

Lean on Me: Optimizing TMA's User Forum & Knowledgebase Best Practices

Unlock the Value of the WebTMA User Community



Introductions



Melissa Qualkenbush

Facilities Help Desk Manager

Dallas College



Moses Gomez

Senior Systems Analyst

University of Texas –
San Antonio



Greg Shell

Chief Operating Officer

TMA Systems



John Kurtzweil

Sr. Manager of CSS

TMA Systems



Matt Sunday

CSS Team Lead

TMA Systems





Agenda

1. WebTMA Community Overview
2. Welcome to the new User Forum
3. The WebTMA Knowledgebase
4. Live WebTMA Webinars
5. User Conference
6. Support Process Overview
7. NPS Survey



WebTMA Community Overview

1

User Forum - Clients helping clients through the WebTMA User Forum

2

WebTMA Knowledgebase – Articles on system usage, product release notes, video archive , on-premise install packages

3

Webinars and UC – Live interactive opportunity to deep dive into popular WebTMA topics

4

Support – When in doubt, reach out to the WebTMA support team.



WebTMA User Forum

- User forum has been hosted by Group.io
- List Serve functionality allows members to post questions and receive feedback via email replies
- Clients have helped other clients troubleshoot issues, share SQL examples, share operational documentation/best practices and more
- 400+ members signed up with 40+ regular contributors

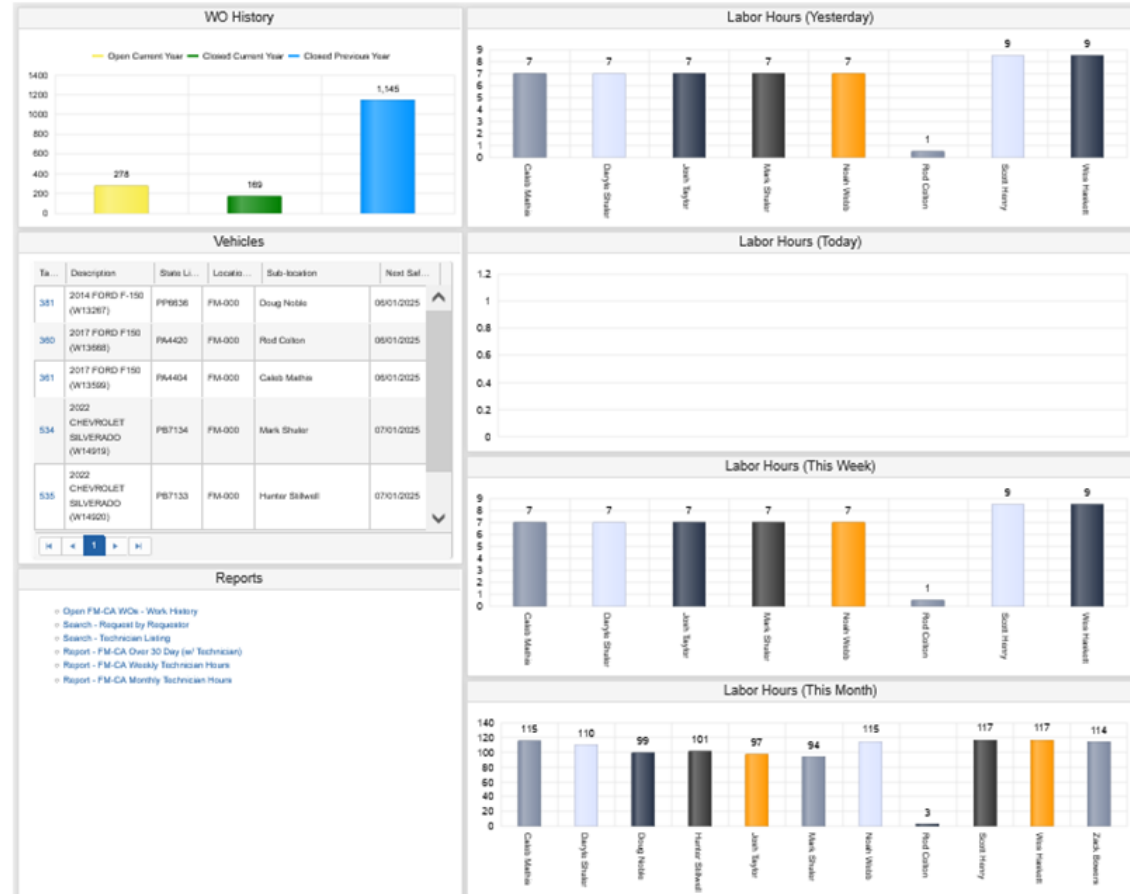
**Over 6,000
topics with
24,600
posts since
May 2001**



