On-Prem Installer Release Notes

2024

This document contains Release Notes for v7

2024

TMA Systems, LLC

1876 Utica Square, Third Floor

Tulsa, OK 74114

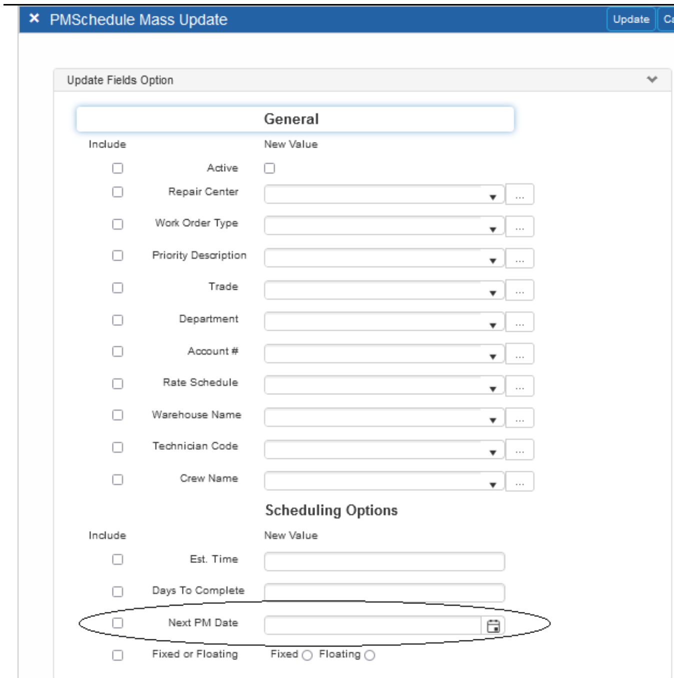
E-mail: support@tmasystems.com

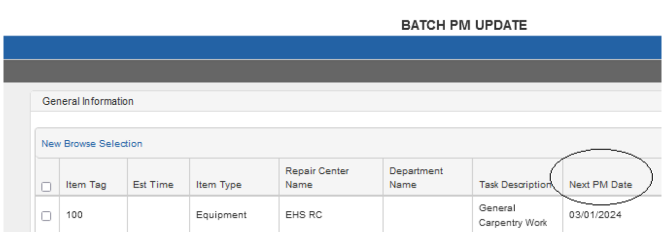
Phone: 918.858.6600

Contents

November 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:

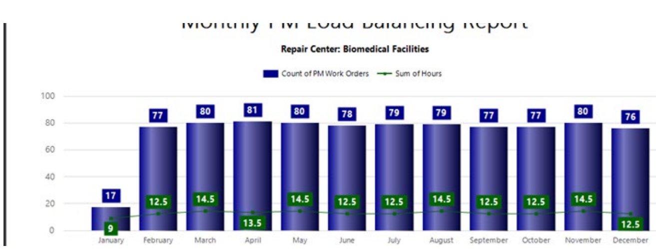
This addition makes it easy to mass update multiple PM schedules when a client needs to shift a batch to a different date.

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 a **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.

New PM Load Balancing Reports

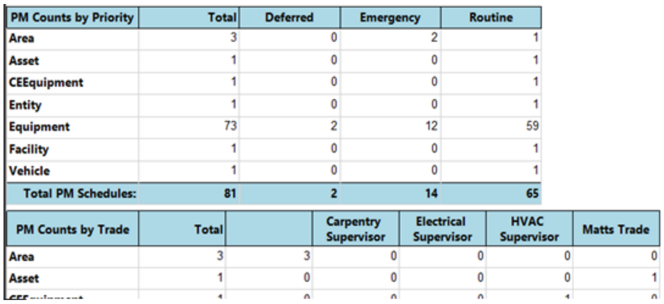


Summary: The PM Load Balance Report in WebTMA Report Manager is available to give you a view of your Preventive Maintenance program schedule throughout the year.

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



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

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 a **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.

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.

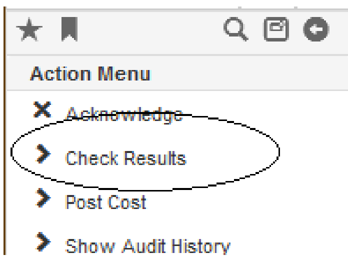
The process can also generate a *Check-in Task* from the Make/Model if it exists. If it is not part of a Make/Model record, the system looks to the Repair Center for the Check-in Task. If none is found, no Check-in Task is generated.

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



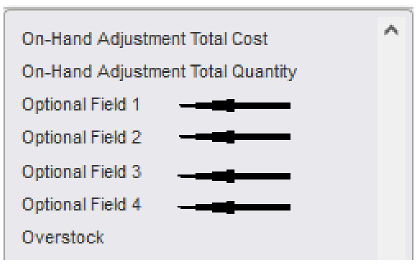
Path: *Work Order*

Summary: When Technicians log in to WebTMA using the Technician role, the *Work Order* window Action 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 Available in On-Hand Adjustments Report Form



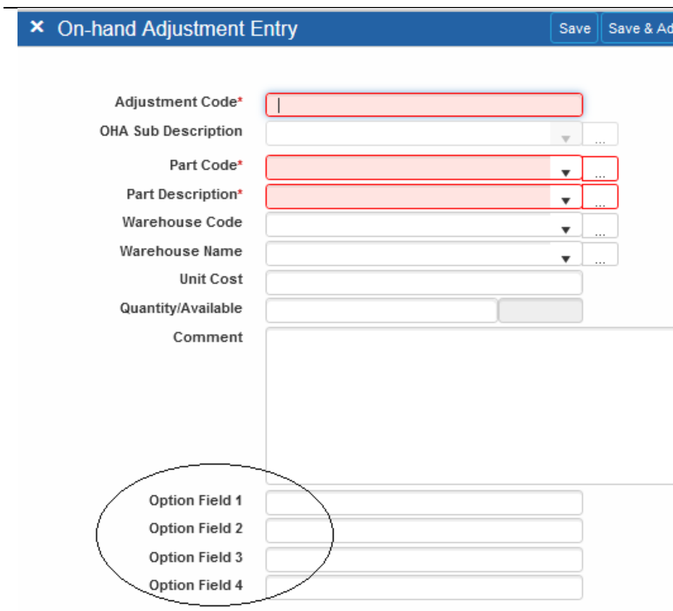
Path: *Reports > Report Writer*

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.

New Optional Fields for On-Hand Adjustment



Path: *Materials > On-Hand Adjustments*

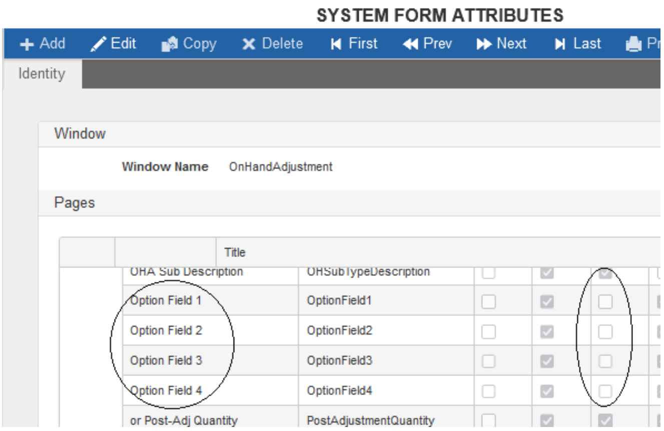
Summary: You now have the option to add as many as four different text fields to the *On-Hand Adjustment Entry* window to capture additional information about the inventory adjustment transaction (such as additional detail on why it is being made).

The fields are hidden by default.

Details:

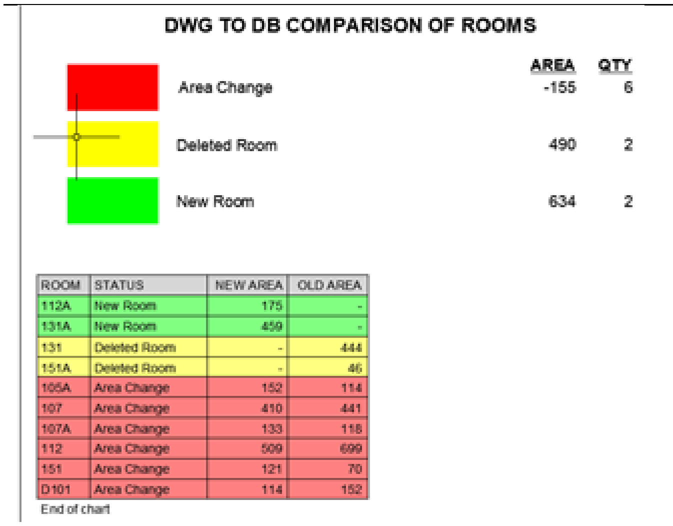
The fields are labeled *Option Field 1*, *Option Field 2*, etc. as illustrated at left but can be renamed using Text Management (*Admin > Text Management*). These fields are alpha-numeric with a limit of 255 characters.

