WebTMA
Cumulative Release Notes
2024

This document contains Release Notes for v7

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December 2024

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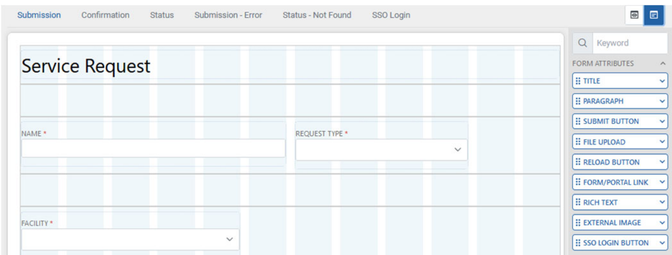
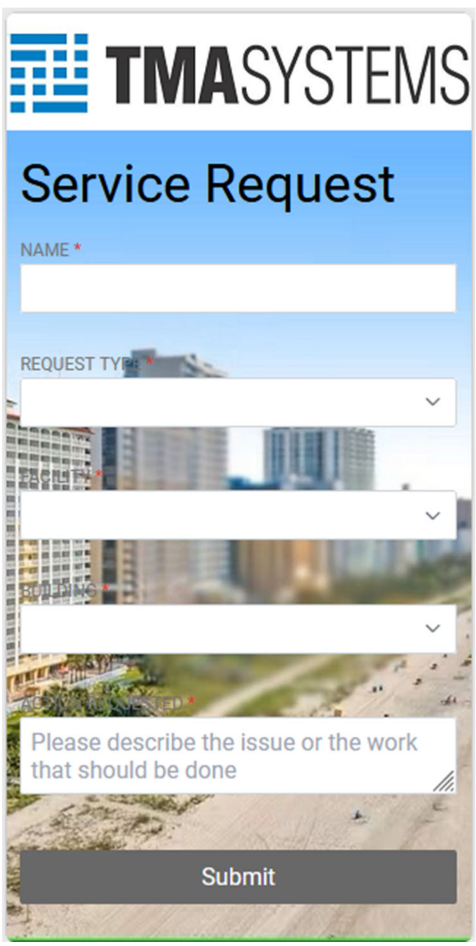
Contents

December 10, 2024

New Service Request Portal Module (SRP)



Path: *Admin > Forms > Service Request Portal*



Mobile View

Summary: A new, easy-to-use module has been added for creating your Service Request windows. This reimagination of the service request functionality will allow you to build better looking, easier to use service request pages for your infrequent users who need to place a service request.

Features include drag-and-drop design, quick previews of all your views (computer, tablet, and mobile), easy setup of Anonymous Users as well as authenticated users, and many more.

The pages will be fully WCAG 2.0 compliant and there are preview modes that allow you to see how the page looks on different sized devices.

This is the first edition of continuing development. More exciting changes will be coming soon.

Details:

If you have different types of users, you have the option to create numerous Service Request pages with unique URLs. You can also add links for several URLs to your own Service Request "landing page".

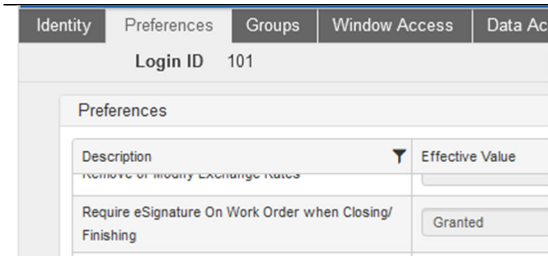
Your requestors will receive confirmation of their request and have easy access to the Status.

Your designs can include default content for certain fields, and you can hide these fields to save space if needed. You can also "link" fields to restrict selections.

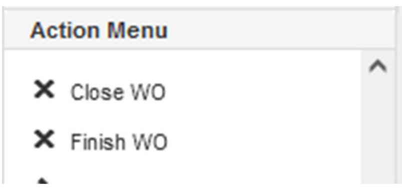
NOTE: The current service request functionality will continue to work side by side with this new feature. We believe once clients see the benefits of the new module, you will make the switch as soon as it is possible within your organization.

This is our December Voice of the Customer enhancement. We would like to thank California State Polytechnic University for submitting this enhancement suggestion. We saw an opportunity to redevelop the page completely to be more user-friendly in all areas. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

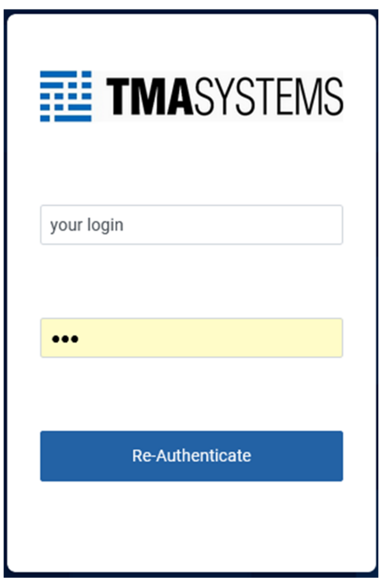
User Verification (eSignature) for Finishing/Closing WOs



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



Path: *Transactions > Work Orders > Records*



Summary: You now have the option to force User re-authentication when a work order is Finished or Closed.

This enhancement ensures that the logged-in user is the person who modified the Work Order record when finishing or closing and is used to keep your records in CFR compliance.

Details:

To invoke this change, grant the *Require eSignature On Work Order when Closing/Finishing* Preference (*Admin > User Management > Records / Preferences*) for users who are allowed to close or finish records.

On the work order, the *Finish Date* and *Close Date* fields are disabled for users with this Preference. An information icon instructs users to select the *Close WO* or *Finish WO* commands in the Action Menu.

The process is as follows:

1. Complete and *Save* the work order.
2. Click *Close WO* or *Finish WO* on the Action Menu in *View* mode to open the related flyout.
3. Complete the needed fields.
4. Click *Save* on the flyout. The system refreshes and presents the Re-Authenticate login window.
5. Enter login credentials
6. Click the *Re-Authenticate* button.

Quick Post and batch close from *WO Browse* also require re-authentication. Currently it is not available on Mobile TMA.

This is also a Voice of the Customer enhancement. We would like to thank Röchling Medical for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

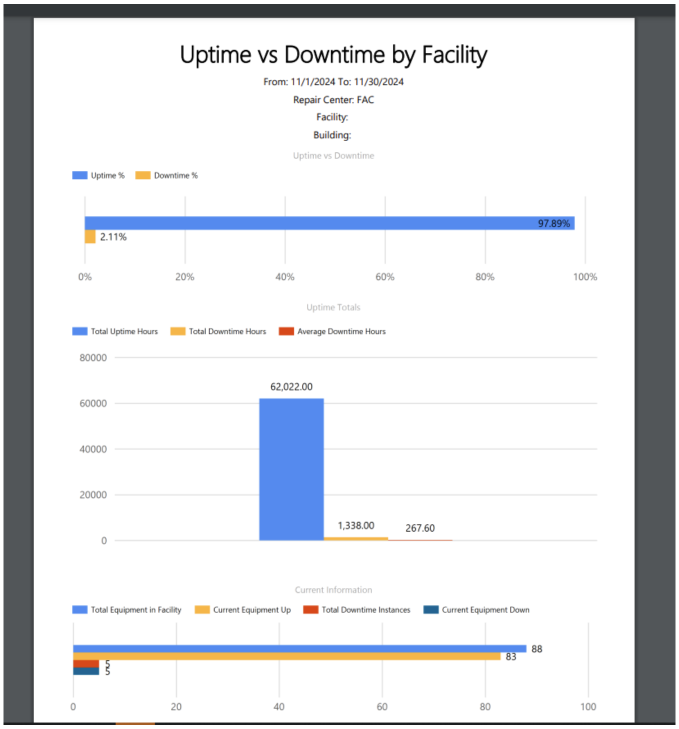
Uptime vs Downtime by Facility Added to Report Manager

Summary: A new report has been added to the Management category of the Report Manager to analyze Equipment Uptime and Downtime by Facility.

The title of the report is *Uptime vs Downtime by Facility*.

Details:

The report allows the selection of a Repair Center, a Facility, and/or Building and a Work Order date



Path: *Reports > Report Manager*

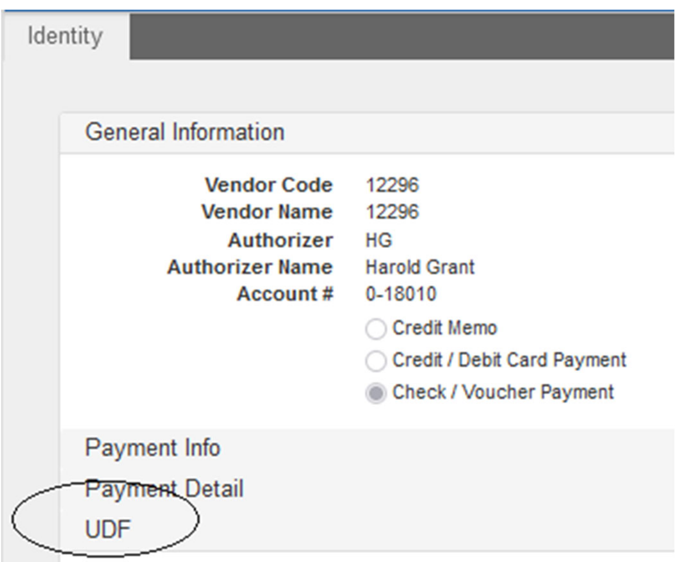
range. It displays the *Total Uptime %* vs *Total Downtime %* for the selected date range.

In addition to the percentages, it shows *Total Uptime Hours* for all Equipment in the selected RC, Facility, Building, the *Total Downtime Hours*, and the *Average Downtime Hours*.

Finally, it provides context by showing the *Total Equipment in the Facility*, the *Current Equipment Up*, the *Current Equipment Down*, and the *Total Instances of Downtime* in the selected date range.

The report is identified as *Special*, which means it cannot be copied and recreated.

AP Payment Window Now Includes UDF Section



Path: *Accounting > Accounts Payable Invoice > AP Payment*

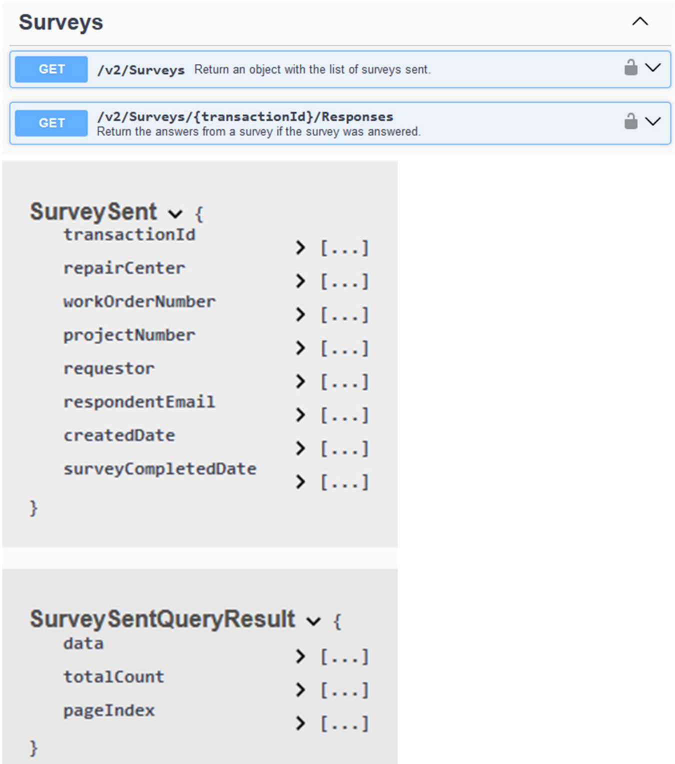
Summary: A *UDF* section has been added to the *AP Payment* window.

If you need to track information that is not on the window, this feature allows you to add as many fields as needed.

Details:

You can set up your UDF fields from *Admin > Form Attributes > System Form Attributes*. Open *APPayment* and scroll to the bottom of the window where you can create, name, and establish the layout for UDF fields on this window.

Survey Endpoints Enhanced in Swagger



Swagger Schemas

Summary: In an ongoing response to our customers' requests, we continue to enhance the endpoints.

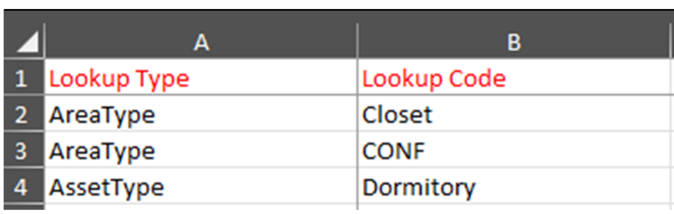
In this release, we have added platform endpoints to retrieve surveys sent as well as receive survey responses.

Details:

These new endpoints have been added to help retrieve data for the surveys that are sent and to see survey responses.

Having these endpoints available allows you to share survey results on public performance metrics or outside Business Intelligence (BI) tools.

Search Functionality Added to Repair Center Assignment



	A	B
1	Lookup Type	Lookup Code
2	AreaType	Closet
3	AreaType	CONF
4	AssetType	Dormitory

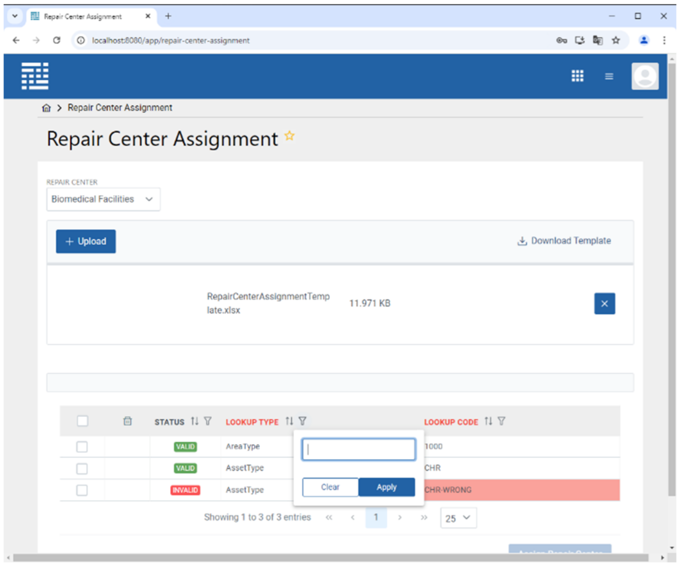
Example of Spreadsheet Entry

Summary: The *Repair Center Assignment* window allows Administrators to upload a populated template with the Lookup Types and Lookup Codes that are accessible from within a selected Repair Center.

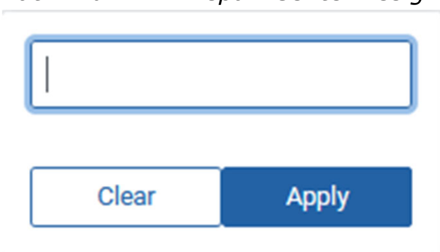
The results grid now includes Search, Filter, and Sort options like other grids in WebTMA.

Details:

The window is easy to use. Simply *Download Template* from the window. Note the specific format to use for the Lookup Type in the spreadsheet. Be



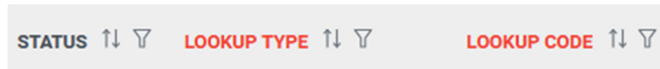
Path: *Admin > Repair Center Assignment*



sure your Lookup Type name is followed by the term 'Type' with no space.

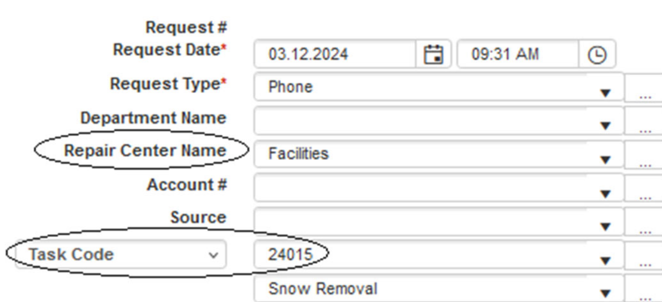
Once you have completed the Template, select a Repair Center and click the + *Upload* button on the window to select your completed Template.

The resulting grid includes options to Search, Sort, and Filter.



Click the Filter icon to see a search popup.

Request Log Now Filters Tasks by Repair Center



Path: *Transaction > Request > Request Log*

Summary: Those who use the *Request Log* window and are knowledgeable about Task Codes will find this new feature useful.

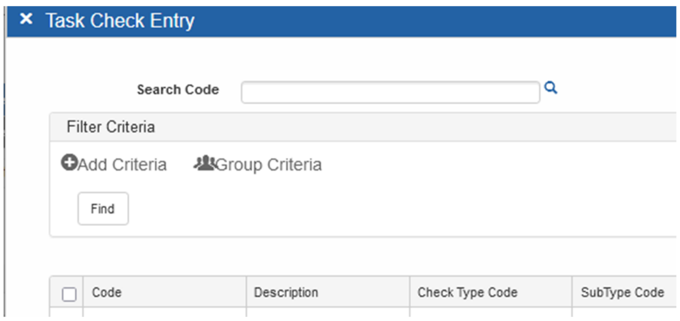
The selections in the Task Code drop-down are limited to the named Repair Center if one is entered.