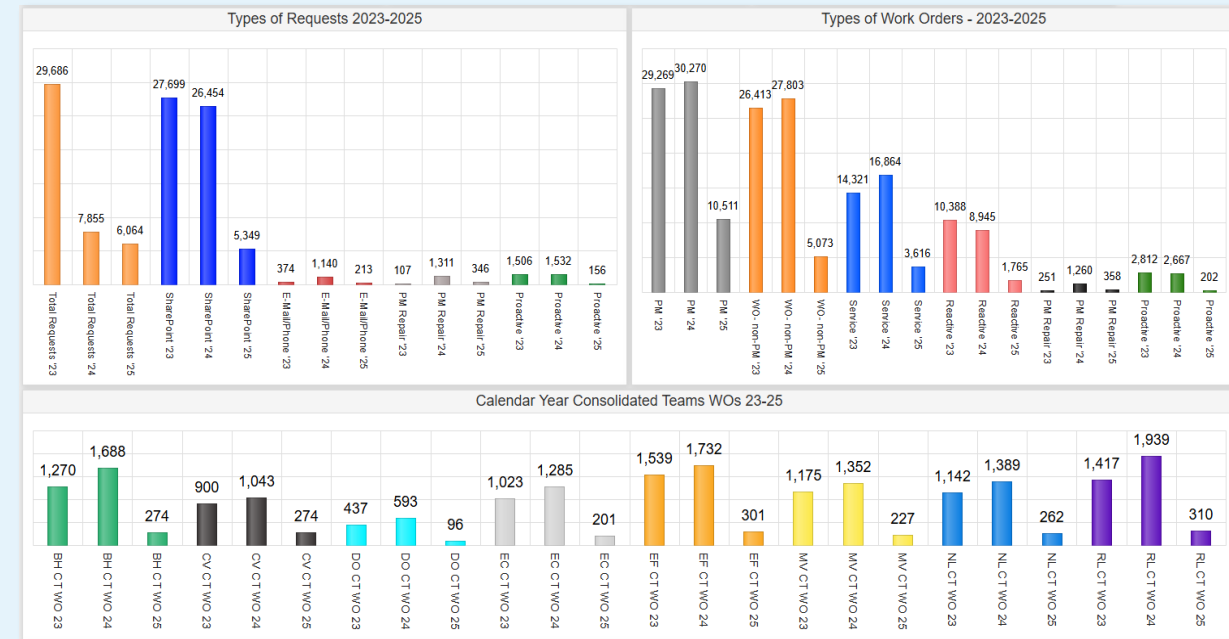
User Forum Examples – Dallas College

What Dallas College Saw on Forum...

This is an example of a dashboard I setup for the shop to track labor as well.



What They Built as a Result...



User Forum Examples – PM Task Management

Brent Critchley – Greece Central School District

We have a current PM task that is assigned to our bus fleet of 250 vehicles. This task is being changed and made into a task that has master checks so the technicians can complete it and record data using their mobile devices.

My question is, the task right now is going to be replaced with 1 of 2 different tasks (One for vans and one for large buses).

What would be the best route to replace the existing task per vehicle, but not lose the schedule that is in place for the current task as far as the next due date etc..

