

Simplified Inspections in WebTMA



HARD ROCK
CASINO & HOTELS

TULSA | MAR 30 – APR 02



Introductions



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Seasoned professional with over two decades of experience in CMMS and Facilities Management. Throughout his career, he has successfully implemented solutions for prestigious clients, including:

- University of California – Santa Barbara
- University of Alabama – Birmingham
- San Diego State University
- The Department of Energy
- CKS Packaging
- Johnson Controls
- Western Digital



Agenda

What is a Master Check? 1

Benefits of using Master Checks 2

What is a General Inspection? 3

Benefits of using General Inspections 4



01. How are inspections primarily conducted in your organization today?

- a. Paper-based checklists
- b. Digital forms or spreadsheets
- c. Work orders in WebTMA
- d. A mix of methods
- e. Not sure



The Challenge: Technician Comments

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



The Answer: Master Checks or General Inspections

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



What are some of the features of Master Checks?

01

Included in WebTMA Base

Master Checks are available to all clients using WebTMA

02

Allows Pass/Fail Input

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

03

Automatically Create Work Order

Can automatically create a corrective work order on failure



Why use Master Checks?

1. Move from paper forms to an electronic format
2. Included in base module (no extra cost involved)
3. Take your PM task sheet from a read only document to an interactive form
4. Simple and quick setup and launch (get started sooner)
5. Works well for 1:1 PMs or rounds
6. Can automatically create a corrective work order on failure
7. Available on all Mobile Devices



02.

What is the biggest challenge with your current inspection process?

- a. Too many work orders generated
- b. Inconsistent or incomplete data capture
- c. Time-consuming for technicians
- d. Limited visibility / reporting on results
- e. Difficulty standardizing inspections



What are some of the features of General Inspections?

01

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

02

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

03

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.



The Challenge: Grouping Work Orders

1. Eliminating hundreds of PM Work Orders by grouping items is AWESOME!
2. It saves time, scheduling, printing and less WOs for technicians to close
3. 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.
4. How do you group items, reduce work order volume, have specific questions for each item AND fail the specific items as needed?



The Answer: General Inspections

1. Allows you to eliminate multiple PM Work Orders by grouping items
2. It saves time, scheduling, printing and less WOs for technicians to close
3. Allows for different questions/checks for each item in the group on one work order
4. Allows for multiple failures within one work order
5. Failed items will create a work order on the specific item that failed

** Module is not available in the base product and must be purchased



03. How are inspection results typically handled today?

- a. Each inspection generates a work order
- b. Only issues generate work orders
- c. Managed outside of work orders (manual tracking)
- d. A mix of approaches



They sound so similar, which should you use?

1. Master Checks do perform similarly to General Inspections, but they have limitations.
2. Master Checks are great for capturing data and failures on a single item on a single work order.
3. Master Checks are very simple to implement and get started right away.
4. Master Checks DO NOT require a module purchase. It is part of your system today.
5. General Inspections do perform all the same functions as Master Checks, but they have more capabilities.
6. General Inspections allow you to build an inspection form with separate questions/responses for individual items on the form
7. *General Inspections allow you to fail specific items in a group*
8. 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 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



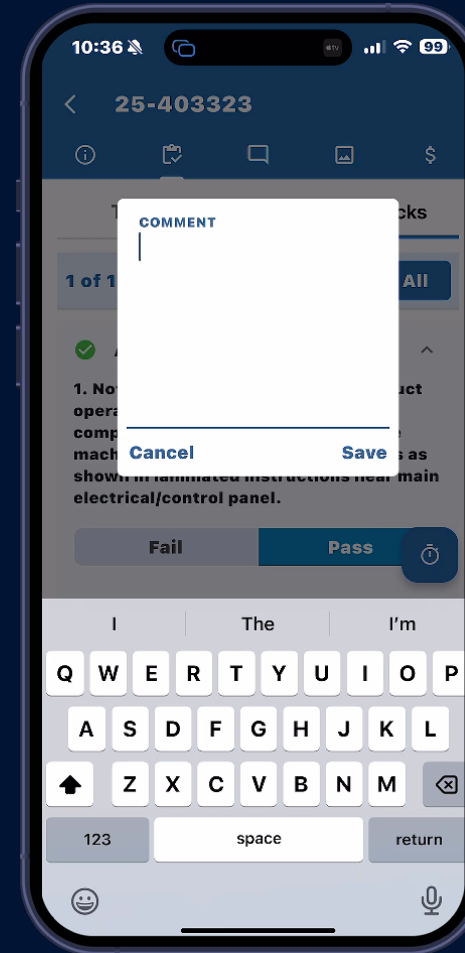
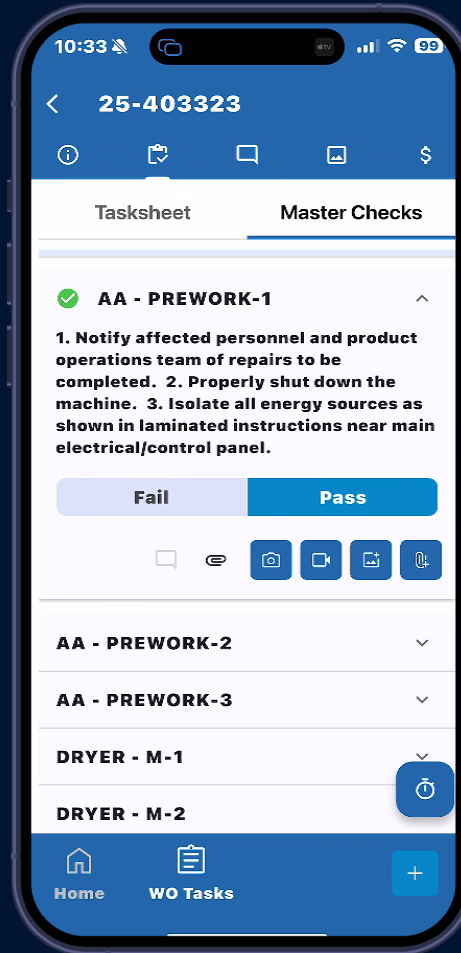
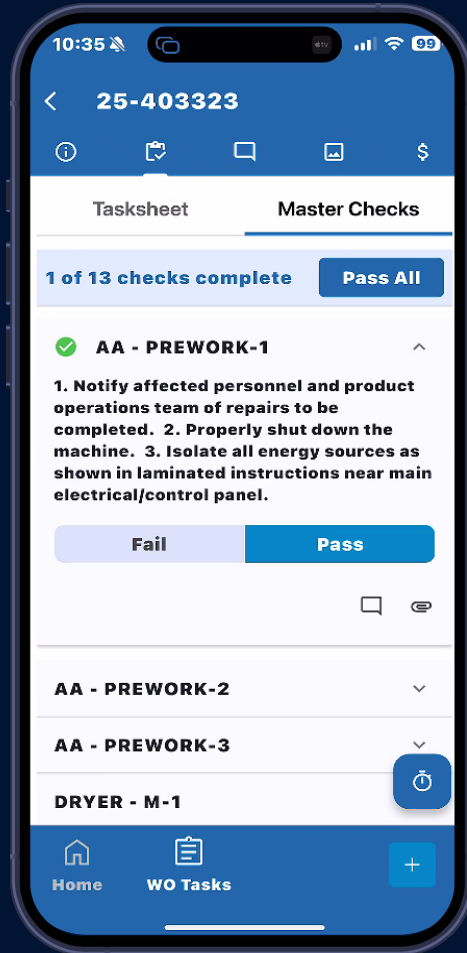
04.

