

# What's New in WebTMA 7



HARD ROCK  
CASINO & HOTELS

TULSA | MAR 30 – APR 02



# Introductions



**JOE MCVAY** | Senior Director of Solutions Engineering

*joe.mcvay@tmasystems.com*

Joe McVay has served in various roles at TMA Systems including Senior Implementation Consultant, Product Manager, and is now the Director of Solutions Engineering. Joe has over 14 years of experience in CMMS and EAM applications spanning verticals such as Higher Education, Healthcare, Public Sector, and Manufacturing.

Joe is responsible for leading technical demonstrations of our product offerings and assisting our Engineering department with new development initiatives.



# Agenda

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# Development Approach



# Product Roadmap Vision

Our roadmap reflects what we've been hearing from our customers:

01

## Intuitive by design

Work gets done faster when systems are clear. We focus building features with simplicity, fewer clicks, and experiences that feel natural for the people using them every day.

02

## Built with our customers

Our most valued asset is the voice of the customer. Customer insight drives our roadmap. Feedback isn't collected; it's operationalized into continuous improvement.

03

## Spatial data and better analytics

From floorplans to GIS, spatial data becomes actionable. See where work is happening, how assets connect, and what's impacting your spaces — in context.

04

## Flexible & scalable

Open APIs and modern integrations support complex environments without forcing consolidation or compromise.

05

## Intelligence that improves decision-making

Embedded AI reduces noise and surfaces risk. It delivers clearer decisions and strengthens prioritization without adding complexity.



# Voice of the Customer

## WebTMA Enhancement Program Based on Client Requests

- TMA Systems launched a monthly program to prioritize "quick-win" client suggested enhancements in July 2024. Currently, TMA selects a minimum of one client enhancement each month to be developed. Latest VOC enhancements:
  - November 2025 – **University of Northern Colorado** – Adds a direct link in all the Request Log browse areas to view documents attached to each Request Record, enabling faster review of relevant requests and attachments when accepting or rejecting requests.
  - November 2025 – **Election for Direction Submission** – WebTMA + Workday Financial Integration syncs maintenance updates and financial information. Creating a single, accurate source of truth for labor, cost, and asset data allows for better planning and operational visibility.
  - December 2025 – **University of New Mexico Health System** – Introduced the ability to mark queries as favorites and quickly access them from a dedicated list, opening the selected query in a new UI window for faster access to frequently needed information.
  - January 2026 – **Election for Direction Submission** – Enables users to email a designated inbound address to automatically create a request record, with optional AI-assisted field population based on the email's context.

Client enhancement requests can be submitted via support ([support@tmasystems.com](mailto:support@tmasystems.com)), in the [WebTMA User Forum](#), or through your Account Manager.





# 01. Which of the following have you used or explored? (Select all that apply)

- a. WebTMA Mobile app
- b. AI features (e.g., email automation, SmartScheduler, Otto)
- c. ContractorHub
- d. Embedded Analytics
- e. None of the above

