WebTMA
Cumulative Release Notes
2026

July 2026

This document contains Release Notes for v7

July 2026

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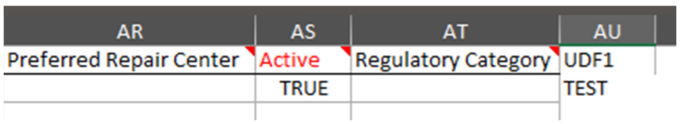
Contents

July 7, 2026

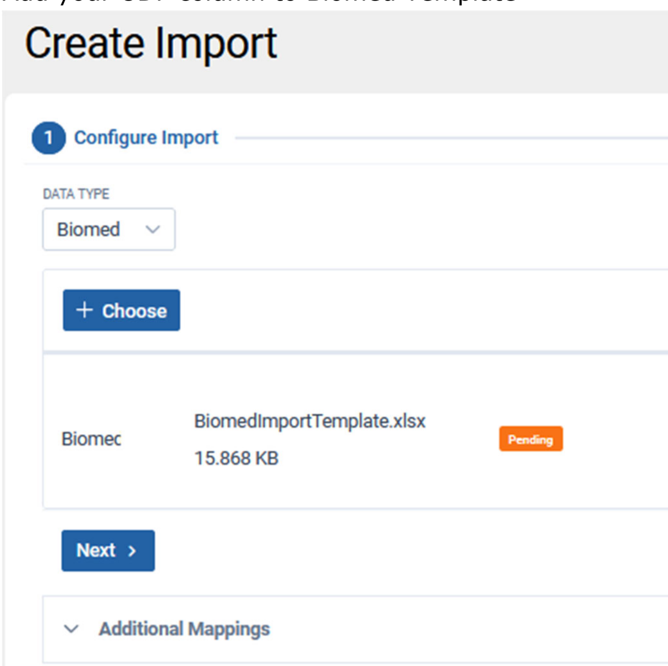
NOTE: **WebTMA mobile** has new updates worth a look, such as a Show on Map feature. You can see them all here.

Biomed Mass Import Now Accepts UDFs

Path: *Admin > Mass Import*

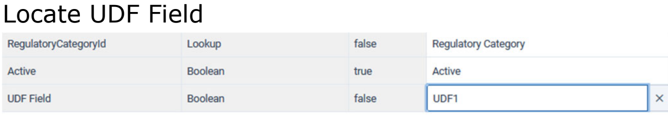


Add your UDF column to Biomed Template



Create Import and expand Additional Mappings

Locate UDF Field



Rename the UDF Field to match your Column Name

Summary: To increase the usability of User Defined Fields, you can add your own UDF columns to your Biomed Mass Import template.

Details:

Many Biomed clients have special requirements for fields specific to their organization. Using UDFs accommodates each Biomed client's needs to search and generate reports.

When you download the Biomed Template, you need to add your own UDF column names to be available in the Additional Mappings section.

From Create Import in the application, the system auto-detects UDF columns.

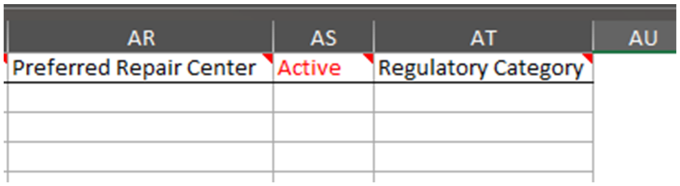
Expand the *Additional Mappings* section to re-map columns to match your field name prior to import.

This feature will be added for other MWIs in the future.

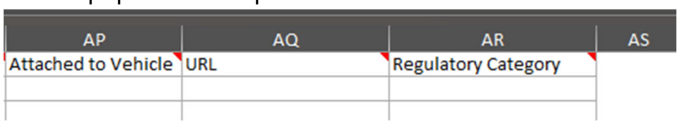
Biomed and Equipment Mass Import Templates Enhanced

Path: *Admin > Mass Import*

Biomed Template



Equipment Template



Summary: A *Regulatory Category* column has been added to the Mass Import templates for Biomed Equipment and Equipment.

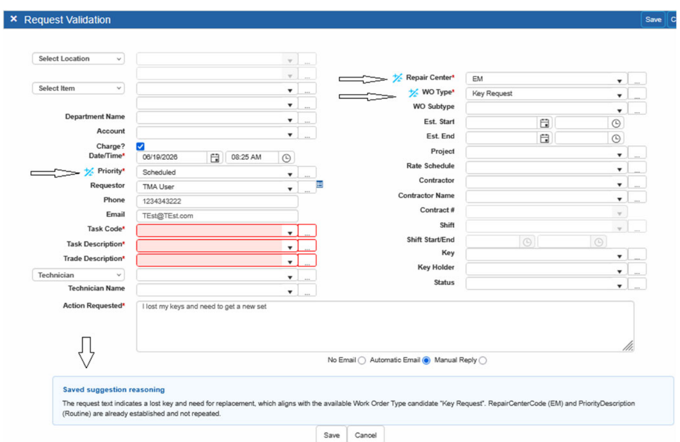
Details:

This column is found at the end of the columns in the template.

The Regulatory Category drop-down options are defined in *Organization > Lookups > Regulatory Categories*. These are matched during the import process.

If you are required to report to regulatory agencies, this field is used. You can quickly generate a list to give the agency when needed.

AI Request Validation Summary Suggestions



Path: *Transactions > Request > Request Log*

Summary: The AI Assistant can help with speed and accuracy when converting a Request to a Work Order.

Details:

When a new Request is received, AI automatically:

- queries past Work Orders for the same space or asset
- provides a historical summary
- predicts a diagnosis
- pre-populates suggested field values on the *Request Validation* flyout (Task Type, Trade, Technician, etc.).
- includes reasoning for each suggestion

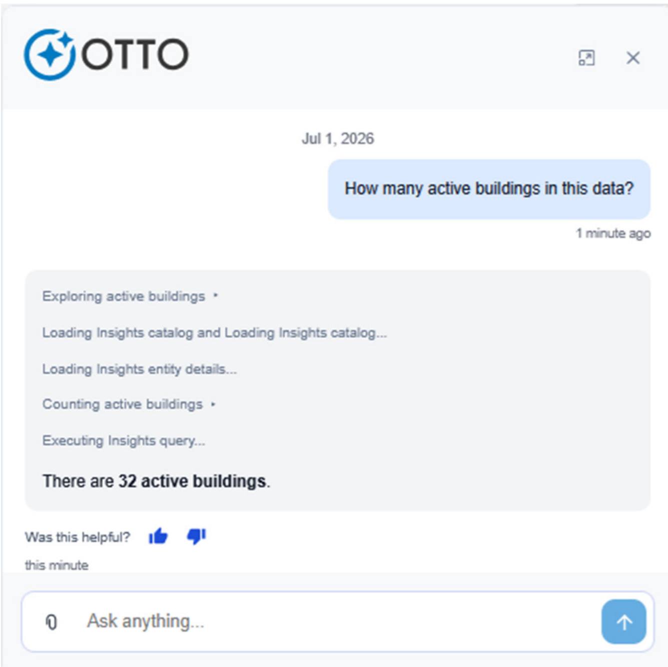
Once a new Request is received, the system gathers the information. At times there may be a short delay if you open a very recent record.

When you click the *Accept* button, you see fields with suggested values on the *Request Validation* flyout. Suggested fields are identified with a sparkle icon.

Look to the bottom of the flyout for the *Saved suggestion reasoning* box for explanations about the suggestions.

NOTE: This feature is automatic if you have OTTO enabled. Currently it is not enabled for requests using Auto Attendant.

OTTO Polls Numerous Windows



Path: *Landing Page*

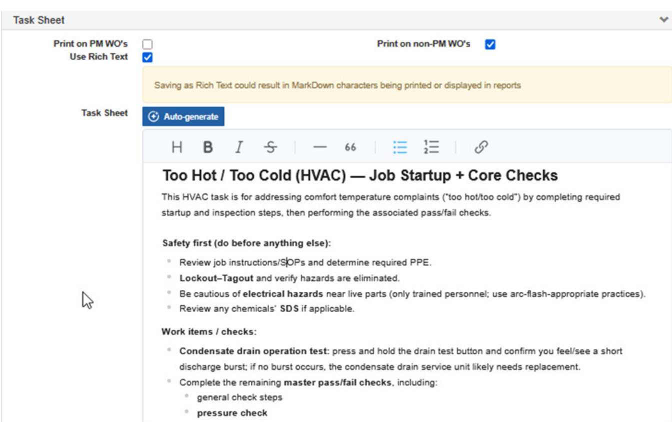
Summary: When you query OTTO from the Landing Page using the icon at lower left, the search has expanded beyond Work Orders. A list of the windows now included in OTTO's search can be found here.

Details:

TMA continues to improve the use and scope of our AI assistant to help you accomplish your goals more quickly and accurately.

Additional windows will be added in the future.

Task Sheet Field Has AI Enhancements



Path: *Organization > Task > Records*

Summary: You can improve the contents of your Task Sheets with AI. This gives you a faster way to create something easy for technicians to understand without writing everything from scratch

Details:

If the field already has text, click the *Auto-generate* button. This uses AI to rewrite it and improve existing content - making it easier for Technicians to read.

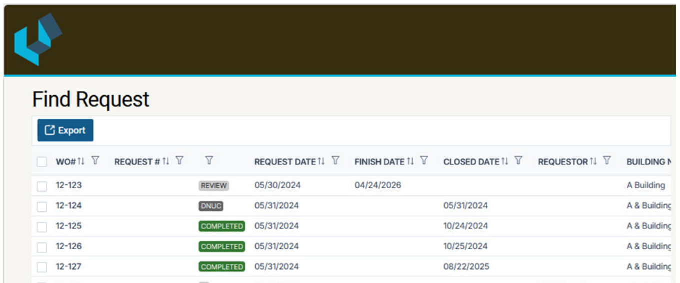
When the field is empty, click the button to have AI write a draft based on the *Task Description*.

The enhancement is only available if you mark the *Use Rich Text* check box.

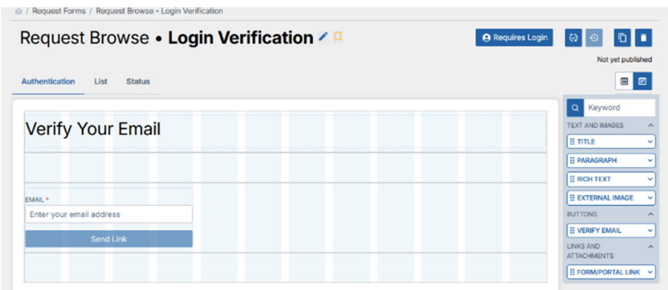
AI uses MarkDown (or rich text). Note the alert above the *Task Sheet* field. If you print Work Orders, it may show MarkDown characters, which can be confusing to readers.

June 23, 2026

VOC – Requestor Email Search Enhancement on SRP Search Page



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



Summary: On the Service Request Portal (SRP) *Search* page, you now have the option to search by email alone - no *Request #* needed.

Details:

In addition to making the *Request #* optional, a new grid replaces the previous single-result redirect. The grid shows all requests tied to an email address.

The contents on the grid can be rearranged with filtering and sorting, similar to the Status page attributes.

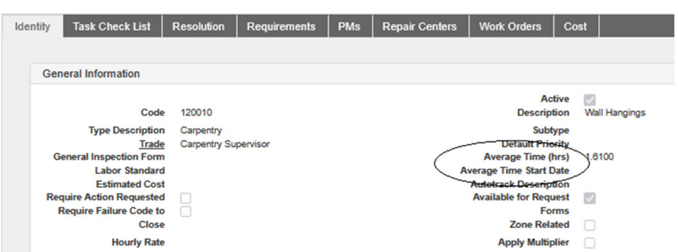
Logged-in users see the results immediately if their email address matches the Request record.

Anonymous users enter their email address from the new *Request Browse* form to receive an email with a one-time link. When they click the link, they go to the page with all their requests. Note that this is required for anonymous users, but regular users can also use of the form.

As long as the email address is on the original request both types of users see a list of all their requests.

This is the June Voice of the Customer enhancement. It is a feature requested by Azusa Pacific University. 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.

Task Average Hours Action Enhanced



Path: *Organization > Task > Records*

Summary: You can now reset the Task *Average Time* if needed.

Details:

Previously, you could update the field manually; however, the field reverted to its former value the next day. This is due to the automated *Task Average Time* batch job that runs every 24 hours and recalculates the average time using all historical labor data.

The *Average Time (hrs)* field is **now read-only**.

A new *Average Time Start Date* field has been added immediately below the *Average Time (hrs)* field.

This new date field controls the calculation window. The date can be any time in the past. When a date is entered, the nightly batch job only considers closed

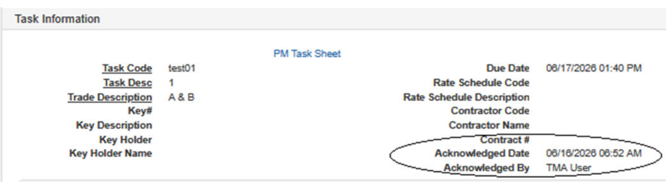
Work Orders completed **on or after** that date rather than all historical data.

