WebTMA
Cumulative Release Notes
2023

This document contains Release Notes for v7

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December 2023

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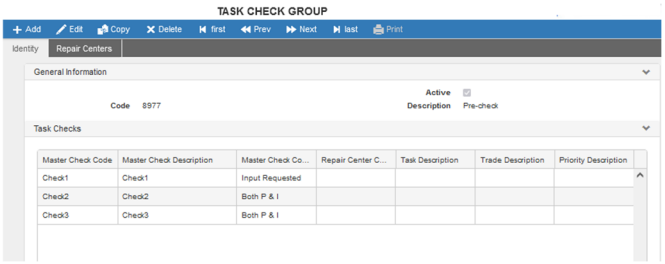
December 12, 2023

New Task Check Group Window



Path: *Organization > Task > Task Check Group*

Summary: Master Checks can now be assembled as a group using the new *Task Check Group* window.

Discussion:

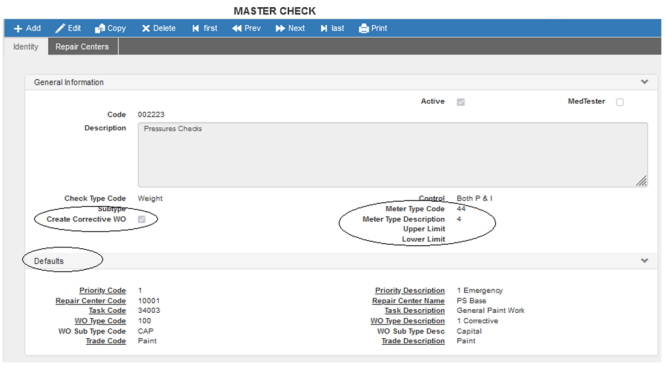
If you use the same series of checks for many Tasks, you can create a *Task Check Group* of Master checks.

Task Check Groups are available for selection on *Task > Records / Task Check List* Tab.

Both Master Checks and Task Check Groups can be selected on the *Task / Task Check List* Tab.

NOTE: All tasks within a Task Check Group have the same *Order #*. On the *Task Check List* Tab, you can change the Order # for a group entry, and all checks in the group will change to the new number.

Master Check Window Enhancements



Path: *Organization > Task > Master Check*

Summary: The *Master Check* window has been enhanced to accommodate changes to the *Check Entry* flyout that is opened from the WO Action Menu. Settings made on the Master Check can trigger Corrective WOs for failed checks. Also, meter readings can be transferred to the item *Meters* Tab if conditions are met. This applies to *Quick Post Check Result* as well.

Discussion:

Create Corrective WO check box: Mark this box if you want a failed check to trigger a Corrective WO. In addition, a mark in this box causes the *Default* section fields to be required.

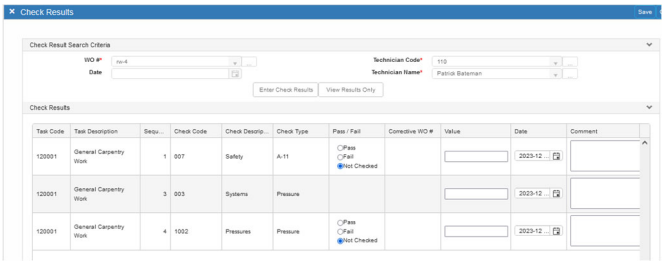
Defaults Section: The entries in this section are used on the *Create Corrective Work Order* flyout when a check is marked Fail on the *Check Result* flyout.

New Control Fields: The *Meter Type Code* is used to identify meters on individual item *Meter* Tabs. When the same *Meter Type Code* is selected for a Master Check, new readings that are entered on the *Check Result* flyout are also recorded on the item *Meter* Tab when the *Check Result* is saved.

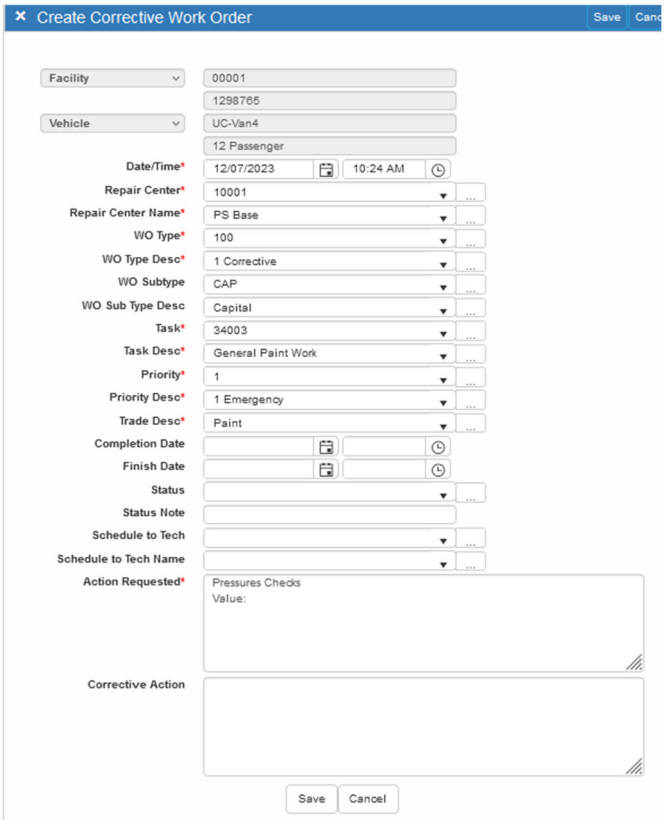
Upper/Lower Limit Fields: When the *Control* is *Both P & I*, you can enter the range values for check readings. If the value falls outside the range, it