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

Space Management Reject Pending Update Added



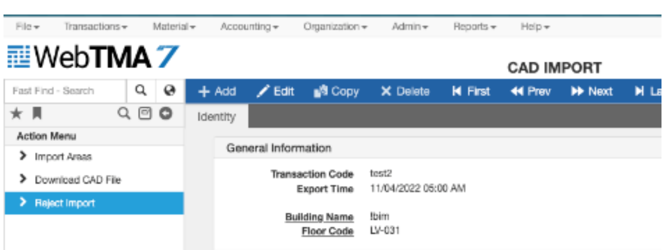
DWG TO DB COMPARISON OF ROOMS

	AREA	QTY
Area Change	-155	6
Deleted Room	490	2
New Room	634	2

ROOM	STATUS	NEW AREA	OLD AREA
112A	New Room	175	-
131A	New Room	459	-
131	Deleted Room	-	444
151A	Deleted Room	-	46
105A	Area Change	152	114
107	Area Change	410	441
107A	Area Change	133	118
112	Area Change	509	699
151	Area Change	121	70
D101	Area Change	114	152

End of chart

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)

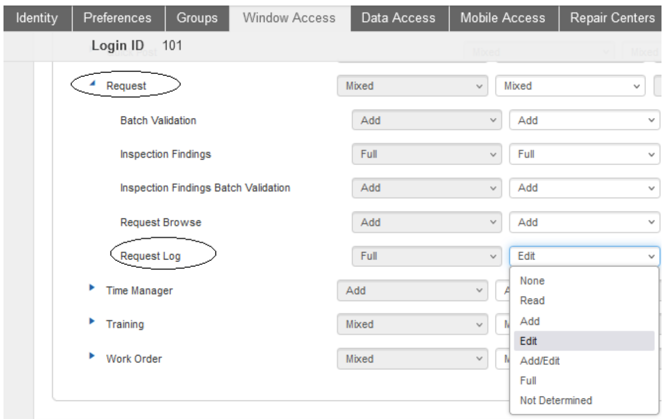
After the drawing updates are exported to WebTMA, they remain in a staging area for approval before committing the changes to the database.

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.

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.

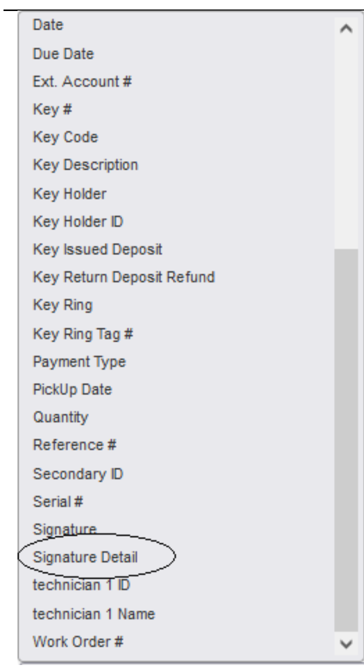
Details:

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 Ord
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.

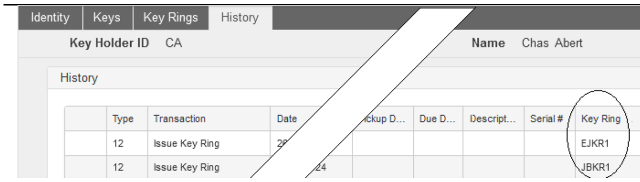
Details:

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



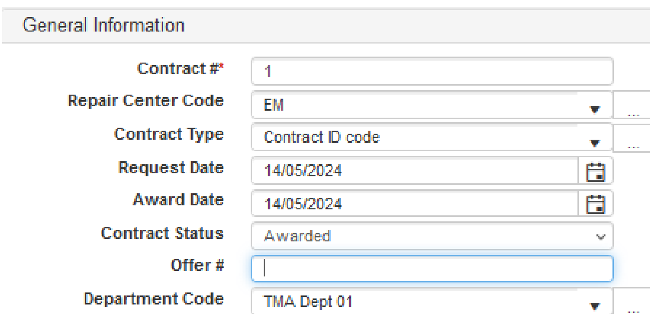
Path: *Material > Key Management > Key Holders / History Tab*

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



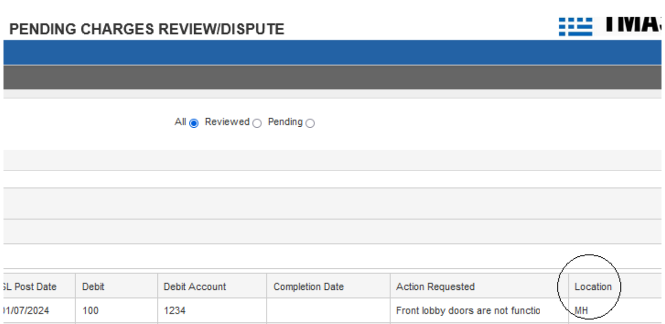
Path: *Organization > Contract > Records*

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*.

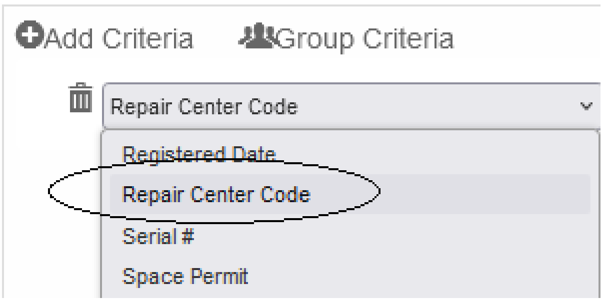
Details:

Previously, this column displayed the Location *Description*.

Criteria Added to Entity Window Selection

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*).

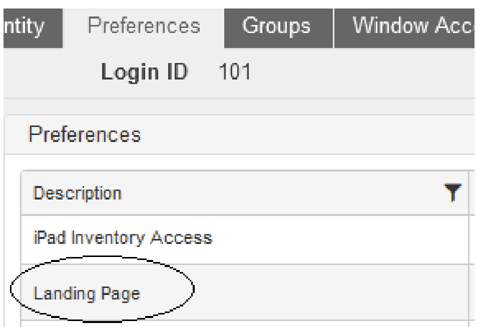
Details:



Path: *Organization > Entity*

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

Preference Label Change – Landing Page



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

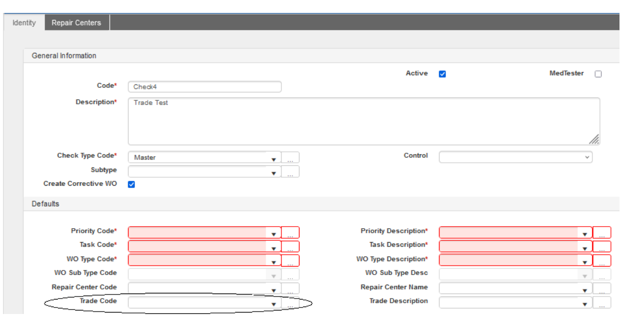
Path: *Admin > User Management > Groups / Preferences*

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.

Trade No Longer a Required Field for Master Check



Path: *Organization > Task > Master Check*

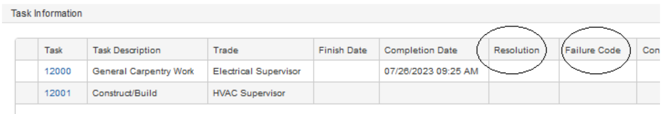
Summary: Clients who use the *Create Corrective WO* option on the *Master Check* window and who also use the *Client Info / Preference* to *Force a Trade for Each Task*, were unable to change the Trade on the corrective Work Order.

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*.

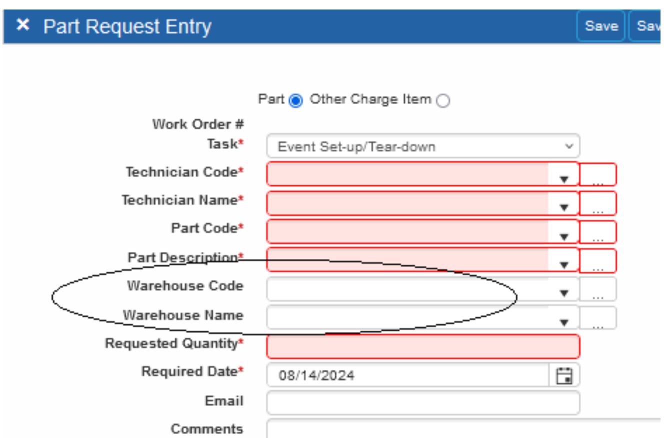
Details:

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*



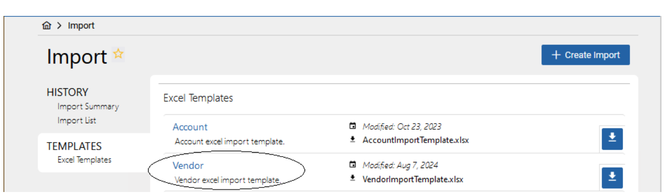
Summary: Adding Requested Parts to an existing Work Order has been simplified. Just select *Add Requested Part* on the WO Action Menu to open the *Part Request Entry flyout* with one click. When selecting the Part, you can also choose the Warehouse where the Part is stocked.