# Major Releases Last Year

# New Mobile Added Features

## WHAT'S NEW

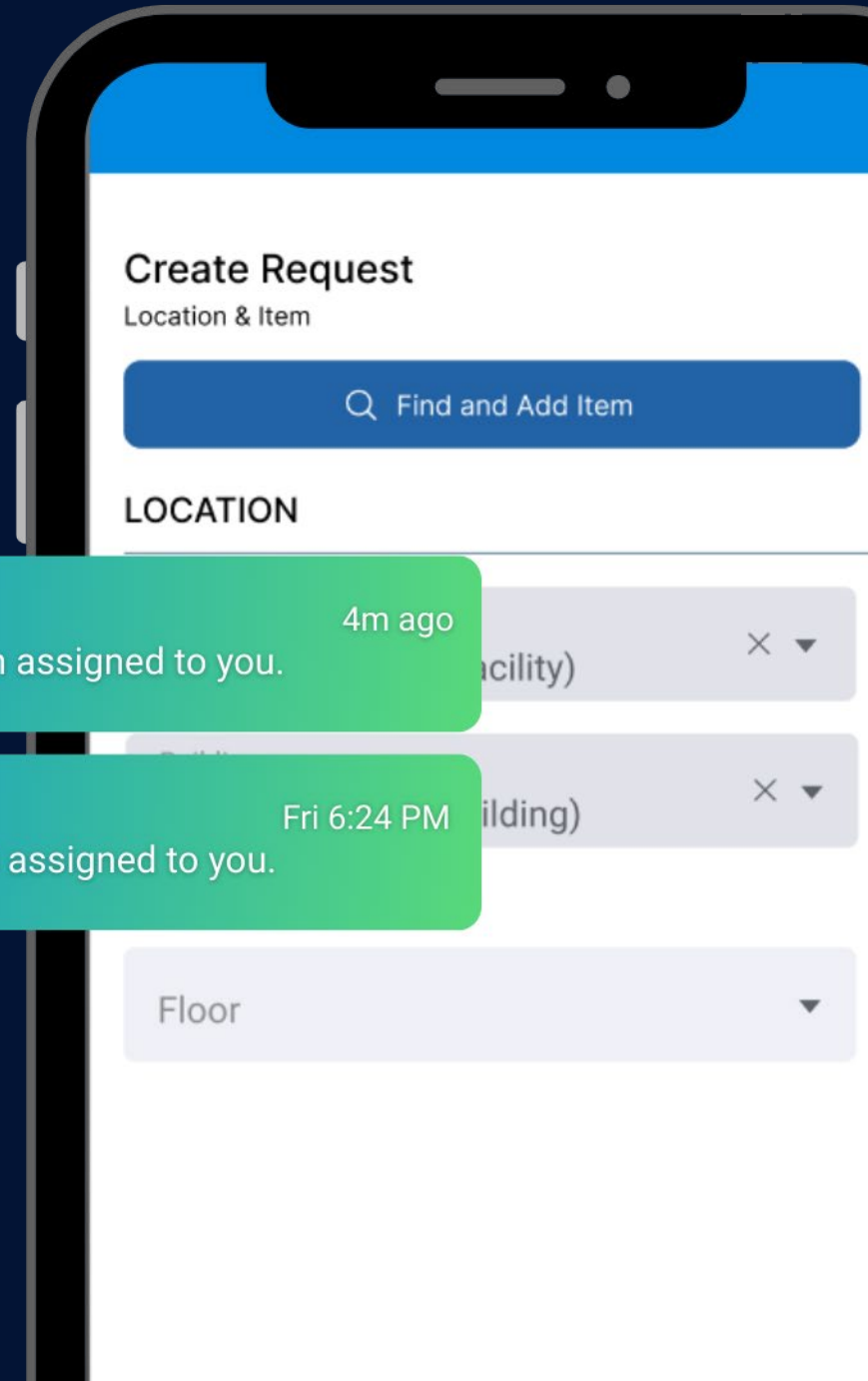
- **Real-time push notifications** keep technicians informed of new and scheduled work
- **Capture failure codes** directly in the field to trigger corrective workflows.
- **Create work requests** directly from the new mobile app to follow preferred intake processes.

## WHAT IT SOLVES

Keeps technicians connected and responsive in the field. Reduces missed assignments, improves data capture at the source, and accelerates the flow from request to resolution.



*\*Mobile licensing for older versions carries over to new mobile. Users can continue to use old and new mobile versions if they so choose.*

