



UC25 | April 8th - 10th 2025

Taking Care of Business:

User Friendly Request Processing
with the New Service Request Portal

UC
25 YEARS
OF COMMUNITY, PARTNERSHIP, AND GROWTH



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Tim Prado is a seasoned professional with over two decades of experience in Computerized Maintenance Management Systems (CMMS) and Facilities Management. Throughout his career, he has successfully implemented CMMS solutions for prestigious clients including the University of California - Santa Barbara, University of Alabama - Birmingham, the Department of Energy, CKS Packaging, Johnson Controls, and Western Digital.





Tammy Neal

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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. Service Request Portal Introduction
2. Features & Capabilities
3. Components
4. Examples
5. Live Demonstration



Hands Up! Polling Question

How many in the audience are currently on WebTMA version 7?



Hands Up! Polling Question

How many in the audience are currently using the Service Request Form in WebTMA 7?



Service Request Portal

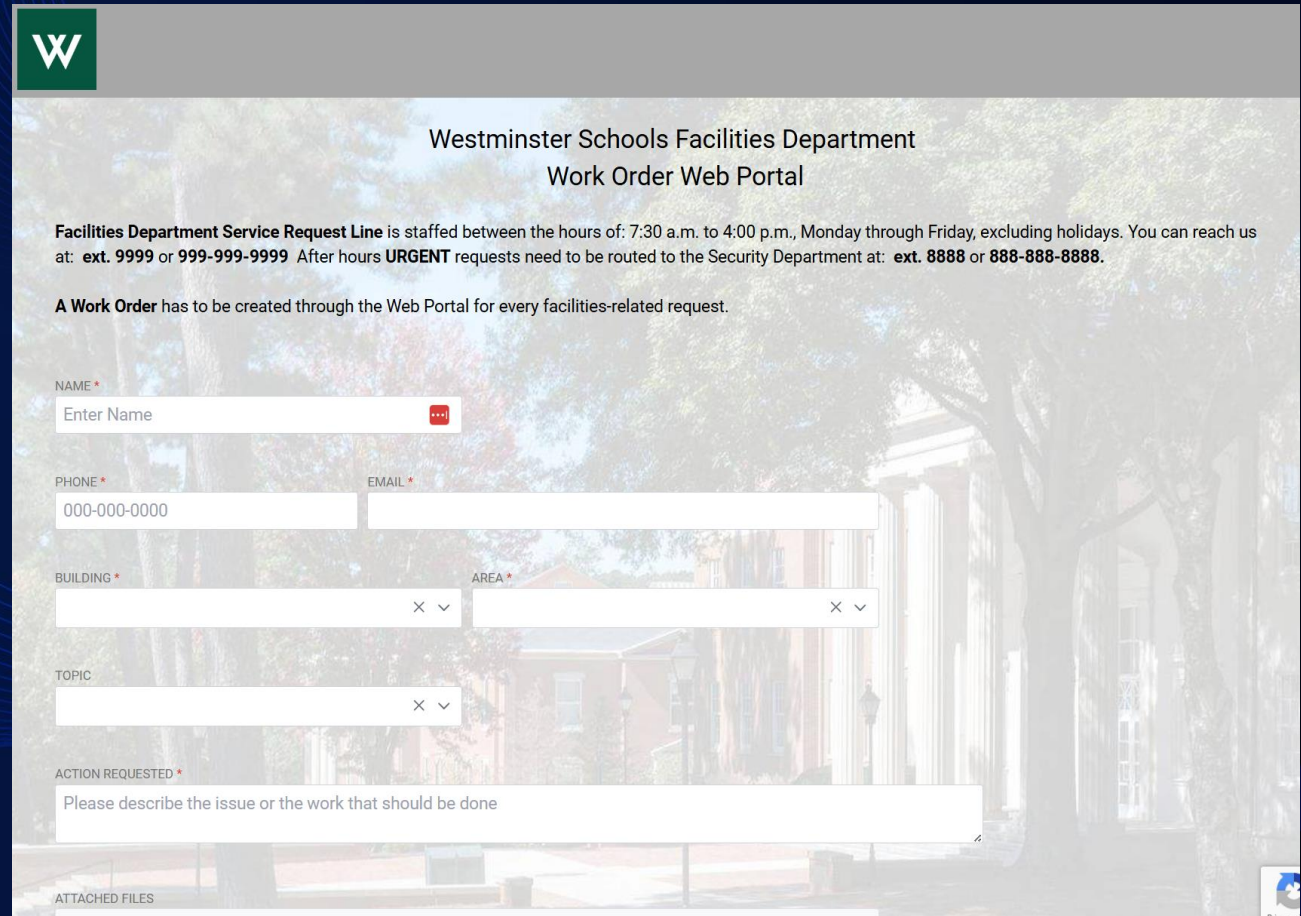
- Released in December 2024 in ver. 7
- Available to all customers who own the Service Request module
- Modern and simple site development
- No impact to the existing Service Request Form
- Must enable the menu to build the portal forms– see your system administrator

