

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





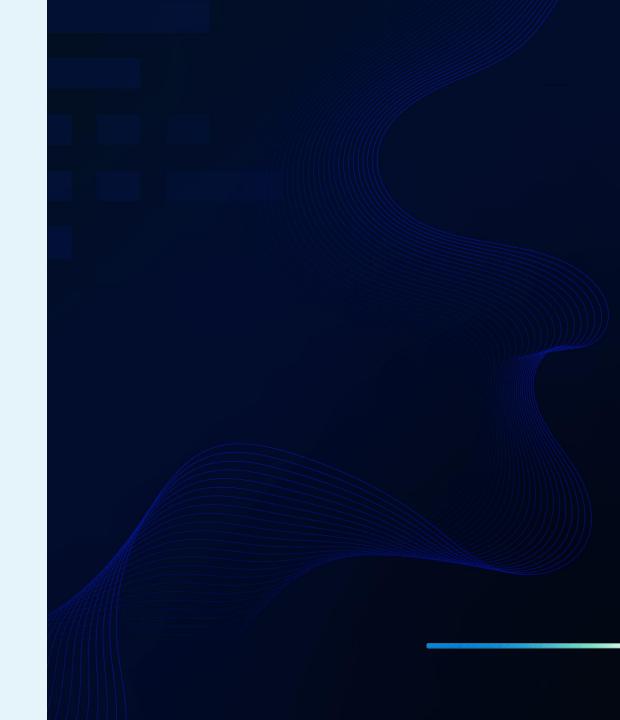
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About Me: Seasoned Senior Consultant with 16 years of experience at TMA Systems focusing on WebTMA implementation and optimizing workflows.



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



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What are some of the features of Master Checks?



Included in WebTMA Base

Master Checks are available to all clients using WebTMA.

Organization-Tasks-Master Checks



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



Automatically Create Work Order

Can automatically create a corrective work order on failure



What are some of the features of General Inspections?







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.

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

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
 - o What do you do when you need to fail a specific item in the group?
 - o 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

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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

- Have a paper checklist that you want techs to fill out electronically
- Do not need to group MWI's to save on work order volume
- 3 Want a simple and quick setup
- Want a work order to be created on a failure

General Inspections

- Have an inspection or detailed route that you need item specific checks/results
- Need to create a route on various locations and/or equipment within one work order
- Multiple Repair Center support for different form/questions using the same task
- Want a work order to be created on a failure for the specific item in a group

Let's See How It All Works!