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:

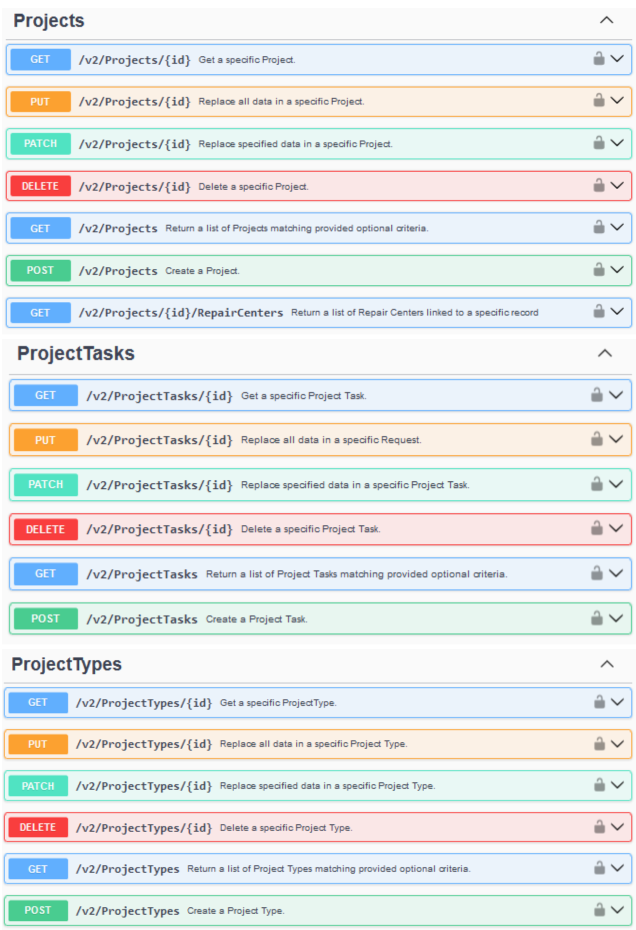
You can import Manufacturers, Contractors, and Vendors using this Template, which can be useful in several ways. For example, when you build a new distribution center or add another campus. In some cases, our clients have separate Departments like Facilities and Housing. If these are merged, you can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

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.

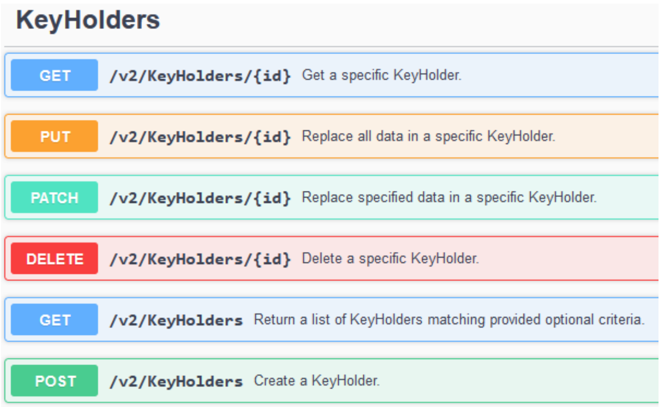
These new APIs are fully described in our Swagger documentation.

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

Path: *Admin > User Management > Requestors*

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

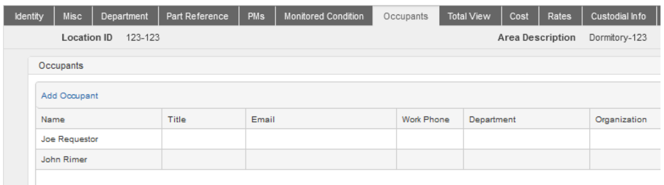
Summary: A new criteria field selection is available on the drop-down selection list for the *Contract* window using Advanced Find (*Show the Search Panel*).

Details:

Look for *Contract Type* to facilitate your search.

September 2024

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.

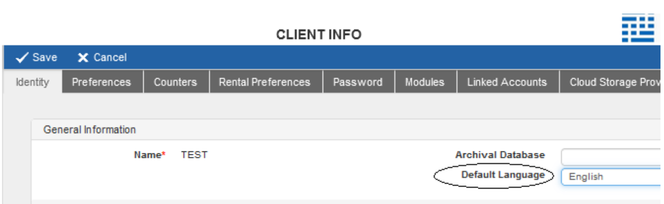
Details:

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

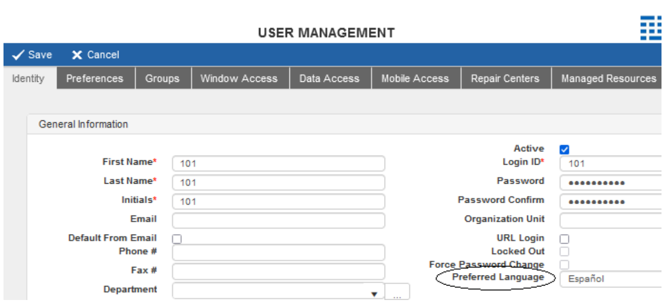
It is still true that when a Location is assigned from the Requestor record, the Requestor is automatically added to the *Areas / Occupants* Tab.

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.).

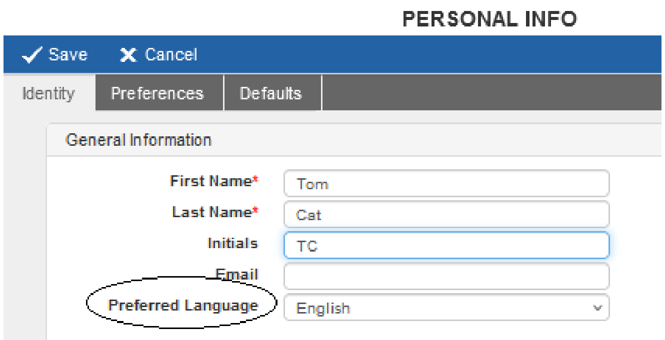
Details:

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:

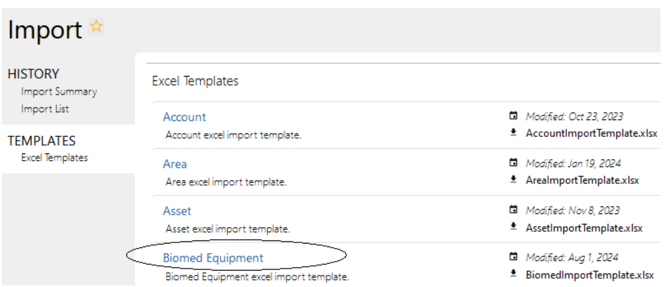
- English
- German
- Spanish
- Thai
- French (France)
- French (Canada)



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*

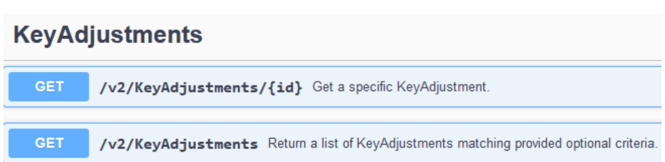
Summary: The Mass Import Template for Biomed Equipment has new columns. This increases the number of fields available for import.

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

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

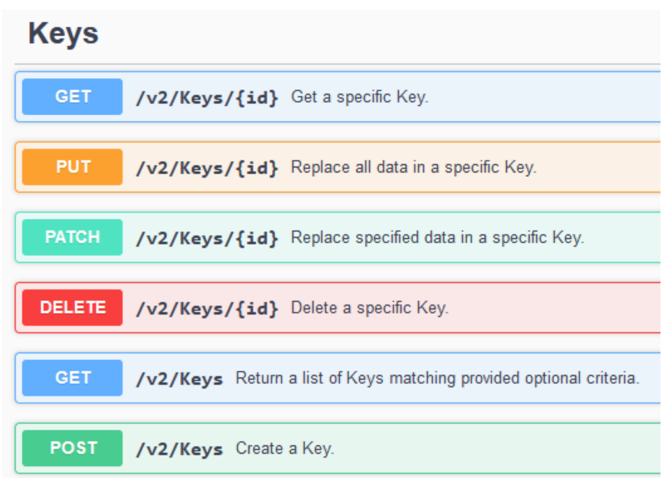
The Key Adjustments API facilitates the management of key assignments and inventories. This is crucial for operational security and efficiency.

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:

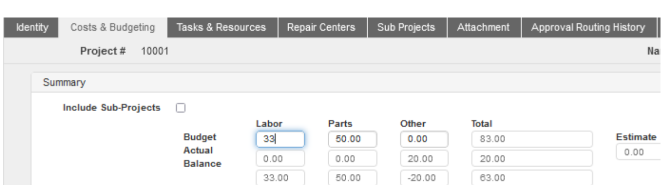
The endpoints now map to CREATE (POST), UPDATE (PUT and PATCH), DELETE, LIST (GET with no ID), READ (GET with ID).

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.

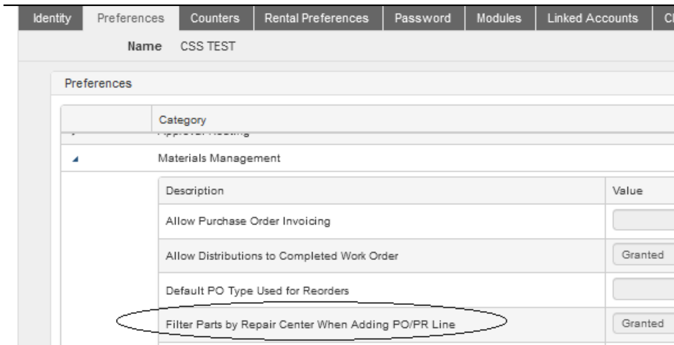
Details:

The following rules apply:

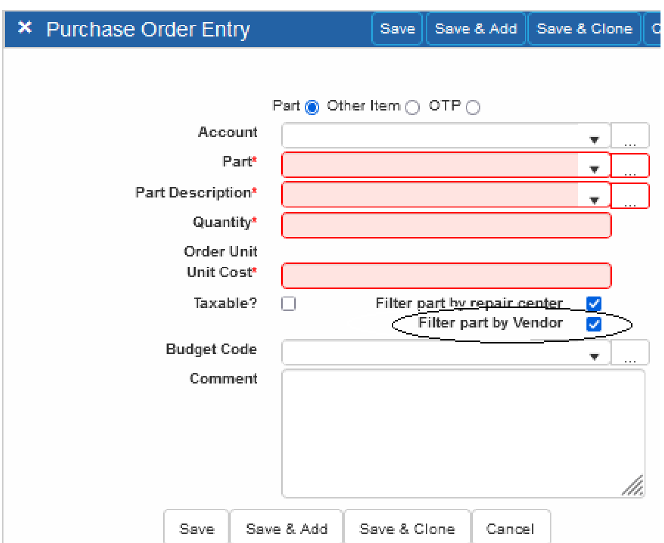
- If an estimate is attached and authorization is **not** required, you **can edit** the budget lines.

