TMA Basics Guide

Version 8.1

TMA Systems, LLC

In our continuing endeavor to provide superior documentation, TMA encourages you to send your suggestions and comments about the documents to: documentation@tmasystems.com

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Understanding TMA

Introduction to the Guide

The TMA *Basics Guide* gives you an overview of standard conventions and how to use the basic functions of the TMA software.

If you are new to TMA software, this *Basics Guide* identifies the menus, commands, and conventions.

The chapters include instruction on:

- creating a basic work order
- posting labor
- closing the work order

Detailed information and instructions for all TMA functions are provided in the TMA *User's Guide*.

For those familiar with TMA software, this *Basics Guide* offers a quick reference for fundamental tasks.

The TMA *Basics Guide* has been written with the assumption that TMA Administrator and System setups have been completed.

Since the TMA software is a database application, a short review of database concepts and definitions follows.

What is a Database?

A database is a collection of one or more lists or Tables of information.

Many operations we use daily are based on database applications, for example:

- automatic tellers at the bank
- supermarket checkout
- airline reservations

Databases are made up of Tables, Records, and Fields.

Database Tables

The TMA software has many Tables (lists of information), such as:

- buildings
- rooms
- technicians
- warehouse inventory

When work orders are added to the system, they are actually added to a list of information or Table.

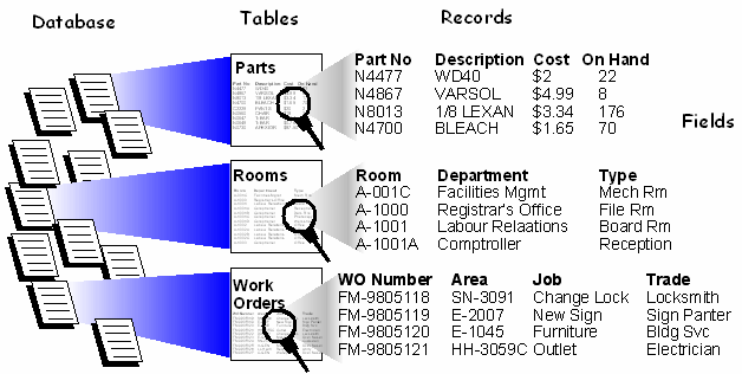
Database Records

Database Tables are composed of Records. Records are one of many line items within a database Table. For example, the TMA Parts Table contains many records. Each record contains detailed information about the individual parts that are kept in inventory.

Database Fields

Each Record (item) in a Table (list) requires different types of details. The details are called Fields. Certain Fields are required for each Table. For example, a Table that lists rooms will require the room number, building name, room type, and description.

Database Functions



A database application like TMA performs many different types of Functions, which affect the information stored in the database Tables. Database Functions usually do one of three things:

1. Add a new Record to a Table. For example, creating a work order adds a new work order record to the TMA Work Order Table.
2. Change one or more fields in an existing record. For example, when parts are issued, a transaction called an On-hand Adjustment changes the value of the Qty OH for that Part Record in the Part Table.
3. Search, find, and summarize information. Data contained in the TMA Tables can be summarized in an on-screen or printed report.

Summary

TMA is a database application that consists of Tables and Functions. The Functions add or change the values in the Tables. Examples of some of the TMA Tables include:

Facility

Building
Equipment
Vehicles

Some of the Functions performed by TMA software include:

- Adding, editing or deleting existing Records in a Table
- Scheduling a work order using the Scheduler
- Entering an On-hand Adjustment
- Adjusting the price of a part
- Running a report that lists a history of completed work orders for an Area

Chapter 2
Basic Navigation

Login

A shortcut icon is usually installed on the desktop to launch the TMA application. If you do not have a TMA icon or have not been given instructions on how to launch the software, contact your TMA System Administrator.

If you have the icon on your desktop, double-click the icon to launch TMA software. Depending on the type of connection your TMA System Administrator has selected, you may be asked to enter an ID and Password.

The term ‘user’ in TMA documents refers to the person who is logged in to the TMA software. The TMA System Administrator sets up user records and assigns each user a specific level of access.

All transactions, including adding or editing records, are registered under the current user’s ID. If a user logs in to a workstation and does not log off, all transactions made by other users from that workstation are attributed to the original user.

Caution If a user fails to log out of the system, anyone can use the workstation and operate the software with the same level of access as the user currently logged in.

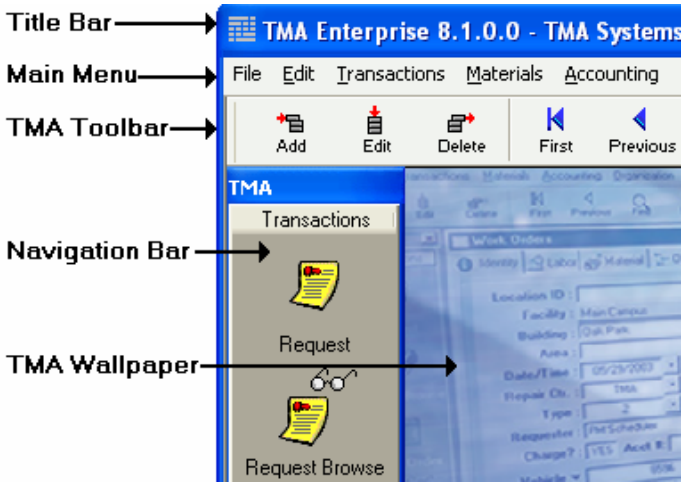
Login Messages

When logging in, you may receive error messages. If so, contact your TMA System Administrator for further assistance.

Getting Around in TMA

The TMA home window is visible after a successful login. Each element of the home window is defined below.

TMA Home Window



Title Bar

The Title Bar identifies your facility name and the software version.

Main Menu

The Main Menu provides access to every menu and submenu within the TMA software. Click any enabled (darkened) word to display a menu of related functions. See Appendix A for descriptions of each function accessed from the Main Menu.

Keyboard shortcut equivalents are available for most menu items and functions and are defined in Appendix B. In general, you can press the Ctrl Key and the underlined character (Windows) or Option and the underlined character (Macintosh) for main menus or Ctrl+Shift+ the underlined character for submenu items (Ctrl+Options for Macintosh).

TMA Toolbar

The TMA toolbar is used to locate records as well as *Add*, *Edit*, *OK* (save) changes, and *Cancel* changes.

You can adjust the size of the toolbar in TMA. The small size eliminates the toolbar text and displays only the function buttons. To display the toolbar text, select *File > Preferences > User Preferences / User Interface Elements,* and click the *Show Toolbar Text* check box, or right-click on the TMA toolbar for the *Toolbar Options* context menu.

Buttons on the toolbar are grouped in sections that apply to adding/editing records, locating records, and task management.

Adding / Editing

Click *Add* on the TMA toolbar to start a new record or transaction from a record window. Type information in the blank fields on a window, and click *OK* to *Add* and *Save* a record.

Click *Edit* on the TMA toolbar to place the record in *Edit* mode and modify the existing record.

Delete on the TMA toolbar is sometimes used to remove a record from the database. Because of the intricate database connections, only records that are not connected to other records can be deleted.

Locating Records

Click *First, Previous, Find, Next,* and *Last* on the TMA toolbar to locate particular records from a record window.

Find locates a particular record. To use this feature, you must have a specific record identifier (for example, a work order number). See the topic titled Locating Records with the Toolbar Find Button.

Next and *Previous* display the next record in sequence either before or after the record currently displayed.

First and *Last* display the first or last record entered.

Task Management

Click *Help* on the TMA toolbar for access to information related to the open window.

Click *Print* on the TMA toolbar to print the displayed record and choose any available reporting options.

Click *Cancel* on the TMA toolbar to exit *Add* or *Edit* mode without saving the entries or changes made to the record.

- **Esc** is the keyboard equivalent of the *Cancel* button in MS Windows.
- **Command +.** (Period) is the keyboard equivalent of the *Cancel* button for the Macintosh.

Click *OK* to save the entries or the changes made to the record and leave *Add* or *Edit* mode. The Enter Key is the keyboard equivalent of the *OK* button.

TMA Wallpaper

Click *File > Preferences > User Preferences / User Interface Elements* and click the *Show Wallpaper* check box to display or hide wallpaper.

TMA Navigation Bar

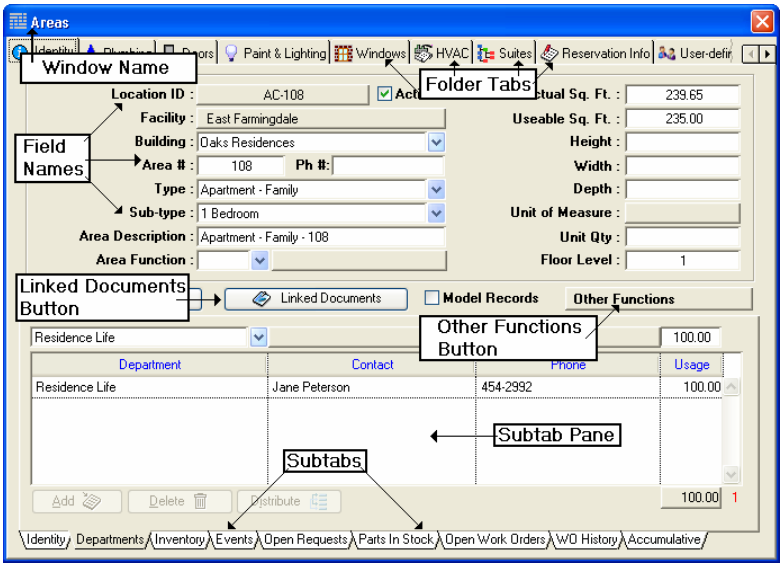
The Navigation Bar on the left side of the TMA home window provides quick access to TMA software functions. These icons correspond to frequently used selections on the main menu.

Click the menu names at the bottom of the TMA Navigation Bar to view function icons associated with that menu. Click an icon to launch the function window. Icons are available based on the user's privileges. If the user does not have access to a function, the icon for that function will not appear on the Navigation Bar.

The optional Teach Me! menu title bar contains icons for tutorials. Updated copies of the tutorials are also available from http://www.tmasystems.net. For a complete description, see the topic TMA Teach Me!

The Navigation Bar is convenient, but the Main Menu is the recommended route to review every aspect of the TMA software.

TMA Window Tour



Window name	The name of the selected function.
Folder Tabs	Tabs that open windows containing optional fields of information related to the window. Click a folder Tab for access to the window.
Field names	Assigned name for a field that occurs in every record in the selected window. Some field names can be changed by the TMA System Administrator.
Linked Documents button	Access point for a list of user-defined files that can be linked to the associated window.
Other Functions button	Access point for a list of submenus with information and functions related to the window.
Subtabs	Access points at the bottom of the window for information and history related to the window. Not all windows include Subtabs.
Subtab Pane	Display area for each Subtab.

Viewing Tab Windows

Most windows have multiple folder Tabs. Each Tab window contains fields for additional information and options that pertain to a record. To move from one to another, click the Tab.

Keyboard shortcut: Ctrl+Tab (Windows) or Command+Tab (Macintosh). This opens Subtab panes as well as upper Tab windows.

Moving From Field to Field

Press the Tab Key to move the cursor from one field to another. To move in reverse order, hold down the Shift Key and press the Tab Key.

TMA software uses the Enter Key to save the current record and change to *View* mode.

View, Edit, or Add Mode

The terms *View*, *Edit*, and *Add* mode are used when referring to a window status.

View mode. The window is available for viewing only – you cannot click in a field or tab from field to field to add or modify information. Right-click functions are available in *View* mode, but the *Cancel* and *OK* buttons on the TMA toolbar are unavailable.

Edit mode. When you click *Edit* on the TMA toolbar, only *Cancel* and *OK* are available. You can click in most of the fields to modify the record. Click *Cancel* to exit the record without saving any editing changes. Click *OK* to save the record with changes.

Add mode. When you click *Add* on the TMA toolbar, a new record window opens. Create a new record by adding information to the fields. Only *Cancel* and *OK* are available for selection. Click *Cancel* to exit the record without saving entries. Click *OK* to save the record as entered.

Time Saving Functions

The following functions are used to accelerate data entry when locating records or editing data:

- Find
- Browse
- Model Records

Locating Records with the Toolbar Find Button

When using *Find* on the TMA toolbar, the search focuses on a particular field within a record.

To locate a particular record:

1. Open the desired window such as *Work Order*.

2. Click *Find* on the TMA toolbar.
3. Click the search field such as *Work Order #*.
4. Type the specific information concerning the record being sought.
5. Click *OK* on the TMA toolbar.

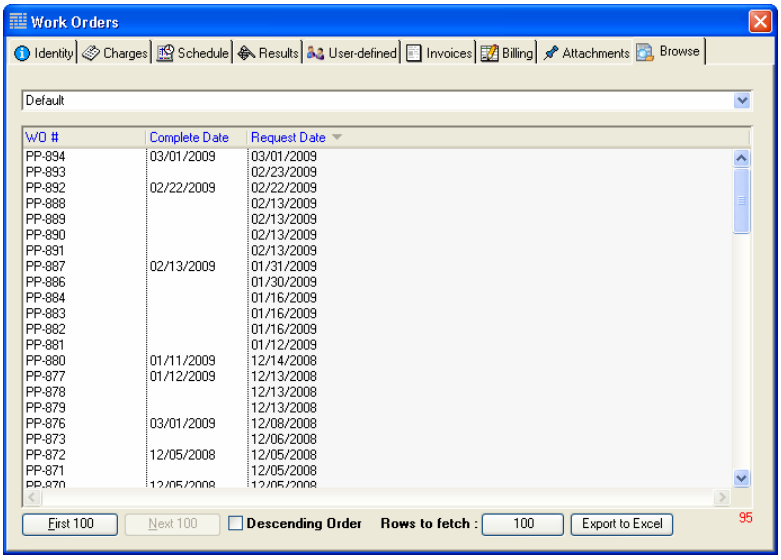
If a record matches the criteria, it is displayed.

When using *Find*, you can identify an indexed field because the mouse pointer changes to an 'I' beam.

Locating Records Using the Browse Tab

Browse is a means of displaying a list of the records in a Table. You can view records in groups of varying sizes.

Use caution before choosing more than a few hundred at a time. If you have many records, loading a large list can take time.



Double-click a line to view the full record on the *Identity* Tab and close the *Browse* window.

The number of records in the available list is indicated by the red number at the lower right corner of the window.

Sorting Lists

Both selection popup lists and *Browse* Tabs support columnar sorting. The column with an Up or Down arrow indicates the primary sort column and the direction of the sort. A Down arrow indicates a descending sort (A-Z), and an Up arrow means an ascending sort (Z-A).

When you first open the window, the first column displays an ascending sort by default. No Up or Down arrow is shown. Once you click a column, the arrow is displayed to identify it as the sort column.

Using Drag-and-Drop with Selection Lists

Use the drag-and-drop technique to populate fields from the lists in the selection windows:

1. Click to select a line in the list.
2. Click and hold the mouse button.
3. Drag your selection into the field or list.
4. Release the mouse button to populate the field/list with the selection.

Using Auto Find and Wildcards with Selection Lists

To use *Auto Find* in *Add* or *Edit* mode:

1. Enter the first few characters in a field.
2. Press the Tab Key.

The software automatically populates the field with the closest match to the characters typed.

For example, typing “Red” in the *Building* field and pressing the Tab Key could locate Redwood Office Park.

To use the asterisk (*) as a wildcard in an *Auto Find* on the first column of a selection list:

1. Press the asterisk key on the numeric key pad (do <u>not</u> use the number line above the alpha keys).
2. Type the first few characters of the record you want to find.
3. Press the Tab Key.

The software finds the first record with the closest match.

Press the Backspace Key to reset a search.

Adding Records Using the Model Records Feature

Model records save time when entering consecutive records that have identical or similar settings.

1. Locate the record that you wish to model.
2. Click the *Model records* check box on the *Identity* Tab.
3. Click *Add* on the TMA toolbar. Some of the data from the selected record are retained in a new record, instead of the usual empty record.
4. Edit fields as required. (Some fields do not allow duplicate data.)
5. Click *OK* on the TMA toolbar to save the record.

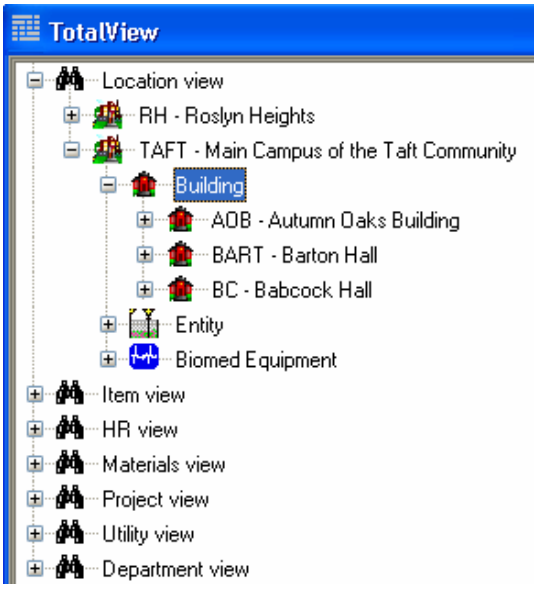
Asterisk Indicator

Linked Documents. An asterisk (*) automatically displays next to the *Linked Documents* button when files are linked to a record. The asterisk indicates that additional information is available.