Details:

If no Repair Center is entered on the *Request Log*, Users see Task Codes for all Repair Centers to which they have access.

November 26, 2024

Task Check Group Enhancement



Path: *Organization > Task > Task Check Group*

Summary: The *Task Check Group* window is a convenient way to add several Master Checks to one record. You can now search and filter for Master Checks from the *Task Check Group* window.

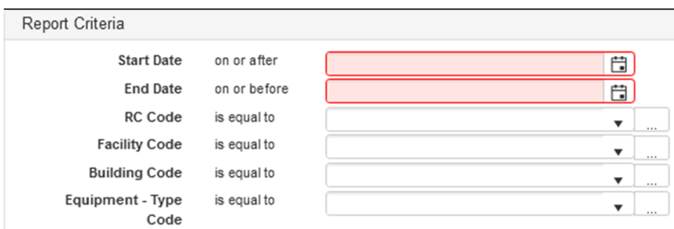
If you have numerous Master Checks (*Organization > Task > Master Check*), this enhancement gives you a way to quickly locate the records you need.

Details:

A *Master Check Code* column has been added to the results grid, and the check *Code*, *Check Type Code*, and *SubType Code* criteria have been added to the drop-down list on the *Task Check Entry* flyout as well as the grid on the flyout.

In addition, a *Find* button was added in the *Filter Criteria* section to make it more accessible and intuitive to the user.

MTTR and MTBF Report Added to Report Manager



Path: *Reports > Report Manager / PM*

Summary: A new report has been added to the PM category of the Report Manager to calculate the average time it takes to repair a failed component and the reliability of a component.

The report is titled *Equipment Availability with MTTR and MTBF*.

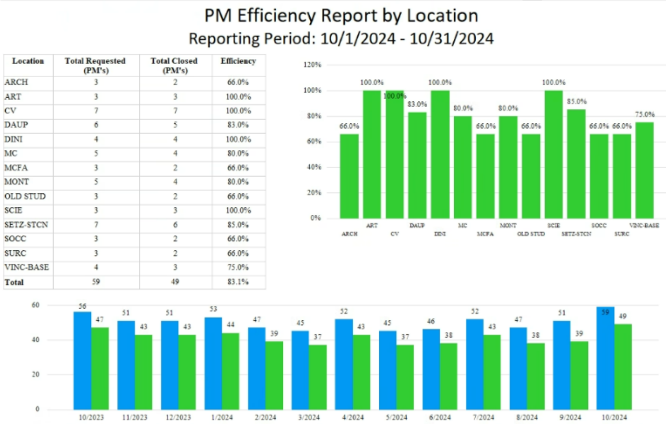
Details:

Based on posted downtime, the report shows in hours the Available Time, Uptime, Downtime, MTBF, and MTTR for a range of equipment in a Facility, Building, and Area.

In addition to *Start Date* and *End Date*, you have the option to limit the results based on Repair Center, Facility, Building, and Equipment Type. The report is identified as *Special*, which means it cannot be copied and recreated.

- MTTR – Mean Time To Repair
- MTBF – Mean Time Before Failure

PM Efficiency by Location Report Added to Report Manager



PM Efficiency Report by Location

Reporting Period: 10/1/2024 - 10/31/2024

Location	Total Requested (PM's)	Total Closed (PM's)	Efficiency
ARCH	3	2	66.0%
ART	3	3	100.0%
CV	7	7	100.0%
DAUP	6	5	83.0%
DINI	4	4	100.0%
MC	5	4	80.0%
MCFA	3	2	66.0%
MONT	5	4	80.0%
OLD STUD	3	2	66.0%
SCIE	3	3	100.0%
SETZ-STCN	7	6	85.0%
SOCC	3	2	66.0%
SURC	3	2	66.0%
VINC-BASE	4	3	75.0%
Total	59	49	83.1%

Path: *Reports > Report Manager / PM*

Summary: A new report has been added to the PM category of the Report Manager to calculate and evaluate PM Efficiency by Location in WebTMA.

The report is titled *PM Efficiency Report by Location*.

Details:

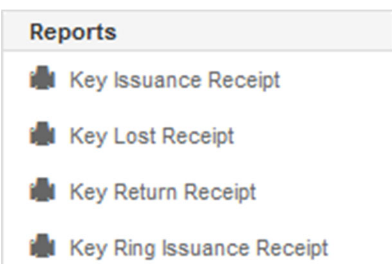
The report shows the total amount of PM's generated and the total completed within a given time range. It also displays your efficiency percentage by Building, and the totals by Building.

Also, it displays your average efficiency percentage for all Buildings within the selected time range.

In addition to *Request Date* and *Completion Date*, you have the option to limit the results based on Repair Center and Facility.

The report is identified as *Special*, which means it cannot be copied and recreated.

Key Adjustment Reports Added



Path: *Material > Key Management > Key Adjustments*

Summary: The *Key Adjustments* window is used for numerous transactions that involve Keys.

Several reports have been added to the *Reports* section of the Navigation Panel to help speed up your use of the Key Module.

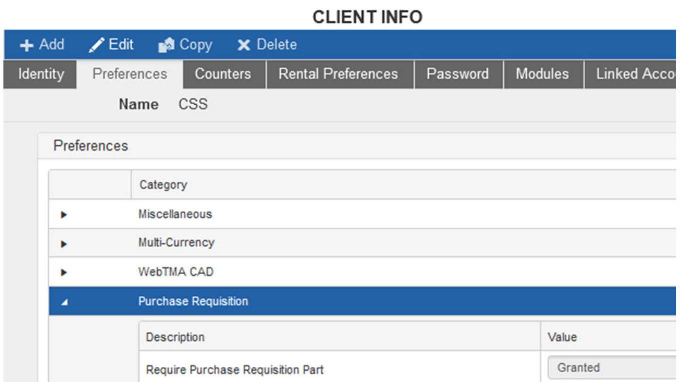
Details:

The following reports are now available:

- Key Issuance Receipt
- Key Lost Receipt
- Key Return Receipt
- Key Ring Issuance Receipt

November 12, 2024

Purchase Requisition Enhancement in Client Info



Path: *Admin > Client Info / Preferences*

Summary: You now have the option to save a Purchase Requisition record without adding line items. While the standard process includes item lines, some situations require that a record be completed later.

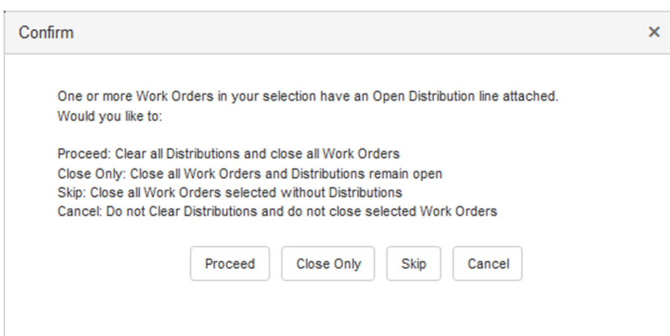
Details:

A new *Purchase Requisition* Category has been added in *Admin > Client Info / Preferences* where the option *Require Purchase Requisition Part* is **granted** by default.

If you want to save PR records without item lines, you can **Deny** this preference.

This is our November Voice of the Customer enhancement. We would like to thank the University of Alabama Birmingham for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

WO Browse Window Now Alerts for Open Distribution



Path: *Transactions > Work Order > WO Browse*

Summary: If Quote, PR, or PO items that are marked for distribution to a Work Order have not been received and you attempt to close the Work Order, you are alerted that there are Open Distributions.

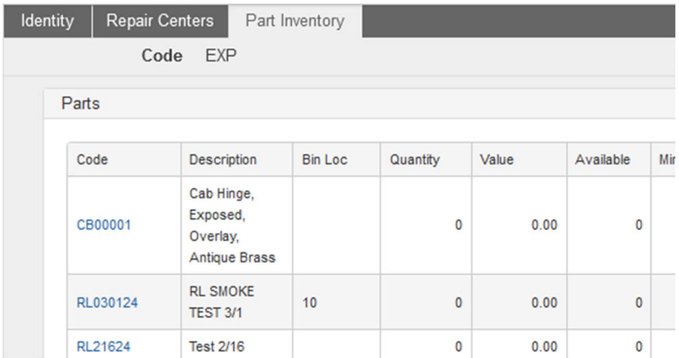
While an alert has always shown in the *Work Order* window, this functionality has been added to the *WO Browse* window as well.

Details:

The *WO Browse* window offers numerous options to manage selected Work Orders. One of those options is *Close Selected*. If any of the selected lines have Open Distributions, you receive the alert shown at left, which lists your options to *Proceed*, *Close Only*, *Skip*, or *Cancel*.

Warehouse Copy Will Clone Records with Inventory

Summary: You have the option to make a copy of an existing Warehouse and clone all settings including



Path: *Material > Warehouses*

the *Part Inventory* Tab of the original – **except** the *Quantity*, *Value*, and *Available* columns on the Tab.

Details:

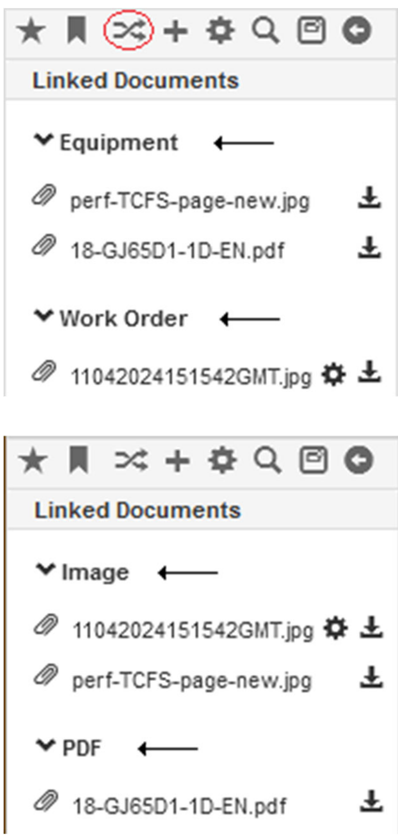
The process is easy. Open an existing Warehouse record and click *Copy* on the toolbar.

The resulting record is in *Add* mode and needs a *Code* and *Name*.

The new Warehouse is now visible on the *Material > Parts > Records / Location* Tab.

You can transfer quantities to the new Warehouse using *Material > Parts > Transfer Parts* if needed.

Linked Documents Toggle View Feature



Navigation Panel – Linked Documents

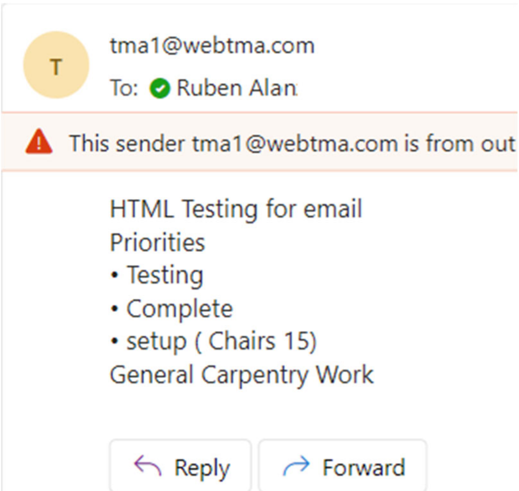
Summary: A new icon has been added to the Navigation Panel. The *Toggle Linked Documents View* icon is used to view by file type (image, .pdf, etc.) or by the record to which the files are linked.

Details:

The default view categorizes files by the record they are attached to. In the first screenshot at left, two files are attached to the Equipment record and one is attached to the Work Order record.

Click the icon to view by file type. The files in the second screenshot now show two image files and one .PDF file.

Email Format Enhanced



Example email in HTML format

Summary: Email messages that were created as text-only are now available in HTML format.

Details:

Improvements were made to the HTML layout, and paragraphs are automatically formatted correctly.

October 29, 2024

Open Distribution on Batch Closed WOs Now Has Alert

Path: *Transactions > Work Order > WO Browse*

Summary: When you batch close work orders from the *WO Browse* window, the system now gives you an alert for open distributions in the same way it does when closing from the *Work Order* window.

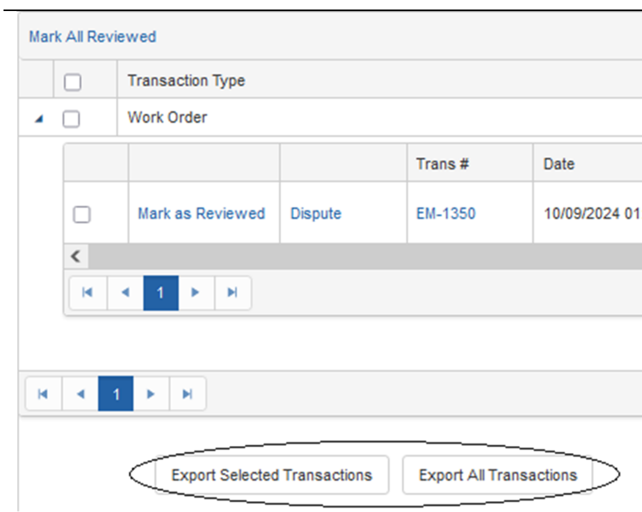
Details:

When you close one or more work orders from WO Browse that have open distributions, you receive an alert and can select from the following:

- **Proceed**: Clear all Distributions and close all Work Orders
- **Close Only**: Close all Work Orders and Distributions remain open
- **Skip**: Close all Work Orders selected without Distributions
- **Cancel**: Do not Clear Distributions and do not close selected Work Orders

This is our October Voice of the Customer enhancement. We would like to thank Colgate University and University of Massachusetts - Amherst for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Pending Charges Review/Dispute Export Lines



Path: *Accounting > Post Charges > Pending Charges Review/Dispute*

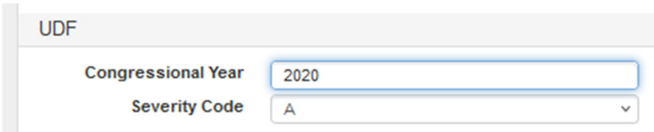
Summary: This new development for the *Pending Charges Review/Dispute* window gives you the option to export some or all the transactions.

Details:

You can check lines on the grid to use the *Export Selected Transactions* button or you have the option to *Export All Transactions*.

Since there are different transaction types in the grid when exported to Excel, each type has its own worksheet. The same is true for the accounts.

Edit UDF for Accepted Inspection Findings



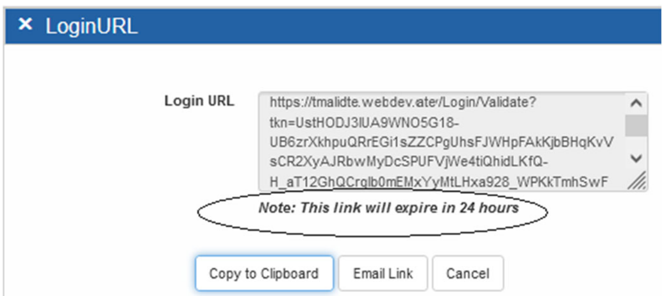
Path: *Transactions > Request > Inspection Findings*

Summary: By default, an Accepted Inspection Finding record cannot be edited. UDF fields are now an exception.

Details:

With this change, you can double-check that the inspection has been completed by entering data in your UDF fields.

Login URL Reminder Added



Path: *Admin > User Management > Records*

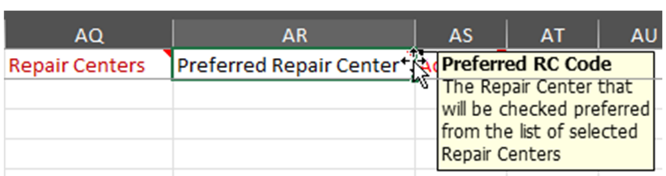
Summary: The feature that allows selected Users, Requestors, and Technicians to log in without using an ID and Password was revised earlier this year.

A reminder has been added to the *Login URL* flyout to remind administrators that the link expires.

Details:

The change resolved a security vulnerability, and the links expire in 24 hours.

Mass Import Biomed Equipment Template Has Preferred RC



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

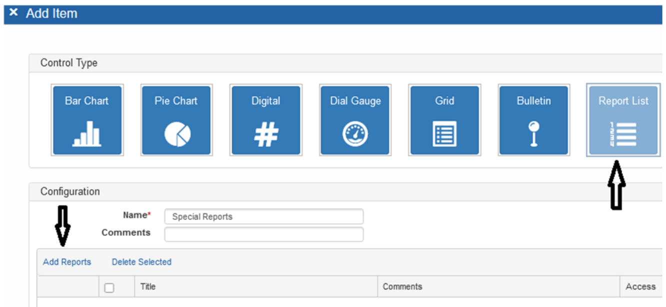
Summary: When using the Mass Import module for Biomed Equipment, you can now include a Preferred Repair Center if needed.