- 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.

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.

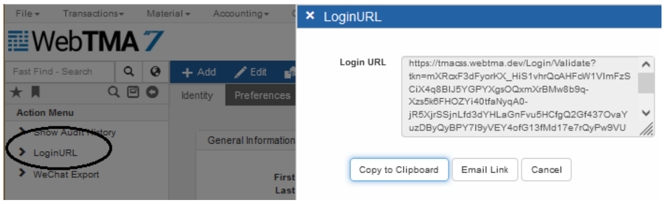
Associate parts to the vendor(s) where they will be purchased by navigating to the PR or PO windows and choosing the *Vendor Code*.

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.

Login URL with Enhanced Security

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.



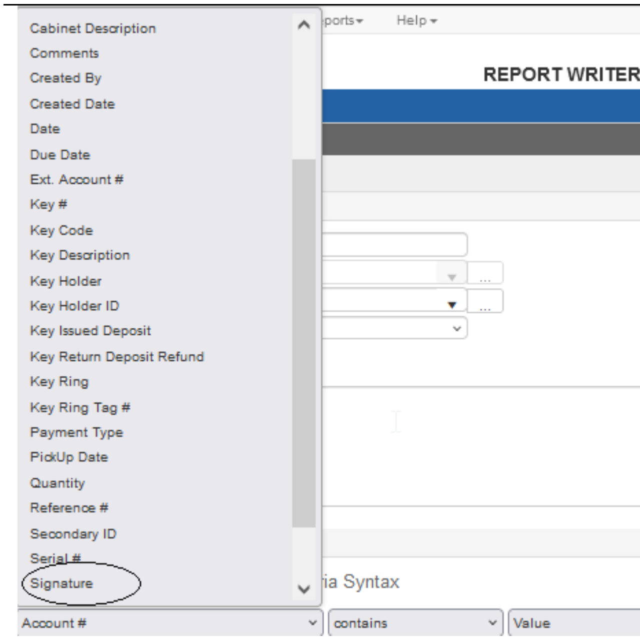
Path: *Admin > User Management > Records*

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.

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:

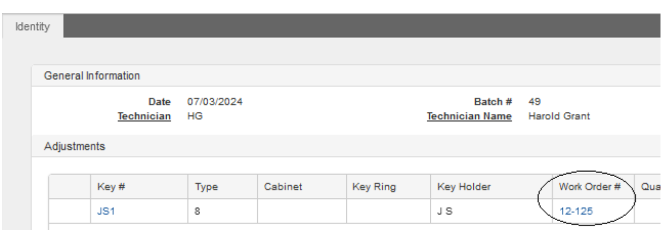
The selection is available for the following report forms:

- 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.

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.

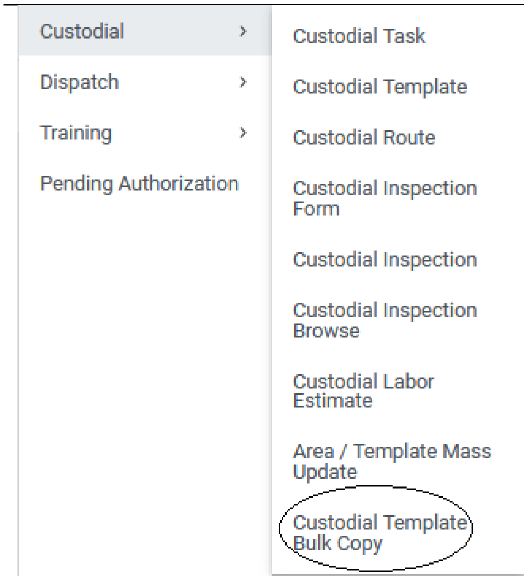
The *Key Adjustments* window is used for transactions regarding Keys such as creating, issuing, and returning Keys.

Details:

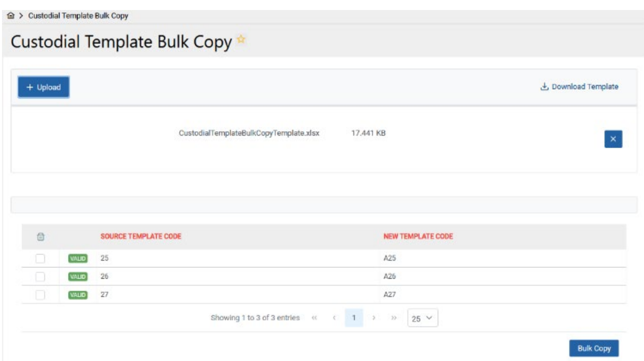
For ease of returning to a Work Order to make relevant updates, Key Adjustments records that include a Work Order number are now linked to the related Work Orders.

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

Custodial Template Bulk Copy Window Added



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



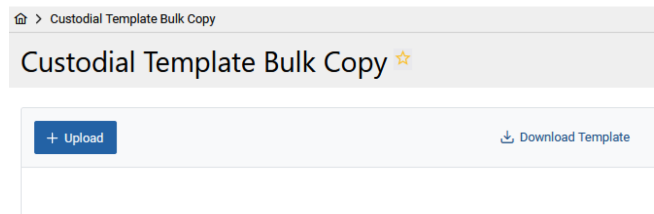
Path: *Transactions > Custodial > Custodial Template Bulk Copy*

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.

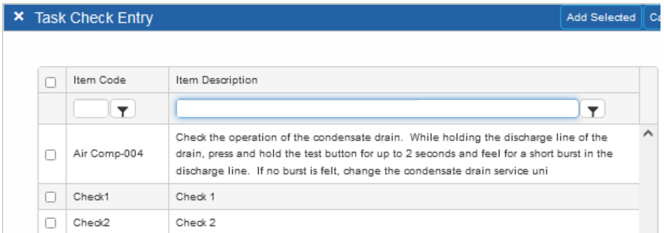
If all entries are valid, click the *Bulk Copy* button at the lower right of the window.

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.

Search Option Added to Task Check List Flyout

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.



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

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

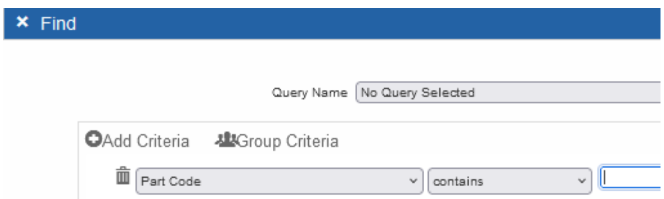
Once you have created the check list selections, they are available for selection from the *Task* Check *List* Tab).

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.

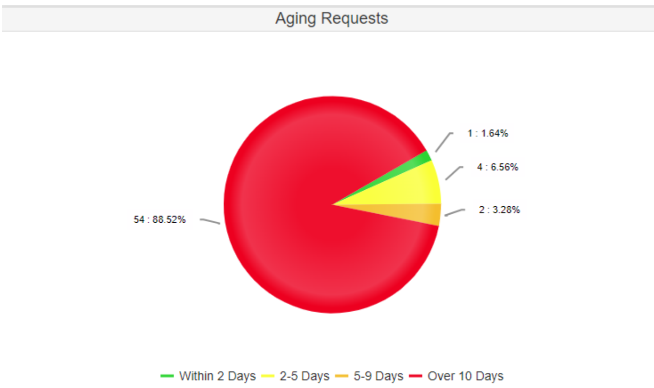
Details:

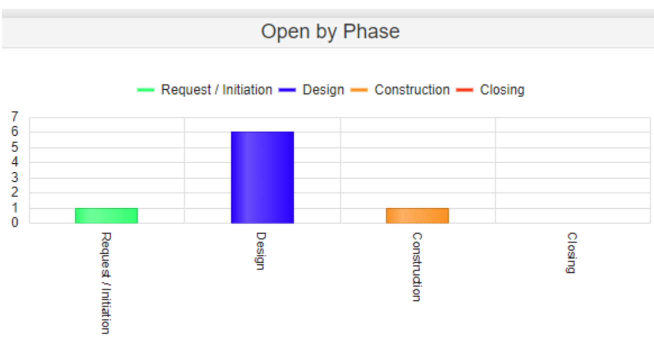
On the *Purchase Requisitions* window, choose the *Show Search Panel* icon from the Navigation Panel.

