WebTMA
Cumulative Release Notes
2022

This document contains Release Notes for v7

December 2022

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Contents

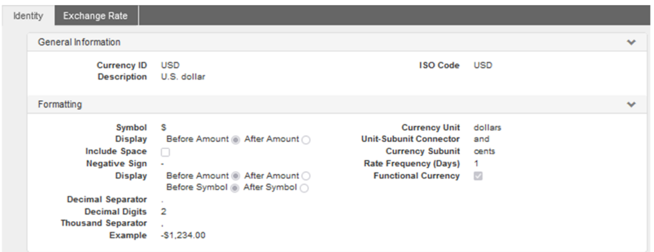
December 13, 2022

Customer Survey Redesign

Path: *Organization > Repair Center > Records/ Customer Survey*	**Summary:** The Customer Survey page has a new look and feel with a clean, easy-to-view appearance.. **Discussion:** The Customer Survey Tab remains the say; however, users see a more streamlined survey. The appropriate Repair Center logo can be displayed along with introductory text. Sizing can be narrow enough to fit on a phone or expanded for other devices.

November 29, 2022

Multi-Currency Module Available for WebTMA Plus



Path: *Accounting > Currency*

Summary: The Multi-Currency module allows you to view and save currency data in more than one currency.

Discussion:

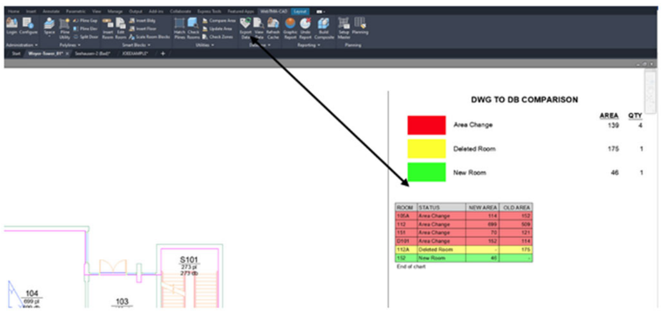
Using Multi-Currency settings, you can see commonly used currencies in records and reports. During setup in *Admin > Client Info / Preferences*, you designate a Functional Currency for entering data. This standard currency can be converted to a different currency.

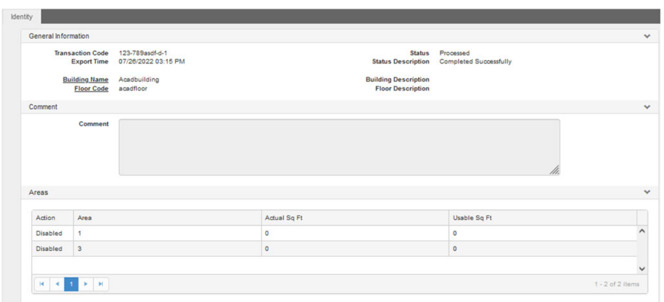
The *Currency > Identity* Tab includes settings for the currency symbol and the other options that apply to the way different currencies display. The *ISO Code* is required to assure accuracy in Currency reports.

The *Currency / Exchange Rates* Tab is used to enter and edit other currencies with the latest exchange rate. Entries on the Tab are required to convert the Functional Currency to a different currency.

November 8, 2022

Import AutoCAD Changes to WebTMA Using New Module





Path: *Admin > CAD Import*

Summary: If you use AutoCAD drawings in your organization, you can import changes made to your drawings and update the related WebTMA Area records.

Discussion:

AutoCAD licensed users who have the WebTMA-CAD plug-in installed can purchase a license for the new module. In addition to the Space Management WebTMA license, you need users with appropriate API permissions to import the changes.

When all requirements are met, you can link your AutoCAD floor plans to WebTMA.

When floor plans are updated in AutoCAD, you can export the data to WebTMA and review details before you decide to update any Area records in WebTMA.

Inspection Findings Module Added to Capital Planning

Path: *Transactions > Request > Inspection Findings*

Summary: Inspection Findings allows you to perform Safety and Condition assessments that can be translated into Projects, Audits, and Work Orders.

