On-Prem Installer Release Notes

November 2025

This document contains Release Notes for v7

November 2025

TMA Systems, LLC

1876 Utica Square, Third Floor

Tulsa, OK 74114

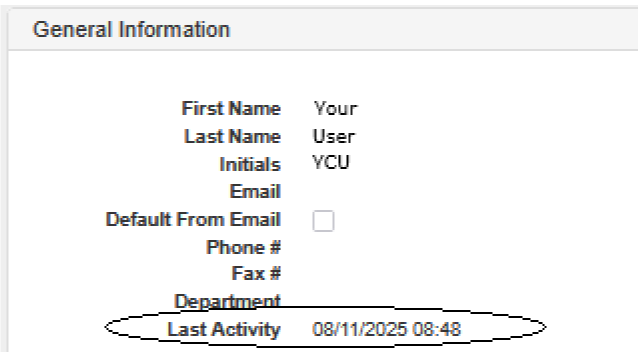
E-mail: support@tmasystems.com

Phone: 918.858.6600

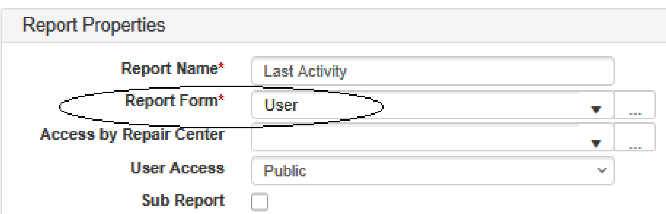
Contents

November 2025

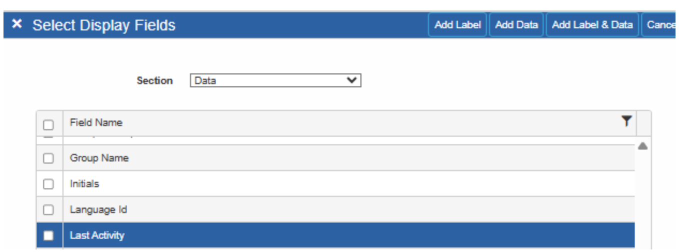
Last Activity Added to User Record



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



Path: *Reports > Report Writer / Identity Tab*



Path: *Reports > Report Writer / Layout Tab – Add Field*

Summary: The *User / Identity* Tab now includes a *Last Activity* field to show the last time the user was active in the system.

Previously, you had to search through the Session Logs for this information.

Details:

If someone logs in at 8:00 and works continuously until 11:10, the *Last Activity* field shows 11:10. This is the same information found in the Session Log.

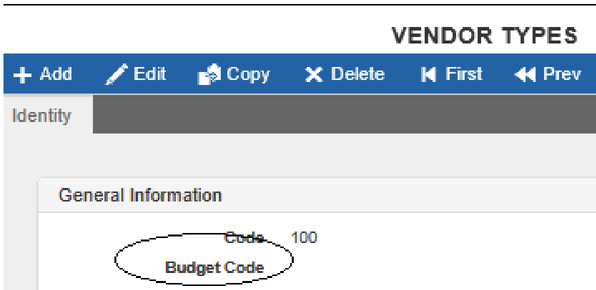
The date is tracked whether the login was to the main application or the WebTMA Mobile application (not WebTMA GO or mobileTMA GO).

This view is also available for Direct Database Connect, writing queries within the application, and report development.

For example, you can create a report in Report Writer to see who is using the system and who is not. Use the *Report Form* for *User* to list all active users in your system with the last activity date for each user.

This is the August Voice of the Customer enhancement. We would like to thank Graham Houser at the University of Illinois-Urbana/Champaign for submitting this suggestion. Many clients also voted for this in the UC25 Election for direction. We saw an opportunity to redevelop the feature to be more user-friendly. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

UFI Budget Codes for Contractors



Path: *Organization > Lookups > Vendor Types*

Summary: A new *Budget Code* field on the *Vendor Types* window applies to Credit Account Codes for Contractors. This relates to the UFI module.

The Budget Code only affects Work Orders where a Contractor performed the work and there are Contractor Costs.

Details:

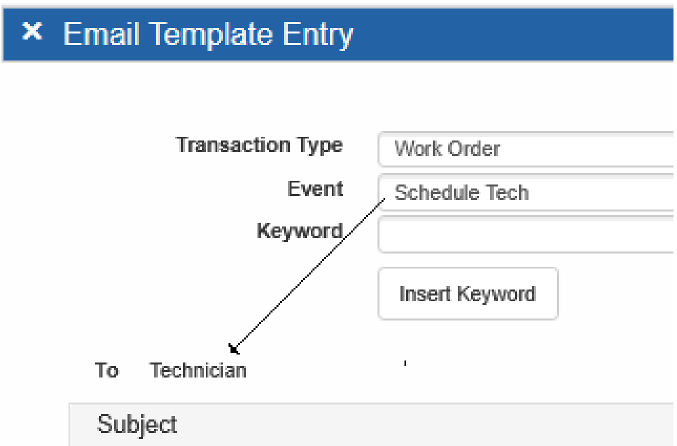
When Work Orders are closed and posted for a Contractor with a *Vendor Type* that has a Budget

Code, the charges are shown as credits when exported from UFI.

If the *Contractor Type* record does not have an assigned *Budget Code*, no Vendor Credits are exported. The related cell on the exported data file is empty.

As before, Debit charges look to the *Budget Code* for the Task used on the Work Order. These are set in *Lookups > Task Types*.

Email Template Enhanced



Path: *Admin > Email Settings*

Path: *Organization > Repair Center > Records / Email Settings*

Summary: The *Email Template Entry* flyout has been enhanced to show the general recipient of the email.

Details:

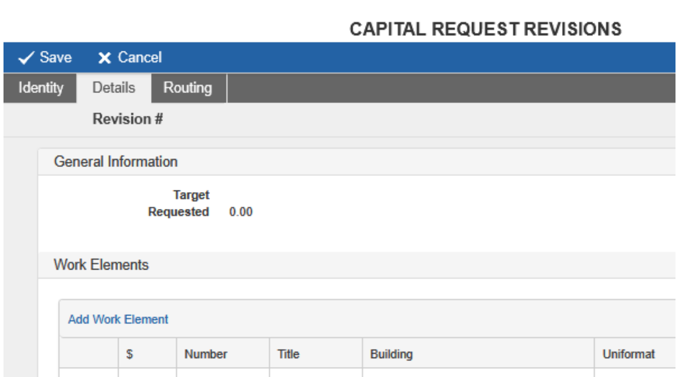
The new *To* field is read-only and changes based on the contents of the *Transaction Type* and *Event* fields.

In the example, when the *Transaction Type* is Work Order and the *Event* is Schedule Tech, the *To* field indicates the message will be sent to a Technician.

Other combinations follow these rules:

- If the Transaction Type is Approval Routing, show **Authorizer**.
- If the Transaction Type is Survey Response, show **Notification Recipients**.
- If the Transaction Type is Work Order and the Event is Schedule Tech, show **Technician**.
- If the Transaction Type is Work Order and the Event is Schedule Trade, show **Trade**.
- For other combinations, display **Requestor**.

Capital Request Revisions Updated



Path: *Transactions > Capital Requests > Capital Request Revisions*

Summary: The *Capital Request Revisions* window now automatically populates the Work Elements on the *Details* Tab.

Details:

When you add a new Capital Revision record and select the *Capital Request* on the *Identity* Tab, all Work Elements associated with that Request are automatically loaded into the grid on the *Details* Tab.

Funding can be edited from the *Details* Tab.

You can add new Work Elements using the *Add Work Element* link.

SSO Login for Service Request Portal Enhanced

Summary: Users that are currently logged in using SSO are no longer routed back to the SSO Login page a second time when they click a Service Request link.

Details:

Previously, all users were required to complete the SSO Login page regardless of whether they were logged in.

Material Requests on SRP

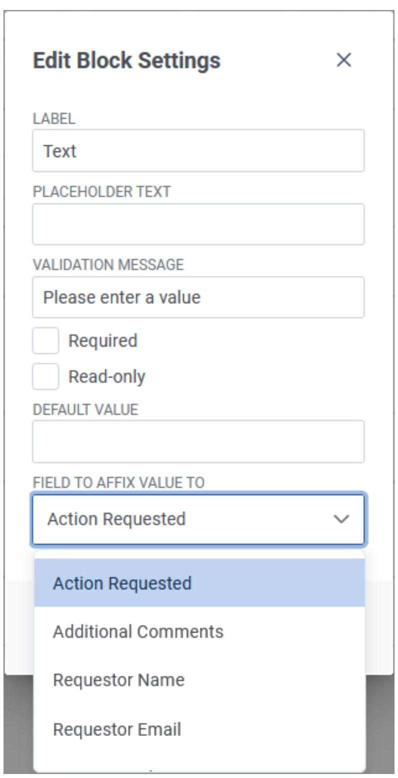
Path: *Admin > Form Attributes > Service Request Portal*

Summary: The Cost in Materials Request for the Service Request Portal now includes the full price charged to your customer of the material used.

Details:

If you use a markup on Parts, for example, the requestor sees the amount they are charged, which includes the markup.

Additional Options for the Custom Field in SRP



Path: *Admin > Form Attributes > Service Request Portal–Forms*

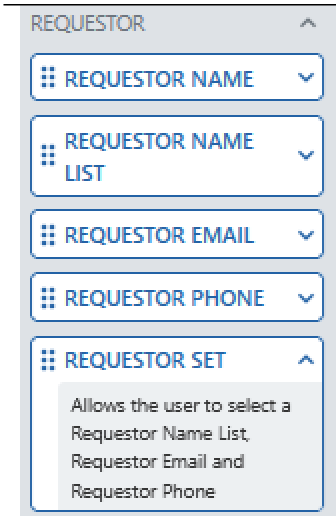
Summary: When you create Forms in the Service Request Portal, the *Custom Text Field* block in the Block Palette now has more options for the *Field To Affix Value To*.

Details:

In addition to *Additional Comments*, you can also add the following to the Custom block:

- Requestor Name
- Requestor Email
- Requestor Phone
- Status

Requestor Connections Added in SRP



Path: *Admin > Form Attributes > Service Request Portal–Forms*

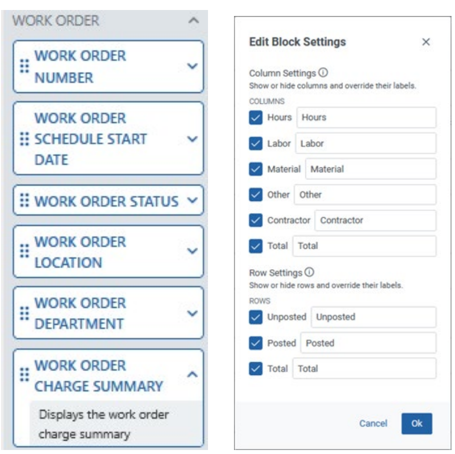
Summary: In the Service Request Portal, you can now manually connect the Requestor Email and/or the Requestor Phone to the Requestor Name block. In addition, the Requestor Name or the Requestor block can be connected to the Department.

Details:

Previously, the blocks did not accept these connections.

In addition, a new *Requestor Set* block has been added. This block has the Requestor Name, Requestor Email, and Requestor Phone connections pre-populated.

View Charge Total Added to SRP Search Status Tab



Path: *Admin > Form Attributes > Service Request Portal / Searches – **Status Tab***

Summary: The Search form for the Service Request Portal gives you the option to show the individual Work Order charge total.

If you want your client to see charges related to their request, you can use the new *Work Order Charge Summary* block on the ***Status* Tab**. Use *Settings* to select the columns you want your client to see.

Details:

When your client searches for a Request/Work Order you can choose whether they can see relevant Financial Data for their request.

Please note this is the Charge total and **not** the Cost total since the Charge total can be different from the Cost depending on your use of markups and rate schedules.

Requestor Information for SRP Status and Search

Path: *Admin > Form Attributes > Service Request Portal*

Summary: When using the Status and Search pages of the Service Request Portal, the Requestor information is taken from the Work Order if a Work Order is not connected to a Request.

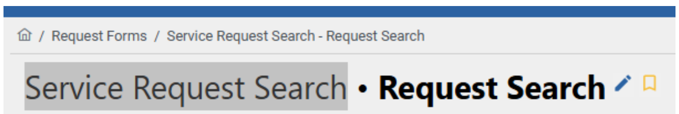
Details:

Previously, this information was not included in the Status and Search pages if the Work Order was not connected to a Request.

The following information will be taken from the Work Order is there is no Request:

- Requestor Name
- Requestor Email
- Requestor Phone
- Action Requested

More Work Orders Included in Service Request Searches



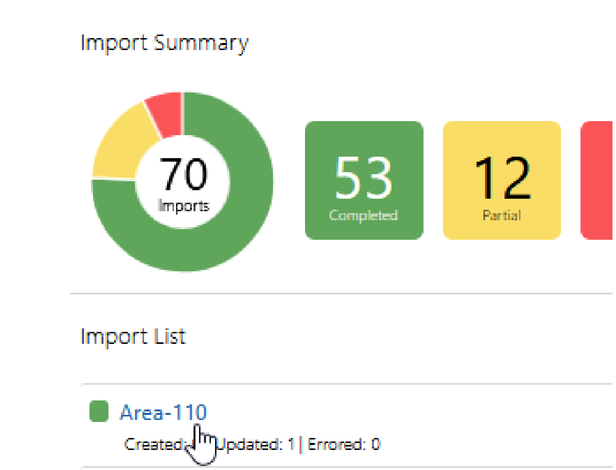
Path: *Admin > Form Attributes > Service Request Portal – Searches Form*

Summary: Work Orders not connected to a Work Order requisition are now included in the search results.

Details:

Other rules still apply. The Work Order number in the *Request # or WO #* field must be affiliated with the *Requestor Email* that is entered.

Mass Import Details Available for Import History



Path: *Admin > Mass Import / History Tab*

Summary: You can now see the details of any import listed on the *Mass Import / Import History* Tab.

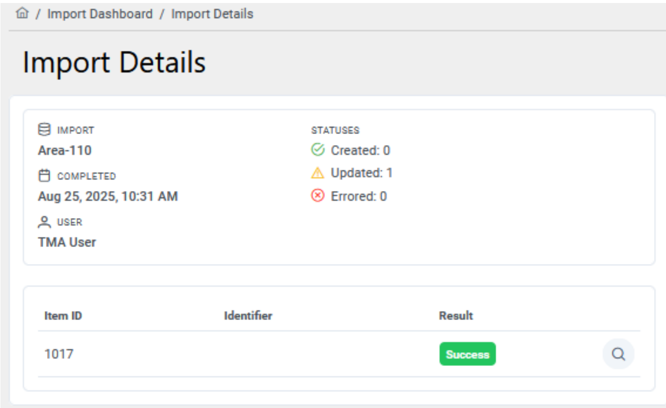
The import detail list that appears when you first import data is now available for later review.

Details:

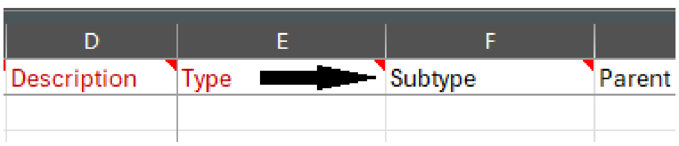
Click the import name in the Import List section to open the *Import Details* window to see a summary and all details of the import.

SFTP imports also show up in the import list and corresponding import details.

This applies to all imports – past and future.



Mass Import Now Includes Sub-Types for Locations



Path: *Admin > Mass Import / Templates*

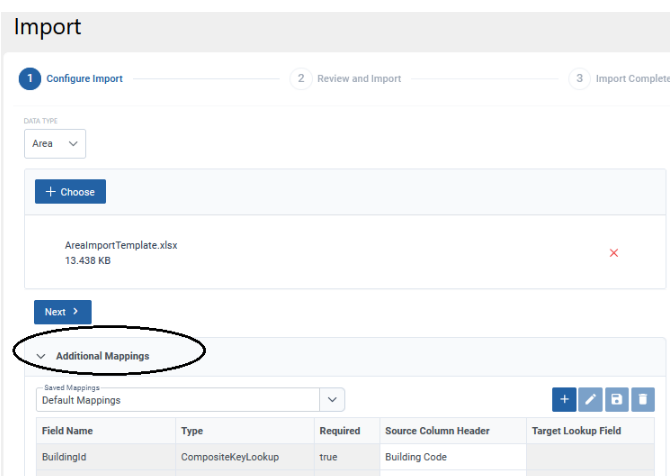
Summary: The Mass Import templates for location windows now accommodate *Subtype* as well as Type.

Details:

The following Templates have the Subtype column:

- Area
- Floor
- Building
- Facility

Mass Import Additional Mappings



Path: *Admin > Mass Import - Create*

Summary: You can map your own Excel spreadsheet for import using the new *Additional Mappings* section.

For those who use text files, these imports are also supported.

Details:

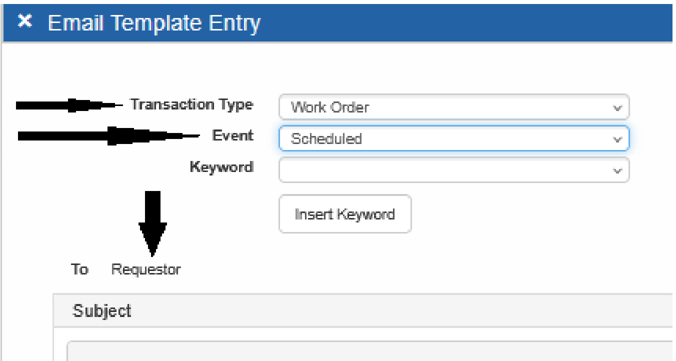
The *Additional Mappings* section is visible in the first step of creating an import.

If your data is already in an Excel format, you can map it and save your mapping settings to reuse in the future.

Text import mappings can also be saved in the same way.

Note: We do not support custom strings or langstrings that have been applied in *Admin > Text Management.*

Email Template Has Scheduled Event for Requestors



Path: *Organization > Repair Center > Records / Email Settings*

Path: *Admin > Email Settings*

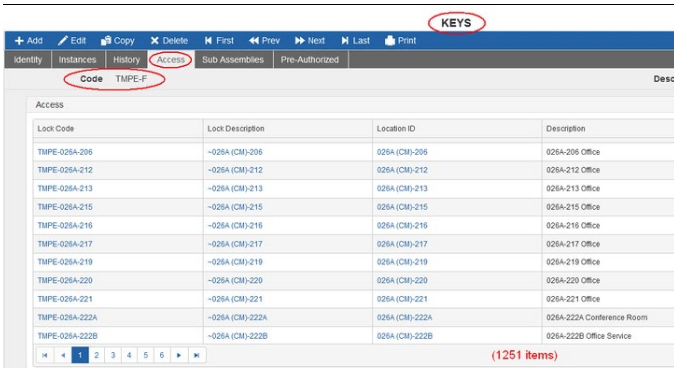
Summary: The Email Template now has a new *Event* option for Work Order *Transaction Type* settings. The new option is: Scheduled.

Details:

With Scheduled selected on an email template, you can send a notice to the Requestor that the Technician has been scheduled to the Work Order.

The *To* field displays Requestor when you select *Scheduled* in the *Event* field.

New Key Access Report View Added to Database Views



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

Summary: A new view for Keys Access has been added to Database views. The new view is: vrpt_keyAccessLockLocation

Details:

This view displays all the Lock information including child keys linked to the main parent Key.

Views are used for reporting for SaaS clients with Direct Database Connect or the Business Intelligence module. On-premise clients are strongly encouraged to use these views for reporting, rather than querying directly against transactional tables.

Click here to see the *List of WebTMA7 Database Views* in the Knowledge Base.

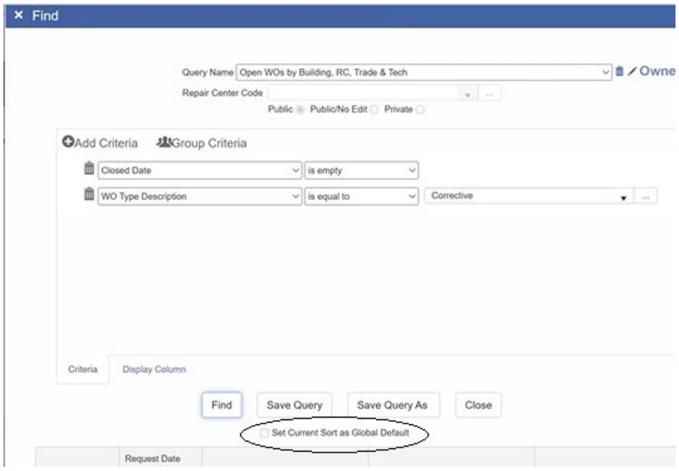
Query Sorts Can Be Saved Globally by Admins

Summary: A new check box on the *Find* window allows anyone with an Administrator Role to save the sort setting on any query and make it the global default.

Details:

Only those with the Administrator Role can make these changes that are displayed globally and on the Dashboard.

For Administrator Role logins, the *Set Current Sort as Global Default* check box is enabled.



Path: *From any Records page, open the Find panel*

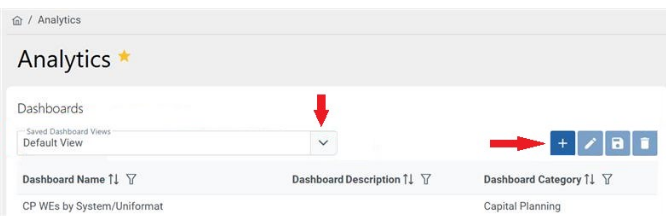
You can take these steps to set a Sort order:

1. Select a *Query Name*.
2. Click *Find*.
3. Click the header to sort the desired column.
4. Mark the *Set Current Sort as Global Default* check box.
5. Save Query.

The new sort is reflected on the query for all who view it from the Dashboard or from a module.

The Administrator can also rearrange Display Columns. These are shown on the Dashboard but not the *Find* grid.

Analytics Dashboard Saved Views



Path: *Reports > Analytics*

Summary: You can now create, edit, save, and delete your Analytics Dashboard views.