This ensures manual overrides are preserved while still allowing the system to continue automatic recalculations going forward.

If the field is empty, the batch calculates across all history as usual.

NOTE: The *Recalculate Task Average Time* found on the *Client Info* Action Menu also respects the manual start date — it only uses labor history after the most recent manual update timestamp.

Acknowledgement Restrictions Removed on WO Action Menu



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

Summary: Use of the *Acknowledge* link on the *Work Order* window is available for use on all WOs. It is no longer restricted to Notification and Escalation settings.

Details:

Previously, the link was disabled unless it was tied to Notification and Escalation.

The constraint has been removed so all Work Orders can be acknowledged. If it is multi-task, you are asked if you want to acknowledge all. You have the choice to select the tasks you want to acknowledge.

Acknowledgement populates the *Acknowledged By* and *Acknowledgement Date* fields in the *Task* Section. The fields are read-only. For multi-task WOs, the information is completed in the same columns in the grid.

When all tasks are acknowledged, the *Acknowledge* link is disabled.

Note: You can continue to use the *Require Acknowledgement* check box on *the Notification and Escalation* window as before.

Virtual Facility (VF) Alarm Status Shown in Request Log

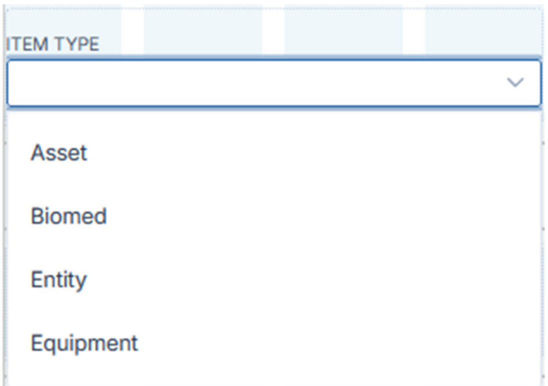
Path: *Transactions > Request > Request Log*

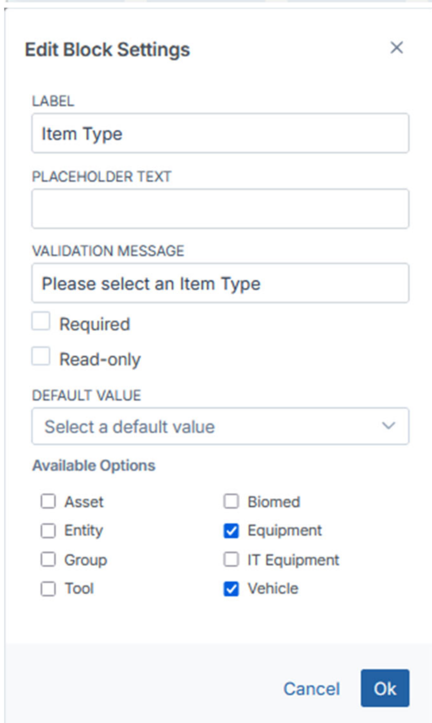
Summary: If you use Virtual Facility to monitor alarms, the *Request Log* window Action menu will include a *Show Alarm Status* link.

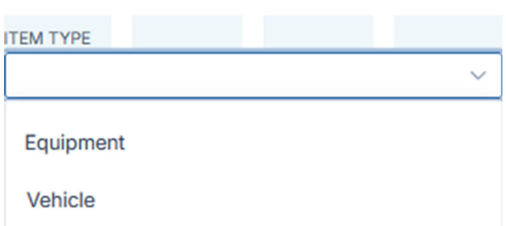
Details:

Click the link to open the *Alarm Details* flyout. This gives you the information needed about the alarm without leaving WebTMA.

SRP Item Type Field Now Allows Restricted Values







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

Summary: When you build your Service Request Portal (SRP) Form, you can now control which values requestors see in the *Item Type* drop-down selection.

Details:

Rather than displaying all Item Types for your requestors, you can choose which values are applicable to requestors.

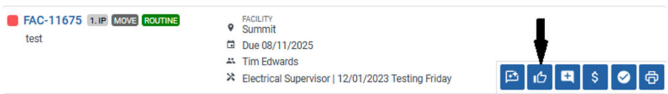
Click the gear icon to open the *Edit Block Settings* popup. Note that all available check boxes in the *Available Options* section are marked. This indicates that all options will be visible to the requestor.

If you want to limit the item types, clear the check box for any Item Type your user should not see.

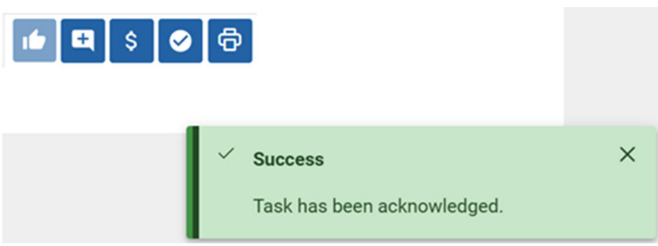
Note: If all check boxes are cleared, the system views them as marked and will display all Item Types.

June 9, 2026

Acknowledge Icon Added to Landing Page – Active Tasks Tab



Path: *Landing Page / Active Tasks Tab*



Summary: Technicians have the option to use the new  *Acknowledge* icon on the Landing Page to let others know they have received a Work Order.

Details:

Since not all Technicians use WebTMA mobile, this allows all Technicians to use the Acknowledge feature.

When clicked, a popup 'Success' reminder displays. In addition, the current date is added to the *Work Order - Task Information* section in the *Acknowledged Date* field. Once clicked, the icon is disabled to prevent multiple acknowledgements.

Note that this Acknowledgement is not dependent on the Notification and Escalation rules and any user can mark these lines as Acknowledged.

Source Field Now Available in SRP

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

Summary: The Service Request Portal (SRP) has a new *Source* field you can add to your forms.

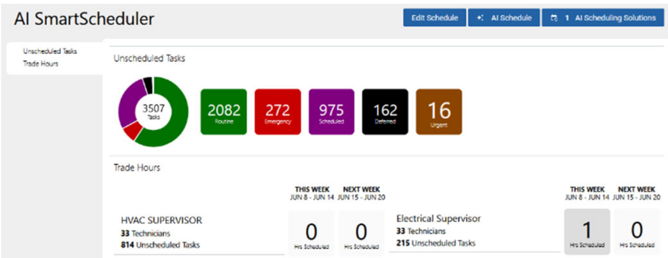
Details:

Our clients want to identify their SRP requests using the terminology they create in *Organization > Lookups > Sources*.

Use of this field gives immediate information about the source.

Adding the new *Source* field to a Form saves both manual effort and extra clicks to see this information.

AI SmartScheduler Dashboard Enhanced for Supervisors



Path: *Transactions > Time Manager > AI Smart Scheduler*

Summary: The AI SmartScheduler now filters Trades for Supervisor users.

Details:

Previously, the Supervisor saw every Trade available through their Repair Center access.

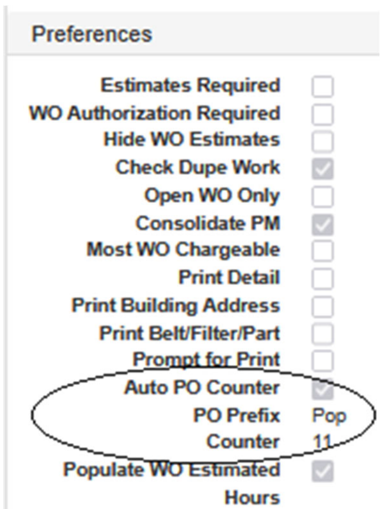
Now the system checks if the logged-in user has a Technician record marked as Supervisor. When this is true, the Trade list is filtered to show only Trades where the user is assigned as Supervisor.

With this enhancement, Supervisors only see the Trades they oversee, which helps reduce the amount of data they must review. It makes use of the tool faster and easier.

This change is based on feedback from the TMAi Board, and we appreciate their insight and suggestions.

May 26, 2026

PO Counters Available by Repair Center



Path: *Organization > Repair Center > Records / Identity Tab–Preferences Section*

Summary: You now have the option to set Automatic Purchase Order Counters and Prefixes by Repair Center rather than globally.

Details:

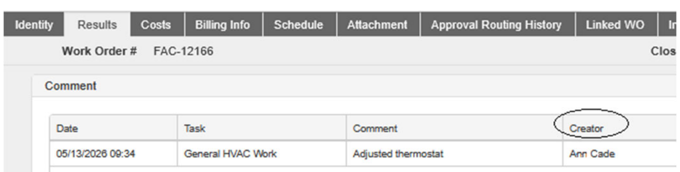
Three new fields have been added to the Preferences section of the Identity Tab: *Auto PO Counter*, *PO Prefix*, and *Counter*.

When you mark the three fields, Purchase Orders with that Repair Center populated on the record use the prefix and count value designated on the Repair Center Preferences.

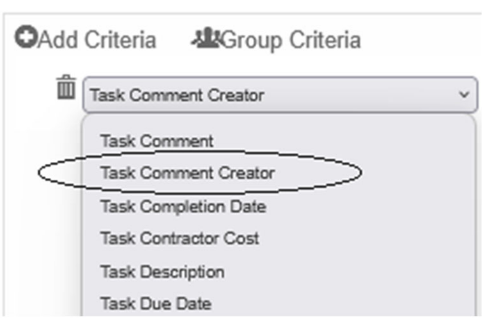
If you need to track purchases by Repair Center, this new feature is a quick and easy way to do so.

You also have the option to set the global counter on the *Admin > Client Info / Counters* Tab. If both are set, the Repair Center settings are used.

Creator Column Added to WO Results Tab Comment Section



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



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

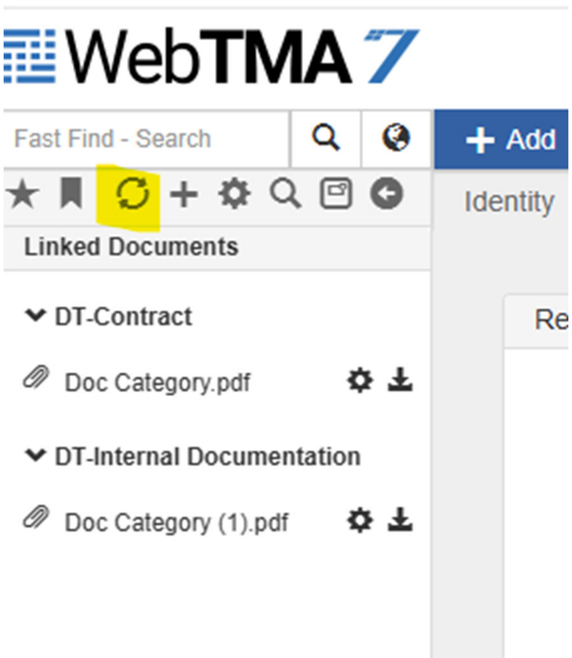
Summary: A new *Creator* column has been added to the *Work Order / Results* Tab in the *Commen*t Section. This identifies the person who made the comment. The column was also added to the *Find* Criteria list.

Details:

Previously, comments made from WebTMA mobile were not seen in the main application. With this new column, the creator of the comment is identified.

In addition, the new column has been added to the Criteria drop-down, which makes it searchable and reportable.

Linked Documents Section Enhanced



Summary: As a follow-up to the Linked Documents grid released on May 12, the Linked Documents section in the Navigation panel has been improved.

Details:

Previously, the section could be displayed in two states using the toggle icon :

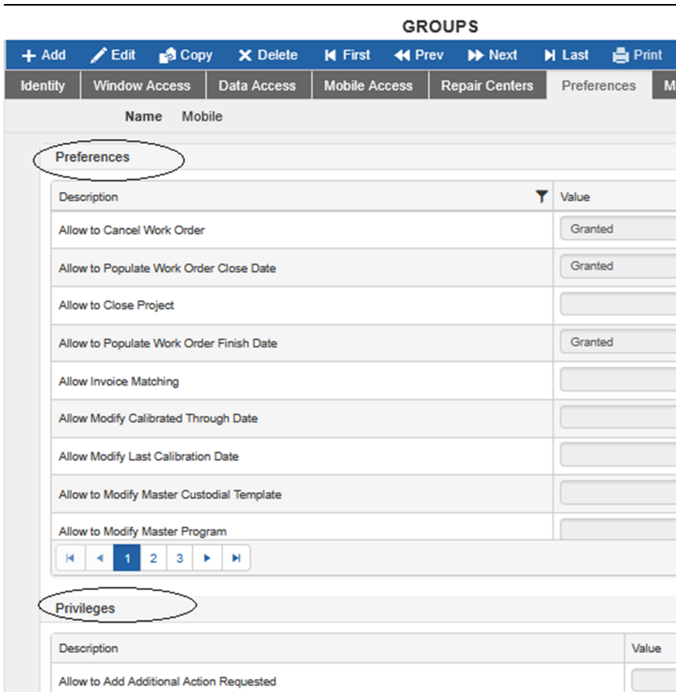
- Grouped by file Type
- Grouped by Entity (e.g., WO, Asset, etc.)

