly	Equipment	10000-02	Air handler	4/6/2023	4	3 Month		SUR	Building Code		
1603	Air Handling Unit - Quarterly	Equipment	10000-02	Air handler	7/6/2023	7	3 Month		SUR	Building Code		
1603	Air Handling Unit - Quarterly	Equipment	10000-02	Air handler	10/6/2023	10	3 Month		SUR	Building Code		
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	1/6/2023	1	2 Week		50	Building Code		2.50
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	1/20/2023	1	2 Week		50	Building Code		2.50
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	2/3/2023	2	2 Week		50	Building Code		2.50
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	2/17/2023	2	2 Week		50	Building Code		2.50
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	3/3/2023	3	2 Week		50	Building Code		2.50
P1612A	Annual, Air-Cooled Condenser	Equipment	10000b	Air handler	3/17/2023	3	2 Week		50	Building		2.50

- Use excel format
- Look at peak months
- Determine What Can Move
- Seasonal first
- Non-Seasonal last



Organization < Task < Records


# Batch PM Update



FileTransactionsMaterialAccountingOrganizationAdminReportsHelp

WebTMA7

BATCH PM UPDATE

Fast Find - Search

★

Action Menu

General Information

New Browse Selection

<input type="checkbox"/>	Item Tag	Est Time	Item Type	Repair Center Name	Department Name	Task Description	Next PM Date
<input type="checkbox"/>	.MAIN		Building	12345455		General Carpentry Work	03/11/2025
<input type="checkbox"/>	.MAIN-a_TEST		Area	25-CENTRAL		Construct/Build	03/11/2025
<input checked="" type="checkbox"/>	005		CEEEquipment	25-CENTRAL		1Y-Regional Buildings-Fire Drill-1st Shift-NC-MR	11/30/2025
<input type="checkbox"/>	006		CEEEquipment	25-CENTRAL		General Carpentry Work	12/31/2025
<input type="checkbox"/>	03-Office B-19326		Building	12345455		General Carpentry Work	03/07/2025
<input type="checkbox"/>	03-Office B-19326		Building	Biomedical Facilities		1Y-Regional Buildings-Fire Drill-1st Shift-NC-MR	10/25/2030
<input type="checkbox"/>	100		Equipment	25-CENTRAL		Task with Trade2	04/01/2026
<input type="checkbox"/>	100		Equipment	12345455		Construct/Build	04/27/2025
<input type="checkbox"/>	100		Equipment	12345455		1Y-Regional Buildings-Fire Drill-1st Shift-NC-MR	03/27/2026
<input type="checkbox"/>	100		Equipment	Eric Test RC		Construct/Build	04/28/2025
<input type="checkbox"/>	100		Equipment	EHS RC		General Carpentry Work	05/12/2025
<input type="checkbox"/>	100		Equipment	25-CENTRAL		General Carpentry Work	03/11/2025

1250

Items per page

Select Page

Items Selected: 1

Remove Selected

Mass Update

PMSchedule Mass Update

UpdateCancel

Update Fields Option

General

Include

New Value

☐Active☐

☐Repair Center...

☐Work Order Type...

☐Priority Description...

☐Trade...

☐Department...

☐Account #...

☐Rate Schedule...

☐Warehouse Name...

☐Technician Code...

☐Crew Name...

Scheduling Options

Include

New Value

☐Est. Time

☐Days To Complete

☐Next PM Date

FixedFloating

Every

Day(s)

Update

Cancel





# Thank You / Q&A

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