triggers a Corrective WO when entered on the WO *Check Result* flyout.

WO Check Results Enhancements



Path: *Transactions > Work Order > Records: Action Menu – Check Results*



Path: *Transactions > Work Order > Records: Action Menu – Check Results* Failed Check *Create Corrective Work Order* flyout

Summary: Entries made from the Work Order Action Menu *Check Results* flyout can trigger corrective WOs for failed checks. In addition, qualifying meter readings entered on the *Check Results* flyout are transferred to the item's *Meters* Tab. This also applies to *Quick Post Check Results*.

Discussion:

Pre-requisites to Use the Feature

- Master Check records completed as described in the previous topic
- Task record that includes the Master Check on the *Task Check List*
- *MWI / Meters* Tab with Meter entry that has Meter Type that matches the Master Check
- Work Order with a Task that includes *Task Check List*

When the checks are to be recorded on the Work Order, select *Check Results* on the Action Menu in *View* mode.

If you mark the *Fail* radio button, the *Create Corrective Work Order* flyout opens with all the required fields completed. These are taken from the Master Task record. You can make changes or additions as needed before you click *Save* on the flyout.

The new work order has a temporary number "*New1".

When you click *Save* on the *Check Entry* flyout, a Work Order number is assigned.

If the WO concerns MWI that have meters with a Meter Type and the Meter Type matches the Master Check, an Input value for a new reading is transferred to the item record *Meters* Tab.

December 5, 2023

Maintenance Only

The December 5, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

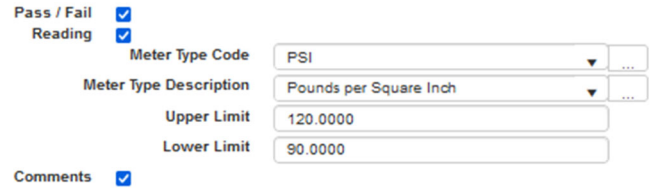
November 21, 2023

Maintenance Only

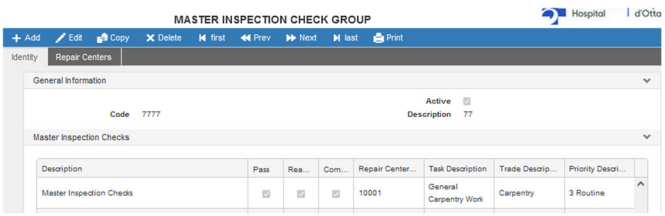
The November 21, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

November 7, 2023

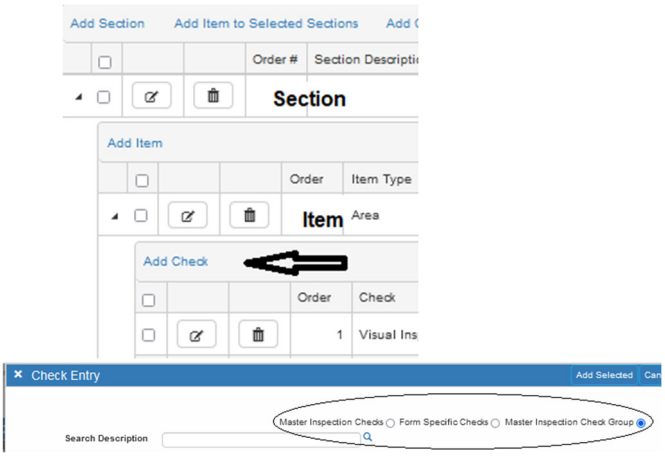
General Inspection Enhancements



Path: *Organization* > *General Inspections* > *Master Inspection Check*



Path: *Organization* > *General Inspections* > *Inspection Check Group*



Summary: General Inspections now includes inspection check values on the MWI record (including meter readings). A new Lookup, *Meter Types*, has been added, as well as a new *Master Inspection Check Group* window that allows checks to be grouped together. The *Meters* Tabs of MWI records show the new Meter Type.