Details:

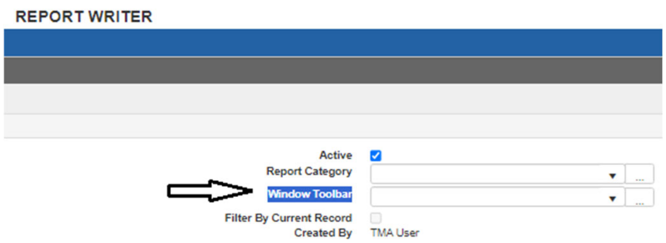
A new *Preferred Repair Center* column has been added next to the *Repair Centers* column. If a Repair Center is added to the new column, the *Biomed / Repair Centers* Tab will have a check mark in the *Preferred* column for imported records.

Reminder: Only one Repair Center can be entered in the Preferred Repair Center column.

Report Manager Reports Linked to Dashboard



Path: *Dashboard* (*Add New Control* in *Edit* mode)



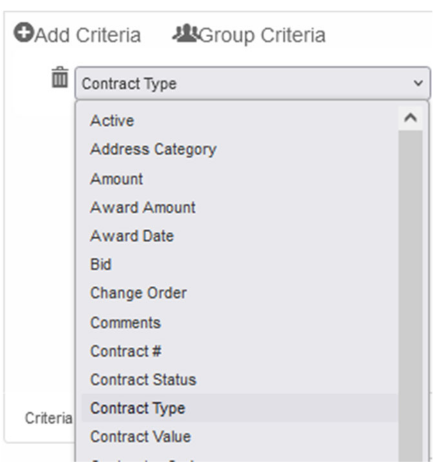
Summary: Most reports in Report Manager are now eligible for selection on the Dashboard.

Details:

This applies to reports that do not have a record set on the *Window Toolbar*.

Only reports that do not have the window toolbar selected on the report are available for selection in the dashboard.

Contract Find Enhanced



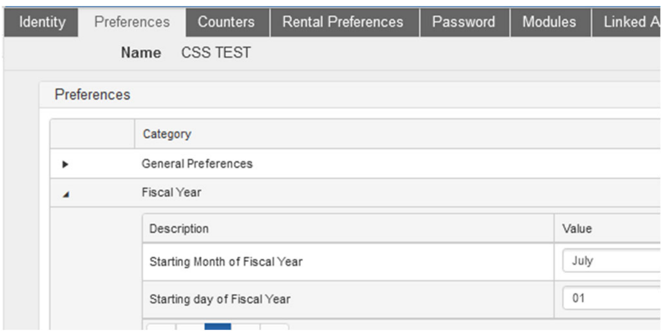
Path: *Organization > Contract > Records*

Summary: The Criteria drop-down list now includes *Contract Type* as a selection when you create your Contracts search.

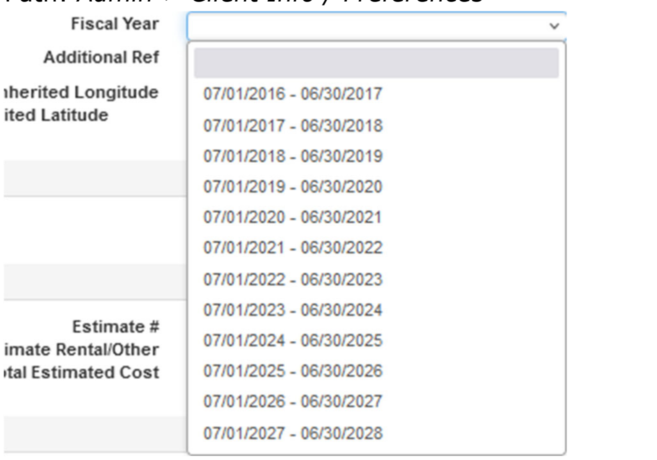
Details:

With this addition, you can add *Contract Type* as a display column in your Contract queries.

Fiscal Year Change for Client Info and Work Order Window



Path: *Admin > Client Info / Preferences*



Path: *Transactions > Work Order > Records / Identity Tab*

Summary: The Fiscal Year settings in *Client Info / Preferences* have been changed. You can select a *Starting Month* and a *Starting Day* for your fiscal year settings.

A *Fiscal Year* field has also been added to the *Work Order* window in the *More Information* section. The date range has been included to make it easier for managers/technicians to select the correct FY option. This can be used in reports to show the Fiscal Year (budget year) the work was completed.

Details:

The format in the *Fiscal Year* field drop-down window follows this hierarchy:

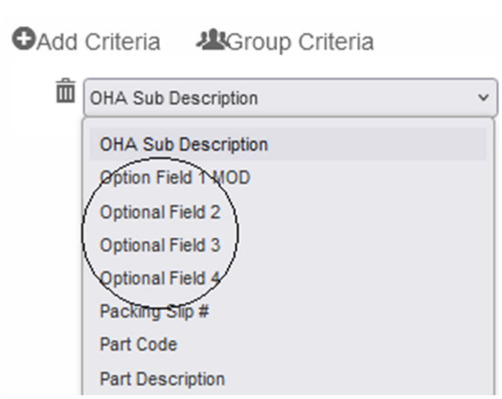
- User / Preferences
- Client Info / Preferences
- Default MM/dd/yyyy (if neither User nor Client Info settings are present)

The drop-down options span eight fiscal years prior, the current fiscal year, and three fiscal years in the future.

Your System Administrator sets the Fiscal Year *Starting Month* and *Starting Day* in *Admin > Client Info / Preferences*.

The System Administrator can also make the Work Order *Fiscal Year* field required from *Admin > Form Attributes > System Form Attributes*.

Criteria Added to On-Hand Adjustment Search



Path: *Materials > On-Hand Adjustments*

Summary: The *Optional Fields* that were added to the *On-Hand Adjustment* window flyout have been added as criteria field selections on the drop-down selection list when you use Advanced Find (*Show the Search Panel*).

These fields can also be added as columns on the *Display Column* tab of the *Find* flyout.

Details:

You can now choose the four new *Optional Fields* when making your criteria and column selections.

Biomed Make/Model Linked to Mass Import Tool

Summary: The Biomed Mass Import Template now fully supports Make/Model and Check-In Task functionality. The Make/Model features make it easy to default information for new Biomed equipment based on standards set at the Make/Model level (i.e., PM Schedule, manufacturer information, etc.). This is particularly helpful when you have multiple Biomed assets of the same make and model.

For example, if you purchase a quantity of identical defibrillators, you can establish the PM Schedule in Make/Model and assign it when you import the new item information. Subsequent purchases of that same make/model can be imported and automatically receive the same PM Schedule. If changes are needed to the PM Schedule, you can update the Make/Model record, and the change is reflected on all records associated with that Make/Model.

The process can also generate a *Check-in Task* from the Make/Model if it exists. If it is not part of a Make/Model record, the system looks to the Repair Center for the Check-in Task. If none is found, no Check-in Task is generated.

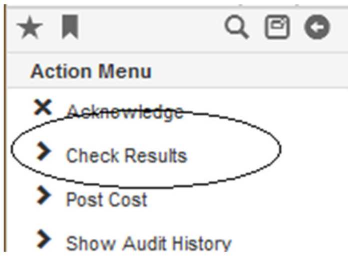
Details:

If you want PM schedules to be created for the Make/Model Biomed items being added, the following columns need to be present and valid. If any are not valid or not populated, the item is added but no PM Schedules are associated.

- The application will look up the Biomed Make/Model based on Make Name, Device Type, Manufacturer and Model #.
- Base PM Date
- Trade (This is an optional value in the import. If Make/Model PM schedule does not have a Trade, the Trade from the template is used.)
- Repair Center

Check Results Available for Technician Login

Summary: When Technicians log in to WebTMA using the Technician role, the *Work Order* window Action



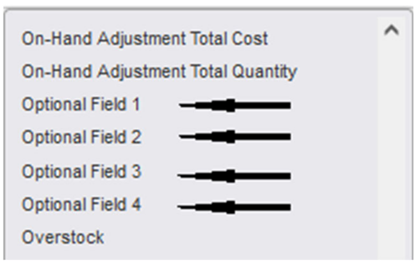
Path: *Work Order*

Menu now includes *Check Results*. This grants the logged-in Technician access to Task Check Lists.

Details:

Technicians can record work done using the Check List. It provides an easy way to document their work.

New OHA Fields in On-Hand Adjustments Report Form



Path: *Reports* > *Report Writer*

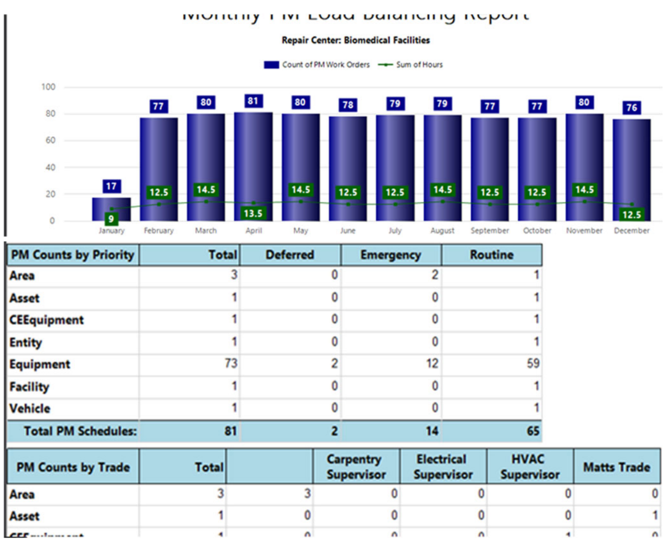
Summary: The new optional fields included on the *On-hand Adjustment Entry* flyout can be included in your Report Writer reports.

Details:

The fields labeled *Option Field 1*, *Option Field 2*, etc. are available for selection from the *Add Criteria* drop-down list.

September 17, 2024

New PM Load Balancing Reports



PM Counts by Priority	Total	Deferred	Emergency	Routine
Area	3	0	2	1
Asset	1	0	0	1
CEEquipment	1	0	0	1
Entity	1	0	0	1
Equipment	73	2	12	59
Facility	1	0	0	1
Vehicle	1	0	0	1
Total PM Schedules:	81	2	14	65

PM Counts by Trade	Total		Carpentry Supervisor	Electrical Supervisor	HVAC Supervisor	Matts Trade
Area	3	3	0	0	0	0
Asset	1	0	0	0	0	1

Summary: The PM Load Balance Report in WebTMA Report Manager is available to give you a view of your Preventive Maintenance program schedule throughout the year.

Using this report helps you ensure you have the correct amount of staffing to address PM work orders.

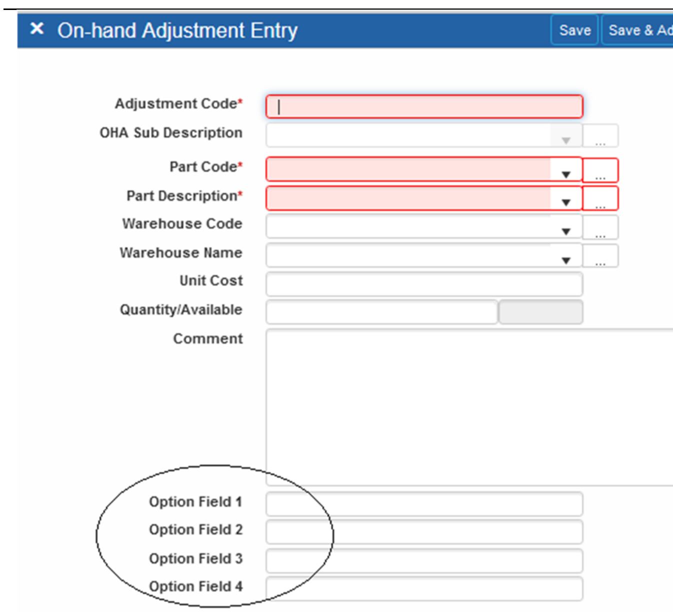
Details:

The projected hours are based on the estimated hours on the PM Schedule. Optional Report criteria is by Repair Center Name. Chart in the report provides a bar chart of work order counts that will generate in that month and the number of man-hours needed to complete based on estimated time. A further breakdown of PM work orders by Priority and Trade are listed in the grids.

Additional PM Load Reports are available from *Reports > Report Manager*, select *All > PM*.

This is our September Voice of The Customer Enhancement. We would like to thank CKS for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

New Optional Fields for On-Hand Adjustment



Summary: You now have the option to add as many as four different text fields to the *On-Hand Adjustment Entry* window to capture additional information about the inventory adjustment transaction (such as additional detail on why it is being made).

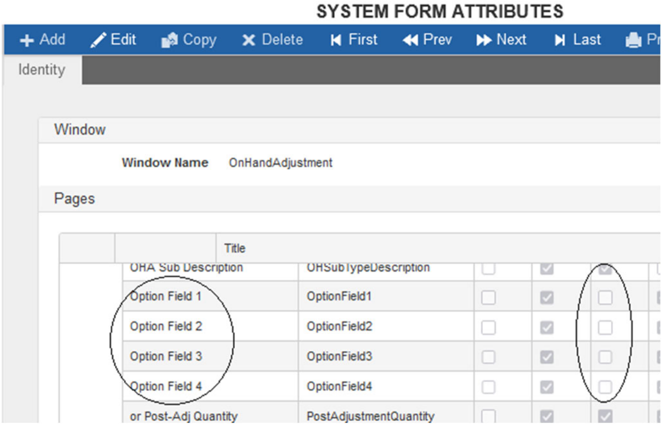
The fields are hidden by default.

Details:

The fields are labeled *Option Field 1*, *Option Field 2*, etc. as illustrated at left but can be renamed using Text Management (*Admin > Text Management*). These fields are alpha-numeric with a limit of 255 characters.

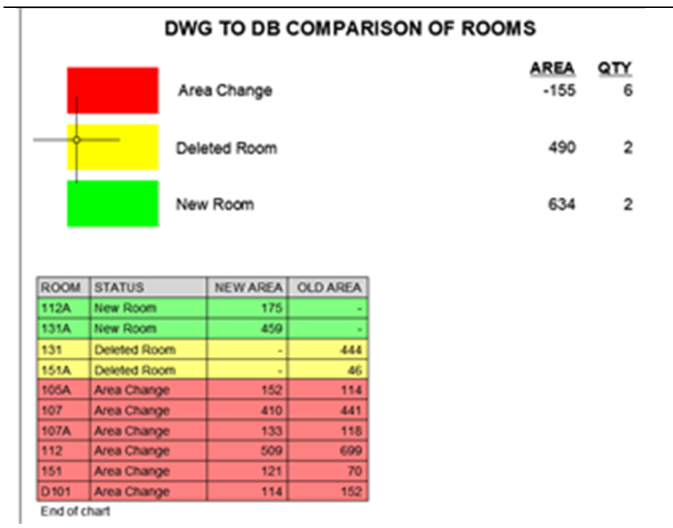
Since these fields may not be needed by all users, they are hidden by default. You can go to *System Form Attributes* to make one or more fields *Visible*.

Path: *Materials > On-Hand Adjustments*

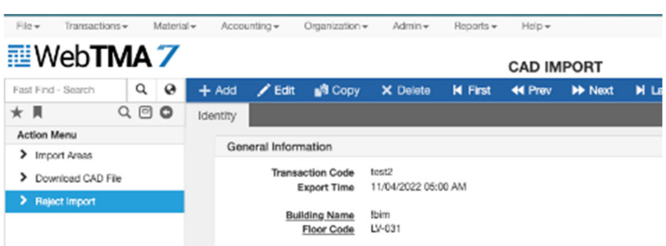


Path: *Admin > Form Attributes > System Form Attributes (OnHandAdjustment – On-Hand Adjustment Entry)*

Space Management Reject Pending Update Added



Space Management Comparison Table (Drawing to DB)



Path: *Admin > CAD Import*

Summary: Using the Space Management – CAD integration (the AutoCAD add-on), you can view and export drawing updates for Room Numbers and SQF to a staging table in WebTMA.

You now have the option to reject the imported data before committing the changes to the WebTMA database.