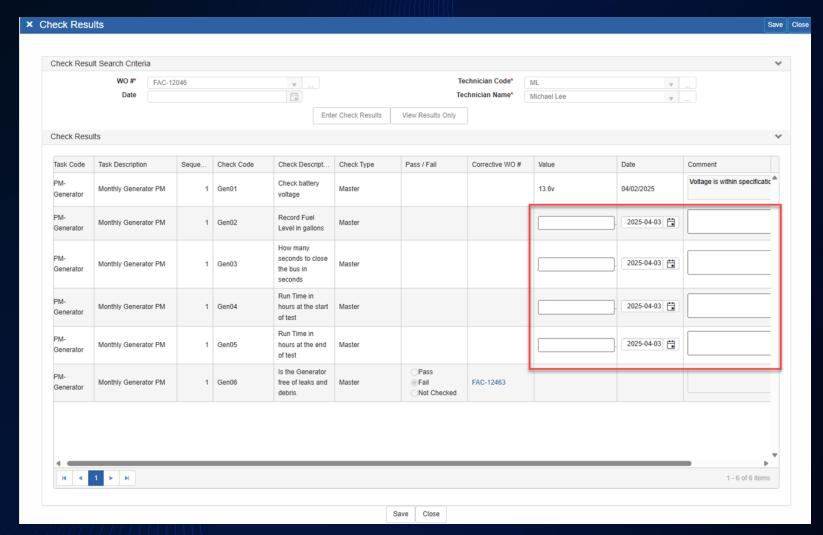
Master Checks in MobileTMA Go



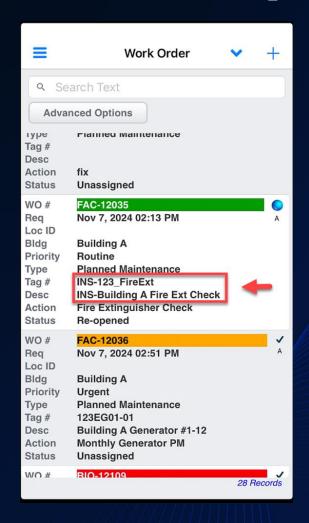




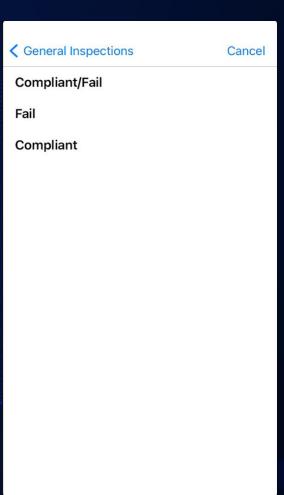
Master Checks in a WebTMA Work Order



General Inspections on MobileTMA Go



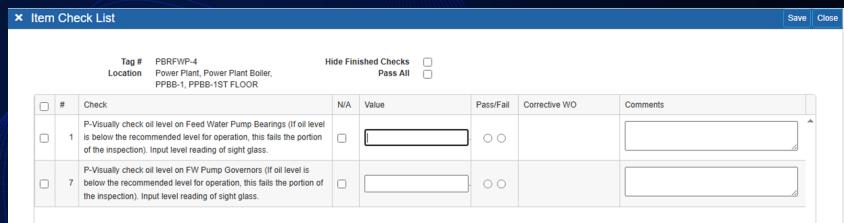






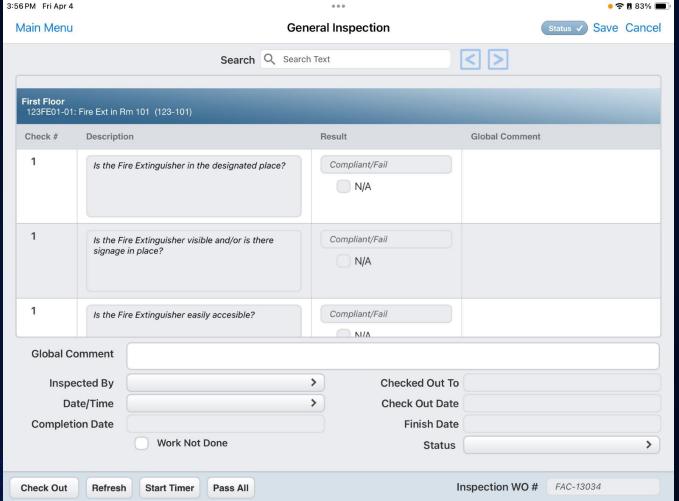
General Inspections in a WebTMA Work Order

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)	
▲ Roiler 3 ID Fans	





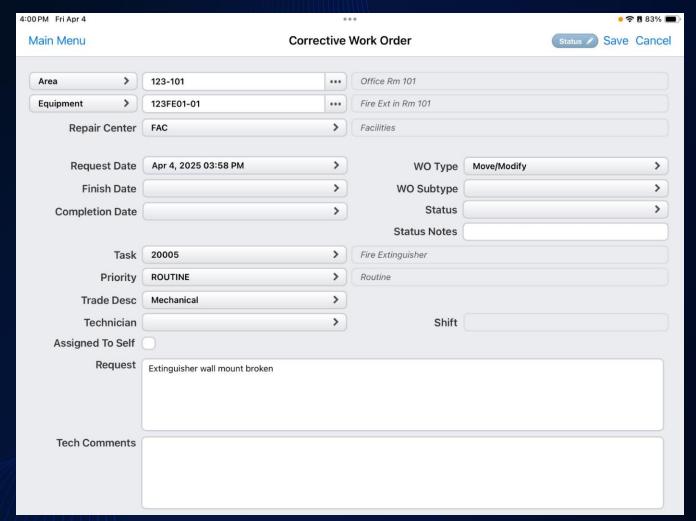
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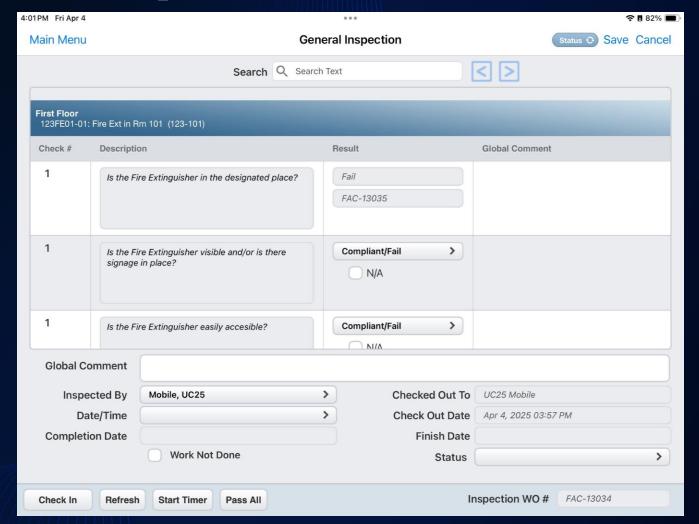




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Thank You / Q&A

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