Discussion:

To accommodate these changes, the new *Meter Types* Lookup table was created.

On the *Master Inspection Check* window, meter-related fields are available when the *Reading* check box is marked.

When both *Pass/Fail* and *Reading* are checked, the *Upper Limit* and *Lower Limit* fields are also visible.

The new *Inspection Check Group* window is used to accumulate several Master Checks. The new group can be selected on the Inspection Form.

Readings are logged against the related MWI records on the *Meters* Tab.

Group checks are applied to the *Inspection Form / Layout* Tab when you open the *Check Entry* flyout, i.e., you move to the third tier on the window from Section to Item to Check.

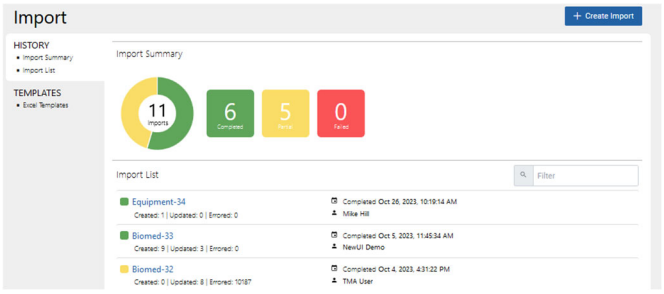
When you select *Add Check*, the *Check Entry* flyout window now includes a *Master Inspection Check Group* radio button. When marked, the available selections are groups you have created from the *Master Inspection Check Group* window.

All checks within a group have the same *Order* number. You can designate the order number using the *Start at position* field at the bottom of the *Check Entry* flyout.

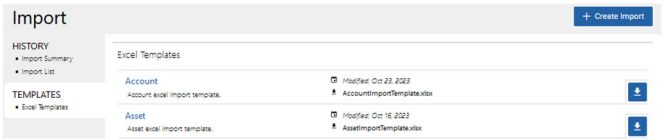
On the Work Order check window, a new *Meter Inspector* name field is visible, but only if the check is linked to a Meter Type.

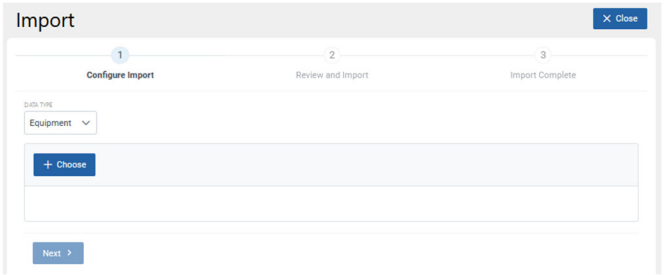
If a Work Order Inspection Sheet reading is outside the established limits, it will automatically fail and create a new WO; however, you must select a Technician first.

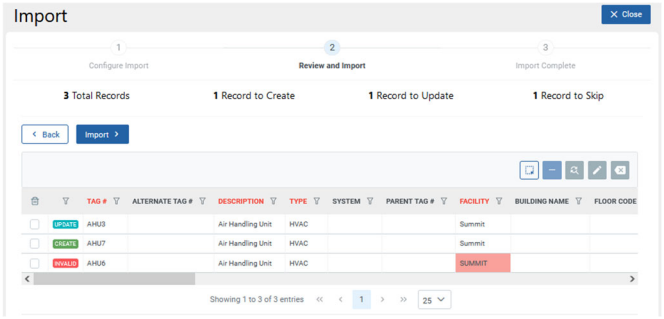
Mass Import Module

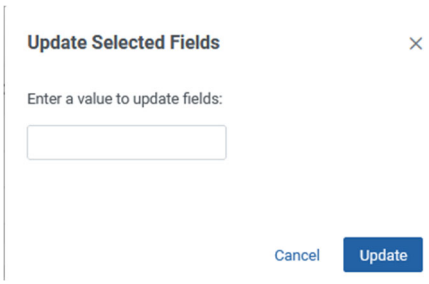


Path: *Admin* > *Mass Import* > *Dashboard*









Summary: The Mass Import module is available for System Administrators to import new data or update existing data.

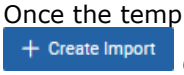
The new menu options are available on the Admin menu. Go to *Admin* > *User Management* > *Records / Window Access* to give your administrative user Full access to the new window.

Discussion:

The Dashboard view shows Import history as a graphic summary and individual files.

The *Templates* tab shows a list of the available Excel Templates you can download and complete before importing. The list of Templates will increase in the future.

Select the desired link or button to download the template.

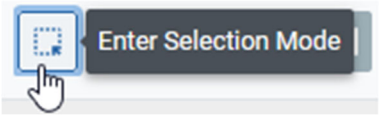
Once the template is completed, you can use the  *Create Import* button on the Dashboard or use the menu *Admin* > *Mass Update* > *Create Import*.

