

WebTMA Administrator 101



HARD ROCK
CASINO & HOTELS

TULSA | MAR 30 – APR 02



Introductions



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Agenda



User Management	1
User Groups	2
Adding New Technicians	3
Deactivating Technicians	4
Text Management	5
Form Attributes	6
Demo	7

User Management



Identity | Preferences | Groups | Window Access | Data Access | Mobile Access

General Information

First Name*

Last Name*

Initials*

Email

Default From Email

Phone #

Fax #

Department

Organization | **Admin** | Reports | Help

Admin

- Batch Management
- Client Info
- User Management**
- Records**
- Groups
- Requestors
- Batch Assign Repair C
- Default SSO User Set
- Text Management
- Approval Routing
- Form Attributes
- Notification & Escalation
- Dashboard Access Configu
- Alert Rule

Login ID

Please enter your username

Password

Please enter your password

Remember Me

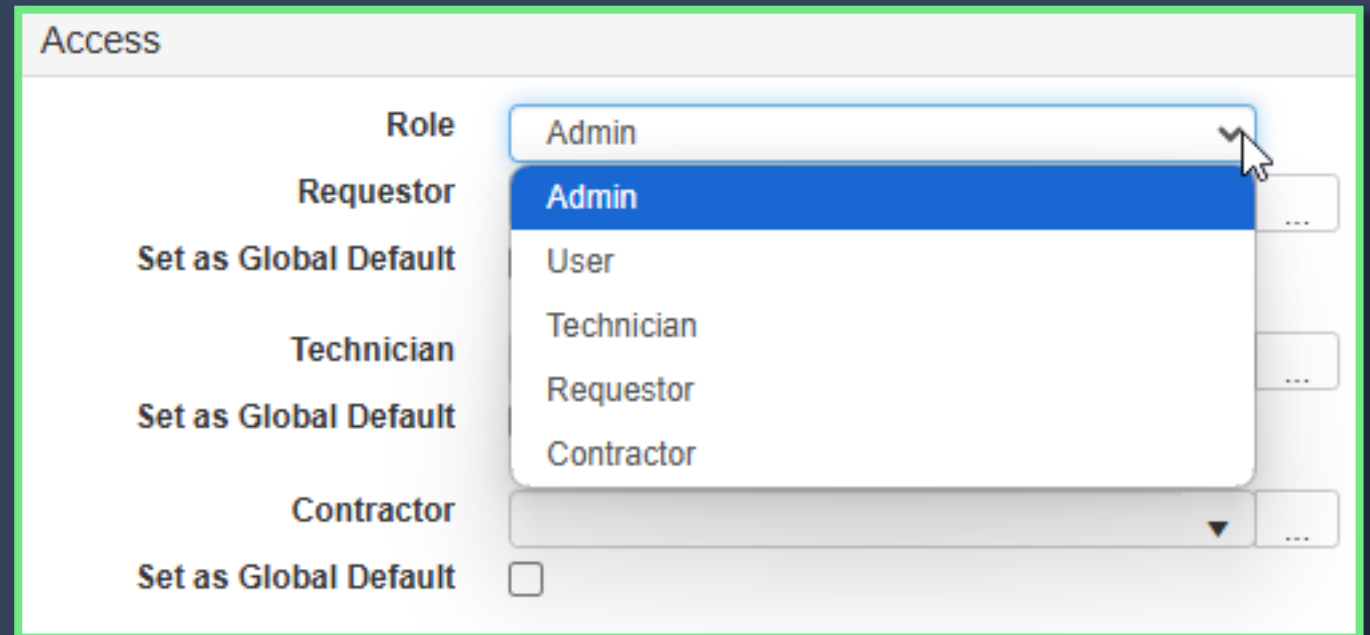
Login

Forgot Password?



User Roles

- ✔ **Admin – Super Users Only**
Can add new ADMIN level users
- ✔ **User – Most common Role**
Flexible, fits all needs
Everyday Admins to Technicians
to Read-only access
- ✔ **Technician – Very limited role**
Access only to assigned WO
- ✔ **Requestor –**
May submit Requests, no other access
- ✔ **Contractor –**
Limited to Work Orders assigned to them





License Seats & Session Timeout

The screenshot shows a web interface for 'CLIENT INFO' with the 'TOWN OF APPLEWOOD' logo. The 'Preferences' tab is selected, showing a 'Name' field with 'MMX Demo'. Below this, there are expandable sections for 'Preferences' and 'Global Settings'. The 'Session Timeout (Minutes)' field is visible with a value of '60'.

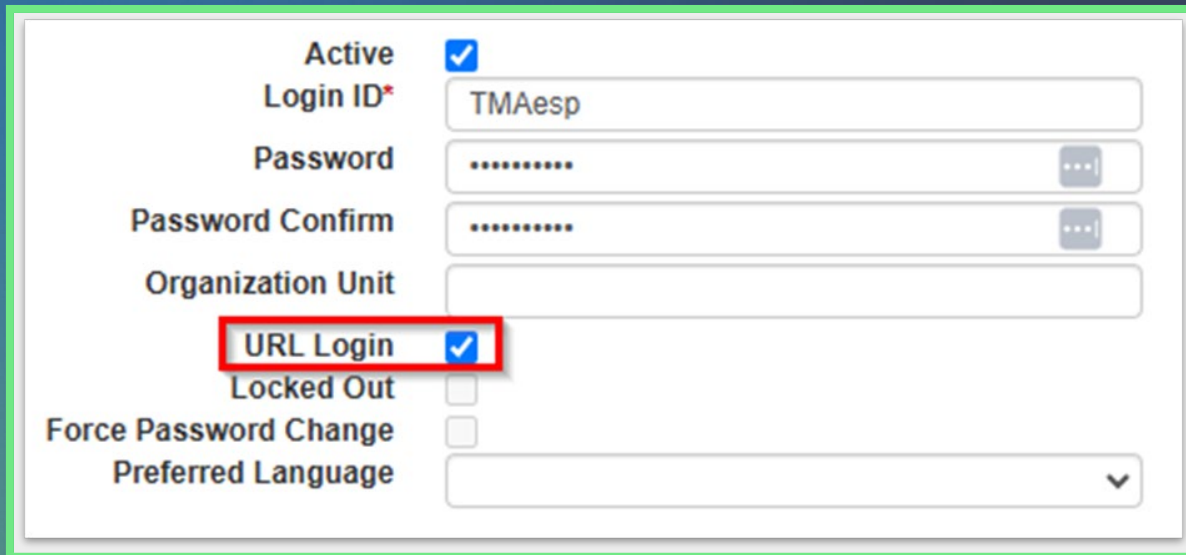
Admin > Client Info > Preferences Tab

- Users that forget to logout can't hog license seats
- 10 minutes to 2 hours (120 min)
- Limited Licenses? Lower the timeout.