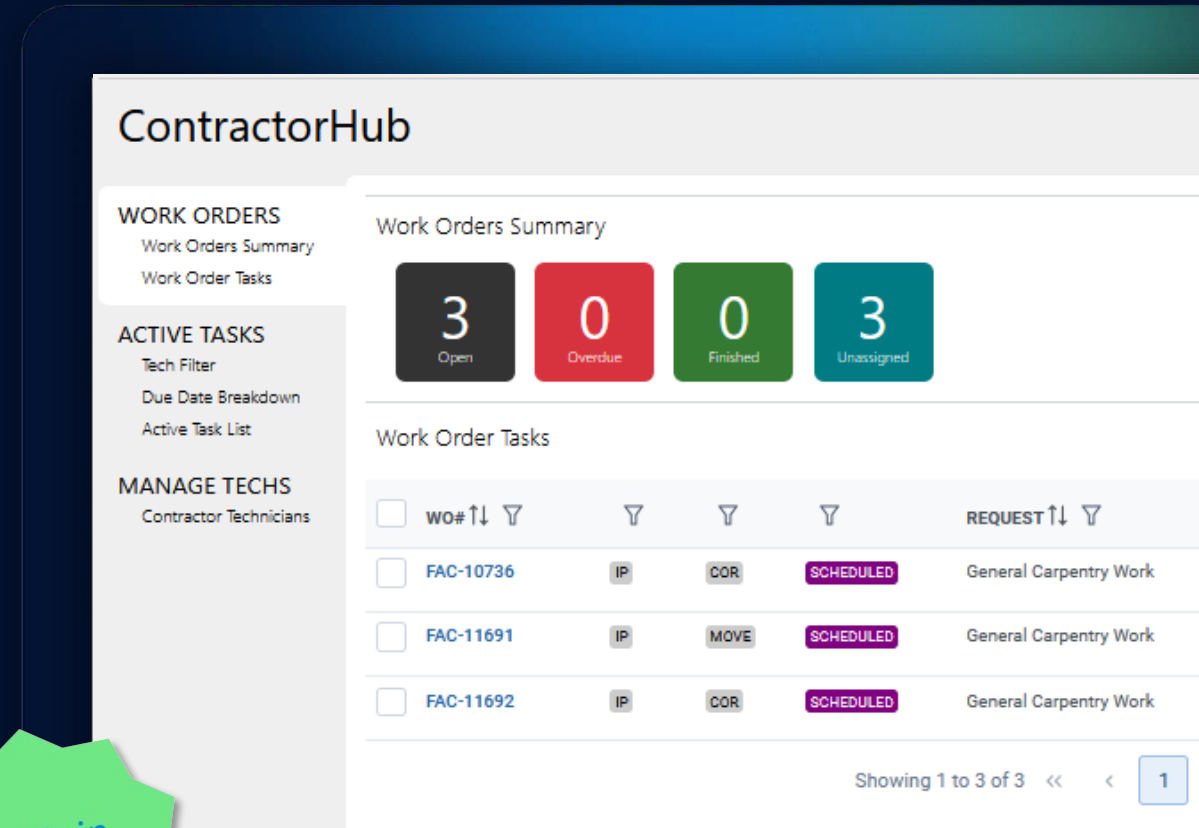




# ContractorHub

## WHAT'S NEW

- Admins create Contractor Manager accounts and manage technician access
- Contractors securely access assigned work orders via tokenized login
- Technicians view details, update status, log time, and enter invoices
- Built-in templates streamline contractor communication



## WHAT IT SOLVES

Extends WebTMA to contractors without sacrificing control. Improves visibility into outsourced work, strengthens accountability, and reduces manual coordination between internal teams and external vendors.