- If it were me.... I would deactivate the current task and create two new tasks. Thus keeping things clear for statistics/metrics. If you have custom reports that involve the current task, modify those to accept input for a single task code or an option to include both. You know with those new codes that the data in the report will begin after their creation. If you need history you know right away to use only the old deactivated task code for your search criteria, knowing it is for all vehicle types back then. Graham Houser – University of Illinois
- If you copy the original task for the two new tasks, the schedules set up on the PMs tab will copy over to the new tasks. From there, you'd just need to apply the master checks to the right task. Kimberly Kelley – Epic Software



User Forum Examples – Capital Planning Webinar

Chris Bullock– Western Carolina University

Wondering if anyone utilizes Capital Planning or Capital Projects modules. We currently utilize OneNote but need to look at transitioning away. Any advice that someone could provide would be appreciated.

- Dallas College uses the Capital Planning Module and would be happy to schedule a meeting time with you to discuss if needed! Feel free to e-mail me directly. – Melissa Qualkenbush – Dallas College
- We are also looking at the Capital Planning module and would like join the meeting, if possible. – Daniel Mahn – Gathering Place
- I too would like to be added to the list of interested parties. Paul Neumeyer – Nationwide Children’s Hospital
- I would like to be added to the list of interested parties – George Salem – Miami University
- I am also interested. Can you send me the link? – Gia Gowan – Harding University
- Many, many other replies wanting to participate!



User Forum Examples – WebTMA Upgrade Lessons Learned

Melissa Porter – University of Portland

We have our launch date approaching for TMA 7, and I'm trying to figure out the best way to prepare all of my main TMA users with the transition. Any tips or advice on how to prepare our teams? For background, I have a small team of work controllers who assign requests to trades with their appropriate tasks (this will be easy to train), and then each of our trade supervisors has a dashboard where they assign work orders to their technicians, review notes, add labor, parts, materials, etc so they need a more detailed training. My folks get pretty nervous about changes like this and I don't want to answer the same questions a million times, so some set trainings before and after the migration seems like the best option to me. I'm also trying to determine how early to give them access to the test environment. Anyone willing to share what they did, what they wish they had done, and advice on this process?

- We conducted a series of targeted TMA training sessions for our test group, which included participants from various departments. We then developed guided test cases tailored to each group's specific usage. This ensured that each department had a few representatives familiar with the new system, which allowed us to identify and address bugs early in the process. Afterwards, we had hands-on technical training sessions one week prior to the product launch for the techs. This multi-layered support structure helped, as it established a network of super users within each department, along with support from work control and FM Technology. Maisara Abebe– UNLV
- First... Tell them: "It's still TMA and it works the same way. Sure, it looks somewhat different and some things have moved, but all your stuff is still there. So don't be worried and the transition will go smoothly." – Graham Houser– University of Illinois
- I would familiarize myself with the the Tutorials under Help (see below), then share with the team. Kimberly Pettway



User Forum Examples – Process Documentation for Time Entry

Eileen Brown– Northern Arizona University

Hey everyone! I'm reaching out to see if anyone has any current process or procedural documentation regarding technicians adding labor to work orders in TMA. Specifically, I'm looking for information on:

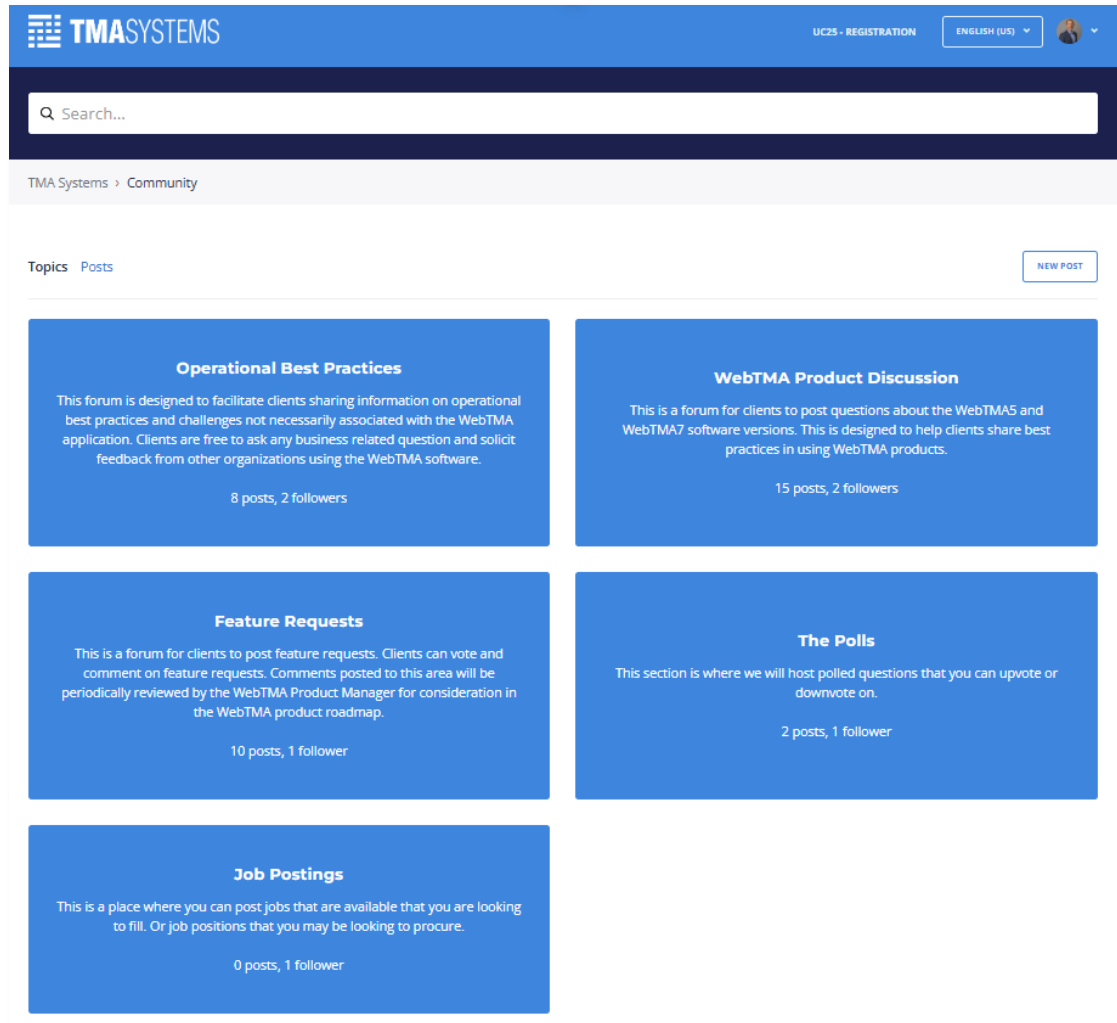
- The timing of when labor should be entered.
- Ensuring all labor is accounted for.
- Whether everything is charged, including any minimum trip charges.
- Procedures for technicians marking work orders as finished after entering labor.
- Any defined time frames for how far back technicians can add labor to work orders.

If you have any policies, workflows, or best practices on these points, I'd greatly appreciate it if you could share. Thank you in advance for your help!

- This is what Dallas College does. Hopes this helps
 - The timing of when labor should be entered. We use iPads for our technicians which give them the ability (and accountability) to enter their start time & end time in real time. Start the work = start the time, Stop work = Stop time
 - Ensuring all labor is accounted for. Setting the standard based off of available time in a working day. 8 hours in a working day minus 1 hour for lunch & 2 30 min. breaks. 6 hours a day must be accounted for which are monitored by the supervisor on the dashboard
 - Whether everything is charged, including any minimum trip charges. We have not begun this process as of yet
 - Procedures for technicians marking work orders as finished after entering labor. The expectation is a WO should have a 3 day turnaround time. If the WO takes longer than 3 days, the expectation is documentation as to why. Anyone should be able to open any WO & know where we are at in the process
 - Any defined time frames for how far back technicians can add labor to work orders Once the WO is closed, no labor added. This can be changed though by re-opening the WO but ONLY the Facilities Help Desk Team (5 people) has the ability to reopen a WO to minimize the 'back & forth'.
- Melissa Qualkenbush – Dallas College