URL Login

A screenshot of a user management form. The form contains several fields: 'Active' with a checked checkbox, 'Login ID*' with the value 'TMAesp', 'Password' and 'Password Confirm' with masked text and toggle icons, 'Organization Unit' with an empty text box, 'URL Login' with a checked checkbox (highlighted by a red rectangle), 'Locked Out' with an unchecked checkbox, 'Force Password Change' with an unchecked checkbox, and 'Preferred Language' with a dropdown menu. The entire form is enclosed in a light blue rounded rectangle.

Active	<input checked="" type="checkbox"/>
Login ID*	TMAesp
Password <input type="checkbox"/>
Password Confirm <input type="checkbox"/>
Organization Unit	
URL Login	<input checked="" type="checkbox"/>
Locked Out	<input type="checkbox"/>
Force Password Change	<input type="checkbox"/>
Preferred Language	

Login as the User

- Verify User access
- Analyse & correct issues
- Edit or reassign any Private or No Edit queries

Prerequisite

- Must be enabled in Client Info - Preferences



Granting Rights – Denial vs Not Determined

Value
Granted
Not Determined
Denied

Denied / None

- Supersedes all other determinations

Not Determined

- *No access* unless granted from somewhere else



Preferences Tab

The image shows a 'User Management' interface with a 'Preferences' dialog box open. The dialog box contains a table with two columns: 'Description' and 'Effective Value'. The 'Effective Value' column contains dropdown menus. Several items in both the background table and the dialog box are highlighted with red boxes.

Description	Effective Value
Default Report Format	
Default Service Request Form	Main Request Form
Delete or Modify All Documents	
Enable Fixed/Floating PM Buttons	
Generate PM	
Hide Labor Cost	
Landing Page	
Prevent Modification to Posted Transactions	
Prevent Modify Make Model from Equipment	

Background Table (User Management):

Allow to Modify Master Task	
Allow to Populate Work Order Close Date	
Allow to Populate Work Order Finish Date	
Allow to Receive Purchase Order	
Allow Unreceiving for Purchase Orders	
Allow View of Technician HR Tab	
Allow View of Technician HR Tab	
Automatically Open Print Dialog for Reports	
Batch Close Work Order	Granted
Batch Finish Work Order	
Cancel Receiving Batch	



Preferences Tab

Preferences

Description	Effective Value
Prevent WO Close Without Labor	<input type="checkbox"/>
Prevent WO Finish Without Labor	<input type="checkbox"/>
Require eSignature On Work Order when Closing/Finishing	<input type="checkbox"/>
RI-Allow Close Area	<input type="checkbox"/>
Send Manual Customer Survey	<input type="checkbox"/>
Show Complete History	<input type="checkbox"/>
Time Format (12h/24h)	<input type="checkbox"/>
Time Zone	<input type="checkbox"/>
Update Backlog from Work Order Scheduler	<input type="checkbox"/>

Navigation: < 1 2 >

Preferences

Description	Effective Value
Prevent WO Finish Without Labor	<input type="checkbox"/>
Require eSignature On Work Order when Closing/Finishing	<input type="checkbox"/>
RI-Allow Close Area	<input type="checkbox"/>
Send Manual Customer Survey	<input type="checkbox"/>
Show Complete History	<input type="checkbox"/>
Time Format (12h/24h)	12-hour (AM/PM)
Time Zone	(GMT-06:00) Central Time (US & Canada)
Update Backlog from Work Order Scheduler	<input type="checkbox"/>
Update Due Date from Work Order Browse	<input type="checkbox"/>

Navigation: < 1 2 >



Preferences Tab - Privileges

Privileges	
Description	Effective Value
Allow to Approve Time Card	Granted
Allow to Delete Meter Reading	Denied
Allow Work Order Signoff	Granted
Change Password	Granted
Allow Modification to Closed Work Orders	Denied
View Any Request	Denied
Schedule PM	Granted
Show Personal Info in Technician Window	Granted



Window Access

USER MANAGEMENT

✓ Save ✕ Cancel

Identity | Preferences | Groups | **Window Access** | Data Access | Mobile Access | Repair Centers | Managed Resources | Defaults | My Dashboard

Login ID 1

Window Access

Full | Add/Edit | Add | Edit | Read Only | None | Not Determined

Admin	Not Determined	Not Determined	Not Determined
Alert Rule	Not Determined	Full	Not Determined
Archive and Purge	Not Determined	Add/Edit	Not Determined
Auto-Schedule Rule	Not Determined	Edit	Not Determined
Batch Management	Not Determined	Add	Not Determined
BIM Template Setup	Not Determined	Read	Not Determined
Client Info	Not Determined	None	Not Determined
Dashboard Access Configuration	Not Determined	Not Determined	Not Determined



Window Access

Work Order	Mixed
Authorization	None
Individual Billing	None
Requested Part Browse	Add
Work Order	Full
Work Order Browse	Add



Data Access


	Effective	User-Level	Group-Level
▶ ADMIN - ADMINISTRATIVE ANNEX	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
▶ AH - ASTOR HOUSE	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
▶ CC - COMMUNITY CENTER	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
CEM - Cemetery	Granted	Granted	Not Determined
▶ CH - CITY HALL	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
▶ FLEET - FLEET SHOP	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
▶ FS - Fire Stations	Granted	Granted	Not Determined <input type="button" value="Propagate Access"/>
FS4 - FIRE STATION 4	Granted	Granted	Not Determined

NOTE:
When adding new Buildings, Facilities, or higher-level locations, access must be Granted or Users will not see the new spaces.