Details:

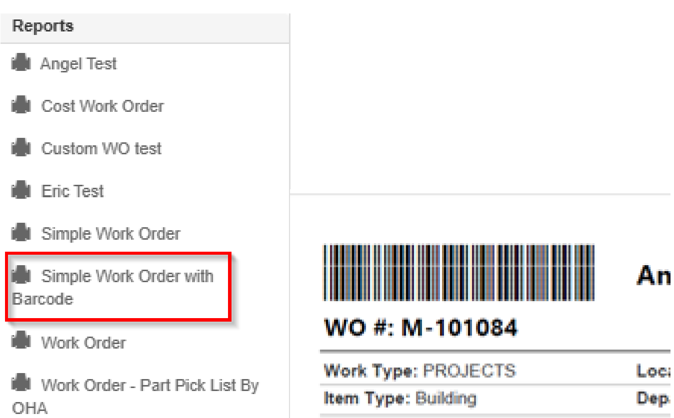
Use the buttons to the right of the *Saved Dashboard Views* field to perform the desired action.

Once you have saved your view, use the drop-down in the *Saved Dashboard Views* field to select the desired view.

The saved views are only available to the person who created them.

Note the initial window setting now displays **dashboards only** – not the drill-down or non-dashboard.

Work Order Simple Report with Bar Code



Summary: A new Simple Work Order report is now available for selection – *Simple Work Order with Bar Code*.

Details:

You can now choose which Simple Work Order meets your needs.

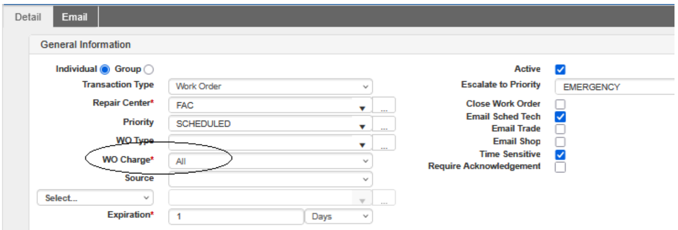
The bar code is displayed in the upper left corner of the report.

This is an October Voice of the Customer enhancement. We would like to thank Southern Illinois University-Carbondale for submitting this suggestion. We saw an opportunity to redevelop the page to be more user-friendly in all areas. WebTMA has evolved into the solution it is largely through

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

great feedback and suggestions provided by our clients.

Notification & Escalation Enhancement



Path: *Admin > Notification & Escalation*

Summary: A *WO Charge* field has been added to the *Notification & Escalation* window. Use of this field allows you to filter for Work Orders you want to close.

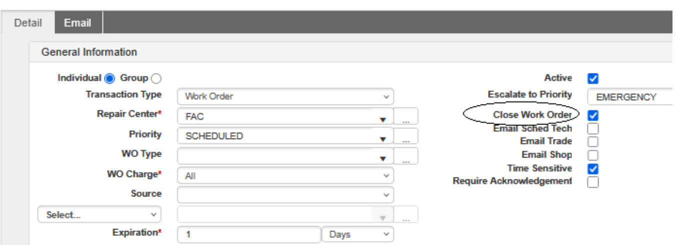
Details:

The field is visible when you choose a *Transaction Type* of *Work Order*. Use it to determine the Work Orders you want to close. You can use this field without marking the *Close Work Order* check box.

By default, the *All* option is selected but you can also select *Chargeable Only* and *Non-Chargeable Only*.

This is an October Voice of the Customer enhancement. We would like to thank the University of Missouri–Columbia for submitting this suggestion. We saw an opportunity to redevelop the page 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.

Notification & Escalation Field Name Change



Path: *Admin > Notification & Escalation*

Summary: The label *Escalate to Work Not Done* has been changed to *Close Work Order*; however, the functionality has not changed.

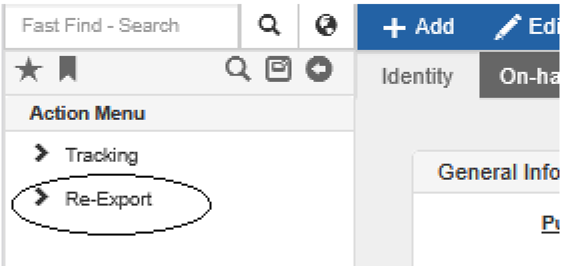
Details:

When you mark this check box, it forces the job to expire when a Work Order meets the established criteria. If the Work Order includes labor lines, it is closed. If no labor has been entered, Work Orders are marked as *Work Not Done*, and the Work Order is closed.

The rules of this window require an entry on the *Email* Tab for this action to occur – even if no message is needed.

Re-Export for UI

Summary: When you use UI to export information, you may have times when you need to export an item again. The option to re-export records has been added for those occasions. Several windows now accommodate the action with a *Re-Export* link on the Action Menu. Select the link to be able to export the record once more.



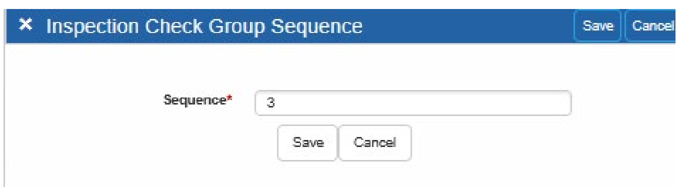
Path: *Transactions > Work Order > Records*
Path: *Transactions > Request > Request Log*
Path: *Material > On-hand Adjustments*
Path: *Accounting > Accounts Payable Invoice > Accounts Payable Invoice*

Details:

Look on the Action Menu of the following windows for the new option:

- Work Order (UI for Work Order Export)
- Request Log (UI for Work Requests)
- On-hand Adjustments (Universal Procurement Interface)
- Accounts Payable Invoice (Universal Accounts Payable Invoice)

GI Inspection Check Group Sequencing Added



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

Summary: Lines in the *Inspection Check Group* window can now be re-sorted easily.

Details:

Previously, the only way to re-order the list was to remove checks and add them back in the desired order.

A new *Sequence* column indicates the order and can be changed when you click the *Edit* button for a line, which automatically opens the *Inspection Check Group Sequence* flyout where you can enter the value of the desired position. The list re-sorts when you save the page.

Any Inspection Form that uses that Group Check is automatically updated with the new order.

NOTE: This new sort order does NOT apply to existing Work Orders that have already received a list. You can see the results for lists on new Work Orders.

Language Setting Supported on New Interface

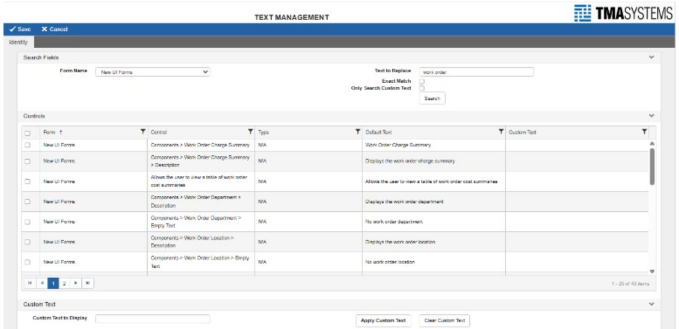
Landing Page in Spanish

Summary: The new interface pages in WebTMA, such as the Landing Page, now support language selection.

Details:

A default language can be established for your organization from *Admin > Client Info* window.

You can also select a different language for individual Users from the User record (*Admin > User Management > Records*). Reminder: When set from the User record, be sure to log out and log in again to see the change.



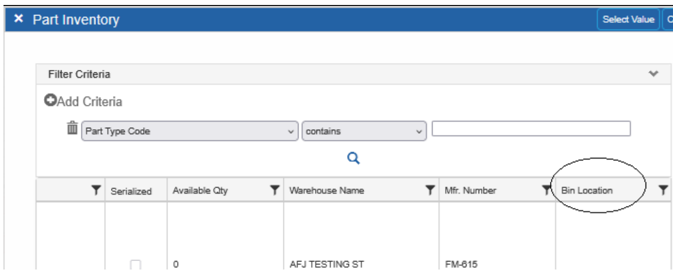
Path: *Admin > Text Management – New UI Forms*

Your **custom labels** made in *Admin > Text Management / New UI Forms* will modify **all the new UI pages**.

The following new interface pages are affected:

- AI SmartScheduler
- ContractorHub
- Service Request Portal
- Mass Import
- Bill of Materials
- GIS
- Data Subscriptions

Bin Location Column Added to WO Cost Entry-Part Inventory



Path: *Transactions > Work Order > Records / Cost Tab-Work Order Cost Entry–Part Inventory (Part/Material flyout opened with ellipsis)*

Summary: When posting Parts or Material to a Work Order, the *Part Inventory* flyout has a new column: *Bin Location*.

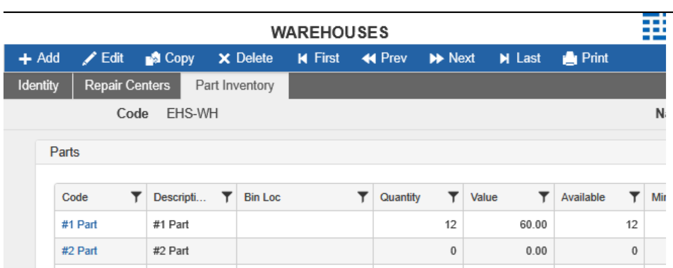
Details:

The *Work Order Cost Entry* flyout opens when you click *Post Part* on the *Work Order / Costs* Tab.

To see the *Part Inventory* flyout, click the ellipsis button for the *Part/Material* field. Most columns on this flyout can be filtered except *Image* or *Serialized*.

This is an October Voice of the Customer enhancement. We would like to thank Cencora for submitting this suggestion. We saw an opportunity to redevelop the page 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.

Filters Added to Warehouse Part Inventory Tab



Path: *Material > Warehouses / Part Inventory Tab*

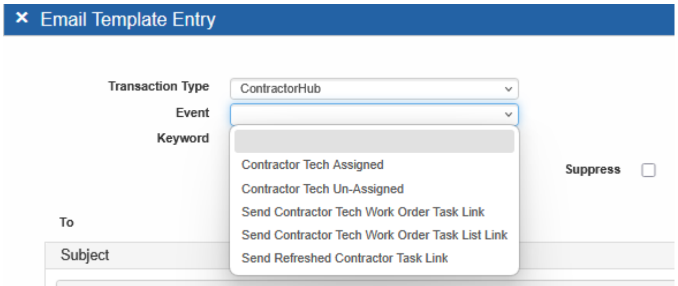
Summary: The *Warehouses/Part Inventory* Tab now has filters added to all columns.

Details:

All columns can be filtered in *Edit* mode.

This is an October Voice of the Customer enhancement. We would like to thank Cencora for submitting this suggestion. We saw an opportunity to redevelop the page 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.

ContractorHub Email Templates Added



Path: *Admin > Email Settings*

Summary: A ContractorHub *Transaction Type* is now available for you to create template content.

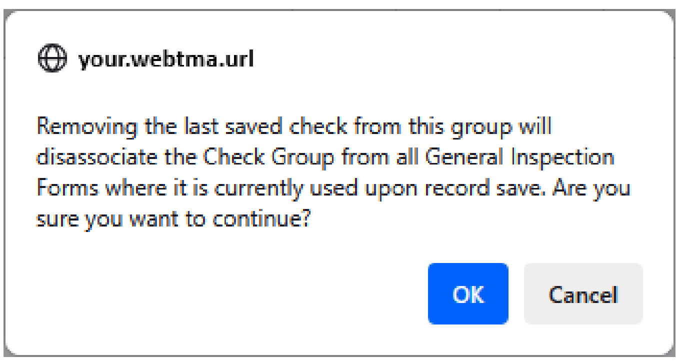
Details:

Your messages can be designed to help the contractor technician understand the work or find the location where work is to be performed.

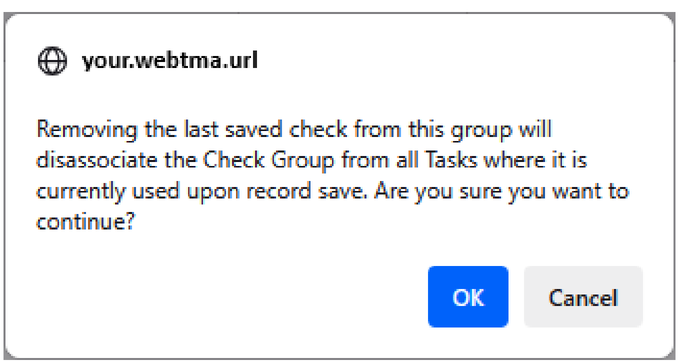
The following *Events* are available to create the email content:

- Contractor Tech Assigned
- Contractor Tech Un-Assigned
- Send Contractor Tech Work Order Task Link
- Send Contractor Tech Work Order Task List Link
- Send Refreshed Contractor Task Link

Check Group Alerts



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



Path: *Organization > Task > Task Check Group*

Summary: If you attempt to delete the final check from an existing check group, a message now pops up to alert you to the consequences. This applies to both **General Inspections** and **Tasks**.

For either window, deleting all checks from a group check **disassociates the record from all** other records where it is used.

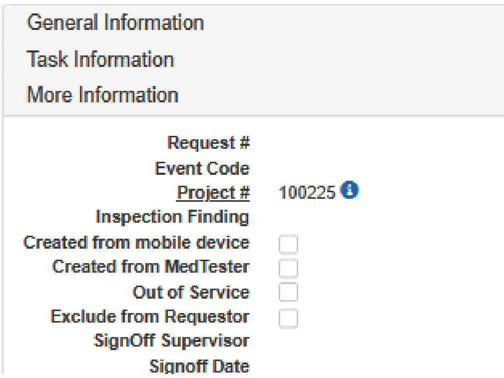
Details:

In the past, when all checks were removed, the check group record was automatically disassociated even before you clicked Save.

You now receive the warning shown at left when you delete a final Inspection Check or a final Task Check from the group record.

Click *Cancel* to retract your action and preserve the check group's association with other records.

Project # Retained for Corrective Check WOs



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

Summary: When Corrective Work Orders are created for General Inspections or Master Checks, the new Work Order now carries forward a related Project # if present.

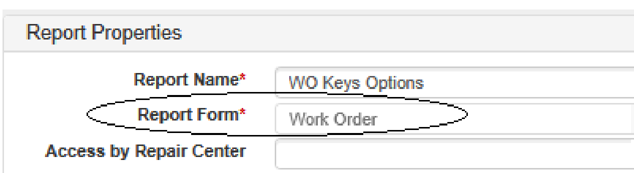
Details:

Project numbers are now carried over to Corrective Work Orders created from failed checks. This applies to:

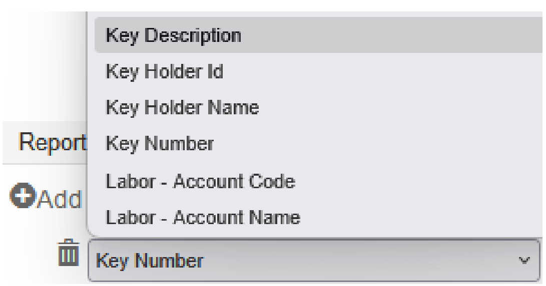
- Failed Master Checks (if Create Corrective WO is marked)
- Failed General Inspection Checks (single task)
- Failed General Inspection Checks (multi-task via Task grid button)

This behavior also applies to WebTMA mobile.

Report Form for WO Has Keys Criteria Options



Path: *Reports > Report Writer – Work Order*



Path: *Reports > Report Writer – Criteria*

Summary: The Work Order *Report Form* in Report Writer now has details about Keys available for Criteria selection.

Details:

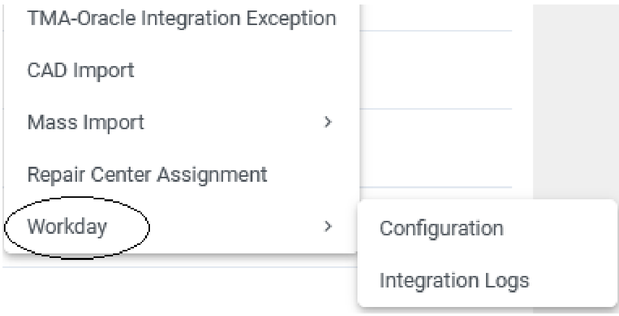
When you click the *Add Criteria* link in the *Report Criteria* section of the window, you now have the option to select any of the following Key details for your report:

- Key Description
- Key Holder ID
- Key Holder Name
- Key Number

Workday Integration

Summary: A new Workday integration for Account Validation and General Ledger Posting is now available. More integrations will follow in the future. This is an additional module.

Details:



Path: *Admin* > *Workday*

If you are a Workday client, this assures you can automate the process to save you time.

This module helps you automatically reconcile between the WebTMA GL and the Workday ledger.

Please contact your account manager for details on acquiring this new module.

Update Owner Button Added to Find Window

Summary: Specific users now have the option to change ownership of existing queries for any window.

Details:

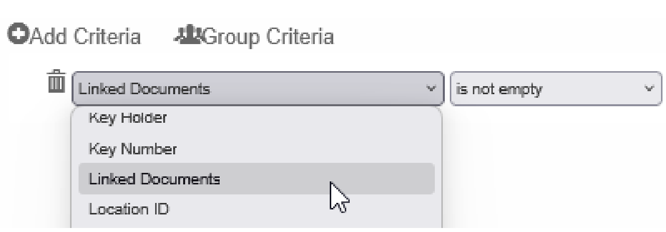
If the logged in user is the original creator (Owner) or someone who is assigned an Admin *Role*, they can see and use the *Update Owner* button.

1. Click the *Show the Search Panel* button on the navigation panel.
2. Select an existing query.
3. Click the *Update Owner* button on the panel.
4. Select the new owner.
5. Click *Save*.

Note: Admin *Roles* are assigned in *User Management*, and the *Update Owner* button is only visible **after you select a query**.

In many cases, the original Owner is no longer employed by your organization. This button is an easy way to allow an Admin to make changes to queries if needed.

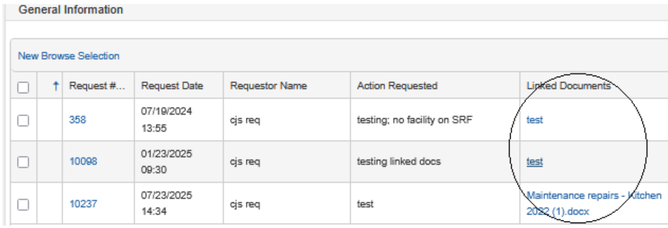
Linked Documents Now in Browse Windows



Summary: Request browse windows now have an option to search for records with Linked Docs. You can then add Linked Docs on the *Display Column* Tab. In the grid column for Linked Docs, clickable links are displayed so that you can download or view documents depending on the type of link.

Details:

If a Request has multiple linked documents, you can click a link for a flyout that displays all the documents. These can also be viewed without having to leave the browse window.



General Information

New Browse Selection

	↑	Request #...	Request Date	Requestor Name	Action Requested	Linked Documents
		358	07/19/2024 13:55	cjs req	testing; no facility on SRF	test
		10098	01/23/2025 09:30	cjs req	testing linked docs	test
		10237	07/23/2025 14:34	cjs req	test	Maintenance repairs - Kitchen 2022 (1).docx

Path: *Transactions > Request > Request Log – Find*
Path: *Transactions > Request > Request Browse*
Path: *Transactions > Request > Batch Validation*

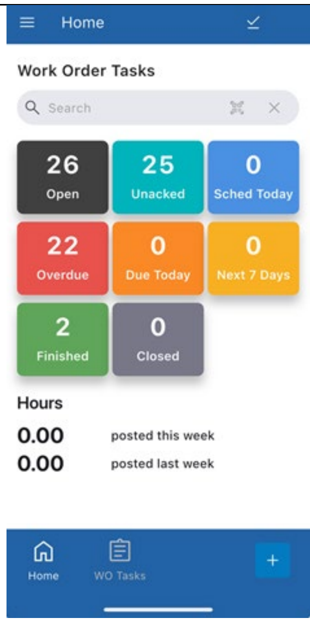
These new options are available for the following windows:

- Request Log > Find
- Request > Request Browse
- Request > Batch Validation

This is the November Voice of the Customer enhancement. We would like to thank the University of Northern Colorado for submitting this suggestion. We saw an opportunity to redevelop the page 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.

September 2025

WebTMA Mobile Now Available for iOS and MDM



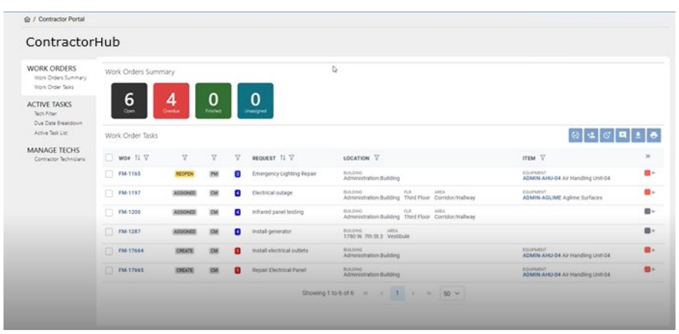
Summary: The WebTMA mobile product for Android was made available to On-Premise clients in June.

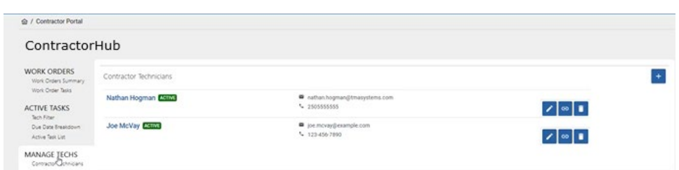
Details:

WebTMA mobile is now available for iOS and MDM as well.

See WebTMA Mobile Overview and related topics for more information about the features.

ContractorHub Now Available





Summary: The ContractorHub is a dedicated work order access for contractors that is easy and intuitive.

It is designed to benefit both your administrative staff and your contractors. In addition, it is a less costly approach than the current WebTMA method of contractor assignments.

Details:

Your administrative staff can assign work orders in batch to the Contractor.

Contractor Managers enter the names and email addresses of their Contractor Technicians and assign the work orders.

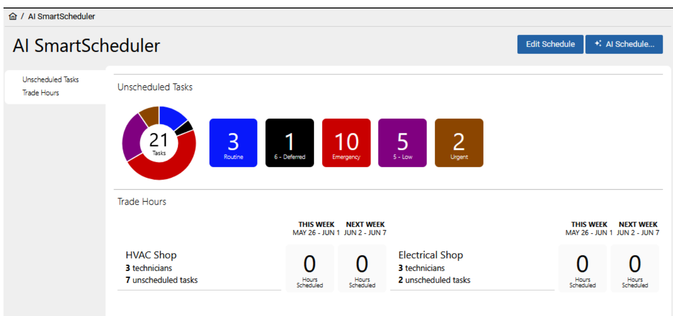
When assigned, the Contractor Technicians receive an email with a link to a simplified version of the work order that the technician can view on a mobile device (phone or tablet).

