

Safety Dance: Should You Use General Inspections or Master Checks?



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About Me: Seasoned Senior Consultant with 16 years of experience at TMA Systems focusing on WebTMA implementation and optimizing workflows.





Agenda

1. What is a Master Check?
2. Benefits of using Master Checks?
3. What is a General Inspection?
4. Benefits of using General Inspections?
5. Live Demo



Hands Up! Polling Question

How many in the audience use checklists?

- Electronic
- Paper



What are some of the features of Master Checks?

1

Included in WebTMA Base

Master Checks are available to all clients using WebTMA.

Organization-Tasks-Master Checks

2

Allows Pass/Fail/Input

Flexible settings to allow for pass/fail, input in WebTMA from the work order form and on MobileTMA Go and WebTMA Go

3

Automatically Create Work Order

Can automatically create a corrective work order on failure



What are some of the features of General Inspections?

1

Grouping MWI in a Work Order

Allows for multiple equipment inspections with a single work order. You can also assemble different types of items into a single collection regardless of category.

2

Work Order History on Each Item

Create WO history on each item in the Inspection. This is useful for regulatory agencies that will not accept WO history at the group level

3

Building Routes

Apply a route philosophy to your inspections by assembling inspection items in a logical order. Allows technicians to follow a route using a mobile device.



Hands up! Polling Question

How many in the audience require technician comments to collect information about work performed?



The Challenge of Technician Comments

- Technician comments are used to gather information about general work completed, inspections and failures
- From a data analyst's view, comments are the most difficult to report on or analyze
- Typically, there is no consistency in comments
- We can require technician comments on a form, but we can't control their responses
- How do we gain consistency, control responses and allow for reportable data?



The Answer is Master Checks or General Inspections

- Control the specific details/checks you want the technician to perform
- Create a Pass/Fail structure to create a record of failures
- Automatically create a corrective work order on failures
- Convert spreadsheets and paper forms to electronic data capturing tools
- Provide a standardized reportable structure for data analysis
- Move your paper forms to mobile



Why use Master Checks?

- Move from paper forms to an electronic format
- Included in base module (no extra cost involved)
- Take your PM task sheet from a read only document to an interactive form
- Simple and quick setup and launch (get started sooner)
- Works well for 1:1 PMs or rounds
- Can automatically create a corrective work order on failure
- Available on MobileTMA Go and WebTMA Go
- In development on the new mobile app 'WebTMA'



Hands up! Polling Question

How many in the audience use Groups in WebTMA to reduce work order volume?

- Example: All 10 fire extinguishers on a building are grouped to create one PM instead of 10 (1 work order per item).



The Challenge of Grouping Work Orders

- Eliminating hundreds of PM Work Orders by grouping items is AWESOME!
- It saves time, scheduling, printing and less WOs for technicians to close
- However, there is a challenge with grouping
 - What do you do when you need to fail a specific item in the group?
 - Master checks only provide 1 response for the entire work order.
- How do you group items, reduce work order volume, have specific questions for each item AND fail the specific items as needed?



The Answer is General Inspections

- Allows you to eliminate multiple PM Work Orders by grouping items
- It saves time, scheduling, printing and less WOs for technicians to close
- Allows for different questions/checks for each item in the group on one work order
- Allows for multiple failures within one work order
- Failed items will create a work order on the specific item that failed
- Can be configured to automatically create an inspection work order using the Equipment Make/Model function
- ** Module is not available in the base product and must be purchased



They Sound So Similar, Which Should You Use?

- Master Checks do perform similarly to General Inspections, but they have limitations.
- Master Checks are great for capturing data and failures on a single item on a single work order.
- Master Checks are very simple to implement and get started right away.
- Master Checks DO NOT require a module purchase. It is part of your system today.
- General Inspections do perform all the same functions as Master Checks, but they have more capabilities.
- General Inspections allow you to build an inspection form with separate questions/responses for individual items on the form
- *General Inspections allow you to fail specific items in a group*
- General Inspections works with Equipment Make/Model data to create inspections for new equipment when fully configured



Can You Use Both Master Checks and General Inspections?

- Absolutely!
- Many clients use Master Checks for simple tasks that need to be performed and General Inspections for more complex data collection.



In Summary...