Details:

The drawing changes made are:

- Add a new room in the drawing (WebTMA can create a new Area record)
- Remove an existing room in the drawing (WebTMA can inactivate the record)
- Change square footage for an Area in the drawing (WebTMA can update the SQF for the Area record)

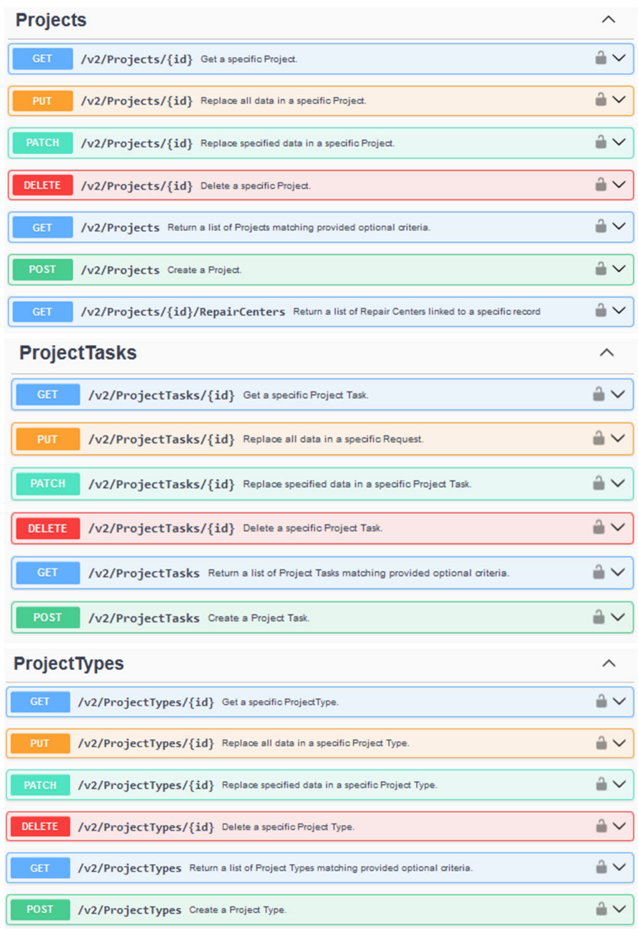
After the drawing updates are exported to WebTMA, they remain in a staging area for approval before committing the changes to the database.

From the *CAD Import* window, authorized users can either:

- **Import** the new information to the database by clicking *Import Areas* on the Action menu
- **Reject** the pending changes by clicking *Reject Import* on the Action menu to remove the transaction

If an export was made in error, the pending transaction record is deleted, and no changes are made to WebTMA Area records in the database.

Project Module API Endpoints Added



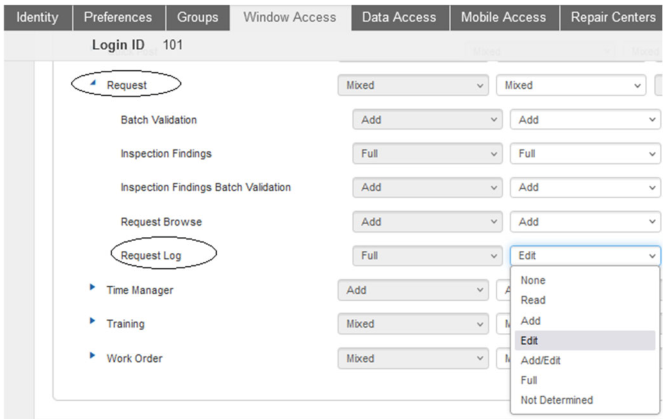
Summary: Project API endpoints are now available to integrate with your external project management systems. The endpoints include Projects, Project Tasks, and Project Types. This will allow you to create, update and monitor project records in WebTMA from an external system thus reducing or eliminating repetitive data entry.

Details:

You have endpoints for Get, Put, Patch, Delete, and Post.

These new APIs are fully described in our Swagger documentation.

Request Log Security Enhancement



Path: *Admin > User Management > Records / Window Access*

Path: *Admin > User Management > Groups / Window Access*

Summary: To tighten security on the *Request Log* page, new rules have been established. These changes ensure that the rules are enforced on both system windows and custom windows.

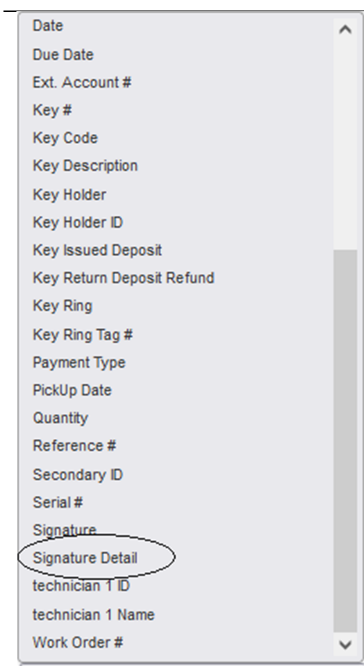
Details:

WebTMA looks at the user or group Window Access and applies the following rules.

Window Button	Requirement 1	Requirement 2
Accept	Edit on Request Log	Add on Work Order
Convert to Project	Edit on Request Log	Add on Project
Convert to Audit	Edit on Request Log	Add on CP Audit (Capital Planning)
Reject/Hold	Edit on Request Log	

As an example, to use the *Accept* button, a user or group must be granted *Edit* on the *Request Log* window **and** *Add* on the *Work Order* window.

Signature Detail for Lines in Key Adjustment Forms



Path: *Reports > Report Writer / Identity Tab*

Summary: When you create a new report in Report Writer, the *Report Criteria* drop-down list now includes **two** Signature selections.

This applies when you use the Signature feature for applicable windows.

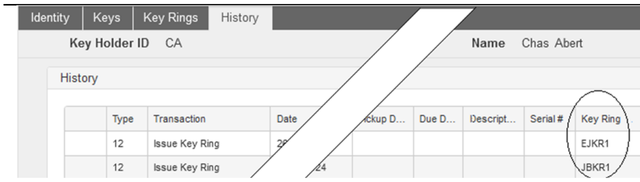
Details:

On the Key Adjustment Form, the *Signature* criteria pulls Signatures for the Header, i.e., one signature for several lines.

The *Signature Detail* selection pulls signatures for individual lines.

Including signatures in a report may be needed to display the physical signature captured, for example when issuing or returning keys. The report provides a physical document for the key holder to retain.

Key Holder History Tab Enhanced



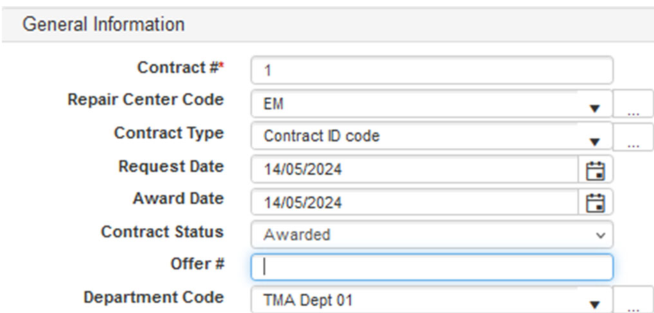
Path: *Material > Key Management > Key Holders / History Tab*

Summary: The Key Ring column on the Key Holders / History Tab now displays the *Key Ring Tag #*.

Details:

Previously, this column showed the Key Ring *Description*.

Contract Window *Offer #* Field Now Editable



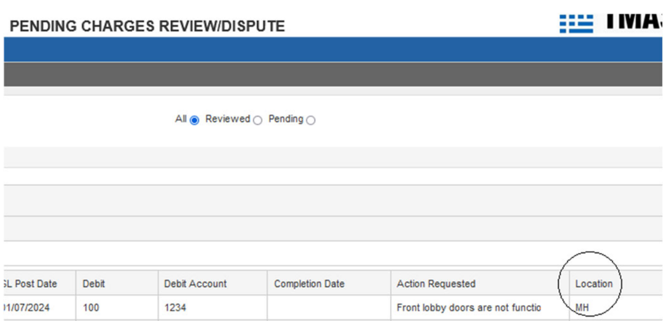
Path: *Organization > Contract > Records*

Summary: To allow more flexibility, the *Offer #* field on the *Contract* window can be edited even after a Contract is awarded.

Details:

WebTMA removed the restriction to assist clients who need to make modifications to the field. The *Offer #* can now be adjusted after the fact.

Pending Charges Review/Dispute Location Enhanced



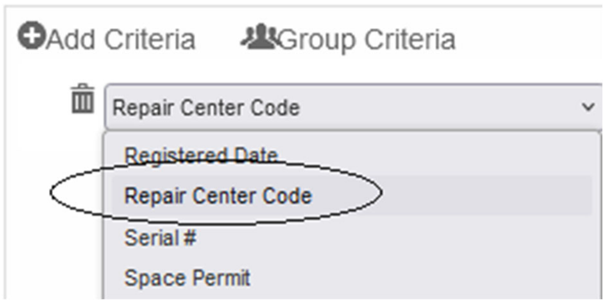
Path: *Accounting > Post Charges > Pending Charges Review/Dispute*

Summary: The *Location* column on the *Pending Charges Review/Dispute* window now shows the *Location ID*.

Details:

Previously, this column displayed the Location *Description*.

Criteria Added to Entity Window Selection



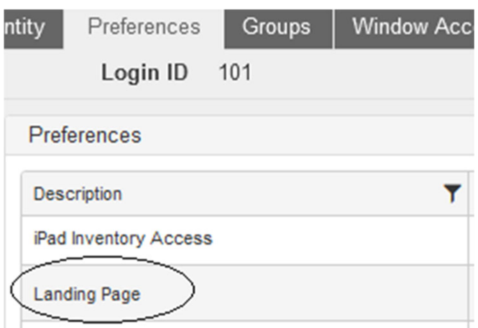
Path: *Organization > Entity*

Summary: A new criteria field selection is available on the drop-down selection list for the *Entity* window using Advanced Find (*Show the Search Panel*).

Details:

You can now choose *Repair Center Code* when making your criteria selections.

Preference Label Change – Landing Page



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

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

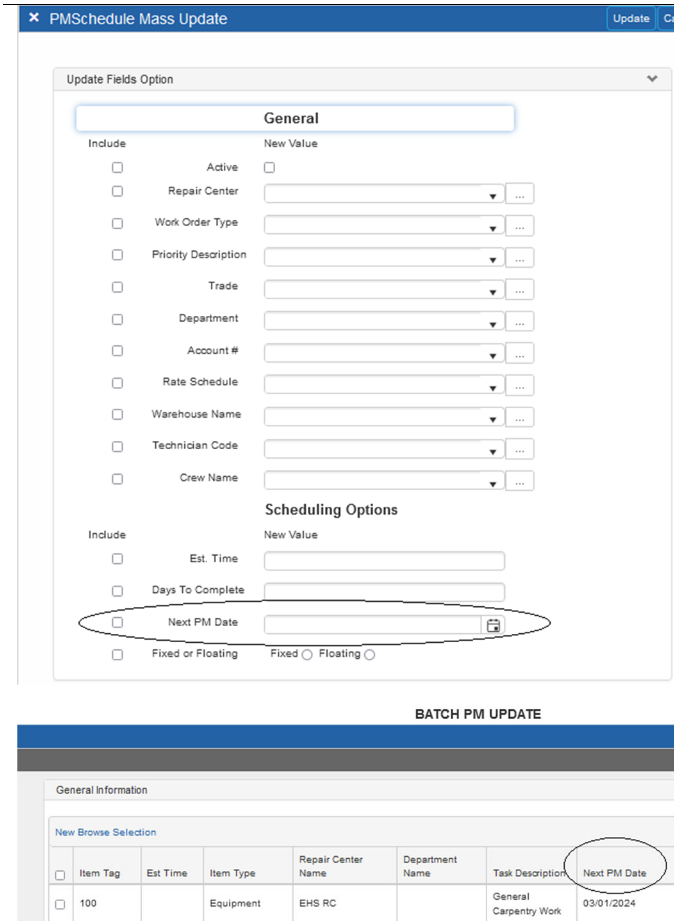
Summary: When it was first introduced, the Landing Page was identified in *Preferences* as *Use New UI/UX*.

Details:

The label has been changed. To grant user or group access to the Landing Page, look for *Landing Page* in User or Group *Preferences* Tab.

August 20, 2024

Next PM Date Added to Batch PM Update Window



Path: *Admin > Batch PM Update*

Summary: A new option, *Next PM Date*, has been added to the *Batch PM Update* window.

Details:

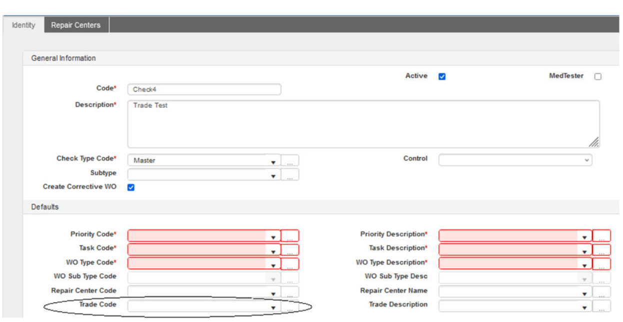
This addition makes it easy to mass update multiple PM schedules when a client needs to shift a batch to a different date.

Select the lines to change, choose the Mass Update button, and use the new field, *Next PM Date*, where you can change the date.

This change also helps with Load Balancing your PMs.

This is our August Voice of The Customer Enhancement. We would like to thank American Airlines, Tarian Group, and Johnson Controls for submitting this enhancement suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Trade No Longer a Required Field for Master Check



Path: *Organization > Task > Master Check*

Summary: Clients who use the *Create Corrective WO* option on the *Master Check* window and who also use the *Client Info / Preference* to *Force a Trade for Each Task*, were unable to change the Trade on the corrective Work Order.

Details:

This has been resolved by removing Trade as a required field on the *Master Check* window.

In addition, the Trade from the current WO is copied to the new WO that's being generated. This applies if the field is not populated. If populated, the system will use Trade selected.

New Columns on Work Order Task Grid

Path: *Transactions > Work Order > Records / Identity Tab*

Summary: Multi-task Work Orders now include two new columns in the *Task Information* Section. The new columns added to the grid are *Resolution* and *Failure Code*.

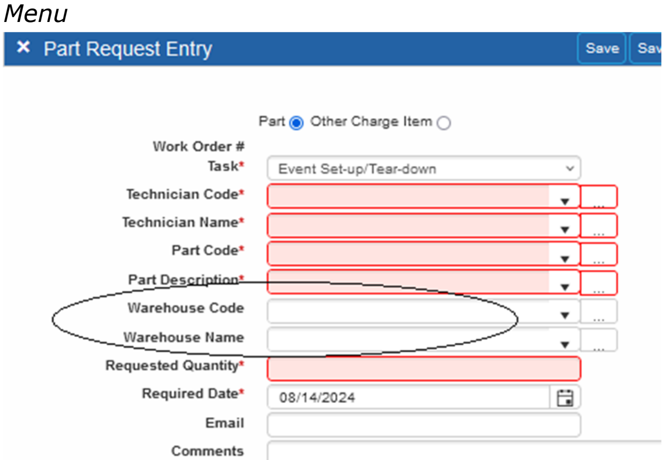
Details:

These new columns give you at-a-glance information about Tasks that have failed as well as how they were resolved.

The feature helps ensure that a Failure Code has been entered, which is useful when closing and completing WOs.

WO Part Request Enhancements Added to WO Action Menu

Path: *Transactions > Work Order > Records / Action Menu*



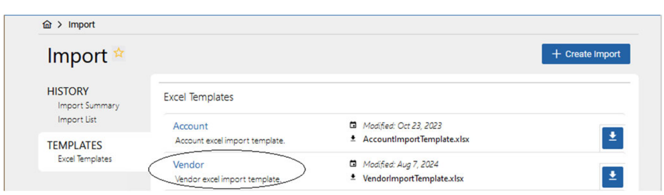
Summary: Adding Requested Parts to an existing Work Order has been simplified. Just select *Add Requested Part* on the WO Action Menu to open the *Part Request Entry flyout* with one click. When selecting the Part, you can also choose the Warehouse where the Part is stocked.

Details:

With the desired Work Order in *View* mode, click *Add Requested Part* on the Action Menu. The system automatically enables *Edit* mode, moves to the *Schedule* Tab, and opens the *Part Requested Entry* flyout ready for you to request needed Parts.

These enhancements provide easier navigation when requesting a Part and allow you to select the Warehouse where the Part is located.

Vendor/Manufacturer/Contractor Mass Import Now Available



Path: *Admin > Mass Import / Templates*

Summary: A *Vendor* Template has been added to the Mass Import list of Templates.

Details:

You can import Manufacturers, Contractors, and Vendors using this Template, which can be useful in several ways. For example, when you build a new distribution center or add another campus. In some cases, our clients have separate Departments like

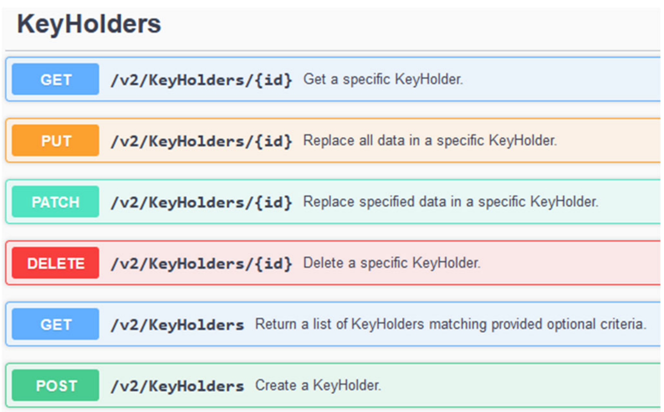
Facilities and Housing. If these are merged, you can import data from one Department to another.

It is also a good way to update existing information such as addresses and contacts.