As work progresses, the technician can enter basic information such as arrival time, status, and comments.

The Contractor Manager updates the tickets rather than burdening your staff with the task. They can also attach a .pdf copy of their invoice if needed.

The ContractorHub requires a separate license. Please contact your Account Manager for more information.

AI SmartScheduler Now Available



Path: *Transactions > Time Manager > AI SmartScheduler*

Summary: The new WebTMA scheduling tool, *AI SmartScheduler*, gives you the option to have AI create a schedule for those who use Time & Attendance.

You have the option to accept or revise the results. You also control the Tasks and Trades that are included in a schedule.

Using the AI feature saves you time but still gives you control.

Details:

To enable the feature, grant your users appropriate permission to use the module. Go to *Admin > User Management > Records / Window Access Tab* and add permission for *AI SmartScheduler* in the *Time Manager* section.

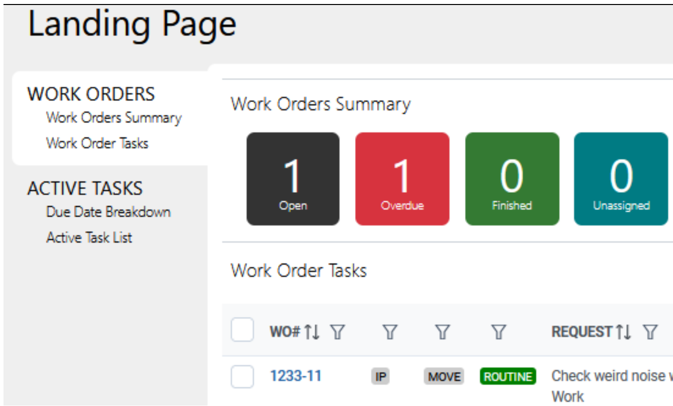
While the *AI SmartScheduler* windows are fairly intuitive to use, good results are only achieved if your data is prepared.

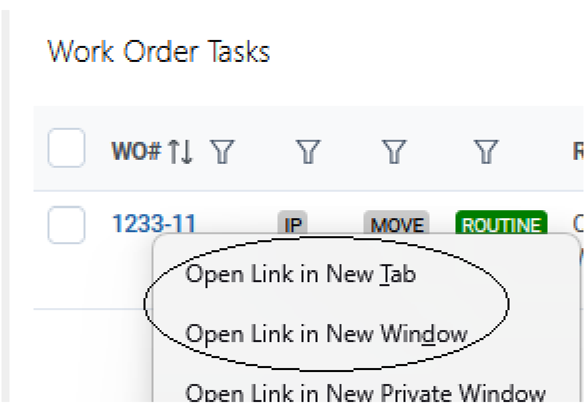
Task Preparation: The *AI SmartScheduler* requires an estimate of Task duration to generate and manipulate a work schedule. Be sure your Tasks have times to complete in hours. The system looks first at the *Labor Standard* field or if the field is empty to the *Average Time* field.

Technician Preparation: Any Technician assigned to Tasks by the *AI SmartScheduler* must be assigned the **correct Trade** or Trades and must also be assigned a **Shift.** The shift must be defined for the start and end shift times as well as days of the week that are worked.

Once your data is ready, the *AI SmartScheduler* window offers information about existing Tasks and Hours assigned to your Trades as well as an opportunity to immediately create schedules with or without the assistance of AI.

Landing Page WOs Open in New Tab on Right-Click





Summary: Work Order records shown on the Landing Page can now be opened in a New Tab or New Window using the right-click drop-down menu.

Details:

This applies to Work Orders on both Landing Page Tabs (*Work Orders* and *Active Tasks*).

Hold the mouse pointer over the Work Order number and right-click.

Select your choice from the drop-down window to see the Work Order record in a new Tab or Window.

This allows you to see details without closing the Landing Page.

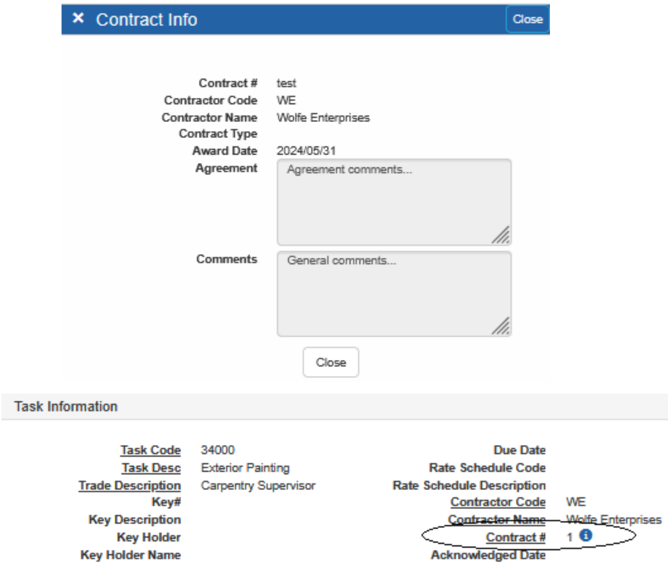
Work Order Contract Quick Information

Summary: If a Contract is assigned to a Work Order, you can easily view Contract details with one click.

For single-task jobs, click the Information icon next to the *Contract #* field. For multi-task jobs, click the *Contract #* link in the grid.

Details:

The flyout that opens when you click either the icon or the link shows the following information about the Contract:



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

- Contract #
- Contractor Code
- Contractor Name
- Contract Type
- Award Date
- Agreement
- Comments

Validate PMs Based on Season Start and End Dates

PM Schedule Entry flyout

Summary: PMs for items that use *Season Start* and *Season End* dates are checked to assure that at least one of the dates falls within the season.

You are alerted if the next PM date is set outside the season dates.

Previously, setting a PM outside season dates meant the PM was not generated.

Details:

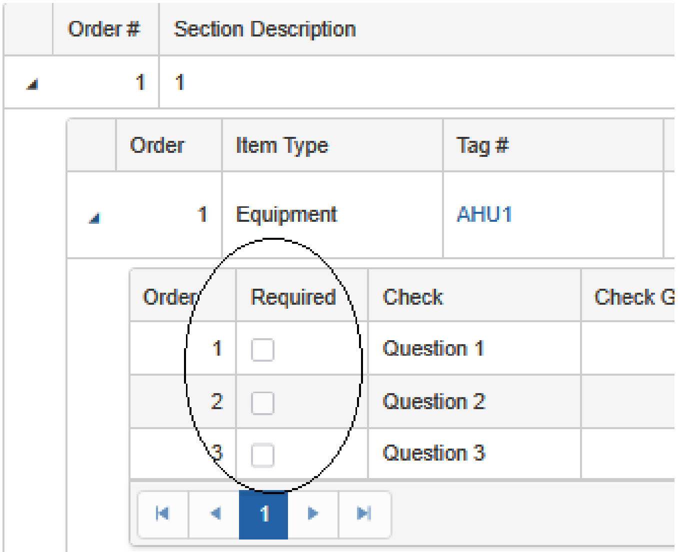
When dates are entered the following rules apply:

- Season End cannot occur before Season Start
- Both Season Start and Season End dates are required fields
- At least one projected next PM date must occur between the Season Start and Season End dates. This applies to both fixed and floating PMs.

General Inspection Individual Check Validation Added

Summary: You can now make individual General Inspections checks required before task closure. This is done from the *Inspection Form / Layout* Tab.

The required fields are applicable within the application and for legacy mobile products (WebTMA GO and mobileTMA GO).



Path: *Organization > General Inspections > Inspection Form / Layout* Tab

Previously, the only way to require checks was the global setting that required ALL checks to be completed before closure. This is made at *Admin > Client Info / Preferences - General Inspections* global setting "Require all inspection checks to be done before closing/finishing work order".

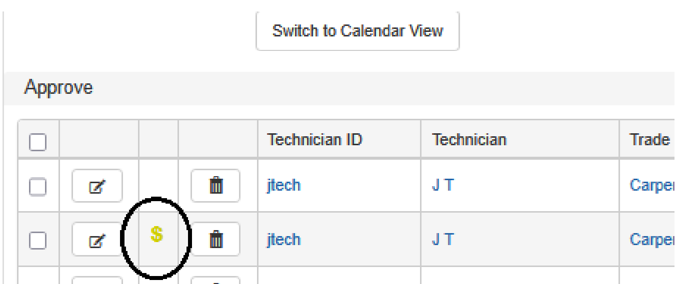
Details:

To mark a check as required, go to *Organization > General Inspections > Inspection Form / Layout* Tab and expand the second tier. Mark the check boxes in the *Required* column for any checks you want to require.

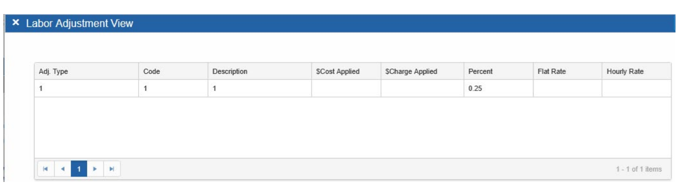
The required checks are designated with a red asterisk (*). Until all required checks are completed, the inspection cannot be marked as completed.

This is the July Voice of the Customer enhancement. We would like to thank Marshfield Clinic, Inc. for submitting this suggestion. We saw an opportunity to redevelop the feature to be more user-friendly. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Time & Attendance Labor Adjustment Icon



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



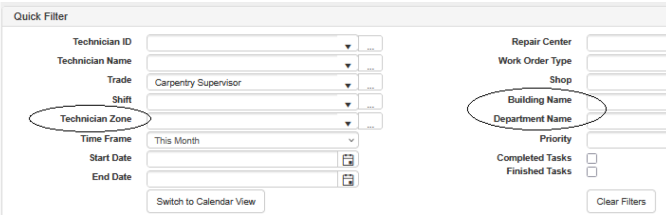
Summary: If you make Labor Adjustments to a Work Order, a gold dollar sign icon now displays on the Time & Attendance list of labor lines.

Details:

Click the icon to open the *Labor Adjustment View* flyout to see details about the adjustment.

Scheduler Window Quick Filter Changes

Summary: When you set criteria in the *Scheduler* in the *Quick Filter* section to review Technicians assigned to a Work Order, two new fields have been



Path: *Transactions > Time Manager > Scheduler*

added, and the *Zone* field has been moved and relabeled.

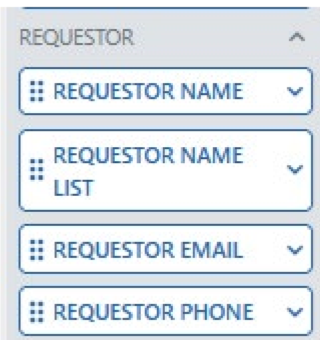
Details:

New fields labeled *Building Name* and *Department Name* are available on the right side of the *Quick Filter* section.

Originally, a field labeled *Zone* was on the right. It has been moved to the left and labeled *Technician Zone* to clarify that the field is to filter technicians.

The grid below the *Quick Filter* section also includes Department and Building columns.

Requestor Name List Added to Service Request Portal



Path: *Admin > Form Attributes > Service Request Portal*

Summary: The block palette on the *Form / Submissions* Tab of the Service Request Portal has a new Requestor option: *Requestor Name List*.

Previously, the *Requestor Name* was the only option, but this field lacks the option to select from a list of requestor names.

Details:

The new *Requestor Name List* field is a free text field and drop-down that allows your user to select a requestor.

Connecting the *Requestor Name List* field to Location fields auto-populates those Location fields once a requestor is selected.

When using an anonymous user, auto-populate may not work as intended due to the selected anonymous user's assigned access to Location data.

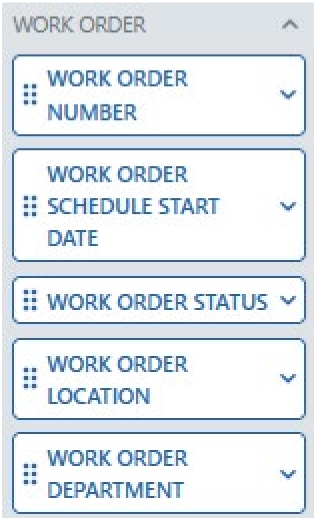
NOTE: The *Requestor Name* field is available and is still the default name field when creating a new Form. Either the *Requestor Name* or the *Requestor Name List* can be used in a Form, but not both. Use the Requestor Name field if you do not want your users to see other requestor's names.

Work Order Schedule Start Date on SRP Status Tab

Summary: The Block Palette on the Service Request Form now includes a field named *Work Order Schedule Start Date* on the *Status* Tab of the Form.

Details:

When used, the system looks to the earliest Technician's scheduled start date to populate the information.



Status Tab of a Service Request Form

Path: *Admin > Form Attributes > Service Request Portal*

Task Sheet Rich Text Is Now Optional

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

Summary: The *Task Sheet* section of the *Task / Identity* Tab now defaults to Plain Text with an option to *Use Rich Text* (formatted text).

Details:

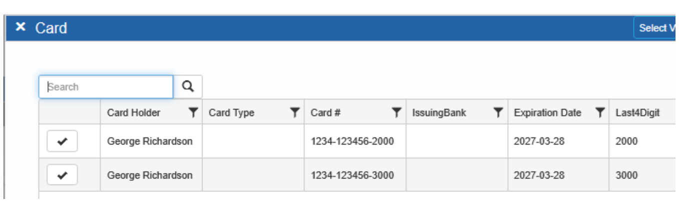
While many customers want to add formatting to the Task Sheet, this is not true for all.

By default, the *Task Sheet* section now uses Plain Text. To format the text, you can check the *Use Rich Text* box.

Note the highlighted alert above the *Task Sheet* field when you check *Use Rich Text*. It alerts you that:

"Saving as Rich Text could result in MarkDown characters being printed or displayed in reports."

P-Card Transaction Added Columns on Card Flyout



Path: *Material > P-Card > P-Card Transactions*

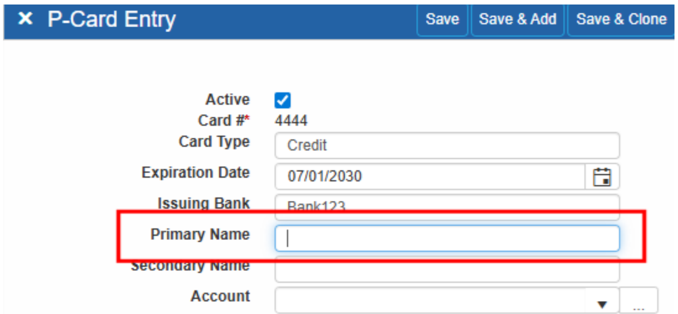
Summary: When adding a new Card to the window, the *Card* flyout that opens when you click the ellipsis icon for the *Card #* field now has additional columns.

Details:

Previously, this flyout window showed *Issuing Bank* and *Last4Digits*.

With this release, you can see the following:

- Card Holder

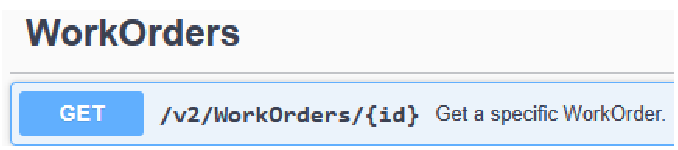


Path: *Organization > Repair Center > Technician / P-Card Tab*

- Card Type
- Card #
- Issuing Bank
- Expiration Date
- Last 4 Digits

The *Card Holder* column relies on information added to the *P-Card Entry* flyout on the Technician's record (*Repair Center > Technician / P-Card Tab*). Be sure to add Technician's name as the *Primary Name* on the flyout.

API Endpoints Enhanced



Summary: Our Work Order endpoints now show the last person who closed a work order.

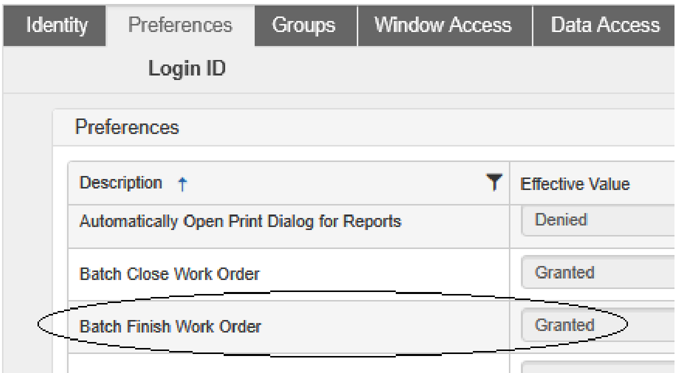
Details:

To use the endpoints, do a Get on the WorkOrder/{id} found in the Swagger WebTMA Platform API.

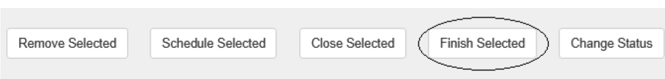
This applies to APIs only.

July 2025

Batch Finish Added to WO Browse Window



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



Path: *Transactions > Work Order > WO Browse*

Summary: The *WO Browse* window now includes a *Finish Selected* button to batch update selected records as finished if a new User Preference is granted.

Details:

To see the button, first grant the *Preference* for your Users or Groups. If you are testing the feature on your own login, be sure to log out and log in again to see the new button.

The *Finish Selected* button behaves in the same way as the *Close Selected* button. Mark the check boxes of the desired records, click the *Finish Selected* button, choose *OK*, and select the date/time.

This is the April Voice of the Customer enhancement. We would like to thank Brent Critchley from Greece Central School District. His suggestion was added to the Election for Direction at the User Conference. Thank you to those attendees who also asked for this enhancement. We saw an opportunity to redevelop the page 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.

Format Task Sheet on Task Window

Path: *Organization > Task > Records / Identity Tab – Task Sheet Section*

Summary: You can now add formatting to the *Task Sheet* Section of the *Task* window.

Details:

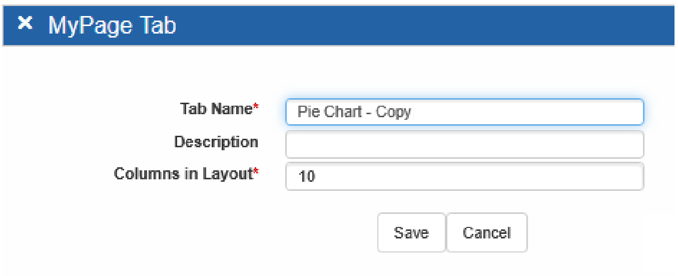
Using standard formatting tools, you can insert:

- Headings
- Bold, Italics, and strike-through text
- Lateral lines
- Quotation marks
- Bullets and numbered lists
- Links

The formatting is converted to plain text in our legacy mobile applications and reports. The WebTMA Mobile application does reflect this format.

This is the May Voice of the Customer enhancement. We would like to thank Cencora for submitting this suggestion. We saw an opportunity to redevelop the page 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.

Copy My Dashboard Tabs



Path: *My Dashboard*

Summary: An easy-to-use Copy feature has been added to *My Dashboard*. You can now copy an existing Tab using the Toolbar command.

Details:

Open the tab you want to duplicate and click *Copy* on the toolbar.

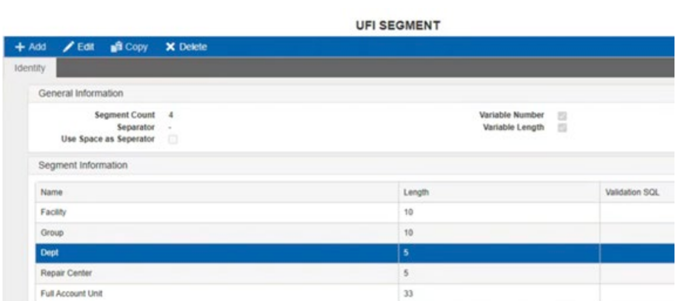
On the *MyPage Tab* flyout, change the name and description, click *Save*, and you have a new tab identical to the original.

If desired, you can change the number of *Columns in Layout*.

You can edit and adjust the new Tab if needed. You can use *Delete* on the toolbar to remove it if you copy a Tab in error.

This is the June Voice of the Customer enhancement. We would like to thank The Church of Jesus Christ of Latter-day Saints and other clients who spoke up in the TMA community for submitting this suggestion. We saw an opportunity to redevelop the page to be more user-friendly. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

UFI Account Segments Expanded to Fifteen



Path: *Accounting > Universal Financial > UFI Segment*

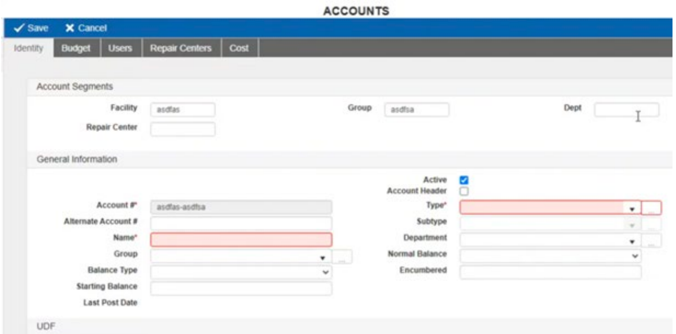
Summary: If you use the Universal Financial module, UFI Segments have been increased from 9 to 15.

Details:

For imports, an error message alerts you if there are more than 15 segments in the account number.

The import fails and the log file shows “Maximum Account Segments Exceeded” with the offending Account number.

This change supports integration with the Workday application.



Path: *Accounting > Accounts*

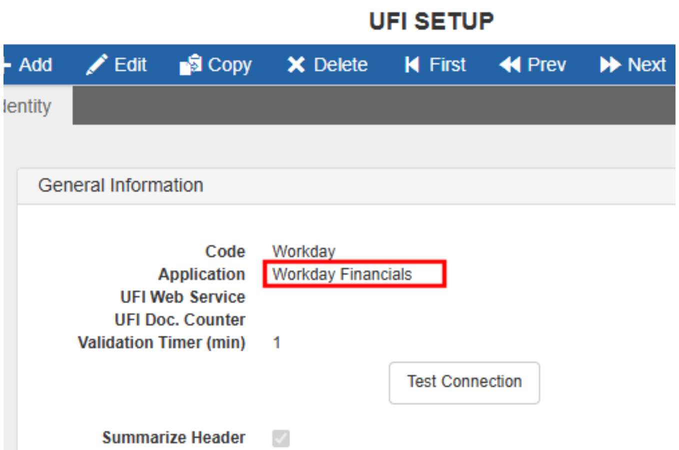
UFI Template Setup Has Additional Columns

Summary: If the *Application* field on the *UFI Setup* window is Workday Financials, the *UFI Template Setup* window includes separate Debit and Credit lines and columns.