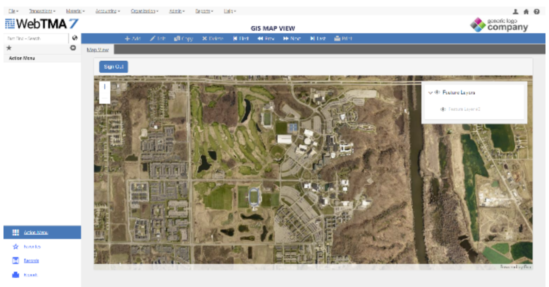
Discussion:

Inspection Findings is similar to the *Request Log* window, but Inspection Findings have their own list of Request Types.

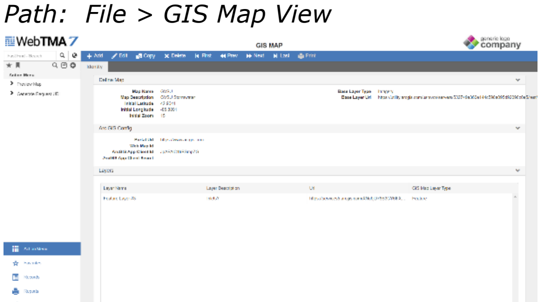
To make a new Request Type available in the *Inspection Findings* window, go to *Lookups > Request Type* and mark the *Inspection Findings* check box.

October 25, 2022

GIS Module ArcGIS Maps Provide Better Experience



Path: *File > GIS Map View*



Path: *Admin > GIS > GIS Map*

Summary: You can set up your ArcGIS credentials from *Admin > GIS > GIS Map*.

Discussion:

Integration with ArcGIS provides you with a more customized GIS Map experience. ArcGIS enables you to add more features and imagery to your map to better meet the needs of your organization.

NOTE: In order for ArcGIS Map View to function properly, map settings must be configured in *Admin > GIS > GIS Map*.

Budget Code Fields Added for Three Universal Interface Import/Export Transactions

Summary: Budget Code is now a selection in the column *Entry* flyout of the optional Universal Interface module for some Transaction Types.

Discussion:

A *Budget Code* field was added to the flyout that opens if you select *Add Item* for Purchase Requisitions or *Add Purchase Order Line* for Purchase Orders. The field was also added to the *Lookups > OTP Types* window.

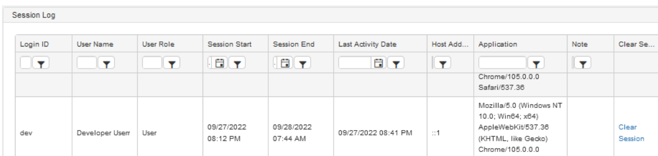
Budget Code is now a selection in the column *Entry* flyout of the optional Universal Interface module for the following Transaction Types:

- UPI - Purchase Order Import
- UPI - Purchase Requisition Export

- UPI - Receivings Export

October 11, 2022

End (or Review) Login Sessions Using New Session Log Tab



Path: *Admin > Client Info / Session Log Tab*

Summary: View or end a user's login session from this new tab in *Client Info*.

Discussion:

The *Session Log* Tab displays historical (inactive) and current (active) login sessions. Active logins do not display a date in the *Session End* column.

Filter the lines using the fields at the top of each column.

Use the *Clear Session* link in the right-most column to end an active session, i.e., log out the user. When you select the link, the *Session Log Message* flyout opens to accept your notes on the reason the session was ended.

The message displays in the *Notes* column. The notes can be revised, and the new text replaces any existing notes. If an active session is cleared, the person will have to log in once more to use the application.

A *Last Login List* report is available from *Reports > Report Manager / Management*. It displays logins based on the number of days since the user last logged in to the application.

More Columns Added to Requestor Login Status

Path: *Request Status Browse*

Summary: The redesigned *Requestor Login Status* window now has additional columns that can be selected to display in the *My Work History* Section.

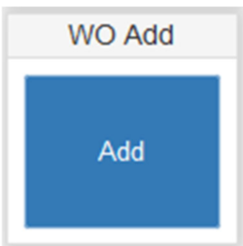
Discussion:

The following columns can be added to the display if needed:

- Labor Cost
- Material Cost
- Other Cost
- Total Cost
- Priority

September 27, 2022

Added My Dashboard Control to Open WebTMA Windows in Add Mode



Path: *My Dashboard*

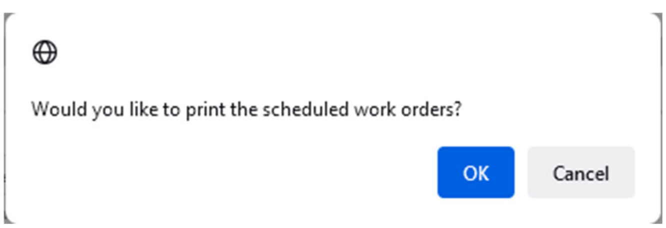
Summary: A new *Add Item* Control gives you a quick way to open frequently-used windows in *Add* mode.