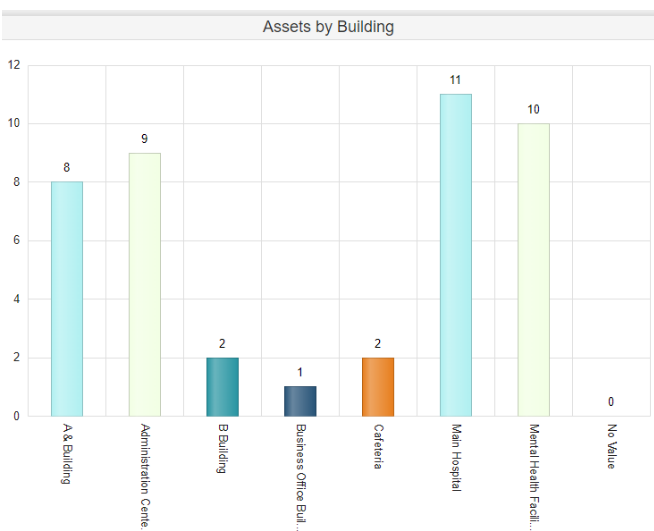
Select *Part Code* as a criterion on the *Find* flyout and enter the full or partial OTP number to see the Purchase Requisitions that include the related OTP records.

July 2024

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:

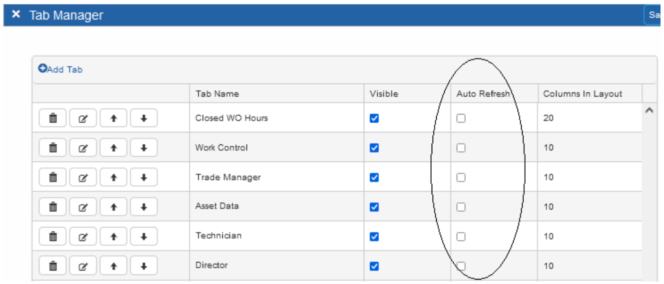
Responsive Content. The contents grow or shrink with the size of the box and are centered within the box. Previously, the font was difficult to read because of the smaller size, and it had too much unused white space.

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.



Action Menu: *Manage Tabs – Auto Refresh* Column

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.

Alert Based Work Orders with Smart Building Integration

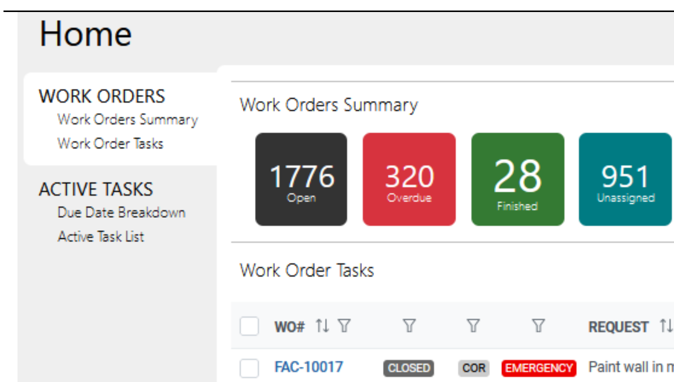
Summary: WebTMA 7 now integrates with BACnet to communicate with Building Automation Systems (BAS) or Business Management Systems (BMS).

The Smart Building Integration additional module is required to utilize 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.

Landing Page Revision



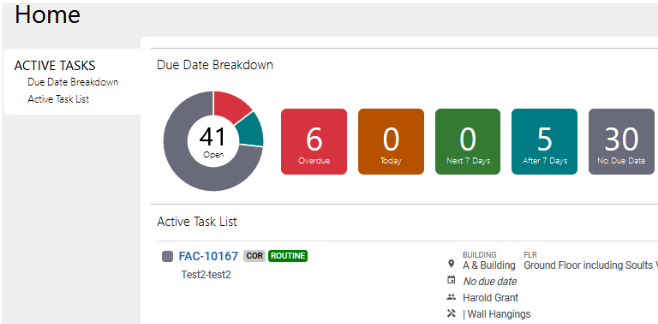
Supervisor's View

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 Technicians marked as *Supervisor* and selected as Supervisor for a Trade or Trades will see the *Work Orders* Tab.

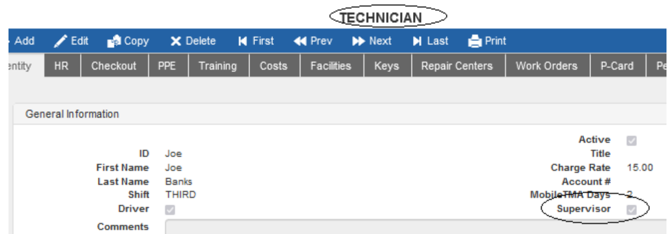
The change makes it faster for logged-in Technicians to see their Tasks without using extra clicks and ensures they do not have access to mass update functionality.

Details:

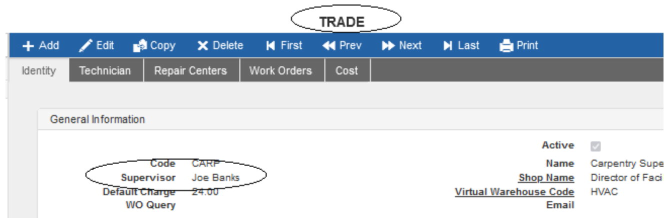
If the logged-in user has the *Supervisor* check box marked on their *Organization > Repair Centers > Technician* record, the *Work Orders* Tab is visible.



Non-supervisor's View

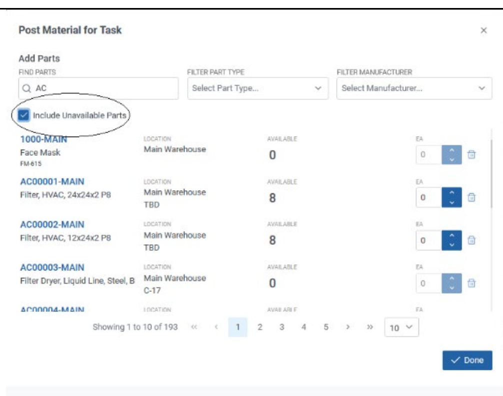


The work orders that display on the landing page are limited to Trades that the logged-in supervisor manages as designated from the *Organization > Repair Centers > Trade* record.



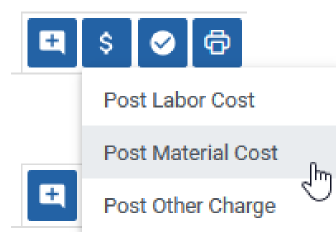
If the Supervisor wants to assign work from the Landing Page, they must have the assigned Privileges "Allow to schedule work to others" found in *Admin > User Management > Records / Preferences* Tab.

Parts Available List Refined for Landing Page



Default View – Include 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.



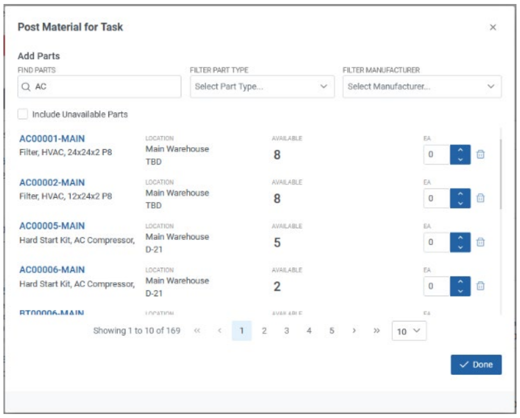
The selection list that displays when you click the + *Add Part* button now offers an option to remove from view the parts that have an available count of 0.

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.



No Unavailable Parts

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

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.

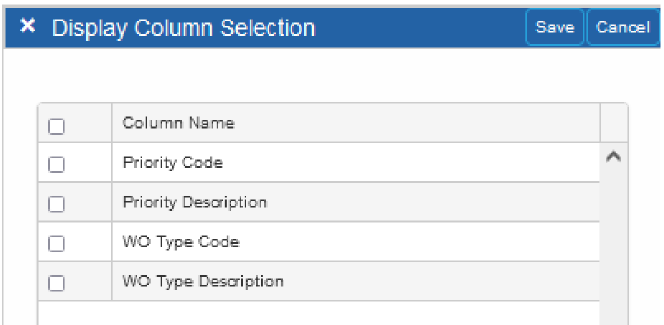
- One of the combinations below is needed. If Manufacturer, Model, *and* Equipment Type are present in the template, then the lookup for the Equipment Make/Model is based on Manufacturer and Model.

  - Make, Manufacturer, and Model

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

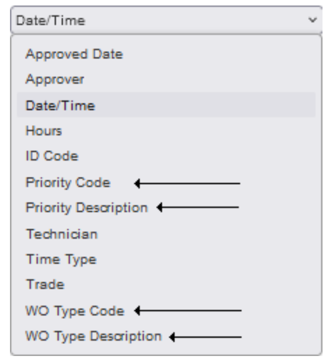
- Base PM Date
- Trade (if M/M PM schedule does not have a Trade, the Trade from the template is used)
- Repair Center

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*.



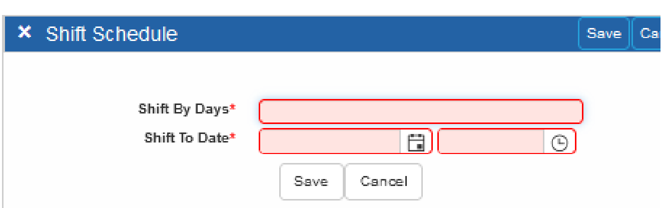
Details:

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'.

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.