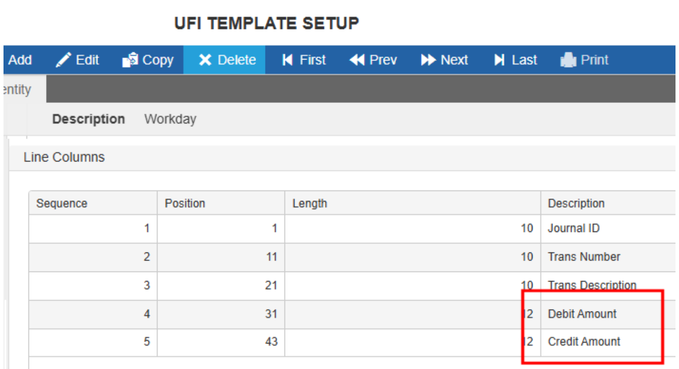
Details:

You now have the option to use two columns rather than a single Debit/Credit column. The separate lines can be used depending on how your ERP handles debits and credits.

This change also supports integration with the Workday application.

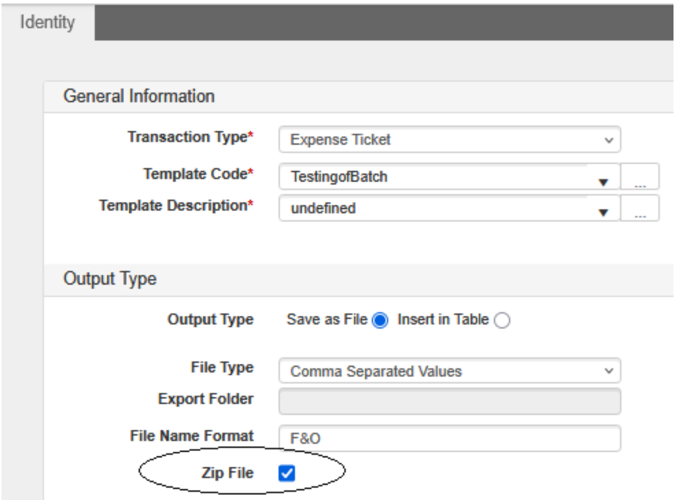


Path: *Accounting > Universal Financial > UFI Setup*



Path: *Accounting > Universal Financial > UFI Template Setup*

UFI Template Assignment Has Added Upload Functionality



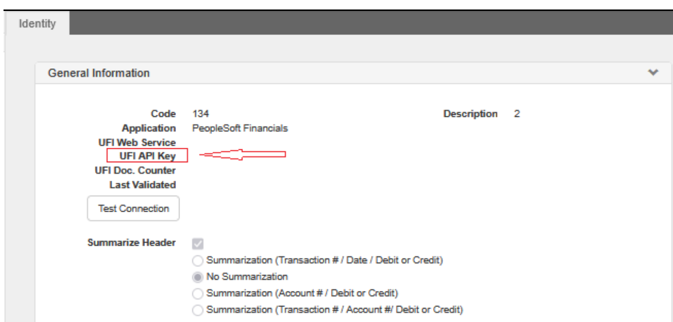
Path: *Accounting > Universal Financial > UFI Template Assignment*

Summary: The *UFI Template Assignment* window allows you to select .csv file names for upload. You can also choose to upload zipped files.

Details:

The *Zip File* box is checked by default to upload compressed files.

UFI Account Validation Added



Path: *Accounting > Universal Financial > UFI Setup*

Summary: This new UFI Account Validation process runs automatically each night.

Details:

When the batch job begins a new Post Charges process, a forced UFI Account Validation will execute **if at least 30 minutes** have passed since the last validation.

The **Batch Job Service** calls the **UFI Web Service.**

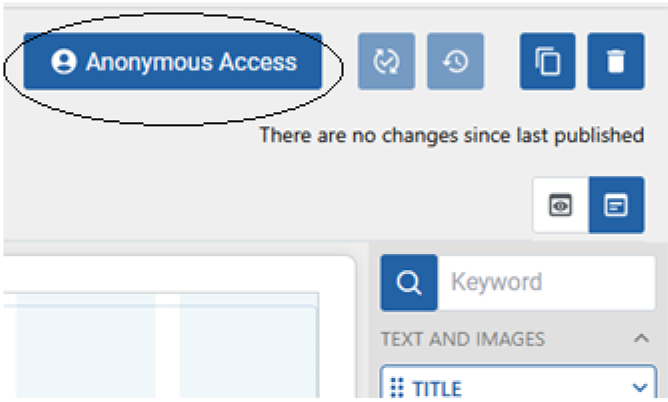
The UFI Web Service is installed locally in your environment and configured to connect to your **financial system database**. It must be publicly accessible so that the WebTMA batch job service can connect.

Access to the UFI Web Service is **secured via an API Key.**

Service Request Portal Access Notification

Summary: Both the *Service Request* and *Material Request* Forms for the Service Request Portal have an indicator to show the type of access used.

Details:

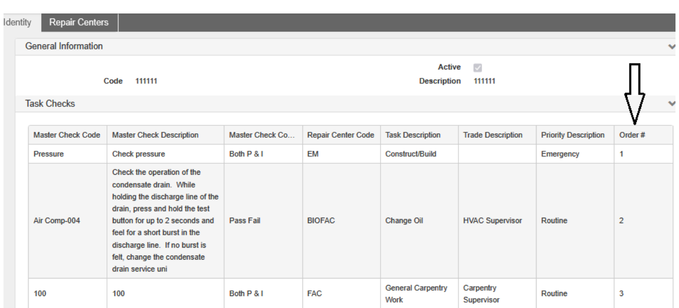


Applies to both *Service Request* and *Material Request*

The text of the button changes based on selected access.

Click the button to select a different access.

Order Sequence Column Added to Task Check Group



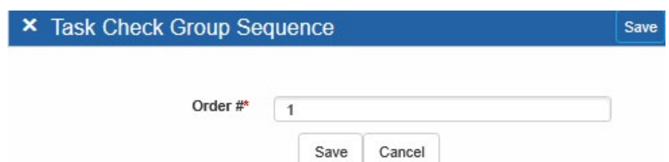
Path: *Organization > Task > Task Check Group*

Summary: A new column (*Order #*) has been added to the *Task Check Group* window.

Previously, the only way to determine the sequence that checks were listed was to add them in the order wanted. Now you can enter the Checks in any order and change the sequence using this new column.

Details:

In *Edit* mode, click the line edit button  to open the *Task Check Group Sequence* flyout.



Enter the sequence number desired, click *Save* on the flyout.

When you *Save* the full record, the lines are re-ordered.

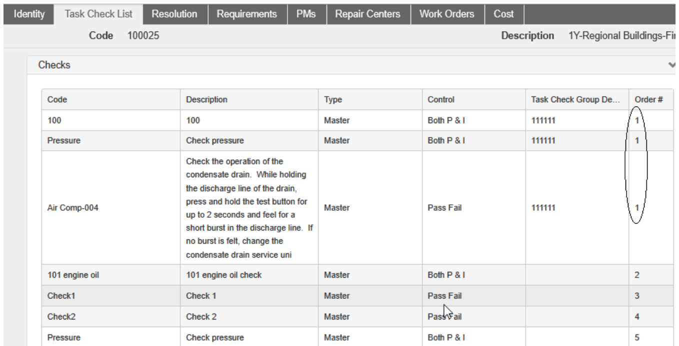
You can also change the order later if needed.

Task Check List Reflects Changed Group Check Sequence

Summary: Group Checks added to the *Task / Task Check List* reflect any changes you make to the sort order described in the previous topic.

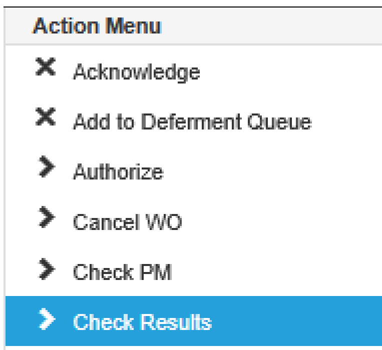
Details:

Note that the *Order #* column on the *Task Check List* Tab reflects the same number for each Group line, but if you change the line sequence on the *Task Check Group* window, the lines within the Group are re-sorted on this Tab as well.

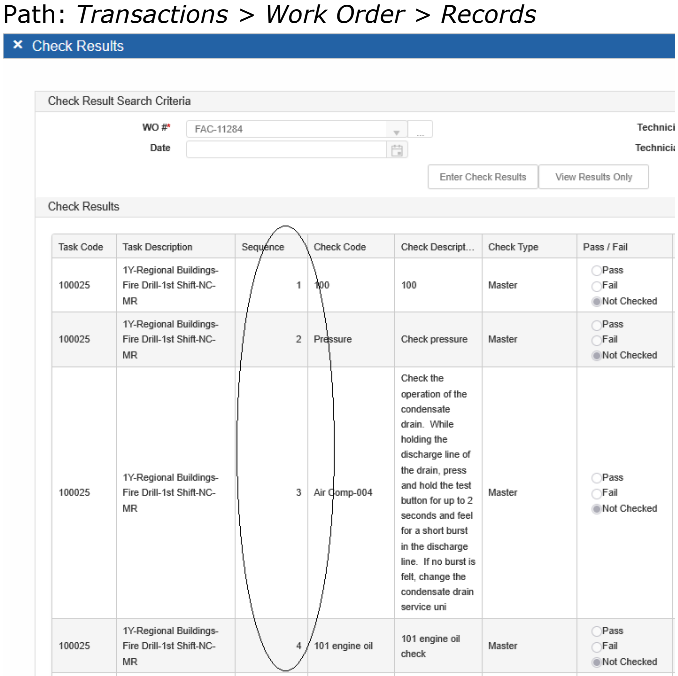


Path: *Organization > Task > Records / Task Check List Tab – Task Sheet Section*

Work Order Check Results Reflects Sequence Numbers



Path: *Transactions > Work Order > Records*



Path: *Transactions > Work Order > Records - Check Results*

Summary: The Work Order *Check Results* flyout reflects the list of tasks in the latest sequential order until the results are saved.

Details:

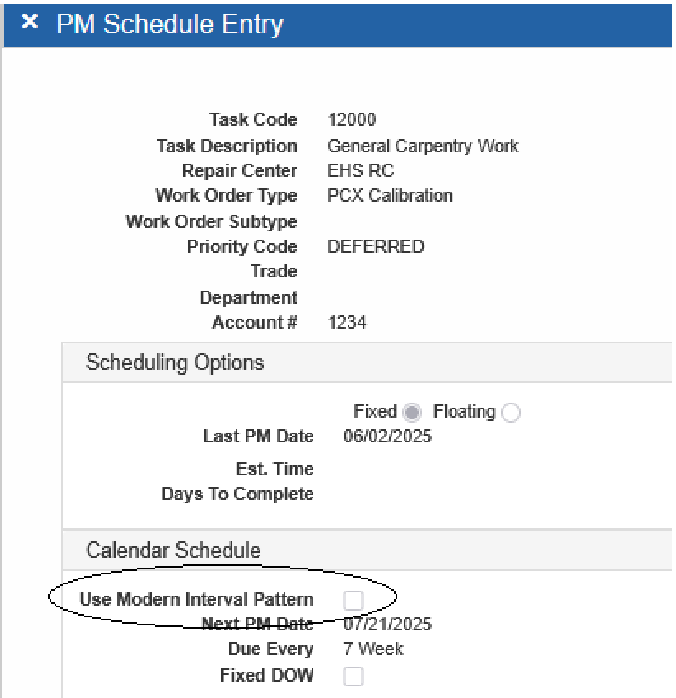
Where the *Task / Task Check List* shows the same number for each line in the Group, the *Check Results* list follows a normal 1, 2, 3… sequence.

Changes made to the sort order on the *Task Check Group* window are reflected on this flyout until it is saved. Once you click *Save* on the flyout, the sequence remains fixed.

Any changes made on other windows after the list is saved are not reflected on the *Check Results* flyout.

The sequence is also shown on the mobile applications.

PM Interval Selection Defaults to Legacy



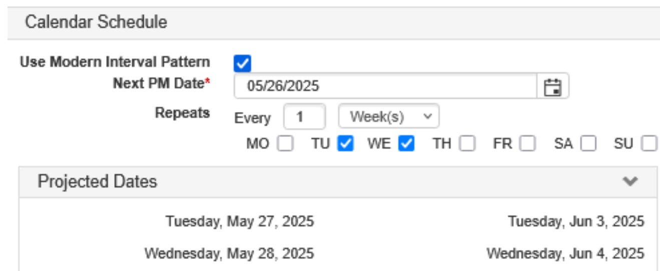
Path: *PMs Tabs*

Summary: When setting a PM Schedule, a new check box, *Use Modern Interval Pattern*, gives you the option to opt for the new RRule interval or use the Legacy version.

By default, the box is unchecked, meaning you are using the Legacy interval pattern.

Details:

Mark the check box to see the options using the new recurrence rules.



The *Use Modern Interval Pattern* check box is available on the *PMs* Tabs on MWI windows, Tasks, and anywhere PMs are scheduled, such as the *Batch PM Update* window when you use the *PM Schedule Mass Update* popup.

REMINDER: The new recurrence rules do not apply to Floating PMs.

Topaz Signature Pad Supported in WebTMA 7

Summary: If you use Topaz Signature Pads, WebTMA 7 accommodates the pads **if they are plugged in**. No other setup is needed.

Details:

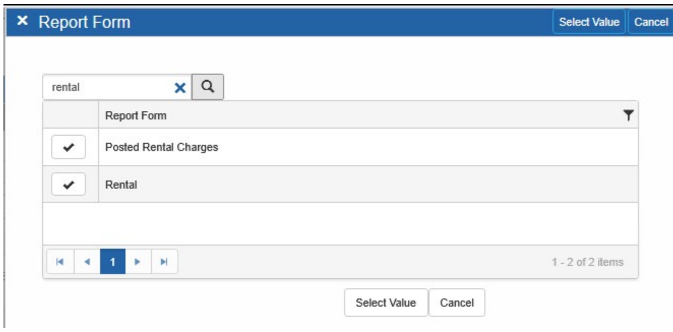
Any time you click *Signature* on the Action Menu (for windows that have that option), WebTMA 7 recognizes the Topaz Signature Pad.

You may notice a flash of the smaller signature window before a somewhat larger signature box displays. Other than that, it works the same as the regular Signature box.

When you install Topaz from https://www.topazsystems.com/sdks/sigweb.html and, if you have an HSB Topaz device, be sure to choose HSB/HSX rather than HSB alone. HSB devices go to the HID device rather than a COM port.

HSB models work automatically, but BSB models may require you to select a specific COM port when you install SigWeb.

Rental System Report Forms Include New Selections



Path: *Reports > Report Writer*

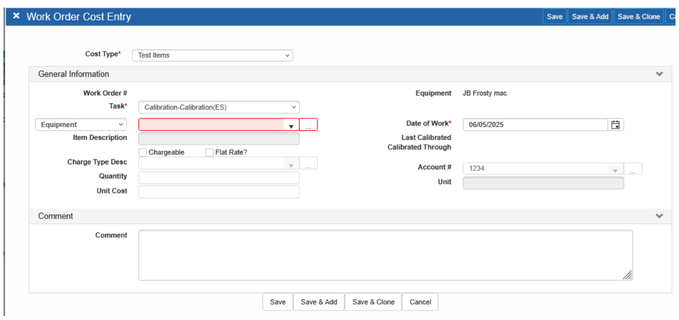
Summary: The *Report Form* selection window for *Report Writer* now includes two additional options.

Details:

You can now select the following Report Forms:

- Posted Rental Charges
- Rental

Flat Rate Applied on Work Order Costs Tab



Path: *Transactions > Work Order > Records / Costs Tab–Work Order Cost Entry flyout*

Summary: Calibrated MWI records that have a *Usage Flat Rate* on the item's *Rates* Tab or the MWI *Types / Rates* Tab can now apply the rate using *Post Test Items* on the *Work Order / Costs* Tab.

Details:

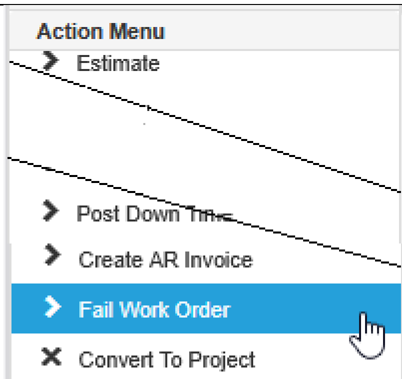
Once the item is selected for the Work Order, the *flyout Charge* check box on the *Work Order Cost Entry* flyout is enabled. A mark in the box populates any of the following (if available):

- Unit Cost
- Unit
- Account #

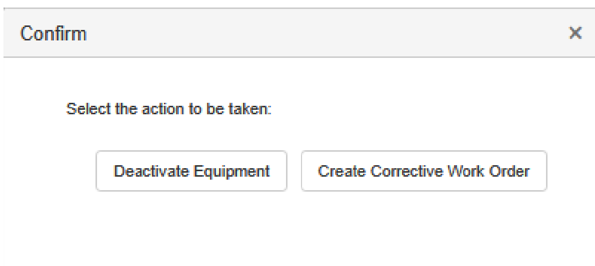
Mark the *Flat Rate?* check box to change the *Quantity* field to a value of 1 and replace the *Unit Cost* with the *Flat Rate* value from the MWI or MWI Type record.

If the selected MWI has Usage Rate values these are used. If not, the MWI Type value is used. If neither have a Flat Rate, nothing is populated.

Equipment PM – Fail Work Order Options



Path: *Transactions > Work Order > Records*



Summary: Equipment PM Work Orders can use a new Action Menu link – *Fail Work Order*. The link opens a popup with two options to process the Equipment records and Work Orders:

- Deactivate Equipment
- Create Corrective Work Order

Details:

The Action Menu *Fail Work Order* option is **only enabled for Equipment PM** records.

When *Fail Work Order* is selected, you can choose either option shown on the *Confirm* popup.

The selections affect the Task settings on the original Work Order as well as on the Equipment record.

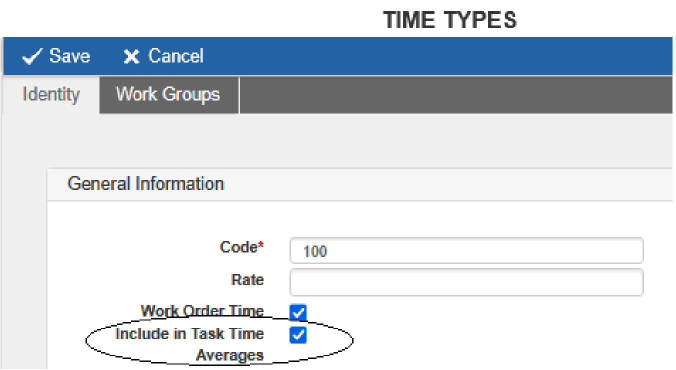
When you click ***Deactivate Equipment***:

- The Work Order is Closed including a date in the *Closed Date* field.
- Any Tasks on the Work Order are marked as *Work Not Done* and *Failed PM* on the *Work Order Task Entry* flyout.
- The Equipment record is deactivated, i.e., the *Active* check box is cleared.

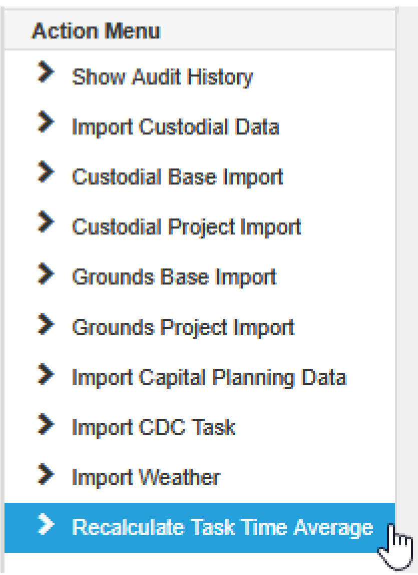
When you click ***Create Corrective Work Order***, a copy of the Work Order opens.

- Change the *WO Type Description* (PM not allowed).
- Note the *Source System* is shown as *Failed Work Order*.
- After the new Work Order is saved, the *Linked WO* Tab displays the original Work Order.
- The Original Work Order is marked as *Closed*, the *Closed Date* is populated, and all Tasks Order are marked as *Work Not Done* and *Failed PM* on the *Work Order Task Entry* flyout.
- The Equipment record remains *Active*; however, **dates are not changed** in the *Last Calibration* and *Calibrated Through* fields until the corrective WO is closed. Once the new WO is closed, the *Closed Date* of the corrective WO populates the *Last Calibration* field and *Calibrated Through* is calculated from the *Last Calibration* using the PM interval.

Manual Reset for Tasks Average Time



Path: *Organization > Lookups / Time Types*



Path: *Admin > Client Info*

Summary: WebTMA is hard wired to calculate the Task *Average Time* every night and insert this calculation in the *Average Time* field. Sometimes the resulting calculation does not match the desired value due to changes in labor hours that have already been calculated.

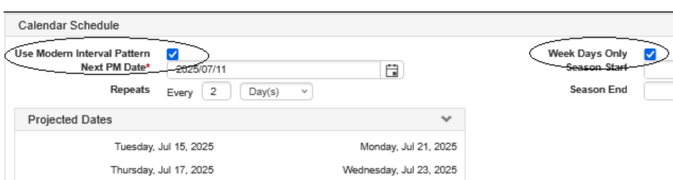
With this change, if you elect to include or exclude certain Time Types, e.g., travel times, you can choose the *Time Types* that are included in the calculation and manually reset the averages for all Tasks of that Type at one time.

Details:

Be sure to mark the *Include in Task Time Averages* check box on any *Lookups / Time Type* that applies.

To recalculate the averages for all Tasks of the marked Types, go to *Admin > Client Info*, and select *Recalculate Task Time Average* on the Action Menu.