Data Access – Repair Centers

USER MANAGEMENT

 **APPLEWOOD**
A DELICIOUS PLACE TO LIVE

✓ Save ✗ Cancel

IdentityPreferencesGroupsWindow AccessData AccessMobile AccessRepair CentersDefaultsMore ▾

Login ID AKB

Organization Access >

Repair Center Access ▾

Grant AllDeny AllNot Determined All

Add Repair CenterDelete Selected

		Repair Center Code	Repair Center Name	Effective	User-Level	Group-Level
<input type="checkbox"/>	<input type="checkbox"/>	TOA	Town of Applewood		Granted ▾	▲



Data Access – Repair Centers

USER MANAGEMENT

✓ Save ✕ Cancel

Identity | Preferences | Groups | Window Access | **Data Access** | Mobile Access | Repair Centers | Defaults | My Dashboard | API Roles

Login ID AKB

Organization Access
Repair Center Access ←

Grant All Deny All Not Determined All

Add Repair Center Delete Selected

<input type="checkbox"/>	Repair Center Code	Repair Center Name	Effective	User-Level	Group-Level
<input type="checkbox"/>	TOA	Town of Applewood		Granted	

Data Access Tab
What RC's they can see

+ Add Edit Copy Delete First Prev Next Last Print

Identity | Preferences | Groups | Window Access | **Data Access** | Mobile Access | **Repair Centers** | Defaults | My Dashboard

Login ID AKB

Repair Center


Code
TOA

Repair Centers Tab
Who can view this Record



Data Access – Repair Centers

USER MANAGEMENT

 **APPLEWOOD**
A DELICIOUS PLACE TO LIVE

✓ Save ✗ Cancel

IdentityPreferencesGroupsWindow AccessData AccessMobile AccessRepair CentersDefaultsMore ▾


Login ID AKB

Organization Access >

Repair Center Access ▾

Grant AllDeny AllNot Determined All


Add Repair CenterDelete Selected

		Repair Center Code	Repair Center Name	Effective	User-Level	Group-Level
<input type="checkbox"/>		TOA	Town of Applewood		Granted ▾	▲



Data Access – Repair Centers

USER MANAGEMENT

 **APPLEWOOD**
A DELICIOUS PLACE TO LIVE

✓ Save ✗ Cancel

IdentityPreferencesGroupsWindow AccessData AccessMobile AccessRepair CentersDefaultsMore ▾

Login ID AKB

Organization Access >

Repair Center Access ▾

Grant AllDeny AllNot Determined All

Add Repair CenterDelete Selected

		Repair Center Code	Repair Center Name	Effective	User-Level	Group-Level
<input type="checkbox"/>	<input type="checkbox"/>	TOA	Town of Applewood		Granted ▾	



Data Access

Warehouse Access

Grant All Deny All Not Determined

Add Warehouse Delete Selected

<input type="checkbox"/>	Warehouse Code
<input type="checkbox"/>	MAIN

Report Categories

Grant All Deny All Not Determined All

	Effective	User-Level	Group-Level
▾ All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adhoc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▸ Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▸ Material	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
My Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Defaults

USER MANAGEMENT

✓ Save ✕ Cancel

Identity | Preferences | Groups | Window Access | Data Access | Mobile Access | Repair Centers | **Defaults** | M

Login ID TMAesp

Default Values

Add Default

Window	Page

✕ Default Entry

Window WorkOrder ▾

Page Select Repair Center ▾

Field Repair Center Name ▾

Default Value Town of Applewood ▾

Save Cancel



My Dashboard tab

- “Add Tab” to include additional boards
- **View and Edit checkboxes**
- **Arrows** rearrange the order in which tabs appear

			Name	Description	View	Edit	Group View	Group Edit
<input type="checkbox"/>	↑ ↓		RequesterDash		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	↑ ↓	<input type="checkbox"/>	Maintenance		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	↑ ↓	<input type="checkbox"/>	Carpentry		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	↑ ↓	<input type="checkbox"/>	PM Management		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



User Groups

GROUPS

+ Add Edit Copy Delete First Prev Next Last Print

Identity Window Access Data Access Mobile Access Repair Centers Preferences Defaults My Dashboard

General Information

Name	WA-SUP	Description	WA-Maint Supervisors
-------------	--------	--------------------	----------------------

Users

Login	First Name	Last Name	Initials	Phone	Email
JPost	JP	Post	JP		jpost@toa.gov
RGold	Ronnie	Gold	RG		rgold@toa.gov
AKB	Amanda	Burczyk	AKB		amanda.burczyk@tmasystems.com

Dashboard Access Configuration

Alert Rule



Group Types

Group Types

- **DA – Data Access**
- **WA – Window Access**
- **PS – Position Based Access**
- **WH – Warehouse Access**
- **DB – Dashboard Access**

Window Access

Position based

Consider the bare minimum for the User's needs

Use Not Determined instead of None

Grant Window Access ONLY

Create WA group for Key Management, Mobile Access, etc.

Stack Groups to provide tailored access



User Groups – Best Practices

Group Types

- DA – Data Access
- WA – Window Access
- PS – Position Based Access
- **WH – Warehouse Access**
- **DB – Dashboard Access**

Add-On Groups

Warehouses

Dashboards

Key Management

Materials Management

Mobile Access

Stack ‘em up!



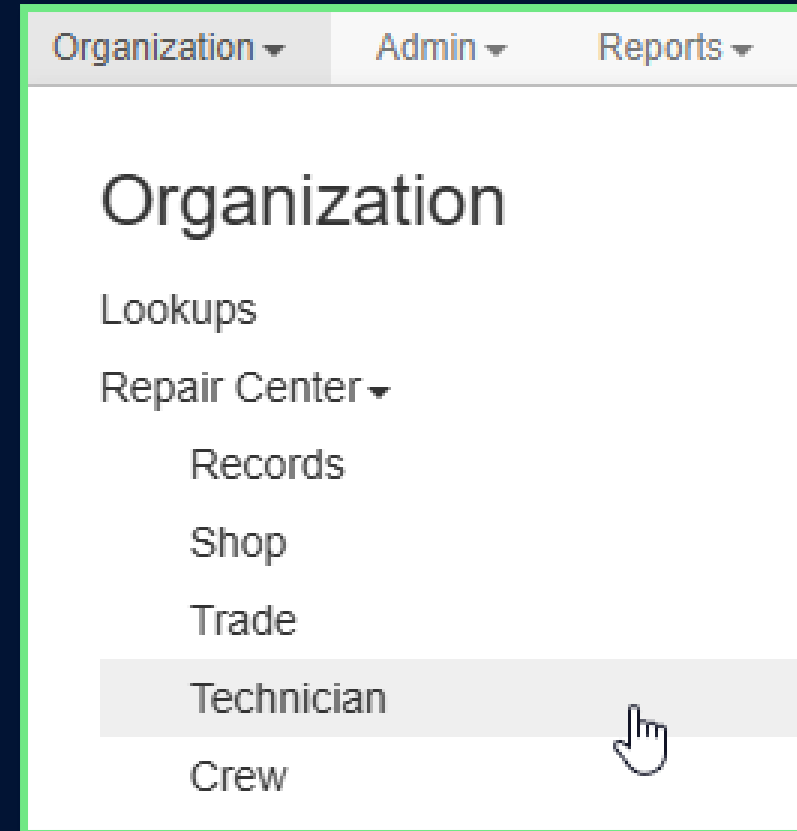
Adding a New Technician

Technician Record

Organization >

Repair Center >

Technician





Adding a New Technician

ID*	<input type="text" value="123456"/>
First Name*	<input type="text" value="Axel"/>
Last Name*	<input type="text" value="Rose"/>
Shift *	<input type="text" value="101"/>
Driver	<input type="checkbox"/>