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

Full details about the module are found at **Error! Reference source not found.** in this document.

Keys Module API Endpoints Expanded



Summary: We have enhanced our suite of API's by including several new Key-related API endpoints.

Details:

The windows included in this release are: Key Adjustments*, Keys, Lock, and Key Holders.

The list of Key-related APIs includes the following:

Key

Key Access

KeyAdjWorkOrderTask

KeyAdjustment

KeyAdjustmentDetail

KeyAdjustmentSignature

KeyAuthorizer

KeyHolder

HeyHolderKeyRing

KeyHolderKeyRingKey

KeyInstanceSerialNumber

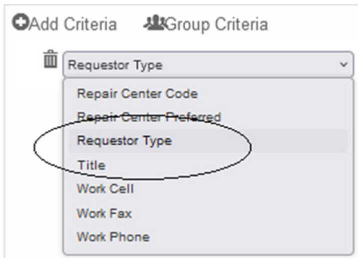
KeyTransactionSignature

The new Keys and Key Holder APIs are fully documented in our Swagger documentation here.

*__Note:__ Key Adjustments are a *ledgered* system, that is, they do not set data. Rather they are a log of activity on that key; therefore, Swagger does not have Patch or Put.

Criteria Added to Requestor Window Selections

Summary: Additional criteria field selections are now available on the drop-down selection list for the



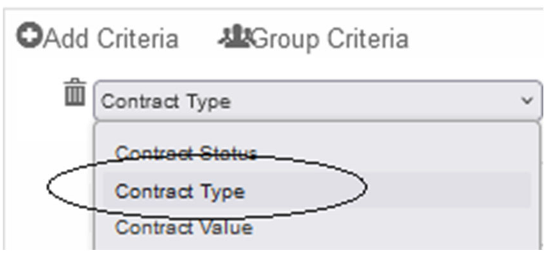
Path: *Admin > User Management > Requestors*

Requestor window using Advanced Find (*Show the Search Panel*).

Details:

Look for *Requestor Type* and *Title* to facilitate your search.

Criteria Added to Contract Window Selections



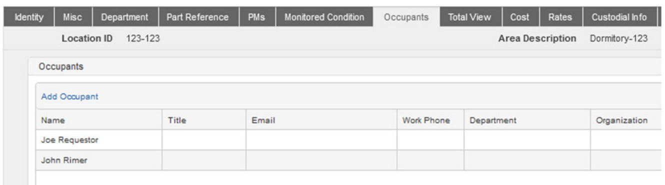
Path: *Organization > Contract > Records*

Summary: A new criteria field selection is available on the drop-down selection list for the *Contract* window using Advanced Find (*Show the Search Panel*).

Details:

Look for *Contract Type* to facilitate your search.

Add Occupants from Area Window



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

Summary: WebTMA Plus clients now have the option to assign Requestors as Occupants from the *Areas / Occupants* Tab.

Previously, this action was limited to WebTMA Base clients.

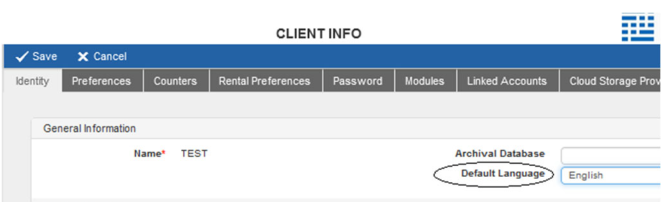
Details:

In the past, WebTMA Plus clients were required to assign individuals from the *User Management > Requestors* window.

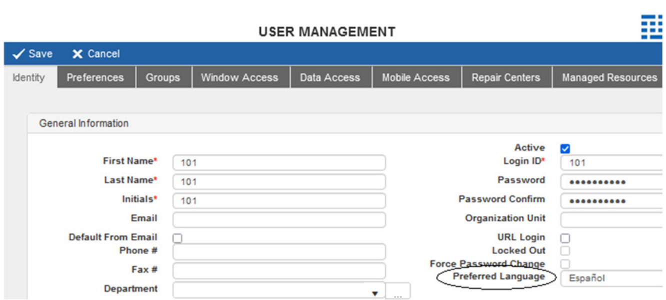
It is still true that when a Location is assigned from the Requestor record, the Requestor is automatically added to the *Areas / Occupants* Tab.

On the *Areas / Occupants* Tab in *Edit* mode, select the *Add Occupant* link on the grid to open the *Occupants Entry* flyout. Mark the desired check boxes and choose *Add Selected*. Once you save the record, the Occupants are added.

Languages Supported in WebTMA 7



Path: *Admin > Client Info / Identity Tab*



Path: *Admin > User Management > Record / Identity Tab*

Summary: WebTMA now supports languages such as Hindi, Punjabi, and Vietnamese for default text labels, menus, and messages. Words entered by your users in text fields are not translated (Comment field, Name field, Request, etc.).

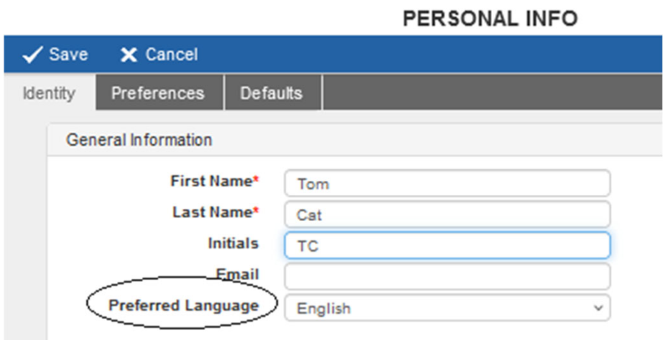
Details:

Your WebTMA Administrator determines the default language used in the application; however, individual users' preferred settings can be made from the User record or from the *File > Personal Info* window. These settings override the Client Info selection.

NOTE: If you change the personal or User record settings, log out of the system. When you log in again, you can see the language change.

The following list shows all the languages that are currently supported:

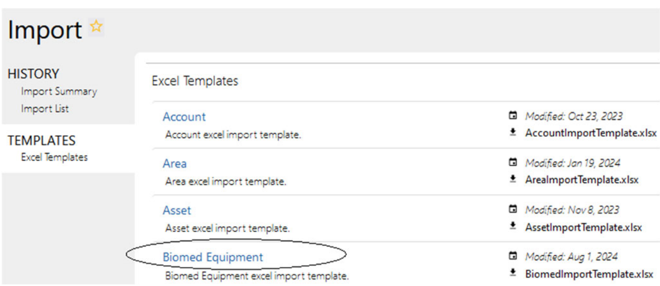
- English
- German
- Spanish
- Thai
- French (France)
- French (Canada)



Path: *File > Personal Info / Identity Tab*

- Portuguese (Brazil)
- Portuguese (Portugal)
- Chinese (Simplified)
- Indonesian
- Hindi
- Punjabi
- Hungarian
- Vietnamese

Biomed Mass Import Template Enhanced



Path: *Admin > Mass Import > Import Dashboard / Templates Tab*

Summary: The Mass Import Template for Biomed Equipment has new columns. This increases the number of fields available for import.

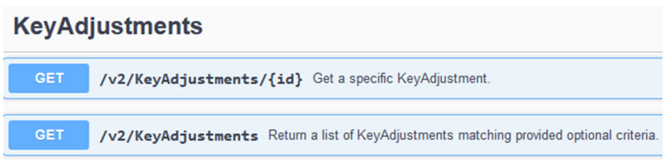
Details:

Look for the following new columns:

- Original PO #
- Status
- Software Version
- IP Address
- HIPAA Frequency
- HIPAA Comments
- Annual Rate
- Usage Flat Rate
- Owner Department
- Lease Expiration

July 23, 2024

New Key Adjustments and Locks Endpoints



Summary: Key Adjustment and Lock endpoints are now available. These APIs allow you to effectively manage access control and security within your facilities. They are fully described in our Swagger documentation.

Details:

If you use any of the following types of software, you can use these APIs to connect with a broader range of services and enhance overall utility.

- Key Management Software
- Access Control Systems
- Locksmith Dispatch and Scheduling Software
- Inventory Management Systems
- Customer Relationship Management (CRM) Software

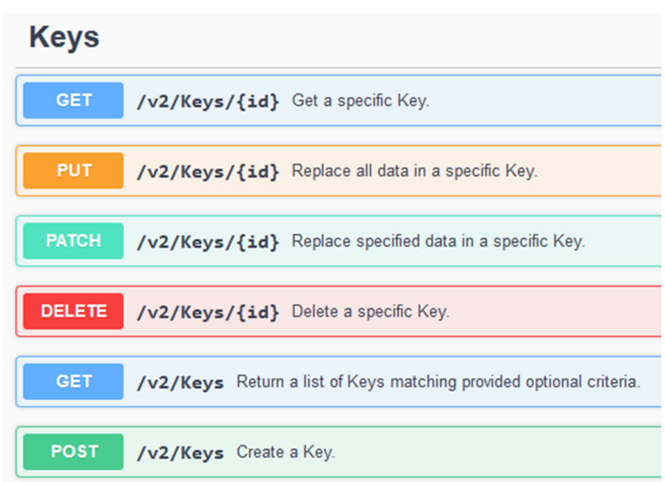
The Key Adjustments API facilitates the management of key assignments and inventories. This is crucial for operational security and efficiency.

The Locks endpoint is focused on managing locks installed on doors and other access points.

An additional endpoint for Key Adjustment creation will be available in a later release.

Click here to see lists of the API field names and corresponding default langstrings.

Keys and Key Holder API Endpoints Expanded



Summary: We have expanded our Swagger documentation for Keys and Key Holder API endpoints and Schemas. This change provides comprehensive documentation for Keys and Key Holders. They have been updated to document the full response schema.

Details:

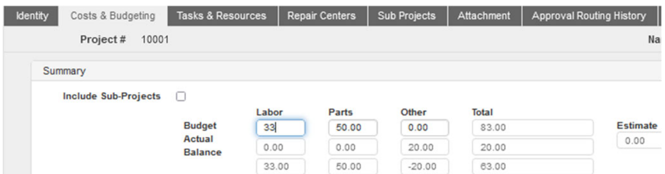
The endpoints now map to CREATE (POST), UPDATE (PUT and PATCH), DELETE, LIST (GET with no ID), READ (GET with ID).

These APIs are fully described in our Swagger documentation.

Click here to see lists of the API field names and corresponding default langstrings.

The langstrings are the default field labels. If your organization has changed the labels, check *Admin > Text Management* to verify the default name.

Edit Budgets for Projects with Estimates



Path: *Transactions > Project > Records / Costs & Budgeting Tab*

Summary: Projects with Estimates in WebTMA 7 now allow you to manually adjust the budget lines for Labor, Parts, and Other in most cases.

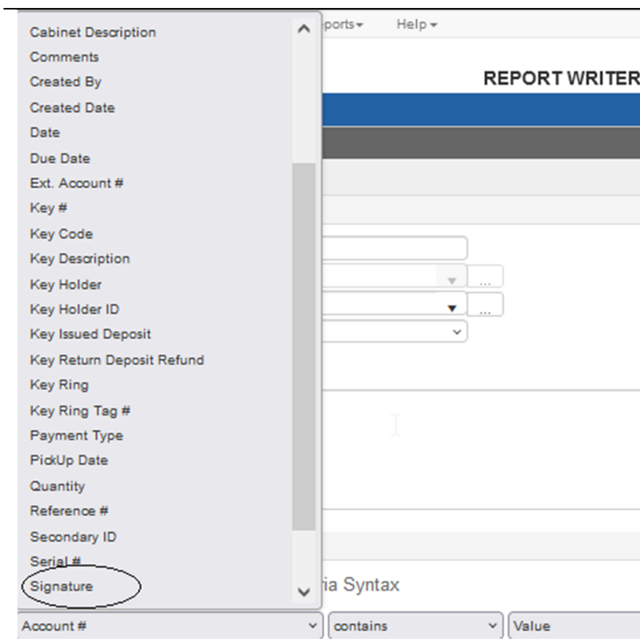
Previously, this action was prevented if the Project had an Estimate.

Details:

The following rules apply:

- If an estimate is attached and authorization is **not** required, you **can edit** the budget lines.
- If an estimate is attached and authorization is **required but not yet approved**, you **can edit** the budget lines.
- If an estimate is attached and authorization is required and **approved**, you **cannot edit** the budget lines.
- Budgets for Projects without an estimate can always be edited.

Signature Field Available in Key Management Report Forms



Path: *Reports > Report Writer / Identity Tab*

Summary: When you create a new report in Report Writer, the *Report Criteria* drop-down list now includes a Signature selection. This applies when you use the Signature feature.

Details:

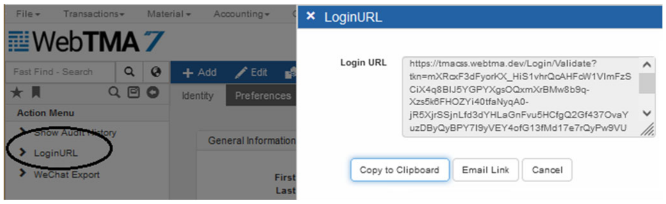
The selection is available for the following report forms:

- Key Adjustment
- Key Adjustment All
- Key Adjustment Detail

Including signatures in a report may be needed to display the physical signature captured, for example when issuing or returning keys. The report provides a physical document for the key holder to retain.

This can also be useful to provide receipts to departments that need physical copies with signatures.

Login URL with Enhanced Security



Path: *Admin* > *User Management* > *Records*

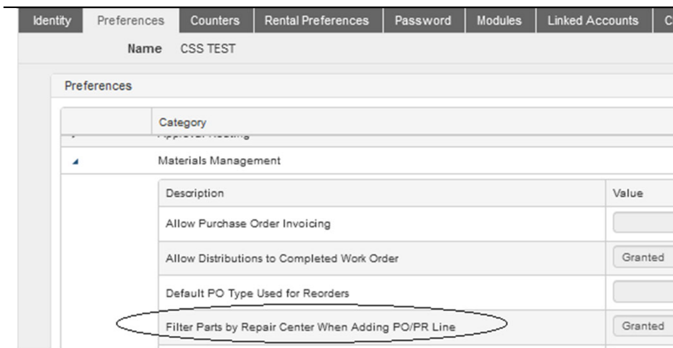
Summary: You can send a Login URL link to selected Users, Requestors, and Technicians that allows them to log in without using an ID and Password.

Anyone who has access to the URL can launch the application; therefore, a 24-hour expiration has been applied to resolve a security vulnerability.

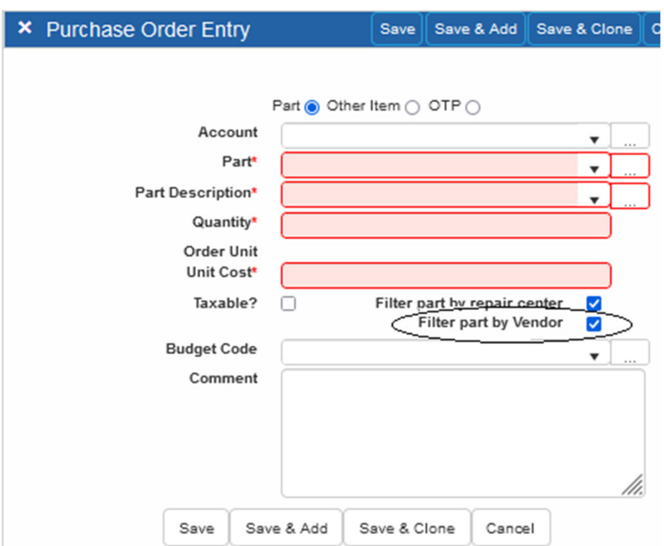
Details:

Any Login URLs you send to your users will expire in 24 hours.

Filter Parts by Vendor on PO/PR



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



Path: *Material* > *Purchase* > *Purchase Orders*

Summary: Part selections for both POs and PRs can now be filtered by Vendor if a setting is granted in *Client Info / Preferences*.

Details:

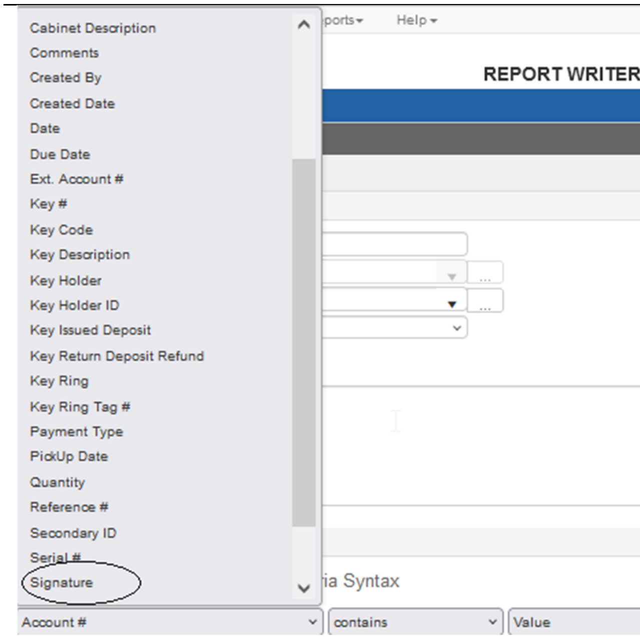
Grant the *Filter Parts by Repair Center When Adding PO/PR Line* in the Materials Management Category of *Client Info / Preferences*. Be sure to log out and log in again to see the change.