Discussion:

System Administrators can easily create these new controls. All that is needed is that you add a *Name*, which displays as the title of the control, and select the desired window. The example at left opens the *Work Order* window.

Once the new control is saved to a Tab, the user can choose the icon and open the window in *Add* mode – on a separate browser tab.

Enhanced Scheduler Options to Print Work Orders



Path: *Transactions > Time Manager > Scheduler*

Summary: You now have several options to print Work Orders from the *Scheduler* window.

Discussion:

When you select the *Save* button on the *Schedule Entry* flyout as well as *Save* on the WebTMA toolbar, a message pops up with the option to print.

In addition, you have a *Print* link on the Action Menu.

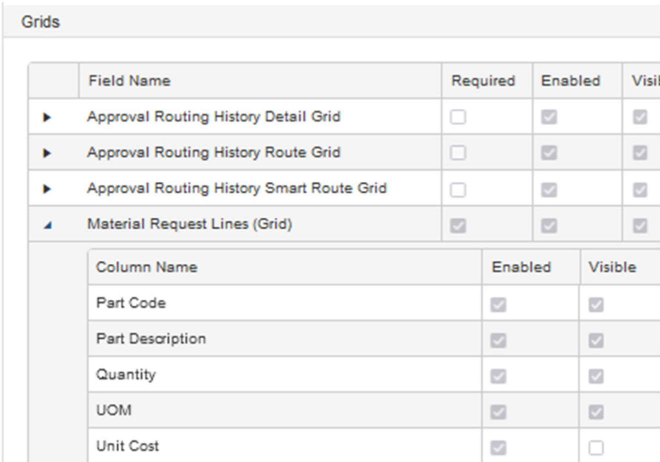
Added Option to Hide Columns on Material Request Grid

Summary: System Administrators now have the option to show or hide grid columns for Material Requests. This applies to both *Requestor Login* and regular *Login* windows.

Discussion:

Previously, System Administrators could amend the *Material Request Entry* flyout in the *Pages* Section and hide fields such as *Unit Cost*. However, they could not hide the corresponding column in the grid on the *Material Request* window.

With this addition to System Form Attributes, columns can be hidden as well.

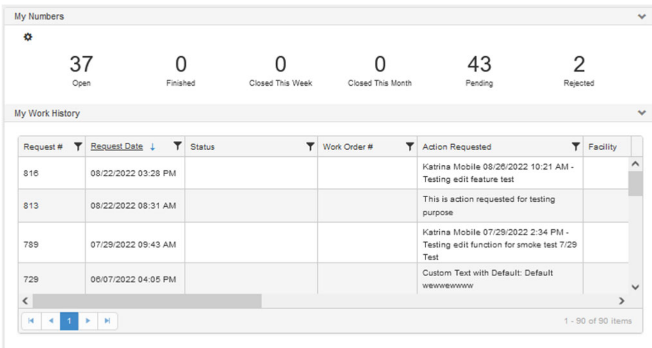


Path: *Admin > Form Attributes > System Form Attribute / Material Request – Material Requests*

In the *Grids* Section, expand the *Material Request Lines (Grid)* and clear the *Visible* check box for columns that you do not want your users to see.

September 13, 2022

Requestor Login Status Browse Enhanced



Path: *Request Status Browse*

Summary: The *Requestor Login Status* window has been redesigned with dashboard features that make it easier to use and more informative.

Discussion:

The new design has only two Sections. The upper Section, *My Numbers*, shows values for the options of your choice. You make the selections when you choose the gear icon at the upper left.

Select a value of interest to view a flyout that shows each item. Buttons at the bottom of the flyout allow you to export to Excel.

The *My Work History* Section is made up of a number of columns that can be sorted using the standard ascending/descending or filtered using the filter icon for specific searches. More columns may be added in the future.

NOTE: System Administrators have the option to add or remove controls in *My Numbers* or columns in *My Work History* using *System Form Attributes*.