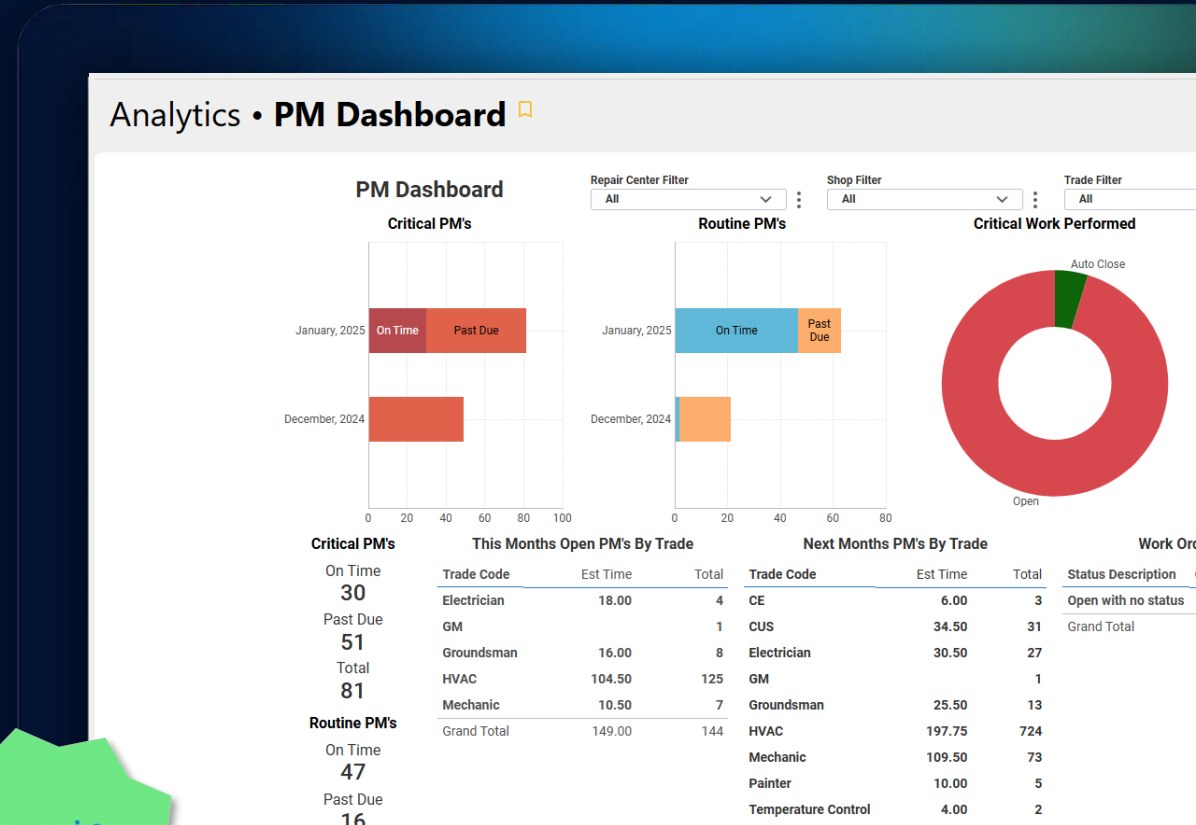
# Embedded Analytics

## WHAT'S NEW

- Pre-built, best-practice KPI dashboards embedded directly in WebTMA
- Real-time data visualization with multi-level drill-down
- Filters and specialized views across work orders, assets, PM, financials, and capital planning
- No separate BI tools or configuration required

## WHAT IT SOLVES

Transforms operational data into actionable insight. Reduces reliance on static reports, improves visibility across performance metrics, and enables faster, more informed decisions — without exporting data or adding tools.





# 02. Where do you see the biggest opportunity to improve your operations today?

- a. Technician efficiency in the field (mobile)
- b. Reducing manual work and admin (AI)
- c. Managing contractors / vendors more effectively (ContractorHub)
- d. Improving visibility and reporting

# Features You May Have Missed



# See the Release Notes?

- PM Task Sheets – Rich Text
- PM Recurrence Rules
- Mass Import – Additional Mappings
- Browse Query Enhancements – Update Owner
- Linked Documents Hyperlinks in Query Results

The screenshot displays a software interface for a PM Task Sheet. The window title is "PM Task Sheet" with a "Close" button. The main content is a checklist titled "Annual Boiler Preventive Maintenance Checklist". The checklist is organized into four numbered sections: 1. Safety & Preparation, 2. Boiler Exterior Inspection, 3. Combustion & Burner Assembly, and 4. Pressure Vessel & Internal Inspection. Each section contains a list of specific tasks to be performed. In the background, a blurred view of a query results table is visible, showing columns for Order #, Request Date, Request Center, Description, Subtype, Description, Agent Name, Account #, Charge, Start Date, End Date, Due Date, Rule Code, Operator Code, Operator Name, Contract #, and Requested Date. A red "Not Scheduled" status is visible in the background.