Select the *Data Type* of your import template (Equipment, Asset, etc.), and click the *Choose* button to select your completed Excel spreadsheet.

Click the *Next* > button to see your data before import.

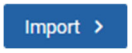
The results display with an indication of the status of each line: *Create*, *Update*, or *Invalid*.

You can use the Selection Mode buttons to make changes to a line. First, select the initial button:



This enables the other buttons:

Select a cell in the table to make the desired change in the *Update Selected Fields* popup pictured at left.

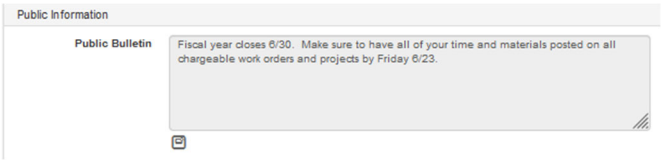
When the data is ready, click the  *Import* > button.

NOTE: If the data needs serious attention, you can select *Close* on this window without

Mass Import Module

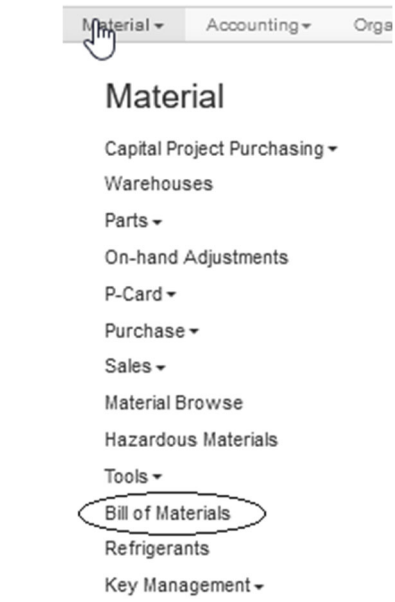
	importing, revise the Excel spreadsheet, and try again.

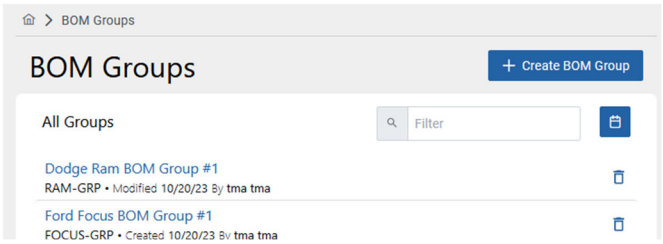
Public Bulletin Field Enlarged

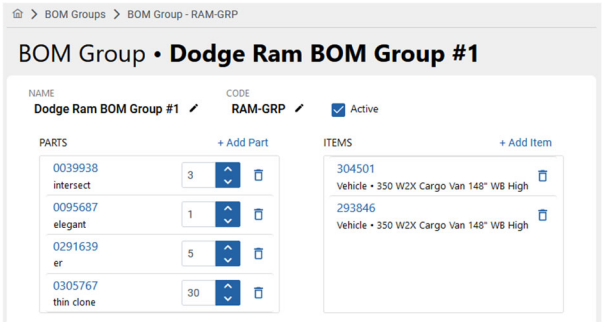
 Path: *Admin > Client Info / Identity*	Summary: The *Public Bulletin* field has been changed from a text field to a text box. Discussion: This change in the *Public Information* section of the *Identity* Tab makes it easier for you to enter and review the bulletins you add.

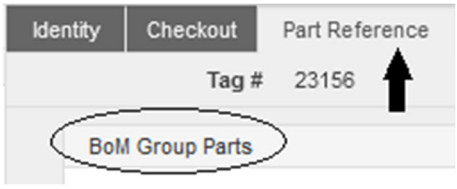
October 24, 2023

Bill of Materials Added









Summary: A Bill of Materials (BoM) can now be created and assigned for maintenance-worthy items.

Discussion:

The BoM accommodates a comprehensive list of parts, items, assemblies, and other materials for your maintenance-worthy item.

Select *Material* > *Bill of Materials* to open the new window where you see the BoM groups as well as create new BOM Groups and select parts and items.

The ***Part Reference*** Tab on the following MWI windows now includes a *BoM Group Parts* section:

- Entity
- Equipment
- IT Equipment

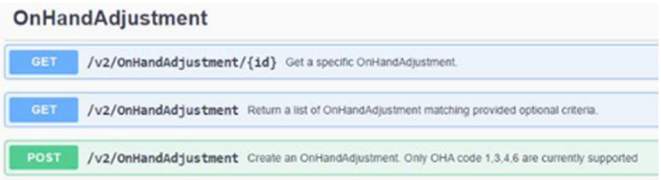
The ***XRef*** Tab on the following MWI windows includes a *BoM Group Parts* section:

- Biomed
- Asset
- Vehicle

The *Parts / XRef* window also includes a *BoM Group Items* section.