GIS Map View Added

Path: *File > GIS Map View*

Summary: The new optional GIS module is a search tool to visualize your work orders and maintenance-worthy items on a map.

Discussion:

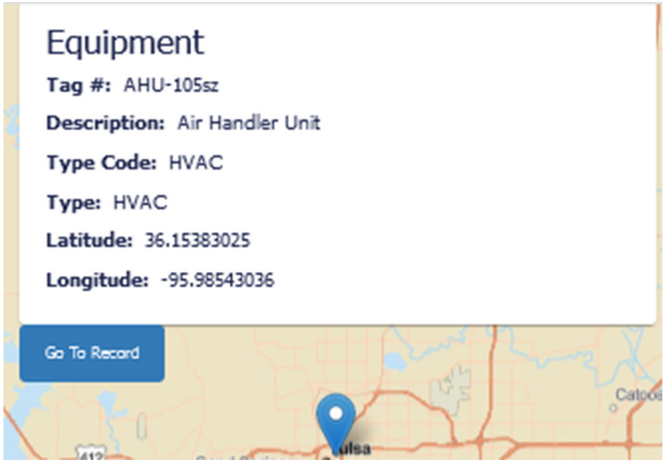
If your data is in a specific area, such as a city, the map zooms to that area when it opens.

By default, you see a Street view that includes records for Area, Asset, Biomed, Building Equipment, Facility, Work Order, and Vehicle. You have the option to clear some check boxes to filter the number of records represented or to change the view.

The different views (Street, Topographic, etc.) stem from the underlying Esri mapping software.

The various colored circles with values give you at-a-glance understanding of how many markers make up a cluster on the map. Green is a lower number and moves up to yellow or red.

Select a circle to see the markers. Choose the markers to view underlying information such as a list of work orders or an item record.



On the work order list, click a line to open the record.

For items or locations, click the *Go To Record* tab.

Note that the location or item records require entries for Latitude and Longitude to display on the map.

Added Ability to Import Latitude & Longitude Fields for MWI

Path: *Organization > Asset > Records*
Path: *Organization > Biomed > Records*
Path: *Organization > Entity*
Path: *Organization > Equipment > Records*
Path: *Material > Tools > Records*

Summary: To support the new GIS module, *Longitude* and *Latitude* fields are now available in the *Export Template* for import to the core maintenance worthy item windows.

Discussion:

You can now mass load Latitude and Longitude information that allows you to view the location of maintenance worthy items on the graphical maps. which are available in the system.

The *Export Template* Excel file now includes columns for Longitude and Latitude. The new columns are available from the following windows:

- Asset
- Biomed
- Entity
- Equipment
- Tools

Service Request Form Has New Selectable Field

Path: *Admin > Form Attributes > Service Request Form / Layout Tab*

Summary: Floor Description has been added to the *Layout Fields* flyout.

Discussion:

As you edit or create a Request Form, a new field, *Floor Description*, is now available on the *Layout Fields* flyout.

Keys Access Tab and Keys Related to Locks

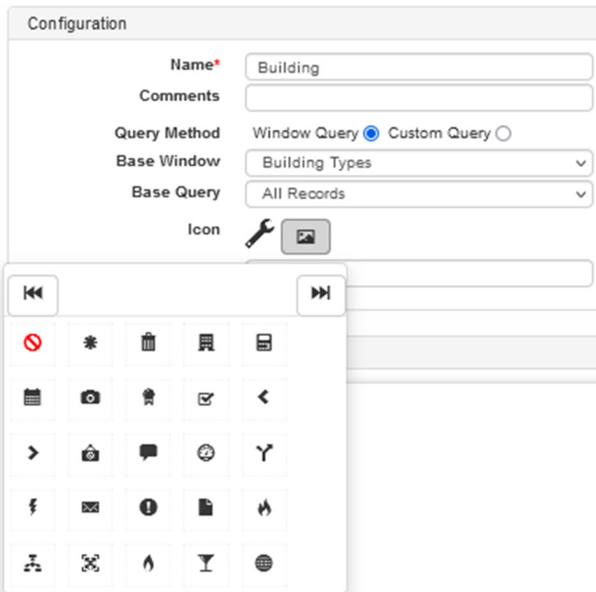
Path: *Material > Key Management > Keys / Access Tab*

Summary: Keys that are added to *Lock* window records display on the *Keys / Access* Tab.

Discussion:

When you delete the Key from the *Lock* window, the Key is removed from the *Keys / Access* Tab as well.