The revised view can be displayed in three states:

- Grouped by file Type
- Grouped by Entity (e.g., WO, Asset, etc.)
- Grouped by file Category

The toggle icon has been changed to a cyclical icon .

Copied User Groups Now Retain Preferences/Privileges



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

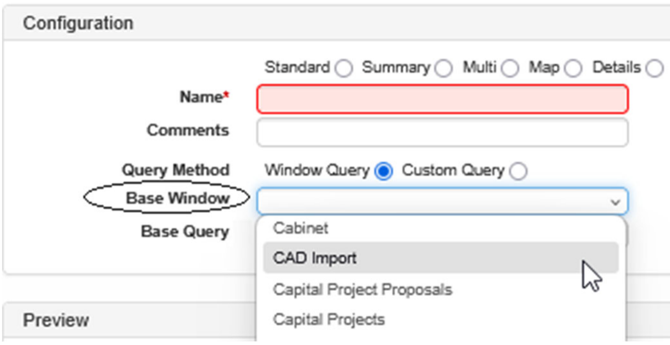
Summary: When you copy a User Group record, the copied record now has the same Preferences and Privileges.

Details:

Previously, a copied Group record did not save the contents of the *Preferences* Tab.

With this enhancement, you can clone different Groups without having to add new Preferences or Privileges. Of course, you can always make changes to the copied record but having a base will save time.

CAD Import Queries Available to Dashboard Controls



Path: *Dashboard / Add New Control*

Summary: If you have the Space Management module, you can now select *CAD Import* for your Dashboard controls.

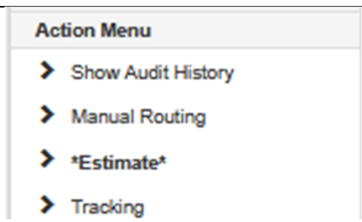
Details:

The *Base Window* drop-down list now includes CAD Import.

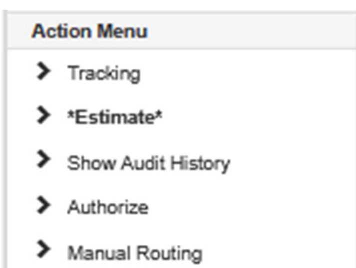
Previously, the selection was not available.

Reminder: This option is only visible if you have the Space Management module.

Requests Converted to Projects Now Include Estimates



Path: *Transactions > Request Log*



Path: *Transactions > Project > Records*

Summary: When a Request Log record has an attached Estimate and is converted to a Project, the new Project inherits the associated Estimate.

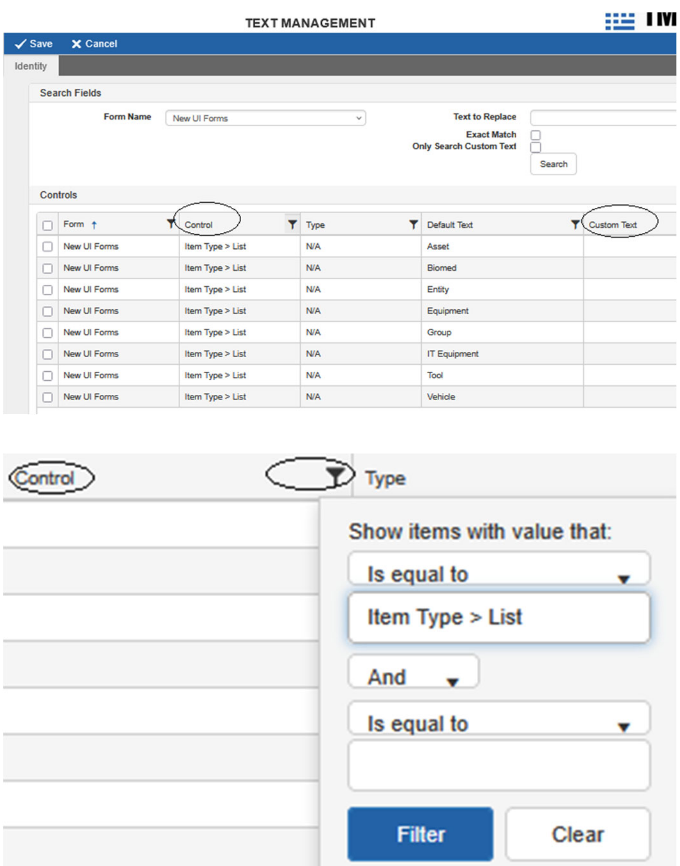
Details:

Previously, the system did not include Estimates attached to a Request. Now, if the Request Log has an Estimate, the Project inherits the Estimate from the Request Log.

You can identify the presence of an Estimate by looking at the Action Menu. If the Estimate link is bolded and bounded by asterisks (***Estimate***), it alerts you that the record has an Estimate.

Note that any changes to the Estimate must be made from the Project record. Changes made are **not** reflected on the Request Estimate record.

Custom Item Type Labels Now in SRP



Path: *Admin > Text Management*

Summary: The SRP (Service Request Portal) now displays Text Management Item Type label customizations.

Details:

Previously, when a client renamed Item Type labels in the application (e.g., "Equipment" renamed to "Asset"), those changes were not reflected in the SRP.

You can now see Item Type custom text in the SRP Item Type dropdown.

To add the custom labels:

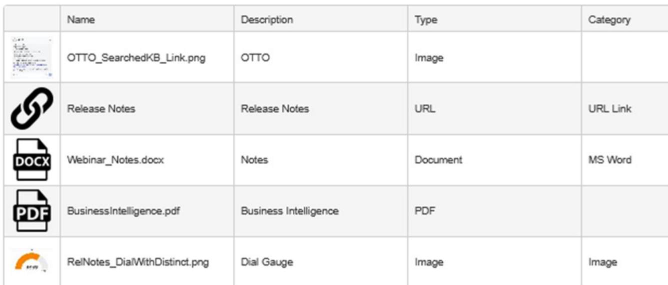
1. Go to *Admin > Text Management*.
2. Enter New UI Forms in the *Form Name* field.
3. Click the *Search* button to see all lines.
4. Click the *Control* column filter. See illustration at left, to filter for *Item Type > List*.
5. Follow the standard procedure to add new labels to the *Custom Text* column.

Any custom text entered here is now reflected in the SRP drop-down.

More information about adding custom text is available at https://knowledgebase.tmasystems.net/hc/en-us/articles/7873531021965-Text-Management-WebTMA-7.

May 12, 2026

VOC – Linked Documents Enhancements



	Name	Description	Type	Category
	OTTO_SearchedKB_Link.png	OTTO	Image	
	Release Notes	Release Notes	URL	URL Link
DOCX	Webinar_Notes.docx	Notes	Document	MS Word
PDF	BusinessIntelligence.pdf	Business Intelligence	PDF	
	RelNotes_DialWithDistinct.png	Dial Gauge	Image	Image

Path: *Linked Document List flyout*

Summary: The Paper Clip icon on the toolbar of any record that has Linked Documents has been improved to make it more meaningful and easier to use. Labels have been revised for clarity.

Details:

When you click the Paper Clip icon, it opens a read-only flyout grid that shows the document details, a thumbnail, and the document type.

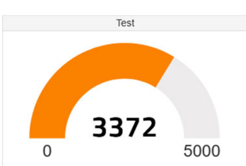
Click the thumbnail in the first column to do the following:

- File icon – Download the file
- Image icon – Open a full size image in a new browser tab
- Link icon – Opens the link in a new browser tab

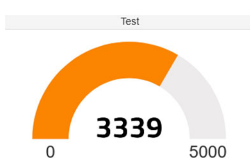
Two column labels have been reversed for better understanding. The Category is now *Type* and Document Type is now *Category*. In the Category, your selections include options from *Lookups > Document Types*.

This is a May Voice of the Customer enhancement. It is a feature requested by clients converting from WebTMA 5 to WebTMA 7 as well as others in the Community. 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.

Dashboard Queries Enhancement



No Distinct Setting



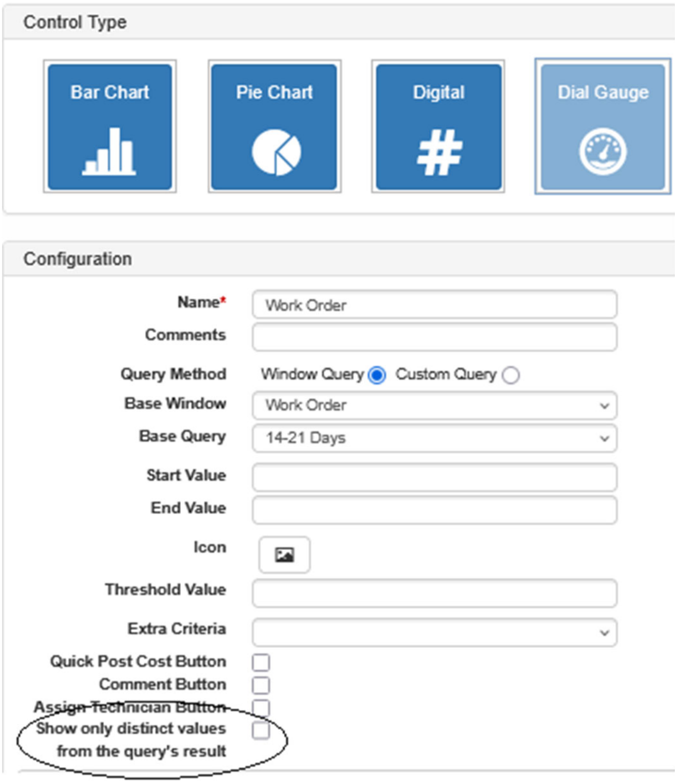
With Distinct Setting

Summary: If you use Executive Dashboard graphic displays, you now have the option to *Show only distinct values from the query's result* for records which previously appeared to give "duplicated" results.

Details:

When you mark the *Show only distinct values from the query's result* check box, only one count is included.

Previously, if you had a Dashboard Control with Work Orders and a column for multi-tasks or schedules, a value for each instance was returned. For example, a



Path: *Files > My Dashboard*

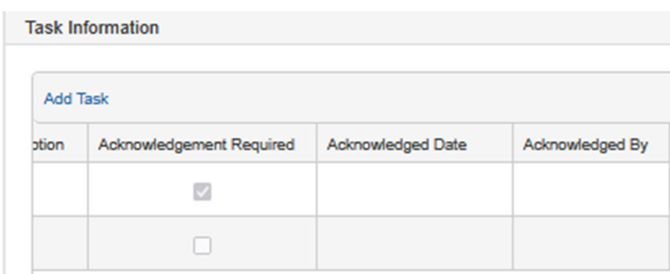
Work Order with three Tasks was counted three times.

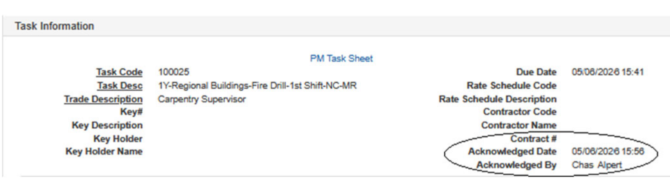
When you opt for *distinct values*, you can drill down to Task level of the record for details about a Work Order.

If the query has no multi-task or schedule records, it returns the same data with or without the "distinct" check box marked.

This enhancement applies to all four graphic types: Bar Chart, Pie Chart, Digital, and Dial Gauge. It has been requested over the years in many Community suggestions.

Acknowledgement Enhancements





Path: *Transactions > Work Order > Records*

Summary: The Acknowledgement fields for Work Orders have been relabeled and enhanced for clarity and better visibility.

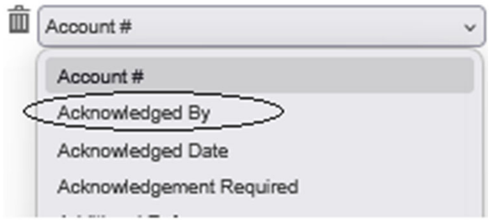
Details:

The *Acknowledgement* label on the *Work Order / Identity-Task Information* section has been changed to *Acknowledgement Required*.

For single-task Work Orders, *Acknowledged By* has been added as a read-only field below the *Acknowledged Date* field. These two fields are visible on the single-task Work Order only when they are populated.

In the *Find* flyout on the Work Order window, the *Acknowledged User Initial* query option has been replaced by *Acknowledged By*.

These fields are populated when a Work Order is acknowledged from either the main application or WebTMA mobile.



Path: *Transactions > Work Order > Records-Find*

Work Order Customer Survey Improvements

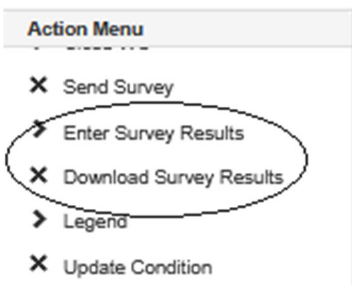
Summary: A new Work Order Action Menu link (*Download Survey Results*) and a relabeled link (*Enter Survey Results*) have been added to the Work Order Action Menu.