Estimates. An asterisk indicates that an estimate has been completed and saved in the *Advanced Estimates* window (WorkGroup and Enterprise only).

TotalView

TotalView is a tree list accessed from the *File* menu or by pressing the F4 function key. It is somewhat like a table of contents or directory. It displays the data structure of the TMA software.



There are seven initial Views to open:

Location View	Click the plus sign to expand the tree from Facility, to Building or Entity to Area and items.
Item View	Click the plus sign to expand the tree from any type of item to specific items. You can only zoom to the Equipment Type categories linked to your repair center (if Equipment Types are linked to a specific repair center). This is true regardless of the repair center designated for the individual equipment items.
HR View	Click the plus sign to expand the tree from Shop, to Trade to individual Technician.
Materials View	Click the plus sign to expand the tree from Warehouse or Part Types to Parts records.
Project View	Click the plus sign to expand the tree from Project Type to Project, Project Tasks, Requisitions and Work Orders.
Utility View	Click the plus sign to expand the tree to the Facility or Utility. Right-click on an icon for context menu options. These vary depending on the item.
Department View	Click the plus sign to expand the tree to view the various Departments and related Items. Right-click an icon for context menu options. These vary depending on the Department.

Right-click an icon in *TotalView* for related options:

- Zoom (to record)
- History (of work)
- Send Email (to technician)
- Create a work order

Click the minus sign to close a cascade list from one of the views.

Access for TotalView is set from *Admin* > *Security* > *Users / Privileges Tab – File-TotalView* check box. Zoom access to connected records via TotalView is restricted by repair center access and regulated by normal User Privilege controls.

Note The Asset and Tools functions are only available in WorkGroup and Enterprise versions.

Common Features and Functions

Some features and functions are common to most windows in the TMA software.

Required Fields

Each record window contains one or more required field(s) that must be completed before the record can be saved. If you attempt to save before completing all required fields, the software is designed to highlight these fields in red.

Click the highlighted fields, and add the information. Once all the required fields are complete, you can save the record.

TIP If the TMA System Administrator selects the *Color required fields* option, required fields are color-highlighted when you click *Add* on the TMA Toolbar.

Using Selection Windows

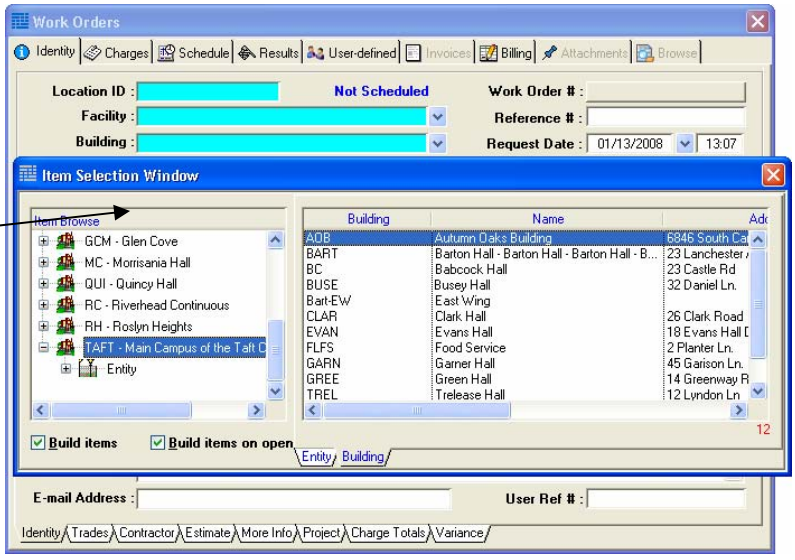
Selection windows are used to provide a list of available options for a field. Fields that contain selection windows are identified with a down arrow button at the right side of the field. Click the down arrow to open the selection window.

If the selection window contains more than one section:

1. Select a line in the left pane of the window to limit the choices in the right pane and refine the search.
2. Click the *Building* Subtab of the right pane to view buildings or the *Entity* Subtab to view associated entities.
3. Double-click the line item in the right pane to make the final selection and populate the field.

This selection populates the Building field with the Building Name Autumn Oaks Building *which is associated with the Taft - Main Campus Facility.*

Selection Window



Adding Records

1. Click the Main Menu or Navigation icon to open the window for the new record.
2. Click *Add* on the TMA toolbar. This places the cursor in the first field of the window.
3. Type or select the information. A down arrow indicates that a selection window is available to assist with choosing the correct entry if fields are linked to other files.
4. Press the Tab Key to move to the next field (or place your cursor in the field).
5. Type the information.
6. Press the Enter Key or click *OK* on the TMA toolbar to save the record.

Note Some fields are required and must be completed to save the record. **Not every field** must be completed when adding a new record. An option in *Organization* > *Repair Center* > *Records / Preferences* is available to color-highlight required fields when you click *Add*.

Editing Records

1. Open the desired function window.
2. Locate the specific record.
3. Click *Edit* on the TMA toolbar. The cursor is automatically positioned in the first editable field.
4. Modify the desired fields.
5. Use the Tab Key to move from field to field, or click in the field you want to edit.
6. Click *OK* on the TMA toolbar to save the revisions.

Deleting Records

1. Open the desired function window.
2. Locate the specific record.
3. Click *Delete* on the TMA toolbar. If the record is linked to other records, a message indicates that you cannot delete the record.

   If there are no links or history affected, a prompt asks you to confirm deletion.
4. Click *Yes* to delete the record.

Note On many windows in the TMA software you see an *Active* check box. On new records, this check box is marked by default. Since most records cannot be deleted because of links or history, they can be made inactive to remove them from lists and reports. In *Add* or *Edit* mode, click the box to clear it and make the record inactive.

Right-Click (Option Click for Macintosh)

Numerous shortcuts are embedded in TMA software; they are accessed by a right-click (Option+click for the Macintosh).

In addition to right-click context menus, many **fields** feature the right-click. For example:

- **Work Order** – *Location ID* or *Tag Number* field for zoom and reporting options.
- **Work Order** – Almost any field or check box related to batch print, browse, create confirmations, and individual billing options on any of the Tabs.
- **Work Order Browse** – Any line to assign technicians.
- **Building Record** – Facility field for zoom to the facility record or building history report.
- **Area Record** – Building field for zoom to the building record or area history report. On the Subtab pane, right-click an item in the list to create a work order or access the *Model Records* function.
- **Location ID Field** – Area, equipment, asset, vehicle, group, tool, and entity to create a work order from the record window.
- **Tag No. Field** – Equipment, asset, vehicle, tool, group to create a work order from the record window.

Other areas also use a right-click to access hidden options. If in doubt, give it a try.

Using Date Shortcuts

To include date information in TMA software:

- **Day/Month shortcut –** for dates in the current **year**, type the month and day, for example 0708 for July 8. Be sure to include the leading zeros for single digit days and months. If you use the European date format (day/month), use the day/month sequence. In the previous example, 0807.
- **Day shortcut** – for days in the current **month**, type the day (numerical), and tab out of the field. No leading zeros are needed with this option. When you tab out of the field, TMA completes the full date.
- **Calendar date look-up** – click the down arrow to open the calendar window. Double-click the day on the desired month/year to select the date from the calendar page.

Cut, Copy, and Paste

TMA software supports the Microsoft Windows standard cut, copy, and paste of text to and from fields in the application.

Linked Documents

Click the *Linked Documents* button to access and create links between the TMA window and other files such as spreadsheets, graphics, documents, etc. created with external applications. Files are launched from the *Linked Documents* window in the correct application with full editing and formatting functionality.

The application used to create the selected file must be installed on or available to the TMA workstation in order to launch a file using the *Linked Documents* button.

Creating a Document Link

1. Locate the record you want to link.
2. Click the *Linked Documents* button.
3. Click *Add* on the TMA toolbar when the *Linked Documents* window opens.
4. Type information in the three required fields:

   Name: Type a name to identify the link. The name entered here does not have to match the actual file name.

   Path: This is the path to the file. TMA software cannot launch the file unless the path and file name are valid. Click the *Path* button to open the *Select Import File* window and browse for the file; double-click the file name to load the path.

   Type: Select a *File Type*. These categories are specific to your business needs. If the desired *File Type* has not yet been established, it can be created 'on-the-fly' from the *Document Types List* window. At least one *Type* must exist for this window to display.

4. (Optional) Use the selection list to choose from a predefined set of *Applications*. This identifies the program associated with the file.
5. (Optional) Locate the correct program
6. (Optional) Double-click to select. The field is for information only, but specifying an application helps other users locate the appropriate file.
7. Click *OK* on the TMA toolbar to save the link. The linked document *Name* and *Type* is shown in the read-only section of the window.
8. Repeat steps 2-7 to create additional links to other files.

An asterisk is displayed next to the *Linked Documents* button on the *Identity* Tab if a record has *Linked Documents*.

Viewing an Existing Linked Document

1. Click the *Linked Documents* button.
2. Double-click the line item in the list of linked files to launch the non-TMA application and the file.

   You can modify the file **if you do not have another copy** of the non-TMA application open.

3. Save the modified file with a new name. After saving, this new file must be linked using the steps outlined in Creating a Document Link above.

If you purchased the TMA CAFM option, you can view the file with CAFM by clicking the *View Document with TMA CAFM* button. Once launched,

the file displays in a window over the linked record. Reposition the window as needed for optimal viewing.

Viewing tools and options are available for use with the file from within the CAFM Module as well. For AutoCAD drawings, menus and tools are visible on the window to perform many drawing functions such as Zoom Extents and Leader Notes.

Information about Editing and Deleting Document Links is found in the "Standard Functions" chapter of the *TMA User Guide*.

Caution Files launched in other applications (such as Microsoft Word or Excel) are **not released** until the current TMA function window, i.e., *Work Order, Vendors, Equipment, etc.*, is closed.

Other Functions Button

A list of submenus that offer additional information and reports related to the item record is visible when you click the *Other Functions* button on a record. Specific details about features on the submenu can be found in the "Standard Functions" chapter of the *TMA User Guide*.

Subtabs

Detailed information specific to the open record is displayed on the Subtab panes. Subtabs vary with the item being viewed. The Subtab panes for each window containing this feature are described in the *TMA User Guide*.

Report Options

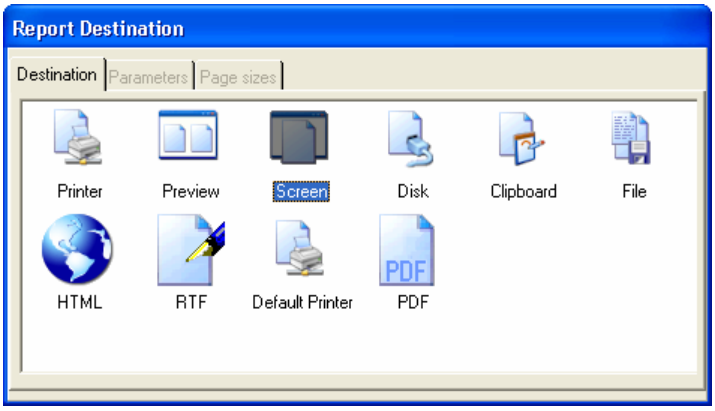
Click *Print* on the TMA toolbar to see options for various reports including record lists and detail sheets to view or print. These reports vary depending on the window.

Printing

The software offers to print a work order when you click *OK* to save the record if your repair center has the option *Prompt for print* selected.

You can click *Print* on the TMA toolbar if you do not receive a prompt to print.

The *Report Destination* window displays several options:



- Printer: The work order prints to your system default printer.
- Screen: A copy of the work order displays on your monitor with an icon on the title bar to send to the printer.

Double-click your destination preference. (Other print options are described in the *TMA User Guide*.)

Help Functions

The TMA software provides help on several levels from broad to specific.

Field Help Message

The field help message gives you indispensable online help and information about a specific field. This feature is cursor sensitive. Move the cursor over a field and watch for a "popup" help message related to that field. You can use the technique on fields, check boxes, or radio buttons. Descriptive information regarding their operation, requirements, or purpose is displayed.

On-Line Help

Select *Help* > *TMA Help* from the Main Menu for the TMA *User's Guide*. The entire manual is available online with full contents, index, and search capabilities available.

TMA Teach Me!

Brief audio-visual tutorials of some of the primary TMA software functions are available if installed from the TMA installation CD. Click *Teach Me!* on the TMA Navigation bar, then click one of the icons to start a .wmv tutorial of the related TMA software function.

Tutorial files are launched in the Windows Media Player and should be viewed in full screen to prevent distortion. Note that Windows Media Viewer is the only application that will play .wmv files.

Updated copies of the tutorials are also available from http://www.tmasystems.net. After you log in, click the *Download* link in the On-Line Tutorials paragraph. When you click a .wmv file name, it is

launched. You may need to set different options in Internet Explorer so you can choose Windows Media Player as the viewer and set it to full screen.

Exiting TMA

Exit the TMA software using *File > Quit* at the end of operations. **Failure to exit properly can cause serious problems**.

Closing the Program

Always close TMA software before you leave for the day, and be certain to the use the *File > Quit* command to do this. Daily backup of data is usually made after regular business hours, but the backup may fail if any users are logged in when the operation is performed.

If a user is logged in during records processing, data **can** be lost or corrupted. Data corruption is not immediately detected and may be compounded with additional data transactions.

If TMA Locks Up

Contact your TMA System Administrator immediately if the TMA software locks up, e.g., you cannot enter data or exit the current window during the processing of records. In the interim, try the following keyboard options *in the order listed* to attempt to remedy the problem:

1. Press the Esc (Escape) Key on your keyboard.
2. Press Ctrl + Break
3. Press Ctrl + Alt + Delete

Be prepared to tell the TMA System Administrator exactly what actions you were taking—in detail—when the system shut down or locked up.

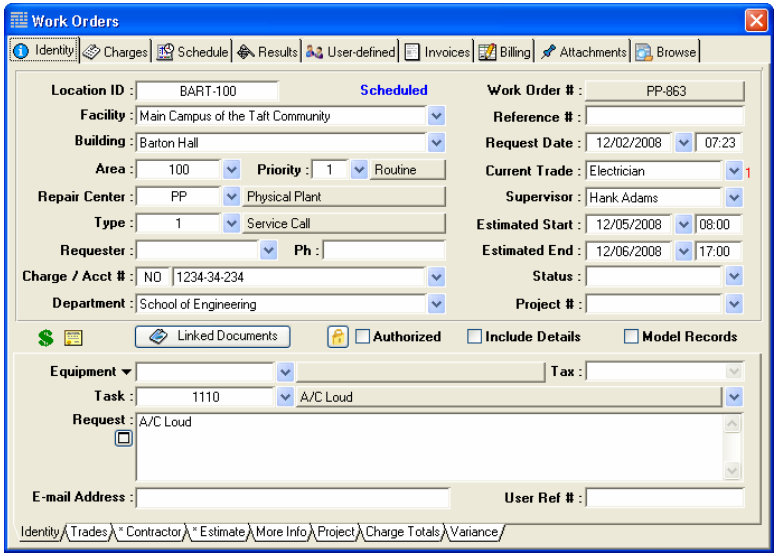
Chapter 3
Creating a Basic Work Order

Overview

Work orders form the heart of TMA transactions. When a request is received for a maintenance task or when planned maintenance is due, a work order is created using TMA software.

Using information included in the work order windows, you can track:

- Labor costs
- Material costs and other charges
- Payments received
- Billing information
- Safety and risk factors



Creating a Basic Work Order – Required Fields

Path: Transactions > Work Order > Records / Identity Tab

All that's needed to create a new a work order is data in the required fields. (This assumes that the System Administrator has set up the

Lookups records that are related to the required fields of the *Work Order* window.)

Required fields for the *Work Order* and the associated record are:

Field Name	Description	Related Records
Location ID	Combination of Building Code and Area number	Building and Area
Building	Location (hierarchy level 2)	Building (*Organization* > *Building*)
Area	Location (hierarchy level 3)	Area (*Organization* > *Area*)
Task	Defines what needs to be done	Task Library (*Organization* > *Task*)
Trade	Identifies the Trade that will perform the work	Trade (*Organization* > *Lookups*)

Work order numbers are assigned by TMA when all required fields are completed and the record is saved, that is, when you click *OK* on the TMA toolbar.

How to Create a Work Order

Path: Transactions > Work Order > Records / Identity Tab

1. Open the *Work Order* window. You can do this in several ways, such as, click the icon on the Navigation Bar, follow the menu path, or use the keyboard shortcuts Ctrl+M (Windows) or Command+M (Macintosh).
2. Click *Add* on the TMA toolbar. Required fields may show a color-highlighted background until they contain data. This option is selected for your repair center by the TMA System Administrator.
3. Type the *Location ID*, or if you don't know the ID, tab out and complete the *Building* and *Area* fields.
4. Type or select the *Building*. If the *Location ID* field was completed, this field is populated automatically.
5. Type or select the *Area* number.