New RRule to Set Weekday Only PMs



Path: *PMs Tab* and *Batch PM Update*

Summary: The Repair Center has an option to specify the *PM Week* when PMs are performed for either 5 or 7 days. If you use the new RRule *Calendar Schedule*, you can specify *Week Days Only*, for PM items, i.e., 5 days.

Details:

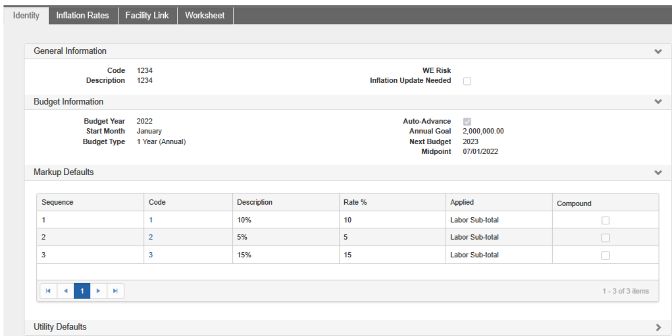
The new *Week Days Only* check box is only enabled when you mark the *Use Modern Interval Pattern* check box (the new RRule).

If the selected Repair Center for the item has a *PM Week* of 5, the *Week Days Only* check box is locked by default to conform to the rules for the Repair Center.

If you select multiple PM schedules to edit and any PM has *Week Days Only* marked, all PMs selected have the check box marked and locked.

The *Week Days Only* check box is locked as well for Make/Model if the Repair Center has a *PM Week* of 5.

Capital Setups Window Revised



Path: *Transactions > Capital Setups / Identity Tab*

Summary: The *Budget Information* Section on the *Capital Resets* window has been moved from the *Worksheet* Tab to the *Identity* Tab. Three fields are now required in this Section.

Details:

The required fields are:

- Budget Year
- Start Month
- Budget Type

These changes were made because the fields are required for the processes in the *Capital Planning Process* batch job to work correctly.

Capital Planning Batch Job Processing Time Reduced

Path: *Admin > Batch Management / Capital Planning Process*

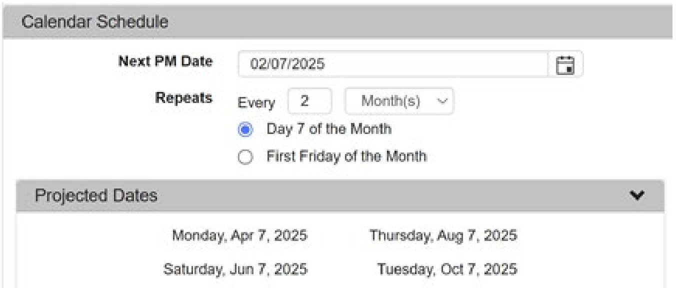
Summary: To improve processing time, optimizations were made to the *Capital Planning Process* batch job.

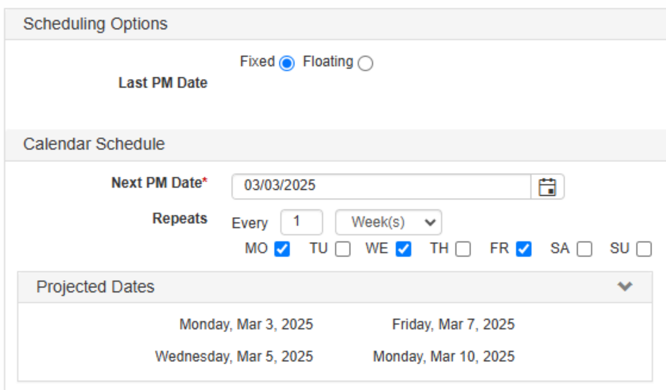
Details:

In our testing, we were able to reduce processing time from a **two-hour** run time to 12-13 **minutes**.

May 2025

PM Recurring Pattern Uses RRule*





Path: *PMs Tabs*

Summary: We have revised the *Calendar Schedule* section for PMs on the *PMs* Tab for both Tasks and Items.

For many years, our clients have requested a way to schedule for the third Tuesday, a given day of the week, or other specific pattern. You can do that with this new recurring pattern that is similar to MS Outlook or iCal.

The change allows you to be more precise in setting dates as well as selecting multiple days of the week on a single schedule. Previously, separate schedules were needed to specify different days.

Details:

* RRule is an industry standard in calendaring that implements the same standard recurring events you can see in email applications such as Outlook, Gmail, etc. This gives you more exact generation of PMs either by a date or a recurrence pattern.

The difference you see on the WebTMA interface is a few more options on the window. This update also provides projected dates.

When changing the schedule, you can see the next four projected dates to give you a sense of how this works. **Be sure to test** these settings to gain a better understanding of the process because it is somewhat different from the previous settings.

Following are examples of results when using a setting by Day or Day of Week:

Setting for **Day 14** Would give the following dates:

Friday, Mar 14, 2025

Monday, Apr 14, 2025

Wednesday, May 14, 2025

Saturday, Jun 14, 2025

Setting for the **Second Friday** has the following results:

Friday, Mar 14, 2025

Friday, Apr 11, 2025

Friday, May 9, 2025

Friday, Jun 13, 2025

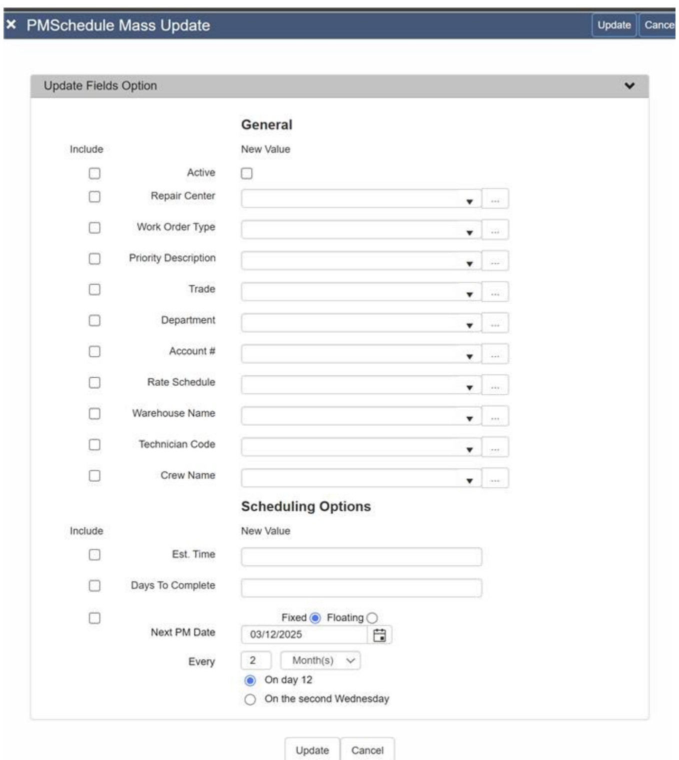
NOTE: Floating Schedules are NOT supported by the RRule. Currently, existing PMs use the old style, and new PMs follow the RRule. For **new** dual-based

(Meter and Calendar) PMs, the calendar portion follows the new rules. In a **future release**, you will be able to change existing PMs to the new rule.

This was a February Voice of the Customer enhancement that was slightly delayed because of the complexity of the enhancement. We would like to thank Cencora for submitting this suggestion. We saw an opportunity to redevelop the page 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.

* RRule refers to a rule or repeating pattern for recurring events.

Batch PM Update Supports Recurrence Rules



Path: *Admin > Batch PM Update*

Summary: The new PM Recurring Pattern that uses the industry standard RRule has been extended to the *Batch PM Update* window.

As a reminder, the new calendar scheduling rules apply to Fixed PMs. The previous rules apply to Floating PMs.

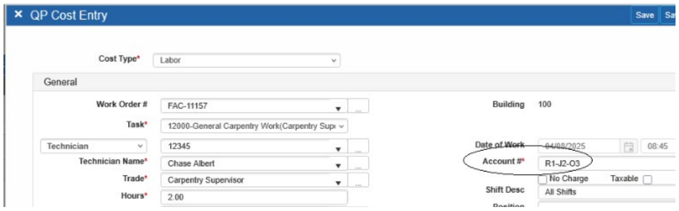
Details:

All desired check boxes must be marked to save changes.

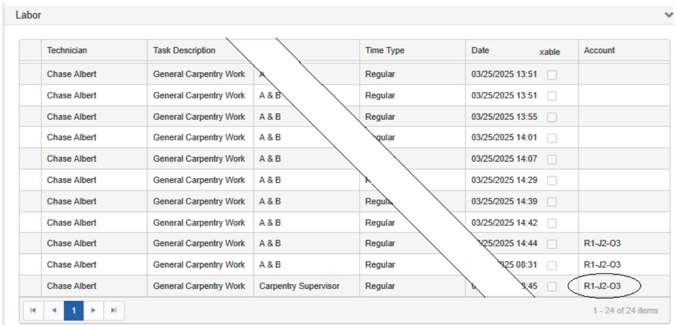
If you have not completed all required fields for the new scheduling rules, an alert notifies you that, “Next PM Date, Interval, and Frequency are required.”

QP Cost Account # Now Defaults to WO Costs

Summary: Costs entered from the *Quick Post* windows frequently have an associated *Account #* that automatically populates that field. Previously, that *Account #* did not carry over to the related cost line on the *Work Order / Cost* Tab. With this change, the account number displays on the Work Order cost



Path: *Transactions > Quick Post > Quick Post Cost*



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

line regardless of limits placed on the *Account #* field (described in the Details below).

Details:

Your System Administrator can disable the *Account #* field from *Admin > Form Attributes > System Form Attributes* so the account cannot be changed on the *Quick Post* window. Regardless of this setting, the *Account #* still appears on the Work Order cost line.

For example: The *Account #* field on the *Quick Post Time Labor Entry* window is disabled. The intention is to prevent a user from manually changing the *Account #*. At the same time, the client wants the default *Account #* to be saved to the database, i.e., to show up on the *Work Order / Cost* Tab. Note: The *Account #* populates the field with the number that is associated with the Technician record.

Additional Languages Supported in WebTMA 7

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

Except for Malay, these languages are also accessible from legacy mobile products as well.

Details:

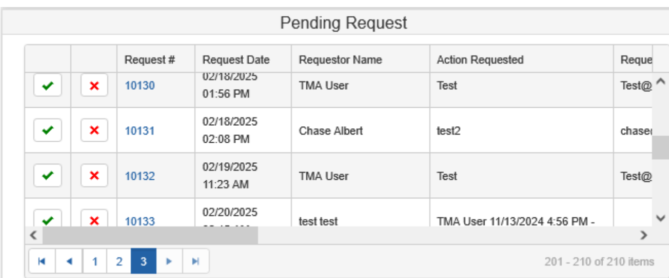
Your WebTMA Administrator determines the default language used in the application; however, individual users' preferred settings can be made from the User record or from the *File > Personal Info* window. These settings override the Client Info selection.

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 the additional languages that are now supported:

- Greek
- Italian
- Japanese
- Korean
- Chinese Trad
- Arabic
- Russian
- Malay
- Turkish

Executive Dashboard Reject Request Option



Path: *My Dashboard*

Summary: Those who use the Executive Dashboard module on My Dashboard now have the option to Reject requests.

Previously, managers only had an Accept option for requests on the dashboard.

Details:

The new Reject column contains a red X button (Reject) next to the green check button (Accept).

This is a March Voice of the Customer enhancement. We would like to thank Jefferson Health for submitting this suggestion. We saw an opportunity to redevelop the page 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.

Source Field Added to Work Order

Path: *Transactions > Work Order > Records*

Summary: A new *System Source* field has been added to the *Work Order* window.

Work Orders created by copying a Work Order now display "WO Copy" as the source in this new field and requestor details (name, phone, and email) are cleared on the copied work order.

The first source available in this field is *WO Copy*; however, the source of some generated work orders, such as Failure Code, will be added in the future.

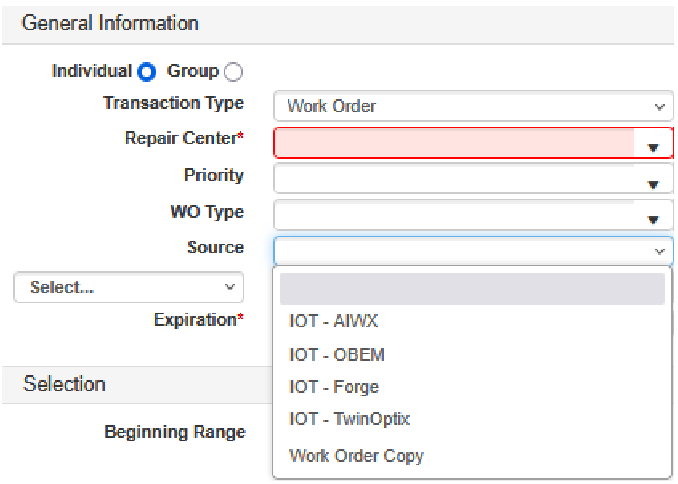
Details:

Look to the *More Information* section for the read-only *System Source* field.

The Work Order Source ID can be queried, found in reports, and is accessible in DDBC.

NOTE: When a new Work Order is created, this field remains blank by default.

Source Field Added to Notification & Escalation



Path: *Admin > Notification & Escalation*

Summary: The new Work Order Source concept is also applied in the *Notification & Escalation* window.

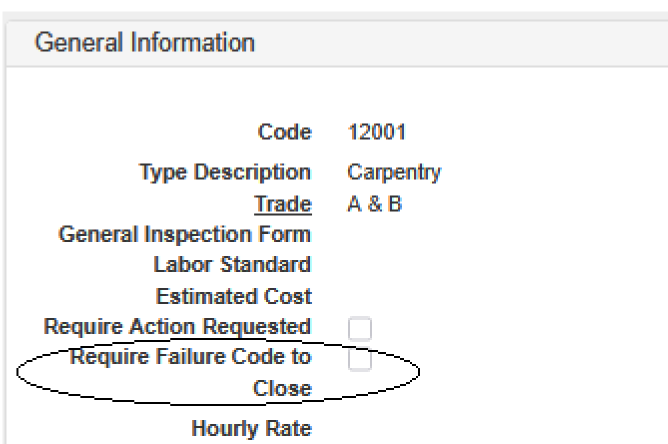
Details:

In the *General Information* section, look for the *Source* field. This is another optional rule for filtering work orders.

Currently, the *Source* field drop-down is available for IoT records and Work Order Copy. Failure Code will be available in the future.

Like the Work Order *System Source* field, the Work Order Source ID can be queried, found in reports, and is accessible in DDBC for Notification & Escalation.

‘Require Failure Code to Close’ on Task Window



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

Summary: The *Tasks / Identity* Tab now has a *Require Failure Code to Close* check box.

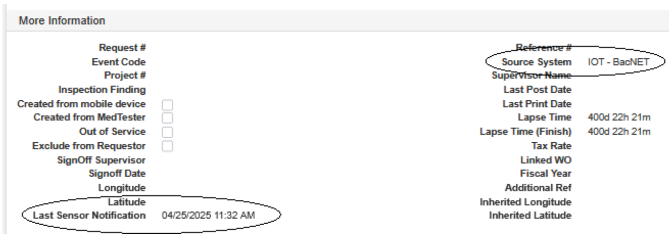
Details:

This feature makes sure that the Failure Code is always indicated.

By marking the new check box, you can assure that Work Orders that require Failure Codes always have them before the Work Order can be closed.

This applies to in-application records and is not currently available in mobile devices; however, it will be enhanced at a later date.

New Work Order Field: Last Sensor Notification



Path: *Transactions > Work Order > Records / Identity Tab – More Information*

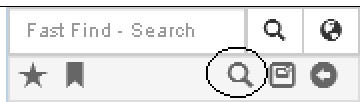
Summary: Work Orders generated through the Smart Business Integration module show this field to indicate the last time an alert was sent from the sensor regarding a failure issue.

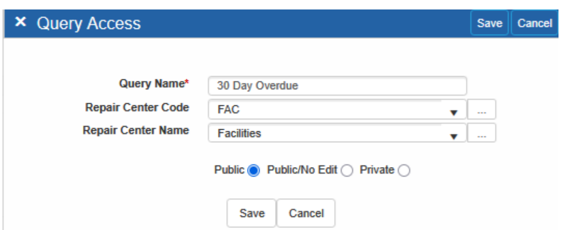
Details:

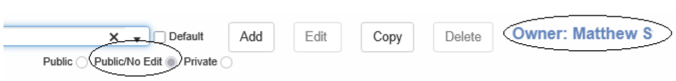
Since the outside software continues to send frequent alerts after the Work Order has been created, the date and time in this field assures you that the alert has been received and is still an active problem.

The field is only visible if the read-only *Source System* is one of the IoT sources.

Make Queries Public, Public/No Edit, or Private







Example of Owner Indicator for Public/No Edit

Summary: When you use the *Find* flyout, you can create either a one-time search or save your query for repeated use and select designated access.

Details:

When you click the *Save Query* or *Save Query As* button, the *Query Access* flyout gives you several options.

You can designate the Repair Center to which the query applies or leave it blank and search all Repair Centers.

In addition, you can designate who can see or use the query.

Here are the properties of the three settings:

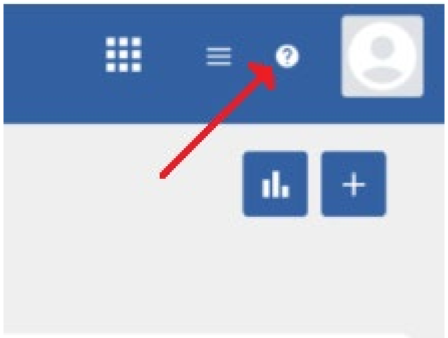
- **Public**. This query is available to all users. Anyone can save or delete the query.
- **Public/No Edit**. Users can view and use the query, but they cannot save or delete the query. Only the owner, i.e., the person who created it, can make changes.
- **Private**. The query is invisible to all users except the owner. Only the owner can save or delete this query.

New UI Context Sensitive Help

Summary: Context sensitive help is now available for the new UI windows.

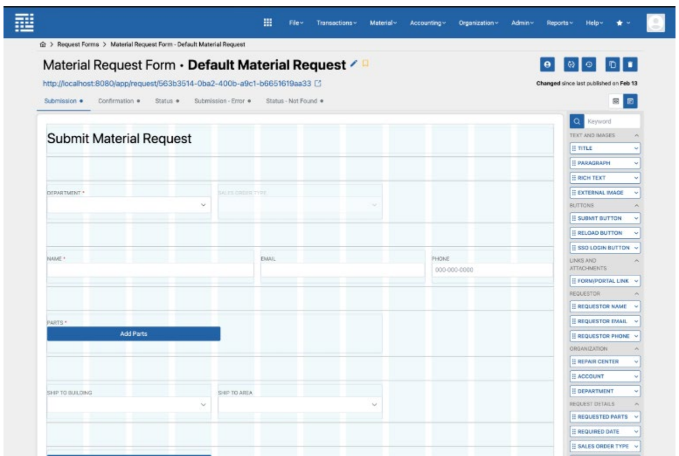
Details:

Click the *Question Mark* icon at the upper right to open online help about the current page.



The new windows now open Help the same as using the *Question Mark* icon in other parts of WebTMA 7.

Material Request Added to Service Request Portal



Path: *Admin > Form Attributes > Service Request Portal–Material Request*

Summary: The Service Request Portal (SRP) now includes a Material Request form that allows your requestors to ask for the Parts or materials they need.

This is another enhancement to SRP to make your request links easy to create and easy for requestors to use.

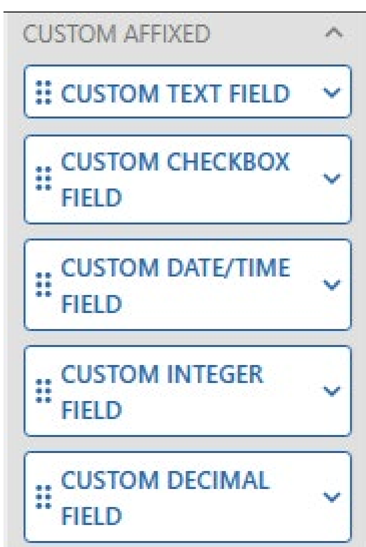
Details:

Like other SRP forms, you can use the Block Palette to drag the desired features to your Material Request page.

Standard buttons, links, Requestor, and Organization blocks are available.

In addition, Parts, Sales, and shipping information can be added.

Map Action Requested and Comments in Service Request Portal



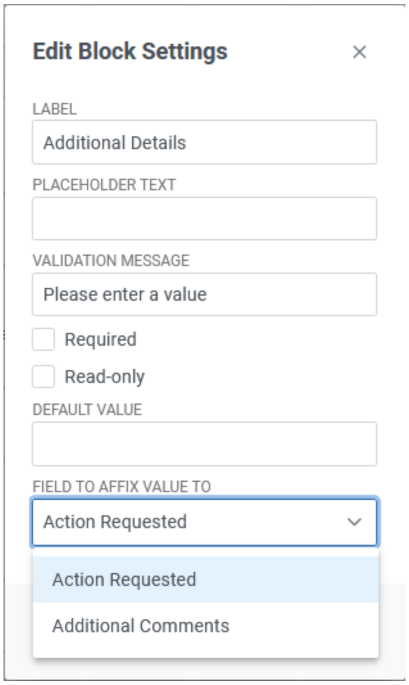
Summary: Contents of the *Custom Text Field* block (found in the *Custom Affixed* section of the *Service Request* Form) can be mapped to certain other fields. This allows you to append the contents to the mapped field.

When you edit your *Custom Text Field*, you can specify whether to affix the field values to the *Action Requested* or *Additional Comments* fields in your Form.

Details:

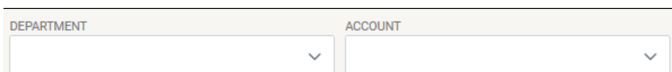
Field values are concatenated in the *Action Requested* or *Comments* fields.

Frequently, this is information that does not show on the Work Order but is needed by a Technician.



Path: *Admin > Form Attributes > Service Request Portal*

Service Request Portal Allows Dept.–Acct. Auto-Population



Path: *Admin > Forms > Service Request Portal*

Summary: The *Service Request Submission* and *Material Request Submission* Forms have default auto-populating behaviors for Department and Account blocks.

Details:

If the Form includes both the *Department* and *Account* blocks, an entry in the *Department* field causes the *Account* field to be populated with the Department's *Account* number.