Details:

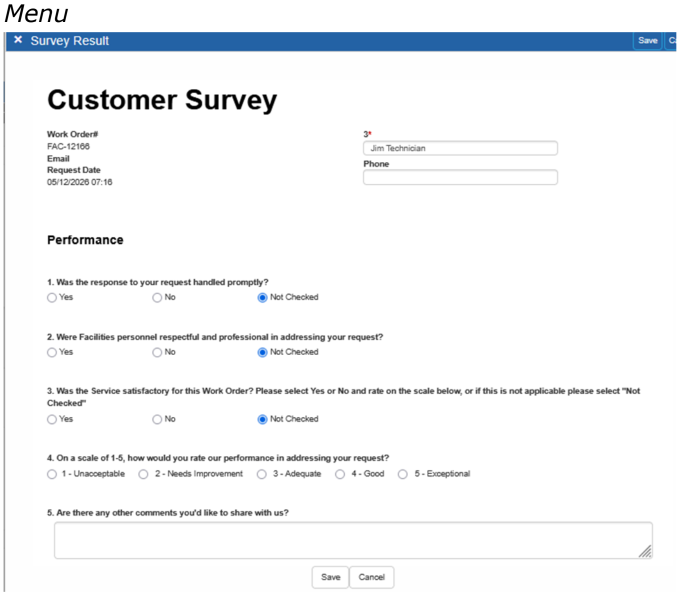
When you click the new *Download Survey Results* link, WebTMA automatically downloads the results in a .pdf file to a browser tab.

The previous Survey Results label was renamed *Enter Survey Results* for clarity. When clicked, the *Survey Result* flyout opens to allow you to enter results manually if needed.

These changes help you be more efficient by providing quick access to the completed survey data directly from the Work Order without having to open other windows or perform manual data extraction.

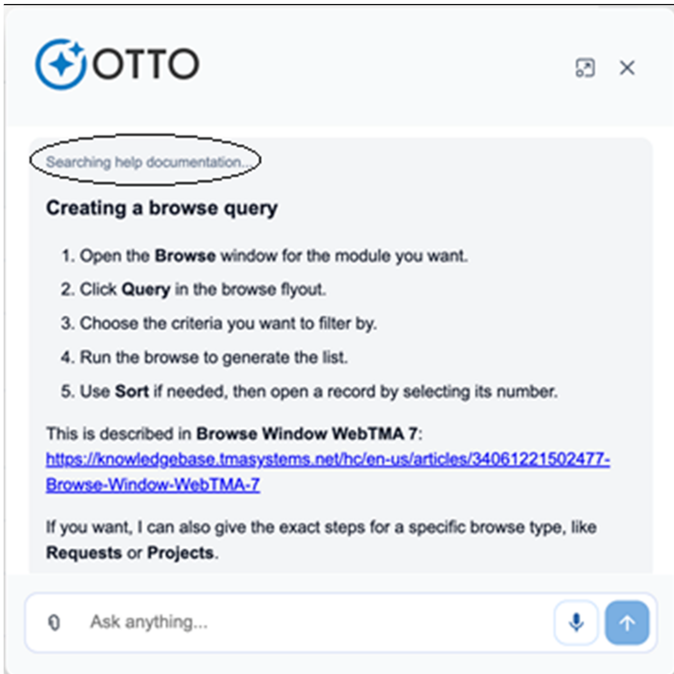


Path: *Transactions > Work Order > Records-Action Menu*



Flyout for *Enter Survey Results*

OTTO Now Searches the Knowledge Base

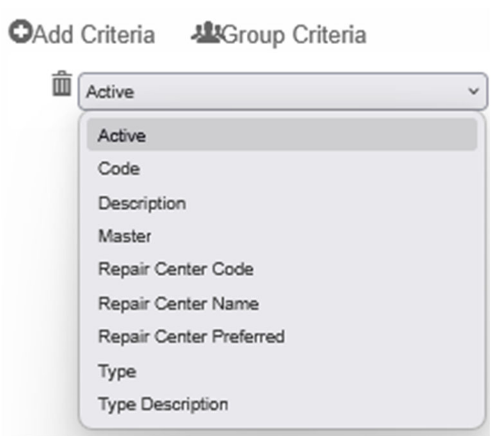


Summary: OTTO, the new AI Work Order Assistant, now draws from the WebTMA Knowledge Base to help answer your questions.

Details:

When an appropriate article is found, OTTO gives you a summary of how-to steps as well as a URL to see the complete article in the Knowledge Base.

Custodial Template Query Additional Fields



Path: *Transaction > Custodial > Custodial Template*

Summary: More fields have been added to the selection drop-down for the *Custodial Template* window.

Details:

The following have been added for selection:

- Active
- Repair Center Code
- Repair Center Name
- Repair Center Preferred

For those who use the additional Custodial module, this provides a way to search for records for the specific characteristics.

Transfer Parts Budget Code Criteria Added

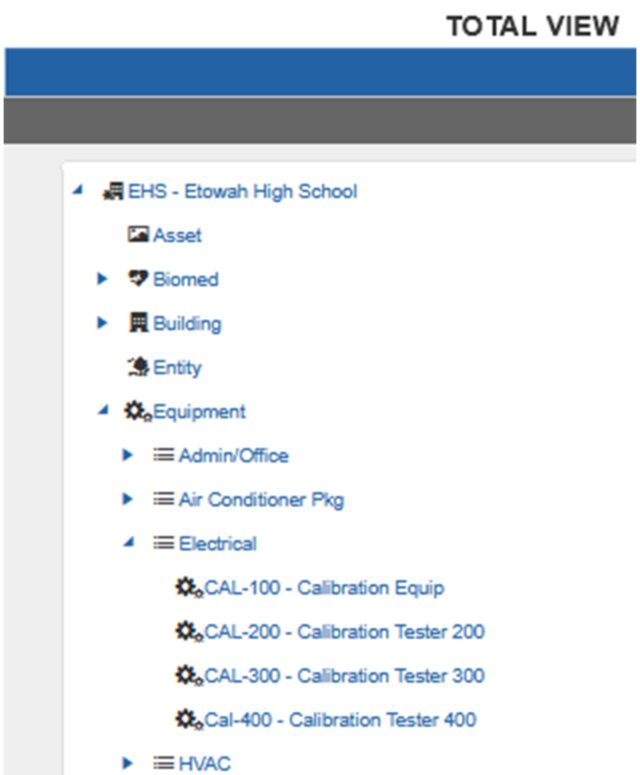
Path: *Material > Parts > Transfer Parts*

Summary: The *Transfer Parts* query window now includes *Budget Code* as a criterion.

Details:

This addition allows you to set up a query to track or search for specific Budget Codes or for transfers without a Budget Code.

VOC – Total View Enhancement



Path: *File > Total View*

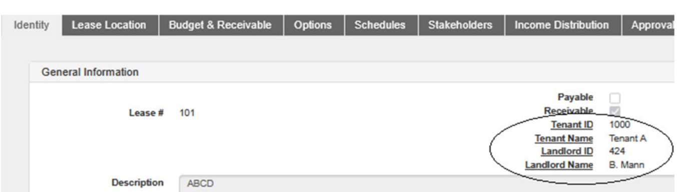
Summary: The *Total View* window now shows both the Code and Description as well as Type and Subtype if it exists.

Details:

If your naming conventions or descriptions are generic, the additional information helps you identify the correct item and location.

This is an April Voice of the Customer enhancement. It is a feature requested by New York State Department of Environmental Conservation. 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.

VOC – Lease Records Show Tenant & Landlord Simultaneously



Path: *Organization > Lease Management > Records / Identity Tab*

Summary: Both the Tenant and the Landlord are visible on all Lease records.

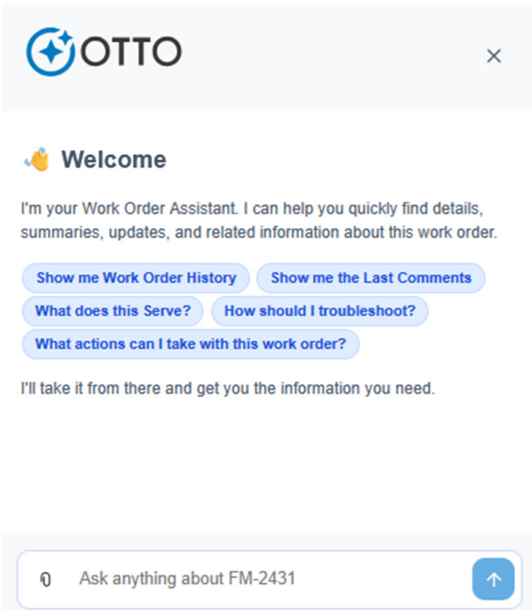
Details:

Previously, either the Tenant was visible for a Landlord record, or the Landlord was visible for a Tenant record.

This change allows you to generate a Report that includes both or to make a printed copy.

This is an April Voice of the Customer enhancement. It is a feature requested by University of Minnesota College System. 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.

OTTO – AI Work Order Assistant



Path: *Landing Page-Single Work Order OTTO Popup*

Summary: Our AI Work Order Assistant called OTTO gives you answers to questions about details, history, or other information about a Work Order. You can search for "how do I…" instructions and ask questions in real time. If you want to know what OTTO can do for you, click a starter question.

In addition to the Landing Page access mentioned below, User records have a new *Enable Otto* setting in *Admin > User Management > Records / Preferences* that must be granted.

Details:

OTTO is an AI-powered assistant in WebTMA that helps users quickly get answers such as work order history, recurring issues, and other questions.

You can diagnose and resolve problems for specific work orders faster without manually searching through records or linked documents.

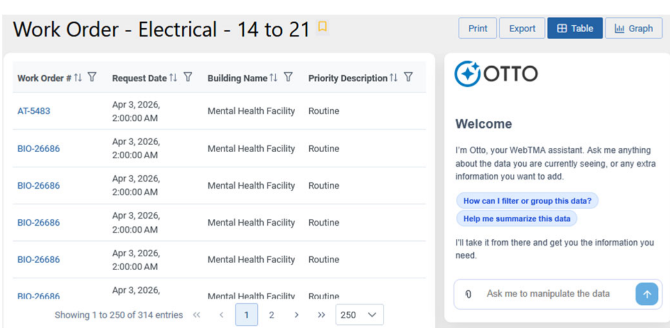
Currently, OTTO is available on the *Landing Page* and the *Browse Query* window (described in the next topic). If you have not Granted access to the *Landing Page* yet, follow the easy instructions here.

On the Landing Page, you can ask questions about a specific Work Order using this icon  found with other icons on the Work Order line.

For more general Work Order questions use this icon  at the lower right.

A more comprehensive description of OTTO with tips for example prompts is here.

OTTO and Browse Queries



Summary: In addition to the Landing Page, OTTO is also present on the *Browse Queries* window.

Details:

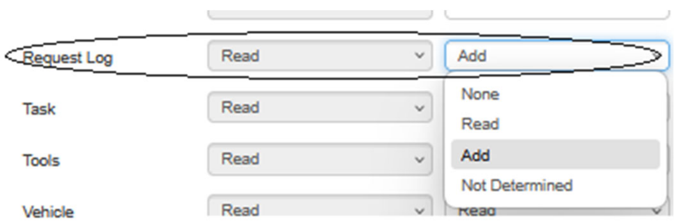
Here the OTTO window opens once you select a *Form* and *Query*. Like other OTTO windows, you can ask questions about the data.

You can display the data in a list or graphically where applicable. Click the 

button once the list is displayed.

Path: *Reports > Browse Queries*

Technician Role Now Has 'Add' for Request Log Window Access



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

Summary: 'Add' permission has been included in the Technician Role selections for Request Log on the *User / Window Access* Tab.

Details:

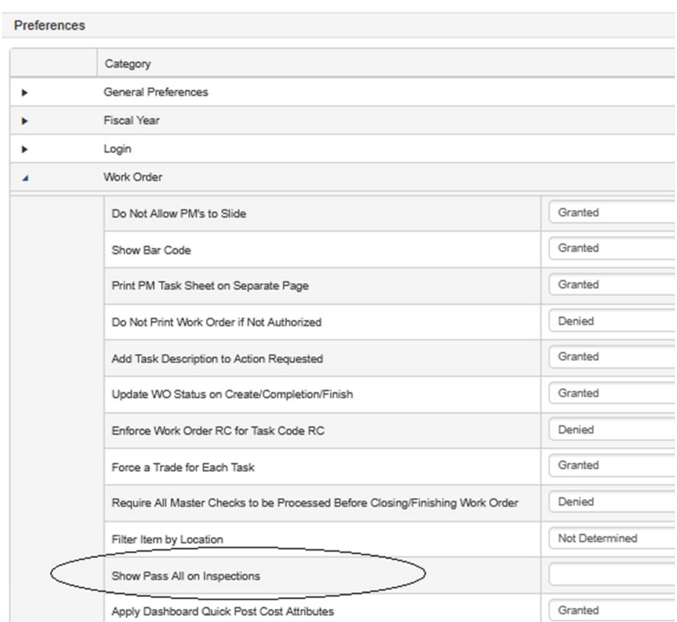
Previously, the only options were *Read*, *None*, or *Not Determined*.

This enhancement was made to allow Technicians who use WebTMA mobile to use the Request function.

Previously, only those with a User Role could add a request from WebTMA mobile.

NOTE: Technicians who log in to the main application can also add requests directly to WebTMA when this permission is added.