Master Checks

1

Have a paper checklist that you want techs to fill out electronically

2

Do not need to group MWI's to save on work order volume

3

Want a simple and quick setup

4

Want a work order to be created on a failure

General Inspections

1

Have an inspection or detailed route that you need item specific checks/results

2

Need to create a route on various locations and/or equipment within one work order

3

Multiple Repair Center support for different form/questions using the same task

4

Want a work order to be created on a failure for the specific item in a group



Let's See How It All Works!



Master Checks in MobileTMA Go

Cancel ☒ Work Order ☒ Save

Search Text

ID	Gen01	✓
Desc	Check battery voltage	
Seq	1	
P/F	Not Checked	
Value		
ID	Gen02	✓
Desc	Record Fuel Level in gallons	
Seq	1	
P/F	Not Checked	
Value		
ID	Gen03	✓
Desc	How many seconds to close the bus in seconds	
Seq	1	
P/F	Not Checked	
Value		
ID	Gen04	✓
Desc	Run Time in hours at the start of test	
Seq	1	
P/F	Not Checked	
Value		
ID	Gen05	✓

6 Records

Configure

Identity Task Check List Required Parts More

Cancel ☒ Check List ☒ Save

Description

Check battery voltage

Value

13.6v

Pass / Fail

Not Checked

Date

Previous Next Scan Done

"6v"

q w e r t y u i o p

a s d f g h j k l

↑ z x c v b n m ↵

123 ⌨️ space return

Cancel ☒ Check List ☒ Save

Description

Check battery voltage

Value

13.6v

Pass / Fail

Not Checked

Date

Apr 3, 2025

Comment

Voltage is within specification



Master Checks in a WebTMA Work Order

Check Results

SaveClose

Check Result Search Criteria

WO #*FAC-12046

Technician Code*ML

Date

Technician Name*Michael Lee

Enter Check ResultsView Results Only

Check Results

Task Code	Task Description	Seque...	Check Code	Check Descript...	Check Type	Pass / Fail	Corrective WO #	Value	Date	Comment
PM-Generator	Monthly Generator PM	1	Gen01	Check battery voltage	Master			13.6v	04/02/2025	Voltage is within specificatio
PM-Generator	Monthly Generator PM	1	Gen02	Record Fuel Level in gallons	Master				2025-04-03	
PM-Generator	Monthly Generator PM	1	Gen03	How many seconds to close the bus in seconds	Master				2025-04-03	
PM-Generator	Monthly Generator PM	1	Gen04	Run Time in hours at the start of test	Master				2025-04-03	
PM-Generator	Monthly Generator PM	1	Gen05	Run Time in hours at the end of test	Master				2025-04-03	
PM-Generator	Monthly Generator PM	1	Gen06	Is the Generator free of leaks and debris.	Master	<input type="radio"/> Pass <input checked="" type="radio"/> Fail <input type="radio"/> Not Checked	FAC-12463			

1 - 6 of 6 items

SaveClose



General Inspections on MobileTMA Go

Work Order

Search Text

Advanced Options

Type	Planned Maintenance
Tag #	
Desc	
Action	fix
Status	Unassigned
WO #	FAC-12035
Req	Nov 7, 2024 02:13 PM
Loc ID	
Bldg	Building A
Priority	Routine
Type	Planned Maintenance
Tag #	INS-123_FireExt
Desc	INS-Building A Fire Ext Check
Action	Fire Extinguisher Check
Status	Re-opened
WO #	FAC-12036
Req	Nov 7, 2024 02:51 PM
Loc ID	
Bldg	Building A
Priority	Urgent
Type	Planned Maintenance
Tag #	123EG01-01
Desc	Building A Generator #1-12
Action	Monthly Generator PM
Status	Unassigned
WO #	BIO-12109

28 Records

Cancel General Inspections Save

FAC-12035

Search Text

First Floor

123FE01-01: Fire Ext in Rm 101 (123-101)

Check # 1 Corrective Work Order # ✓

Is the Fire Extinguisher in the designated place?

Compliant... > NA

Check # 1 Corrective Work Order # ✓

Is the Fire Extinguisher easily accesible?

Compliant... > ✓ NA

Check # 1 Corrective Work Order #

Is the Fire Extinguisher visible and/or is there signage in place?