   If you use a selection window, you can double-click to transfer information to the field. The *Location ID* field is also populated if previously left blank. If the *Location ID* field has been completed, the *Area* field is populated automatically.
6. The *Date/Time*, *Priority*, *Repair Center*, *Type*, and *Charge* fields are completed by default, but you can make changes. Select (highlight) the information in these fields to type your changes, or click the down arrow to choose different data.

   Date/Time defaults to the date of the system clock and initiates the elapsed time displayed on the *Results* Tab.

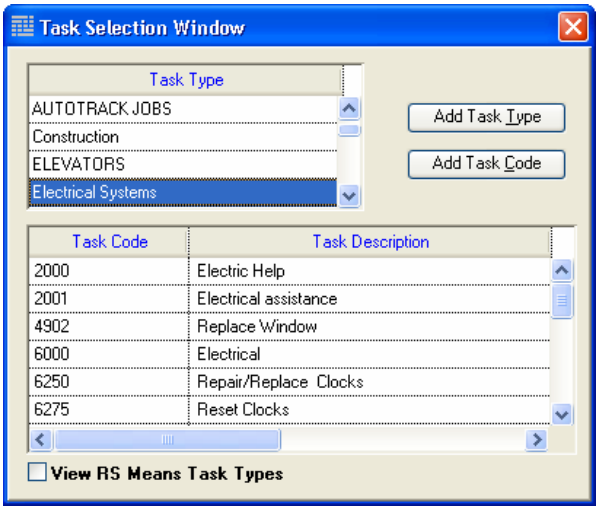
   Priority defines the urgency of the work order compared to other scheduled work.

   Repair Center is that of the user logged into TMA.

Type refers to the category of the work order, such as a PM work order or a safety-related work order, etc.

Charge indicates whether or not the work will be billed to another department. The default is NO or YES, depending on a selection in your *Repair Center / Preferences*.

7. Type or select a *Task Code*. If you choose from the *Task Selection Window,* use of the *Add Task Type* or *Code* buttons is restricted.



8. Type or select a *Trade*. Some task types are linked to a trade. If a trade is associated with the task, the *Trade* field is completed by default.

9. Double-click the desired *Trade* on the popup window.

   Use the *Trades* Subtab to add additional trades. When more than one trade is selected, the work order is called a multi-trade work order. (See the *TMA User Guide* for more information on multi-trade work orders.*)*

   Additional information about the requested work can be added in the *Request* field and is printed on the work order.

10. Click *OK* on the TMA toolbar to save.

If prompted to print the work order, follow your company's policy and click Yes or No.

Creating a Basic Work Order – Elective Fields

Path: Transactions > Work Order > Records / Identity Tab

It is best to complete as many of the optional fields as possible. Information in these fields is useful for follow-up work.

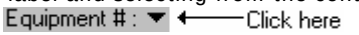
Requester - The name of the person who made the request.

Ph - The phone number of the requester.

Acct # - The account number to be charged (if the work order is chargeable).

Item # (Equipment#, Asset#, etc.) – The ID of a hard asset. Hard assets (e.g., equipment, vehicle, etc.) have an identification number. A blank *Item #* field indicates this is a work order for the identified space rather than for a specific item.

Change the dynamic label by clicking the down arrow adjacent to the label and selecting from the context menu:



Click the down arrow at the right side of the field for selections of item # and type. (See the topic Using the Item Selection Window for details.)

Reference # – The number that is converted from the request log. If a work order is converted from a request, this field contains the request number. If blank, this alphanumeric field can be used as an internal reference.

Estimated Start / Estimated End - The dates a work order is assigned to a technician and completion is expected.

Status - An explanation of the work order progress. If the work order is to remain open, click the down arrow and select a status.

Request – Additional information that is printed on the work order. The task code description appears by default, but you can type more details about the job. Information in this field is printed on the work order.

The following options are available for WorkGroup and Enterprise users only:

Contractor Subtab - The name of an independent contractor, if used. For additional information see Contract Management in the *TMA User Guide*.

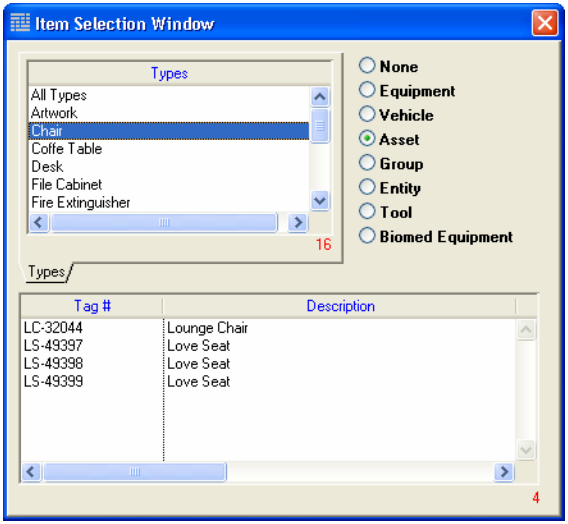
Project # – The number of the related project. Click the down arrow to select or create a project associated with the work order. This field is automatically populated if a project activity is converted to a work order from the *Project* window.

Using the Item Selection Window

After you click the down arrow in the *Item #* field:

1. Click the appropriate radio button on the *Item Selection Window* to view a list of corresponding types.

2. Select either a specific type or *All* types to see related *Item #* and *Description*.
3. Double-click the line item of your choice in the lower pane. (If the *Work Order Building/Area* fields are complete, the *Item Selection Window* list only includes items linked to the *Area* identified on the *Work Order*.)



Note: Entities are not associated with a specific building or area. If the *Entity* radio button is selected for the search, the software displays all entity items connected to the same facility linked to the building and area on the work order.

Report Options from the Report Manager

Path: Reports > Report Manager

This is not a complete list of work order reports available from the *Report Manager* window, but these are the more frequently used reports.

Management Reports

Path: Reports > Report Manager / Management

Work Order Analysis by Type – A summary of all work orders by type, showing total quantity issued vs. total quantity and total hours completed. Information available: work order type, # issued, # completed, and total hours. Search based on request date.

Work Order Completion Summary – A summary of all complete work orders. Information available: work order type, priority of work, # of *Work Orders*, labor cost, material cost, and total cost. Options: By selected repair center or all repair centers. Date range selection available based on the *Complete Date* field.

Work Order Received – A list of work orders received during a specified time frame.

Work Order Statistics Detail – A detailed list of work orders sorted by building and subtotaled by facility and repair center. This report includes work type detail.

Work Order Status by Facility – A summary list of all work orders, open and closed, subtotaled by repair center, including a breakdown by facility. Options: By selected repair center or all repair centers. Date range selection based on open and completion date.

Work Order Status by Repair Center – A summary list of all work orders, open and complete, subtotaled by repair center. Work orders qualify if the *Request Date* or *Complete Date* falls within the date range specified.

Status Reports

Path: Reports > Report Manager / Status

Work Order Aging List Sorted By Date – A list of all open work orders grouped by type and sorted by date.

Work Order Aging List Sorted By Facility – A list of open work orders requested within a specified date range, sorted by facility. Information includes work order #, requested date, task code, task description, status, location id, building, estimated time, and estimated cost. Report options: By selected *Repair* center or all repair centers. For all locations in the selected facility or selected building.

Work Order Aging List Sorted By Technician – A list of all open work orders for a specified date range, for one or all technicians.

Work Order Aging List Sorted By Trade – A list of all open work orders sorted by date and grouped by trade. The report can be limited to one trade and repair center.

Chapter 4
Scheduling and Assigning Work Orders

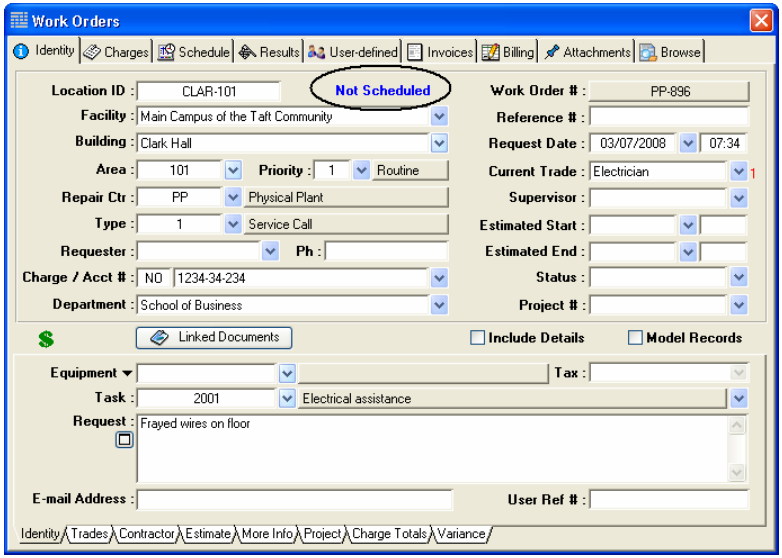
Overview

Assigning the open work order to a technician or group of technicians is the next step in creating a work order.

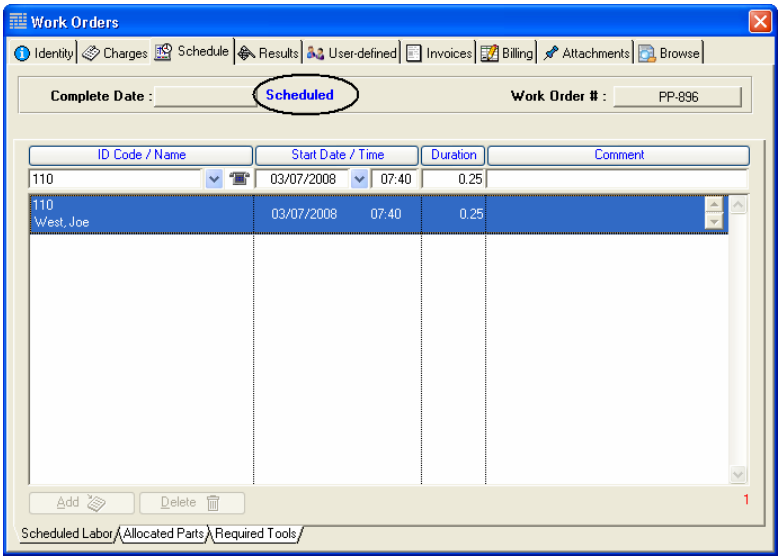
One of the benefits of TMA software is the ability to review unassigned work orders either on a broad or a specific basis. You can request a list of all unassigned work orders or refine your search to specific criteria based on repair center, shop, trade, shift, and/or work order type.

Scheduled Work Orders

Work orders are identified for scheduling and reporting purposes as *Not Scheduled* or *Scheduled*. The assignment status is noted on each Tab of the *Work Order* window.



Whether you assign a technician from the *Schedule* Tab or from the TMA *Scheduler* window, the work order reflects the term *Scheduled*.



Using TMA Scheduler

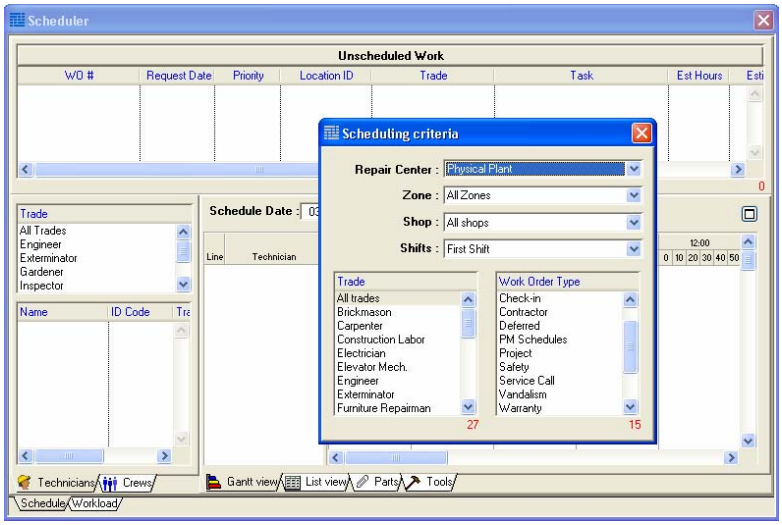
Use the *Scheduler* window to assign multiple work orders and/or multiple technicians at one time. Two steps are involved in this process:

1. Determine the criteria for the work orders you want to review for assignment.
2. Assign technician(s) to the work order(s) for the date the work is to be done.

Searching for Unassigned Work Orders

Path: Transactions > Time Manager > Scheduler

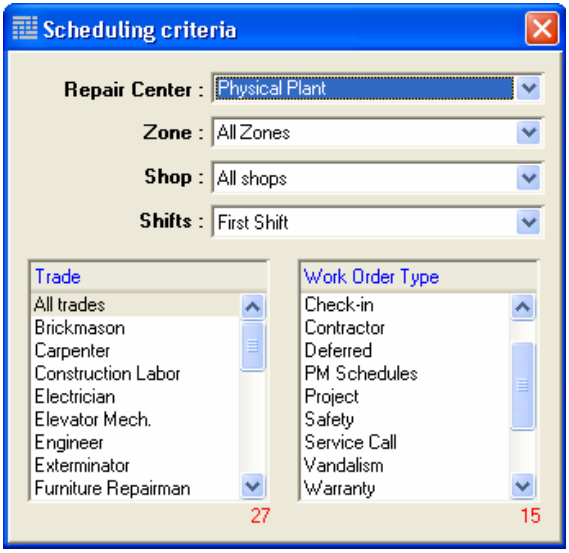
The following steps take you through the process of finding work orders that need to be assigned to a technician based on the selection criteria you determine.



1. Open the *Scheduler* window using the keyboard shortcut Ctrl+Shift+Q (Windows)—Command+Shift+Q (Macintosh)—or the menu path.

   The *Scheduling Criteria* dialog box is active when you open the *Scheduler* window. The *Scheduler* window itself is inactive in the background.

2. Make your criteria selections on the *Scheduling Criteria* dialog box (detailed in steps 3–7).



3. Select a *Zone* if you want to search zones. The default is *All Zones*. The use of zones is optional in TMA software.
4. Select a *Shop*. The default is *All Shops.* The use of shops is optional in TMA software.
5. Select a *Shift* if you wish to search by shifts.
6. Click the *Trades* you want to search or *All Trades*.

7. Click the *Work Order Types* or select *All Types*.
8. Click *OK* on the TMA toolbar to close the *Scheduling criteria* window and start the search.

Once the work order list is generated, you can assign technicians to perform the work.

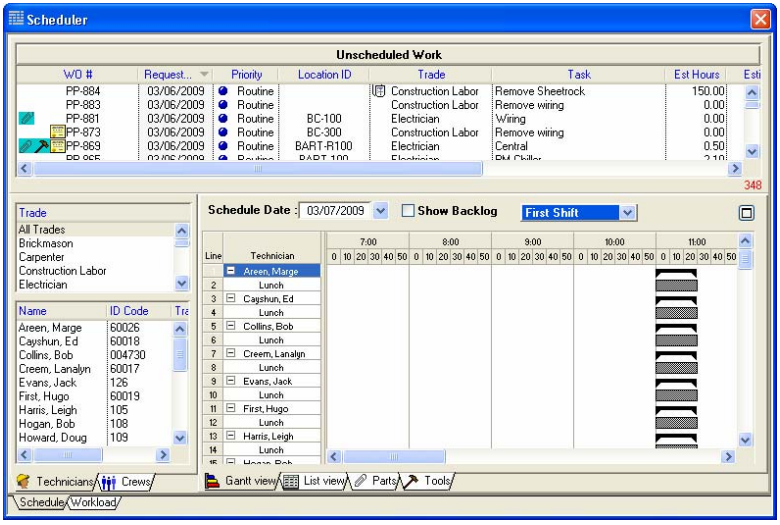
Assigning a Work Order from Scheduler

Path: Transactions > Time Manager > Scheduler

The *Scheduler* window is enabled after you:

- Make selections in the *Scheduling Criteria* window
- Click *OK* on the TMA toolbar

To review a read-only copy of a specific work order, double-click the work order line in the *Unscheduled Work* section of the *Scheduler* window.



One or more technicians or crews can be assigned to one or more work orders in a simple drag-and-drop action.

1. Select a *Technician* or *Crew* line.
2. Click-and-drag to the desired *Work Order* line.

When you release the mouse button, the assigned technician(s), the work order number, and a colored bar display in the *Gantt View*. If a work order has been scheduled for the technician in advance, the work will also be displayed in the *Gantt Chart* pane.

