

Product Roadmap – Election for Direction



HARD ROCK
CASINO & HOTELS

TULSA | MAR 30 – APR 02



Introductions



JOE SCARNEO | WebTMA Product Manager

joe.scarneo@tmasystems.com

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

Product Roadmap 4

Delivered items from EFD 2025 14

Election for Direction 2026 15

Voting 19



Interactive Floorplans

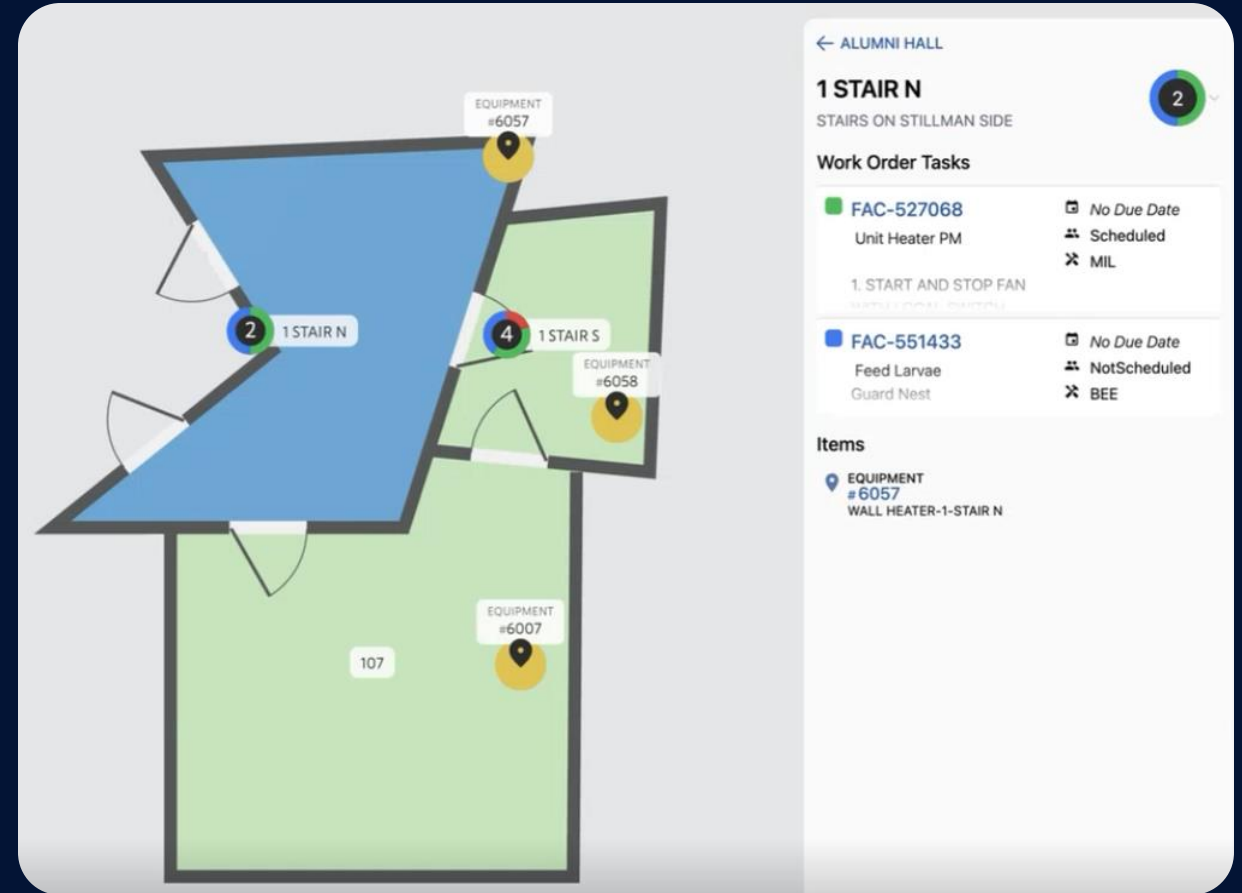
HOW IT WORKS

- 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

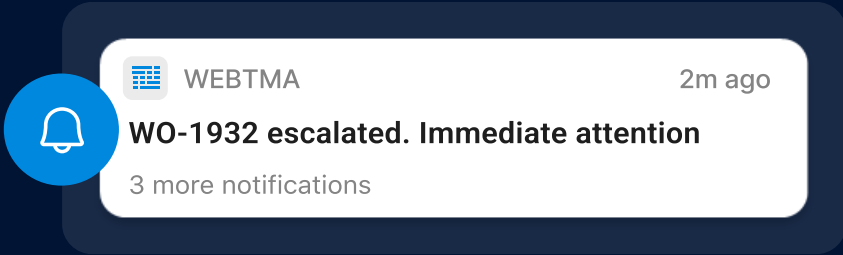
DURATION
0.25 Hours

Task Comments

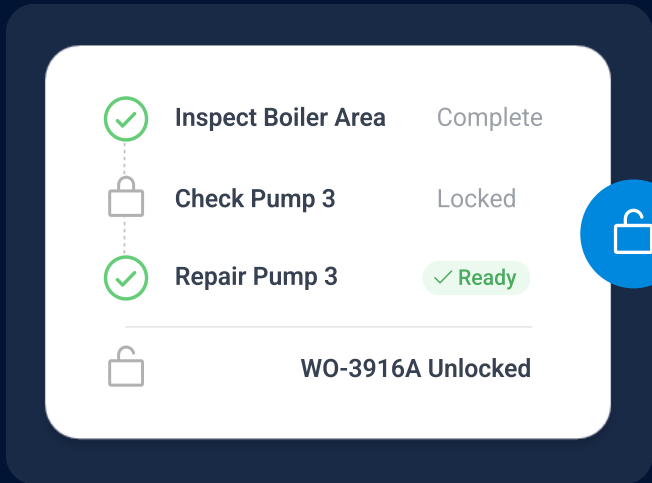
No comments



Upcoming Features

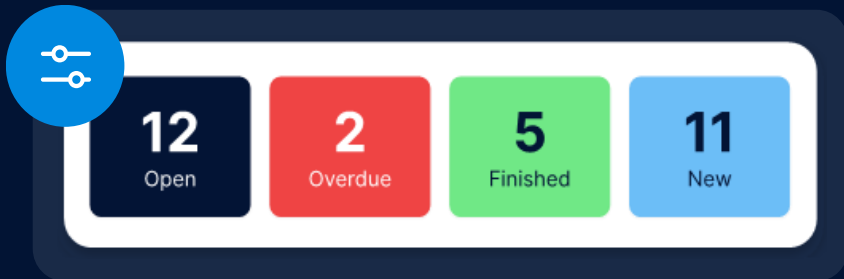


WEBTMA 2m ago
WO-1932 escalated. Immediate attention
3 more notifications



- Inspect Boiler Area Complete
- Check Pump 3 Locked
- Repair Pump 3 Ready

WO-3916A Unlocked



12 Open	2 Overdue	5 Finished	11 New
------------	--------------	---------------	-----------

1. SMS / Text Message Notification

Allow notifications to be sent via text message instead of email. Includes scheduling alerts, notification and escalation rules, ad hoc manager texting, and select parts notifications.

2. WO Task Prerequisites

Arrange task dependencies to alert users when their task is allowed to begin. Improved reporting around start times based on task being unlocked.

3. Tile Management

Enable Admins to define custom queries to populate Active Tasks page Dashboard Tiles for a more customized workflow.

Expected releases: Q2 2026



Upcoming Features




Cycle Count 25
18

Asset Condition SF-BLR 01

<input type="checkbox"/>	Fuel Valve	7/10
<input type="checkbox"/>	Burner	4/10

Condition **Average**



MEDIGATE
AeroScout



4. Cycle Counting

Will allow automated Cycle Count reports for Materials Management clients. Count History will be logged for reporting and stock adjustments are automatic.

5. Asset Condition Assessment

Enhance Task Checklist capability to create condition forms for a specific item. Scores will be associated to checks to be used in a formula for condition rating.

6. Biomed Integrations

Integrations with both Medigate and Aeroscout. Medigate updating BioMed equipment and Aeroscout updating location information.

Expected releases: Q3 2026



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.

