

# How to Leverage AI within WebTMA



HARD ROCK  
CASINO & HOTELS

TULSA | MAR 30 – APR 02



# Introductions



**JOE SCARNEO** | **WebTMA Product Manager**

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Joe Scarneo is the Product Manager for WebTMA, bringing over 14 years of experience in the facilities and asset management space. Now in his second year with the company, Joe is passionate about solving complex business workflow challenges while ensuring technicians have the time and tools they need to do their jobs effectively. He believes software should empower users—not stand in their way.

Based in the Philadelphia region, Joe is a graduate of Drexel University and originally hails from the New York metropolitan area. Outside of work, he enjoys spending time with his family, following sports, and relaxing at the beach.



# Agenda

AI Powered Inbound Emails 1

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WebTMA AI SmartScheduler 2

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OTTO Chat & Graphing 3

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Q & A 4

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# 01.

## Which part of your maintenance workflow is the most manual or time-consuming today?

- a. Capturing requests (email, phone, etc)
- b. Assigning or scheduling work orders
- c. Following up on work / updates
- d. Reporting and tracking performance
- e. Other



# AI-Driven Email Work Request Automation

## ✔ Simplifies Request Submission

Enables anyone to submit maintenance requests instantly via email—no login or training required—driving higher adoption and faster reporting of issues.

## ✔ Automates Intake & Routing

Automatically creates request records and routes them to the correct repair center using domain mapping, reducing manual triage and administrative workload.

## ✔ Boosts Efficiency with AI

Pre-populates key fields like request type, location, and task codes using AI suggestions, accelerating approvals and improving data accuracy.

Message

To [inbound@tmasystems.com](mailto:inbound@tmasystems.com)

Subject Temperature Issue In room 01-100

Please see the below request:

**Building Code:** 01  
**Building Name:** Administration Building  
**Room Number:** 100  
**Location ID:** 01-100  
**Department Code:** ATH  
**Department Name:** Athletics  
**Account Number:** A100-B100-C100-D103  
**Action requested:** A/C is not cold enough

Thanks,

**Otto Requester**  
Senior Automation Assistant  
TMA Systems

Convert incoming emails into structured service requests

+ Add / Edit Copy Delete Print

Request Information

**Requester Name:** Joe Requestor  
**Phone #** 321-564-8790  
**Requester Email** joe.r@facility.com  
**Notify Me**   
**Location ID** 01-100  
**Facility Name** Main Campus   
**Building Name** Administration Building   
**Area #**



# AI-Driven Email Work Request Automation

Inbound Email Configurations

Inbound Email Type	Default Type	Active	Use AI Suggestions	Allow Linked Documents
<input checked="" type="checkbox"/> Work Request	EMAIL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Whitelisted Email Domain	Repair Center Code
tmasystems.com	TMA

1 - 1 of 1 items

**Inbound Email Address** 356dd682-af37-47d0-9e34-2e8d37c51db1+WorkRequest@inbound.webtma.com

**Active\***

**Allow Linked Documents\***

**Use AI Suggestions\***

**Default Type\*** EMAIL

Save Cancel



# 02.

## How are service requests most commonly submitted in your organization today?

- a. Email
- b. Phone calls
- c. Service request portal
- d. A mix of methods
- e. Not sure



# WebTMA AI SmartScheduler

## ✓ Reduced Supervisor Workload

Supervisors no longer need to spend hours coordinating schedules. The system handles assignments, allowing managers to focus on higher-level decisions and operations.

## ✓ Priority Task-based Optimization

The SmartScheduler prioritizes high-importance tasks and schedules them first.