October 10, 2023

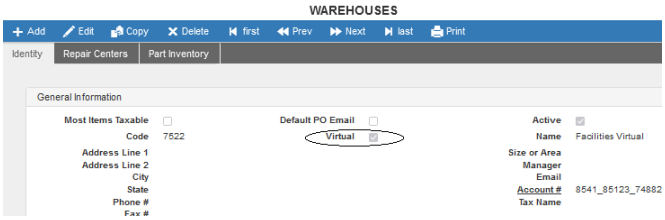
On-Hand Adjustment Platform API Added



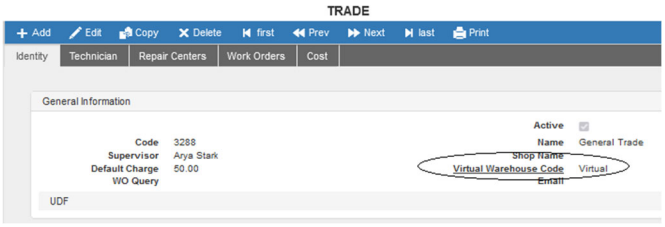
Summary: In addition to the existing Platform APIs, On-Hand Adjustment is also available.

September 19, 2023

Virtual Warehouse Available



Path: *Materials* > *Warehouse*



Path: *Organization* > *Repair Center* > *Trade*

Summary: You can now set up a Virtual Warehouse for accounting and reporting purposes.

Discussion:

When a separate Central Warehouse supports one or more departments, departments like Facilities can establish a Virtual Warehouse.

The Virtual Warehouse is assigned to the Trades that receive the parts from the Central Warehouse.

The Central Warehouse bills the Trade account and is assured of prompt payment.

The Trade bills the account on the work order for the parts they received.

Essentially, the Virtual Warehouse is a pass-through for billing and returns.

Also, the Central Warehouse can issue parts directly to a WO (using *QP Material*, *QP Cost*, or the WO itself) without having to create a separate Warehouse Transfer. The Trade associated with the WO Task provides the Account Number for the Virtual Warehouse.

Since the Trade has a Virtual Warehouse associated with it, it triggers a corresponding Part Transfer which automatically generates in the background. This keeps the billing between Facilities and Central Warehouse distinct as well as the billing between Facilities and their Requestor.

NOTE: If a Work Order is related to a Virtual Warehouse, you cannot issue Parts from the *On-Hand Adjustment* window.

September 5, 2023

UDF Direct Database Views Added

Summary: Views for UDF fields have been added.

Discussion:

Clients moving from WebTMA 5x On-Premise to 7x TMA hosted need to map their data for their reports and translate database tables to the TMA view.

Previously there was no view in the system for UDF data, which prevented clients from completing key reports that relied on UDF fields.

This has now been added to 7x, and clients have human readable views for UDF fields.

August 22, 2023

Maintenance Only

The August 22, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

August 8, 2023

Maintenance Only

The August 8, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

July 25, 2023

Maintenance Only

The July 25, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

July 11, 2023

Maintenance Only

The July 11, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

June 27, 2023

Maintenance Only

The June 27, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

June 13, 2023

Maintenance Only

The June 13, 2023, release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

May 30, 2023

Maintenance Only

The May 30, 2023 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

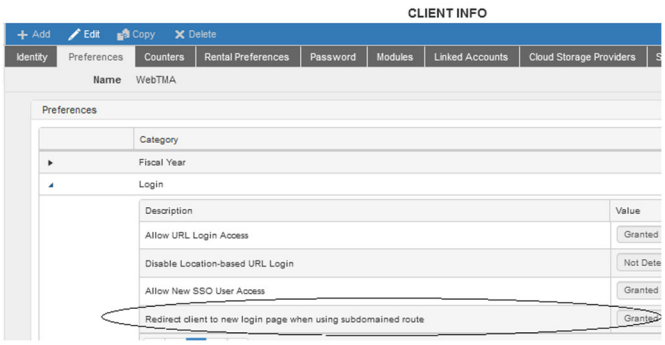
May 16, 2023

Maintenance Only

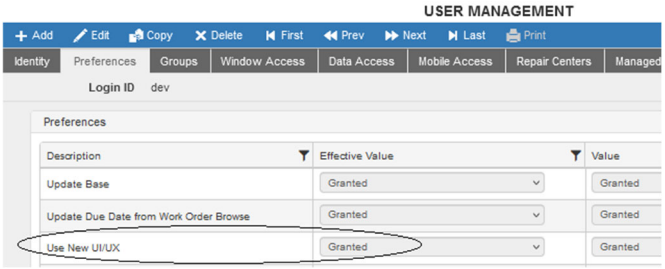
The May 16, 2023 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

May 2, 2023

New User Interface (UI) Settings



Path: *Admin* > *Client Info / Preferences*



Path: *Admin* > *User Management / Preferences*

Summary: The new *Login* and *Home* pages described below become available when settings are completed in *Client Info / Preferences* and *User or Group / Preferences*. Once you make the settings, communicate the changes with users in advance to avoid confusion.