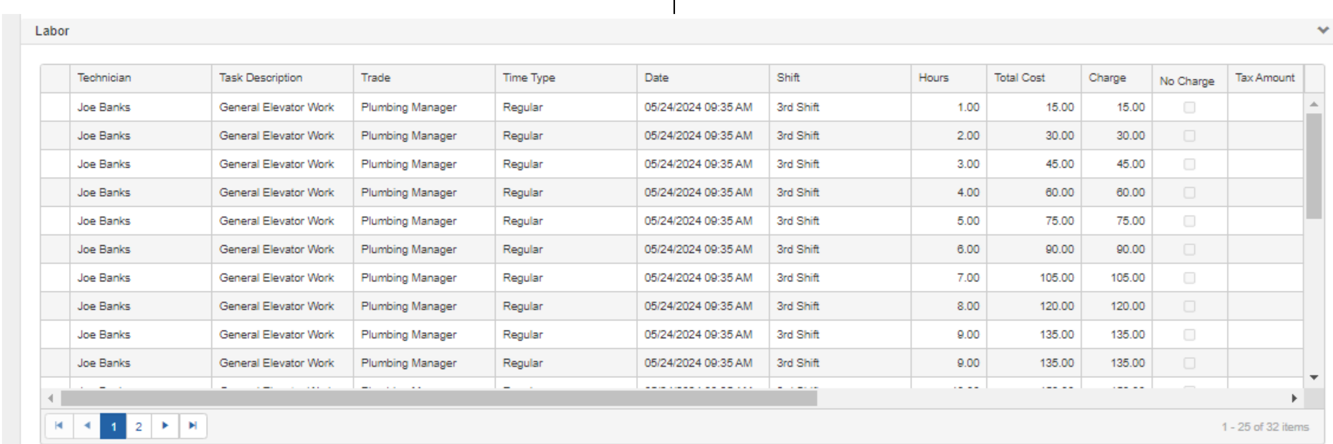
Details:

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

Task Code Character Length Increased

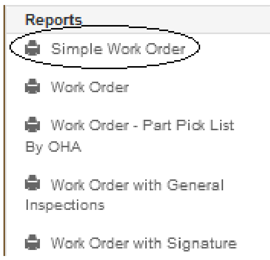
Path: *Organization > Task > Records*

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.

New Simple Work Order Format



Path: *Transactions > Work Order > Records*

Summary: Several clients asked for a simplified Work Order that could print/render more quickly from the *Work Order* window. You now have the option of a Simple Work Order or the original Work Order available in the Reports panel**.**

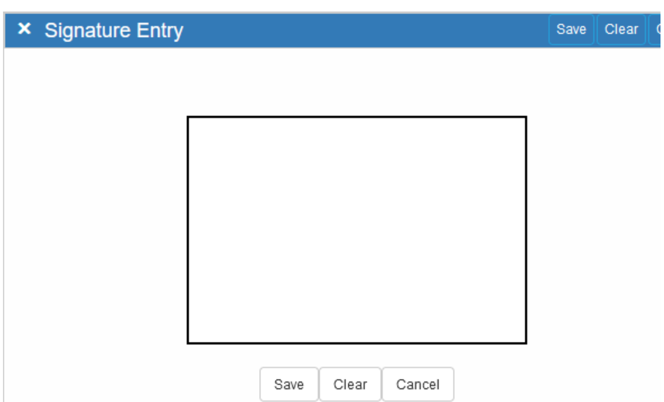
Details:

The new simplified Work Order layout is easier to read for basic work orders. Also, it is optimized to render more quickly. The new report is named *Simple Work Order*.

It has a significantly reduced number of fields on the printout to show only the most relevant information. It is designed with Technicians in mind who print Work Orders. The report allows space for handwritten notes, hours, comments, signatures, etc. The system renders the printout in one (1) second compared to five (5) seconds for the original work order printout.

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: We have added the ability to capture physical signatures to several windows in the application.

Details:

This 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**.

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.

Work Request API

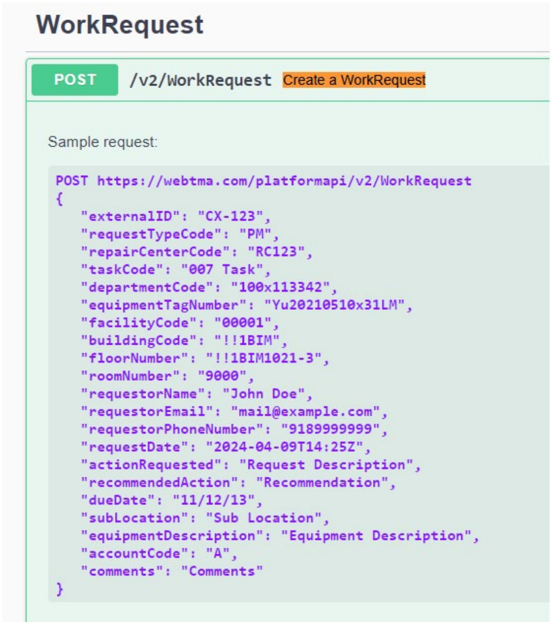
Summary: A new, easier to use, Work Request API has been added to our API suite. This API is designed to accept system codes rather than database ID's for most of the lookup fields available for the creation of a Work Request (Service Request). The current Work Request API requires multiple API calls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

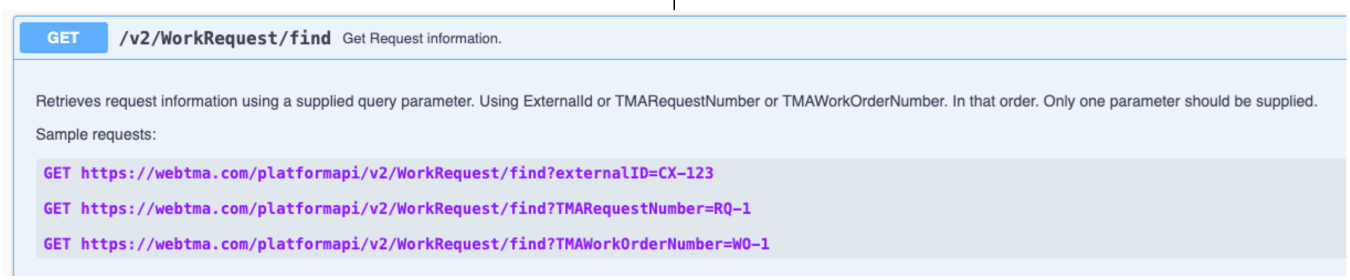
The new API option allows clients to pass the system visible codes instead of the database ID. This is a new API (additive) and will not replace the existing API (Requests). Any client using the current Requests API can continue to use that API as is.

Details:

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

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).

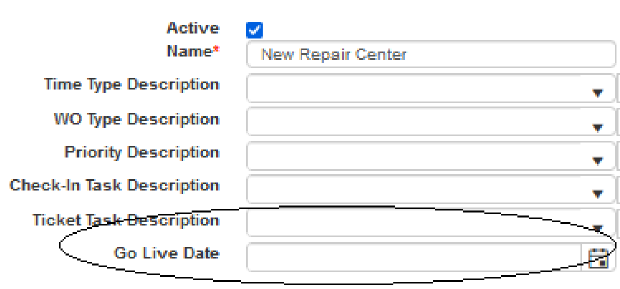




Go Live Date for New Repair Centers

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.



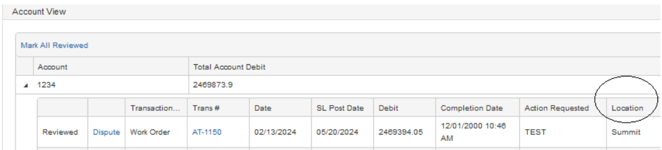
Path: *Organization > Repair Center > Record / Identity Tab*

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.

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.

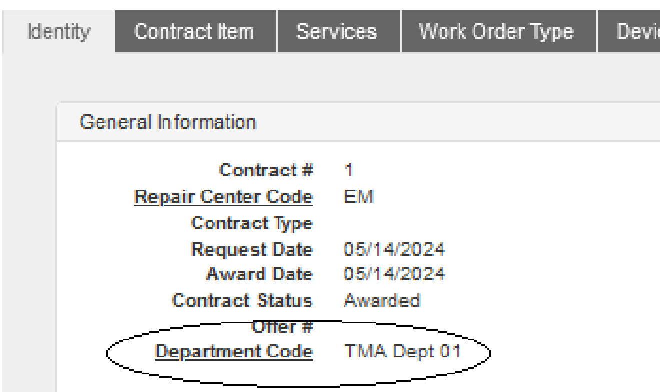
The Sub-Ledger Browse form now has an additional column.

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



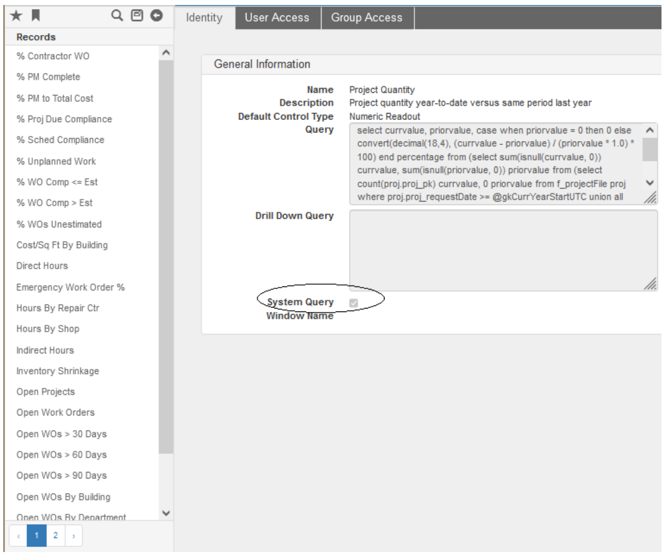
Path: *Organization > Contract > Records / Identity Tab*

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.