Executive Dashboard Digital and Dial Icons



Path: *My Dashboard*

Summary: Icons are easy to add or remove from the display. They provide at-a-glance signifiers about the control.

Discussion:

When you choose the graphic button on the *Configuration* flyout, WebTMA provides several pages of icons for your selection. With one click, the icon displays on the flyout.

Icons are removed just as easily. Simply select the red cancel icon at the upper left of the first drop-down page of icons.

August 23, 2022

Room Inspections Module Added

Path: *Areas > RI windows*	**Summary:** Inspect rooms at your Facility and record the presence and condition of assets. **Discussion:** The Room Inspections module is an electronic solution designed to allow you to design your own inspection points and values. Create multiple inspection forms unique to every type of room, record the results, and analyze them quickly. The module can be used by university housing departments to automate move-in and move-out inspections as well as by physical plant departments that make condition or safety inspections.

August 2, 2022

Maintenance Only

The August 2, 2022 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

July 19, 2022

Maintenance Only

The July 19, 2022 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

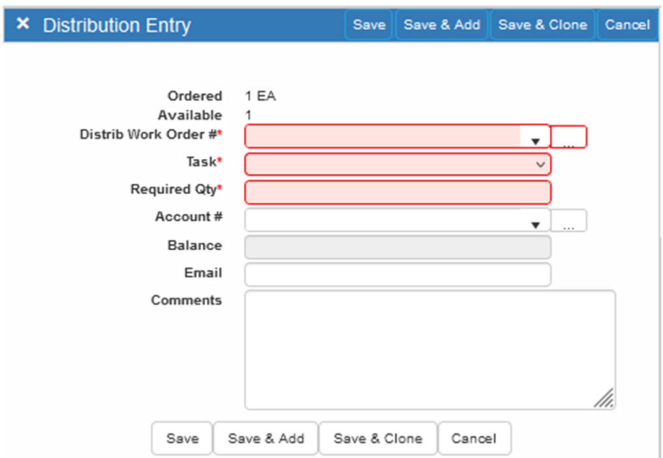
July 12, 2022

Maintenance Only

The July 12, 2022 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

June 21, 2022

Distributions to Closed Work Orders Enhanced



Path: *Material > > Purchase > Purchase Orders > Add Distribution–Distribution Entry*

Summary: Distribution Entry flyout drop-down respects decisions made by System Administrator regarding open distributions on closed Work Orders.

Discussion:

If your organization allows purchase distributions to remain open on closed Work Orders, the *Material > > Purchase > Purchase Orders > Add Distribution–Distribution Entry* flyout has been altered to display both open and closed Work Orders in the selection window.

If distributions are not allowed on closed Work Orders, the selection list does not display closed Work Order numbers.

UPI – AP Invoice Export / AP Payment Import Added to Universal Interface

Summary: A separate module to accommodate exporting invoices from WebTMA and importing payments is available with the purchase of the WebTMA IntAPInvoicePayment license.

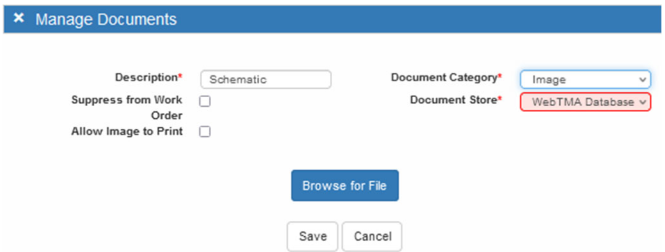
Discussion:

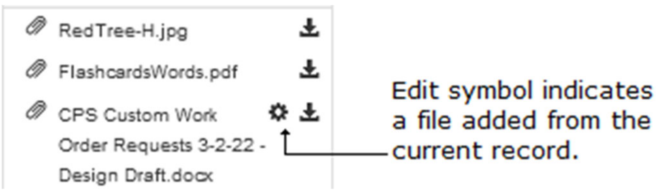
When you have this license, you can see the following selections on the *Transaction Type* drop-down menu.