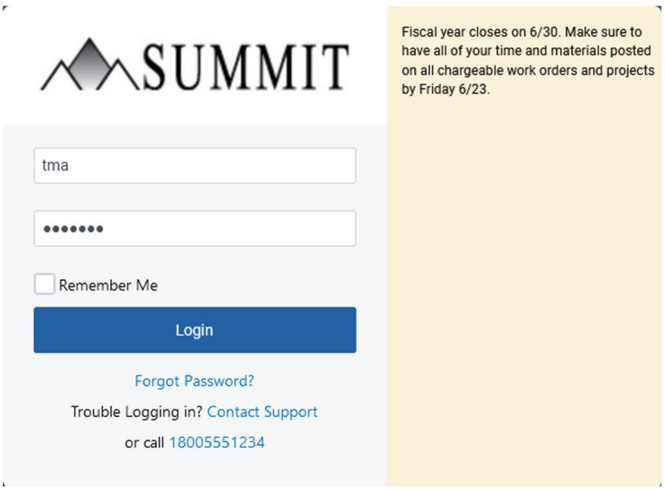
Discussion:

Steps to enable the new pages:

1. Go to Client Info / Preference in the Login section.
2. Grant Redirect client to new login page when using subdomained route.
3. Log out of the application.
4. Relaunch the application to see the new *Login* page.
5. Log in from the new *Login* page.
6. Go to *User Management / Preferences* or *User Management* > *Groups / Preferences*.
7. Grant New UI/UX.

NOTE: The User Preference for UI/UX is not visible unless you log in from the new *Login* page.

New Login Page



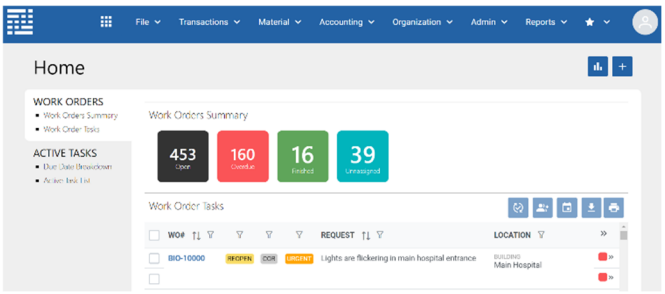
Summary: Once settings are made, Users within an Azure subdomain will be presented with this Login window.

Discussion:

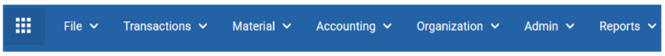
The Login window includes a section for Bulletins that are added by the System Administrator from *Admin* > *Client Info* > *Identity Tab* in the *Public Information* Section.

The bulletin feature can remind users of critical updates and deadlines whenever they log in to WebTMA.

New Home Page User Interface (UI)

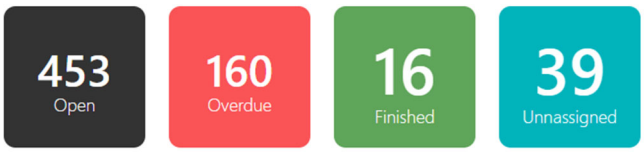


New Home Page – Default View



Top Menu

Filter Field



Work Order View

Summary: A dynamic new Home Page is now available. You have the option of switching between My Dashboard and this new page. Note that your system administrator grants permission to see this new feature. Instructions are at the end of this topic.

Discussion:

The new page is designed for quick visibility and easy access to your high priority items such as Work Orders and Active Tasks.

To see the new Home Page, select the WebTMA 7 icon.

At the upper right of the new Home Page, select the + *Quick Action* button to quickly create any of the following:

- New Work Order
- New Purchase Order
- New Purchase Requisition

The new Home Page has two views:

- Work Orders (default)
- Active Tasks

Any time you want to revert to My Dashboard, select the *My Dashboard* button at the top right.

The menu at the top of the Home Page is the same with the addition of an icon you can select to display a *Filter* field and search the entire application.

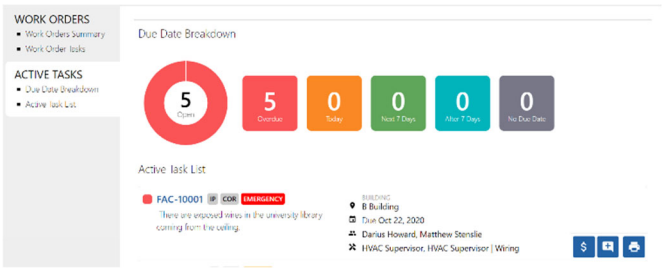
WORK ORDER VIEW

The *Summary* section of the default Work Order view shows a summary of all Work Orders with these statuses:

- Open
- Overdue
- Finished
- Unassigned

Select one of the buttons to display a list of the underlying work orders in the Work Order Tasks section.