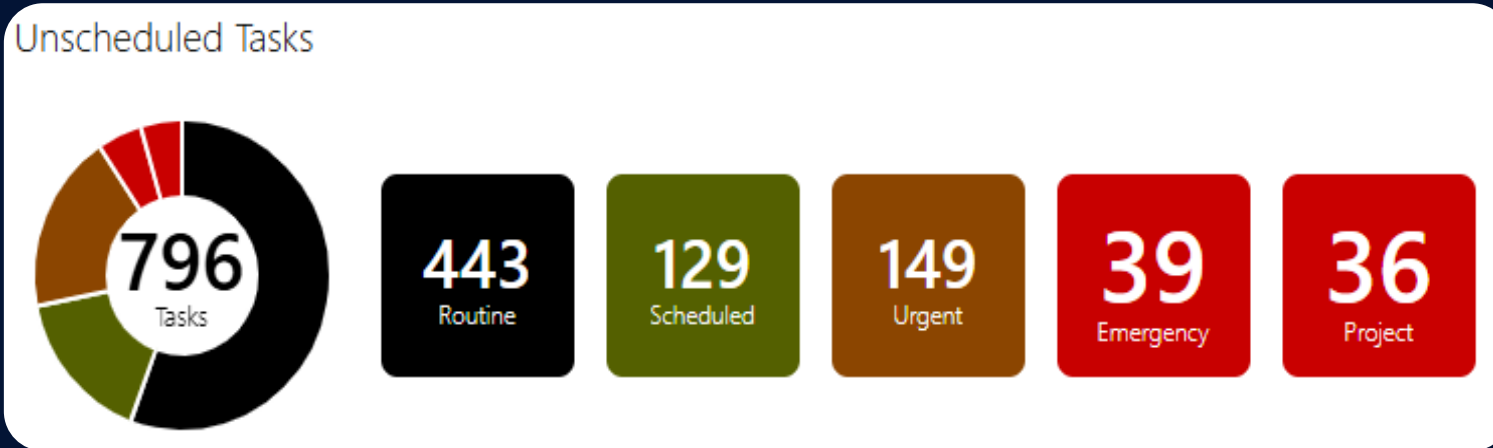
## ✓ Visual Dashboard

The modern dashboard and calendar view make it easy to track assignments, adjust schedules, and monitor progress in real time.





# WebTMA AI SmartScheduler





# Task Schedule

16 Technicians  
228.8/565 Hrs Scheduled

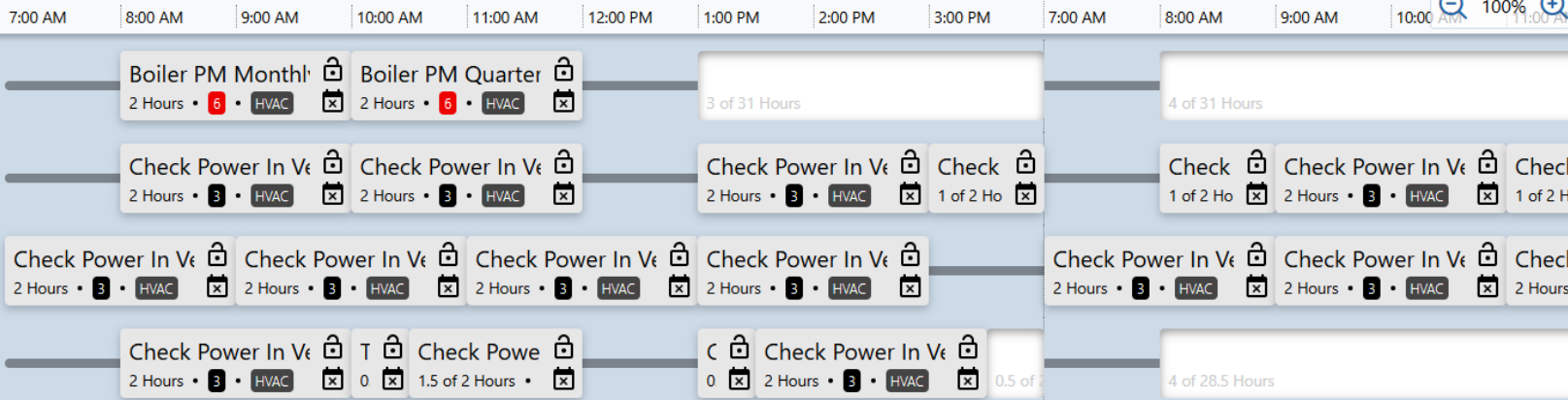


03/30/2026 - 04/05/2026 (CST)