Introducing the new WebTMA User Forum



1

Product Topics

2

Operational Topics

3

Voice of the Customer – WebTMA Enhancement submission and voting

4

Polls and Job Posting

Why move from Group.io to Zendesk

01

True User Forum, not Email List

The email reply nature of Group.io makes it very easy to participate but is also extremely unstructured. Topics and replies get lost overtime even though they would be very valuable for new members. Zendesk gives us the structure we need to incorporate community contributions into our knowledgebase

02

Single System

When your user is created for support, you are automatically added to the user forum. Single system to search for help returning both knowledgebase articles and community contributions in one single result.

03

Provides Additional Functionality

We will be able to add enhancement submission/voting to the user community along with job postings and polling.



Zendesk Next Steps & Timeline

- All authorized support users will be activated for the new user community later today.
- Any active group.io user who is not an authorized contact will be loaded tomorrow and you will receive an email to activate your account.
- There was no way to automatically move all Group.io emails into forum topics and posts but we have moved a few of the more popular posts to get started.
- We will keep Group.io running until the end of March just in case user would like to search any old topics
- During this time, we will try to convert as many popular topics to Zendesk as possible.

TMA Systems > Community > WebTMA Product Discussion

Printing Inventory Parts Sticker labels



Greg Shell
3 days ago



UNFOLLOW



I have a question. I have a Zebra Technologies label printer that we use to print labels for our inventory items. We have transitioned from client to SaaS and are planning on moving to 7 next month. We noticed that when we tried to print labels for any new items we created in SaaS, the printer would not print them. Our IT dept froze our previous inventory items and they can still print but not the new ones. I am afraid that when we move to the SaaS v 7, they will not work either. Who out there uses a label printer for their inventory and what make or model do you have? Please help. This is from our IT person:

We use a specially configured MS Access database label "app" that uses an ODBC connection to the WebTMA SQL database server to look up part number information and print out to the Zebra printers. We don't do QR codes but barcodes (that don't work anymore for reasons beyond my understanding). When you moved to the cloud, you lost ODBC access to the database server. The only reason you're able to do it currently is because I left the local (aka "client hosted") database server running so that the label printer "app" could connect to it via ODBC and pull down the info for printing.


Gia Gowan

Comments

8 comments

SORT BY ▾




 UC25 - REGISTRATION CATEGORIES ENGLISH (US) SUBMIT A REQUEST

Search the Knowledgebase

SEARCH

Popular: [work order](#) [WebTMA7](#) [reporting](#)



Community

Join discussions with other WebTMA Clients

Article Categories

Release Notes

Admin

Additional Modules

Reports

Accounting

Materials

Organization

Transactions

General

Webinars

Product Downloads
In order to access the links for the installer packages you must be logged in.

Promoted articles

WebTMA5 to WebTMA7 On-Premise Upgrade Guide
WebTMA 5 to WebTMA 7 Upgrade Guide The upgrad...

WebTMA7 On-Premise Installation and WebTMA7 Upgrade Guide

On-Premise WebTMA 5 to 7 Upgrade Guide and Upgrade Utility Tool Demo

- The TMA Systems Knowledgebase is home to all for Knowledge Articles, Webinars, and Video Articles.
- Quickly Search for articles Including Release Notes, Product Information, System Requirements, and more.
- Requires login for Secure Download of files, Submitting requests to support, and Historical Ticket Review (My Activities).
- New User Community link.
- Promoted Articles at bottom for quick navigation.