New Client Info Preference for Inspections Pass All



Path: *Admin > Client Info / Preferences Tab–Work Orders*

Summary: If you use the additional General Inspections module, you have the option to show or hide the *Pass All* check box on the *Inspection* or *Item Check List* flyouts.

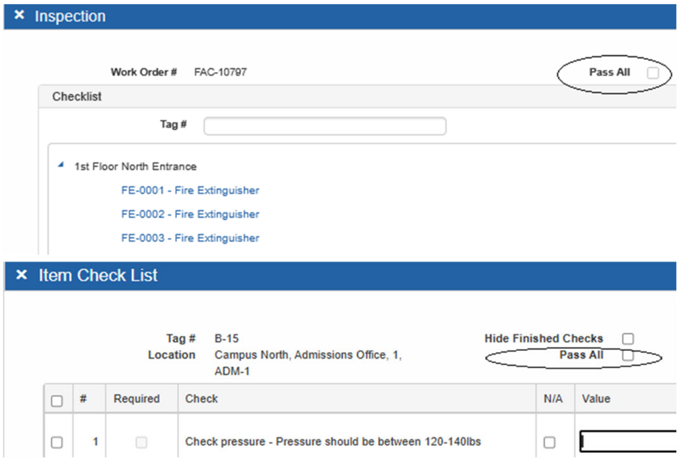
Details:

When the *Show Pass All on Inspections* Preference is Granted, the *Pass All* check box is shown.

If you want to allow your Technicians to use the *Pass All* option, Grant the Preference.

This applies only to General Inspections in the web application because the web version of Master Checks does not have the option.

For **WebTMA mobile**, this applies to General Inspections **and** Master Checks because the option is available for both on the mobile device.



Cost Unit of Measure for WO and QP

Summary: The *Post Other* costs option on the *Work Order / Costs* Tab and in *Quick Post > Quick Post Other Charges* now have the option to indicate the type of *Unit* for non-maintenance-worthy items.

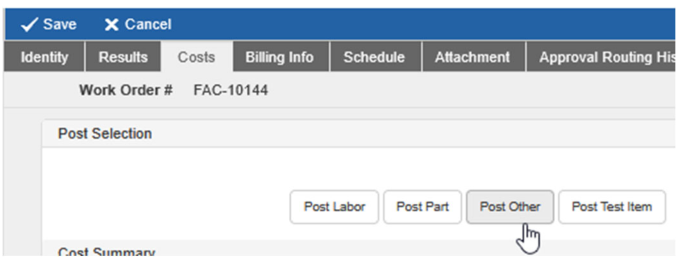
Details:

Previously, the field only allowed you to select rental time periods.

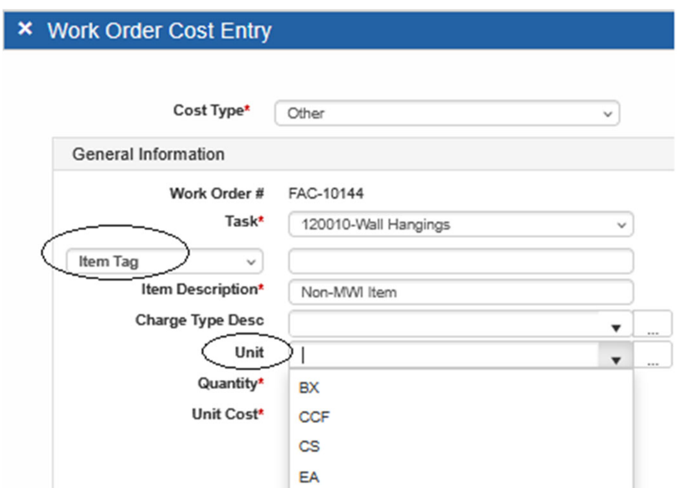
If you leave the default *Item Tag* on display and do not select an MWI item, you can enter your own *Description* and choose a *Unit* that corresponds to the object.

The selections available are those that you have created in *Organization > Lookups > Units of Measure*.

This new feature allows you to enter the appropriate unit for more than just rental of MWI items.

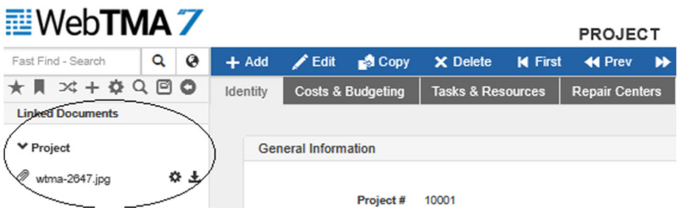


Path: *Transactions > Work Order > Records / Costs Tab-Post Other*



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

Request Conversion to Project Includes Linked Documents



Path: *Transactions* > *Project* > *Records*

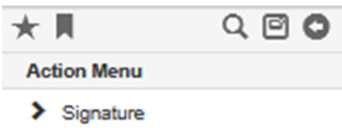
Summary: When a Request is converted to a Project, any linked documents with the Request are also attached to the Project.

Details:

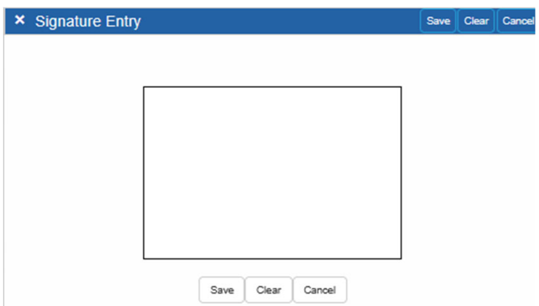
Previously, the attached document was not added to the Project record.

This allows all information made with the Request to be included on the Project record. These can include linked documents and images provided by a requestor for projects like event planning and large remodels.

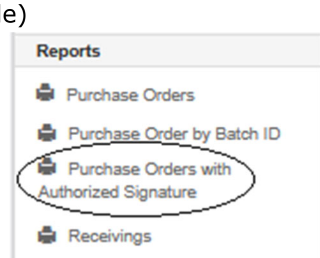
VOC – eSignature Added to User Record



Path: *Admin* > *User Management* > *Records* (Edit mode)



Path: *Admin* > *User Management* > *Records* (Edit mode)



Path: *Material* > *Purchase* > *Purchase Orders-Reports*

Summary: You can now store a signature with a User record that can be applied to a specific Purchase Order report.

Details:

The *Signature* link on the User record Action menu is available in *Edit* mode. Click the link for the same standard *Signature Entry* process used with Keys and other modules.

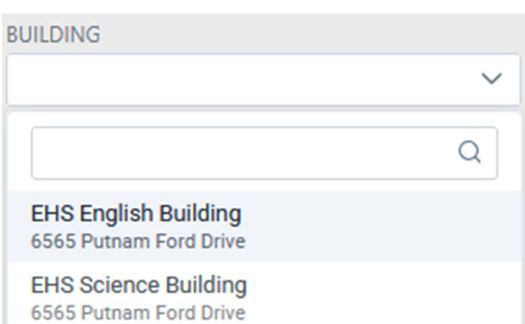
Purchase Order records that are approved are stamped internally with the authorizer's User ID.

When you run the report named *Purchase Orders with Authorized Signature* (available on the *Purchase Order* window), the authorizer's signature is automatically applied to the report if it is authorized by a user with a stored signature.

This allows you to print an electronic or paper report with a signature.

This is an April Voice of the Customer enhancement. It is a feature requested by Empresas Fonalledas. 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.

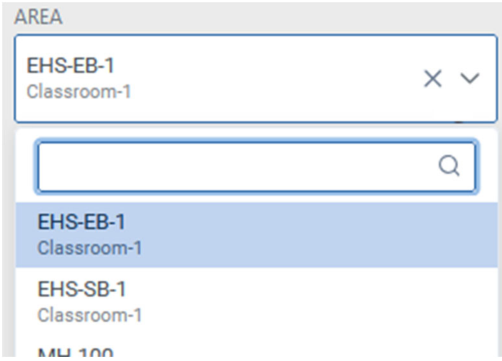
VOC – SRP Building & Area Fields Include Second Line



Summary: When you use a Building or an Area field in your Service Request Portal forms, a second line is automatically included.

Details:

The Building selection drop-down includes the contents of both the Building *Name* field and *Address*



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

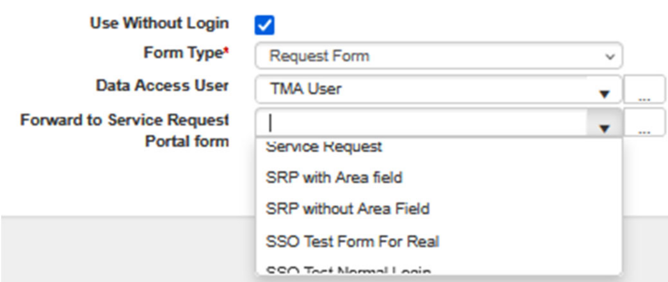
Line 1 field as seen on the *Organization > Building / Identity* Tab.

The Area selection drop-down includes the contents of both the Area *Location ID* and the *Area Description* as seen on the *Organization > Areas / Identity* Tab.

This change helps your Technicians easily locate the site where work is to be performed.

This is an April Voice of the Customer enhancement. It is a feature requested by Banner Health. 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.

Service Request Form Forwarding to Service Request Portal



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

Summary: The Service Request Form (SRF) is not WCAG 2.1 compliant; however, Service Request Portal (SRP) forms are compliant. If your request forms need to be WCAG 2.1 compliant, you can now forward an existing URL to an SRP.

We have created this option for clients who don't want to deploy new URL links or pages to users or a web site. A new field on the SRF window allows you to forward the URL to an existing SRP form.

Details:

The first requirement is that you have forms in the SRP. You can redesign or reuse the layout from your SRF forms.

The SRP forms meet the new accessibility standards.

Go to the *Admin > Form Attributes > Service Request Form* window:

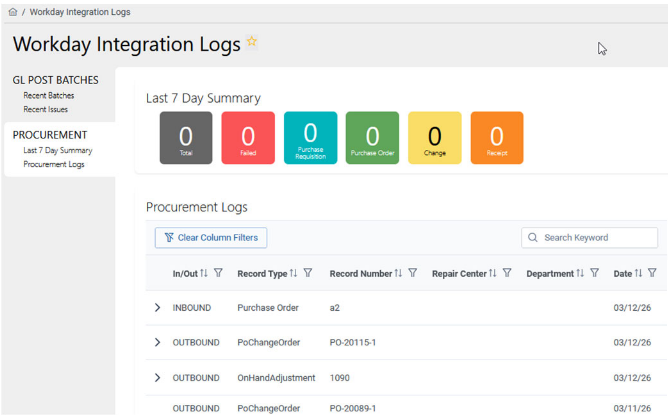
1. Open the desired record.
2. Edit the form.
3. Use the new *Forward to Service Request Portal form* field drop-down.
4. Select one of the SRP forms.
5. Save.

The SRP form uses the original URL sent to your users for Service Request Forms.

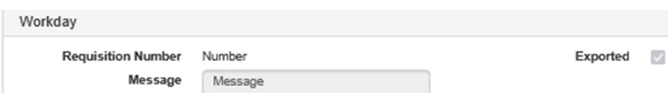
NOTE: This does not apply to those who use the Requestor Login.

March 24, 2026

Workday Procurement Integration



Path: *Admin > Workday > Integration Log*



Path: *Material > Purchase > Purchase Requisitions*

Summary: A new turnkey Workday integration for Procurement is now available. This is an additional module.

Details:

If you are a Workday client, you can use this new module to automatically integrate and sync your purchasing workflow between WebTMA and Workday. The two are fully integrated. No setup coding or IT involvement are needed. All you need are a few portal keys from Workday.

The module does the following for WebTMA 7 records that have a Workday reference:

Validate Vendor. Connects WebTMA 7 to Workday to authenticate Vendors in WebTMA and ensure vendor data consistency between both systems. Polled daily.

Validate Part. Connects WebTMA 7 to Workday to validate Part records and maintain alignment of inventory across platforms. Polled every 10 minutes.

Export Purchase Requisitions. Export Purchase Requisitions from WebTMA 7 to Workday and streamline requisition processing in Workday. Polled every 10 minutes.

Import Purchase Order. Import Purchase Orders created in Workday into WebTMA 7 and ensure visibility of Workday-generated POs in WebTMA. Polled every 10 minutes.

Export PO Change Order. Modify the Workday Purchase Order after it has been sent to Workday by exporting a *PO Change Order* from WebTMA to support change order processing and synchronization between systems. Polled every 10 minutes.

Export On-Hand Adjustment. For received items, automatically send adjustment lines from WebTMA 7 to the related Workday Purchase Order to align inventory and financial data following adjustments. Polled every 10 minutes.

Export Invoice Information. Send Accounts Payable Invoice information from WebTMA 7 to Workday and facilitate financial processing and tracking in Workday. Polled every 10 minutes.

See a Consolidated View. The *Integration Log* in WebTMA 7 shows a list of every inbound or outbound action that has taken place between

WebTMA 7 and Workday for traceability and troubleshooting of integration activities..