Proposed Schedule

Monday - 03/30/2026

Tuesday - 03/31/2026



## Select Tasks

792 task(s) selected

Add all "No Hours" tasks

### TRADES

All Trades

### PRIORITIES

All Priorities

### TASK TYPES

- Too hot/cold trouble call. **NO TRADE** (6 Tasks Total) 3 Hours
- Replace Heater **TEMPERATURE CONTROL** (72 Tasks Total) 144 Hours
- Repair Heater **NO TRADE** (8 Tasks Total) 12 Hours
- Building Heating System **NO TRADE** (1 Tasks Total) 2 Hours
- Check Power In Ventilation System **HVAC** (136 Tasks Total) 272 Hours





# 03. How are work orders typically assigned to technicians today?

- a. Manually by a dispatcher
- b. Based on simple rules (location, availability)
- c. A mix of manual and automated
- d. Fully automated
- e. Not sure

# Otto: AI WO Assistant

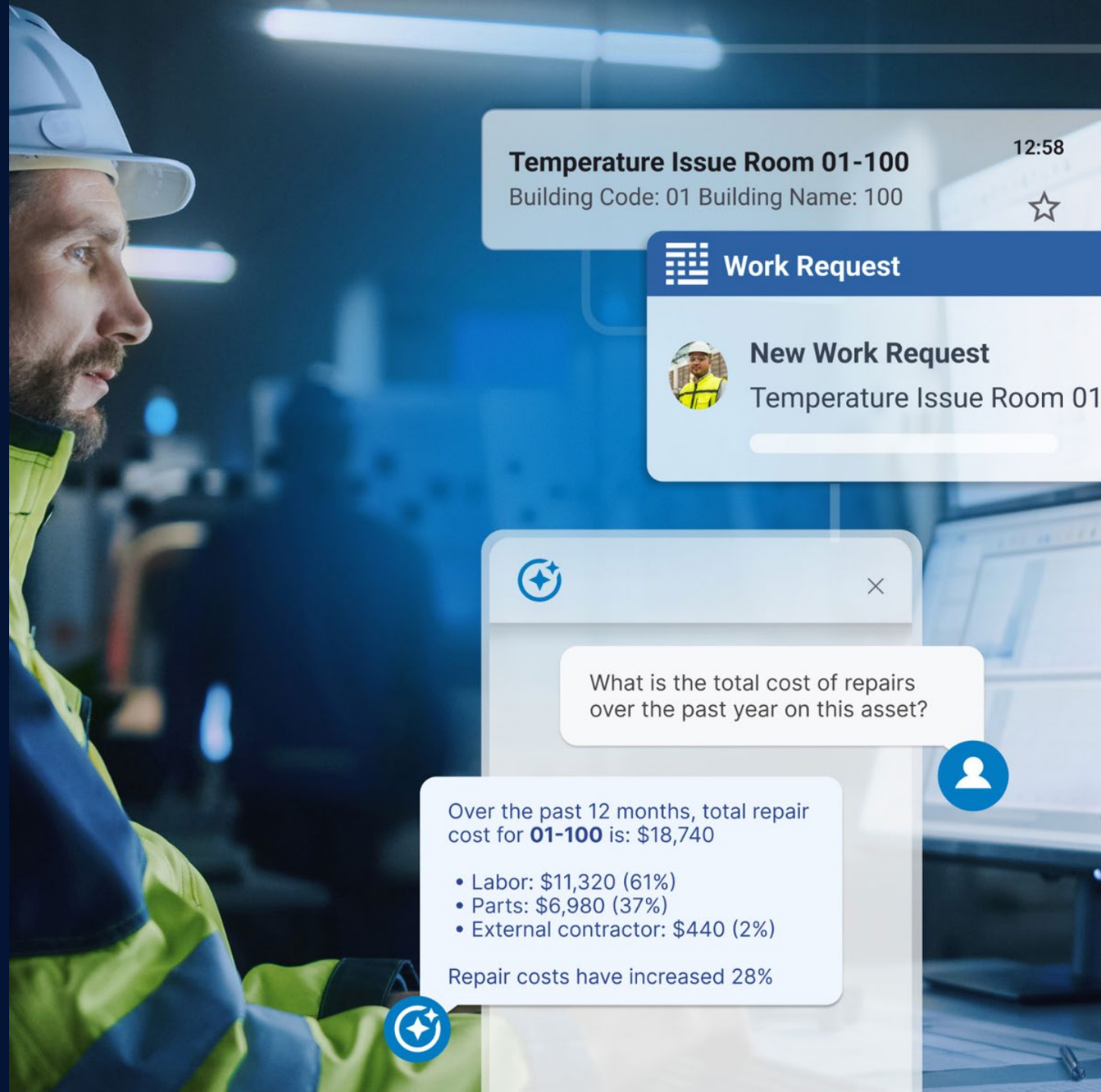
## HOW IT WORKS

- 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**





# Otto: AI WO Assistant

The screenshot displays a list of work orders in the background, with an AI chat window overlaid on the right. The chat window is titled "PP-9962681 - AI Chat" and shows a date separator for "Nov 3, 2025". A button labeled "Show me Work Order History" is visible. The chat response provides a summary of recent work orders for a specific unit and lists three items:

- 1. **PP-9972602** (Open, Emergency, Preventive Maintenance) - *Air Handling Unit - Quarterly*. Requested on October 3, 2025.
- 2. **PP-9971531** (Closed, Emergency, Preventive Maintenance) - *Air Handling Unit - Quarterly*. Completed on August 6, 2025.
- 3. **PP-9970267** (Closed, Urgent, Preventive Maintenance) - *Daily inspections for Liebert CRAH*. Completed on August 6, 2025.

The chat input field at the bottom contains the text "Ask anything about PP-9962681" and includes a microphone icon and a send button.



# 04.

How comfortable would your organization be using AI to assist with operational decisions (e.g., request routing, scheduling)?

- a. Very comfortable – already exploring AI
- b. Open to it, with oversight