If the logged-in user accessing a Form has an assigned Department, the *Department* field is automatically populated with the user's Department.

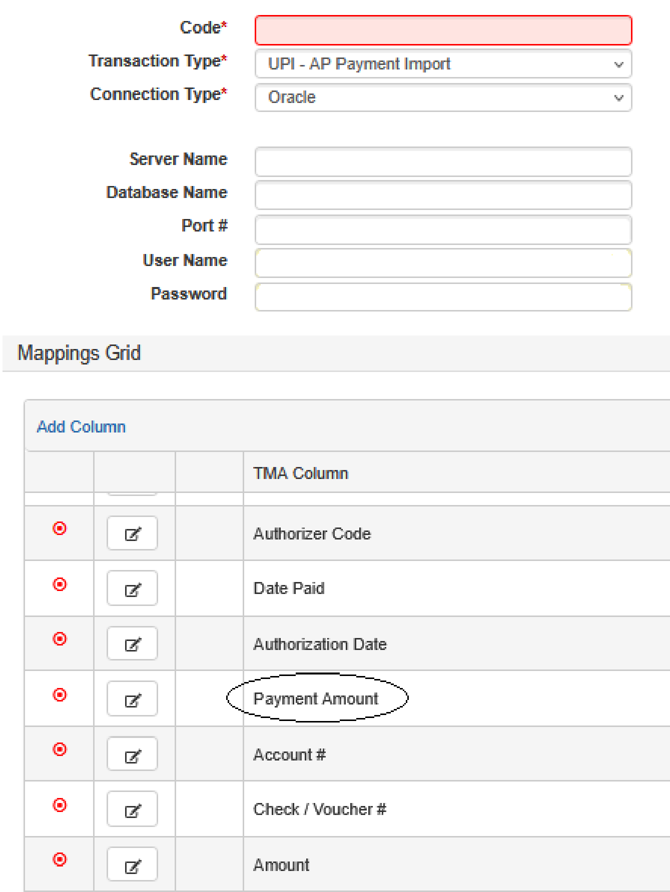
UPI – AP Payment Import Column Added

Summary: If you use the Universal Procurement Interface to import AP Payments into WebTMA 7, you can specify line-item payments in the Mappings Grid.

Details:

The columns include:

- Payment Amount (from line-item)

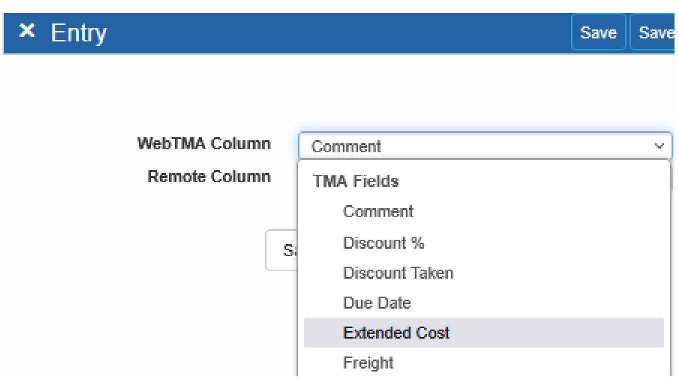


Path: *Admin > Universal Interface*

- Amount (from header)

Both are listed by default in the Mappings Grid.

Column Added to UPI – AP Invoice Export



Path: *Admin > Universal Interface*

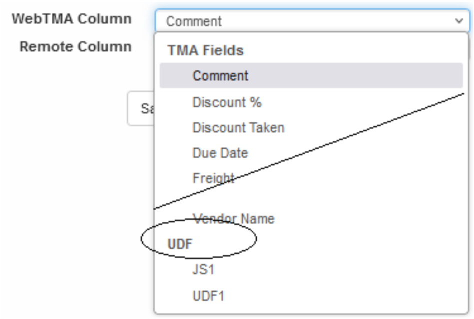
Summary: If you use the Universal Procurement Interface to export AP Invoices from WebTMA 7, you have a new Column selection.

An *Extended Cost* column has been added to the WebTMA Column selection drop-down list.

Details:

Use this field to map to your Remote Column.

UPI – AP Invoice Export Now Includes UDF Values



Path: *Admin > Universal Interface Setup / UPI – AP Invoice Export* (Transaction Type)

Summary: The *UPI – AP Invoice Export* Transaction Type for the Universal Interface module, now includes UDF fields for column selection.

Details:

Previously, the UDF fields were not available.

UPI – PO Export Has Double Quote Option

Path: *Admin > Universal Interface Setup / UPI – Purchase Order Export* (Transaction Type)

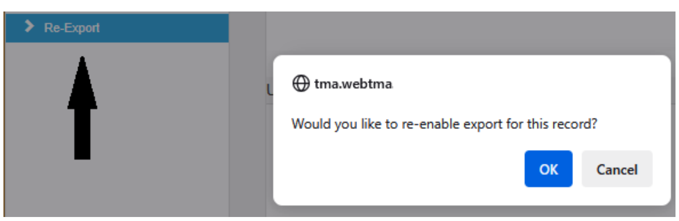
Summary: When some clients export to another application, their lines may contain commas, tabs, and special characters. This causes errors when importing to the outside application.

You now have the option to export the flat file and use double quotes if you have updated services.

Details:

Since this is not needed by most users, **updated services are required to use the enhancement**.

UPI – PO Export – Re-export



Path: *Material > Purchase > Purchase Orders*

Summary: The *Purchase Orders* window has a feature related to UPI-Purchase Order Export. If the export fails, you now have a way to re-export the files.

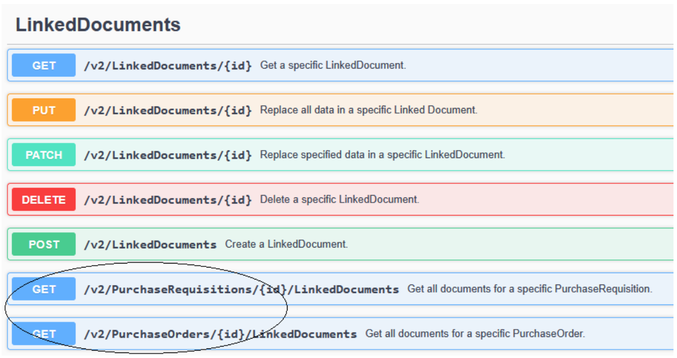
This feature is also available for UPI-Purchase Requisition Export.

Details:

A *Re-Export* link on the *Purchase Orders* window Action Menu is available when needed.

The *Re-Export* link on the *Purchase Requisitions* window Action menu has the same purpose.

API Platform – PO and PR Linked Document Endpoints



Summary: Linked Document API endpoints are now available to export documents to your accounting system.

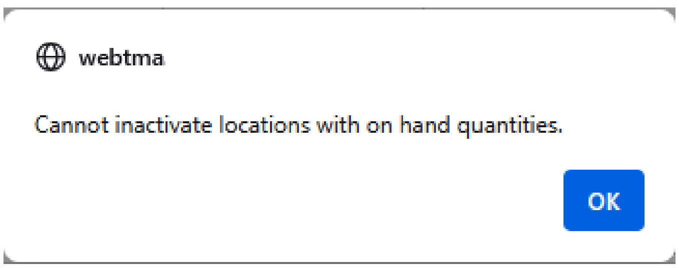
These are read-only documents that are attached to Purchase Orders and Purchase Requisitions.

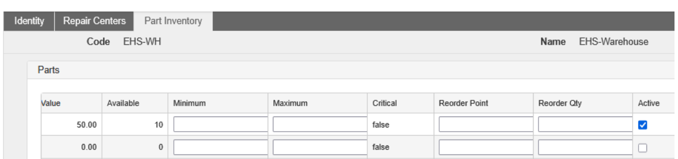
Details:

You can transfer a read-only Linked Document that is attached to a Purchase Order or Purchase Requisition using the Swagger API Platform.

These new APIs are fully described in our Swagger documentation.

Inactivate Part Lines from Warehouse Module





Path: *Material > Warehouses / Part Inventory Tab*

Summary: The *Warehouse / Part Inventory* Tab includes an *Active* column with check boxes to inactivate a SKU line that has zero (0) Parts on-hand.

Previously, a change to the check boxes on the *Warehouse / Part Inventory* Tab did not save.

Details:

Having the option to inactivate SKU lines for several line items at one time is more efficient than opening each Part record to perform the same function on the *Parts / Locations* Tab.

If you save inactivated SKU lines on either the *Warehouse* window or the *Parts* window, the action is reflected on the appropriate Tabs of both windows.

NOTE: This **does not inactivate** the entire Part record. It only affects lines on the *Part Inventory* or *Locations* Tabs with zero (0) Parts on-hand.

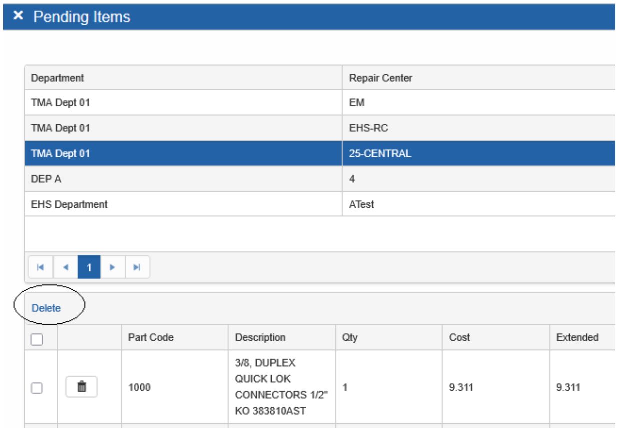
Delete Sales Order Pending Items

Summary: Sales Orders are used to sell (charge) materials to various departments within your organization. If your order exceeds the amount on hand, items are backordered.

Pending Items on the Action Menu is used to see if back-ordered items are in stock. Line items only display when stock is available.

The *Pending Items* flyout now includes an option to delete items you do not need.

Details:



Path: *Material > Sales > Sales Order*

When you select a Department in the upper grid, the back-ordered items now available are visible in the lower grid.

Check the lines you want to delete and click the *Delete* link to remove them.

Mass Import Templates for Meters

Path: *Admin > Mass Import*

Summary: Our customers continue to request enhancements to the Mass Import module, and in response, WebTMA continues to add more templates.

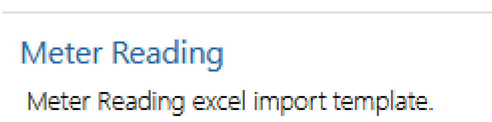
With this release, you have two new selections:

- Meter
- Meter Type

Details:

Like other Templates for Mass Import, you can download and complete the spreadsheet before creating an import.

Mass Import Template for Meter Readings



Path: *Admin > Mass Import*

Summary: Our customers continue to request enhancements to the Mass Import module, and in response, WebTMA continues to add more templates.

With this release, you can now import *Meter Readings*.

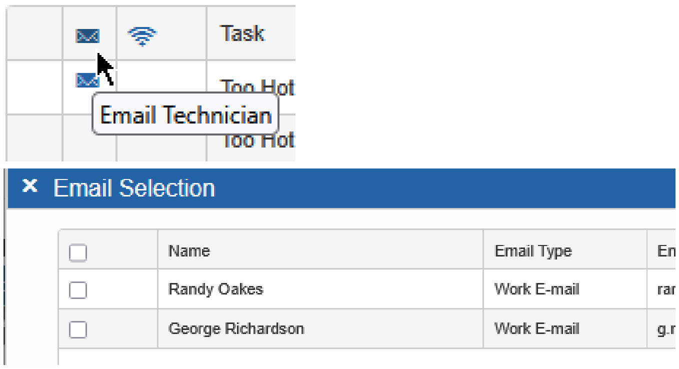
Details:

Like other Templates for Mass Import, you can download and complete the spreadsheet before creating an import.

Email Multiple Techs from WO Schedule Tab

Summary: The *Work Order / Schedule* Tab includes icons to Email details to a Technician.

When more than one Technician is assigned to the work, you can now click the icon in the heading to



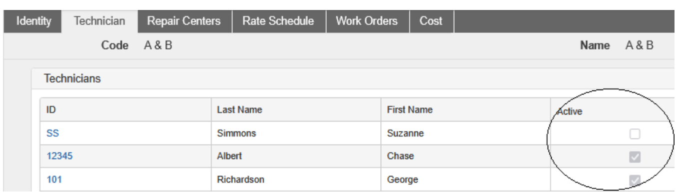
Path: *Transactions > Work Order > Records / Schedule Tab*

open a flyout window and select some or all Technicians who need to have the message.

Details:

This feature was available for those who used WebTMA v5, and it is now included in WebTMA v7 as well.

Trade Window Shows Inactive Technicians



Path: *Organization > Repair Center > Trade / Technician Tab*

Summary: The *Trade / Technician* Tab has a new *Active* column. Empty check boxes indicate an Inactive Technician. The check boxes are read-only.

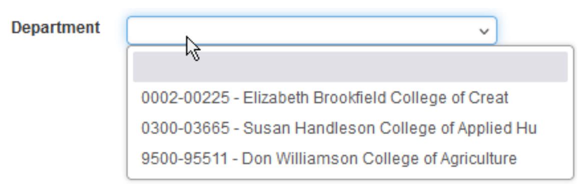
Details:

Previously, the list on the *Trade / Technician* Tab did not distinguish between Active or Inactive Technicians.

When a Technician record is marked Inactive, this is now reflected on the *Trade / Technician* Tab.

UDF Field Name Visibility Extended for Request Log

Before



After

Path: *Transactions > Request > Request Log*

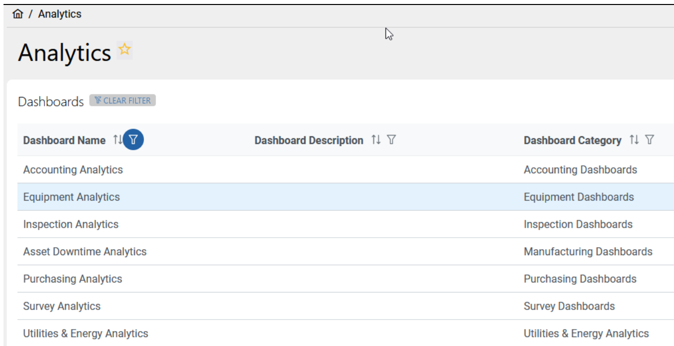
Summary: If your UDF options have very long names, you can now see the full name by hovering over the ellipsis in the drop-down list.

Previously, the selection only showed the first 50 characters although the field can allow up to 250 characters.

Details:

With this change, hover your cursor over the field and the ellipsis to see the full name in a tooltip. See illustrations at left for the “before” and “after” examples.

Analytics Grid Layout



Path: *Reports > Analytics*

Summary: For clients who purchase the Business Intelligence feature, the additional Analytics module presents a list of your reports in an easy to search grid format.

Details:

Use the Filter icon to search for Analytics and see your results.

medTester Interface for WebTMA 7

Summary: We have updated the medTester Interface to work with WebTMA version 7. Many WebTMA healthcare clients heavily use the medTester product for electrical safety testing and performance verification.

Details:

The WebTMA 7 medTester Interface performs the same functions as in version 5 with a few changes for ease of use.

NOTE: You will need to configure a TMA user account with credentials in TMA to use the medTester functionality even if you use SSO to log into the main application.

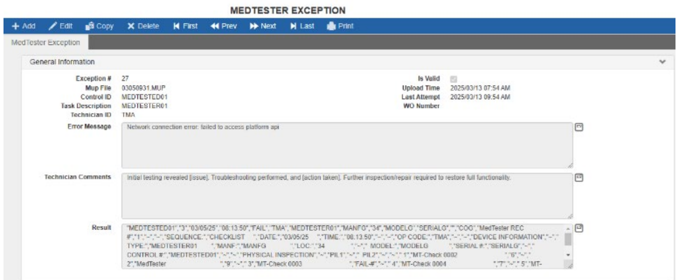
Button Functionality

A *Login to WebTMA* button has been added as a main button. This is more convenient than having it on the menu.

The *Generate Checklist / Upload to medTester* button performs the same functions as two separate buttons in the previous version ("Send All Checklists" and "Send Filtered Checklist"). You have the option to filter for certain files or simply click *Send* without filtering before uploading files. Using this button pulls checklist data from WebTMA; creates import files; and pushes the files to the medTester Device.

A **new** *Resend Check List to medTester* button is used to resubmit, when needed, the files that were uploaded using the *Generate Checklist / Upload* button described above.

To provide better understanding of the functions it performs, the *Download from medTester / Submit Results* button is a new name for "Resend Last medTester Files". It downloads check results from the



Path: *Admin > medTester Exception*

medTester Device, writes them as a file, reads the file, and submits to WebTMA.

Another new button name is *Re-Submit Results* (formerly “Upload Results”). It was renamed to make it more consistent and better explain its use. Click the button to see a prompt for a result set that has been previously generated by medTester and re-submit it to WebTMA to resolve Sync Exceptions.

Changes

When results from medTester (MUP files) are submitted to WebTMA and the entire dataset is processed without any errors or exceptions, the file is automatically moved to a Processed subfolder.

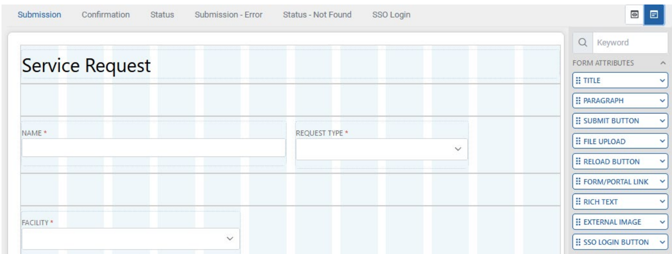
If the dataset generates errors or exceptions, the file remains where it is and a *medTester Exception* record is generated that can be seen in WebTMA (*Admin > medTester Exception*). Exception records cannot be added, edited, or deleted.

Exception records are resolved by re-submitting the results after correcting any issues. For example, missing Biomed Equipment (usually missing related to data access) or invalid data in WebTMA (wrong Tech ID, invalid task, etc.). To correct the data before resubmitting, update in either medTester or WebTMA records, depending on the source.

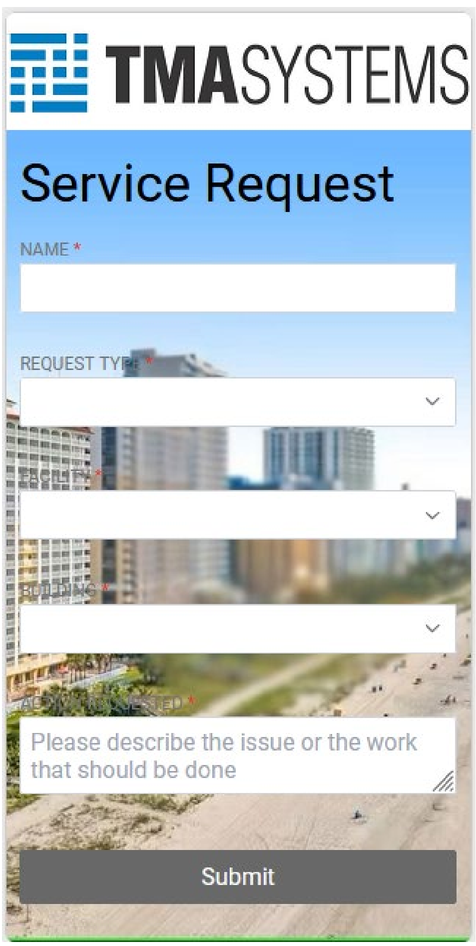
Once you resubmit data and it processes successfully, the medTester Exception record is updated as ‘Resolved’ and the *Is Valid* flag is cleared.

March 2025

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".

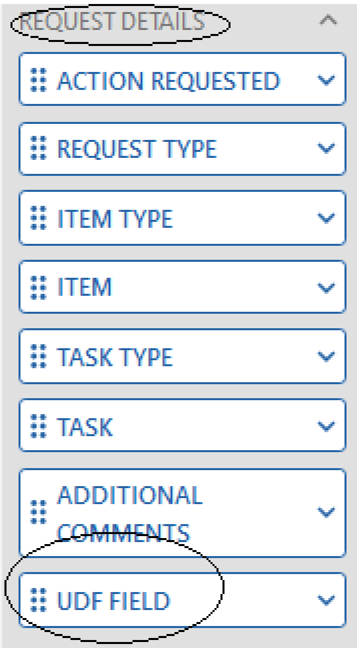
Your requestors will receive confirmation of their request and have easy access to the Status.

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.

UDF Field Block Now Available in SRP



Path: *Admin > Forms > Service Request Portal*

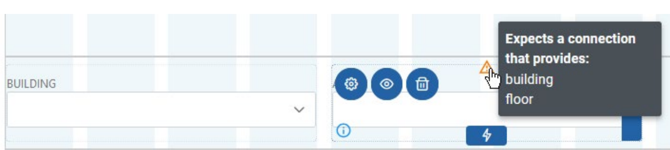
Summary: In the Service Request Portal, the *Request Details* section of the Block Palette now includes *UDF Field*.

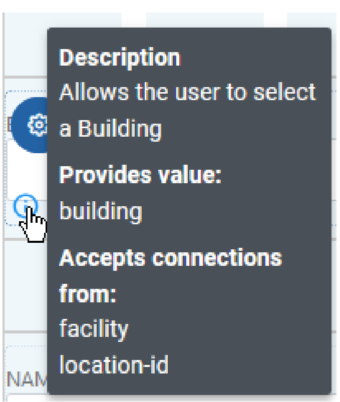
Details:

The UDF fields are those set up on the *Request Log* window. To make them available, the UDF fields must be configured from *Admin > System Form Attributes* for RequestLog.

These fields might be used to capture data needed to process the request or for the type of Form in use, such as event seating, an alternate contact, or an Account Index that is not tied to account numbers.

Hierarchy Alerts in SRP Linked Blocks





Path: *Admin > Forms > Service Request Portal-Form*

Summary: When you link Location blocks in the Service Request Portal Form, new warning ⚠ and information ⓘ icons are available to assure the needed hierarchy blocks are in your design.