Custom SQL Window Added



Path: *Admin > Custom SQL*

Summary: WebTMA v7 now includes the *Custom SQL* window. Use Custom SQL to copy standard System Queries or write and test your own SQL queries for the Executive Dashboard.

In use, your users can view a data set represented on a graph, such as the data for a segment of a pie chart. By applying a drill-down query, you can click on a section and display a list of the underlying data in tabular format.

Details:

To enable the custom SQL window for your on-premise environment, click here.

Once custom SQL is enabled for your site, a new custom SQL can be created by going to *Admin > Custom SQL* and copying an existing or adding a new Custom SQL following the rules outlined here.

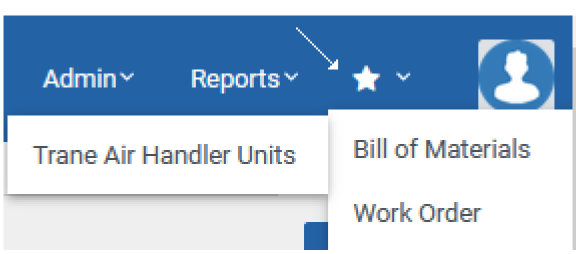
Your custom queries have several restrictions to protect you from malicious users that have SQL skills, for example, the term 'exec' is on the list of unacceptable keywords. The term will be screened out of any query and result in an error. In addition, all queries must start with SELECT and must be tested. If you have not clicked the *Test Query* button, an alert reminds you.

Queries are listed in the Records section of the Navigation pane.

System queries are identified by a mark in the System Query check box below the Drill Down Query field. System queries cannot be edited.

Full details about Custom SQL are available here.

Favorites and Bookmarks Extended to New UI/UX



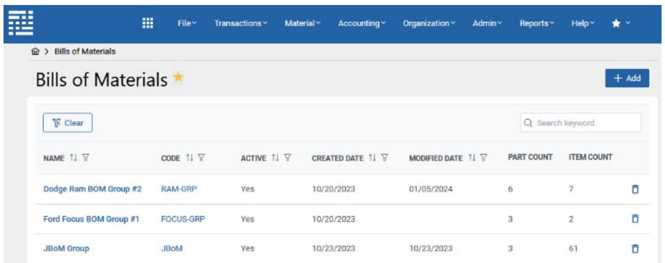
Summary: As WebTMA continues to make the user interface easier to use, the Bookmark and Star icons are now available on the New UI/UX interface.

Details:

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

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

Bill of Materials New Columns in Table View



Path: *Material > Bill of Materials*

Summary: The *Bills of Materials* window is an easy way to associate needed Parts with many items at one time. The Table View has been revised to replace certain columns and add new columns for more information. You also have the option to Sort and Filter each column.

Details:

Look for the ↑↓ ▽ icons in the headings for the following columns:

- Code
- Name
- Created Date
- Modified Date
- Part Count (new)
- Item Count (new)
- Active (new)

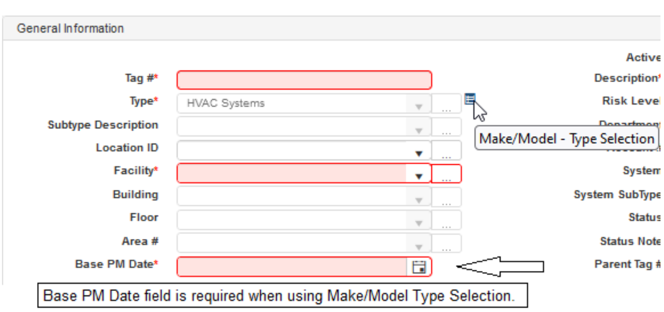
Audit History View Added

Summary: The Audit History View is now available to help simplify your reporting process.

Details:

This is a view to access when you build your own reports using the report writer application of your choice.

Equipment Record Design Change for Make/Model

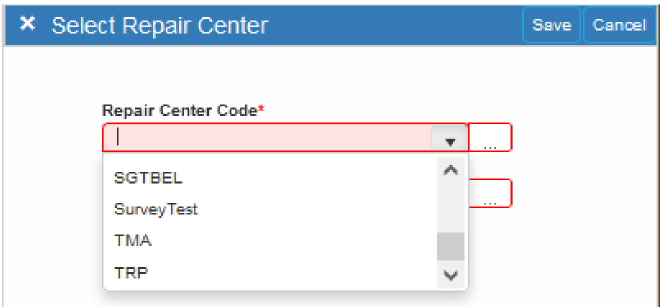


Path: *Equipment > Records / Identity Tab*

Summary: The Make/Model feature in WebTMA allows clients to create templates for equipment management. This allows for more efficient standardization of PM schedules, parts list, costing, life expectancy, SOPs, and documentation.

The workflow process on the *Equipment* window has been revised for ease of use in assigning Make/Model and creating PM schedules. The *Base PM Date* field has been moved, and a *Select Repair Center* flyout has been added. You can now make all these selections from the *Equipment / Identity* Tab.

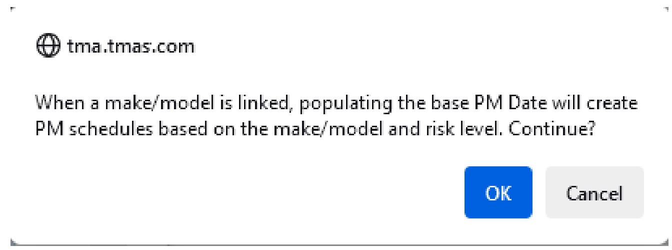
Details:



Previously, 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:

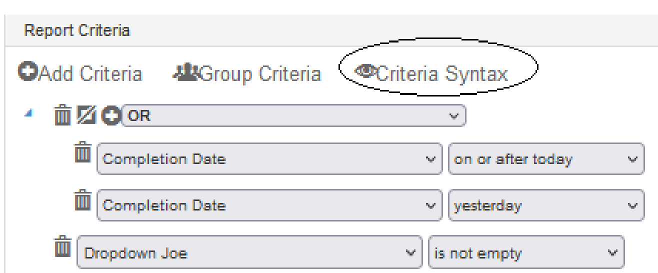


If the record does not have any linked Repair Centers, click *OK* on the alert to open the *Select Repair Center* flyout.

When you choose 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.

Report Writer – Report Criteria Syntax Link Added



Path: *Reports* > *Report Writer / Identity Tab*

Summary: You now have a way to confirm that you have structured your query accurately to achieve the desired results. When you add Report Criteria to your report, you can click a link to display the Syntax of your criteria.

Details:

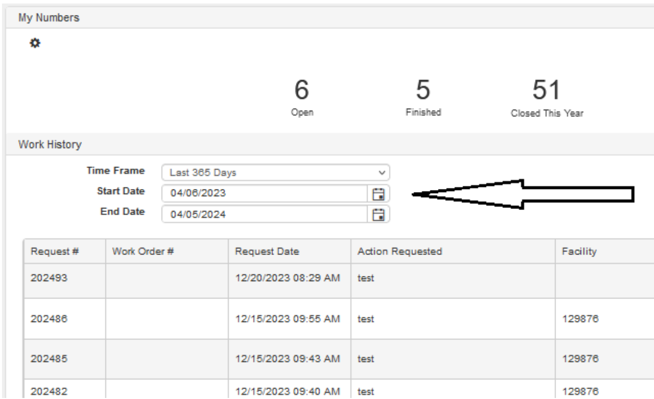
The *Criteria Syntax* link is available in *View*, *Add*, or *Edit* mode.

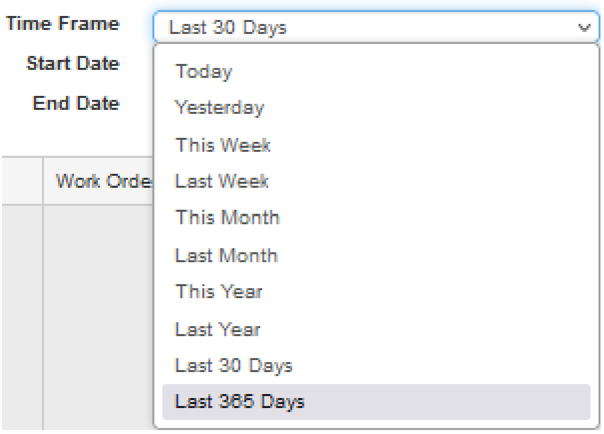
Click the link to open the *Criteria Syntax* flyout to see the syntax.

Requestor Login – Request Status Browse Date Range Added

Summary: You now have a way to select the time frame of records you want to see in Requestor Login Status Browse. Before this change, the system could time out while it attempted to load all records. The *Work History* grid now includes fields to set the time frame for viewing and reporting.

Details:





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

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. Oracle databases expect the 24-hour format illustrated below.

Details:

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)`

Mass Import Template for Fuel & Oil

Path: *Admin > Mass Import > Dashboard*

Summary: In ongoing support for our Mass Import tool, another template has been added: Fuel & Oil.