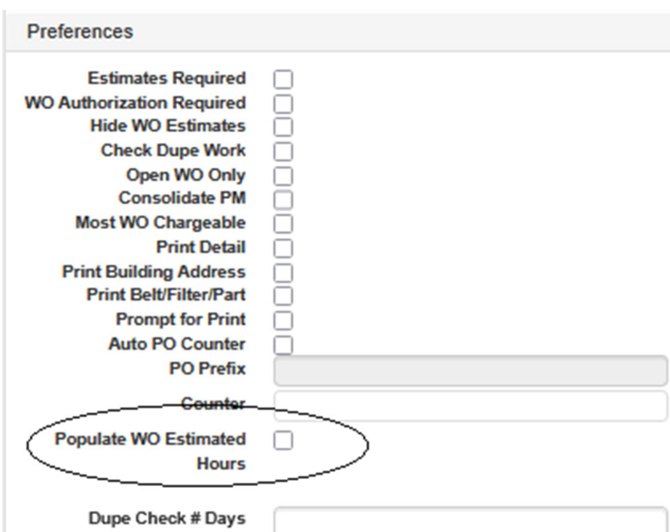
The following windows include a Workday section like the example at left:

- Purchase Requisition
- Purchase Order
- Vendor
- Accounts

Enabling this interface creates a seamless integration between **Workday** and **WebTMA 7**, which eliminates manual data entry and reduces the risk of discrepancies between systems. This ensures that procurement and maintenance operations stay aligned in real time.

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

New Repair Center Preference – Populate WO Estimated Hours



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

Summary: A new *Populate WO Estimated Hours* check box has been added to the *Preferences* section of the *Repair Center* window.

Details:

When the box is checked, it enables automatic completion of the *Estimated Hours* field on the *Work Order* window.

See the next topics for a discussion of this feature.

Auto-Complete Estimated Hours for Non-PM Work Orders

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

Summary: If your Repair Center has the *Populate WO Estimated Hours* Preference checked (see the previous topic), the *Estimated Hours* field on the *Work Order* window can be completed automatically.

Details:

WebTMA uses values from the *Task* window *Labor Standard* field.

If the WO has multiple Tasks, WebTMA calculates the sum of *Labor Standard* values from all Tasks.

With this new feature, you know at-a-glance the hours needed to complete the work.

When the conditions are met, the feature also applies to Work Orders created using Auto Attendant or Inspection Findings.

If you manually enter a value in the *Estimated Hours* field, the feature does **not** override your entry.

Auto-Complete Estimated Hours for PM Work Orders

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

Summary: If the PM Repair Center has the *Populate WO Estimated Hours* Preference checked, the *Estimated Hours* field on the *Work Order* window can be completed automatically.

Details:

WebTMA looks to the *Est. Time* field on the *PM Schedule Entry* flyout for a value.

If no value is entered on the flyout, the *Labor Standard* from the *Task* window is used.

With this new feature, you know at-a-glance the hours needed to complete the work.

If neither of these windows contains a value, the WO *Estimated Hours* field remains blank.

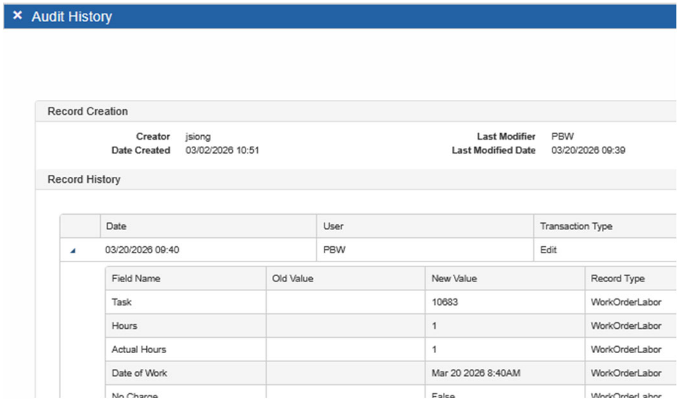
If you manually enter a value in the *Estimated Hours* field, the feature does **not** override your entry.

WO Audit History Shows Time & Attendance Labor Cost

Summary: The *Show Audit History* on the Work Order Action Menu now includes entries that are made from the *Time Manager > Time & Attendance* window.

Details:

We have expanded the *Work Order - Show Audit History* window to include information from *Time Manager > Time & Attendance*. With this



Path: *Transactions > Work Order > Records-Show Audit History*

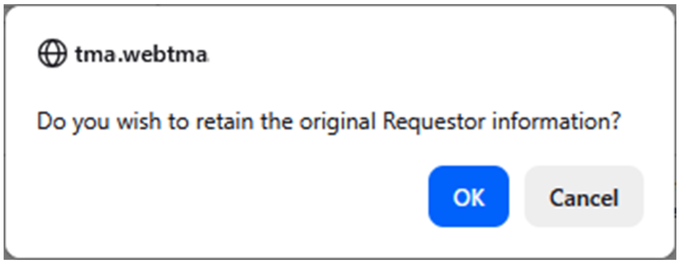
enhancement, you can now see labor entered from this window.

You no longer have to track down information from several sources. Now you can see it in one place.

With this enhancement, you can see labor cost entries on the *Audit History* window that originated from the *Work Order / Costs* Tab and the *Time & Attendance* window.

March 17, 2026

VOC – Requestor Information Retained on WO Copy



Path: *Transactions > Work Order > Records*

Summary: When you copy a Work Order, you now have the option to retain the Requestor fields (name, phone, email) information.

Details:

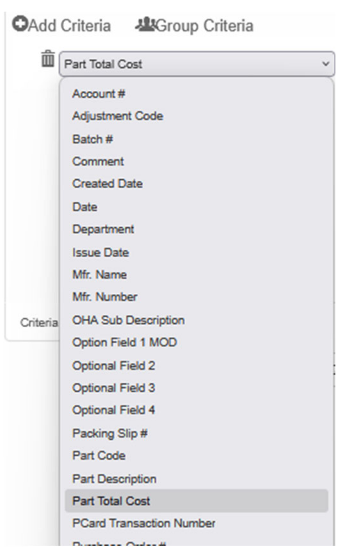
Previously, when you clicked *Copy* on the WebTMA toolbar, the contents of the *Requestor* fields were not carried over to the copied record.

With this release, a prompt asks if you wish to retain the original Requestor information. Click *OK* to keep the information, *Cancel* to remove it.

Some clients prefer to keep the original Requestor, but others do not. This is another way WebTMA continues to give all our clients options to maintain their individual workflow process.

This is a March Voice of the Customer enhancement. It is a feature requested by Dallas College in the WebTMA Community. 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.

VOC – New OHA Query Column ‘Part Total Cost’



Path: *Material > On-hand Adjustments-Find*

Summary: A new column selection, *Part Total Cost*, has been added to the *Find* flyout for the *On-Hand Adjustments* window.

Details:

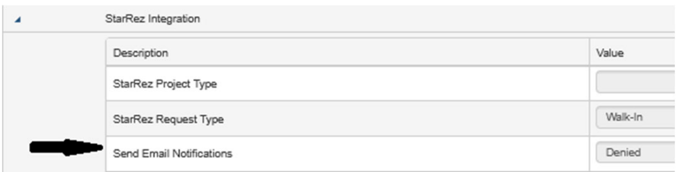
The new column is calculated as:

Unit Cost x Quantity = Part Total Cost

While the information has been available in a standard report, this new column gives you immediate information about the total cost impact of any adjustments, and it can be used to display statistics on the Dashboard.

This is a March Voice of the Customer enhancement. We would like to thank ZF Lifetec 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.

VOC – StarRez Integration Notification Configuration



Path: *Admin > Client Info / Preferences*

Summary: If you use the StarRez interface to submit requests to WebTMA, you can elect to notify the requestor when StarRez requests are updated.

Details:

If you Grant *Send Email Notifications* in *Client Info / Preferences*, WebTMA sends notifications to your customers that submitted the request.

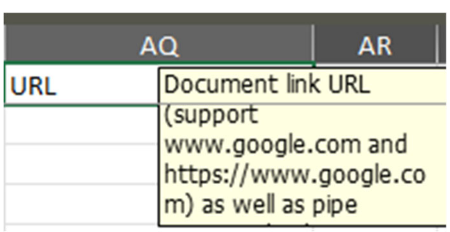
We know not all clients want this as the default, so we made it a *Client Info / Preference*. **By default, the setting is Denied which was the previous behavior in WebTMA 7**. If you want to use it, be sure it is Granted.

Customers that submitted a request from the StarRez Portal will receive the same notifications that have been configured in your WebTMA application.

NOTE: If you use our API Platform, you can set the Notify Me feature there instead. In the API call, you can update how you call the StarRez Integration API and include the NotifyMe parameter in the payload.

This is a March Voice of the Customer enhancement. We would like to thank George Fox University, the University of San Diego, the University of Louisiana at Lafayette, and others for submitting this suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Mass Import – Equipment and Vehicles Have New Fields and URL



Path: *Mass Import / Templates*

Summary: The Mass Import Templates for Equipment and Vehicles now include an option for Linked Document URLs and several more fields.

Details:

The template allows you to enter URLs in the template and supports www.google.com, https://ww w.google.com, and the pipe (|) to separate multiple URL entries.

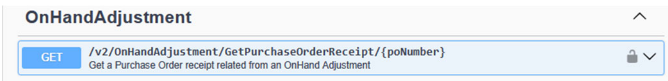
Having these new fields and the Linked Document URL allows for more accuracy and saves you time and keystrokes.

Here is a list of the new fields:

EQUIPMENT	VEHICLES
Attached to Vehicle	Body Type
Device #	Delivery Date
Life Expectancy	Engine Liters
Original Cost	Engine Type
Owner's Department	Fleet Number
Purchase Date	Fuel Type
Purchase Order #	Fund Type
Registered Date	Model Year
System SubType	Purchase Cost
	Tire Size/Brand

March 3, 2026

API – OHA Endpoint for PO Receipts



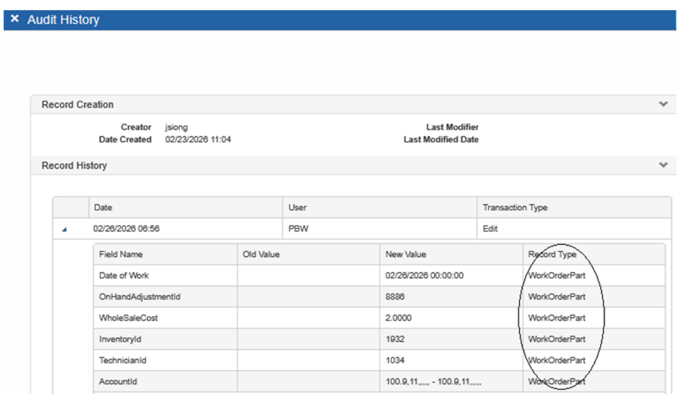
Summary: An On-Hand Adjustment for Purchase Order Receipts now has a GET API endpoint added to the API Platform.

Details:

You can use this endpoint to allow your external ERP software to call for Purchase Order received.

This feature is valuable to assure accuracy and save time.

WO Show Audit History Now Shows QP Part/Material Costs



Path: *Transactions > Work Order > Records / Action Menu-Show Audit History*

Summary: The *Show Audit History* on the Work Order Action Menu now includes Part cost entries that are made from *Quick Post* windows.

Details:

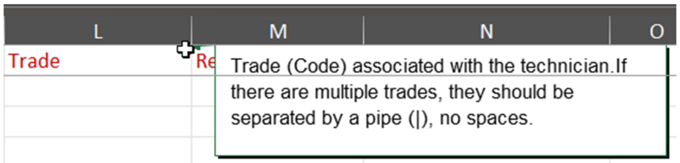
We have now expanded the *Work Order - Show Audit History* window to include information from *Quick Post Cost* and *Quick Post Material*. With this enhancement, you can now see Parts and Materials entered from Quick Post.

You no longer have to track down information from several sources. Now you can see it in one place.

With this enhancement, you can see cost entries on the *Audit History* window that originated from the *Work Order / Costs* Tab, specific *Quick Post* windows, and from the new *WebTMA* mobile application.

February 17, 2026

Technician Mass Import Now Supports Multiple Trades



Path: *Admin > Mass Import / Templates*

Summary: The new *Technician* Template for Mass Import now supports importing multiple Trades for Technicians.

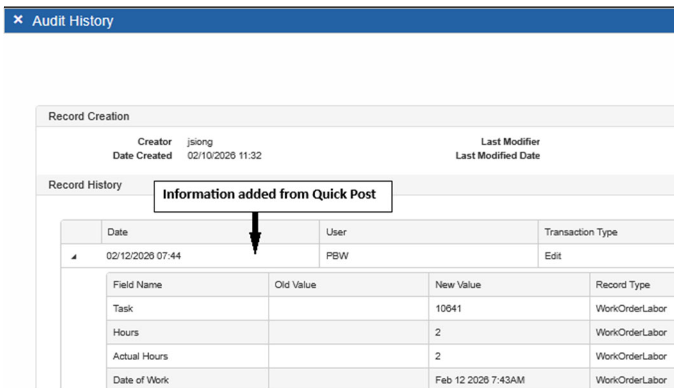
Details:

This new feature allows you to save time by importing new or updated information about your Technicians such as multiple Trades and multiple Repair Centers.