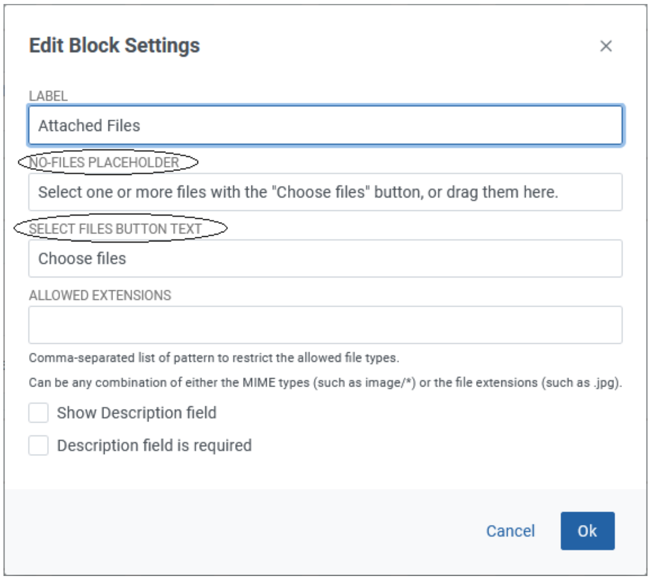
Details:

Move your cursor over the warning icon ⚠ to see a list of the connections expected by this block as illustrated at the left.

The information icon ⓘ provides details about the block such as the Building information illustrated at left.

Note that, once you have linked the blocks, you have the option to move them to other areas of your design Form.

Customize Attached Files Text in SRP



Path: *Admin > Forms > Service Request Portal*

Summary: The *Links and Attachment* section in the SRP Block Palette includes a ***File Upload*** block.

It can be edited when you want to modify the wording on the button and/or the placeholder text.

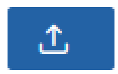
You can change the text for NO-FILES PLACEHOLDER and SELECT FILES BUTTON TEXT in the *Edit Block Settings* popup for your *File Upload* block.

Details:

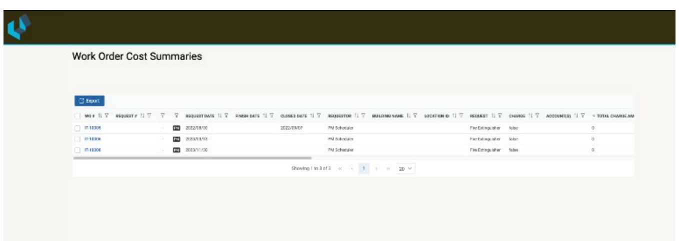
You have the option to change the text for both the button and the placeholder.

By default, the button shows *Choose files*. The Label for that section of the block palette is *Attached Files*.

If desired, you can also remove all text on the button. The remaining indicator is the upload graphic as illustrated below.



SRP Searches Block for Work Order Cost Summaries Report



Path: *Admin > Form Attributes > Service Request Portal–Searches*

Summary: The *Searches* form in the Service Request Portal (SRP) now includes a Report block named Work Order Cost Summaries.

The Report is easy to use. It provides WO costs and does not require a login to WebTMA.

Details:

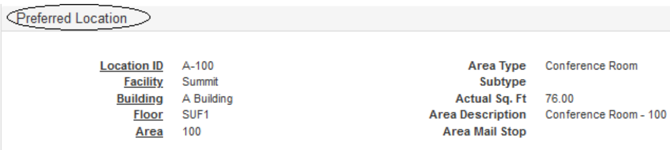
You can build an SRP *Searches* page with the report as the only component. Your regular themes are applied, and the published report resembles the illustration at the left.

The published report grid shows work order transactions with many details. Scroll across to see several cost columns. The default report is a 90-day time frame, but it can be changed.

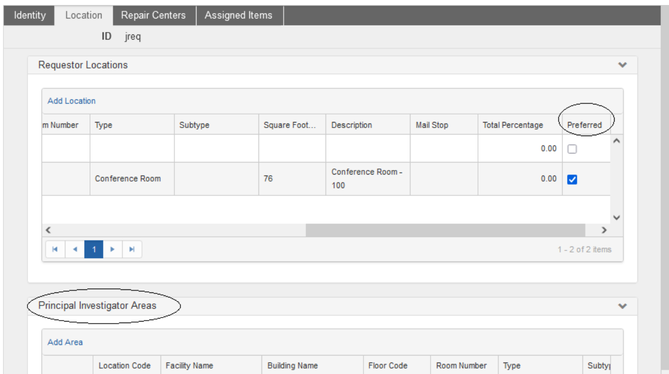
On the published report, use the filters to find lines you want. Published reports can be exported to Excel if needed.

This is our February Voice of the Customer enhancement. We would like to thank Villanova University for submitting this suggestion. We saw an opportunity to redevelop the page 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.

Improved Space Management for Requestors



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



Path: *Admin > User Management > Requestors / Location Tab*

Summary: Requestors can be associated with Areas as Occupants. Previously, Occupants could only be associated with a single Area, but now they can be associated with multiple Areas. As an example, a university professor can be associated with both an office space as well as a classroom space.

Enhancement of several windows in WebTMA now allows for a full list of people related to a space.

This gives you insights into the current landscape of your campus planning, and Requestors can quickly see all spaces that relate to them.

Principal Investigator Areas were added to provide a tracking tool of people using the space and the ability to report on that usage for reporting and recording purposes.

Details:

These changes are represented or available in the following windows:

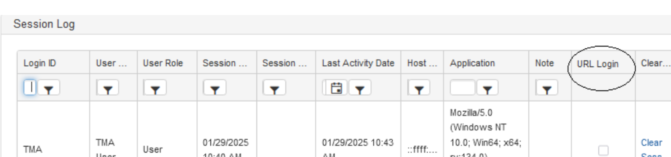
- User Management > Requestors (Identity Tab and Location Tab)
- Organization > Areas > Records / Occupants Tab
- Transactions > Request Log (auto-completes related location information assigned to the Requestor)
- Transactions > Work Order > Records (auto-completes related location information assigned to the Requestor)
- Reports > Report Writer
- Search/Find window options

The Preferred setting is made on the *Requestors / Location* Tab.

A percentage of "ownership" is determined on the *Areas / Occupants* Tab.

Once assigned, these are available in the other windows mentioned to use, search, and report on.

Client Info URL Login Usage Visible



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

Summary: A new column on the *Client Info / Session Log* Tab indicates that the session was started using a URL login.

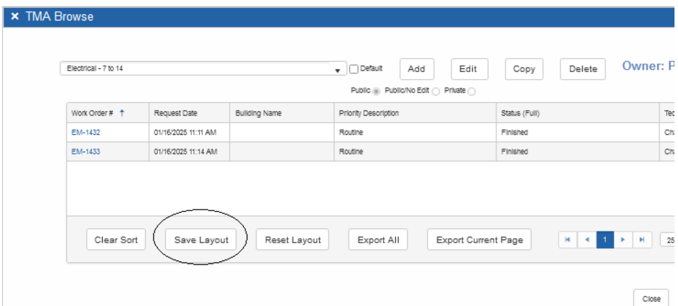
Details:

A check in the *URL Login* column shows the login lines that are attributable to a URL Login.

The information does not indicate the individual who has logged in, but it does show administrators if someone is logged in via the URL login.

Browse Panel Enhanced

Path: *Top of Navigation Panel*



Summary: Queries on the TMA Browse Panel for any window can be personalized for the logged-in user. Simply click-and-drag to resize and rearrange columns.

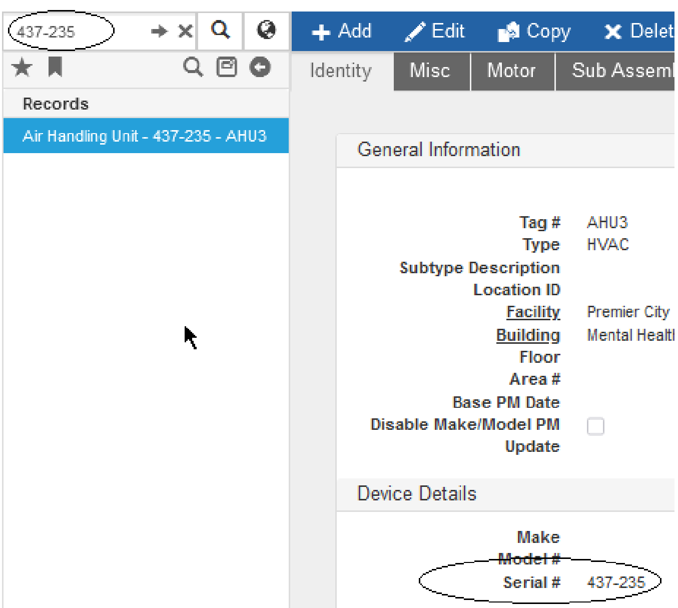
Details:

Click the *Save Layout* button to save these changes for the user; however, the default layout is still in force for others who open the Browse Panel.

Click the *Edit* button on the revised query to open the *Find* window (overlaid on your TMA Browse). On the *Display Column* Tab, you can see the default *Column Name* and *Width*.

Select the *Find* button on this window, and the grid reflects how others see this query.

Equipment Serial # Search in Fast Find



Path: *Equipment > Records*

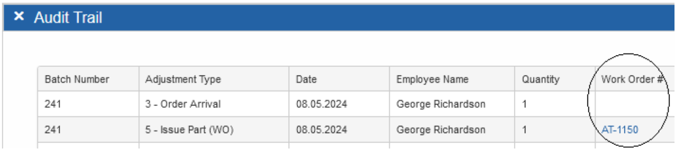
Summary: The *Fast Find – Search* field at the top of the Navigation Panel is an easy way to search for records when you know a record number (whole or partial).

On the *Equipment* window, you can now use the *Fast Find* field to search for a record by *Serial #*.

Details:

This offers the option for a quick search by *Serial #* as well as *Tag #*.

Parts Location Tab Now Has Enabled WO Link



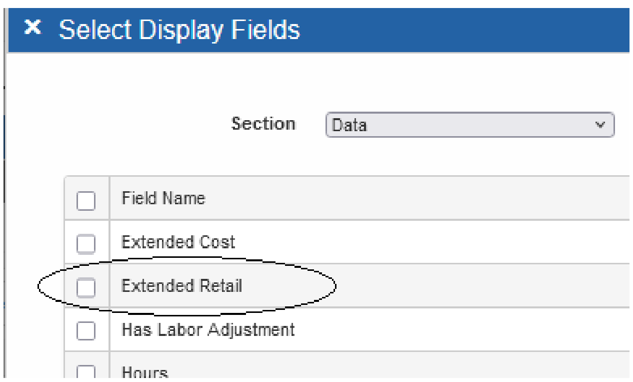
Path: *Material > Parts > Records / Locations Tab*

Summary: The *Audit Trail* flyout on the *Parts / Locations* Tab is opened when you click the  Eye icon to see all details about a Part line.

Details:

The Work Orders column on the *Audit Trail* displays all Work Orders that have the Part assigned. The Work Order # is now an enabled link so you can review the associated Work Order with one click.

Work Order Labor Extended Retail Field Available (Report Writer)



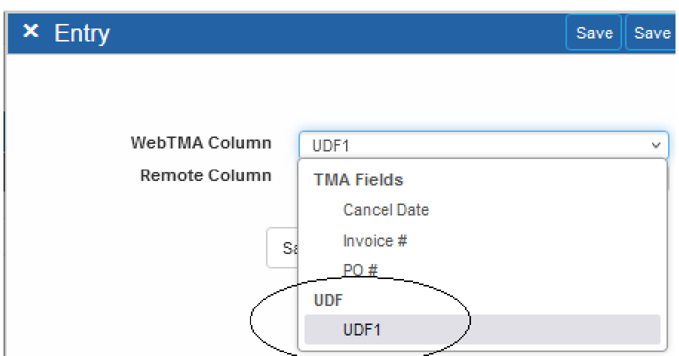
Path: *Reports > Report Writer / Report Form (Work Order Labor)*

Summary: When you create a report in *Report Writer* and select Work Order Labor for your *Report Form*, the *Extended Retail* field is now available for selection.

Details:

On the *Layout* Tab, click the *Add Field* button to open the *Select Display Fields* flyout. You can now select *Extended Retail* from the list of available fields.

UDF Now Available for UPI – AP Payment Import



Path: *Admin > Universal Interface Setup*

Summary: Use the *UPI – AP Payment Import* Transaction Type to import payment records using the Universal Interface framework.

Your UDF fields are now included on the *Add Column* flyout in the *Universal Interface Setup* window.

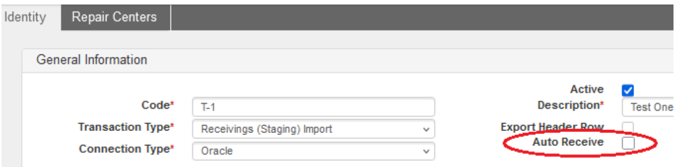
Details:

When you click the *Add Column* link to open the *Entry* flyout, you can select your UDF fields from the *WebTMA Column* drop-down list.

Be sure to add the UDF fields to *Admin > System Form Attributes* for the Purchase Order page to see the fields.

This is our January Voice of the Customer enhancement. We would like to thank Jefferson Health 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.

UI Receivings (Staging) Import Enhancement



Path: *Admin > Universal Interface Setup*

Summary: The *Receiving (Staging) Import* UI transaction is used to import Receivings from your ERP. The information is held in the database until it is approved from the *Receiving Staging* window.

However, not all clients require the extra approval action. To avoid this step, mark the new *Auto Receive* check box when the Transaction Type selection is *Receivings (Staging) Import*.

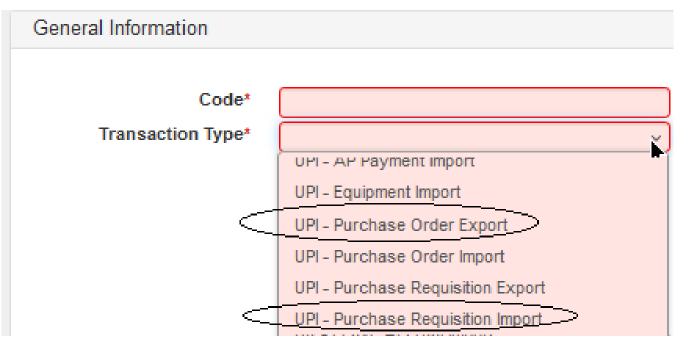
Details:

When using *Auto Receive*, you bypass the review process.

If all Parts on a Purchase Order are auto-received, the PO is automatically closed.

NOTE: The function cannot auto-receive serialized Parts.

New Selections for UPI PO and PR in Universal Interface



Path: *Admin > Universal Interface Setup*

Summary: Clients that use the WebTMA Universal Interface module sometimes have processes for importing POs and exporting PRs that differ from the usual WebTMA process.

To allow you to choose the import or export function that matches your workflow process, two new selections have been added.

Details:

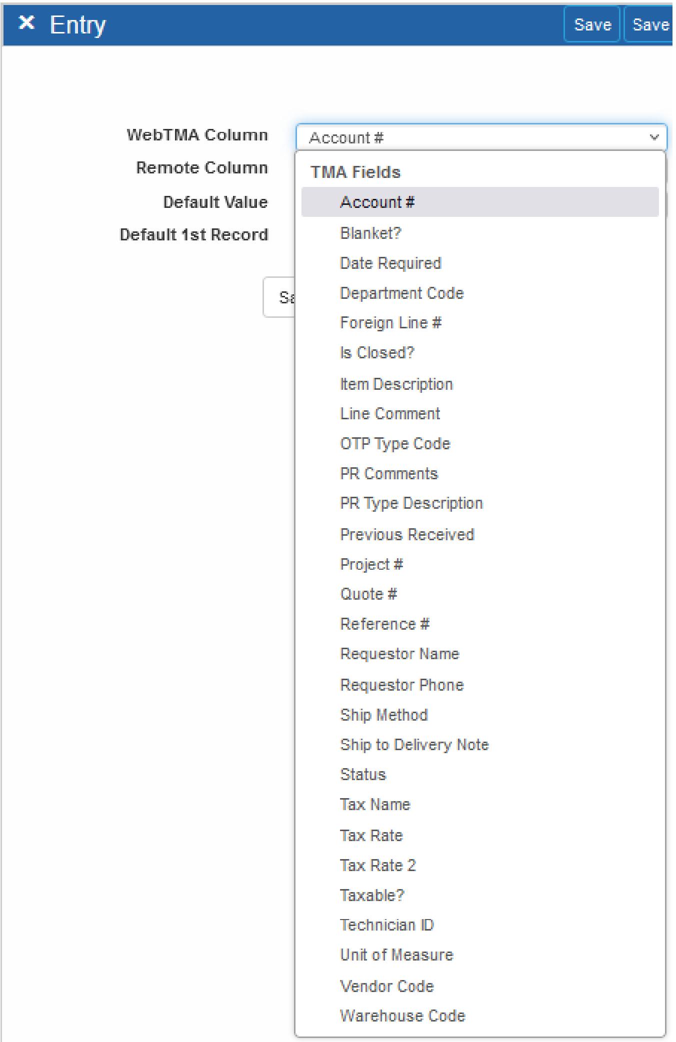
Look for the following new *Transaction Type* selections:

UPI - Purchase Order Export

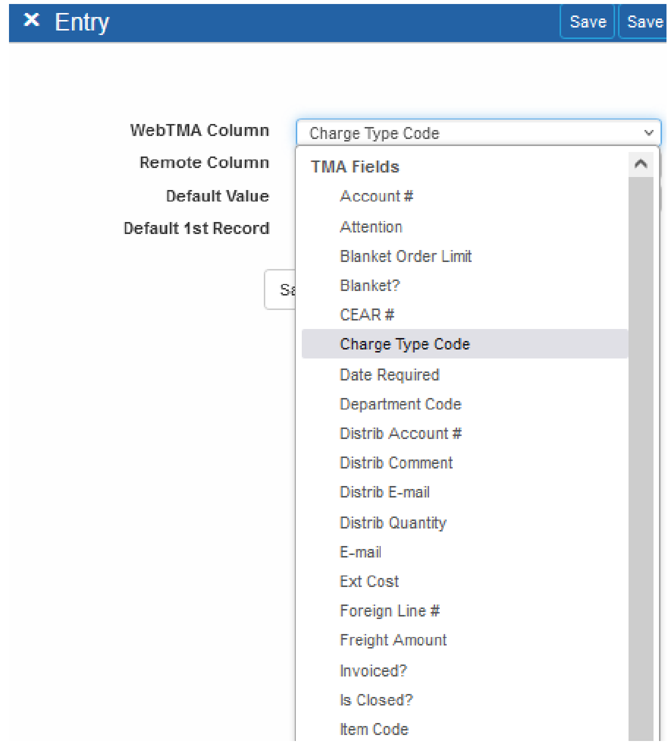
UPI – Purchase Requisition Import

The screenshots below show available fields for Purchase Requisitions Import and some of the many fields available for Purchase Order Export.

Other fields that are available for Purchase Order Export include PO#, RC Code, Line Quantity, and **UDF** fields.

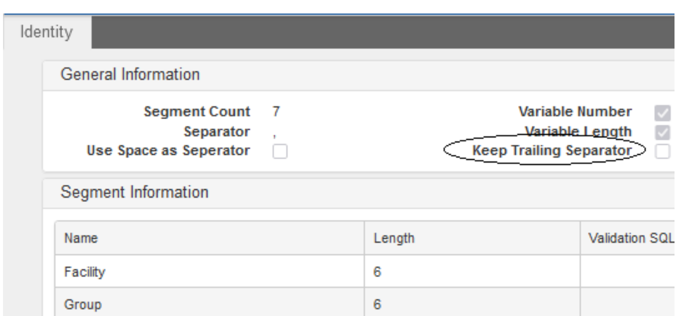


Available Fields for Purchase Requisition Import



Some of the fields available for Purchase Order Import

New UFI Setting to Retain Trailing Segment Separators



Path: *Accounting > Universal Financial > UFI Segment*

Summary: The default for the UFI Segment is to remove trailing separators from account strings; however, some users require that they be retained.

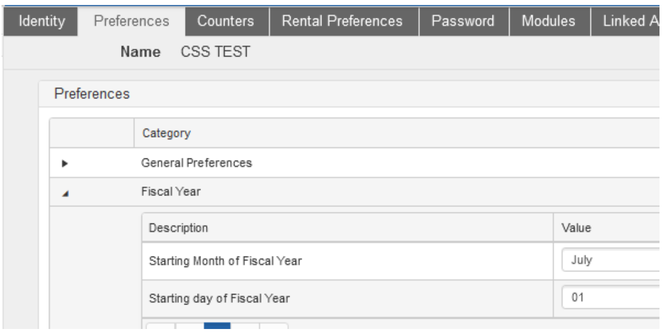
A new *Keep Trailing Separator* check box on the *UFI Segment* window gives you that option.

Details:

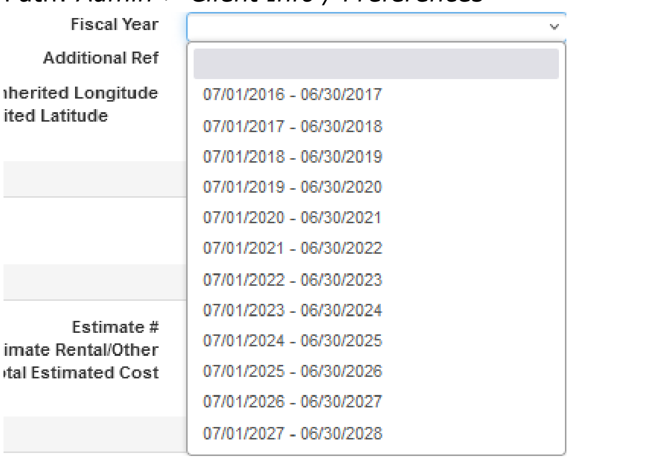
If your process requires the inclusion of trailing separators to indicate empty segments, mark this new check box.

January 2025

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:

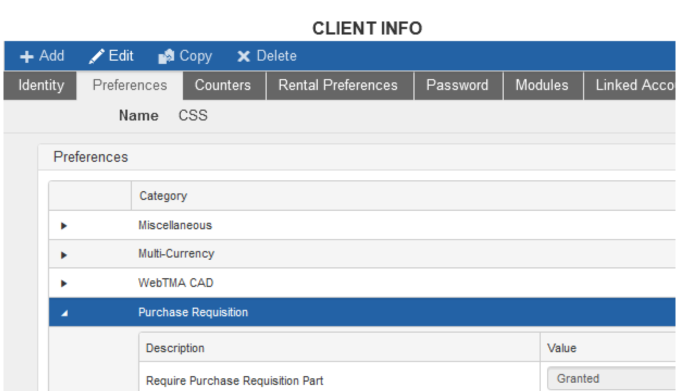
- User / Preferences
- Client Info / Preferences
- Default MM/dd/yyyy (if neither User nor Client Info settings are present)

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*.