Note **Lunch Periods.** The lunch period will display only when lunch is scheduled and occurs **entirely** within the shift. Therefore, the lunch period **will not display if it**:

- starts before the beginning of the shift
- ends after the shift is finished
- has the same start and end times (i.e., no lunch)

Estimated hours for a work order are pulled from an estimate if one was created for the work order. Hours can also derive from the *PM Scheduler* window if the *Est. Time* field is completed for the task.

Click the *Cancel* button on the TMA toolbar to exit the *Scheduler* window.

When you close the window, a message offers the option to batch print the scheduled work orders. Select *Yes or No* depending on your organization's procedures.

Viewing Workload from the Scheduler

Path: Transactions > Time Manager > Scheduler

To review a technician's work schedule on a daily, weekly, or monthly basis from the *Scheduler* window, follow these steps:

1. Select the *Technician* whose workload you want to review.
2. Click the *Workload* Subtab below the technician names.
3. Click the *Daily, Weekly,* or *Monthly* Subtab under the right pane.
4. On the *Calendar,* click the workload date you want to view to display color bars that represent assigned work orders and the start/end time.
5. Double-click the bar to view details of the work order.

Assigning a Work Order from the Work Order Window

Technicians can also be assigned from the *Schedule* Tab of the *Work Order* window using the following instructions.

Making Assignments from the Work Order Schedule Tab

Path: Transactions > Work Order > Records / Schedule Tab

1. Open the *Work Order* window.
2. Locate the work order you wish to assign.
3. Click *Edit* on the TMA Toolbar.
4. Click the *Schedule* Tab.
5. Type or select the *ID Code / Name*.

   It is **not a requirement** that the selected technician belong to the trade assigned with the work order.
6. Type the *Start Date / Time*.
7. Click *OK* on the TMA Toolbar.

Making Assignments Using a Keyboard Shortcut

Path: Transactions > Work Order > Records / Identity tab

1. Open the *Work Order* window.
2. Locate the work order you wish to assign.
3. Click *Edit* on the TMA Toolbar.

4. Use the keyboard shortcut, Ctrl+Shift+S (Windows) or Command+Shift+S (Macintosh), to open the *Technician Selection* window.
5. Double-click to select the technician you want to assign. The selected technician is added to the *ID Code/Name* fields of the *Schedule* Tab with the current date in the *Start Date/Time* fields.
6. Click *OK* on the TMA toolbar to save the record.

Chapter 5
Printing Work Orders

General Print Information

Work orders can be printed using three different methods:

- Individually (from *Work Order* or *Work Order Browse* windows)
- Batch (from *Work Order Browse* or *Batch Print* windows)
- Batch Print Override (from *Batch Print* window)

Printing Individual Work Orders

The individual print option allows you to find and print a single work order.

Printing from the Work Order Window

Path: Transactions > Work Order > Records

Follow these step-by-step instructions to print one *Work Order*.

1. Open the *Work Order* window.
2. Locate the work order you wish to print.
3. Click *Print* on the TMA toolbar.
4. Click the destination icon of your choice on the *Report Destination* window.
5. Click the *OK* button on the window.

TIP Keyboard Shortcut: Ctrl+Shift+R (Windows) or Command+Shift+R (Macintosh) from the *Work Order* window opens the *Print Setup* window to allow you to select a specific printer or print source.

Printing from Work Order Browse

Path: Transactions > Work Order > Browse

Single or multiple work orders may be printed from the *Work Order Browse* window.

1. Highlight the *Work Orders* to be printed.

2. Click the *Batch Print* button at the lower right of the screen.

To print selected lines in the list:

1. Highlight the first line.
2. Press and hold the Control key.
3. Click each line item desired.
4. Click the *Batch Print* button at the lower right of the screen.

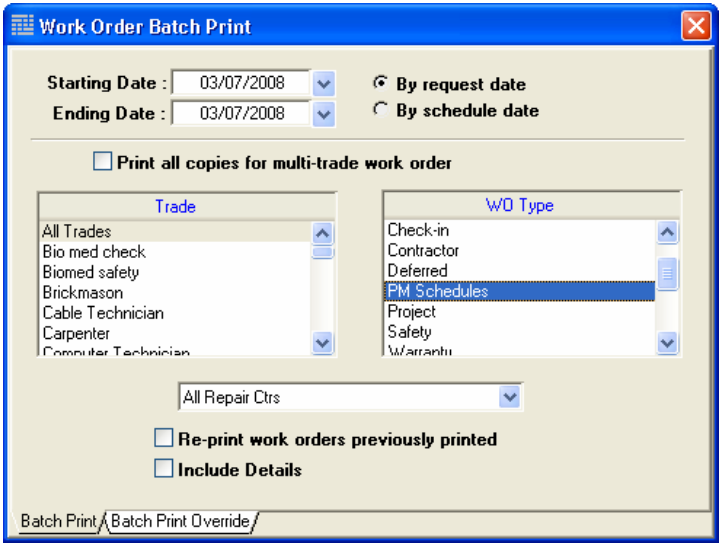
To print the entire list:

1. Highlight the first line.
2. Press and hold the Shift key.
3. Click the last line in the list. This action highlights all lines between the first and last.
4. Click the *Batch Print* button at the lower right of the screen.

Batch Printing

The default *Batch Print* option will print any open work orders that have not been printed in the past.

Batch Printing Work Orders



Path: Transactions > Work Order > Batch Print

The batch print option will print any open work orders. If you select the *Re-print work orders previously printed* check box, work orders that have been printed in the past and meet the selection criteria can be reprinted.

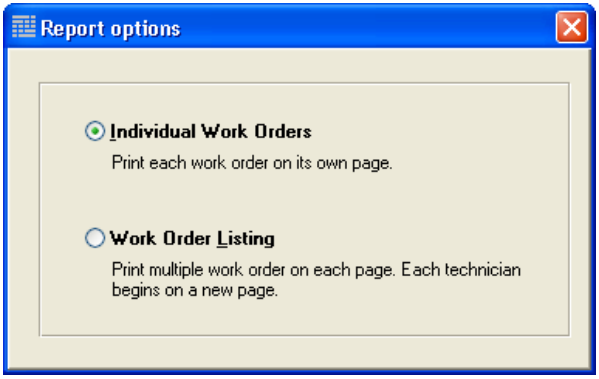
The selection choices are *By request date* or *By schedule date* for *Trade*, *Work Order Type*, and *Repair Center*.

Schedule date is the date the work order was assigned. The *Request Date* field on the *Work Order / Identity* Tab reflects the date the request or work order was initiated.

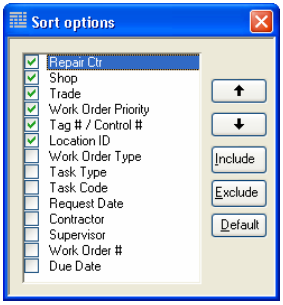
Step-by-Step Batch Printing

Path: Transactions > Work Order > Batch Print

1. Follow the menu path.
2. Click the *Individual Work Orders* or *Work Order Listing* radio button on the *Report options* window.



3. Click *OK* on the TMA toolbar.
4. Select the desired output (*Printer, Screen,* etc.).
5. Click *OK* on the TMA toolbar.
6. Select the *Starting Date* and *Ending Date* of *Work Orders* to print.
7. Click the radio button of your choice *By request date* or *By schedule date*.
8. (Optional) Mark the *Print all copies for multi-trade work order* to print multiple copies for the work that qualifies.
9. Select the *Trade* or *All Trades*.
10. Select the *WO Type* or *All Types*.
11. Select the *Repair Center* or *All Repair Ctrs* if available.
12. Click *OK* on the TMA toolbar to open the *Sort Options* window.



13 Choose the appropriate sort order.

14. Click *OK* the TMA toolbar.

To print previously printed work orders, see the next topic, Reprinting Work Orders.

Reprinting Work Orders

You can reprint work orders for different criteria.

Reprinting Previously Printed Work Orders

Path: Transactions > Work Order > Batch Print

The *Re-print items previously printed* check box prints all open work orders that meet the criteria you specify including those printed in the past.

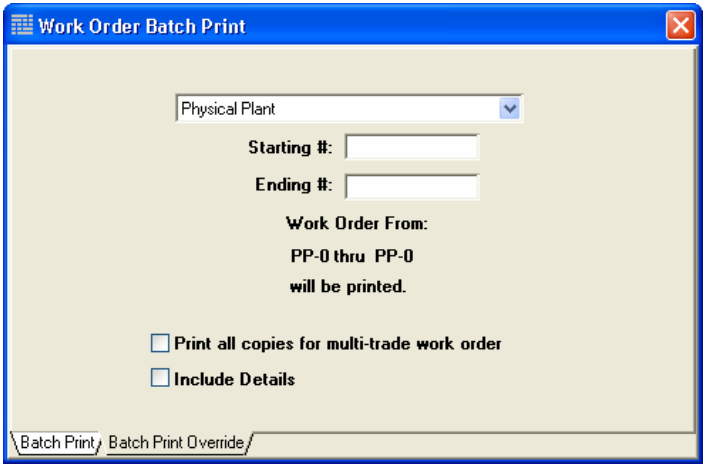
This feature offers more selection criteria compared to the options on the *Batch Print Override* Subtab, which is limited to a range of work order numbers.

1. Follow instructions in the *Step-by-Step Batch Printing* topic on the previous page.
2. Click the *Re-print items previously printed* check box.
3. Continue with the *Step-by-Step Batch Printing* process.

Using Batch Print Override

Path: Transactions > Work Order > Batch Print

The *Batch Print Override* options print all work orders within a specified work order number range including those printed in the past. This option is less targeted than using the *Re-print* check box.



1. Click the *Batch Print Override* Subtab.
2. Select the *Repair Center*. This is **required**. TMA eXpress users are limited to a single repair center. Therefore, they have only one option.
3. Type the *Starting #* and *Ending #* in a series. To print a single work order, use the same work order number in both fields.

4. (Optional) Click the *Print all copies for multi-trade work* check box. This option will print a copy of the work order for each trade scheduled on a multi-trade work order.
5. (Optional) Click the *Include Details* check box.
6. Click *OK* on the TMA toolbar.
7. Select the sort order or accept the default.
8. Click *OK* on the TMA toolbar to print the work orders.

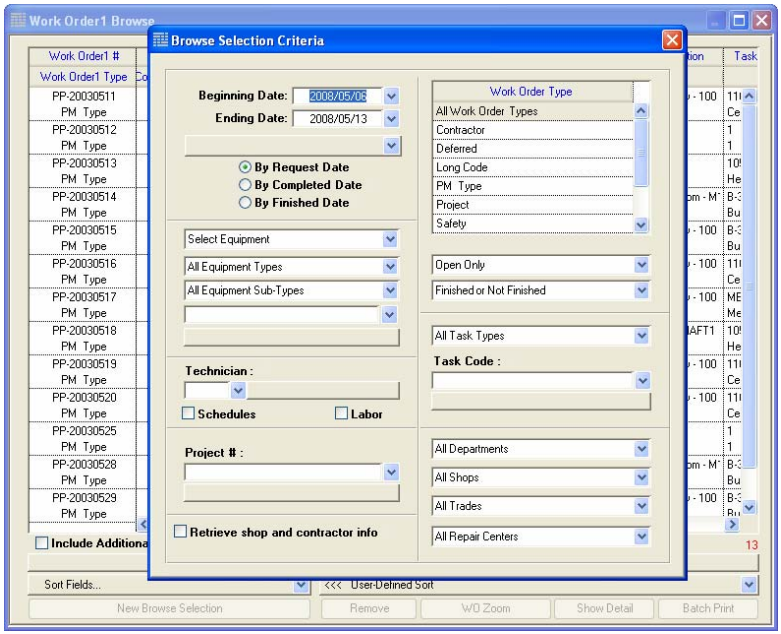
Chapter 6
Work Order Browse – Reviewing Work Orders

Work Order Browse

Sometimes you need to review both open and closed work orders created with TMA software. From the *Work Order Browse* window you can set the criteria you want to review and sort the work orders based on a number of available options.

You can also:

- View work order details
- Zoom directly to the work order
- Print the entire Browse list



Using Work Order Browse

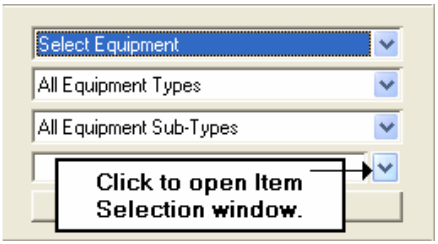
Path: Transactions > Work Order > Browse

The *Work Order Browse* filters can yield very broad or very narrow results, depending on how many of the optional selections you choose. For example, you can browse for all work orders written for a facility during a long time period, or you can search for work orders scheduled for a particular technician of a specific type. The broader your search, the longer it can take to generate the browse list.

1. Open the *Browse Selection Criteria* dialog box (*Transactions* > *Work Order* > *Browse*).
2. Select the *Beginning Date* and *Ending Date* fields for the date range. You can also click the *Today* button, and select a range such as *Today*, *Yesterday*, *This month*, etc.
3. Select a *Work Order Type*.
4. Click the desired radio button to see *Work Orders By Request Date, By Complete Date,* or *By Finish Date*.
5. Click the down arrow in the default *Select Facility* field to select from *Building*, *Area*, *Zone*, or item (equipment, tools, etc.) to narrow the search.

   Depending on your selection, subsequent fields are available to further refine the search.

   Example: If you seek work orders for a specific item number such as equipment, type the number in the next field or click the down arrow to make a selection.

   The filtering feature of the selection window allows you to focus on the area or item of interest and reduce the time required to generate the list.
6. Select your choice in the *Open Only* and *Finished or Not Finished* fields.
7. (Optional) Type or select a *Technician* or *Crew* ID. The *Schedules* and *Labor* check boxes relate to the *Technician*. Hold the mouse pointer over the two check boxes for definitions.

   The *Retrieve shop and contractor info* check box adds more detail to the *Browse*; however, it can slow the progress of generating the *Browse* list.
8. (Optional) Select your choice of *Task, Department, Shop, Trade,* and *Repair Center*.

   The default *Repair Center* is limited to the user who is logged in. If you have TMA Dispatcher access, click the down arrow to select your choice.
9. Click *OK* on the TMA toolbar to start the search.

A work order marked *Finish* indicates the work was done, but some requirements need attention before closing the request. A *Complete* work order is closed with no outstanding requirements.

Sorting the Work Order Browse List

Two buttons are located at the bottom of the window and are labeled *Sort Fields…* and *User-Defined Sort*.

Click the *Sort Fields…* button to select one or more choices from the list of column headings. As soon as you make a selection from the list, the *Browse* window line items are sorted.

Click the button to the right of the *Sort Fields…* button (the default name for the button is <<< *User-Defined Sort*) to sort by one of the following predefined groupings:

- Repair Center, Facility, Department, Building
- Department, Work Order #
- Supervisor, Trade, Priority, Date
- Trade, Priority, Date

To enable to the *Sort Fields…* button once more, click the *User-Defined Sort* button (the name of a predefined group may be displayed but it's also the *User-Defined Sort* button), and select the first option <<< *User-Defined Sort* on the list.

Removing Entries from the Browse List

To remove selected work orders from the browse list, highlight the work order line item on the list, and click the *Remove* button.

Using the *Remove* button does not delete the work order record from the database; it merely eliminates it from the browse list.

Work Order Browse Context Menu Options

When you select a line or multiple line items in the *Work Order Browse* window, you have the following options on a right-click context menu:

- E-mail Work Order to Technician
- Schedule Selected Work Order
- Update Selected Work Order as Completed (closed)
- Change Status On Selected Work Order

E-mail to the Technician

If e-mail settings have been established for your repair center, you can e-mail the assignment to technicians from the *Work Order Browse* list.

The e-mail function must be part of the setup for the repair center. Also, e-mail addresses for technicians must be included in the *Technicians* window (*Organization* > *Repair Center* > *Technicians*).

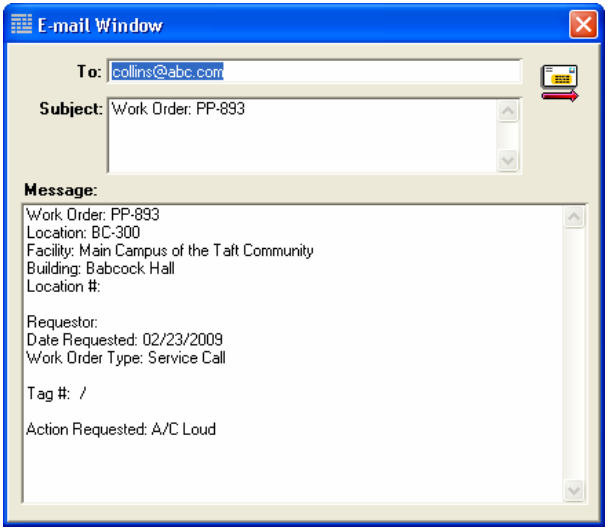
To use e-mail:

1. Highlight a line in the list.
2. Right-click the selected line for a context menu.

   Note: If the work order has not been assigned, the system includes the line *No Technician Scheduled*.
3. Select *E-mail Work Order To:[technician name].*

   If the work order is assigned to more than one technician, you can also select *E-mail Work Order To:All technicians*.
4. Click your selection to send the message.