Live Webinar Schedule



Webinar Training Schedule 2025

Service Requests, Redefined

January 21, 2025 11:00 am CST

Presenter - Adam Deatherage

Watch On Demand

WebTMA Administrator 101

February 11, 2025 11:00 am CST

Primary Presenter - Amanda Burczyk
Co-presenter - Andy Jeremias

Register Now

WebTMA Mobile

February 25, 2025 11:00 am CST

Presenter - Eric Szlezak

Register Now

Unlock the Value of the WebTMA
User Community

PM Consolidation, Scheduling
and Load Balancing

Exploring the Analytics Module

May 20, 2025 11:00 am CST

- Twice monthly (most months) – We conduct a 1 hour webinar on a popular WebTMA topic/feature
- We post a question to the User Community in October on topics they would like to see in the upcoming year
- There is no cost for clients to attend and we encourage as much participation as possible in the live event.
- Each session is recorded and then posted on the WebTMA Knowledgebase (<https://knowledgebase.tmasystems.net/>)
- The schedule of upcoming sessions can be found at <https://www.tmasystems.com/webinar-training>. You can register for events on this page as well and receive reminders in advance of the webinar.



Support Process Overview

Zendesk Support Options

TMA Systems, LLC | John Kurtzweil | Open Incident #111668

Ticket updated [Show more](#)

Brand: WebTMA

Requester: John Kurtzweil

Assignee*: WebTMA Tie.../John Kurtzweil

Followers: 0

Organization: TMA Systems, LLC

Form: WebTMA

Tags: 3 X agent_copilot_enabled X intent_software_data_cant_edit X intent_confidence_high X language_en X language_confidence_high X sentiment_neutral X sentiment_confidence_high X + 5 more

WebTMA Product Version*: WebTMA 7

WebTMA Feature*: Transactions-Work Order

Category*: Training

Priority*: Normal | Type*: Incident

Can't edit a work order after posting transactions

View ticket summary

John Kurtzweil less than a minute ago

To: John Kurtzweil [Show more](#)

Hi, I am trying to edit a work order in our WebTMA system, but the edit button is grayed out. Is there something that I need to configure differently to get this to work?

Best Regards,

John

John Kurtzweil
Senior Manager of Client Support
TMA Systems
Join Me at UC25 in April 2025

TMA SYSTEMS
CELEBRATING
25 YEARS
OF COMMUNITY, PARTNERSHIP, AND GROWTH

- Email support at support@tmasystems.com
- Option to submit support request on the Knowledgebase.
- Your incoming ticket is automatically routed to best available agent for working with your request.
- Review ticket history (open and closed) using the My Activities option on the Knowledgebase.
- Zendesk Uses AI to suggest solution articles on every ticket submitted.



Support Process Overview



- SLA of 30 minutes first response time.
 - Support Team Structured for quick assessment of issue and turn around. Includes Team Leads, Tier 1 Agents, and Tier 2 agents on every ticket if needed. Also, SME assistance from around the company when needed.
 - Urgent matters can be escalated for expedited resolution from engineering.
 - CSAT survey sent out on each ticket for you to give feedback on your support experience.
- **Importance of giving feedback** – We strive to listen to our clients' questions and concerns and will do everything we can to accommodate these. So please give us your feedback as often as you can on the requests that you submit to support.



NPS Surveys

- Annually TMA Systems sends a very short Net Promoter Score (NPS) survey to all primary contacts at each client
- Surveys are spread evenly throughout the year versus sending to all clients on the same day
- Approximately 22% of surveys sent are answered
- Provides incredibly valuable information to our company on where we are doing well (keep it up) versus where we need to improve (change direction)
- If you are not receiving the annual NPS survey, please let us know (AM, support ticket, etc.). We want to increase participation as much as possible and might be an indication that other emails aren't getting to you

All questions marked with * are required.

1. How likely is it that you would recommend TMA Systems to a friend or colleague? *

0 1 2 3 4 5 6 7 8 9 10

2. How would you rate TMA Systems in the following categories?

	Very Poor	Poor	Neutral	Good	Excellent
Product Features/Usability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
System Performance – Speed and Uptime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Self Help Tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
CSS Agents/Help Desk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Professional Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Renewal Process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Billing/Invoicing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



Thank You / Q&A

UC
25 YEARS
OF COMMUNITY, PARTNERSHIP, AND GROWTH

What's Next

BLOCK PARTY: 7 PM

Join us while we take over American Solera and Cabin Boys Breweries for an epic block party! Live band, yard games, burgers, brats and much more!

Shuttles will run all night between the Hyatt & the block party every 20-30 minutes.