+ Add

Active	<input checked="" type="checkbox"/>
Title	<input type="text" value="Maintenance Tech I"/>
Charge Rate*	<input type="text" value="20.00"/>
Account #	<input type="text"/>
MobileTMA Days	<input type="text"/>
Supervisor	<input type="checkbox"/>

Technician Record

+ Add

- ID – Badge #, Employee ID, etc.
- First/Last Name, Shift
- Charge Rate – For calculating Labor Costs
 - Can use a general amount like 20 or 30
- Supervisor + Trades = Landing Page

Adding a New Technician

Trades Grid

- Required
- Can add multiple

Supervised Techs

- Aids Supervisors in seeing their crews' work loads

The screenshot shows a software dialog box titled "Trade Entry". It features a table with the following columns: "Trade Code", "Trade", and "Charge Rate". There are six rows of data, each with a checkbox in the first column. Below the table is a large empty area, and at the bottom, there are navigation buttons and two "Add Selected" and "Cancel" buttons.

<input type="checkbox"/>	Trade Code	Trade	Charge Rate
<input type="checkbox"/>	CON	Contractor	
<input type="checkbox"/>	ELEC	Electrical	
<input type="checkbox"/>	HVAC	HVAC	
<input type="checkbox"/>	MAINT	Maintenance	
<input type="checkbox"/>	PLUM	Plumbing	



Adding a New Technician

HR Tab

- DL information
- Emergency Info!!!

Repair Centers

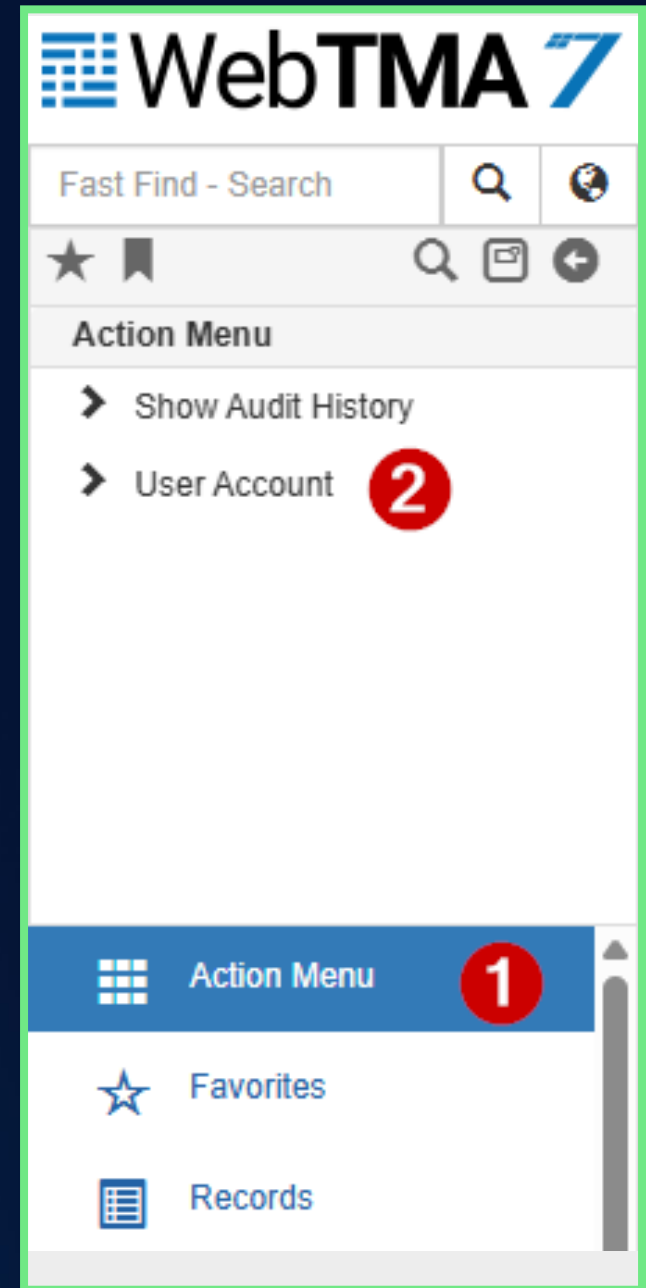
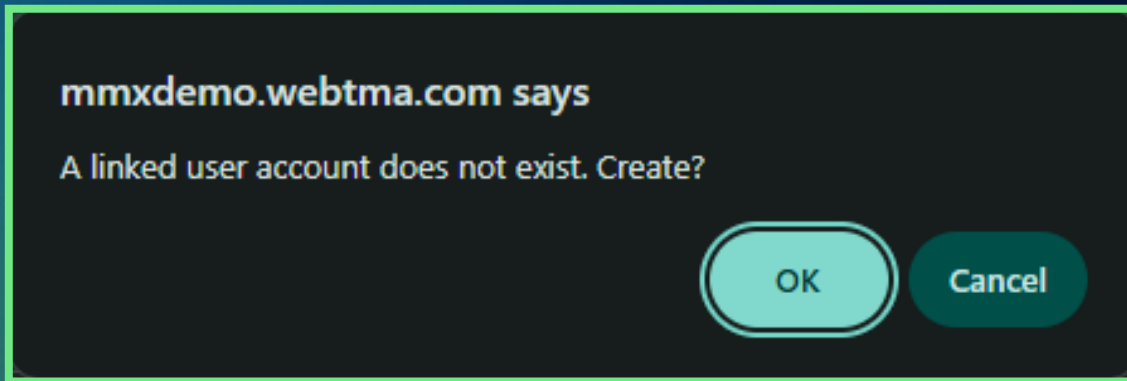
- Required

Save !