When you click your selection, an e-mail window opens with the address of the technicians.



The work order number is shown in the Subject field, and work order information is in the message body field. The *From* address is established in *Organization* > *Repair Center / E-mail Configuration* Tab.

Schedule Selected Work Order

1. Highlight a line item in the list.
2. Right-click the selected line.
3. Select *Schedule Selected Work Order.*
4. Select a *Technician* or *Crew* from the *Select Technician* window.
5. Double-click to schedule the selected *Technician* or *Crew.*

When the *Select Technician* window closes, the assignment is made.

Complete Selected Work Order

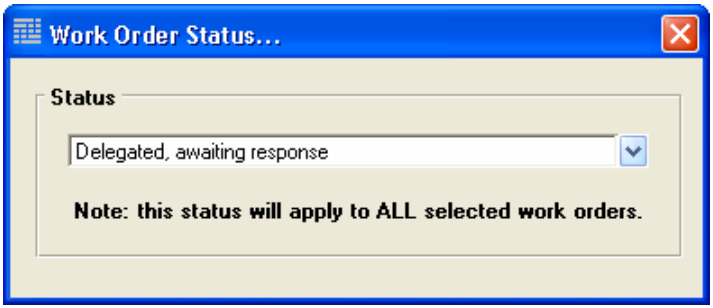
1. Highlight a line item in the list.

2. Right-click the selected line.
3. Select *Update Selected Work Order As Complete*.
4. Click *Yes* on the message box if you want to close the work order.

The work order is closed and the *Work Order Browse* window reflects the current date as the *Complete Date*.

Change Status on Selected Work Order

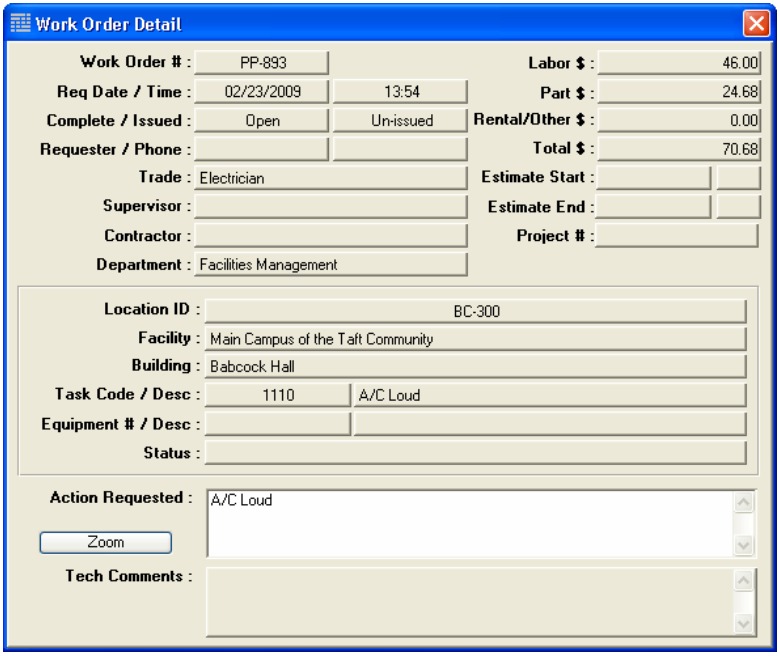
1. Highlight a line item in the list.
2. Right-click the selected line.
3. Select *Change Status On Selected Work Order.*



4. Select the status on the *Work Order Status...* window.
5. Click *OK* on the TMA toolbar.
6. Scroll to the right. The status is displayed in the column labeled *Hours / Status*.

When you change the status from work order browse, the work order record is also updated. If you zoom to the *Work Order* window from the *Browse* window, you will see the new status displayed in the *Status* field.

Viewing Details of the Work Order



To see the details of a particular work order without exiting the *Browse* window, click the *Show Detail* button. Items such as *Action Requested*, *Task Code*, and *Location* are available on the *Work Order Detail* window.

The *Zoom* button is available on both the browse list and the *Work Order Detail* window. Zooming to the work order closes the *Browse* list window and opens the *Work Order* window.

On the browse list, select a line item and click the *WO Zoom* button or double-click a line item in the list to open the *Work Order* window.

TIP Click the *Zoom* button on the *Work Order Detail* window to view the actual record.

Making a New Browse Selection

The software retains the last browse selection until you log off from TMA or generate a new list. For example, if you make a browse selection and close the *Browse* window to work on a different module or if you choose *Zoom* to view a work order, the same browse selection opens when you return to the *Work Order Browse* window.

To make a new browse selection:

1. Click the *New Browse Selection* button.
2. Change the desired fields on the *Browse Selection Criteria* window.
3. Click *OK* on the TMA toolbar to start the new search.

Printing Work Orders from Work Order Browse

You can print specific lines or all lines from the browse list.

Selected lines in the list. Highlight the first line, press and hold the Control key, and click each line item desired. Click the *Batch Print* button.

Entire list. Highlight the first line, press and hold the Shift key, and click the last line in the list. This action highlights all lines between the first and last line selected. Click the *Batch Print* button.

Printing a Work Order Browse Report

Two reports on the items displayed in the *Work Order Browse* window can be printed directly from the window. Check boxes located below the list provide the choices. The buttons are:

- Include Additional Info
- Include Action Requested on Report

Generate the browse list and check one or both of the report choices.

To print the report:

1. Click *Print* on the TMA toolbar.
2. Choose the desired print option (screen, printer, etc.).
3. Click *OK* on the TMA toolbar.

Work Order Browse Report

TMA Systems, LLC.

WO # / Trade	Requested	Complete / Finish	Task Code / Priority	Description / Status	Location / Building	Tag #
AX-2000221 Electrician	12/12/2008		4555 Routine	Replace Door	BC-300 Babcock Hall	
Request: This is a corrective work order resulting from failure DOOR - Broken Door.						
AX-2000222 Engineer	12/13/2008		ELE Routine	Elevator	AC-100 Aerobic Center	
Request: Elevator						

Example of Include Action Requested Report

The *Show Action Requested* option includes the instructions typed in the *Action Requested* field on the *Work Order* > *Identity* Tab but **does not show** the *Job Code/Description*.

Work Order Browse Report

TMA Systems, LLC.

WO # / Trade	Requested	Complete / Finish	Task Code / Priority	Description / Status	Location / Building	Tag #
AX-2000221 Electrician	12/12/2008		4555 Routine	Replace Door	BC-300 Babcock Hall	
AX-2000222 Engineer	12/13/2008		ELE Routine	Elevator	AC-100 Aerobic Center	

Example of Include Additional Info

Include Additional Info prints the task code and corresponding description, but **does not include** the action requested.

If you select both check boxes, you can see both the request and the task code.

Chapter 7
Recording Work Order Time

Overview

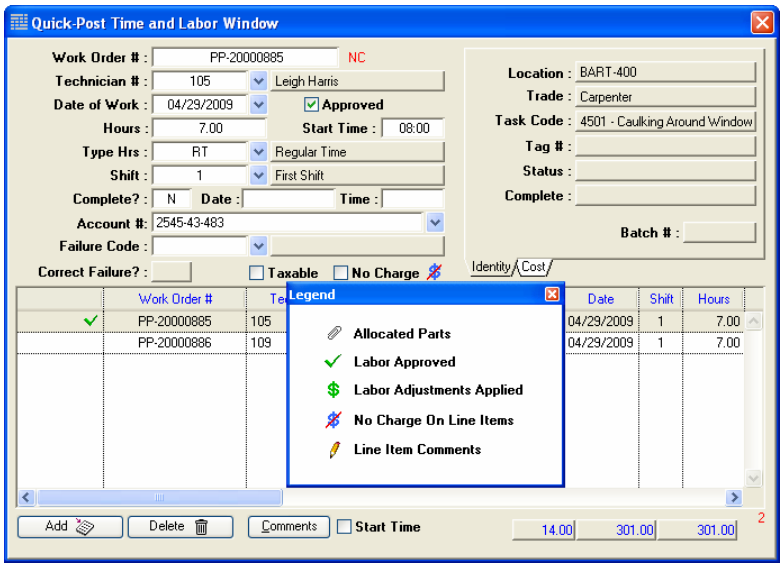
There are several ways to record the amount of time worked in connection with a work order. This *Basics Guide* covers the use of two:

- Quick-Post Time & Labor
- Work Order / Charges Tab

Recording Work Order Time – Quick-Post Time & Labor

Path: Transactions > Quick-Post > Time and Labor

Use the *Quick-Post* modules to record work order time in a batch format. This saves data entry time because data is entered without opening and closing individual work orders.



Use the *Quick Post Time & Labor* module to enter work order information such as:

- Who performed the task
- When the work was done

- Amount of time required
- Labor account number
- Complete date
- Corrective action

The fields that must be completed depend on the type of work order, but a minimum number are always required. These are listed in the following topic, Using Quick-Post Time & Labor.

Technicians' indirect time such as meetings, sick time, etc. can also be entered from this window.

Caution The posting list generated on these windows **is not saved** until you click *OK* on the TMA toolbar. Be certain to save your work every 8-10 lines.

Using Quick-Post Time & Labor

Path: Transactions > Quick-Post > Time & Labor

1. Follow the menu path to open the window.
2. Type the *Work Order #*. If no work order number is entered in this field, only indirect time can be posted.

   To view and select from a list of open work orders, type /R and tab out of the field. (Other shortcut keys include: /E for a list of equipment work orders, /A for assets, /V for vehicles, /G for groups, and /T for tools.)
3. Type or select the *Technician #*. This is the ID of the technician who performed the work.
4. Tab out of the *Technician #* field. The *Date of Work* field defaults to one day prior to the current date. Select a different date if needed.
5. Type the number of *Hours* and *Start Time*. The default format for the *Start Time* field is military (24 hour) time.

   The *Start time* check box next to the *Comment* button indicates whether the *Start Time* field is available. To enable the option, click the check box. If the *Start Time* check box is blank, the cursor skips the *Start Time* field. The *Approved* check box is used by those who have rights to approve time cards.
6. Type or select the *Type Hrs* (Regular Time, Overtime, Travel). The default for this field is the time type of the selected work order.
7. Accept the default *Shift* (defaults from the technician's personnel record), or type a different *Shift* code.
8. Type the desired *Complete?* field option to close the work order. Options are:
   N - do not close the work order (the default)
   Y - close the work order
   C - close only the current trade (for multi-trade *WO*)

   The software displays the current work order trade in the *Quick-Post* window. When *C* is selected, only the specific trade is closed. When a work order number is typed in the field later,

the next trade (that follows the closed trade) is displayed on the *Quick-Post* window.

9. Tab through the *Date / Time Closed* fields to show the current date and time if *Y* or *C* is typed in step 8, or type the desired close date and time.
10. Tab out of the *Time Closed* field to clear the screen and create another active data line, unless the work order is chargeable.

    If chargeable, press the Tab Key to move the cursor into the *Account* field (See *QP Time & Labor - Optional Fields*). An account number must be entered before the transaction can be saved.
11. Click *OK* on the TMA toolbar to save your work. **Until you actively save the input, it is not recorded**. This should be done every 8-10 lines.
12. Click *Cancel* on the TMA toolbar when all entries are saved.

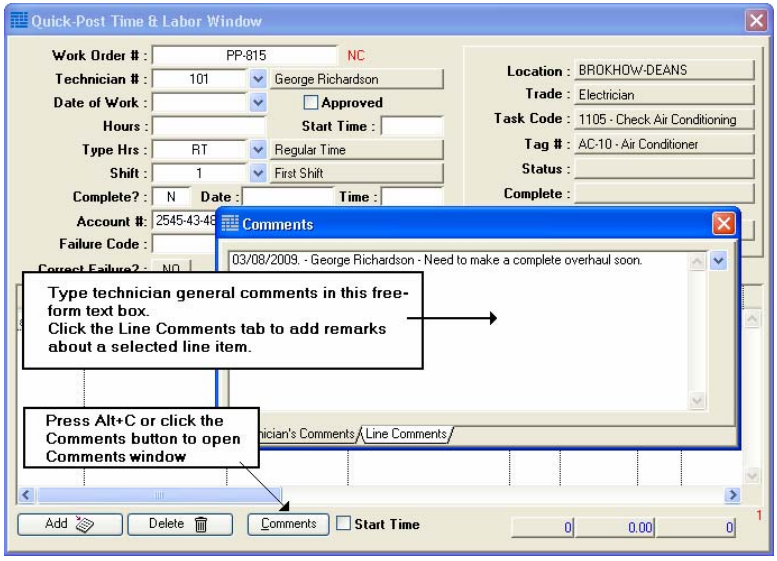
Quick-Post Time & Labor – Optional Fields

Path: Transactions > Quick-Post > Time & Labor

Account # - If the work order is chargeable, type or select the TMA account # responsible for providing the work. This **is not** the number from the *Work Order / Identity Acct #* field.

Failure Code - is used for failure analysis reports. Click the down arrow to select a code from the selection list.

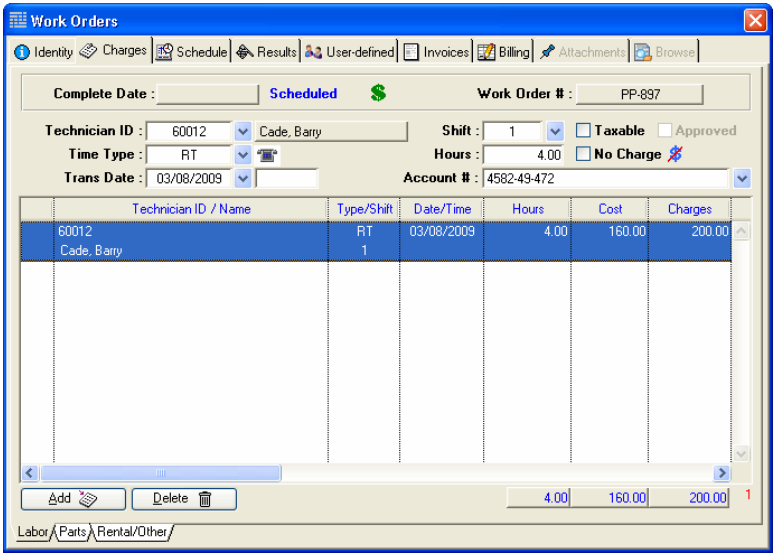
Quick-Post Time & Labor - Technician Report



If you want to add the technician's report to the work order, press Alt+C or click the *Comments* button to open the free-form text window.

Caution To save data, you must click *OK* on the TMA toolbar from the *Quick-Post Time & Labor* window.

Recording Time – Work Order / Charges Tab



Path: Transactions > Work Order > Records / Charges Tab

The Quick Post function is the most efficient method to record hours for **multiple** work orders, but you may find it easier to record hours for a **single** work order from the *Work Order / Charges–Labor* Subtab.

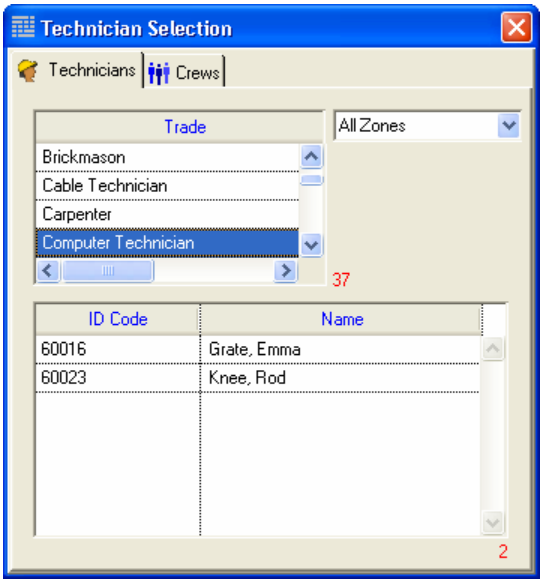
Recording Time from Work Order

Path: Transactions > Work Order > Records / Charges–Labor Subtab

1. Locate the *Work Order* record.
2. Click *Edit* on the TMA toolbar.
3. Click the *Charges* Tab. The default view is the *Labor* Subtab.
4. Place the cursor in the *Technician ID* field. You can also use the right-click context menu to *Copy all scheduled technicians to labor list* from the *Schedule* Tab.
5. Type or select the *Technician* or *Crew ID*.

   To view a list of technicians associated with a specific trade, select a *Trade* or *All Trades* (Dispatcher access only) on the *Select Technician* window.

   From the lower portion of the *Technician Selection* window, select the name of the technician who performed the work. Double-click to populate the *Technician ID* field. When a technician is selected, the fields for *Time Type*, *Trans Date*, *Shift,* and *Account* will populate if the default information has been set up in TMA.



6. Accept or select the default *Time Type*. The default is determined by your repair center affiliation.
7. Accept or select the default *Trans Date*. This is the date that work was actually performed.
8. Accept or select the default *Shift*. The default is the first shift unless the selected technician has an assigned shift set up in the technician record.
9. Type the number of *Hours* worked by the technician.