How confident are you in the quality and usability of your inspection data today?

- a. Very confident – data is structured and reportable
- b. Somewhat confident – but inconsistent
- c. Not very confident – difficult to use and report on
- d. We don't actively use inspection data



Master Checks in WebTMA mobile





Master Checks in a WebTMA Work Order

Check Results

WO #* FAC-12048 Technician Code* ML
Date Technician Name* Michael Lee

Enter Check Results View 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			<input type="text"/>	2025-04-03	<input type="text"/>
PM-Generator	Monthly Generator PM	1	Gen03	How many seconds to close the bus in seconds	Master			<input type="text"/>	2025-04-03	<input type="text"/>
PM-Generator	Monthly Generator PM	1	Gen04	Run Time in hours at the start of test	Master			<input type="text"/>	2025-04-03	<input type="text"/>
PM-Generator	Monthly Generator PM	1	Gen05	Run Time in hours at the end of test	Master			<input type="text"/>	2025-04-03	<input type="text"/>
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

Save Close



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)

Item Check List Save Close

Tag # PBRFWP-4 Hide Finished Checks

Location Power Plant, Power Plant Boiler, PPBB-1, PPBB-1ST FLOOR 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="radio"/> <input type="radio"/>		<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="radio"/> <input type="radio"/>		<input type="text"/>



General Inspections in WebTMA Go

The screenshot shows a mobile application interface for a 'Work Order'. At the top, the status bar displays '3:56 PM Fri Apr 4' and '83%' battery. The app header includes 'Main Menu' with a dropdown arrow, the title 'Work Order', and buttons for 'Status', 'Save', 'Cancel', and navigation arrows. The form fields are as follows:

- Work Order #: FAC-13034
- Task Type: Life Safety
- Task: PM-FireExt
- Description: Fire Extinguisher Check
- Trade: MEP
- Failure: (empty)
- Completion Date: (empty)
- Due Date: (empty)
- Finish Date: (empty)

On the right side of the form, there are three checkboxes: 'Close Sched', 'Finish Task', and 'Close Task', all of which are currently unchecked.

At the bottom of the form, there are three checkboxes: 'Work Not Done', 'Failed PM', and 'Not Located', all of which are currently unchecked.

Below the form, there are three tabs: 'Labor', 'Start Timer', and 'General Inspection'. The 'General Inspection' tab is currently selected.

The bottom navigation bar contains five icons: 'Identity' (info icon), 'Task' (pencil icon), 'Task Sheet' (document icon), 'Required Parts List' (shopping cart icon), and 'More' (three dots icon).



General Inspections in WebTMA Go

9:06 PM Fri Apr 4 83%

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?	Compliant/Fail <input type="radio"/> N/A	
1	Is the Fire Extinguisher visible and/or is there signage in place?	Compliant/Fail <input type="radio"/> N/A	
1	Is the Fire Extinguisher easily accessible?	Compliant/Fail <input type="radio"/> N/A	

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

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

4:01PM 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?	Fail FAC-13035	
1	Is the Fire Extinguisher visible and/or is there signage in place?	Compliant/Fail > <input type="checkbox"/> N/A	
1	Is the Fire Extinguisher easily accessible?	Compliant/Fail > <input type="checkbox"/> N/A	

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



05.

How interested are you in simplifying inspections using digital checklists and structured workflows in WebTMA?

- a. Actively looking to implement
- b. Interested – want to learn more
- c. Curious but not a priority
- d. Not a priority right now

Q&A



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Thank you



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