Using this feature, you can easily update charge rates, reclassify your Technicians, or add new employees with a single import.

When you have multiple Trades or Repair Centers, separate the entries using the vertical bar or pipe (|) with no spaces between entries.

WO Show Audit History Includes Cost Events from Quick Post



Path: *Transactions > Work Order > Records / Action Menu-Show Audit History*

Summary: The *Show Audit History* on the Work Order Action Menu now includes cost entries that are made from *Quick Post* windows.

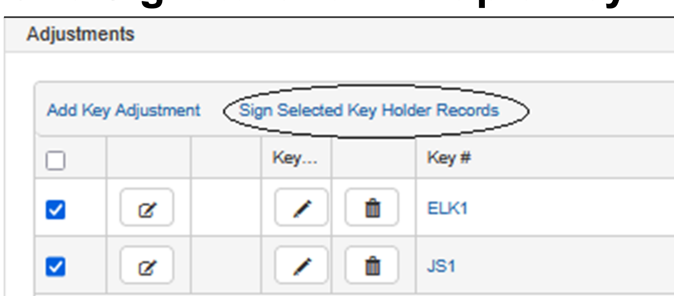
Details:

We expanded the *Work Order - Show Audit History* window to include information from *Quick Post* Cost, Time & Labor, and Other. You no longer have to track down information from several sources. Now you can see it in one place.

With this enhancement, you can see cost entries made from the *Work Order / Costs* Tab, the *Quick Post* windows listed above, and from the new *WebTMA* mobile application.

NOTE: Quick Post Materials will be a quick follow.

One Signature for Multiple Key Adjustments

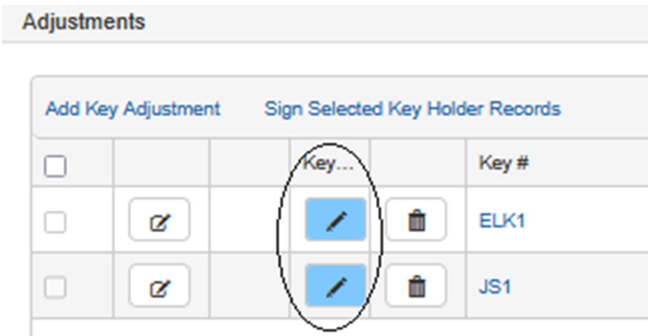


Summary: When you make adjustments to several keys for one person, you can select all key lines and the person only has to sign once.

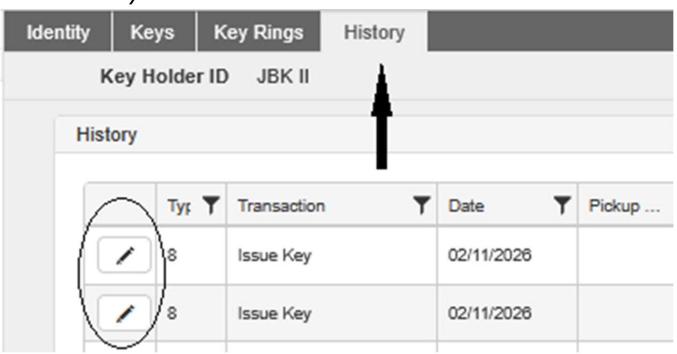
Details:

The convenience and time saved by this feature is substantial. For example, when Technicians pick up several keys at one time, they only have to sign once instead of individually for each key.

Once the signature is added, the signature icon for each selected line has a different background color



Path: *Material > Key Management > Key Adjustments–8 Issue Key*



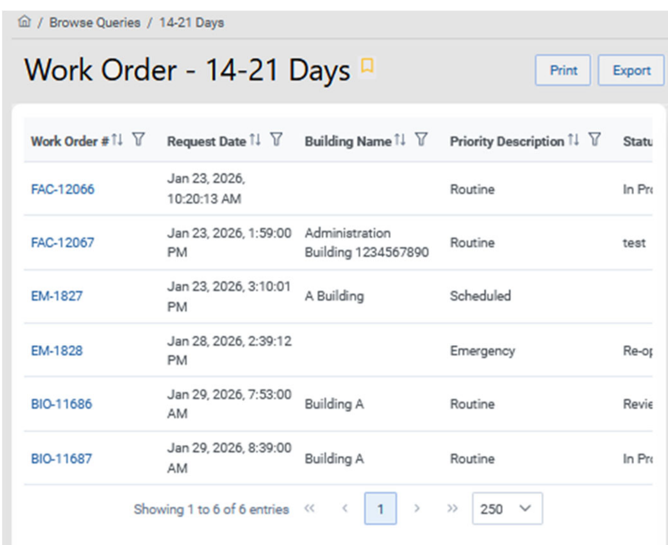
Path: *Material > Key Management > Key Holder / History Tab*

before the record is saved. You can click the icon to view the signature.

After the record is saved, the signature icon has a white background and can also be clicked to see the signature, but it cannot be changed.

NOTE: The signature carries over to the *Key Holder / History* Tab.

Browse Queries Window Now Has Print and Export



Path: *Reports > Browse Queries*

Summary: The central location for finding all your saved queries, the *Browse Queries* window, now has *Print* and *Export* capability.

Details:

Frequently, you need to send your query information to others. Being able to print or export all or part of a query gives you the convenience of looking through all system queries from a central location and printing or exporting whatever you need to anyone, anywhere.

Currently, the *Print* option is only available on the Work Order *Form* and returns the standard Work Order Report, but it will be available for others in time.

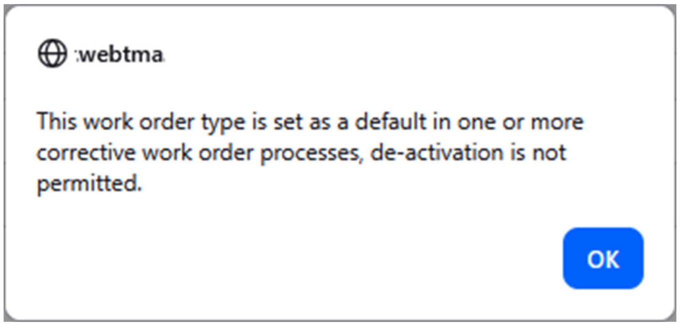
When you have selected a *Form* and *Query*, the resulting list includes *Print* and *Export* buttons at the top right of the page.

The *Export* button gives you the option to download a page or all pages to an Excel spreadsheet where you can review and manipulate the results.

On the Work Order Form, click the *Print* button to see check boxes for each row, and the *Print* button changes to *Submit*. Select the desired lines and click

Submit to download a .pdf file of a Work Order Report.

Deactivation Change for Certain Records



Summary: Default information used for **Corrective Work Orders** for *Master Checks* or *General Inspections* now prevents you from deactivating certain records until those records are amended. If you clear the *Active* check box on the records, you are alerted that the action is not permitted.

Details:

This change applies to the following records:

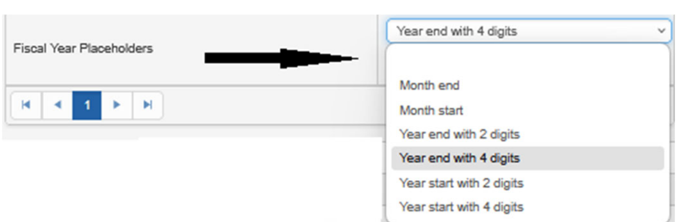
- Priorities (Lookups)
- Work Order Types (Lookups)
- Repair Center
- Task
- Trade

For records included in one of the Corrective Work Orders processes (Master Checks or General Inspections), an attempt to deactivate the record results in an alert, and you are unable to deactivate the record.

We want to assure that defaults for these processes do not interfere with completing work requests from the new WebTMA mobile application.

Note that, if the record is no longer a default for Master Checks or General Inspections, it can be deactivated.

Client Info Fiscal Year Preferences Options Added for Utilities



Summary: If you use the Utilities additional module, you can now add a *Fiscal Year Description* and include *Fiscal Year Placeholders* for the description of the Fiscal Year.

Details:

This functionality augments the *Starting Month* and *Starting day* of the Fiscal Year already in place. For now, this **only applies to the Utilities module**.

As illustrated in the following topic, the *Fiscal Year* field on the *Utility Ticket* window is autocompleted when you create a new record. It is based on these Fiscal Year settings.

The new fields give you more flexibility in the date format. Use the + plus button to add Placeholder selections similar to using keywords in Email settings.

Path: *Admin > Client Info / Preferences*

Enter text in the Fiscal Year Description field followed by your desired Placeholder selection. See examples below.

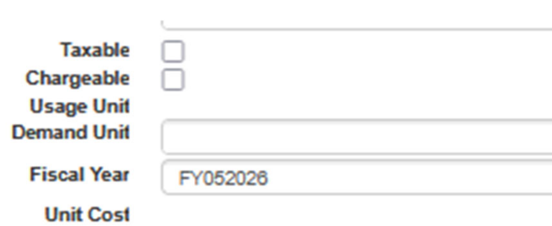
Here are the abbreviations you can add from the Placeholders to the Description.

- {ys4} - year start with 4 digits: 2026
- {ys2} - year start with 2 digits: 26
- {ye4} - year end with 4 digits: 2027
- {ye2} - year end with 2 digits: 27
- {ms} - month start with 2 digits: 02
- {me} - month end with 2 digits: 01

Examples of description text entries:

- FY{ye4} - FY2027
- FY-{ys2}-{ms} - FY-26-02

Utility Ticket Fiscal Year Auto-Completion Added



Path: *Organization > Utility > Utility Ticket / Identity Tab*

Summary: The *Fiscal Year* field added to the *Utility Ticket* window is now completed automatically.

Details:

When you enter the *Billing End Date* on a new *Utility Ticket* record, the *Fiscal Year* field is auto-populated based on the settings made by your WebTMA system administrator in *Admin > Client Info / Preferences* as described in the previous topic.

Having a Fiscal Year identified is helpful in tracking your Utility records and when creating reports.

February 3, 2026

VOC – Mass Import Technician Template

Path: *Admin > Mass Import / Templates*

Summary: A new *Technician* Template has been added to Mass Import.

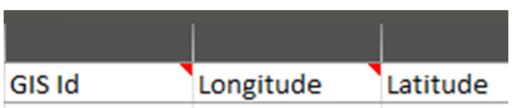
Details:

You now have the opportunity to save time by importing new or updated Technician information such as Charge Rate, Repair Centers, and many other fields.

Currently, only one Trade is imported; however, that will change soon.

This is the February Voice of the Customer enhancement. It was a feature request from the WebTMA Knowledgebase Community and had several up votes. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Mass Import for MWI Now Has GIS Fields



Columns added to the Templates listed at the right

Summary: Several Mass Import Templates now include GIS-related fields for maintenance-worthy items (MWI).

Details:

Importing this information allows you to use the information with TMA's internal GIS map and MapIt! function.

The GIS fields are:

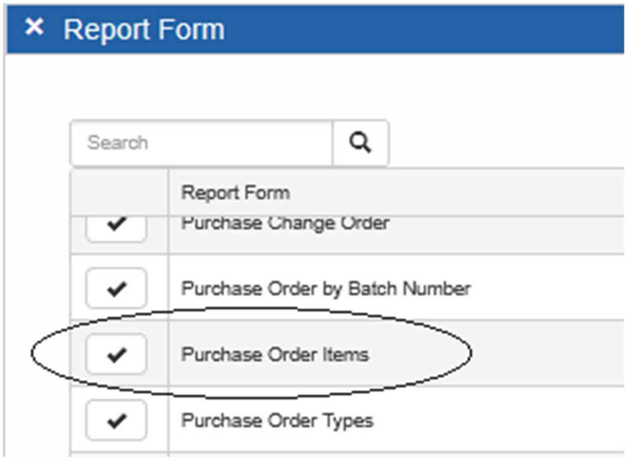
- GIS Id
- Latitude
- Longitude

The fields have been added to the following Templates:

- Area
- Asset
- Building
- Equipment
- Floor

In addition, the Area Template now includes *Area Function*.

Report Writer New Form – Purchase Order Items



Path: *Reports > Report Writer / Identity Tab*

Summary: A new *Report Form*, *Purchase Order Items*, has been added to the *Report Writer* window.

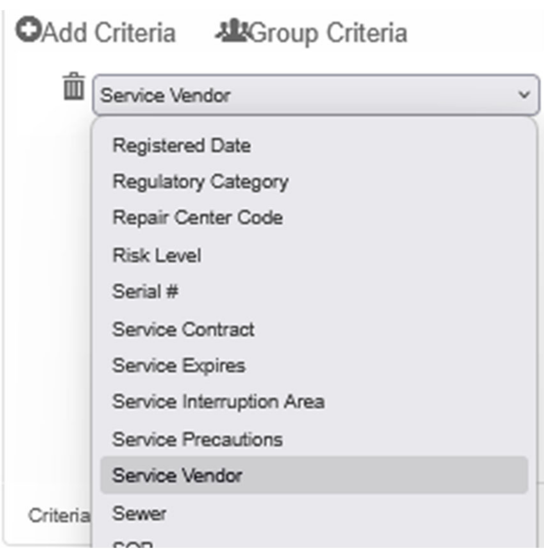
Details:

This Form was added to allow you to report on distributions for Purchase Order items so you can see what distributions are connected to the items.