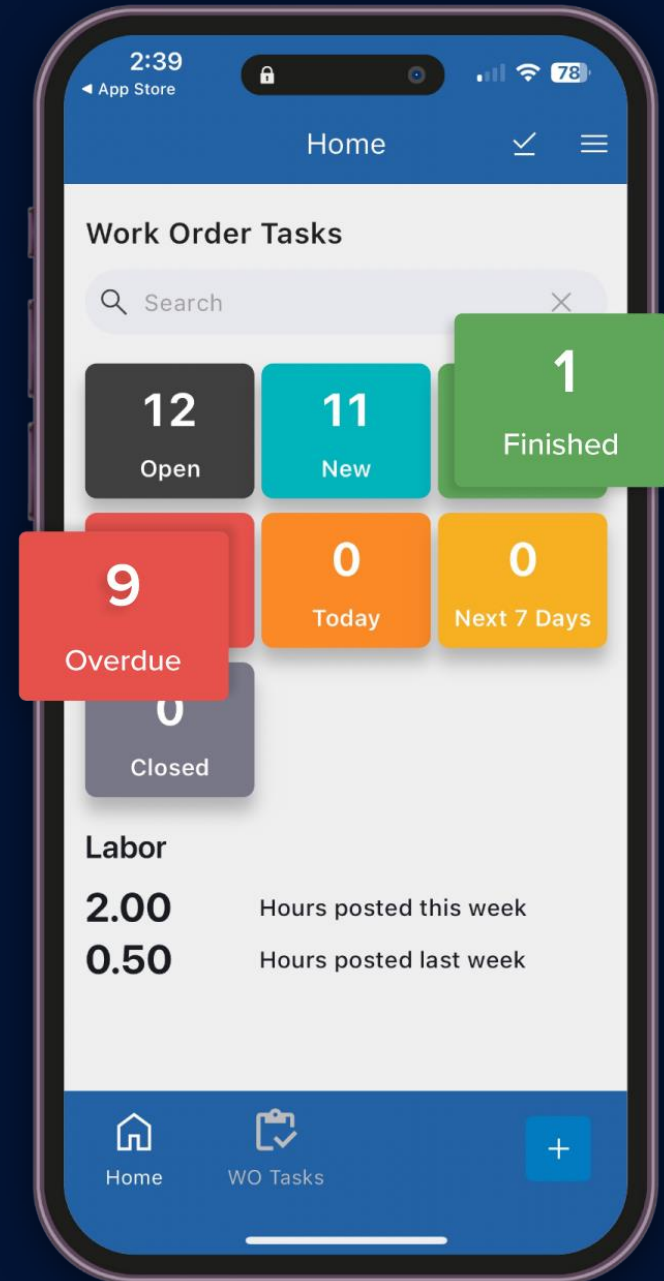
TILE MANAGEMENT

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

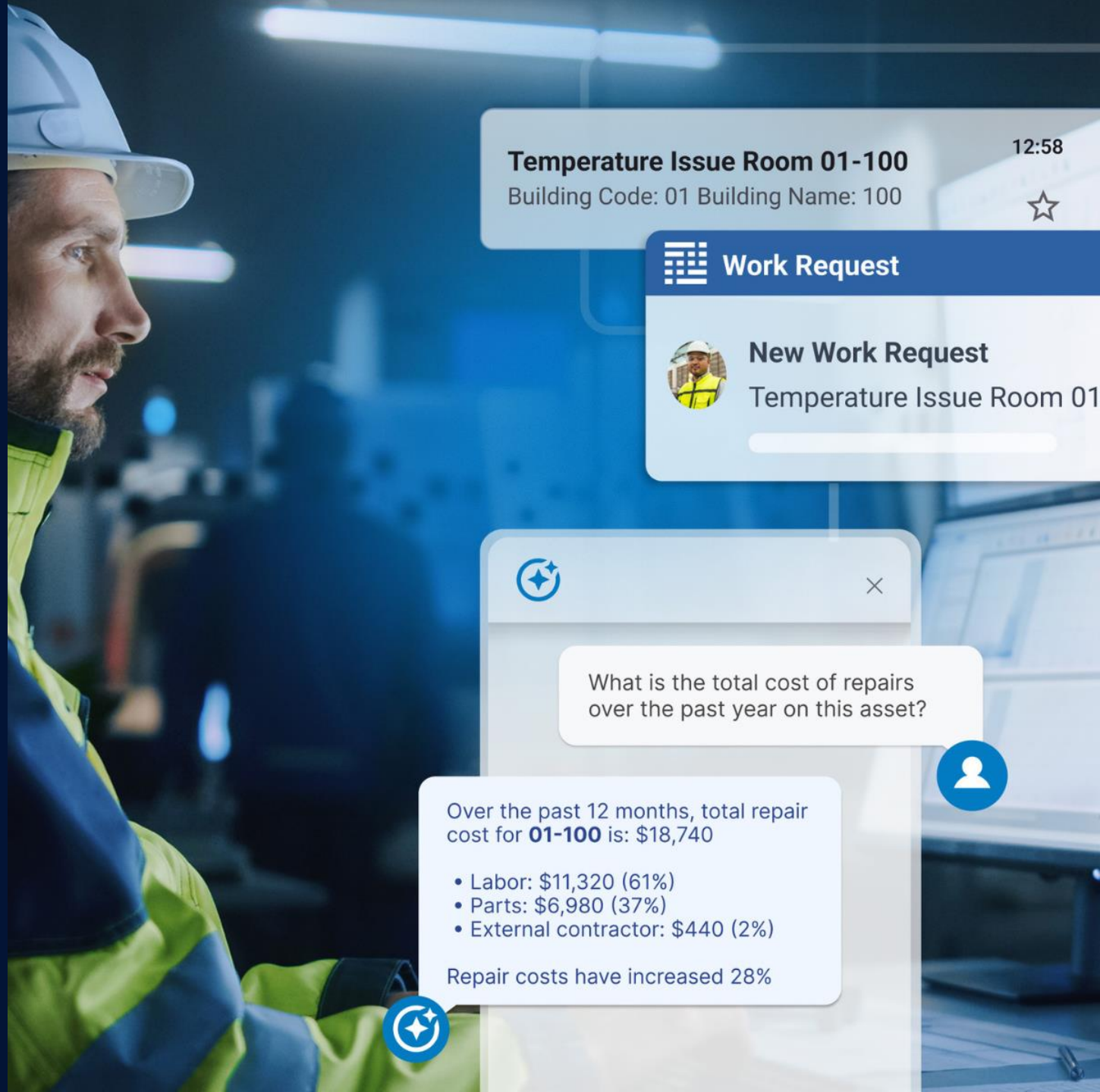
HOW IT WORKS

- 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





Otto: Browse Queries & Grouping

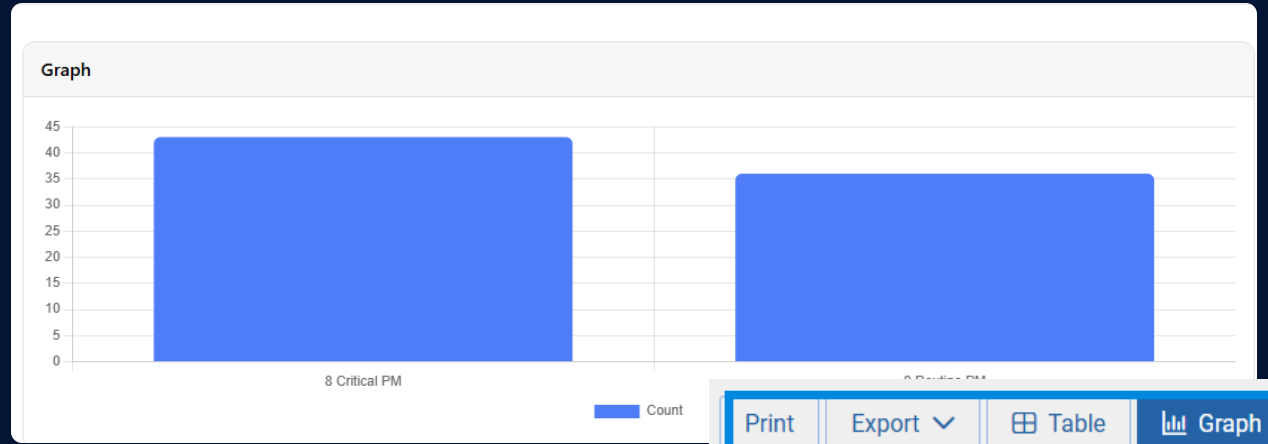
HOW IT WORKS

- 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



The screenshot shows the Otto interface. At the top, there are navigation buttons: "Print", "Export", "Table", and "Graph" (which is selected). Below the buttons is the Otto logo and the date "Mar 20, 2026". A user query is shown in a light blue bubble: "can you show the count grouped by priority instead". The system response is in a white bubble and includes a loading indicator "Fetching query schema...", "Fetching query data...", and "Updating dataset...". Below this, it says "Dataset updated with counts grouped by Priority Description. Current view shows:" followed by a list of results: "Priority Description: 8 Critical PM, Count: 43" and "Priority Description: 9 Routine PM, Count: 39".