- c. Somewhat hesitant
- d. Not comfortable yet



# Otto: Browse Queries & Grouping

## HOW IT WORKS

- Automatically interprets displayed query and creates a graph report
- Displays results as both a structured grid and an optimized visualization with intelligent axis selection
- Supports iterative refinement through follow-up prompts with built-in security and access control enforcement

## WHAT IT SOLVES

Removes the complexity of creating reports. Users access insights faster through a conversational interface ensuring consistency, accuracy, and security.

**Expected Release: Q2 2026**



OTTO

Mar 20, 2026

can you show the count grouped by priority instead

this minute

Fetching query schema...

Fetching query data...

Updating dataset...

Dataset updated with counts grouped by Priority Description. Current view shows:

- Priority Description: 8 Critical PM, Count: 43
- Priority Description: 9 Routine PM, Count: 69

# Live Demo





# WebTMA AI SmartScheduler Enhancements

## Current Scheduling Fit

How well does SmartScheduler align with your day-to-day scheduling needs and workflows?

## Handling Complex Schedules

What challenges exist when trying to represent more detailed or variable technician availability?

## Crew & Pair Assignments

How should scheduling adapt to jobs that require multiple technicians working together?

## Work Order Requirements

What additional information (e.g., number of techs, resources, space) would improve scheduling outcomes?

## AI Decisions

In which situations do you trust automated scheduling most, and where do you feel uncertain?

## Opportunities for Improvement

What changes or enhancements would make SmartScheduler more valuable and easier to use?



# 05. Where do you see the biggest potential value of AI in your operations?

- a. Reducing manual administrative work
- b. Improving response times
- c. Better resource allocation (staffing/scheduling)
- d. Improving data quality and consistency
- e. Enhancing user experience (self-service, chatbot)

Q&A

Thank you