Identity	HR	Checkout	PPE	Training	Costs	Facilities	Repair Centers	Work Orders
ID 123456		Name Axel Rose						
General Information								
Start Date	<input type="text"/>	End Date	<input type="text"/>					
Driver's License #	<input type="text"/>	Badge	<input type="text"/>					
Last Action	<input type="text"/>	DL Expires	<input type="text"/>					
Budget Code	<input type="text"/>	Hourly Pay Rate	<input type="text"/>					
Personal Information								
Address 1	<input type="text"/>	Phone	<input type="text"/>					
Address 2	<input type="text"/>	Cellular	<input type="text"/>					
City/State/Zip	<input type="text"/>	Birth Date	<input type="text"/>					
Sex	<input type="text"/>	Veteran	<input type="checkbox"/>					
Ethnicity Description	<input type="text"/>	Immunization Sched	<input type="text"/>					
Citizenship Status	<input type="text"/>	Height	<input type="text"/>					
Last Physical	<input type="text"/>	Weight	<input type="text"/>					
Emergency Contact Information								
Emergency Contact	<input type="text"/>	Emergency Phone	<input type="text"/>					
Relation	<input type="text"/>	Blood Type	<input type="text"/>					
Allergies	<input type="text"/>							

Creating and Linking a User

- Open the Action Menu
- Click the *User Account* link
- Click OK





Creating the User

- Name and initials are pre-filled
- Update the Login ID and password
- Email
- Role
- **Technician**
- Repair Centers tab

The screenshot shows a user creation form with two main sections: 'General Information' and 'Access'. Red boxes highlight the following fields:

- General Information:**
 - First Name* (Axel)
 - Last Name* (Rose)
 - Initials* (AR)
 - Active (checked)
 - Login ID* (tma)
 - Password (masked with dots)
 - Password Confirm (masked with dots)
- Access:**
 - Role (Technician)
 - mobileTMA (checkbox)
 - Technician (Axel Rose)

Other visible fields include: Email, Phone #, Fax #, Department, Last Activity, Requestor, Set as Global Default, Contractor, URL Login, Locked Out, Force Password Change, Preferred Language, and Organization Unit.



User – Groups Tab

Groups tab

- DA Group
- WA Group (or PS Group)
- Additional special groups (optional)

GroupEntry Add Selected Cancel

<input type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	DA-FULL	DA-All Locations
<input type="checkbox"/>	DA-GEN	DA-General Non-Secure Locations
<input type="checkbox"/>	DA-SEC	DA-Secure Access Locations
<input type="checkbox"/>	Dispatcher	Admin
<input type="checkbox"/>	Proteus	Admin
<input checked="" type="checkbox"/>	WA-Reporting	WA- Facility/Operations Reporting
<input checked="" type="checkbox"/>	WA-SUP	WA-Maint Supervisors
<input type="checkbox"/>	WA-Tech	WA- Technicians
<input checked="" type="checkbox"/>	WA-Warehouse	WA-Warehouse

1 - 9 of 9 items

⏪ ⏩ 1 ⏪ ⏩

Add Selected Cancel



Deactivating Technicians

- 01 Reassign Work Orders w/ Scheduling Tool
- 02 Reassign PM's w/ Batch PM Update
- 03 Deactivate the Technician Record
- 04 Deactivate the User Record and remove additional licenses



Reassign WOs with Scheduler

Quick Filter


Technician ID ▼ ...
Technician Name ▼ ...
Trade ▼ ...
Shift ▼ ...
Technician Zone ▼ ...
Time Frame ▼



Repair Center ▼ ...
Work Order Type ▼ ...
Shop ▼ ...
Building Name ▼ ...
Department Name ▼ ...
Priority ▼ ...

<input checked="" type="checkbox"/>				Work Order #	Technician	Start Date	Task Code	Task Description	Est. Hours	Request
<input checked="" type="checkbox"/>		<input type="text" value="✍"/>	<input type="text" value="🗑"/>	WO-110232	14791 - JP Post	06/11/2025 12:56 PM	PM-02	Clean Coils in equipment	0.25	Prep for summer Change all Filters Clean Coils in equipment
<input checked="" type="checkbox"/>		<input type="text" value="✍"/>	<input type="text" value="🗑"/>	WO-110257	14791 - JP Post	06/11/2025 12:56 PM	PM-10	Waterless Urinal	0.79	Waterless Urinal
<input checked="" type="checkbox"/>		<input type="text" value="✍"/>	<input type="text" value="🗑"/>	WO-110233	14791 - JP Post	06/11/2025 12:56 PM	PM-02	Clean Coils in equipment	0.25	Prep for summer Change all Filters Clean Coils in equipment
<input checked="" type="checkbox"/>		<input type="text" value="✍"/>	<input type="text" value="🗑"/>	WO-110234	14791 - JP Post	06/11/2025 12:56 PM	PM-02	Clean Coils in equipment	0.25	Prep for summer Change all Filters Clean Coils in equipment



Reassign WOs with Scheduler









Fast Find - Search 

Action Menu

- > Open Scheduler
- > Show Backlog
- > Print
- > Remove Technician
- > Replace Technician**
- > Unassign Work Order
- > Complete Schedule
- > Shift Schedule

Start Date 01/01/2025
End Date 12/31/2025
[Switch to Calendar](#)

		Work Order #	Tec
		WO-110232	14
		WO-110257	14
		WO-110233	14
		WO-110234	14

Replace Technician Save Cancel

Technician Code* 22536 ▼ ...

Technician Name* Marco Polo ▼ ...

Save Cancel



Reassign PMs with Batch PM Update

Admin ▾ Reports ▾ Help ▾

Admin

- Batch Management
- Client Info
- User Management ▾
- Text Management
- Form Attributes ▾
- Dashboard Access Configuration
- Notification & Escalation
- Alert Rule
- GIS Map
- Batch PM Update**
- Email Settings
- Mass Import ▾
- Repair Center Assignment

+ Add Criteria 👤 Group Criteria

🗑 Technician Name contains joe

🗑 Technician Name is equal to Marco Polo ...

Query

List Results Reset Criteria Save Query Save Query As Cancel

No Query Selected

+ Add Criteria 👤 Group Criteria

🗑 Technician Name contains joe

🗑 Technician Name is equal to Marco Polo ...