The Road Ahead: AI Enhancements in WebTMA

 <p>AI Dispatcher: Incoming Calls</p> <p>AI-powered voice bot that answers inbound service request calls and automatically creates requests in WebTMA</p>	 <p>AI Powered Duplicate Notification</p> <p>Analyzes new service requests against existing requests and work orders to identify potential duplicates</p>	 <p>Root Cause Analysis</p> <p>Leverages historical work order data, asset context, and technician insights to identify likely causes of failure and recommend corrective actions</p>	<p>Planned Releases: Q2 2026</p>
 <p>Work Request to WO AI Suggestions</p> <p>Will populate WO fields in the Request authorization step based on common context and past behavior.</p>	 <p>Comment Improvement</p> <p>Have text summarized by AI for content / proofreading. Making external comments more professional to requestors.</p>	 <p>Finished Work Order Review</p> <p>Automated process of reviewing set criteria for WO Close.</p>	<p>Planned Releases: Q3 2026</p>

Election for Direction

Overview

- Election for Direction is held each year at TMA Connect
- Opportunity for clients to directly impact the product roadmap priorities
- We review popular enhancements from the User Community, support submissions, and internal ideas
- Clients in attendance vote and that helps shape engineering investments for the upcoming year
- Since last TMA Connect, we delivered 9 out of the 24 items discussed





Delivered Election for Direction Enhancements

Delivered since TMA Connect 2025

- Batch Finish (04/29/2025)
- Last Login Visibility (08/19/2025)
- Workday Financial Integration (11/11/25)
- Linked Document Column (11/25/2025)
- Saved Queries on new UI (12/09/25)
- Create Service Request from Email with AI (01/07/26)
- Copy Work Order Enhancement (03/17/26)
- Workday Procurement Integration (03/31/26)
- Visual Floorplan Layout (04/2026)



Election for Direction 2026 Candidates

01

Work Order Chat

Ability to send chat notifications between technicians (and their supervisor) assigned to the same work order. Would appear as notification on mobile and in chat window on browser.

02

Work Order Email Attachment

Provide a configurable option to include a PDF attachment of the Work Order on the email to the requestor when a work order is closed. There would be an option to select which WO format to attach (detailed/summary).

03

Follow-up WO Workflow

Simple method for tech to indicate that the work has not been finished and requires a different trade. Will create a new task on the work order and notify the supervisor. Tech will enter a description and there will be a permission to allow the trade to be selected or not.



Election for Direction 2026 Top 3

01

Task Level Frequencies on PMs

Allow tasks on PM schedules to have different frequencies. One PM would be created for an asset and then the user can define which tasks are performed monthly, quarterly, annually, etc. Today multiple PM's have to be created thus creating a PM consolidation issue.