Compliant... > NA

Identity Checks

< General Inspections Cancel

Compliant/Fail


Fail

Compliant



General Inspections in a WebTMA Work Order

✕ Inspection

Work Order # P-278061 

Checklist

Tag #

Steam Plant FW Pumps

🕒

PBRFWP-2 - Boiler Feed Water Pump #2 (Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR)

✔

PBRFWP-3 - Boiler Feed Water Pump #3 (Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR)

PBRFWP-4 - Boiler Feed Water Pump #4 (Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR)

PBRFWP-5 - Boiler Feed Water Pump #5 (Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR)

Boiler 3 ID Fans

✕ Item Check List

Save Close

Tag # PBRFWP-4
Location Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR

Hide Finished Checks ☐
Pass All ☐

<input type="checkbox"/>	#	Check	N/A	Value	Pass/Fail	Corrective WO	Comments
<input type="checkbox"/>	1	P-Visually check oil level on Feed Water Pump Bearings (If oil level is below the recommended level for operation, this fails the portion of the inspection). Input level reading of sight glass.	<input type="checkbox"/>	<input type="text"/>	○ ○		<input type="text"/>
<input type="checkbox"/>	7	P-Visually check oil level on FW Pump Governors (If oil level is below the recommended level for operation, this fails the portion of the inspection). Input level reading of sight glass.	<input type="checkbox"/>	<input type="text"/>	○ ○		<input type="text"/>



General Inspections in WebTMA Go

3:56 PM Fri Apr 4

Main Menu

Work Order

Status ✓ Save Cancel

Work Order # FAC-13034

Task Type Life Safety

Task PM-FireExt

Description Fire Extinguisher Check

Trade MEP

Failure

Completion Date

Due Date

Finish Date

Close Sched

Finish Task

Close Task

Work Not Done

Failed PM

Not Located

Labor Start Timer General Inspection

Identity Task Task Sheet Required Parts List More



General Inspections in WebTMA Go

3:56 PM Fri Apr 4

Main Menu General Inspection Status ✓ Save Cancel

Search Search Text < >

First Floor
123FE01-01: Fire Ext in Rm 101 (123-101)

Check #	Description	Result	Global Comment
1	Is the Fire Extinguisher in the designated place?	<div>Compliant/Fail</div> <div><input type="radio"/> N/A</div>	
1	Is the Fire Extinguisher visible and/or is there signage in place?	<div>Compliant/Fail</div> <div><input type="radio"/> N/A</div>	
1	Is the Fire Extinguisher easily accesible?	<div>Compliant/Fail</div> <div><input type="radio"/> N/A</div>	

Global Comment

Inspected By > Checked Out To >

Date/Time > Check Out Date >

Completion Date > Finish Date >

☐ Work Not Done Status >

Check Out Refresh Start Timer Pass All

Inspection WO # FAC-13034



General Inspections in WebTMA Go

4:00 PM Fri Apr 4 ... 83%

[Main Menu](#) **Corrective Work Order** [Status](#) [Save](#) [Cancel](#)

Area	123-101	...	Office Rm 101
Equipment	123FE01-01	...	Fire Ext in Rm 101
Repair Center	FAC	>	Facilities

Request Date	Apr 4, 2025 03:58 PM	>	WO Type	Move/Modify	>
Finish Date		>	WO Subtype		>
Completion Date		>	Status		>
			Status Notes		

Task	20005	>	Fire Extinguisher	
Priority	ROUTINE	>	Routine	
Trade Desc	Mechanical	>		
Technician		>	Shift	

Assigned To Self ☐

Request
Extinguisher wall mount broken

Tech Comments



General Inspections in WebTMA Go

4:01 PM Fri Apr 4 82%

[Main Menu](#) **General Inspection** Status ↻ Save Cancel

Search < >

First Floor
123FE01-01: Fire Ext in Rm 101 (123-101)

Check #	Description	Result	Global Comment
1	Is the Fire Extinguisher in the designated place?	<div>Fail</div> <div>FAC-13035</div>	
1	Is the Fire Extinguisher visible and/or is there signage in place?	<div>Compliant/Fail ></div> <div><input type="checkbox"/> N/A</div>	
1	Is the Fire Extinguisher easily accesible?	<div>Compliant/Fail ></div> <div><input type="checkbox"/> N/A</div>	

Global Comment

Inspected By

Mobile, UC25 >

 Checked Out To

UC25 Mobile

Date/Time

>

 Check Out Date

Apr 4, 2025 03:57 PM

Completion Date Finish Date

☐ Work Not Done Status

>

Check In Refresh Start Timer Pass All

 Inspection WO #

FAC-13034



Thank You / Q&A

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25 YEARS
OF COMMUNITY, PARTNERSHIP, AND GROWTH