Criteria Display Column

List Results Reset Criteria Save Query Save Query As Cancel



Reassign PMs with Batch PM Update

General Information

New Browse Selection

<input checked="" type="checkbox"/>	Item Tag	Item Type	Task Description	Task Code	WO Type	Trade Description	Technician Name	Building Name
<input checked="" type="checkbox"/>	PD	Facility	Fire Extinguisher Check	PM-04	Preventive Maintenance	Maintenance	Marco Polo	
<input checked="" type="checkbox"/>	PD	Facility	Fire Extinguisher Replacement	PM-FE-04	Preventive Maintenance	Maintenance	Marco Polo	
<input checked="" type="checkbox"/>	PD-DAC	Equipment	Change belts & grease bearings	PM-03	Preventive Maintenance	Maintenance	Marco Polo	POLICE DEPARTMENT
<input checked="" type="checkbox"/>	PD-EWS	Equipment	Inspect Eyewash station	PM-08	Preventive Maintenance	Maintenance	Marco Polo	
<input checked="" type="checkbox"/>	PW	Facility	Waterless Urinal	PM-10	Preventive Maintenance	Maintenance	Marco Polo	
<input checked="" type="checkbox"/>	PW	Facility	Fire Extinguisher Check	PM-04	Preventive Maintenance	Maintenance	Marco Polo	
<input checked="" type="checkbox"/>	PW	Facility	Fire Extinguisher Replacement	PM-FE-04	Preventive Maintenance	Maintenance	Marco Polo	

250 items per page Select Page Items Selected: 0 1 - 7 of 7 items

Remove Selected **Mass Update**



Reassign PMs with Batch PM Update

General Information

New Browse Selection

<input checked="" type="checkbox"/>	Item Tag	Item Type	Task Description	Task Code	WO Type
<input checked="" type="checkbox"/>	PD	Facility	Fire Extinguisher Check	PM-04	Preventive Maintenance
<input checked="" type="checkbox"/>	PD	Facility	Fire Extinguisher Replacement	PM-FE-04	Preventive Maintenance
<input checked="" type="checkbox"/>	PD-DAC	Equipment	Change belts & grease bearings	PM-03	Preventive Maintenance
<input checked="" type="checkbox"/>	PD-EWS	Equipment	Inspect Eyewash station	PM-08	Preventive Maintenance
<input checked="" type="checkbox"/>	PW	Facility	Waterless Urinal	PM-10	Preventive Maintenance
<input checked="" type="checkbox"/>	PW	Facility	Fire Extinguisher Check	PM-04	Preventive Maintenance
<input checked="" type="checkbox"/>	PW	Facility	Fire Extinguisher Replacement	PM-FE-04	Preventive Maintenance

250 items per page

Remove Selected Mass Update

PMSchedule Mass Update

Update Fields Option

General

Include	New Value
<input type="checkbox"/> Active	<input type="checkbox"/>
<input type="checkbox"/> Repair Center	<input type="text"/>
<input type="checkbox"/> Work Order Type	<input type="text"/>
<input type="checkbox"/> Priority Description	<input type="text"/>
<input type="checkbox"/> Trade	<input type="text"/>
<input type="checkbox"/> Department	<input type="text"/>
<input type="checkbox"/> Account #	<input type="text"/>
<input type="checkbox"/> Rate Schedule	<input type="text"/>

Technician Code

Scheduling Options

Include	New Value
<input type="checkbox"/> Est. Time	<input type="text"/>
<input type="checkbox"/> Days To Complete	<input type="text"/>
<input type="checkbox"/> Use Modern Interval Pattern	Fixed <input checked="" type="radio"/> Floating <input type="radio"/>
Next PM Date	<input type="text"/>
Every	<input type="text"/>
Fixed DOW	<input type="text"/>

Update Cancel



Deactivating Technician

WebTMA 7 **TECHNICIAN**

Fast Find - Search

Identity **HR** Checkout PPE Training Costs Facilities Repair Centers Work Orders

Records

- 12209 - Ronnie Gold
- 123456 - Axel Rose
- 13031 - Steve Enicks
- 14371 - Hoho Ho
- 14462 - Chris Pebacon
- 14791 - JP Post
- 22536 - Marco Polo
- 317265 - John Doe**
- ADMIN - GEN001 GEN001
- AKB - Amanda Burczyk
- RM_TRHA - Ryan Melville

General Information

ID	317265	Active	<input checked="" type="checkbox"/>
First Name	John	Title	Maintenance Worker
Last Name	Doe	Charge Rate	1.00
Shift	101	Account #	
Driver	<input type="checkbox"/>	MobileTMA Days	
Comments	<input type="text"/>		
		Supervisor	<input checked="" type="checkbox"/>

Work / Other Information

- Edit
- Deactivate
- Save



Deactivating Technician

WebTMA 7 **USER MANAGEMENT** TOWN OF APPLEWOOD
A DELICIOUS PLACE TO LIVE

Fast Find - Search [Search Icon] [Refresh Icon] **+ Add** **Edit** [Copy Icon] [Delete Icon] [First Icon] [Prev Icon] [Next Icon] [Last Icon] [Print Icon]

★ [Star Icon] [Bookmark Icon] [Search Icon] [Refresh Icon] [Home Icon]

Identity **Preferences** Groups Window Access Data Access Mobile Access More ▾

Records

- AKB
- ARose
- COG
- CPebacon
- HHo
- JDoe**
- JPost
- MPolo
- RGold
- SEnicks
- TMA
- TMAesp
- TRHA

General Information

First Name	John	Active	<input checked="" type="checkbox"/>
Last Name	Doe	Login ID	JDoe
Initials	JD	Password	*****
Email		Organization Unit	
Default From Email	<input type="checkbox"/>	URL Login	<input type="checkbox"/>
Phone #		Locked Out	<input type="checkbox"/>
Fax #		Force Password Change	<input checked="" type="checkbox"/>
Department		Preferred Language	
Last Activity			