**PM Task Sheet** [Close]

**Annual Boiler Preventive Maintenance Checklist**

- 1. Safety & Preparation**
  - Verify lockout/tagout (LOTO) is in place before starting work.
  - Review last year's PM reports, service history, and any logged issues.
  - Allow boiler to cool and fully depressurize.
  - Drain and isolate boiler as needed for internal inspection.
  - Check all safety signage and operating procedures are visible and legible.
- 2. Boiler Exterior Inspection**
  - Inspect insulation and lagging for damage or deterioration.
  - Check for leaks around flanges, fittings, and seams.
  - Clean exterior surfaces and remove dust, soot, and oil residue.
  - Inspect burner mounting, refractory, and sight glass assembly.
- 3. Combustion & Burner Assembly**
  - Remove and clean burner components (nozzles, diffusers, electrodes, sensors).
  - Inspect and clean pilot assembly and igniter.
  - Verify proper operation of flame safeguard controls.
  - Check air/fuel ratio settings and adjust as required.
  - Perform combustion efficiency test (O<sub>2</sub>, CO, CO<sub>2</sub>, stack temperature).
  - Inspect combustion air openings for obstructions.
- 4. Pressure Vessel & Internal Inspection**
  - Open handholes and manholes for internal inspection.
  - Inspect for corrosion, scaling, or pitting.
  - Examine tubes for signs of overheating, deposits, or cracking.
  - Clean waterside surfaces using approved methods (chemical or

# Feature Demo

# Major Releases



# WebTMA Mobile

## SHOW/HIDE & REQUIRED/OPTIONAL FIELDS

Let administrators show or hide fields and set them as required or optional. This ensures the mobile experience aligns with business needs and enforces the right level of data entry.

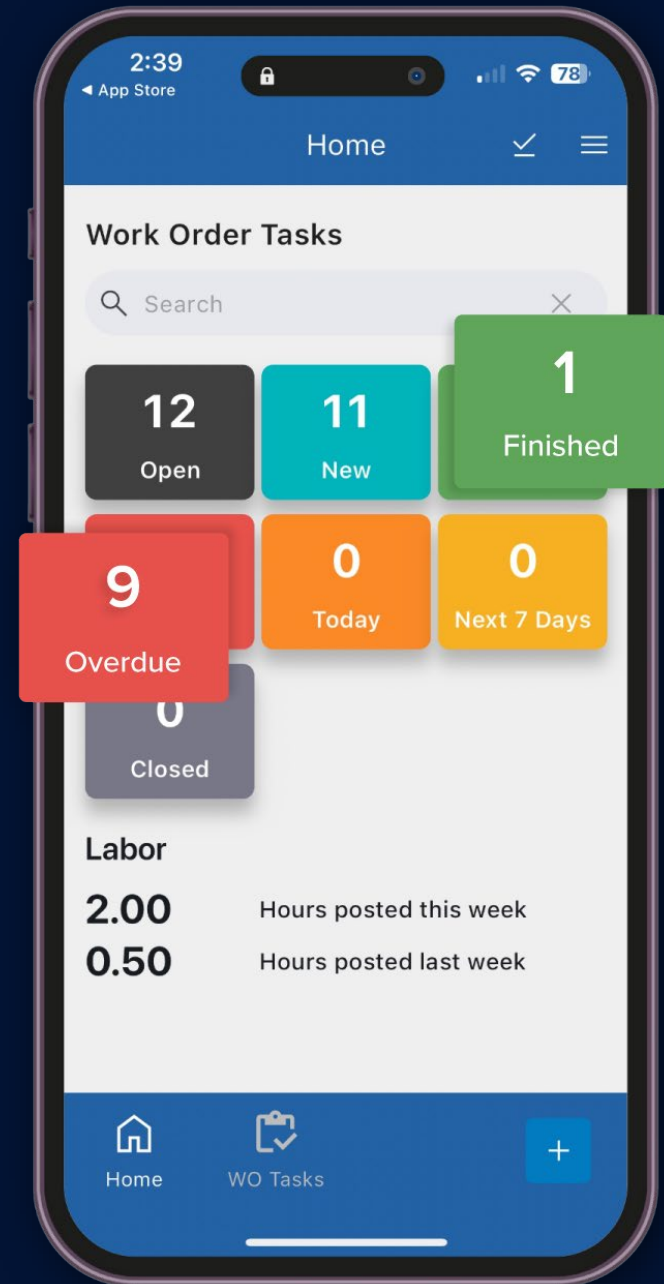
## TILE LAYOUT AND QUERIES

Allow admins to assign custom queries to tiles and enable assign functions if needed.