   TMA software calculates the total cost of labor by multiplying the hours worked by the charge rate for the selected technician (established on the *Technician* window). Other costs such as rate multiplier and shift differentials are also considered in the calculation if these are used.
10. (Optional) Type or select the *Account #*. This refers to the credit account of the department responsible for providing the work; typically this is the maintenance department or the labor account number for the technician. This is a required field only if the work order is specified as chargeable on the *Work Order / Identity* Tab.

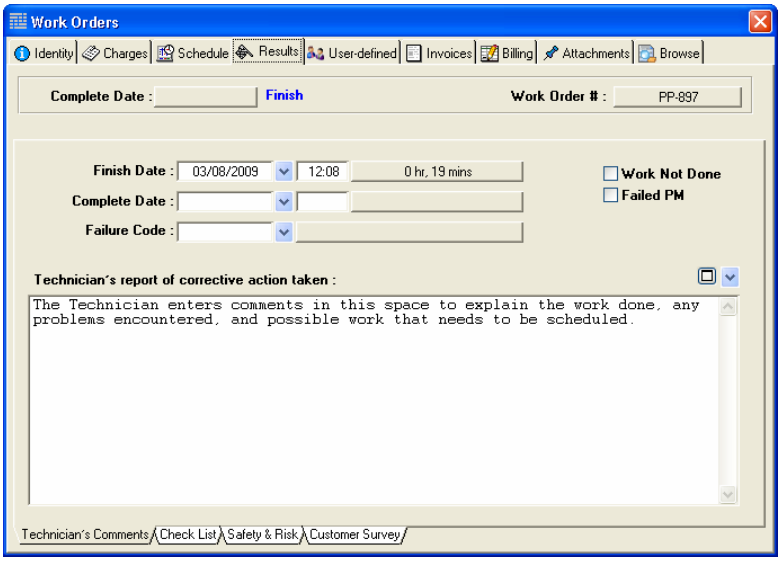
    A work order is made chargeable (or not) by designating YES or NO in the *Charge?* field of the *Work Order / Identity* Tab screen. If YES is in the field, the work order is chargeable.

When you tab through the *Account #* field, a new active data line appears, and you can add hours for additional technicians.

Results Tab – Technician's Report

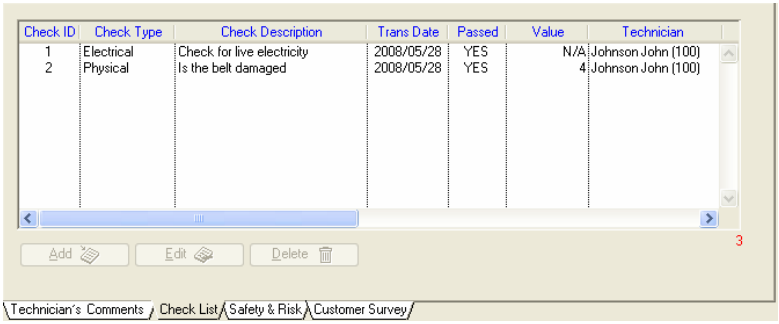
Path: Transactions > Work Order > Records / Results Tab

The *Technician's Comments* Subtab on this window includes a large text *Technician's report of corrective action taken* field that provides space to type actions made by the technician. In addition, other notations regarding the work order are added here.



Results Tab – Check List

Path: Transactions > Work Order > Records / Results–Check List Subtab



The *Check List* Subtab on the window displays any required actions where the technician can check off the items and mark as Pass/Fail or other results.

Checks can be added to the window. In most cases, they are associated with a specific task, and the technician clicks the *Edit* button on the window to add his or her findings.

Chapter 8
Closing Work Orders

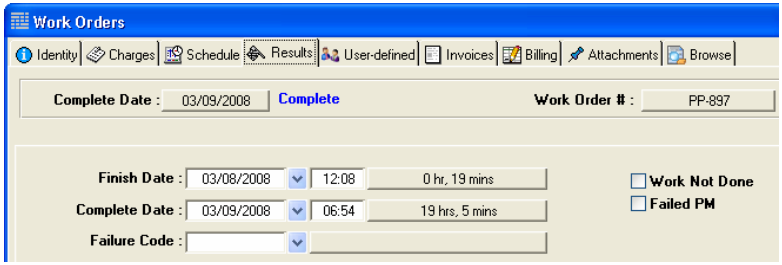
Overview

Path: Transactions > Work Order > Records / Results Tab

A date entered in the *Finish Date* field on the *Work Order / Results* Tab indicates that the work itself is done but some requirements are outstanding. A date in the *Complete Date* field on this window indicates that the work order is **closed**; however, labor hours and other costs can be added to a closed work order.

A closed work order can also be reopened to add information if the user has appropriate privileges. Work orders are reopened by clearing the *Complete Date* field.

How to Close Work Orders



Path: Transactions > Work Order > Records / Results Tab

Work Orders can be closed in the *Work Order* window or from the TMA *Quick Post* function. See the previous chapter for details on closing work orders using *Quick Post*.

Follow these steps to close a work order from the *Work Order* window:

1. Open the *Work Order* window.
2. Locate the completed work order.
3. Click *Edit* on the TMA toolbar.
4. Click the *Results* Tab.
5. Type the date that the work was finished in the *Finish Date* field. The time of day defaults to the current hour and minute but can be modified.

When the *Complete Date* field is populated a work order is seen as **closed** by TMA.

The read-only fields display the length of time the work order has been open, **not** the number of hours worked.

The software calculates the time elapsed from the request *Date/Time* to the *Finish Date* or *Complete Date* and *Time* fields on the *Work Order / Results* Tab.

Note The time elapsed is **not** a record of the labor hours for the work order. The *Finish Date* does not impact TMA reports, but the *Complete Date* is used in reports.

Failure Codes

Path: Transactions > Work Order > Records / Results Tab

Failure codes are used in conjunction with the planned maintenance and work order modules. The failure code is an **optional** field used to track failures related to equipment, vehicles, areas, and assets.

A Failure Analysis report is available in *Report Manager / Status* that allows you to review the PM or work order that failed, why it failed, and how frequently failure occurred.

The *Failure Code* field includes a down arrow so you can select the reason for failure.

You can track failures with the Failure Analysis Report for all types of work orders. They do not have to be related to PM work orders.

Failed PM

If the item or area identified failed on the PM work order, click the *Failed PM* check box on the *Work Order / Results* Tab to indicate the failure.

Work Not Done

If no action is taken on a work order, click the *Work Not Done* check box to indicate the fact that the PM or task was not completed because of the failure.

Note You may check **both** the *Failed PM* and *Work Not Done* boxes.

Report Options

Management Reports

Path: Reports > Report Manager / Management tab

The following identifies some of the more frequently used reports related to work orders. It is not an all-inclusive list.

Work Order Status by Facility – A summary list of all work orders, both open and complete, subtotaled by repair center including a breakdown by facility. Work orders qualify if the request or completion date falls within the date range specified.

Work Order Status by Repair Center – A summary list of all work orders, both open and closed, subtotaled by repair center. Work orders qualify if the request or completion date falls within the date range specified.

Work Order Completion Summary – A summary of all completed work orders. Information available: work order type, number of work orders, labor cost, part cost, and total cost. Options: By selected repair center or all repair centers.

Trade Work Order Report – A list of all work orders requested within a specified date range, sorted by trade. This report shows all trades for multi-trade work orders. For this reason, work orders are repeated for each trade. Cost and hours for the total work order are reflected on each trade. For purposes of this report, the terms 'open' or 'complete' refers to the specified trade only.

Status Reports

Path: Reports > Report Manager / Status

Complete Work Orders – Work orders completed for a selected date range.

Failure Analysis – A detailed list of failures reported on work orders for equipment, vehicles, assets, and areas. Information available: work order # dates, requested action, and corrective action taken.

Chapter 9
PM Generation

Introduction

Planned Maintenance (PM) is a function that allows you to schedule PM procedures for areas, equipment, assets, vehicles, tools, entities, or groups.

PMs are scheduled for fixed or floating dates and for frequency intervals such as daily, weekly, monthly, yearly, or unit.

Once items have been scheduled, work orders can be generated from the *Transactions* > *Generate PMs* menu.

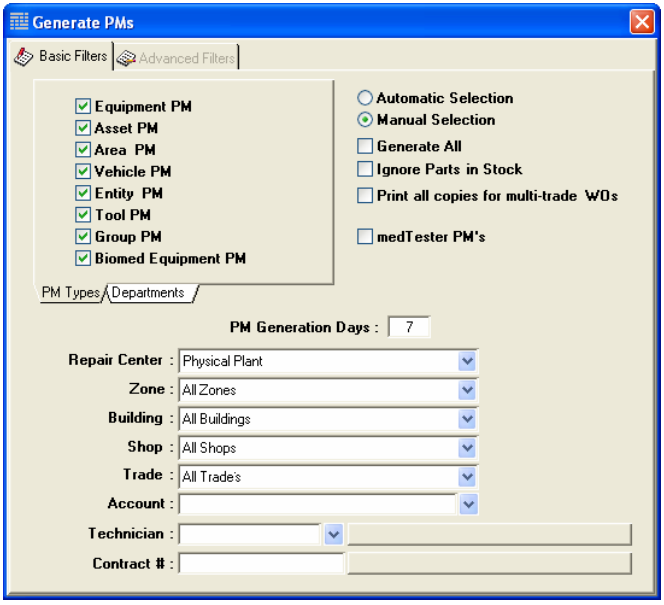
This TMA *Basics Guide* assumes the PM schedules have been established and are available for generation.

Generating PM Work Orders

After the schedules for planned maintenance items are established using the *PM Scheduler* window, generating the work orders requires human interaction to start the process. Someone in your organization must be assigned the responsibility for generating PM work orders on a regular basis.

At some work sites, this task may occur on a weekly basis; at others it may be monthly. The time frame used to search ahead for PMs that need to be generated is defined by each repair center. If that number is defined as 7, the system looks for PMs due in the next 7 days from the day PMs are generated.

PM Generation Window



Path: Transactions > Generate PMs / Basic Filters

The *Generate PMs* window is designed to give you numerous filters so you can have PM work orders only for the items you want.

Basic Filters

The *Basic Filters* Tab has a number of default settings identified below. When generating PMs, you can select your desired settings.

PM Types – All item types are selected by default. Click to clear a check box. Only items with a mark in the check box will be available for PM generation.

Departments - All departments are selected by default. Click to clear a check box. Only departments with a mark in the check box will be available for PM generation.

Manual Selection – A preview list of scheduled PMs that are due. This option is preferred until you are familiar with the results from your selections. From the preview list, you can elect to generate some or all PMs.

PM Generation Days - The number of calendar days you want to include in this generated list of PMs. The default number displayed is set by your TMA System Administrator in *Organization > Repair Center > Records / Preferences*.

Repair Center – The user's assigned repair center. (Users with Dispatcher access have other options.)

Zone - *All Zones* is selected by default. Click the down arrow to choose a specific zone. If one zone is selected, only that zone will be used for PM generation.

Building – *All Buildings* is selected by default. Click the down arrow to choose a specific building. If one building is selected, only that building will be used for PM generation.

Shop – *All Shops* is selected by default. Click the down arrow to choose a specific shop. If one shop is selected, only that shop will be used for PM generation.

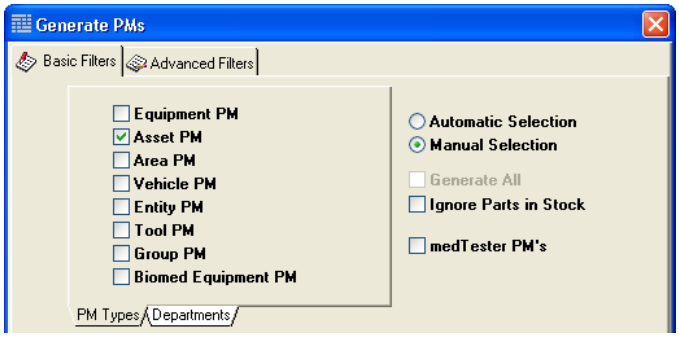
Trade – *All Trades* is selected by default. Click the down arrow to choose a specific trade. If one trade is selected, only that trade will be used for PM generation.

Account, Technician, Contract # – These fields are blank by default. You can type or select the account and technician.

When a specific technician is selected on the *Generate PMs* window, only PMs assigned to the technician you select will be generated. When a technician is selected, all other criteria (risk level, buildings, and types of schedules) are disregarded in the search.

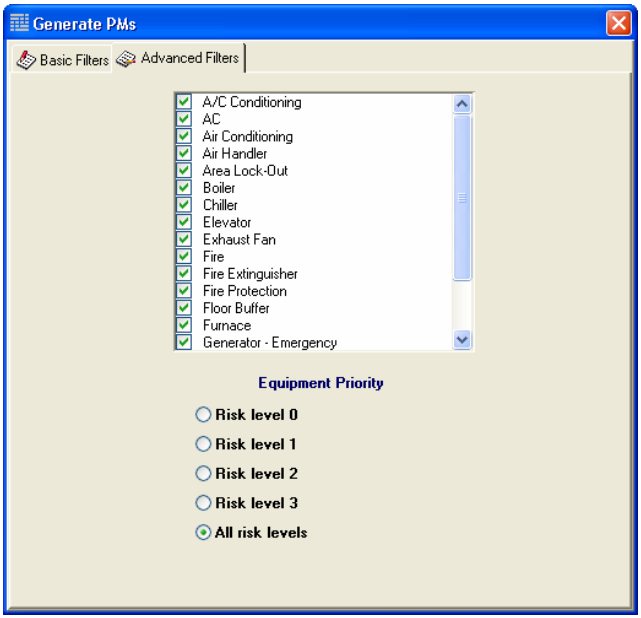
Advanced Filters

The *Advanced Filters* Tab is enabled when only one *PM Type* is selected.



Click the *Advanced Filters* Tab to select the types.

If *Equipment PM* is selected, additional *Equipment Priority* fields are also available on the *Advanced Filters* Tab.



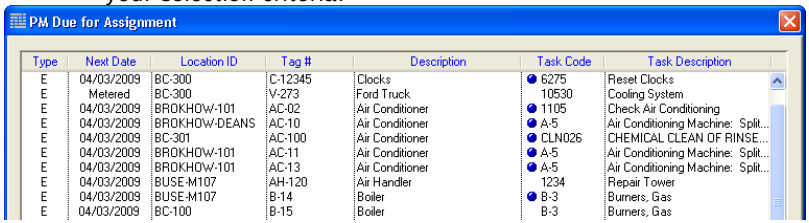
Equipment Priority – The *All risk levels* radio button is selected by default. Click a radio button to select a specific level. As with all radio button choices, only one button can be selected. This information relates to the *Risk Level* field on the *Organization > Equipment / Identity* Tab.

How to Generate PM Work Orders

Path: Transactions > Generate PMs / Basic Filters

1. Open the *PM Generation* window. You can also use the keyboard shortcut Ctrl+Shift+G (Command+Shift+G for Macintosh).
2. Determine the selection criteria the system will use to generate PM work orders.
3. Click *OK* on the TMA toolbar.

   If you are using manual selection, the *PM Due for Assignment* window opens for you to view a list of PM schedules that meet your selection criteria.



Type	Next Date	Location ID	Tag #	Description	Task Code	Task Description
E	04/03/2009	BC-300	C-12345	Clocks	6275	Reset Clocks
E	Metered	BC-300	V-273	Ford Truck	10530	Cooling System
E	04/03/2009	BROKHOW-101	AC-02	Air Conditioner	1105	Check Air Conditioning
E	04/03/2009	BROKHOW-DEANS	AC-10	Air Conditioner	A-5	Air Conditioning Machine: Split...
E	04/03/2009	BC-301	AC-100	Air Conditioner	CLN026	CHEMICAL CLEAN OF RINSE...
E	04/03/2009	BROKHOW-101	AC-11	Air Conditioner	A-5	Air Conditioning Machine: Split...
E	04/03/2009	BROKHOW-101	AC-13	Air Conditioner	A-5	Air Conditioning Machine: Split...
E	04/03/2009	BUSE-M107	AH-120	Air Handler	1234	Repair Tower
E	04/03/2009	BUSE-M107	B-14	Boiler	B-3	Burners, Gas
E	04/03/2009	BC-100	B-15	Boiler	B-3	Burners, Gas

NOTE: If you click the *Automatic Selection* button to automatically generate all PM schedules, this option does not allow a preview of the list or an opportunity to make selections before creating PM work orders.

4. Highlight the desired lines.

For multiple selections, use the Microsoft multiple selection convention Shift+Click for adjacent lines in the list or Ctrl+Click for non-adjacent lines.

5. Click *OK* on the TMA toolbar to generate a PM work order from the *PM Due for Assignment* window.

   A message box prompts you with a query to print all PM items just generated.

6. (Optional) Click *No* to exit the message window and return to the home screen. You can always print them individually from the work order window if needed.