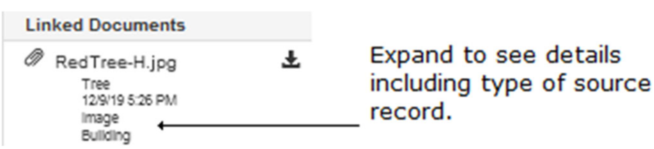
- UPI – AP Invoice Export
- UPI – AP Payment Import

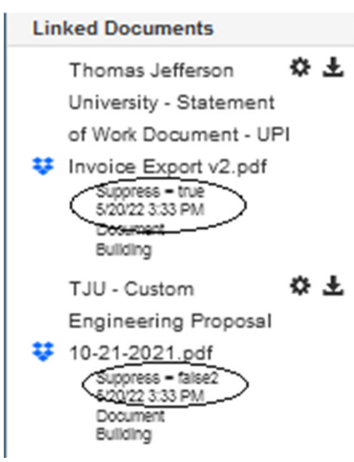
In addition to Column lists and other details, you can also find examples of JSON elements in the online help topic titled UPI-AP Import Export Web Service.

Linked Documents for Work Orders Enhanced









Summary: Many more Linked Documents can display with Work Orders in version 7. You have the option to suppress the documents from other modules if needed.

Discussion:

In version 7, the Linked Documents attached to many records can display with the Work Order in addition to files added from the Work Order. These are:

- Locations (Facility, Building, Area, Floor)
- Items (Equipment, Vehicle, Asset, Group, Tool, Entity, Biomed Equipment, IT Equipment, Linear Asset)
- Tasks
- Request Log

You have the option to prevent any of the eligible Linked Documents from displaying with the Work Order.

When you add a Linked Document to any of the eligible records from the list above, the *Manage Documents* flyout includes a check box to *Suppress from Work Order*. The check box applies to all *Document Category* selections except URL.

If you select *Image* as the Document Category on the Manage Documents flyout as illustrated at left, an additional check box is available. Mark the *Allow Image to Print* check box if you want the image to print with the Work Order.

On the Work Order window, WebTMA gives you visual cues about the source of a Linked Document. At a glance, you can determine whether the linked file is from a record other than the Work Order. Linked Documents added from the Work Order display the *Edit* symbol as illustrated at left.

For titles without an *Edit* symbol, expand the file title to see the source type.

Open the source record, such as a related Building record, and the *Edit* symbol is available to allow you to edit the Linked Document.

Any Linked Document on Item, Location, Task, and Request Log records can be expanded to indicate the suppress status.

Files added before this release can be edited to mark the *Suppress from Work Order* check box. If a file that was displayed on a Work Order is suppressed, it is removed from view after suppression. Be sure to refresh the Work Order record if it is open.

Report Writer Layout Tab – Changed Default

Path: Reports > Report Writer / Layout Tab

Summary: The *Report Writer / Layout* Tab default has been changed.

Discussion:

Previously, v7 *Report Writer / Layout* Tab defaulted to a *List* format. The default has changed to *Table* format.

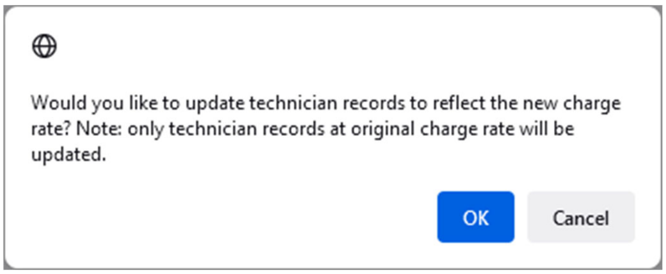
May 24, 2022

Hard-wired WO Browse Columns

Path: Transactions > Work Order > WO Browse	**Summary:** Certain columns will always display with a WO Browse query, regardless of user-selected columns. **Discussion:** WebTMA deems information in the following columns as critical: • WO# • Request Date • Task Code • Task Desc • Tag # • Tag Description These columns display even if the user has not selected them.

May 10, 2022

Batch Update Technician Charge Rates



Path: Organization > Repair Center > Trade / Identity Tab

Summary: A change to the *Default Charge* field on the Trade / Identity Tab gives you the option to update Technician records in Batch if they meet certain conditions.

Discussion:

If you have a number of Technicians with the same Trade, you have the option to update the Charge Rate for the Technicians in batch when you change the Default Charge on the Trade / Identity Tab.

When you enter a *Default Charge*, the popup pictured at left gives you the option to use a batch update.