Associate parts to the vendor(s) where they will be purchased by navigating to the PR or PO windows and choosing the *Vendor Code*.

When adding parts, the *Part* flyout now includes a check box to *Filter Part by Vendor*. If checked, WebTMA filters Parts by matching the Part Supplier to the PO or PR Vendor.

We would like to thank Abercrombie & Fitch for submitting this enhancement suggestion. Moving forward as we bring client enhancement submissions to reality, we are going to do a better job of recognizing the client who submitted the suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Signature Field Available in Key Management Report Forms



Path: *Reports > Report Writer / Identity Tab*

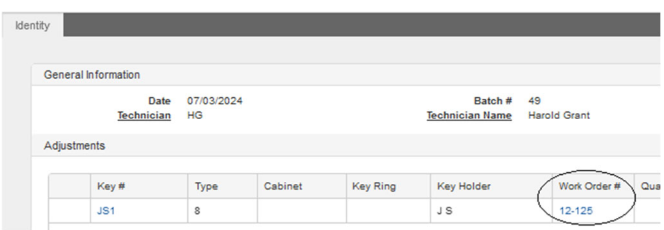
Summary: When you create a new report in Report Writer, the *Report Criteria* drop-down list now includes a Signature selection. This applies when you use the Signature feature for applicable windows.

Details:

Including signatures in a report may be needed to display the physical signature captured, for example when issuing or returning keys. The report provides a physical document for the key holder to retain.

This can also be useful to provide receipts to departments that need physical copies with signatures.

Hyperlink to WO from Key Adjustments



Path: *Material > Key Management > Key Adjustments*

Summary: You can add a Work Order reference when making Key Adjustments. The Work Order number is now hyperlinked to the Work Order Record.

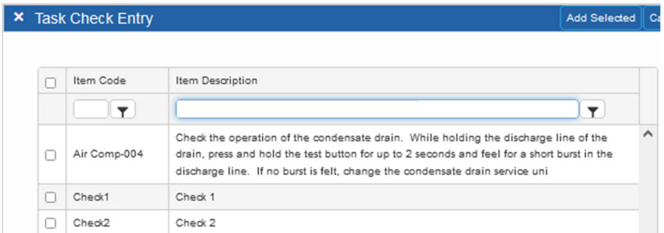
The *Key Adjustments* window is used for transactions regarding Keys such as creating, issuing, and returning Keys.

Details:

For ease of returning to a Work Order to make relevant updates, Key Adjustments records that include a Work Order number are now linked to the related Work Orders.

Click the Work Order number to open the Work Order record.

Search Option Added to Task Check List Flyout



Path: *Organization > Task > Records / Task Check List Tab*

Summary: When you select *Add Check* on the *Task / Task Check List* Tab, the *Task Check Entry* flyout now includes search fields to help speed finding checks.

The check items for Technicians to follow when they perform a Task are created from *Organization > Task > Master Checks*.

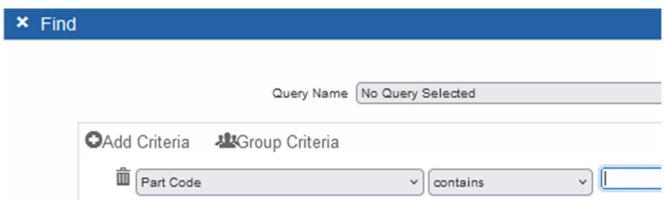
Once you have created the check list selections, they are available for selection from the *Task* Check *List* Tab).

Details:

The new search fields provide the option to search by either the Check *Code* or Check *Description*, where no search option was previously available.

This is helpful for clients that have many check items so they can quickly find the relevant items.

OTP Search Option for Purchase Requisitions

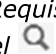


Path: *Material > Purchase > Purchase Requisitions*

Summary: OTP parts are now options in the *Find* window. If you have many OTPs, you can quickly search for those records in existing PRs by *Part Code*.

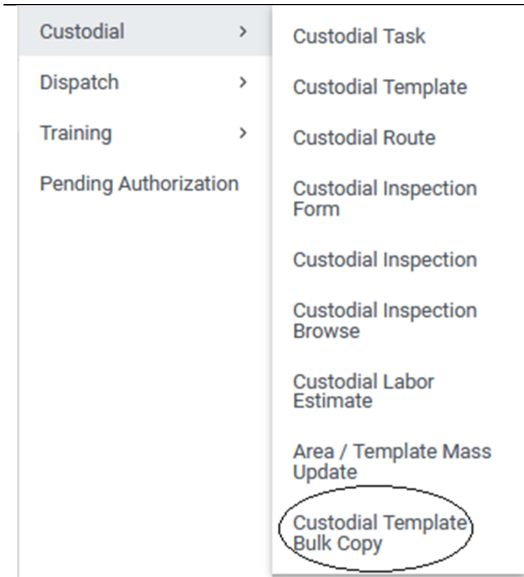
The Purchase Requisition module is used to request purchases for many reasons including One-Time Purchases (OTP) for materials or services.

Details:

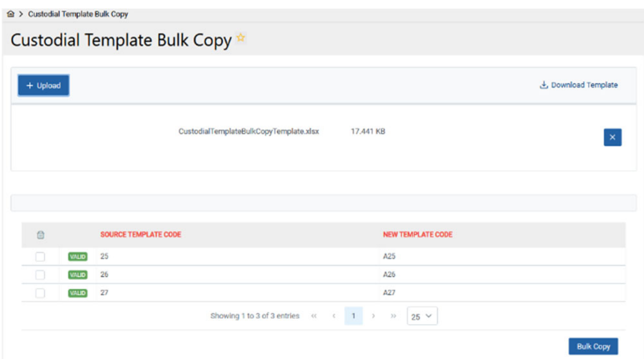
On the *Purchase Requisitions* window, choose the *Show Search Panel*  icon from the Navigation Panel.

Select *Part Code* as a criterion on the *Find* flyout and enter the full or partial OTP number to see the Purchase Requisitions that include the related OTP records.

Custodial Template Bulk Copy Window Added



Path: *Transactions > Custodial > Custodial Template Bulk Copy*



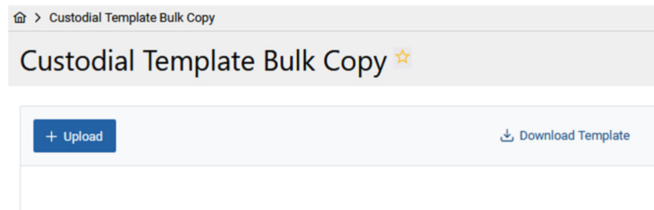
Path: *Transactions > Custodial > Custodial Template Bulk Copy*

Summary: To reuse Custodial Templates for other buildings or areas, you now have a quick and easy way to copy a batch of them using the *Custodial Template Bulk Copy* window.

The copies can be modified to accommodate new spaces without having to make individual copies.

Details:

The *Custodial Template Bulk Copy* is a clean interface that is easy to follow.



Simply click the *Download Template* link on the right.

The resulting Excel spreadsheet has only two columns:

Source Template Code	New Template Code
25	A25
26	A26
27	A27

When you have completed and saved the spreadsheet, return to the *Custodial Template Bulk Copy* window.

Click the *Upload* button at the upper left of the window and select the spreadsheet you saved.

The window displays a line-item list of the *Source* and *New* Template Codes and indicates if they are valid. This gives you the opportunity to amend the spreadsheet in case of errors.

If all entries are valid, click the *Bulk Copy* button at the lower right of the window.

The new templates are now available, and the window is clear.

Go to *Custodial > Custodial Template* and review the list of Records to view and amend your copied Templates.

June 25, 2024

Mass Import Template for Equipment Enhanced

New Columns in Template

Summary: The Mass Import Template for Equipment has new columns that accommodate users of the Make/Model feature. Make/Model makes it easy to establish records and add PM Schedules when you add large quantities of items of the same make and model.

For example, if you purchase a quantity of identical air conditioners, you can establish the PM Schedule in Make/Model and assign it when you import the new item information. Subsequent purchases of that same make/model can be imported and automatically receive the same PM Schedule. If changes are needed, you can update the Make/Model record, and the change is reflected on all records associated with that Make/Model.

Details:

If you want PM schedules to be created for the Make/Model Equipment being added, the following columns need to be present and valid. If any are not valid or not populated, the equipment is added but no PM Schedules are associated.

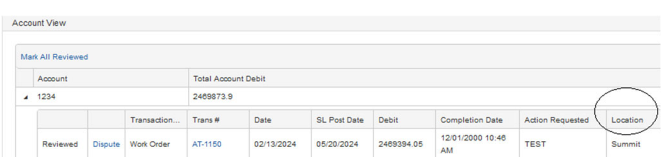
- One of the combinations below is needed. If Manufacturer, Model, *and* Equipment Type are present in the template, then the lookup for the Equipment Make/Model is based on Manufacturer and Model.

  - Make, Manufacturer, and Model

  - Make, Type and Sub-Type (if Sub-Type is used), or Type only

- Base PM Date
- Trade (if M/M PM schedule does not have a Trade, the Trade from the template is used)
- Repair Center

Billing Review/Dispute (WebTMA Plus) Enhanced



Path: *Accounting > Post Charges > Pending Charges Review/Dispute*

Summary: Authorized users or requestors can review and dispute charges related to account transactions based on Department records from the *Pending Charges Review/Dispute* window.

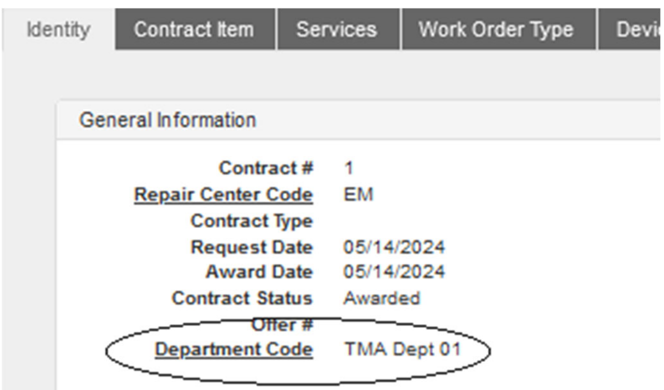
The Sub-Ledger Browse form now has an additional column.

Details:

If your System Administrator has performed Review/Dispute Administrative Setup, you can create a Batch Job to *Post Charges to Sub Ledger* that allows you to review the charges and dispute questionable items.

The *Account View* section of the window now includes the *Location* column to save you time when reviewing the records.

Contracts Window Department Field Added



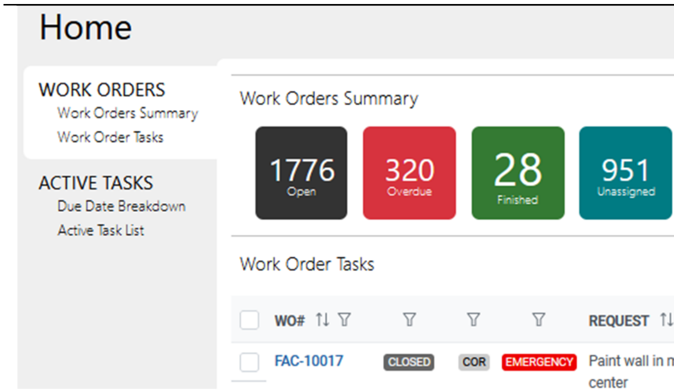
Path: *Organization > Contract > Records / Identity Tab*

Summary: You can award contracts to outside contractors after a bid process. Information about the Contract is recorded on the *Contract* window.

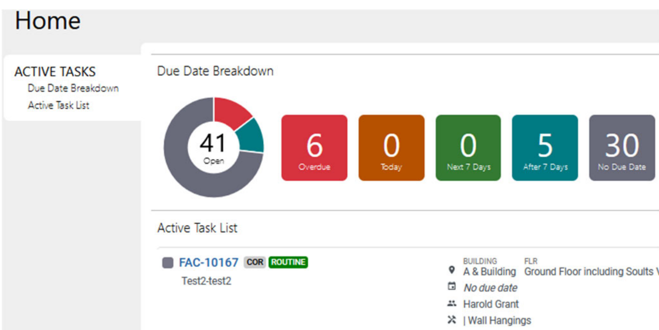
Details:

The *Department Code*, a new field on the *Identity* Tab, helps you identify the Department associated with the contracted work. This is an elective field.

Landing Page Revision



Supervisor's View



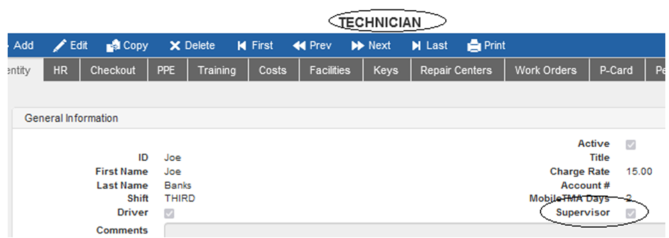
Non-supervisor's View

Summary: The Landing Page has two Tabs: Work Orders and Active Tasks. The *Work Orders* Tab is useful for Supervisors, but not other users. With this revision, only users with the *Supervisor* check box marked will see the *Work Orders* Tab.

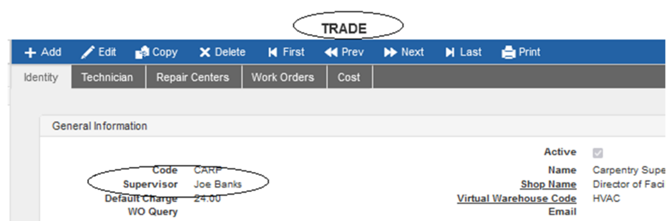
The change makes it faster for logged-in Technicians to see their Tasks without using extra clicks and ensures they do not have access to mass update functionality.

Details:

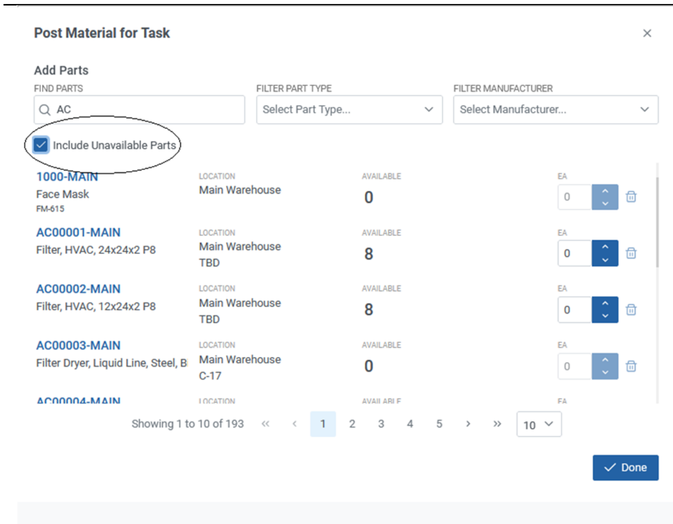
If the logged-in user has the *Supervisor* check box marked on their *Organization > Repair Centers > Technician* record, the *Work Orders* Tab is visible.



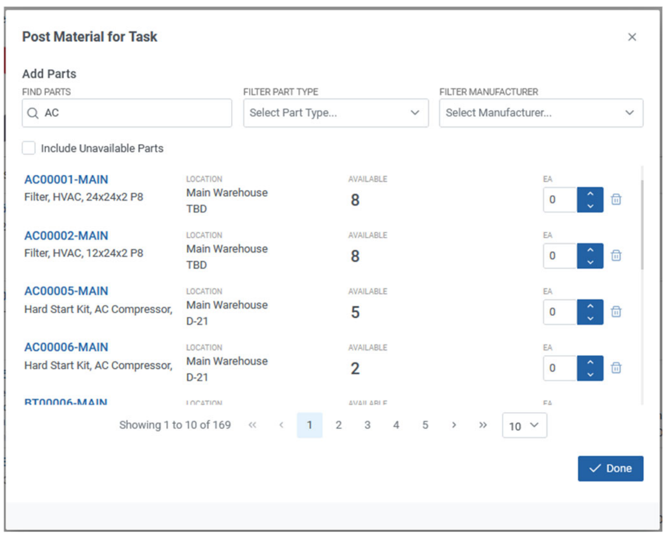
The work orders that display on the landing page are limited to Trades that the logged-in supervisor manages as designated from the *Organization > Repair Centers > Trade* record.



Parts Available List Refined for Landing Page

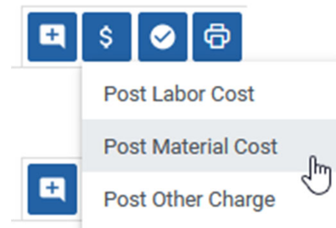


Default View – Include Unavailable Parts



No Unavailable Parts

Summary: Material Costs can be posted to a Task from the *Active Tasks* Tab on the Landing Page, and, by default, the parts list includes unavailable parts.