7. Click *Yes* for available print options.

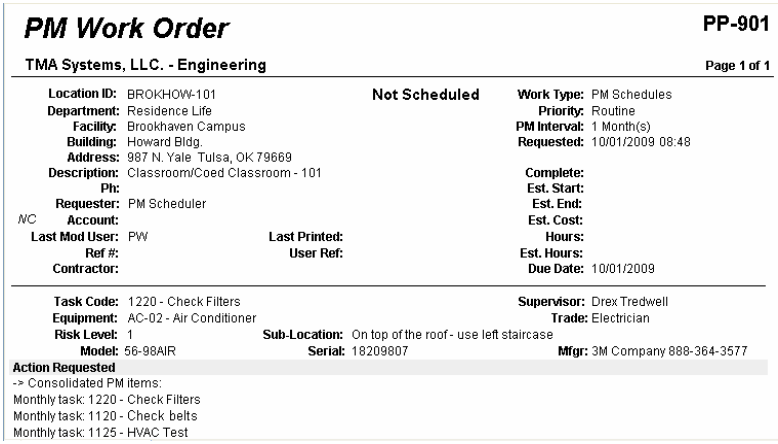
All items generated are printed as a work order.

The *PM Due for Assignment* list may include some past due schedules. If a PM schedule is due but is never generated into a work order, it remains available for the PM generation list until generated.

A blue icon next to a task code in the list indicates the line item is a consolidated PM – that is, it includes more than one PM. In consolidated PMs, all PM tasks are included on a single work order.

Sample PM Work Order

A partial view of a PM work order generated by the PM Scheduler is shown below. If a PM task sheet has been completed for the PM task, the procedure is printed on the work order.



PM Work Order **PP-901**

TMA Systems, LLC. - Engineering **Page 1 of 1**

Location ID: BROKHOW-101
Department: Residence Life
Facility: Brookhaven Campus
Building: Howard Bldg.
Address: 987 N. Yale Tulsa, OK 79669
Description: Classroom/Coed Classroom - 101
Ph:
Requester: PM Scheduler
NC **Account:**
Last Mod User: PW
Ref #:
Contractor:

Not Scheduled
Last Printed:
User Ref:

Work Type: PM Schedules
Priority: Routine
PM Interval: 1 Month(s)
Requested: 10/01/2009 08:48
Complete:
Est. Start:
Est. End:
Est. Cost:
Hours:
Est. Hours:
Due Date: 10/01/2009

Task Code: 1220 - Check Filters
Equipment: AC-02 - Air Conditioner
Risk Level: 1
Model: 56-98AIR
Sub-Location: On top of the roof - use left staircase
Serial: 18209807
Supervisor: Drex Tredwell
Trade: Electrician
Mfgr: 3M Company 888-364-3577

Action Requested
-> Consolidated PM items:
Monthly task: 1220 - Check Filters
Monthly task: 1120 - Check belts
Monthly task: 1125 - HVAC Test

PM Generation – Options for Refining the Search

To narrow the search when generating PM work orders:

- Clear a check box next to one or more PM item types in the *Select PM Schedules* section. This narrows the search to include only PM item types that are marked.
- Click a radio button in the *Equipment Priority* section of the *Advanced Filters* tab to generate a PM for specific Equipment Priority/Risk Level. If you do not have sufficient time or

resources available to complete all of the equipment PM schedules, the *Equipment Priority* options allow you to generate those with the highest risk factors first.

- Generate PM schedules for a particular building by choosing the building from the selection list in the *Select Building* field.
- Generate PM schedules assigned to a particular technician by selecting the name from the *Select Technician* window opened from the *Technician* field. When a technician is selected, all other criteria (such as priority, buildings, and types of schedules) are disregarded in the search.

Note Selection of Asset PM and Tool PM are available in WorkGroup and Enterprise only.

Report Options

Following are some of the many reports related to generating planned maintenance work orders that are available in the TMA *Report Manager*.

PM Reports

Path: Reports > Report Manager / PMs

PM-Complete – All complete PM work orders with a completion date within the specified date range. Selection criteria include date range and repair center. Information available: work order, location information, task code, and description, tag #, and request date. Totals include: Total number of PMs, materials cost, and labor cost.

PM-Open – All open PM work orders with request date within the specified date range. Selection criteria include date range and repair center. Information available: work order, location information, task code, and description, tag #, and request date. Sorted by request date.

Appendix A

TMA Menus

File

Open Library	Used for accessing the TMA software files.
Preferences *Page setup* *Set print destination* *User Preferences*	These options include change printer settings, toggle text on the toolbar menu, and background display.
Bookmarks *Add Bookmarks* *Edit Bookmarks*	This selection allows users to flag records for quick retrieval.
Statistics	A tabbed window display of the current number of records and table schema within TMA software.
TotalView	Cascading list of all records set up in the data file.
My Tasks	A reminder list that is created from the *Attachment* tab window in a number of TMA functions.
GIF Viewer	A window to view .gif graphics files
Page Technician	A window used to send paging messages.
Message History	A searchable message log used to locate previous messages.
Log off	Allows user to log out of TMA software and log back in without re-launching the application.
Quit	Closes the TMA software program.

Edit

Standard edit menu options for editing (cut, paste, select all) fields and records in TMA software.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

Transactions

Request *Log* *Batch Validation* *Browse*	Allows users to store all work requests in one place, giving the option to reject or accept the requests. Accepted requests can be changed into a work order from these windows.
Work Order *Records* *Browse* *Batch Print* *Confirmation* *Individual Billing* *Quick Work Order* *Authorization*	Access to the Work Order records as well as features related to browsing, confirming, authorizing, and printing existing work orders.
Quick-Post *Time & Labor* *Material* *Rental/Other Charges* *Labor by Technician* *PM Meters* *Fuel & Oil* *Training* *CM Readings* *Down Time* *Refrigerant Service*	Used to batch post data for faster processing.
Time Manager *Time & Attendance* *Staff Schedules* *Scheduler* *Calendar* *Review Assignments* *Batch Attendance* *Gantt Review*	Menus used to view technician's schedules, assign open work orders, plan schedules, and review assignments on a daily and weekly basis. Gantt review of all work orders for a given day or by individual trade or technician.
Refrigerant Service	Document use of refrigerant from a cylinder (or piece equipment).
Fuel & Oil	Document individual fuel and oil ticket items along with payment and billing information.
Returns & Repairs	Track defective items that are returned to the manufacturer or vendor for refund or repair.
Project *Records* *Browse* *Requisitions* *Gantt Chart*	TMA software defines a Project as a work request that requires multiple work orders. All expenses, including labor, material and other charges are linked automatically to the project. Gantt charting is available for tracking progress of the project.
Estimate *Records* *Change Orders*	Estimates linked to any Request, Work Order, Project, or Project Task. When any estimated items are converted to a Work Order, the TMA software automatically links the original *Estimate* information to the Work Order.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

TRANSACTIONS

Pending Authorization	Used with TMA Authorization Routing.
Generate PMs	Used to generate work orders from scheduled planned maintenance tasks that are currently due. Users can select all or specific categories (i.e., equipment, areas, vehicles, etc.) and have the option to generate all or manually pick from the list.
Facility Scheduler *Reservation Request Wizard* *Reservation Request* *Reservation* *Expense Ticket* *Reservation Request* *Planboard* *Reservation Planboard*	Used with the optional Facility Scheduler module to request and reserve Facility areas and items such as equipment and tools. Vehicles are requested and reserved using the Fleet Management option module.

Materials

Vendors	Contains detailed contact information related to Vendors and outside Contractors who provide Materials or labor.
Manufacturers	Details contact information regarding manufacturers of equipment and linked to item records.
Warehouse	Records related to warehouses and linked to part records with additional feature to select a repair center to filter access for facilities using multi-repair centers.
Parts *Records* *Kits* *Transfers* *Cross Reference*	Detailed information about a stocked item. Items can be cross-referenced to equipment, vendor, or vehicle records.
On-hand Adjustments	Tracks adjustments, both positive and negative; worker return; order arrival; part issuance; and defective parts. Automatically logs parts entered on the Work Order to track stock movement in and out of the Warehouse.
P-Card *Transactions* *Reconcile*	Used to record and track purchases made with Purchase Cards.
Purchases *Requests for Quote* *Purchase Reqs* *Purchase Orders* *Change Order* *Stock Replenishment Wizard* *Receivings*	Used to request a pricing Quotation, to request authorization from a manager to place an order for parts or materials, or to issue an order from Vendors. Quotes and Requests can be converted into a Purchase Order within TMA software. Receipt of purchased items is tracked through Receivings.
Sales *Material Request* *Sales Order*	Used to request and sell material from the Warehouse to other departments within the organization. Includes accounting functions.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

MATERIALS

Material Browse	Used to review lists of items that have been requested or purchased from Vendors or the Warehouse.
Tools *Records* *Transfers* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets*	Used for recording information on tools and tool usage, including PM. Transfer the "home base" for tools to a new location. If you purchase the Facility Scheduler module, the Tools reservation-related menu commands are also available.
Hazardous Materials	Used for tracking specific details on hazardous material, including MSDS files, and user precautions.
Refrigerants	A record of Refrigerant types, volume, location, condition, and other pertinent information.

Accounting

Accounts	Table for defining account numbers and account descriptions from which expenses may be charged or credited. When work orders are written and charges are posted to an account, TMA software rolls up the labor cost, hours, and material costs to the account record.
Contracts	A record of Contracts held with outside service providers.
Rate Schedules	Markups applied to line items.
Depreciation	TMA software allows the user to track depreciation on equipment, assets and vehicles.
ACI	Asset Condition Index used to compare the condition of assets on a yearly basis.
Post Charges	Used to roll up costs to the respective accounts.
Project Rollups	A process used to roll up the totals for work orders and project requisitions into the Project record account fields.
Cost Rollups	Used to posts costs to the appropriate accounts.
Accounts Receivable Invoices *Payments*	Records to batch pay, view, add and delete account receivables. User access must be available.
Accounts Payable *Invoices* *Payments*	Records to batch pay, view, add and delete account payables. User access must be available.
Purge Accumulatives	Shifts accumulative display of year-to-date or month-to-date to the next level in record windows. TMA software holds four years of previous data plus the current year.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

Organization

Lookups	Used for entering pick list data and defining categories of items displayed in selection windows and for distinguishing data for report options.
Repair Center *Records* *Shops* *Technicians* *Crews*	Used to establish criteria to access, display and report information within TMA software related to areas of responsibility. Technician records are linked to trades, shops, and repair centers from this menu. TMA eXpress is limited to one Repair Center.
Departments	Records of individuals or organizations that occupy or have financial responsibility for maintenance costs incurred for certain spaces within the facility (can be linked to other records in the TMA system).
Customers	Information about the people in your organization who use the items and services provided by your facility maintenance department.
Facility	Records for the highest level of the 3-tier location hierarchy in TMA software and for non-structural components of a Facility that require maintenance (entities). Ultimately all costs (both Building and Area costs) roll up to the Facility level.
Building *Records* *Sites* *Leases* *Trip Standards*	The second level of the three-tier location hierarchy contains all the building records within a facility and associated site and lease information. Labor, materials, and other costs roll up from associated work orders.
Area *Records* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets* *Inspection Forms* *Inspections* *Inspection Browse* *Load Inspections* *Inspection HotSync Setup* *HotSync Messages*	The third and lowest level identifier in TMA software's three-tier-location hierarchy. Most items in TMA software are linked to area records. All associated costs roll up to the Building where the Area is linked. The Area level is usually synonymous with the rooms within a Building. Reservation commands are available if you have purchased the Facility Scheduler optional module. Inspections commands including HotSync Messages are part of the the Room Inspection optional purchase module.
Entity *Records* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets*	Standalone items such as benches, lamp posts, and portable signs can be classed as entities. Reservation commands are available if you have purchased the Facility Scheduler optional module.
Zones	An optional method to associate items in a geographic area.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

ORGANIZATION

Equipment *Records* *Transfers* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets*	Mechanical or electronic items that may require a planned maintenance schedule. Reservation commands are available if you have purchased the Facility Scheduler optional module.
Biomed Equipment *Records* *Transfers* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets*	Clinical Engineering mechanical or electronic items used by Healthcare licensees. Reservation commands are available if you have purchased the Facility Scheduler optional module.
Asset *Records* *Transfers* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets*	Non-mechanical items that require maintenance. Reservation commands are available if you have purchased the Facility Scheduler optional module.
Vehicle *Records* *Transfers* *Reservation Request Wizard* *Reservation Requests* *Reservations* *Expense Tickets* *Reservation Request Planboard* *Reservation Planboard*	Detailed records of Vehicles within a facility. Reservation commands are available if you have purchased the Fleet Management optional module.
Group *Records* *Checks*	Records of multiple items collected to save time when scheduling and applying the same job/task, including preventive maintenance and condition checks.
Cable Tracking *Cables* *Cable Pairs* *Jacks* *Panels*	(WorkGroup & Enterprise only) Allows the user to track Cables, the Pairs that comprise the Cables, Panels, Jacks, and connected equipment to produce a complete signal trace from the Panel of origin to the Jack or connected device.
Task *Library* *PM Scheduler* *PM Load Balancing* *Master Check Items*	A Library and Scheduler that contains Task codes and Task descriptions defining Tasks that can be assigned to a Work Order and/or to create a calendar or meter schedule to generate PM Work Orders.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

Reports

Report Manager	More than 350 report options and graphs with optional criteria
Active Reports	An advanced report writer designed to help the user create custom reports that are not included with the Report Manager.
Ad hoc Reports *New* *Open*	A flexible report generator designed to help the user create custom reports that are not included with the Report Manager.
Crystal Reports *New* *Open*	You can use this interface connection to include reports in TMA that you created outside of TMA using Crystal Reports.
Data Dictionary	Utility to store the current design library file formats to the data file.
Data Collections Form	Forms used to assist in collecting initial data on items to be entered in the TMA system.
Executive Dashboard	Used to view the Dashboard monitors created using the options Executive Dashboard module.
SQL Query Window	Used by Advanced TMA administrators.

Admin

Preferences	Fields to set date format; to set counters for Purchase Orders/Requisitions and Projects, and to establish some global changes to nomenclature within TMA software. Also allows user to choose inventory valuation method and default cash account.
LDAP Setup	Used to configure LDAP Settings from TMA.
***i*ServiceDesk** *Server Manager* *Secured Pages* *RetrieveHTML*	Used by clients who purchase the optional *i*ServiceDesk module to set up and administer users and HTML pages.
Security *Groups* *Users*	Records to determine a user's level of access to windows and records in TMA software.
Approval Routing	Used to set up the routes for clients who use the Routing Authorization System.
Executive Dashboard *Dashboards* *User Assignment*	Used by clients who have purchased the optional Executive Dashboard module to create, edit, and assign the Dashboard displays.
Field Attributes Editor	Option to designate properties of fields within a record.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

ADMIN	
Single User Functions	Used to view and release users logged using Post Project, Post Charges and PM Generation functions.
View Logins	Used by the TMA System Administrator to review the users who are logged in to TMA.
Purge Records	Utility to purge records from the TMA Data File. Use with caution.
Activate All	Used to activate all records previously tagged Inactive.
SQL Error Log	Used by Advanced TMA administrators to view SQL Errors.

Options

Retrieve E-mail Requests	The selections on this menu provide access to purchased options available with the TMA Studio products, with the exception of Barcode Manager. TMA supplies bar code fonts to WorkGroup and Enterprise clients so Work Order numbers and other items can be printed as bar codes.
CAFM	
Event Scheduler	
Key Management	
Utility Management	
mobileTMA	

Commands

Menu selection of commands used to perform basic records handling functions.

Help

Access to Help files associated with the TMA software. Also includes the *About TMA* menu that provides specific information used by TMA Technical Support.

Spell

Spell checking by field or by window.

Window

Displays information about open windows and allows user to close or print a window.

Depending on the Purchase Options and TMA version you use, menu commands will vary. Not all menu commands are available with all versions of TMA.

Appendix B

Shortcut Overview

TMA includes numerous keyboard shortcuts to enhance the efficiency of data entry. Key combinations that use the Ctrl (or Command for Macintosh), Shift, and forward slash (/) keys in conjunction with alpha characters can save time when you are entering large amounts of data.

Since the Tab Key is recommended for moving from field to field, you can use the shortcuts to quickly complete a window and rarely use the mouse.

Selection Lists

When you tab out of a **blank required** field that has a selection list, the list will open automatically. If the selection list has an upper and lower pane, use Shift+Tab to toggle between the panes of the selection list and press the up or down arrow keys on the keyboard to make your selection. Press the Enter key, and the field is populated.

Definitions

The following terms are used throughout the documentation:

tab out - press the Tab Key on the keyboard to move the cursor to the next field.

fields with selection lists - fields that have an arrow button at the right end of the field (usually referred to as the down arrow). This arrow indicates that a separate window can be opened to make selections and populate the field.

required fields - fields that must be completed before you can save a record.