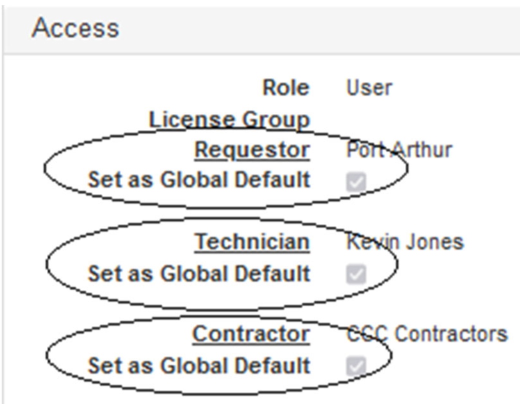
If you click *Cancel*, no Technician records are changed.

If you click *OK*, the Technician's *Charge Rate* is changed in either of the following conditions:

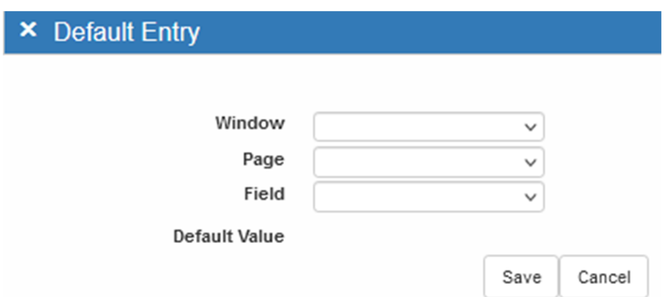
- Update the Technician's *Charge Rate* when their only Trade was just updated.
- Update the *Charge Rate* for Technician's with multiple Trades when their *Preferred* Trade was just updated.

April 26, 2022

Global Technician, Requestor, and Contractor Change



Path: Admin > User Management > Records / Identity Tab



Path: Admin > User Management > Records / Default Tab
Notice the *Global* check box has been removed.

Summary: New *Set as Global Default* check boxes have been added to the *Identity Tab–Access Section*. These settings apply to the logged-in user.

Discussion:

Previously, a *Global* check box displayed on the *Default Entry* flyout that opened from the *User Management > Records / Default Tab*. That check box has been removed.

You now have the option to establish a Global Default for *Requestor*, *Technician*, and/or *Contractor* on the *Identity* Tab. The new Global settings apply to all windows.

When a Global Default is set, the designated Technician, Requestor, or Contractor name displays throughout the application in fields with that label.

This is for your convenience. The name in the field can be replaced on any window if needed.

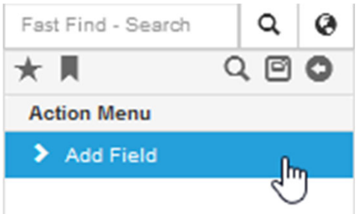
Add Default SSO User Group from WebTMA 5 to WebTMA 7

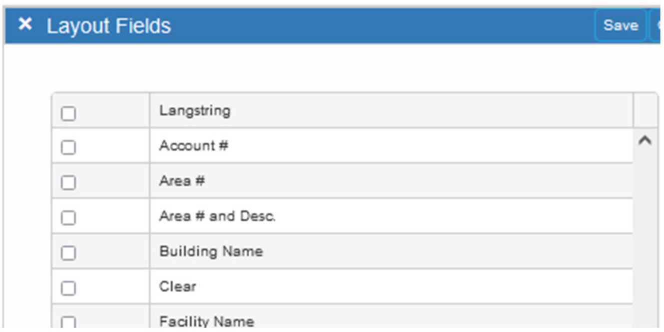
Summary: Just in time provisioning has been added to WebTMA 7 SAML.

You have the option to add a Repair Center from a flyout panel.

Choose *Behavior* as *Create Requestor* or *Create User*. A Repair Center grid is available, and you can add and save the Repair Center from that grid to the respective records.

Service Request Form – Field Selection Revised





Path: Admin > Form Attributes > Service Request Form / Layout Tab

Summary: Select multiple fields for your Service Request Layout at one time.

Discussion:

The Navigation Panel now displays a single option, *Add Field*.

Click the link to open the *Layout Fields* flyout.

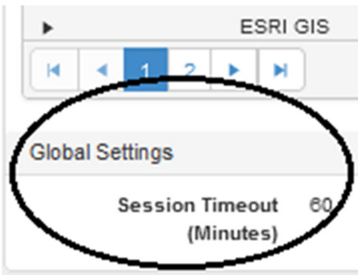
Rather than dragging fields one at a time from the Navigation Panel, fields for the *Service Request Form / Layout* Tab are available in a flyout window.