## MATERIAL AND ONE TIME PURCHASE (OTP) REQUESTS

Technicians will be able to request unstocked parts and material in the mobile app.

Expected releases: Q2 2026



# Otto: AI WO Assistant

## HOW IT WORKS

- Ask questions directly within a work order
- Instantly retrieve relevant work order history and asset context
- Surface attached user manuals and documentation
- Summarize trends, comments, costs and past resolutions

## WHAT IT SOLVES

Eliminates time spent searching through records and attachments. Brings historical context to the point of work, accelerates troubleshooting, and helps technicians resolve issues faster with clearer insight.

**Expected Release: Q2 2026**





# Interactive Floorplans

## HOW IT WORKS

- Upload and interact with digital floorplans inside WebTMA
- View and manage work orders directly within mapped spaces
- Access equipment details and complete updates from the visual editor
- Display department overlays to understand space impact

## WHAT IT SOLVES

Connects work to physical space. Improves visibility into where issues occur, reduces time spent navigating records, and helps teams prioritize work based on real spatial context.

***Expected Release: Q2 2026***



# New UI: Work Orders

## HOW IT WORKS

- Redesigned work order page in the new UI
- Role-based permissions for edit and read-only access
- Structured fields with smart dependencies
- Collapsible User Defined Fields (UDFs)

## WHAT IT SOLVES

Creates a clearer, more consistent Work Order experience. Reduces field confusion, improves data accuracy, and aligns user actions with permissions and workflow needs



Expected Release: Q2 2026

### Work Order - FM-20726 ☆

**RECORD**

- General Information
- Item: Equipment
- Location
- Requestor Information
- Department
- Task Information
- Task Schedule
- Task Comments