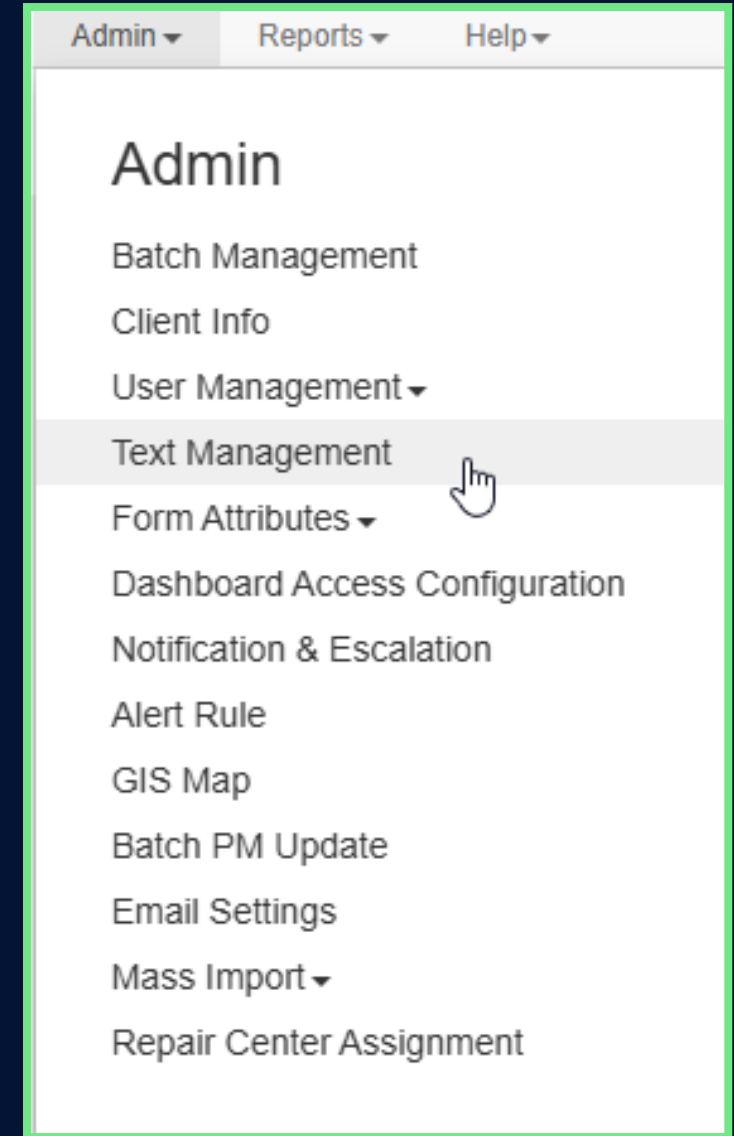
Access

Role	User	mobileTMA	<input checked="" type="checkbox"/>
Requestor		CellularTMA	<input type="checkbox"/>
Set as Global Default	<input type="checkbox"/>	Mobile Access Only	<input type="checkbox"/>
<u>Technician</u>	John Doe	Mobile General Inspections	<input type="checkbox"/>
Set as Global Default	<input type="checkbox"/>	Anonymous Access Only	<input type="checkbox"/>

- Edit
- Deactivate
- Remove licenses
- Save

Text Management

- Grant Access to Text Management
- Update nomenclature to fit your organization
- Verify which pages should see this change



Replacing Text

- Search for the *Form* (Window) and *Text to Replace*
- Then click *Search*

The screenshot shows a software interface for managing text in forms. At the top, there are buttons for 'Save' and 'Cancel'. Below that, the 'Identity' section is visible. A search bar is highlighted with a green box, containing 'Form Name' set to 'Equipment' and 'Text to Replace' set to 'Purchase Date'. A 'Search' button is located to the right of the search bar. Below the search bar is a table titled 'Controls' with the following columns: Form, Control, Type, Default Text, and Custom Text. The table contains one row: 'Equipment > Identity', 'PurchaseDate', 'Page Label', 'Purchase Date', and an empty 'Custom Text' field. At the bottom of the table, there are navigation arrows and the text '1 - 1 of 1 items'. Below the table is a 'Custom Text' section with a text input field labeled 'Custom Text to Display', and two buttons: 'Apply Custom Text' and 'Clear Custom Text'.

Form	Control	Type	Default Text	Custom Text
Equipment > Identity	PurchaseDate	Page Label	Purchase Date	



Replacing Text

- Search for the *Form* (Window) and *Text to Replace*
- Then click *Search*

The screenshot shows a software interface for text management. At the top, there is a 'Search Fields' section with a 'Form Name' dropdown set to 'Equipment' and a 'Text to Replace' input field containing 'Purchase Date'. There are checkboxes for 'Exact Match' and 'Only Search Custom Text', and a 'Search' button. Below this is a 'Controls' table with the following columns: Form, Control, Type, Default Text, and Custom Text. The table contains one row: 'Equipment > Identity', 'PurchaseDate', 'Page Label', 'Purchase Date', and 'Installation Date'. At the bottom, a dialog box is open with 'Custom Text to Display' set to 'Installation Date' and an 'Apply Custom Text' button.

Form	Control	Type	Default Text	Custom Text
Equipment > Identity	PurchaseDate	Page Label	Purchase Date	Installation Date

Custom Text to Display:

Text Management



Searching ALL windows?

- Leave *Form Name* blank

Only want to view existing customized text?

- Check the “Only Search Custom Text” box

Want to revert Custom Text to default?

- Select a line with Custom Text and click “Clear Custom Text”

The screenshot shows a software interface for text management. At the top, there is a 'Search Fields' section with a dropdown menu for 'Form Name' (highlighted with a black box), a 'Text to Replace' input field containing 'Purchase Date', an 'Exact Match' checkbox, and an 'Only Search Custom Text' checkbox (highlighted with a black box). A 'Search' button is located below these options.

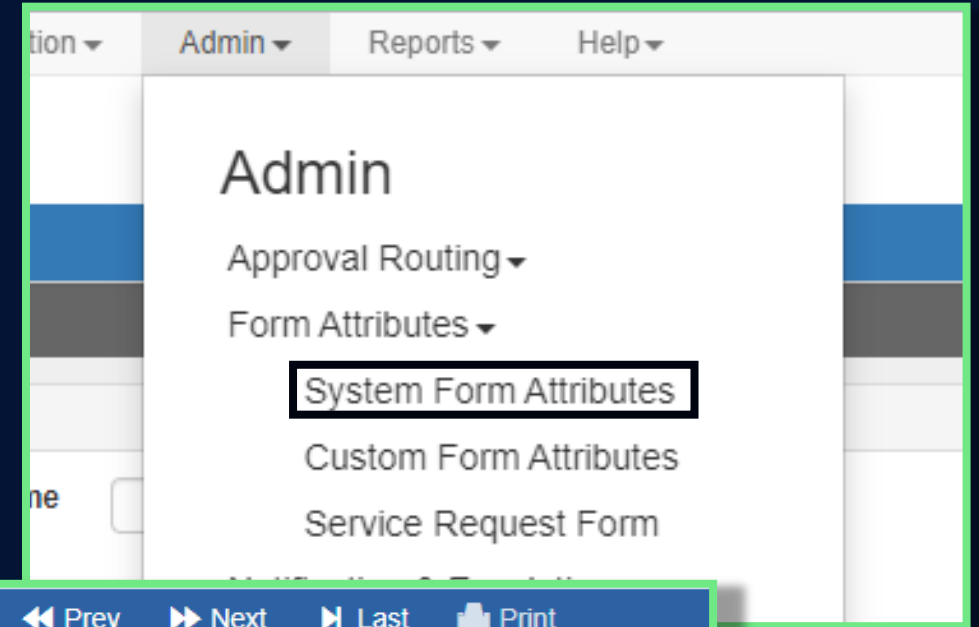
Below the search section is a 'Controls' section containing a table with the following columns: Form, Control, Type, Default Text, and Custom Text. The table lists various report forms and their associated controls, all with 'Purchase Date' as the default text. The first row is selected, and the table has a pagination bar at the bottom showing '1 - 25 of 27 items'.