You can check all the boxes desired before clicking *Save* on the flyout.

All the new fields are inserted at the bottom of the window where you can click-and-drag to rearrange as desired.

March 31, 2022

Adjustable Session Timeout with Alert



Path: Admin > Client Info / Preferences Tab–Global Settings Section

NOTE: WebTMA 7 session timeouts are for **your security**. Unless user are actively working in the application for long periods, a short timeout setting is advisable.

Summary: You have a limited option to set the length of timeout sessions.

Discussion:

Your System Administrator has the option to set the amount of time WebTMA 7 is active before it times out.

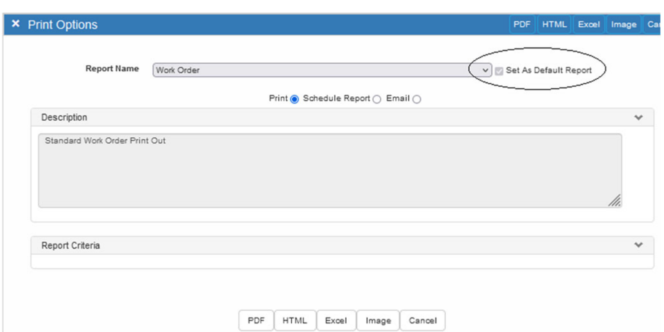
The settings in minutes are:

- minimum 10 minutes
- maximum 120 minutes
- default is 60 minutes

If a user is inactive and within 1-2 minutes of the end of their session, a warning message says, "You are about to be logged out due to inactivity. Press OK to stay logged in."

Select *OK* on the message box to renew the session.

Print Icon Added to Toolbar



Summary: A *Print* icon on the Toolbar avoids opening Reports on the Navigation panel.

Discussion:

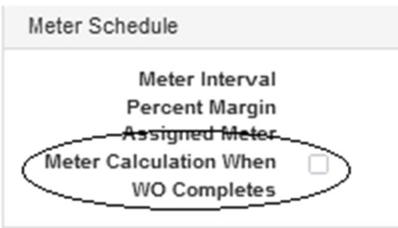
The *Print Options* flyout opens when you click the *Print* icon.

1. Use the drop-down arrow in the *Report Name* field to select a report tied to the current window.
2. (Optional) Mark the *Set As Default Report* check box to automatically display in the report the next time you click the *Print* icon on this window.
3. Select the desired print output button to complete the print.

For windows that do not have reports, the *Print* button is disabled.

The *Report Writer* window includes a *Print* button to print the current report in addition to the *Render Report* link on the Action Menu.

PM Meter-Based Recalculation Option Added



Summary: The *Next PM Meter* value can be recalculated based on the meter Reading added when a PM Work Order is closed.

Discussion:

An elective check box labeled *Meter calculation when wo complete* is now available for Meter Based PMs.

Mark the check box if you want the *Next PM Meter* value to be recalculated based on the reading entered <u>when the PM work order is closed</u>.

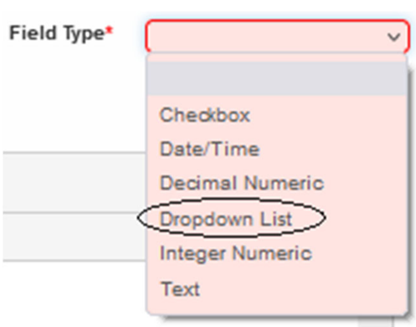
Readings entered from either the *Quick Post Meters* window or when you click *Post Meter Reading* on the Work Order Action Menu are added to the *Meter Interval* to calculate the *Next PM Meter*.

Example:

Meter Interval = 1000 and Last PM Meter = 2000, which would normally show the Next PM Meter = 3000.

With the check box marked and the PM is done_at 500, the Next PM Meter value is recalculated and automatically entered as 3500 after the work order is closed.

UDF Field Type Added



Summary: Added *Dropdown List* as an additional *Field Type*.

Discussion:

The options available in the Field Type list now include a *Dropdown List*.

Service Request Location Hierarchy

Summary: The hierarchy has been changed, and Facility it no longer required.

Discussion:

The *Facility* field can now be omitted from a client-designed Service Request form, and the *Building* field functions without a filter.