The selection list that displays when you click the + *Add Part* button now offers an option to remove from view the parts that have an available count of 0.

Details:

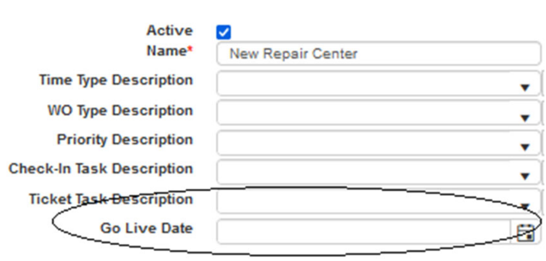
We have added an *Include Unavailable Parts* check box on the *Post Material for Task* popup window. The box is marked by default.

When you clear the check box, parts that show an available quantity of 0 are removed from the list. This is a toggle action. If you mark the check box once more, the zero quantity lines reappear.

The screenshots at left illustrate the location of the check box and the different views.

If you have a long list, it may take a moment to revise the page.

Go Live Date for New Repair Centers



Path: *Organization > Repair Center > Record / Identity Tab*

Summary: A *Go Live Date* field has been added to the *Repair Center / Identity Tab General Information Section*. It allows you to add an effective date for Make/Model PMs when you add a new Repair Center.

This is useful for clients that set up a new Repair Center in advance of using it. When you add a new Repair Center to accommodate a new department or location, for example, a date in this field prevents PMs from being generated before they are needed.

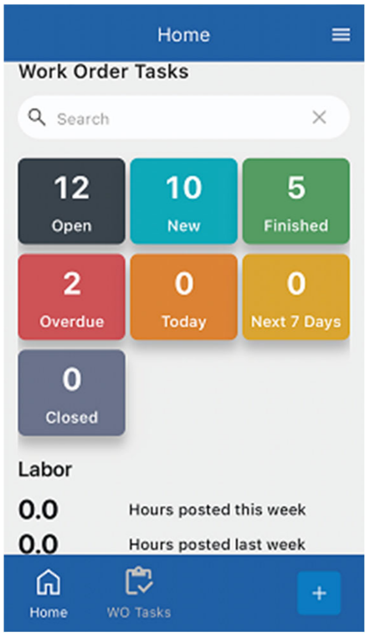
Details:

The date is only used when Make/Model creates new PM schedules. It will not be used for or impact manual entries or existing schedules.

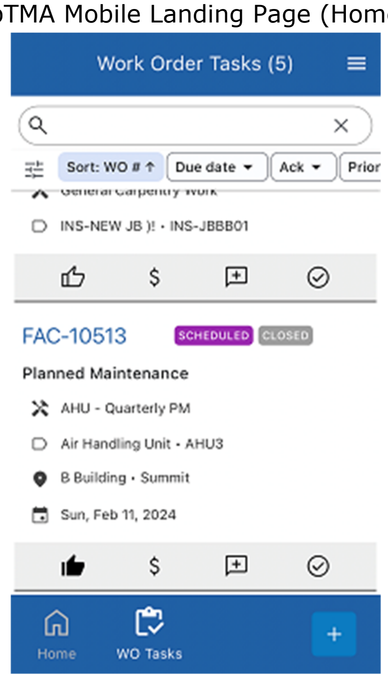
The date selected in this field prevents PMs from being generated until after the *Go Live Date*. For example, if you have a monthly PM on an item and the Go Live Date is 8/1, rather than setting the PM next date to the date the record is created, the PM date is pushed to 8/1 to align with the Go Live Date. Once the date is reached, it is for information only.

May 28, 2024

WebTMA Mobile Preview Release (v7 SaaS)



WebTMA Mobile Landing Page (Home Page)



WebTMA Mobile Task List Page

Summary: The Preview version of the new mobile application is available for both Android (v13 or later) and iOS (v16.0 or later) devices. This Preview release is only available to SaaS clients who are using WebTMA7.

WebTMA Mobile includes simplified navigation with fewer clicks and easy-to-access buttons for common transactions like posting labor, parts, and other charges.

This version of the mobile application does not include inspections or offline, but those features are planned for an upcoming release.

A user licensed for mobileTMA GO can also use the new WebTMA Mobile app under the same license. An additional license is not required.

Details:

Here are some of the features in the WebTMA Mobile Preview.

Posted Hours in view on the landing page. A quick glance after login tells Technicians how many hours they posted this week and last week.

Labor, material, and other costs are available. All users can see the costs included in the task.

Finishing/Completing work orders gives the technician a view of all costs and comments.

Common task filters are easily accessed using tiles on the landing page, such as *Open*, *New*, and *Today*.

Technicians acknowledge work order tasks with one tap.

Easy access to and visibility of attachments with the ability to add pictures, videos, and documents from the mobile device (same limitations to size as in WebTMA).

Comments can be dictated using the dictation feature of the mobile device.

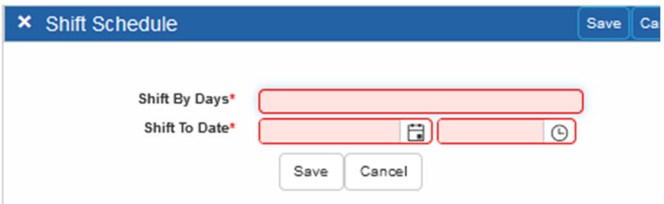
All task and general comments associated with the task are visible to all users.

Coming Soon in Fall 2024:

- Single Sign-on
- Master Checks

- Scanning
- Mobile Timer
- Seamless Offline Use

Shift Schedule Option for Scheduler



Path: *Transactions > Time Manager > Scheduler - Action Menu - Shift Schedule*

Summary: When unscheduled events occur which impact work order scheduling (illness, vacation, holidays, etc.), you can easily change technicians' scheduled assignments by a specified number of days or a specific date.

Details:

In the grid, check the desired technician lines and select *Shift Schedule* on the Action Menu.

Both Days and Dates can be moved forward or backward.

Shift By Days. Enter the number of days to move the work. A negative value shifts work to an earlier date.

Shift To Date. Select a date and time before or after the current date.

Click the *Save* button on the flyout, and then choose *Save* on the WebTMA toolbar.

Default Grid Records Returned Expanded

Summary: Many clients have requested that we increase the number of records returned in the grids to reduce the number of pages you have to scroll through to see your data.

Details:

Most grids now display 25 rows compared to the 10 records returned in the past. We limited the records returned by default to optimize system performance.

Examples of grids updated to the higher record count include:

- Work Order > Labor/Parts/Other Charges
- Quick Post Cost
- Project > Task & Resources
- Purchase Order > Purchase Order Lines

See the example below of the Work Order Labor grid.

Labor

	Technician	Task Description	Trade	Time Type	Date	Shift	Hours	Total Cost	Charge	No Charge	Tax Amount
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	1.00	15.00	15.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	2.00	30.00	30.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	3.00	45.00	45.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	4.00	60.00	60.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	5.00	75.00	75.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	6.00	90.00	90.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	7.00	105.00	105.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	8.00	120.00	120.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	9.00	135.00	135.00		
	Joe Banks	General Elevator Work	Plumbing Manager	Regular	05/24/2024 09:35 AM	3rd Shift	9.00	135.00	135.00		

1 2

1 - 25 of 32 items

Work Request API

Summary: A new, easier to use, Work Request API has been added to our API suite. This API is designed to accept system codes rather than database ID's for most of the lookup fields available for the creation of a Work Request (Service Request). The current Work Request API requires multiple API calls to look up database IDs for fields like Request Type, Repair Center, Facility, Building, etc.

The new API option allows clients to pass the system visible codes instead of the database ID. This is a new API (additive) and will not replace the existing API (Requests). Any client using the current Requests API can continue to use that API as is.

Details:

WorkRequest. The new WorkRequest API is fully documented in our Swagger documentation here.

This new API is easier for clients to consume and requires fewer API calls. This API is used to create (Post) and obtain status (Get) for Work Requests (Service Requests).

WorkRequest

POST /v2/WorkRequest Create a WorkRequest

Sample request:

```
POST https://webtma.com/platformapi/v2/WorkRequest
{
    "externalID": "CX-123",
    "requestTypeCode": "PM",
    "repairCenterCode": "RC123",
    "taskCode": "007 Task",
    "departmentCode": "100x113342",
    "equipmentTagNumber": "Yu20210510x31LM",
    "facilityCode": "00001",
    "buildingCode": "!!1BIM",
    "floorNumber": "!!1BIM1021-3",
    "roomNumber": "9000",
    "requestorName": "John Doe",
    "requestorEmail": "mail@example.com",
    "requestorPhoneNumber": "9189999999",
    "requestDate": "2024-04-09T14:25Z",
    "actionRequested": "Request Description",
    "recommendedAction": "Recommendation",
    "dueDate": "11/12/13",
    "subLocation": "Sub Location",
    "equipmentDescription": "Equipment Description",
    "accountCode": "A",
    "comments": "Comments"
}
```

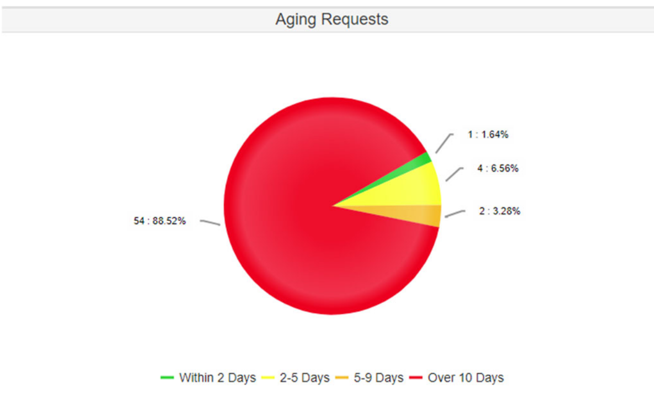
GET /v2/WorkRequest/find Get Request information.

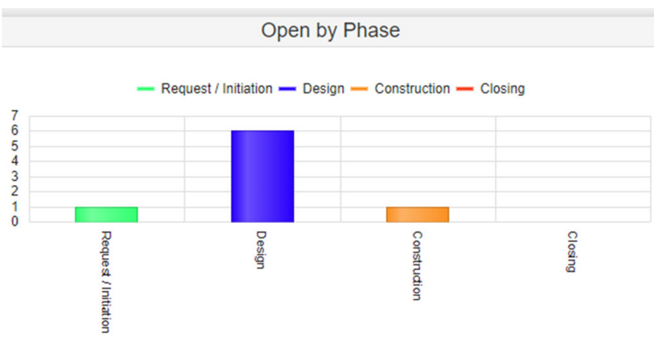
Retrieves request information using a supplied query parameter. Using ExternalId or TMARequestNumber or TMAWorkOrderNumber. In that order. Only one parameter should be supplied.

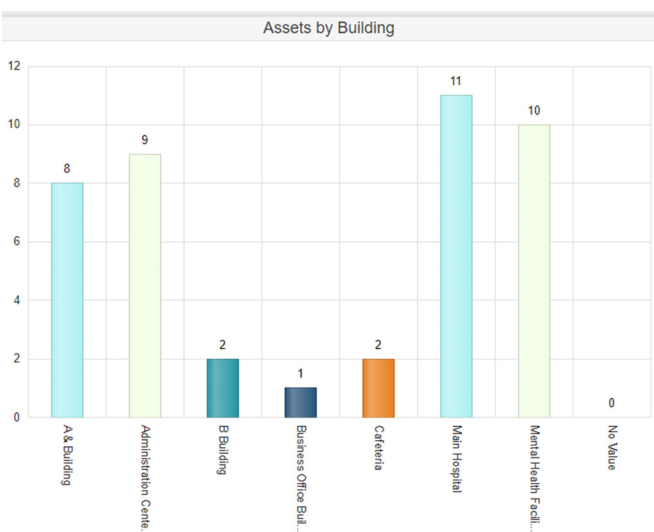
Sample requests:

```
GET https://webtma.com/platformapi/v2/WorkRequest/find?externalID=CX-123
GET https://webtma.com/platformapi/v2/WorkRequest/find?TMARequestNumber=RQ-1
GET https://webtma.com/platformapi/v2/WorkRequest/find?TMAWorkOrderNumber=WO-1
```

Executive Dashboard Enhancements







Summary: Based on the large number of requests from clients familiar with the v5 Dashboard functionality, we have added several enhancements to the v7 Dashboard. This results in a v7 Dashboard that has the best of v5 and the ease of use from v7.

Details:

Responsive Content. The contents grow or shrink with the size of the box and are centered within the box. Previously, the font was difficult to read because of the smaller size, and it had too much unused white space.

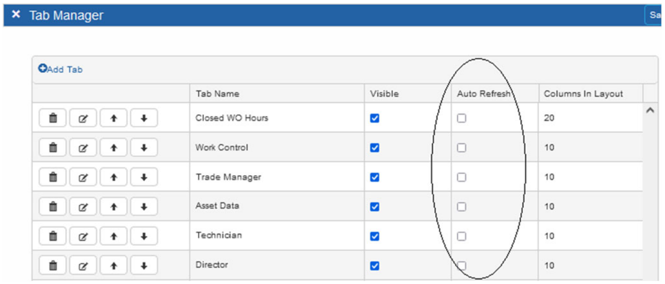
Pie Chart Legend. The legend was moved to the bottom from the right side. This allows the font to be larger and eliminates the cutoff that occurred with some configurations.

Ability to Create Wider Dashboards. If you want to display more controls on a single row and take advantage of larger monitors/screens, the Dashboard now provides a way to set the number of columns to display. This allows you to maximize the dashboard area and reduce or eliminate blank spaces on the right. To use this new feature, click *Manage Tabs* on the Action Menu and enter a number in the *Columns in Layout* column on the Tab Manager flyout. One column equals 150 pixels (px).

Bar Chart Labels. Bar chart labels are now displayed vertically by default. This eliminates the way horizontal labels overlapped, and many became impossible to read. With the move to vertical, we realized that large labels caused the label area to compress the bar chart area. To prevent this compression, we have set the maximum label length displayed to 20 characters. In the near future, we will add a configuration option that allows you to configure the label orientation (horizontal, vertical, diagonal).

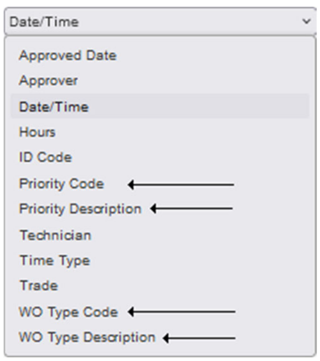
Segment Color Highlights for Digital Controls. You can now define different colors based on the number returned in the control. This provides a quick visualization to let you know if everything is running optimally in your organization or if an area needs attention. As an example, if you have a control that displays the count of past due work orders, you can specify green for readings of 0-10, yellow when readings are between 11-50, and red for readings between 51-999,999. For the final range, be sure to select a value that can never be attained.

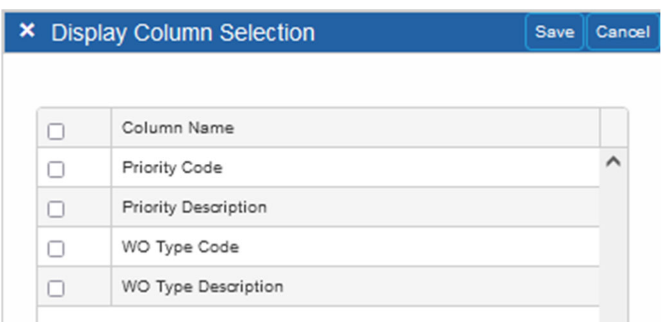
Refresh Frequency. With the last release, we introduced automatic refresh for Dashboard tabs that were checked. In the 4/30/2024 release, the refresh frequency was automatically set to every fifteen (15) minutes. In the current release, the refresh frequency has been changed to every five (5) minutes. In a future release, we will add configurability where you can better control the frequency of the refresh rate. While it does not auto-cycle through the tabs, this will be added in a future release.



Action Menu: *Manage Tabs – Auto Refresh* Column

Time & Attendance New Criteria





Path: *Transactions > Time Manager > Time & Attendance*

Summary: To allow you to review labor hours by Work Order Types or by Priority, new criteria have been added to the Time & Attendance query for *WO Type* and *Priority*.

Details:

When you add these new criteria, you can do the following:

1. Click the *Display Column* sub-tab.
2. Select *Add Column*.
3. Check any of the boxes in the *Display Column Selection*.
4. Save the Query with a unique name.

You can use the saved Query in a Dashboard based on labor lines, for example, 'Number of Hours Completed by WO Type'.

UFI Export Date Now Uses 24-Hour Format

Path: *Accounting > UFI > UFI Export Data*

Summary: The date format has been changed from HH to HH24.

Details:

Some Oracle database versions were having difficulty processing the date/time format used by the UFI application. They required the 24-hour format. If you export UFI data to an Oracle Database, the new date format will be applied. SQL Server integrations remain unchanged.