At the bottom of the interface is a 'Custom Text' section with a 'Custom Text to Display' input field, an 'Apply Custom Text' button, and a 'Clear Custom Text' button (highlighted with a black box).

Form	Control	Type	Default Text	Custom Text
(Report Form) Area Inventory	Report Field	Report Field	Purchase Date	
(Report Form) Asset	Report Field	Report Field	Purchase Date	
(Report Form) Asset Replacement Cost	Report Field	Report Field	Purchase Date	
(Report Form) Biomed Equipment Replacement Cost	Report Field	Report Field	Purchase Date	
(Report Form) Entity	Report Field	Report Field	Purchase Date	
(Report Form) Entity Replacement Cost	Report Field	Report Field	Purchase Date	
(Report Form) Equipment Replacement Cost	Report Field	Report Field	Purchase Date	
(Report Form) IT Equipment	Report Field	Report Field	Purchase Date	

System Forms

- Customize base windows
- Require fields
- Hide fields
- Add UDFs
- Affects the page for ALL users!



Fast Find - Search

+ Add Edit Copy Delete First Prev Next Last Print

Identity

Window

Window Name	WorkOrder	Title	Work Order

Pages

		Title	Visib
▶		Identity	<input checked="" type="checkbox"/>
▶		QP Meter Reading Entry	<input checked="" type="checkbox"/>
▶		Results	<input checked="" type="checkbox"/>

Pages



		Title	Field Name	Req...	Ena...	Visible	Tab ...	Drop...	Pop ...	Default Value
<input type="checkbox"/> Identity										<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account Code	AccountCode	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Additional Information	AdditionalInformation_He...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Alt Tag #	AltTagNumber	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Area #	AreaRoomNumber	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Arms	Arms	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Art Depth	ArtDepth	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Art Height	ArtHeight	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

System Forms - Grids



		Field Name	Required	Enabled	Visible
▶	<input type="checkbox"/>	BoM Group Parts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	<input type="checkbox"/>	CD Route Area Task Selection Grid	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	<input type="checkbox"/>	Closed Work Order Detail Grid	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Closed Work Order Grid	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Column Name	Enabled	Visible	
<input type="checkbox"/>	<input type="checkbox"/>	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	Requested	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	Closed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

System Forms – Action Menu



Action Menu Items		
	Title	Visible
↓	Create WO	<input checked="" type="checkbox"/>
↑ ↓	Show Audit History	<input checked="" type="checkbox"/>
↑ ↓	Groups	<input checked="" type="checkbox"/>
↑ ↓	Transfer History	<input checked="" type="checkbox"/>
↑ ↓	View Events	<input checked="" type="checkbox"/>
↑ ↓	Dispose	<input checked="" type="checkbox"/>
↑ ↓	Export Template	<input checked="" type="checkbox"/>
↑	Map It!	<input checked="" type="checkbox"/>

System Forms – User Defined Fields



UDF Configuration

Name* Field Type*

Description

Type-specific

Add Option

				Option Text
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Red
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Blue
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Green
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Other

1 - 4 of 4 items

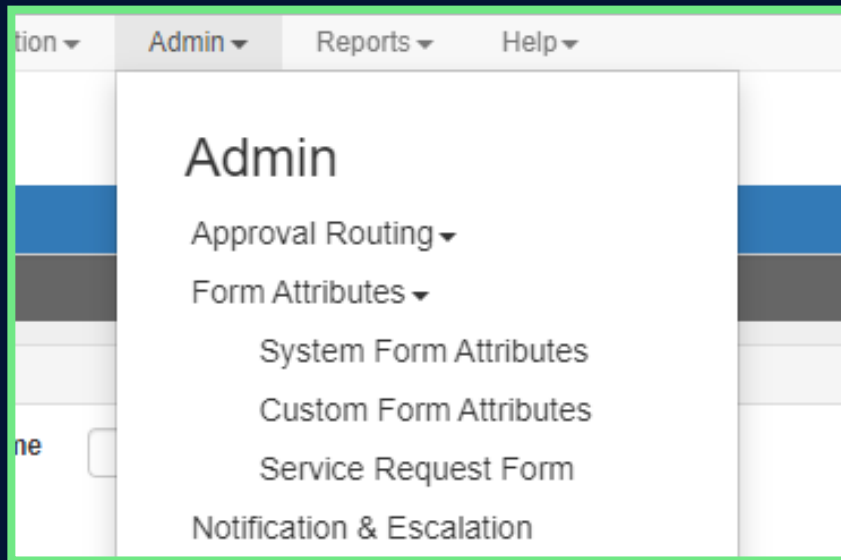
Save Save & Add Cancel

Field Type*

- Checkbox
- Date/Time
- Decimal Numeric
- Dropdown List
- Integer Numeric
- Text



Custom Form Attributes



- Creates a Copy of an existing page, to make changes
- Forms based on User Type
- Restrict Access to certain tabs
- UDFs must be created on the System Form, but can be hidden

Custom Form Attributes



CUSTOM FORM ATTRIBUTES

✓ Save ✕ Cancel

Identity Users & Groups

Custom Window

Copied From* Work Order

Custom Form Name* Chargeable Work Order

Get Data

Clear Data

	Title	Visible
▶	Identity	<input checked="" type="checkbox"/>
▶	QP Meter Reading Entry	<input checked="" type="checkbox"/>
▶	Results	<input checked="" type="checkbox"/>
▶	Costs	<input checked="" type="checkbox"/>
▶	Billing Info	<input checked="" type="checkbox"/>
▶	Schedule	<input checked="" type="checkbox"/>
▶	Attachment	<input checked="" type="checkbox"/>
▶	Approval Routing History	<input checked="" type="checkbox"/>
▶	Linked WO	<input checked="" type="checkbox"/>
▶	Invoices	<input checked="" type="checkbox"/>
▶	Add KB Resolution	<input checked="" type="checkbox"/>
▶	Authorization	<input checked="" type="checkbox"/>
▶	Billing Info Entry	<input checked="" type="checkbox"/>
▶	Cancel WO	<input checked="" type="checkbox"/>
▶	Check Results	<input checked="" type="checkbox"/>

1 - 15 of 73 items

Grids

Custom Form Attributes



CUSTOM FC

✓ Save ✕ Cancel

Identity Users & Groups

Custom Window

Copied From* Work Order ▼ ...

Get Data Clear Data

Tabs

...



Admin as a Service

- Data Input
- Data Assessments and Cleanup
- Training
- Custom Dashboards
- Query creation
- Help with Reports
- System Admin (Entering WO, writing/scheduling PM's, User Management, etc.)





WebTMA Demo & Q&A

Thank you