Slash Key Uses

The slash key can be used alone or in combination with alpha characters to open selection lists or populate other fields in the *Work Order* windows, *Quick Post* windows, and *Biomed Equipment*.

Work Orders

When entering work orders, you can use the forward slash key in various ways depending on the amount of information you have

available. For instance, if you have the *Tag #* of an item, you can use it in a slash key combination to complete required fields. The topic titled New Work Order – All Fields Blank includes an example.

You can also type the forward slash and tab out of non-required fields that have selection lists to open the selection list window.

New Work Order – All Fields Blank

IMPORTANT: The following technique works **only** if the *Location ID, Building/Area* and *Tag#* fields are empty when the shortcut is used.

These steps apply to a work order written for an Equipment item that has a known tag number:

1. Click the *Add* button on the TMA toolbar.
2. Type /E followed by the *Tag#* in the *Location ID* field.
3. Tab out of the field.

When you tab out, the *Location ID, Building, Area* and *Tag #* fields are populated.

Example: Type /EB-2365 to populate the required *Location ID* and related fields with information about a piece of equipment (E) with the tag # B-2365.

The same procedure applies to any of the following items on a work order. Follow the steps outlined above and use the alpha character and tag # that apply to the item you want.

/G – Groups

/N - Entities

/V - Vehicles

/A - Assets (WorkGroup and Enterprise)

/T - Tools (WorkGroup and Enterprise)

Reminder: This technique works **only** if the *Location ID, Building/Area* and *Tag#* fields are empty when the shortcut is used.

Work Order – Non-Required Fields

If a down arrow  is present at the right end of a non-required field, type a slash and tab out of the field. This should open the selection list.

Selection lists can always be opened by using the mouse to click the down arrow.

Quick-Post Windows

When you post work orders using the *Quick Post* function, use the slash + character technique to limit the items on the selection list to those of a particular type. The following apply to:

Quick-Post Time and Labor

Quick-Post Material

Quick-Post Other Charges

Rather than typing the work order number in the *Work Order* field, you can use one of the shortcut entries (/R, /E, /G, /V, /A, /T) and tab out to open a selection list of work orders that show:

Areas (/R)

Equipment (/E)

Groups (/G)

Vehicles (/V)

Assets (/A) (WorkGroup and Enterprise only)

Tools (/T) (WorkGroup and Enterprise only)

Biomed Equipment

Since the location hierarchy rules are different for biomed equipment, you can override the current location for a piece of biomed equipment by using the /B shortcut. This shortcut breaks the association with the previous location and uses the new location.

The format is: [NewLocation]/B[TagNumber]

Example:

New Location = B-100

Tag Number = JL2705

The shortcut is entered as: B-100/BJL2705

This shortcut applies to biomed equipment **only**.

Date Fields

The slash key technique does not work with date fields, however, you can type the numeric day or day and month and tab out. TMA will format the entry and add the current year to the date.

Examples:
If you type the number 9 and tab out of the field, the field will change to read: Current month/09/current year.

or

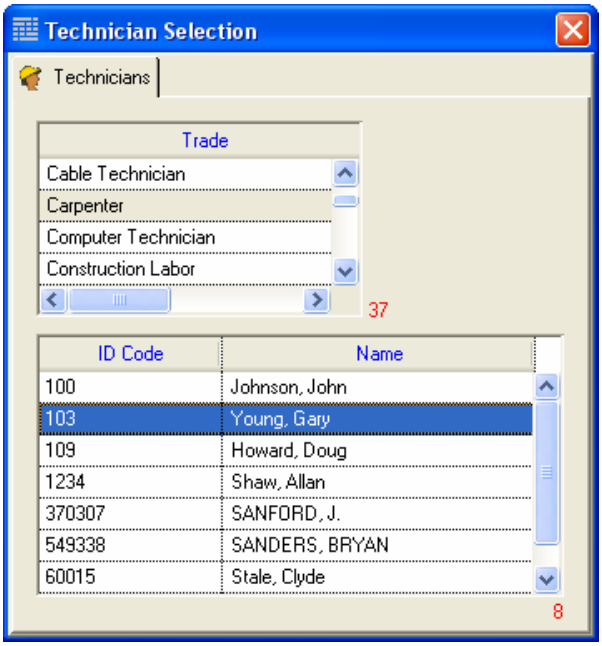
If you type 1023 and tab out, the field will display 10/23/current year.

Selection Windows Search

If you want to search a character or character string in selection popup windows, these tips help expedite your efforts.

Many selection windows are multi-paned. When the window opens, the focus is in the top pane. You can select a term in the first pane by typing the first character or characters. A line item is highlighted immediately.

Once you have highlighted a line in the upper pane, press the Tab key to move the focus to the lower pane. You can type the initial characters again to search for an item, **or** you can search for a character within a string using the asterisk wild card (*). The wild card technique also works for popups in a single-pane list.



The following steps outline the process:

1. Type a character in the upper pane to locate the desired line.
2. Press the Tab key.
3. Type an asterisk using Shift+8.
4. Type the character or characters you seek.
5. Use the plus (+) and minus (-) keys on the numeric keypad to move forward and backward through the list to view other line items that contain the character or characters you specified.

Keyboard Combinations

You can use key combinations to achieve the same results as point and click. These key combinations are available for the TMA toolbar, the menu bar, TMA function menus and several miscellaneous functions. Note: The same combinations apply to Macintosh users, but the combination uses the **Command** key ( ) rather than Ctrl, i.e., Command+A is used to add a record, etc.

TMA Toolbar

Keys	Equivalent Mouse Click
Ctrl+A	TMA Add Record (Add button)*
Ctrl+E	TMA Edit mode (Edit button)
Ctrl+D	TMA Delete Current Record (in View mode)
Ctrl+F	TMA Find Record (Find button)
Ctrl+N	TMA Next Record (Next button)
Ctrl+P	TMA Previous Record (Prev button)

Keys	Equivalent Mouse Click
Ctrl+-	Find First
Ctrl++	Find Last
Ctrl+R	TMA Print (Print button)
ESC	TMA Cancel button
Enter	TMA OK button

*Ctrl+A serves double duty (see File and Edit Menu Options next).

File and Edit Menu Options

Keys	Equivalent Mouse Click
Ctrl+Q (File)	Exit TMA (*File* > *Quit*)
Ctrl+Shift+L (File)	Log off (*File* > *Log off*)
Ctrl+A (Edit)	Select All (in a particular field)
Ctrl+C (Edit)	Copy (selected data from a field)
Ctrl+V (Edit)	Paste (selected data to a field)
Ctrl+X (Edit)	Cut (selected data from a field)
Ctrl+Z (Edit)	Undo (before tabbing to next field)
Delete key	Clear selected text

Miscellaneous

Keys	Equivalent Mouse Click
Ctrl+Q	Quit the application
Ctrl+W	Close Current Window
Ctrl+TAB	Next Tab window (Identity, etc.) - Studio
Alt+C	Comments window on Quick Post Time & Labor
Ctrl+Shift+L	Log off
F1	Help
F4	TotalView
F6	Edit Bookmark
F7	Spell check a field
Shift+F7	Spell check a window
Alt+F7	Spell Checker Options
;	Previous window - Classic
,	Next window - Classic

Function Windows

Keyboard equivalents using both Ctrl and Ctrl+Shift are used to open thirty-three TMA windows. To help you find the code, the information is organized in two ways. The following combinations are sorted by window name (in alphabetical order) and then by key combination. Note: The same combinations apply to Macintosh users, but the combination uses the **Command** key ( ) rather than Ctrl, i.e., Command+Shift+E is used to open a Building record, etc.

SORTED BY WINDOW NAME

Equivalent Mouse Click	Keys
Area Records	Ctrl+K
Asset Records	Ctrl+G
Biomed Equipment	Ctrl+U (TMA Client/Server)
Buildings Records	Ctrl+Shift+E
Checks & Conditions Records	Ctrl+Shift+J
Contracts	Ctrl+Shift+K
Departments Records	Ctrl+Shift+D
Entity Records	Ctrl+Y
Equipment Records	Ctrl+L
Generate PMs	Ctrl+Shift+G
Hazardous Materials Records	Ctrl+Shift+H
Manufacturers	Ctrl+Shift+N
Materials Browse	Crtl+Shift+S
On-Hand Adjustment Records	Ctrl+Shift+A
Part Records	Ctrl+I
Personnel/Technician Records	Ctrl+H
Projects Records	Ctrl+Shift+P
Purchase Requisitions Records	Ctrl+O
Quick Post - Labor by Technician	Ctrl+Shift+F
Quick Post - Material	Ctrl+Shift+M
Quick Post - Other	Ctrl+Shift+O
Quick Post - Time & Labor	Ctrl+Shift+T
Receivings	Ctrl+Shift+I
Refrigerants Records	Ctrl+Shift+Y
Report Manager	Ctrl+Shift+R
Request Batch Validation	Ctrl+Shift+U
Request Browser	Ctrl+Shift+B
Sales Order Records	Ctrl+S
Scheduler	Ctrl+Shift+Q
SQL Query Window	Ctrl+1
Task (Job) Library	Ctrl+J
Time & Attendance	Ctrl+Shift+V
Tools Records	Ctrl+Shift+C
Vehicles Records	Ctrl+Shift+Z
Vendors	Ctrl+Shift+X
Warehouse or Stockroom	Ctrl+Shift+W
Work Order Browse	Ctrl+T
Work Order Records	Ctrl+M

SORTED BY KEY COMBINATION

Keys	Equivalent Mouse Click
Ctrl+1	SQL Query Window
Ctrl+G	Asset Records
Ctrl+H	Personnel/Technician Records
Ctrl+I	Part Records
Ctrl+J	Task (Job) Library
Ctrl+K	Area Records
Ctrl+L	Equipment Records
Ctrl+M	Work Order Records
Ctrl+O	Purchase Requisitions Records
Ctrl+S	Sales Order Records
Ctrl+T	Work Order Browse
Ctrl+U	Biomed Equipment (TMA Client/Server)
Ctrl+Y	Entity Records
Ctrl+Shift+A	On-Hand Adjustment Records
Ctrl+Shift+B	Request Browser
Ctrl+Shift+C	Tools Records
Ctrl+Shift+D	Departments Records
Ctrl+Shift+E	Buildings Records
Ctrl+Shift+F	Quick Post – Labor by Technician
Ctrl+Shift+G	Generate PMs
Ctrl+Shift+H	Hazardous Materials Records
Ctrl+Shift+I	Receivings
Ctrl+Shift+J	Checks & Conditions Records
Ctrl+Shift+K	Contracts
Ctrl+Shift+M	Quick Post - Material
Ctrl+Shift+N	Manufacturers
Ctrl+Shift+O	Quick Post - Other
Ctrl+Shift+P	Projects Records
Ctrl+Shift+Q	Scheduler
Ctrl+Shift+R	Report Manager
Ctrl+Shift+S	Materials Browse
Ctrl+Shift+T	Quick Post - Time & Labor
Ctrl+Shift+U	Request Batch Validation
Ctrl+Shift+V	Time & Attendance
Ctrl+Shift+W	Warehouse or Stockroom
Ctrl+Shift+X	Vendors
Ctrl+Shift+Y	Refrigerants Records
Ctrl+Shift+Z	Vehicles Records

Glossary of Terms

Add mode

when the *Add* button on the TMA toolbar is clicked to create a new record in the TMA software, the software is said to be in Add mode. From the time the *Add* button is clicked until the *OK* button is clicked to save, the record is in *Add* mode.

Area

part of the location hierarchy nomenclature from TMA. The *Area* is the third and lowest hierarchy level, and work orders are written on this level.

Browse

a way to display a list of the records in a table format. Double-click a line in the browse table, and the software will open that record on the *Identity* Tab.

Building

the second level of the location hierarchy.

Check box

a square toggle field. Click to select (place a mark in the box), or click to deselect (clear).

Command+click

a technique used for selecting nonadjacent files for a Macintosh computer. Press and hold the Command ( ) key and click random lines to select (or deselect) lines.

Ctrl+click

a technique used for selecting non-adjacent files in MS Windows. Press and hold the Ctrl key and click random lines to select (or deselect) lines. A similar technique is Shift+click to select adjacent files.

Deselect

a term meaning to clear a choice, frequently in check boxes or radio buttons. Check boxes and radio buttons operate on a toggle principle: click to select, and click once more to clear.

Disabled

when part or all of the display on a window is disabled, the print is light gray and does not respond when clicked. See Enabled.

Drag-and-drop

a standard procedure where text or a line item is selected. You place the cursor somewhere on the selection, and then you press and hold down the left mouse button. While continuing to hold the mouse button, move the cursor (drag) to a different location. When the mouse button is released, the selection is "dropped" in the new location. Frequently, the mouse displays as the universal stop symbol ⃠ until the correct destination is reached. This indicates that no action will be taken unless you 'drop' on the correct area of the window.

Down arrow

the button marked with a downward pointing arrow at the end of a field. When you click this button, it opens a selection window from which to choose data to add to the field.

Edit mode

when the *Edit* button on the TMA toolbar is clicked, the record on display is said to be in Edit mode. In this mode, changes to a record can be made and saved. You remain in Edit mode until the changes are saved (click *OK* on the TMA toolbar) or cancelled (click *Cancel* on the TMA toolbar).

Enabled

menu items and some buttons on a window can be enabled or disabled. When enabled, the print is dark and easily seen. This indicates that the menu option or function can be selected. When disabled, the print is light gray and does not respond when clicked.

Enter key

the key that is labeled "Enter" on most keyboards. It is also marked with an arrow ↵ that points left.

Enterprise

the most robust version of TMA software. It is used with Oracle and SQL databases.

Facility

the highest level of the TMA location hierarchy.

Field

an element of the TMA window used to store default settings from the software program or information entered by users. The type of information required for the field is identified by the field name. Field information can be numbers, text, time, date, Y/N, or name.

Indexed fields

refers to key identifiers in the data tables. Indexed fields can be recognized because the mouse pointer changes to an 'I' beam when positioned over an indexed field.

Keyboard shortcuts

a keyboard equivalent for most menu options so you can avoid using the mouse. Shortcuts consist of a combination of two or three keys pressed at the same time (usually the Control key plus others). For example, Ctrl+M opens the *Work Order* window, Ctrl+Shift+W opens the *Warehouse* window.

Location hierarchy

the area-based levels that are part of the core structure of TMA. The default levels, starting at the top, are Facility, Building and Area.

Location ID

a combination of a building code and an area number used throughout TMA to identify a space.

Path

a term used to describe the location of a file. Starting with the drive designation (C:, D:, etc.), the Path shows each directory (folder) and subdirectory separated by a backslash (\) and the name of the file. Example: C:\My Documents\Files\letter.doc

PM

an acronym meaning planned or preventive maintenance. Many items are scheduled for planned maintenance to avoid breakdowns at inconvenient times.

Populate a field

a term that indicates information is added to a field either manually or automatically.

Radio button

round toggle option buttons. A mark within the button indicates it is selected. Only one in a group of radio buttons can be selected.

Record

a record is a collection of fields stored in the database.

Repair Center

the group/work center responsible for the maintenance of areas, equipment, assets and other items within TMA. Assigning a repair center allows TMA to segregate data by areas of responsibility. TMA users cannot view items linked to a repair center other than their own without Dispatcher or System Administrator access.

Request date

the date the work request was submitted or a work order was created.

Required fields

one or more fields on a window that must be completed in *Add* mode to create a valid record in the table. These show the minimum amount of information needed to create a record.

Scheduled date

the date a work order is assigned to a technician.

Selection window

a smaller window that is superimposed on the current window. Typically these windows pop up when a down arrow is clicked. Use these windows to refine the search criteria to find the data you want to add to a field.

Shift+click

similar to Ctrl+click except the lines selected are adjacent. For example, to select an entire list, click the first line item, press the shift key, and click the last line item to select all lines in between.

Subtab pane

the panes associated with folder-style Tabs at the bottom of a window that display additional information. As each Subtab is clicked, you can review the information on the Subtab panes.

Subtab strip

a series of folder-style Tabs at the bottom of a window that display additional information. These operate like the Tabs at the top of the window. Click each Subtab to review the information on the Subtab panes.

Tab Key

the Tab Key on the keyboard. This is the recommended navigation tool used to move from one field to the next in TMA.

Tab out

this term indicates that you press the Tab Key on the keyboard to move out of one field and into another. Using the Tab Key for cursor movement is the preferred navigation method when using TMA software.

Tab

a window within a function that is identified by a folder-style Tab along the top of a window. The interface for each Tab can be viewed by clicking the labeled Tab.

User

in the TMA manuals, the term user refers to the person logged in to the TMA software.

View mode

when a saved record is displayed in the window, the record is in *View* mode. You can see the contents but cannot make changes to the record.

WorkGroup

a version of TMA with more features than TMA eXpress but fewer than TMA Enterprise.

Zoom

this term refers to a convenient right-click method of opening a related record. When you zoom to a record, the current window closes, and the related window opens. Typically, you can zoom back to the original record.

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