UFI Segment Validation Feature Added

Path: *Accounting > UFI > UFI Segment*

Summary: The UFI Segment entry now checks to confirm that the account number entered is valid. This helps avoid failures in the interface due to mistyped account numbers.

Details:

When you enter data for the account, the system checks to verify if it is a valid entry. If invalid, you are alerted.

Task Code Character Length Increased

Path: *Organization > Task > Records*

Summary: The length of Task Codes has been increased from a maximum length of 14 characters to 30 characters.

Details:

Several clients requested this change to make use of ASHRAE codes which can be up to 21 characters in length. We expanded to 30 characters to assure we had ample space to accommodate future Task Code configurations.

Alert Based Work Orders with Smart Building Integration

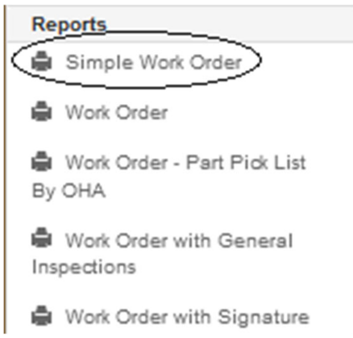
Summary: WebTMA 7 now integrates with BACnet to communicate with Building Automation Systems (BAS) or Business Management Systems (BMS). An additional module is required to utilize the BACnet integration.

Details:

For TMA clients that have BAS or BMS in use, BACnet monitors the readings and can communicate alerts to TMA to trigger work orders when a BAS or BMS alarm occurs.

April 30, 2024

Work Order Report Optimized



Path: *Transactions > Work Order > Records*

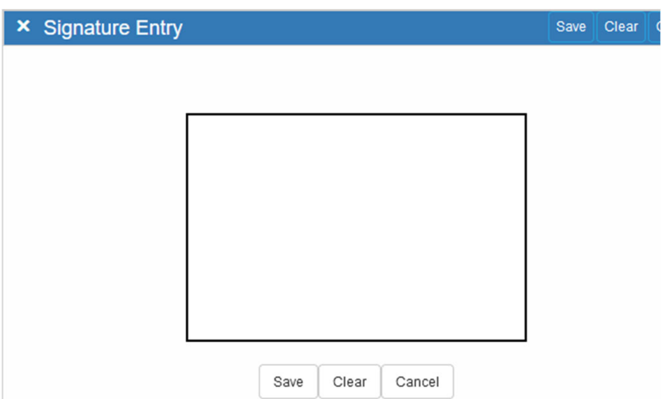
Summary: A simplified Work Order report is available from the *Work Order* window.

Discussion:

To speed up the running time, the Work Order report has been optimized. The new report is named *Simple Work Order*.

For cases where you need more details, the original Work Order report is still available.

Signature Feature Added to Several Windows



Path: *Material > On-hand Adjustments*
Path: *Material > Parts > Transfer Parts*
Path: *Material > Sales > Sales Order*
Path*: Transactions > Quick Post > QP Material*
Path*: Transactions > Quick Post > QP Cost*
Path*: Transactions > Work Order > Records*
Path: *Organization > Areas > RI Inspections (per line item in the grid)*

Summary: You now have the option to add physical signatures to many other windows.

Discussion:

The feature is now available on the *Action Menu* of the following windows:

- On-hand Adjustments
- Sales Orders
- Transfer Parts
- Work Orders *

Signatures can only be added in *Add* mode and cannot be edited or altered.

If *Client Info / Preferences–Materials Management* "Require Signature on Material Transaction" is granted, the following windows have a signature window on big Save.

- Quick Post Material
- Quick Post Cost
- Work Orders *

In the case of Room Inspections, line items can have a signature added using the signature icon .

- Room Inspection

* Work Order signatures can have two possibilities. The first is available from the Action Menu. The second occurs if *Client Info / Preferences–Materials Management* has "Require Signature on Material

Transaction" Granted, then the system will force a signature after big Save **when a Material Cost is added**.

Executive Dashboard Enhancements

Summary: The Dashboard controls have been significantly updated.

Discussion:

Graphs are more responsive. The contents grow or shrink with the size of the box and are centered within the box.

You can configure the Dashboard refresh frequency.

You can now set the color saturation for segments.

Accessibility Improvements

Summary: Various accessibility improvements have been made throughout the application.

April 16, 2024

UFI Export Date Default Changed

Path: *Accounting > UFI > UFI Export Data*

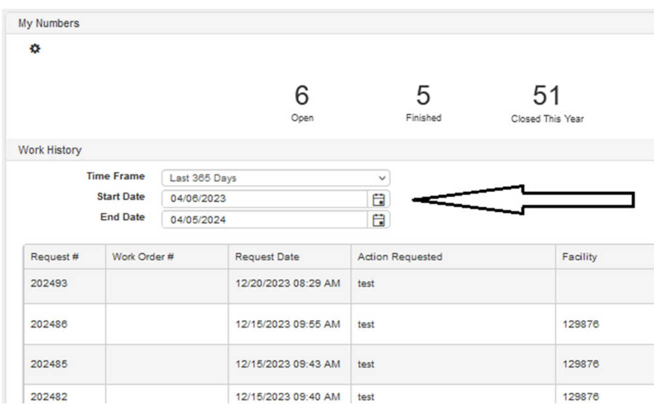
Summary: If a date format is not set up for the UFI Template, a new default is applied.

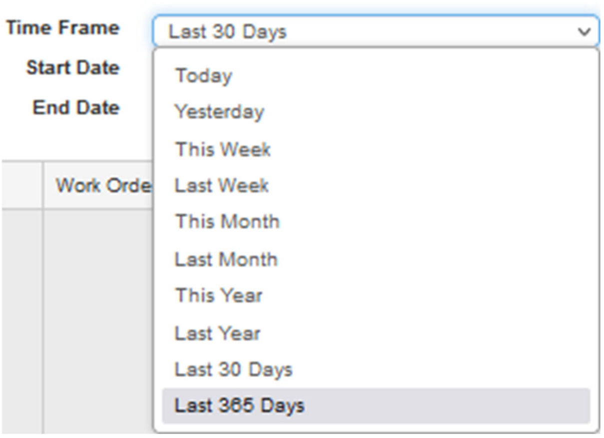
Discussion:

When you do not set up a date format for the UFI Template, the output for flat files and SQL Server will default to the following 24-hour format:

`yyyy-MM-dd HH:mm:ss (example: 2024-04-04 17:05:37)`

Requestor Login – Request Status Browse Date Range Added





Summary: The *Work History* grid now includes fields to set the Time Frame for viewing and reporting.

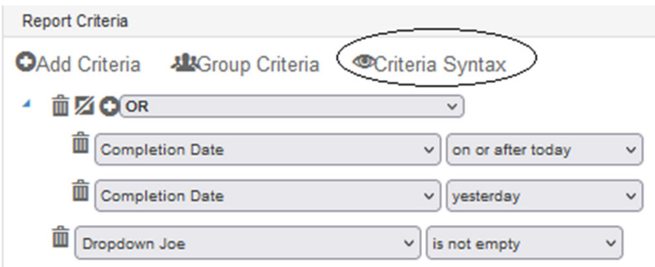
Discussion:

The default is the *Last 30 Days*, but you have the option to select any of the options illustrated at the left.

You can also search up to one year of historic data, and **you can determine the year to be searched**. If you need to see, for example, FY 2020-2021, just enter a *Start Date* of 07/01/2020 and *End Date* of 06/30/2021.

Pending Request results are also limited to the specified range.

Report Writer – Report Criteria Syntax Link Added



Path: *Reports > Report Writer / Identity Tab*

Summary: When you add Report Criteria to your report, you now have a link to display the Syntax of your criteria.

Discussion:

The *Criteria Syntax* link is available in *View*, *Add*, or *Edit* mode.

Click the link to open the *Criteria Syntax* flyout to see the syntax.

Mass Import Template for Fuel & Oil

Path: *Admin > Mass Import > Dashboard*

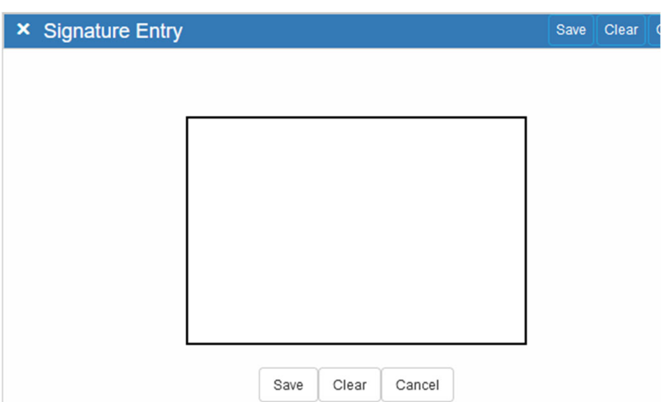
Summary: A template has been added to the Mass Import tool for Fuel & Oil.

Discussion:

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

Full **Details** about the module can be found at Mass Import Module here.

Signature Feature Added to Key Adjustments



Path: *Material > Key Management > Key Adjustments*

Summary: You now have the option to add a hand-written signature to Key Adjustment transactions.

Discussion:

The signature can only be added in *Add* mode and cannot be edited or altered.

For an adjustment that qualifies, use the  *Signature* button for each line item or *Signature* on the Action menu.

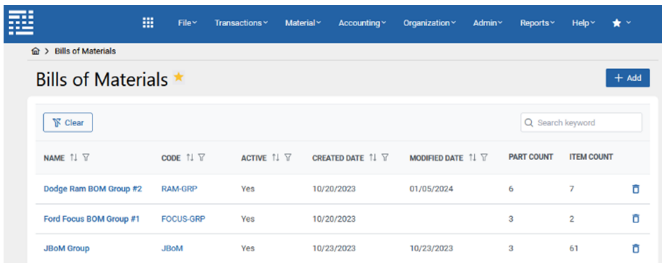
Other modules that qualify for signature will be available in the next release.

April 2, 2024

Maintenance Only

The April 2, 2024, release of WebTMA 7 is for maintenance only. There are no new features.

Bill of Materials Table View



Path: *Material > Bill of Materials*

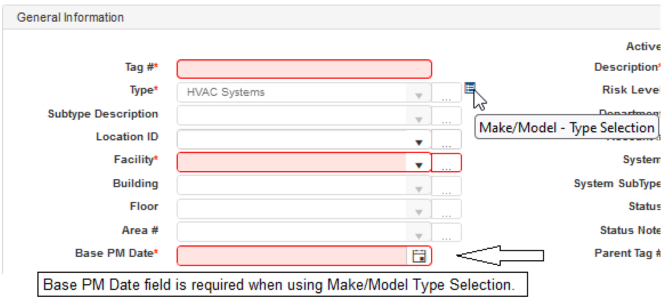
Summary: The *Bills of Materials* window has been enhanced with additional columns and the option to Sort and Filter each column.

Discussion:

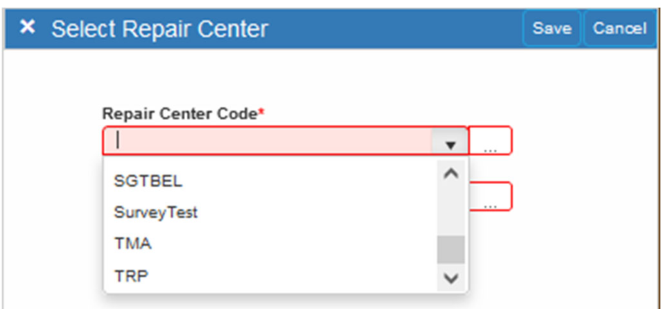
Look for the icons in the headings for the following columns:

- Code
- Name
- Created Date
- Modified Date
- Part Count
- Item Count
- Active

Equipment Record Design Change for Make/Model



Path: *Equipment > Records / Identity Tab*



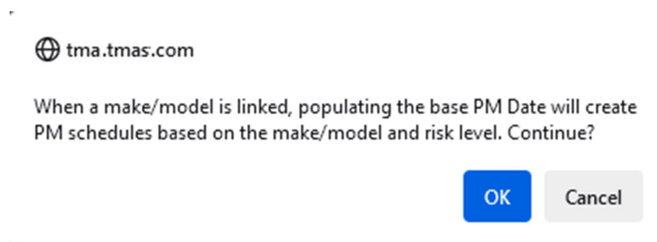
Summary: The workflow process on the *Equipment* window has been revised to move the *Base PM Date* field and add a *Select Repair Center* flyout.

Discussion:

The *Base PM Date* was in the *Dates* section. It is now in the *General Information* section.

When you select a Make/Model *Type*, the *Base PM Date* field becomes required if the Make/Model has PM schedules.

An entry in the *Base PM Date* field triggers the following alert:



When you click *OK* on the alert, the *Select Repair Center* flyout opens – if the record does not have any linked Repair Centers.

When you select and save a Repair Center on the flyout, the RC is added to the *Equipment / Repair Centers Tab*.

If the *Make/Model / PM* record has no RC, it defaults to the selected RC.

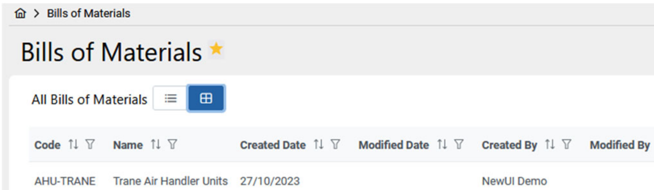
Audit History View Added for Direct Database Access

Summary: If you have purchased Direct Database Access, the Audit History View is now available.

Discussion:

This is a view to access when you build your own reports. It is available if your organization has purchased Direct Database Access.

Bill of Materials Includes Data Table View



Path: *Material > Bill of Materials*

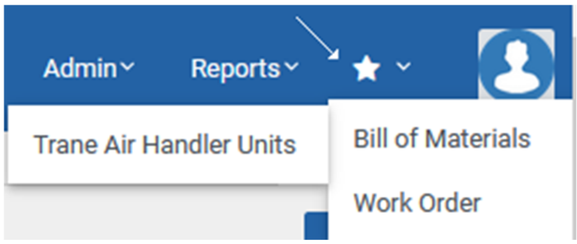
Summary: A new data table view has been added to the Bill of Materials window.

Discussion:

You now have the option to see the Bills of Materials as a list or a data table that includes more information about each BoM.

Click the icons above the list or table to switch from one view to another.

Favorites and Bookmarks Extended to New UI/UX



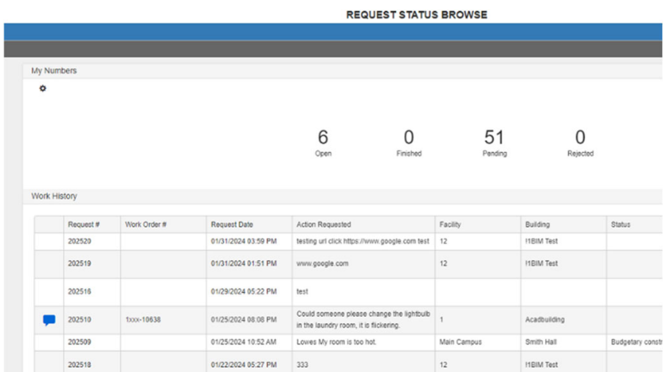
Summary: The Bookmark and Star icons are now available on the new UI/UX interface.

Discussion:

A Bookmark icon is available to mark individual UI/UX records.

The Star icon is visible on the UI/UX menu bar with a drop-down of Favorites and Bookmarks set throughout the application.

Requestor Login – Request Status Browse Rules Change



Summary: To avoid timeout issues, the *Accepted* and *Rejected* results on the *Request Status Browse* window are limited to the last 30 days. There are no restrictions on Pending results.

Discussion:

The work history grid now uses the following rules to determine the records that are displayed:

- **Pending** Requests - With no Accept date and no Reject date, all records are loaded regardless of creation date.
- **Rejected** Requests - Load all records that were rejected within the last 30 days.
- **Accepted** Requests - Load records for open work orders that were accepted within the last 30 days.
- **Accepted** Requests - Load records for work orders that were closed within the last 30 days.

January 23, 2024

Mass Import Templates Added

Path: *Admin > Mass Import > Dashboard*

Summary: Additional templates have been added to the Mass Import tool.

Discussion:

The following Templates are now available for import:

- Areas
- Buildings
- Floors
- Part Inventory

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

Full details about the module can be found at **Error! Reference source not found.** here.

January 9, 2024

Mass Import Templates for Assets and Parts

Path: *Admin > Mass Import > Dashboard*	Summary: Additional templates have been added to the Mass Import tool. Both Assets and Parts are now available for import. Discussion: The Mass Import module is available for System Administrators to import new data or update existing data. Full details about the module can be found at **Error! Reference source not found.** here.

CAD Import Department Codes Available

Path: *Admin > CAD Import*	Summary: Department Codes are now an option when using CAD Import. Discussion: Previously, Department Descriptions were available, but the Department Code was not an option. You can now import both Description and Code.