Use the Filter buttons at the top of the columns to see the desired Work Orders. You may also take action by marking the check box on a Work Order(s)



Active Tasks View

and choosing one of the following buttons from the top right of the list:

Update Status: Update the Status of the WO

Assign Technician(s): Assign a technician to the WO

Update Due Date: Update the Due Date on the WO

Export to CSV: Export to a csv file

Print: Print the WO

ACTIVE TASKS VIEW

The Active Tasks view shows a *Due Date Breakdown* and an *Active Task List*.

In the *Due Date Breakdown* section, you see all your active tasks categorized by the following statuses:

- Overdue
- Today
- Next 7 Days
- After 7 Days
- No Due Date

Select any of the buttons to display only those items in the *Active Task List* below.

Select the buttons at the right of a line item to:

Post Cost: Opens *Work Order Cost Entry*

Add Task Comment: Add comments to Tasks

Print: Print the Task

April 18, 2023

Maintenance Only

The April 18, 2023 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

April 4, 2023

Maintenance Only

The April 4, 2023 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

March 21, 2023

Bar Code Font Available

Base-10302

Printed Work Order with Barcode

Summary: Bar codes can be printed on Work Orders or from Report Writer with the installation of the w39l.ttf file available from this link to ZenDesk: https://knowledgebase.tmasystems.net/hc/en-us/articles/14089080706957-WebTMA-7-03-21-2023-Release.

Discussion:

Download and open the font file, then select the *Install* button at the upper left.

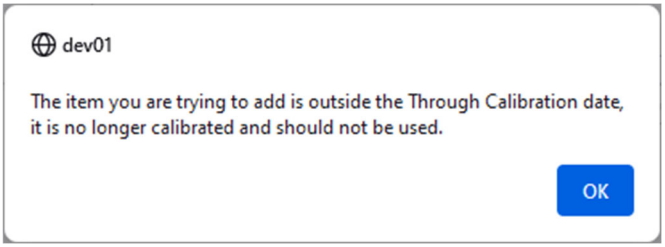
Once installed, reload your browser and be sure *Client Info / Preference* for Work Order has *Show Barcode* granted. Future print copies of Work Orders will include a bar code beneath the number.

To print special labels that attach to your maintenance-worthy items, use the Report Writer and apply a non-label style to the field for the bar code.

March 7, 2023

MWI Calibration Dates

Path: *Transactions > Work Order > Records / Costs Tab-Post Test Items Flyout*



Summary: When Maintenance Worthy Items (MWI) require calibration, the *Last Calibration* and *Through Calibration* dates can be confirmed on the *Work Order / Cost* Tab using the *Post Test Item* button. The dates tell a Technician whether the MWI is eligible to be used. If the item is no longer within calibration limits, a warning pops up.

Discussion:

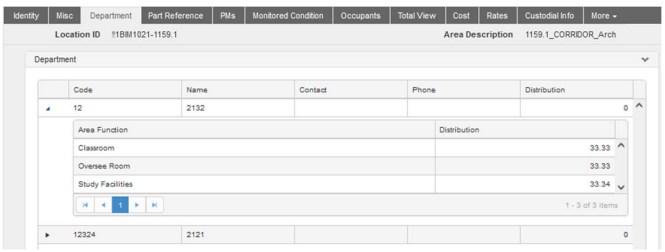
The MWI records that now include calibration date fields are: Asset, Biomed, Equipment, IT Equipment, Linear Asset, Tools, or Vehicles.

To identify the MWI as requiring calibration, first create Task records (*Organization > Task*) and select *Calibration* in the *Autotrack Description* field.

Assign the Task to the MWI on the *PM* Tab to associate the item for calibration.

When a Work Order that uses the calibrated MWI has a *Closed Date* or *Finish Date*, WebTMA uses these dates combined with PM frequency to update the related Task and MWI calibration date fields.

Areas / Department Tab Allows Nested Usage



Path: *Organization > Areas > Records / Department Tab*

Summary: Area records that show multiple ownership for different Departments now allow a usage split within each Department.

Discussion:

One Area (room) may have a 50/50 split between the School of Biology and the School of Chemistry.