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.

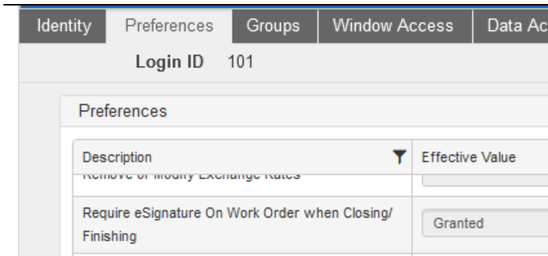
Details:

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

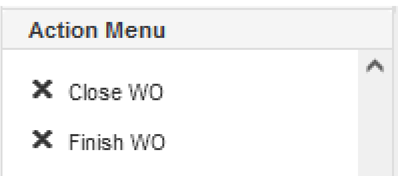
If you want to save PR records without item lines, you can **Deny** this preference.

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.

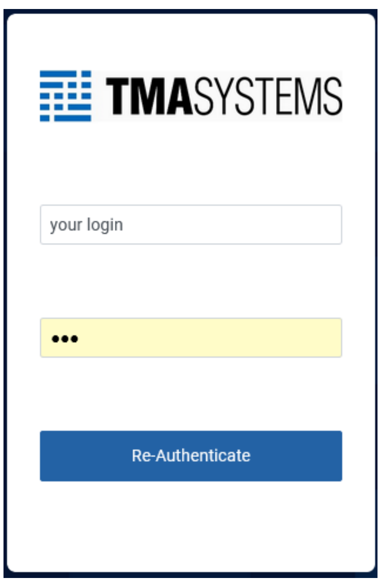
User Verification (eSignature) for Finishing/Closing WOs



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:

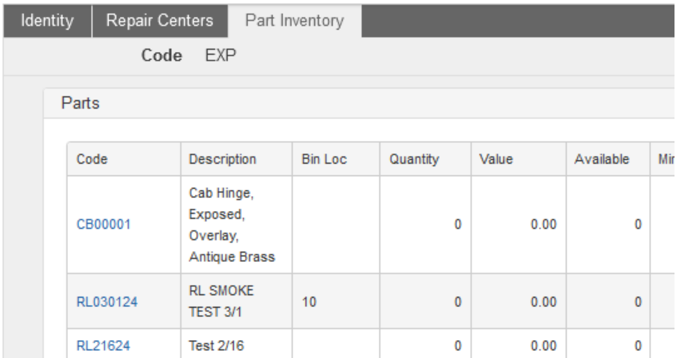
1. Complete and *Save* the work order.
2. Click *Close WO* or *Finish WO* on the Action Menu in *View* mode to open the related flyout.
3. Complete the needed fields.
4. Click *Save* on the flyout. The system refreshes and presents the Re-Authenticate login window.
5. Enter login credentials
6. Click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

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:

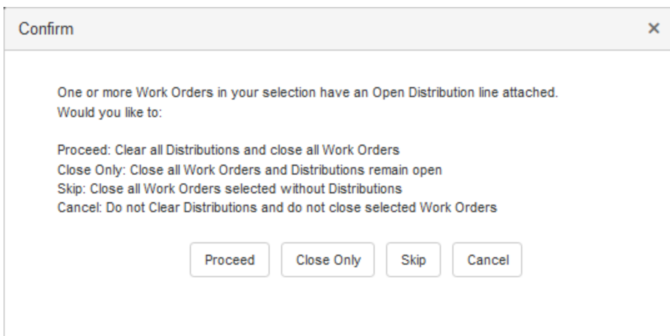
The process is easy. Open an existing Warehouse record and click *Copy* on the toolbar.

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.

Open Distribution on Batch Closed WOs Now Has Alert



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.

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.

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

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

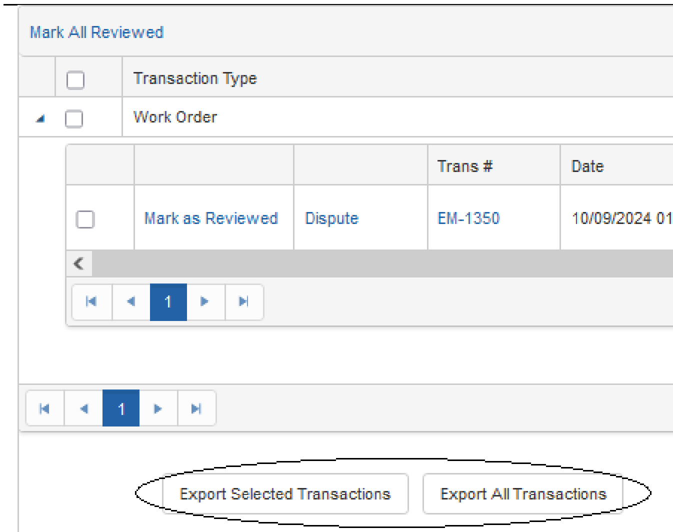
Close Only: Close all Work Orders and Distributions remain open

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*

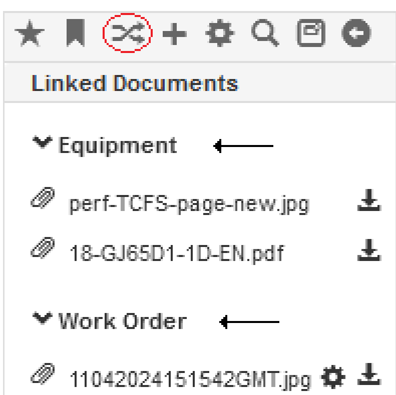
Summary: This new development for the *Pending Charges Review/Dispute* window gives you the option to export some or all the transactions.

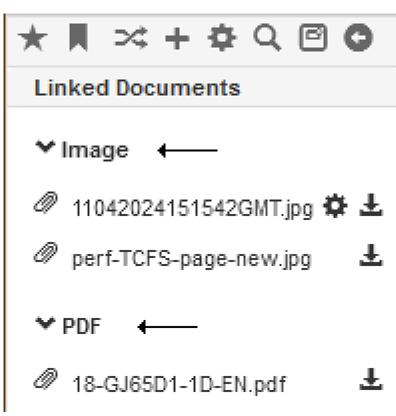
Details:

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.

Linked Documents Toggle View Feature





Navigation Panel – Linked Documents

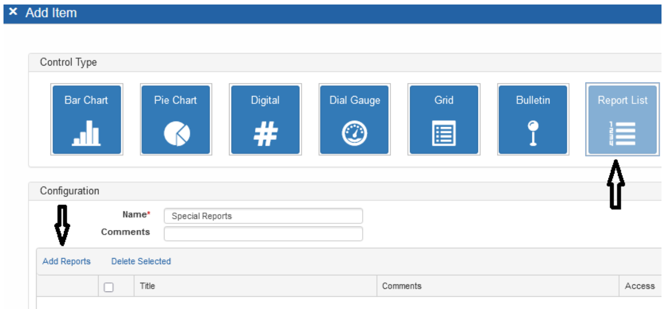
Summary: A new icon has been added to the Navigation Panel. The *Toggle Linked Documents View* icon is used to view by file type (image, .pdf, etc.) or by the record to which the files are linked.

Details:

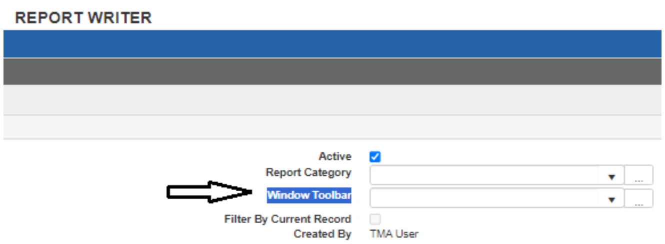
The default view categorizes files by the record they are attached to. In the first screenshot at left, two files are attached to the Equipment record and one is attached to the Work Order record.

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

Report Manager Reports Linked to Dashboard



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



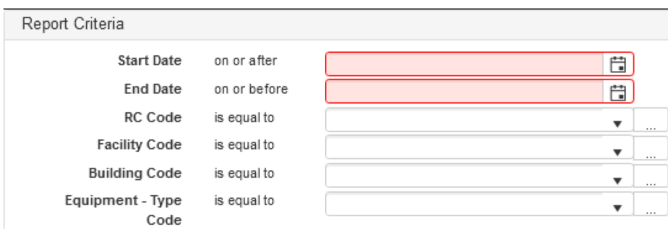
Summary: Most reports in Report Manager are now eligible for selection on the Dashboard.

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.

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*.

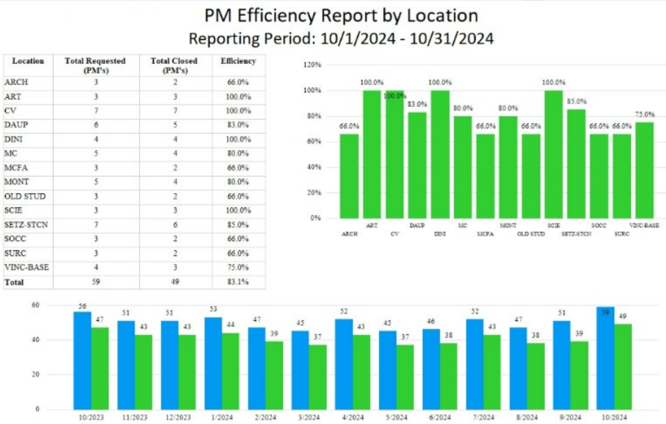
Details:

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



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:

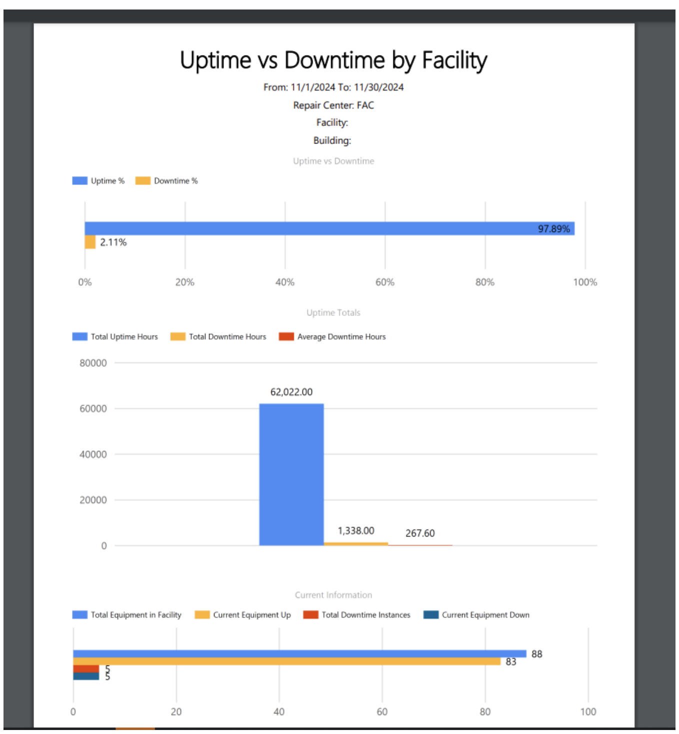
The report shows the total amount of PM's generated and the total completed within a given time range. It also displays your efficiency percentage by Building, and the totals by Building.

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.

Uptime vs Downtime by Facility Added to Report Manager



Path: *Reports > 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:

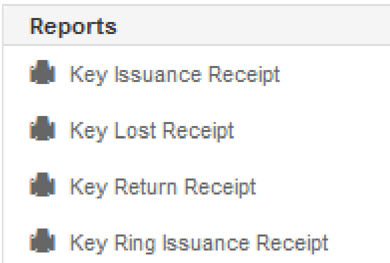
The report allows the selection of a Repair Center, a Facility, and/or Building and a Work Order date range. It displays the *Total Uptime %* vs *Total Downtime %* for the selected date range.

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.

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:

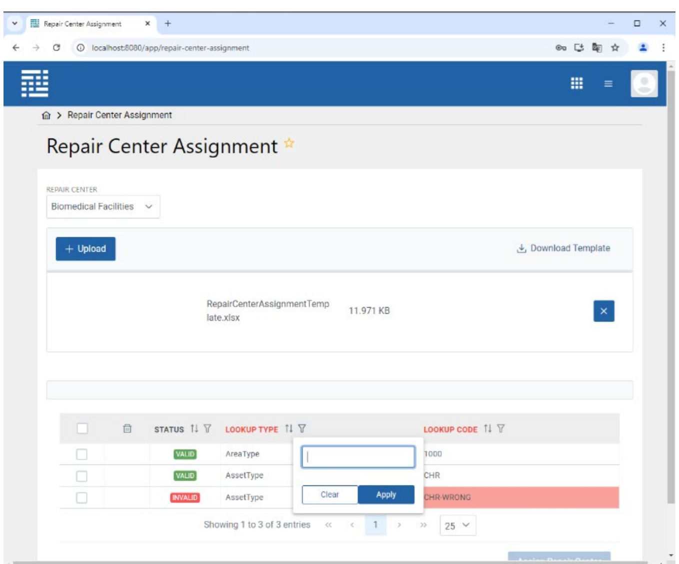
The following reports are now available:

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

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 Entries



Path: *Admin > Repair Center Assignment*

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.

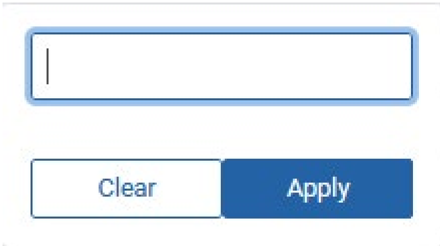
Details:

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

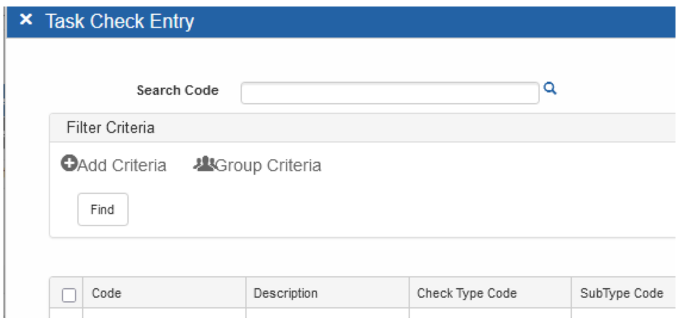
Once you have completed the Template, select a Repair Center and click the + *Upload* button on the window to select your completed Template.

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

Click the Filter icon to see a search popup.



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.

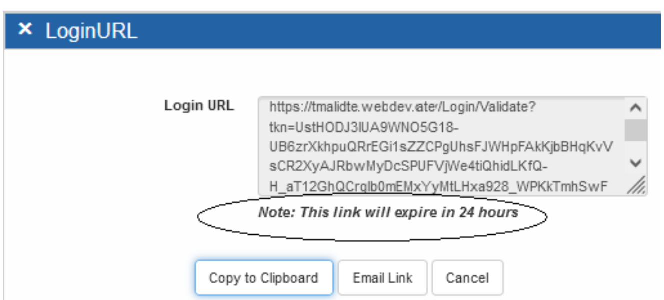
If you have numerous Master Checks (*Organization > Task > Master Check*), this enhancement gives you a way to quickly locate the records you need.

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.

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.

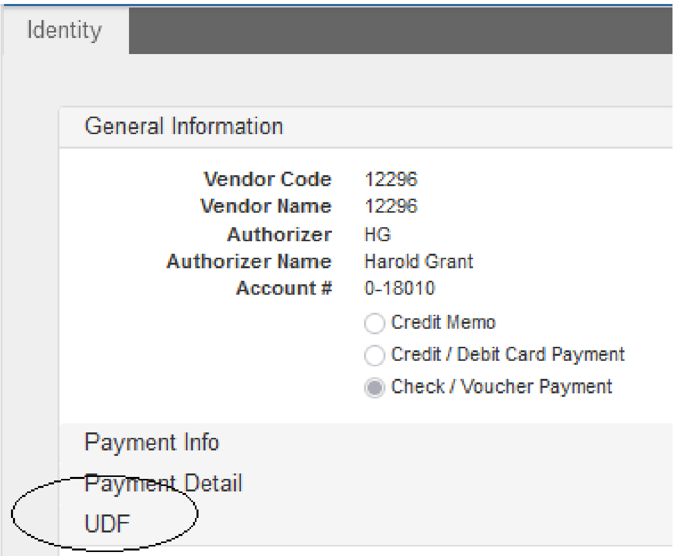
A reminder has been added to the *Login URL* flyout to remind administrators that the link expires.

Details:

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

AP Payment Window Now Includes UDF Section

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



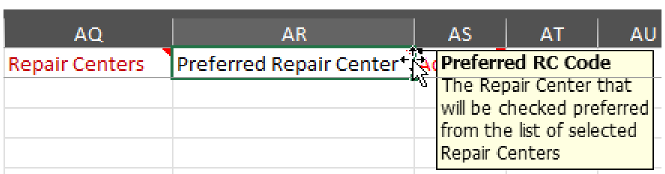
Path: *Accounting > Accounts Payable Invoice > AP Payment*

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.

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.

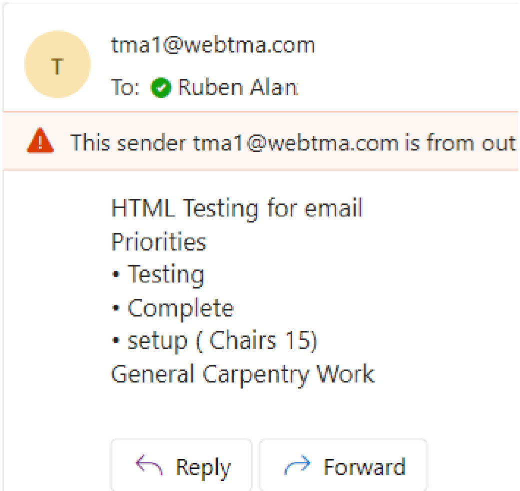
Reminder: Only one Repair Center can be entered in the Preferred Repair Center column.

Email Format Enhanced

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

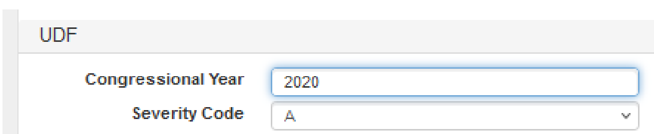
Details:

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



Example email in HTML format

Edit UDF for Accepted Inspection Findings



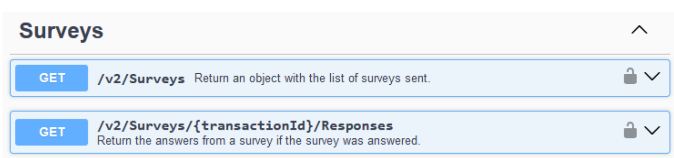
Path: *Transactions > Request > Inspection Findings*

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.

Survey Endpoints Enhanced in Swagger



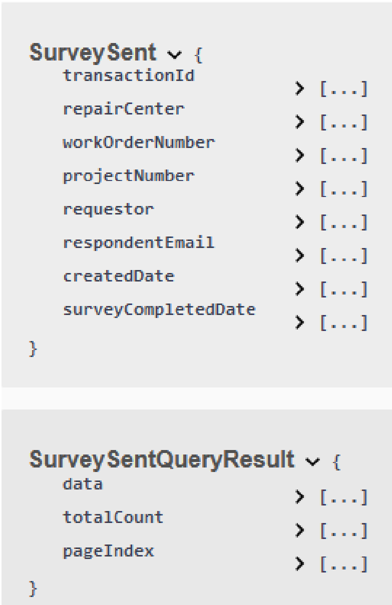
Summary: In an ongoing response to our customers' requests, we continue to enhance the endpoints.

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

Details:

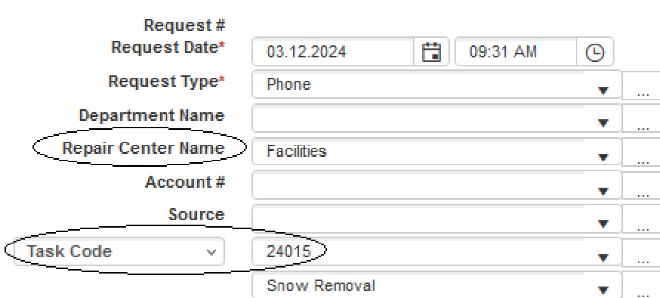
These new endpoints have been added to help retrieve data for the surveys that are sent and to see survey responses.

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



Swagger Schemas

Request Log Now Filters Tasks by Repair Center



Path: *Transaction > Request > Request Log*

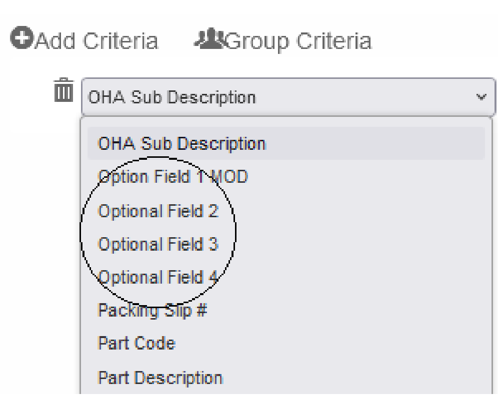
Summary: Those who use the *Request Log* window and are knowledgeable about Task Codes will find this new feature useful.

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

Details:

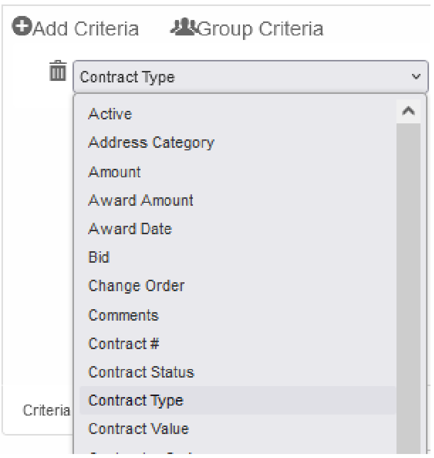
If no Repair Center is entered on the *Request Log*, Users see Task Codes for all Repair Centers to which they have access.

Criteria Added to On-Hand Adjustment Search



Path: *Materials > On-Hand Adjustments*

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.