02

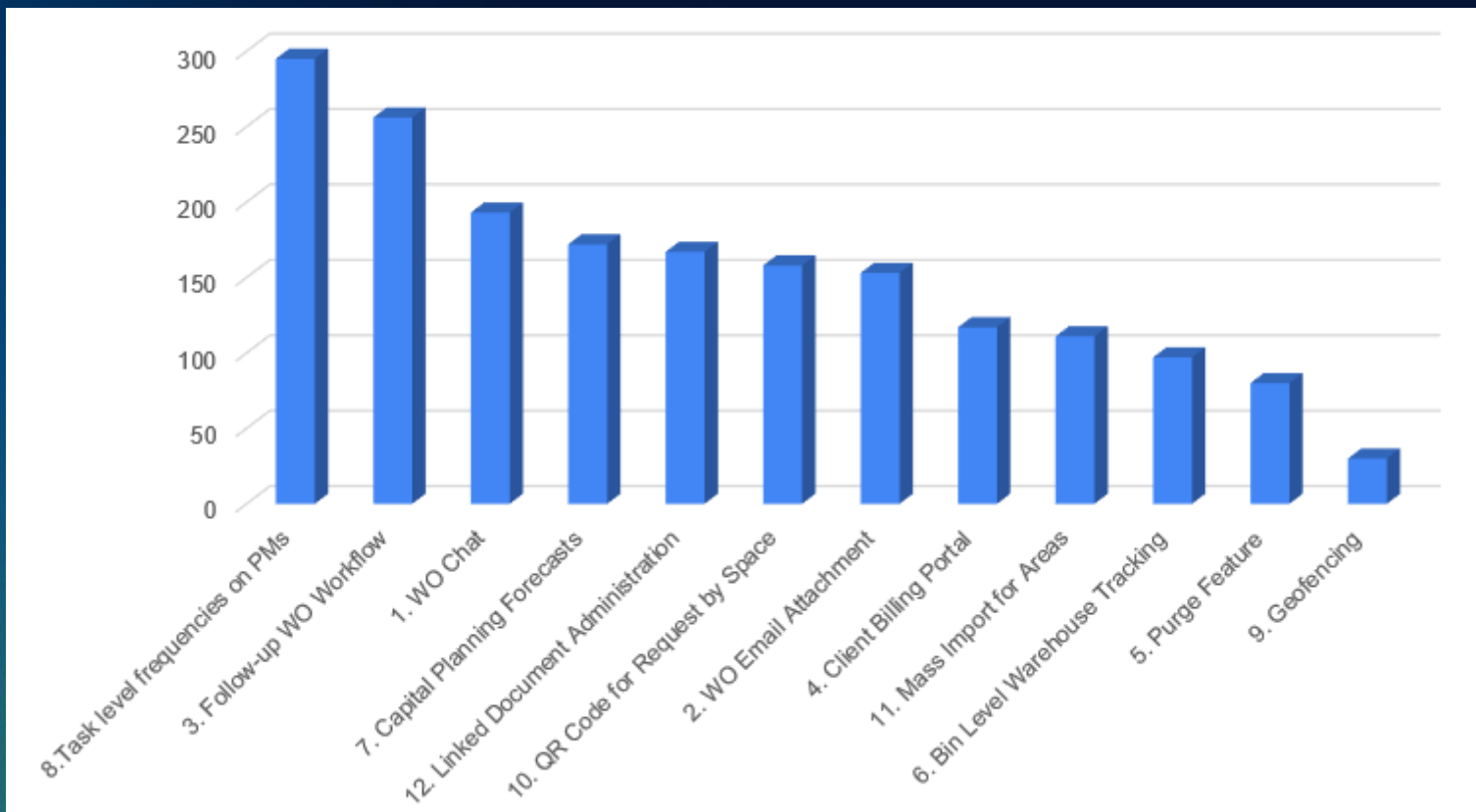
Follow-up WO Workflow

Simple method for tech to indicate that the work has not been finished and requires a different trade. Will create a new task on the work order and notify the supervisor. Tech will enter a description and there will be a permission to allow the trade to be selected or not.

03

Work Order Chat

Ability to send chat notifications between technicians (and their supervisor) assigned to the same work order. Would appear as notification on mobile and in chat window on browser.





Election for Direction 2026 Candidates

04

Client Billing Portal

Provide an external portal for “clients” to login and review charges from work performed. Department leaders and administration will have the ability to review detailed charges by work order. This could also be used for external clients.

05

Purge Feature

Create the ability to purge historical records to support organization record retention policies. This would allow data set selection and purge records before a selected date.

06

Bin level Warehouse Tracking

Part SKU’s can indicate a bin within a warehouse in WebTMA. There is currently no ability to have multiple bins in a warehouse contain the same part or receive/pick from bin levels. This would add bin visibility and selection for all on hand adjustment transactions.



Election for Direction 2026 Candidates

07

Capital Planning Forecasts

Provide the ability to create multiple forecasts (i.e. best case scenario, worst case scenario, likely scenario) for your Capital Plan. Today, WebTMA only allows a single capital plan.

08

Task Level Frequencies on PMs

Allow tasks on PM schedules to have different frequencies. One PM would be created for an asset and then the user can define which tasks are performed monthly, quarterly, annually, etc. Today multiple PM's have to be created thus creating a PM consolidation issue.

09

Geofencing

This would add the ability to enable geofencing for work performed on work orders. Tech could not post time/costs to a work order within being in close proximity of where the work is performed when enabled.



Election for Direction 2026 Candidates

10

QR Code for Request by Space

Ability to generate QR code for the Service Request Portal with the location defaulted.

11

Mass Import for Areas

Provide the ability to import new areas and edit existing areas with the Mass Import tool (User Community Suggestion)

12

Linked Documents Administration

Create a global attachments screen to see across all transactions. Include a drag and drop for adding attachments. Provide thumbnail images for pictures to quickly identify correct attachment.



Election for Direction Summary

- WO Chat
- WO Email Attachment
- Follow-up WO Workflow
- Client Billing Portal
- Purge Feature
- Bin level Warehouse Tracking
- Capital Planning Forecasts
- Task level frequencies on PMs
- Geofencing
- QR Code for Request by Space
- Mass Import for Areas
- Linked Documents Administration

Q&A / Thank you