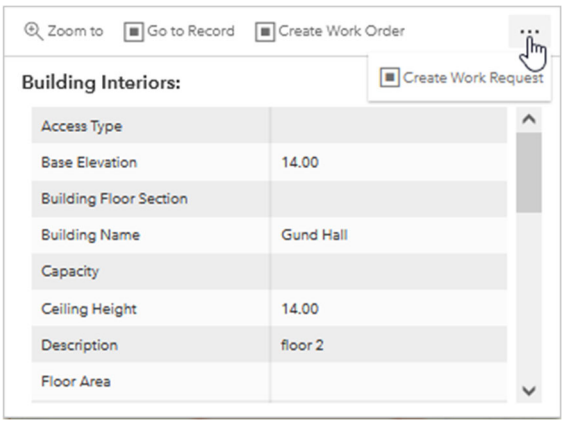
Within those splits, the School of Biology may further divide the Area function with another 50/50 split between Classroom and Laboratory.

The School of Chemistry may do this differently.

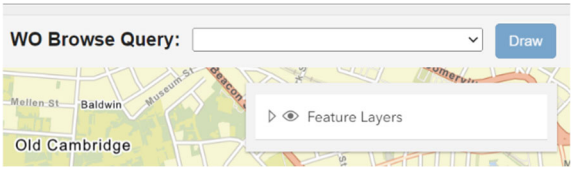
With this nested approach you can determine the percentage and type of usage for each Department.

February 21, 2023

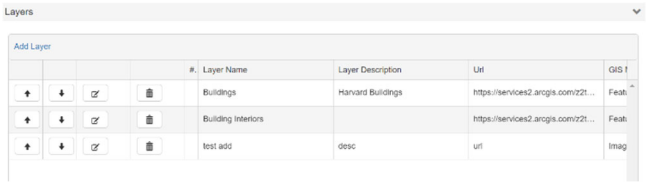
GIS Module Enhancements



Path: *File > GIS Map View*



Path: *File > GIS Map View*



Path: *Admin > GIS > GIS Map*

Summary: New features have been added to Map View: You can now create a Work Order or a Request directly from a map item; you can use a WO Browse query to simulate a layer on the Map View page; and administrators can rearrange map Feature Layers as needed.

Discussion:

On the *GIS Map View* page, users can select the *Create Work Order* or *Create Work Request* button for any map item to easily create records for that item. Selecting the buttons opens the window in *Add* mode with the fields pre-populated. **NOTE:** The Feature Layer popup must include **only one record** to use this button successfully.

On the *GIS Map View* page, users can choose a *WO Browse Query* and select the *Draw* button to see the results directly on the map.

On the *GIS Map* page, administrators can use the up and down arrows in the *Layers* Section to determine how the layers appear on the *Feature Layers* in Map View. This is especially helpful when you add more layers to the map and want to keep the list of layers in a logical order.

February 7, 2023

New Auto Attendant Feature

Path: *Admin* > *Auto-Schedule Rules*	Summary: Administrators now have the option to auto-convert Requests and auto-assign a Trade to all Work Orders. Discussion: This allows organizations to make use of the mobile WO Queue for auto-converted requests. If neither the Auto Schedule nor the Task specify a Technician, but do specify a Trade, the WO Query for that Trade is respected.

New UDF Feature

Path: *Admin* > *Forms* > *System Form Attributes*	Summary: Administrators can now create corresponding UDF fields for two windows: *Request Log* and *Work Order*. Discussion: If you create UDFs in the *System Form Attributes* window for the *Request Log* and *Work Order* window and these share the same label and the same data type (i.e., Name and Type), the contents of the UDF field on your Request is carried to the corresponding UDF field on the Work Order when accepted. These UDF fields can also be included on the *Service Request Form / Layout* Tab when System Administrators create new Service Request Forms.

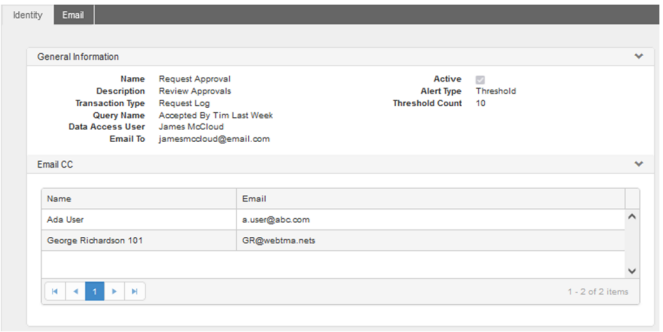
January 24, 2023

Maintenance Only

The January 24th, 2023 release of WebTMA 7 is for maintenance only. There are no enhancements or new features.

January 10, 2023

Set Thresholds with New Alert Rule Window



Path: *Admin > Alert Rule / Identity Tab*

Summary: Use this new window to create rules that alert specified people when certain conditions are met or exceeded.

Discussion:

Access to the window should be limited to WebTMA System Administrators.

Queries established on each of the following windows can be used to set up the alerts:

- Project
- Purchase Order
- Purchase Requisition
- Request
- Work Order

Examples: A manager wants to be informed when the number of outstanding Work Orders exceeds a specified number, or a single Request is submitted for a particular Repair Center and Department.