Details:

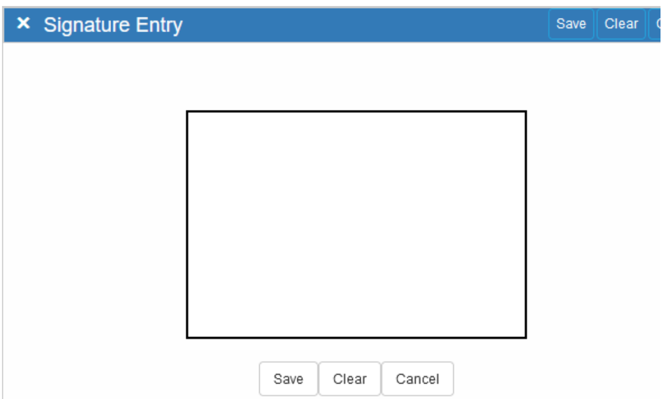
Fields found on the *Fuel & Oil* window are available for completion on the Excel spreadsheet, including

Meter and *Odometer* entries. Six fields, such as Ticket # and item Tag # are required.

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 on page 35.

Signatures Added to Key Adjustments



Path: *Material > Key Management > Key Adjustments*

Summary: Signatures can be used to capture a physical signature in an electronic format when you issue keys. With a signature, users acknowledge their key-holder responsibilities specified by your organization. In this release, you have the option to add a hand-written signature to Key Adjustment transactions.

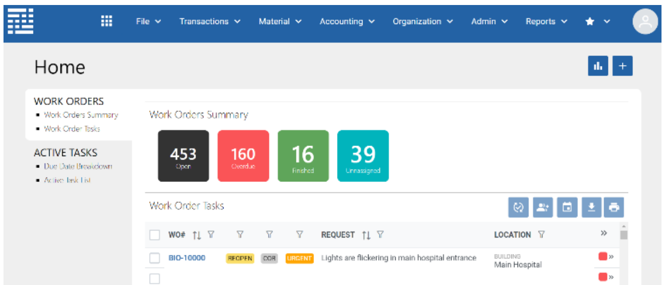
Other modules that qualify for signatures will be available in the next release.

Details:

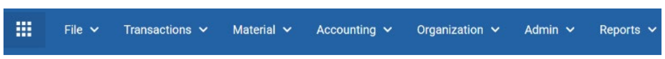
The signature can only be added in *Add* mode and cannot be edited or altered.

For a Key Adjustment that qualifies, use the  *Signature* button for each line item or *Signature* on the Action menu.

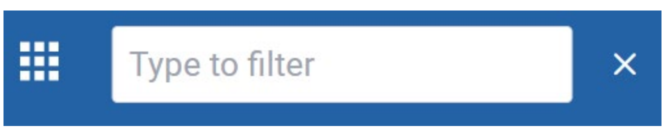
New Home Page User Interface (UI)



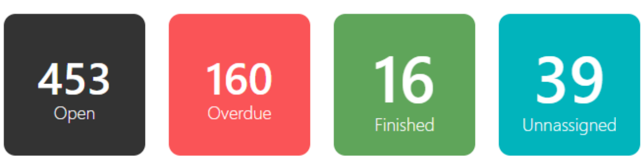
New Home Page – Default View



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.

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) 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

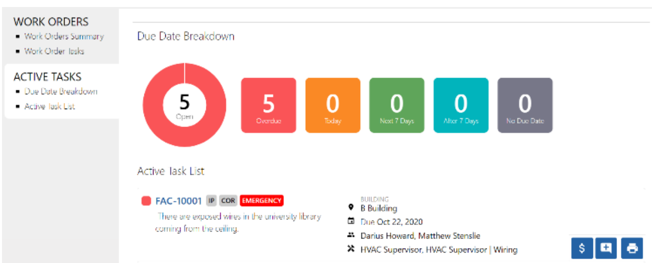
Select any of the buttons to display only those items in the *Active Task List* below.

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

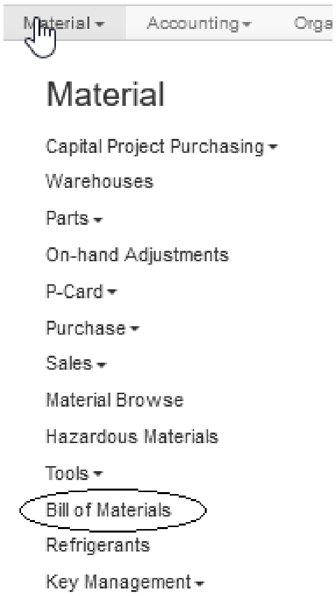


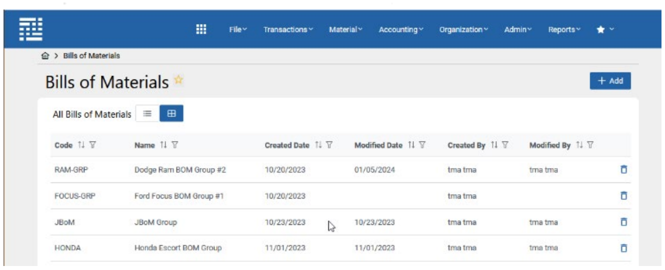
Active Tasks View

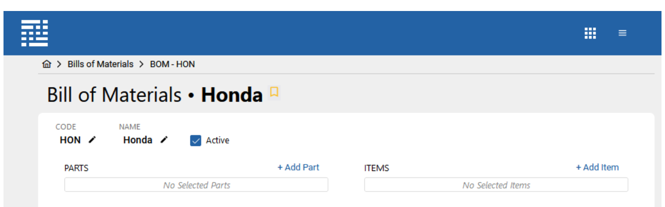
Bill of Materials Added

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

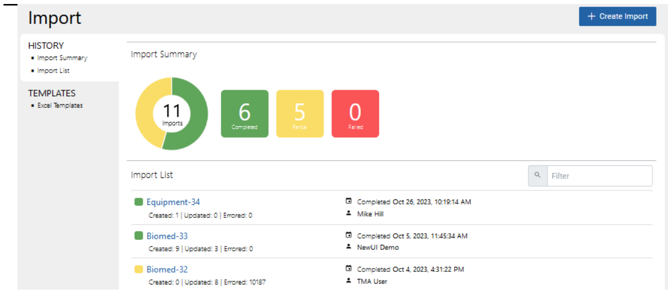
The *Parts / XRef* window also includes a *BoM Group Items* section.

Mass Import Module

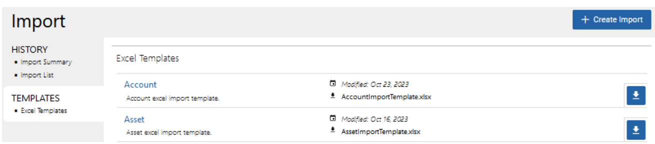
Summary: The Mass Import module is available for System Administrators to import new data or update existing data.

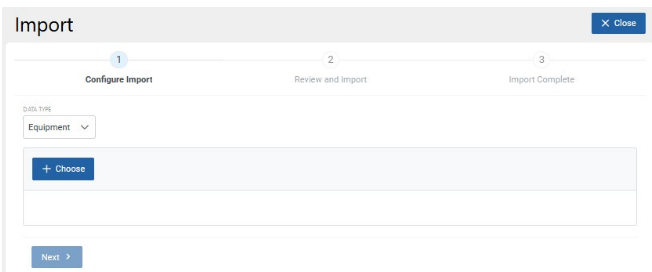
The new menu options are available on the Admin menu. Go to *Admin > User Management > Records / Window Access* to give your administrative user Full access to the new window.

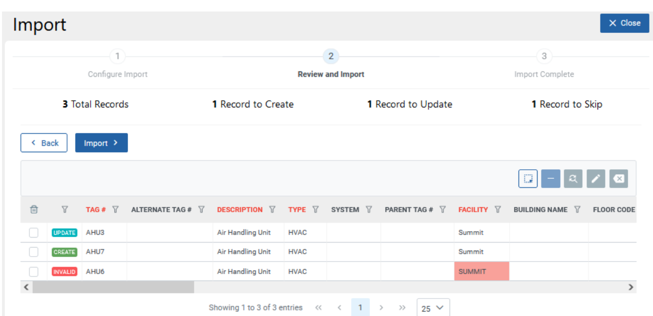
Mass Import Module

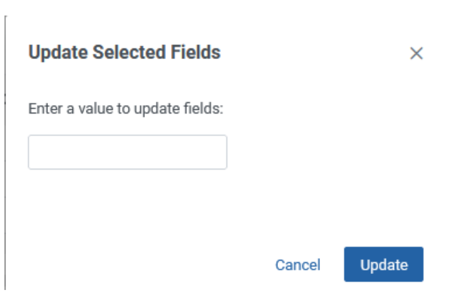


Path: *Admin > Mass Import > Dashboard*







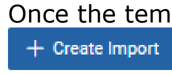


Discussion:

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

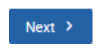
The *Templates* tab shows a list of the available Excel Templates you can download and complete before importing. The list of Templates will increase in the future.

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.

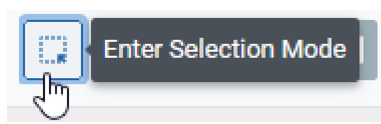
Click the 

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:

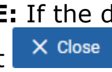


This enables the other buttons:

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 importing, revise the Excel spreadsheet, and try again.

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.