If you have previously wanted to include these items in your Purchase Order reports, this Form gives you the resource to do that.

The new Form groups PO Item numbers in your report.

Service Vendor Field Added to Equipment Search



Path: *Organization > Equipment > Record–Find*

Summary: *Service Vendor* is now available for queries and column selections for Equipment search and browse actions.

Details:

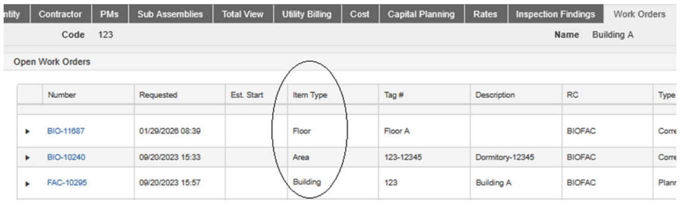
This is a free-form text field in the *Contact Information* Section of the *Equipment / Identity* Tab.

If you use it to identify the Service Vendor by name, phone, or other detail, you can easily search and query the field.

NOTE: Your WebTMA Administrator has the option to include the *Service Vendor* field.

Building Work Orders Tab Enhanced

Summary: We have enhanced the *Building / Work Order* Tab to include child locations. You now have a



Path: *Organization > Building > Building–Work Orders*

wholistic view of all work orders affiliated with the Building.

Details:

Work Orders for Areas and Floors that are associated with a Building are now visible on the *Building / Work Orders* Tab.

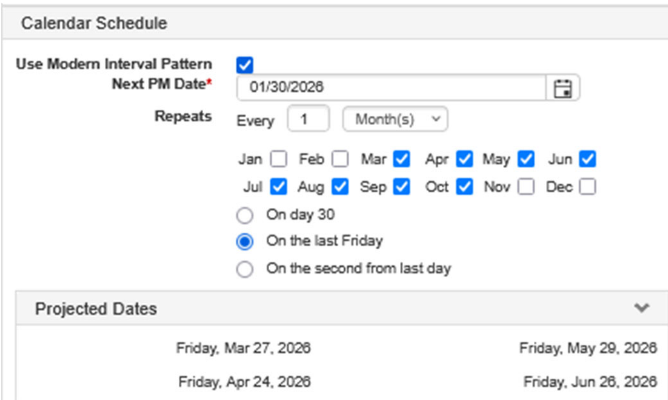
Work Orders written for Areas or Floors within the Building are displayed on both the *Areas / Work Orders* Tab and the *Building / Work Orders* Tab.

Work Orders for related Areas, Floors, and Buildings are reflected on the Facility record as well.

January 20, 2026

Release Notes for 2025, 2024, 2023, and 2022 is available in the Knowledge Base.

RRule Now Supports "By Month" Selection



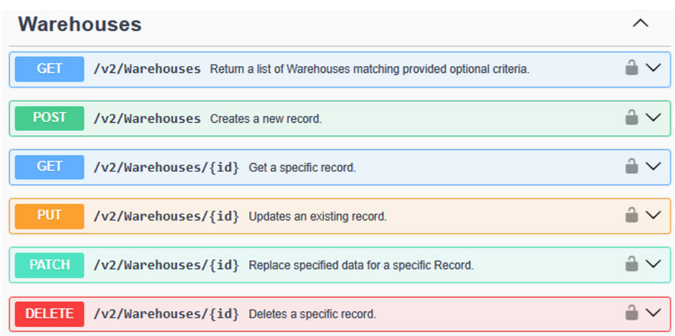
Summary: The RRule repeating pattern for recurring events such as PMs now gives you several configurations that allow you to specify specific months for your selected interval.

Details:

This allows you, for example, to select *Every 1 Month* but choose only the months that apply rather than all months. You can also specify certain days of the month.

You can use the same process for weekly, daily, and yearly.

Warehouse API Endpoints Added



Summary: Endpoints for Warehouses in WebTMA have been added to Swagger.

Details:

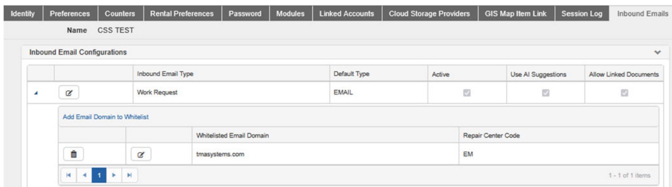
These are now available in the Swagger WebTMA Platform API.

These new APIs are fully described in our Swagger documentation.

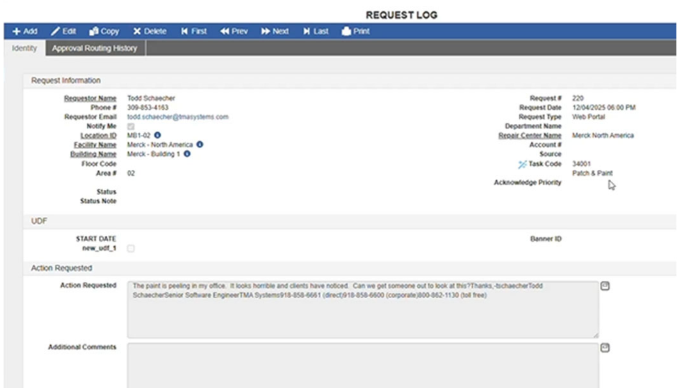
January 6, 2026

Release Notes for 2025, 2024, 2023, and 2022 can be found in the Knowledge Base.

VOC – AI Email Work Request



Path: *Client Info / Inbound Emails Tab*



Path: *Transactions > Request > Request Log*

Summary: If you have the Platform API module, you have the option to set up a standard "maintenance" email address for Requests. WebTMA can convert the message from this email address into a record in the *Request Log* window and optionally use AI to enhance the request record.

Details:

The process involves a certain amount of setup in *Client Info* using the new *Inbound Emails* Tab. This Tab is only visible if you have the additional Platform API module.

You can inform your Requestors of the new email address. If details about the Requestor are in *User Management > Requestors*, that information such as location and phone number are automatically inserted in a new AI generated *Request Log* record.

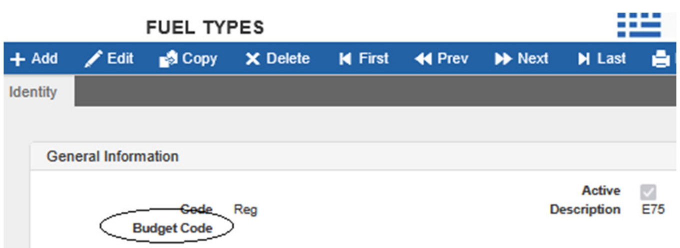
The requestor's message is included in the *Action Requested* field, and if you choose, AI suggests a *Task Code* based on the content of the message.

Fields that contain information suggested by AI are indicated by this icon .

NOTE: A separate document will be available for details on the full setup.

This is the January Voice of the Customer enhancement. It was presented in the Election for Direction during UC 2025. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

New Fuel Budget Code



Path: *Organization > Lookups > Fuel Types*

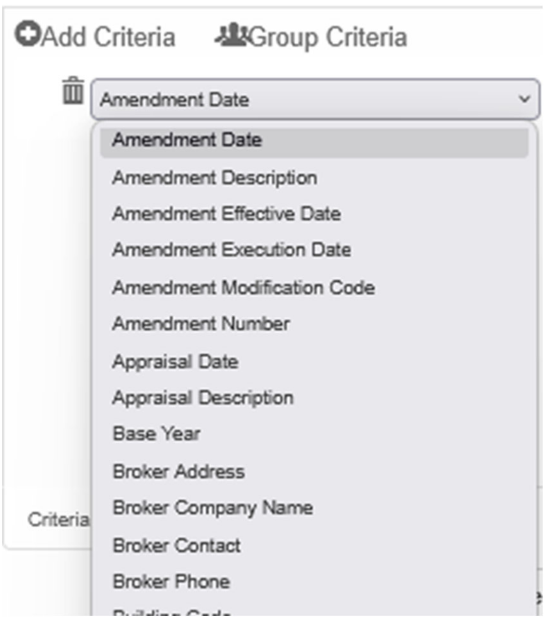
Summary: A new *Budget Code* field on the *Fuel Types* window applies to Credit Accounts for the *Fuel & Oil* window.

Details:

This applies to Credit Accounts and is set up in *Lookups > Fuel Types*.

The *Budget Code* field on the *Fuel & Oil* window applies to Debit Accounts.

Lease Management Search and Query Selections Added



Path: *Organization > Lease Management > Records*

Summary: New selections have been added to the drop-down list for Lease Management queries.

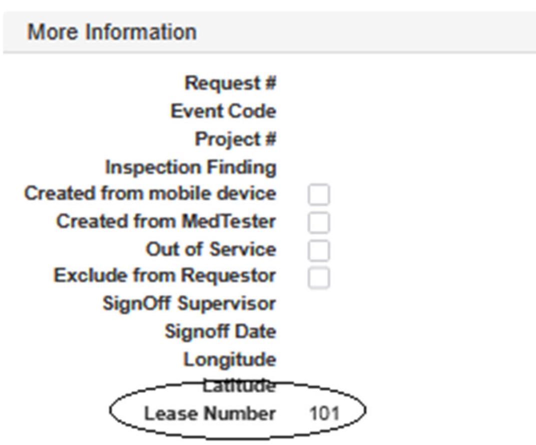
Details:

The searchable and reportable list now includes the following sections from the *Identity* Tab and their related columns:

- Brokers
- Amendments
- Appraisals
- Estimates
- Tax
- Responsibilities
- Punch List

In addition, Schedule information from the *Schedules* Tab is available.

Lease Number Field Added to Work Order



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

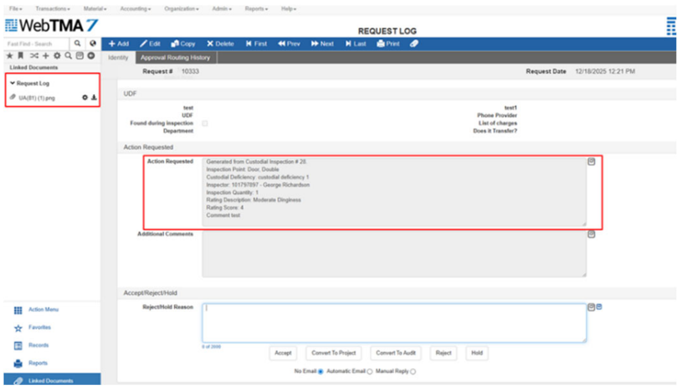
Summary: When you generate a Work Order from the *Punch List* section of Lease Management records, the *Work Order* window now includes a *Lease Number* field.

Details:

Since the additional Lease Management module includes a Punch List where you can generate a Work Order if needed, this helps you identify the source of the Work Order.

This is like Requests and Projects, that are also indicated as the source of a Work Order when applicable.

Custodial Point Request Details Added



Path: *Transactions > Request > Request Log*

Summary: When you create a Point request from the *Custodial Inspection* window, additional information is now included in the *Request* record.

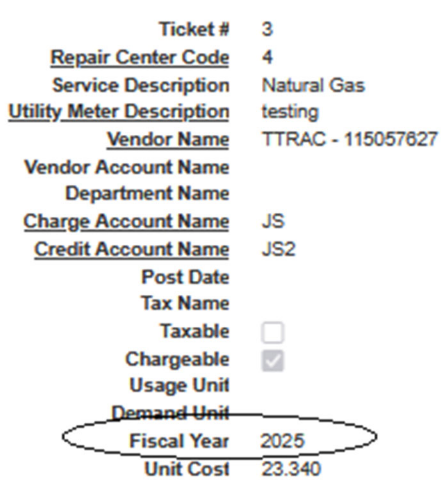
Details:

In the *Action Requested* field, you can now see the following information:

- Custodial Inspection #
- Inspection Code
- Inspector
- Custodial Deficiency
- Inspection Quantity
- Rating Description
- Rating Score
- Comments

In addition, any Linked Documents are added to the *Linked Documents* section of the Navigation panel.

Fiscal Year Added to Utility Ticket Window



Path: *Organization > Utility > Utility Ticket / Identity Tab*

Summary: The *Fiscal Year* field has been added to the *Utility Ticket* window.

Details:

You can enter the year of your choice.

NOTE: This field was available in a previous version of the application.

Progress on Database Views in Knowledge Base

Click to open https://knowledgebase.tmasystems.net/hc/en-

Summary: WebTMA has heard your requests for a complete list of database views. These are used for reporting by SaaS clients with Direct Database Connect or the Business Intelligence module. On-

us/articles/23648067588493-List-of-WebTMA7-Database-Views	premise clients are also urged to use these Views for reporting rather than query directly against transactional tables. **Details**: Although not fully completed, the Database Definitions section of the Knowledge Base currently has 415 views with more being added each week. The section includes a “List of WebTMA7 Database Views” article that is a table of the View names with a short definition. Many rows in the table are linked to the full View. Ultimately, the table will connect to Views for all rows. Click a link to open a full View in a new tab.