**MORE DETAILS**

- General Comments

#### General Information

ACTION REQUESTED  
**Air Handler appears to be leaking**

REQUEST DATE  
**03/20/2026 04:06 PM**

WORK ORDER TYPE  
**Corrective Maintenance**

STATUS  
**Created**

REFERENCE NUMBER  
—

PRIORITY  
**2 - Urgent - Urgent**

REPAIR CENTER  
**FAC - Facilities**

WORK ORDER SUBTYPE  
—

STATUS NOTE  
—

ADDITIONAL REFERENCE  
—

#### Item: Equipment

TAG NUMBER  
**CHS-AHU-**

CONDITION  
—

#### Location

FACILITY  
**School Dis**

FLOOR  
—

### PLMB-LEAK-PIPE

#### Task Information

TASK  
**PLMB-LEAK-PIPE - Leak - Pipe**

TASK DUE DATE  
**03/25/2026 04:06 PM**

TRADE  
**PLMB - Plumber**

CONTRACTOR  
—

RATE SCHEDULE  
—

CONTRACT #  
—

#### Task Schedule

TECHNICIAN  
**Anthony Coleman**

START DATE  
**03/20/2026 04:11 PM**

SCHEDULE COMMENT  
-

TRADE  
**Admin**

SHIFT  
**First Shift**

DURATION  
**0.25 Hours**

#### Task Comments

No comments





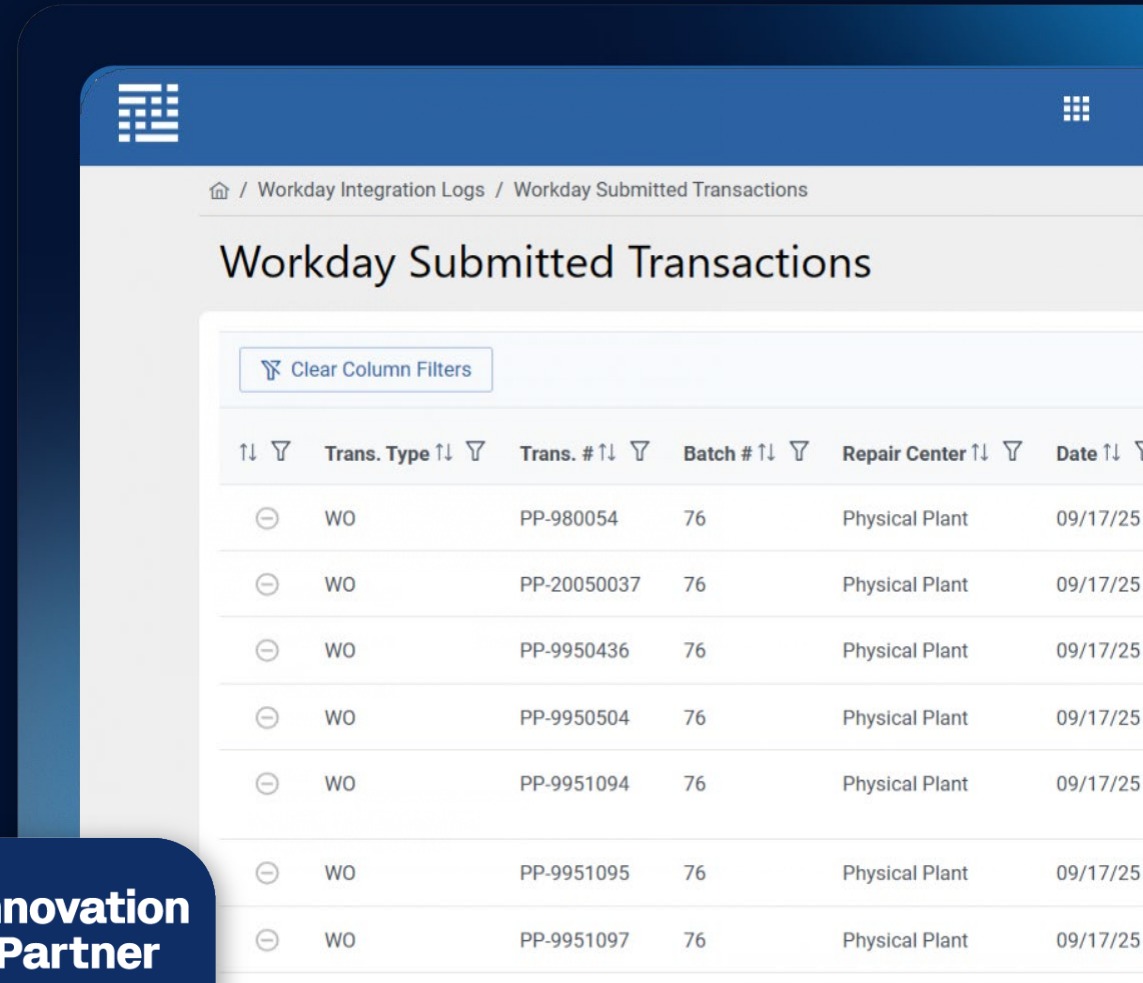
# Workday Connector: Procurement

## HOW IT WORKS

- Turnkey integration with Workday Procurement to WebTMA
- Automatic synchronization of purchase requests, POs, receipts, and invoices
- Real-time integration logs for visibility into system activity and errors

## WHAT IT SOLVES

Prevents duplicate entry, reduces reconciliation errors, and keeps procurement records aligned across systems. Improves visibility into integration performance and accelerates issue resolution.



Expected Release: Q2 2026



# 03. What has been the biggest barrier to adopting new WebTMA features?

- a. Lack of awareness or understanding
- b. Limited time / resources to implement
- c. Change management / user adoption challenges
- d. Unclear value or ROI
- e. Technical or integration concerns



# New Feature Demo



# 04.

Which of these areas are you most interested in exploring further after this session?

- a. Mobile app for technicians
- b. AI-powered automation
- c. ContractorHub
- d. Interactive Floorplan
- e. Workday Integration
- f. Not looking to expand right now

Q&A

Thank you