The screenshot displays the 'Service Request Form - Simple Request' interface. The header includes a navigation bar with a home icon, the breadcrumb 'Service Requests / Request Form - Simple Request', and a URL. Below the header, there are tabs for 'Submission', 'Confirmation', and 'Status'. The main form area is titled 'Submit Service Request' and contains a text area for 'ISSUE DESCRIPTION' with a placeholder text. To the right of the form is a 'FORM BLOCKS' sidebar with sections for 'ORGANIZATION' (Repair Center, Department), 'REQUEST' (Action Requested, Task Code), 'LOCATION' (Facility, Building, Area, Floor), 'REQUESTOR INFO' (Requestor Name, Phone Number, Email Address), and 'TEXT' (Rich Text, Section Title). The interface is modern and clean, with a blue and white color scheme.



Features and Capabilities

- Improved look and feel
- Simplified layout to build the form
- Suggested formatting in fields (phone, accounts, etc.)
- Layout view for mobiles and tablets to check for compatibility
- Accessibility compliance checker
- Additional branding capability
- Requestors can check status of request without a login
- Email with link to status page for requestors
- Simplified document/photo uploads



The screenshot displays the 'Westminster Schools Facilities Department Work Order Web Portal'. At the top left is a green square logo with a white 'W'. The header text reads 'Westminster Schools Facilities Department' and 'Work Order Web Portal'. Below this, a paragraph states: 'Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: ext. 9999 or 999-999-9999 After hours URGENT requests need to be routed to the Security Department at: ext. 8888 or 888-888-8888.' A note below says: 'A Work Order has to be created through the Web Portal for every facilities-related request.'

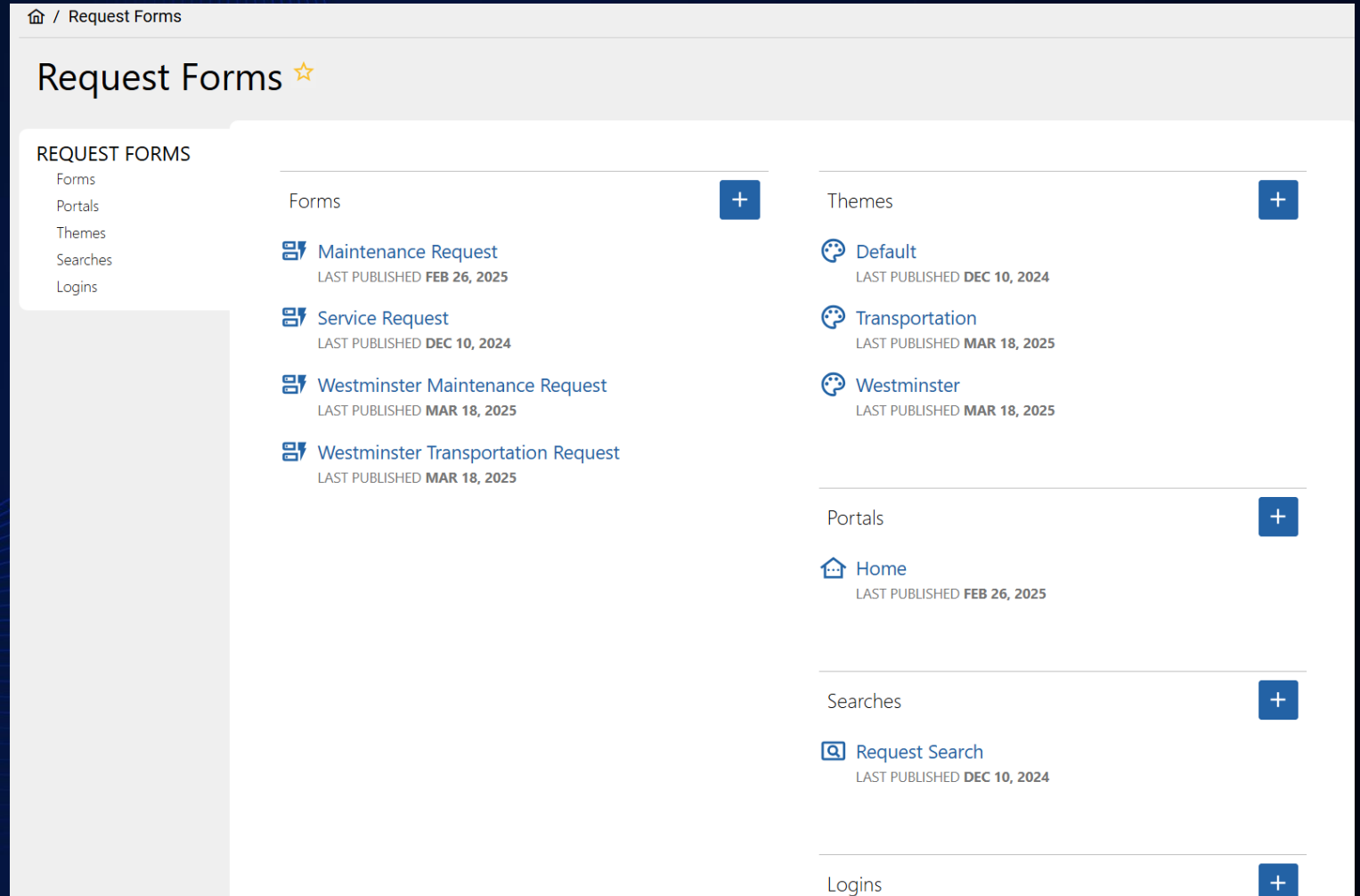
The form contains the following fields:

- NAME ***: A text input field with the placeholder 'Enter Name' and a red 'x' icon.
- PHONE ***: A text input field with the placeholder '000-000-0000'.
- EMAIL ***: A text input field.
- BUILDING ***: A dropdown menu with a close 'x' and a dropdown arrow.
- AREA ***: A dropdown menu with a close 'x' and a dropdown arrow.
- TOPIC**: A dropdown menu with a close 'x' and a dropdown arrow.
- ACTION REQUESTED ***: A text input field with the placeholder 'Please describe the issue or the work that should be done'.
- ATTACHED FILES**: A section for file uploads.

The background of the form is a faded image of a school building and trees. A small blue circular icon is visible in the bottom right corner of the form area.

SRP Components

- Themes
- Forms
- Portals
- Searches
- Logins



SRP Themes – Standardization

- Consistent branding
- Can have multiple themes
- Check accessibility
- Add logo, background images, customize fonts

The screenshot displays the 'Service Request Theme' configuration page for 'Westminster'. The interface is divided into two main sections: 'Header' and 'Form' on the left, and a 'Preview' on the right.

Header Section:

- Show Header:** A checkbox that is checked.
- HEIGHT (IN PX):** A numeric input field set to 100.
- HEADER COLOR:** A color picker showing a greyish-blue color with the hex code #a7a7a7.
- LOGO:** A section for uploading a logo. It includes a 'Select File...' button and a note: 'LOGO FORMAT AND SIZE: Logo size cannot exceed 90px high by 500px wide. Acceptable file formats - .png, .svg'. Below this, a preview of the logo (a green square with a white 'W') is shown, labeled 'misc_133206.png' and '1.139 KB'.
- URL LINK FROM YOUR LOGO:** A text input field containing 'https://yourcompany/home.com'.
- Header Accents:** A dropdown menu currently set to 'v'.

Form Section:

- BASE FONT SIZE (IN PX):** A numeric input field set to 18.
- BASE FONT:** A text input field containing '"Roboto", "Proxima Nova", sans-serif'.
- BUTTON COLOR:** A color picker showing black with the hex code #000000.
- LINK COLOR:** A color picker showing black with the hex code #000000.

Preview Section:

- A 'Check Accessibility' button is located at the top right of the preview area.
- The preview shows a header with the Westminster logo (a green square with a white 'W') and a grey background.
- Below the header, there are labels for 'Button Color' (black) and 'Link Color' (black).
- The main content area shows a 'Title' followed by a paragraph of Lorem Ipsum text.

SRP Forms

- Publish function allows deployment control
- Drag and drop fields
- Preview page for different layouts
- Confirmation, status, submission error design

Service Request Form • **Westminster Maintenance Request**

<https://uc25.webtma.com/app/request/b3c7edda-ff32-4180-9670-176bb4376ba9> There are no changes since last published

Submission Confirmation Status Submission - Error Status - Not Found

Westminster Schools Facilities Department
Work Order Web Portal

Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: **ext. 9999** or **999-999-9999**. After hours **URGENT** requests need to be routed to the Security Department at: **ext. 8888** or **888-888-8888**.

A **Work Order** has to be created through the Web Portal for every facilities-related request.

NAME * REPAIR CENTER REQUEST TYPE

Enter Name

PHONE * EMAIL *

000-000-0000

Keyword

TEXT AND IMAGES

- TITLE
- PARAGRAPH
- RICH TEXT
- EXTERNAL IMAGE

BUTTONS

- SUBMIT BUTTON
- RELOAD BUTTON

LINKS AND ATTACHMENTS

- FILE UPLOAD
- FORM/PORTAL LINK

REQUESTOR

- REQUESTOR NAME
- REQUESTOR EMAIL
- REQUESTOR PHONE

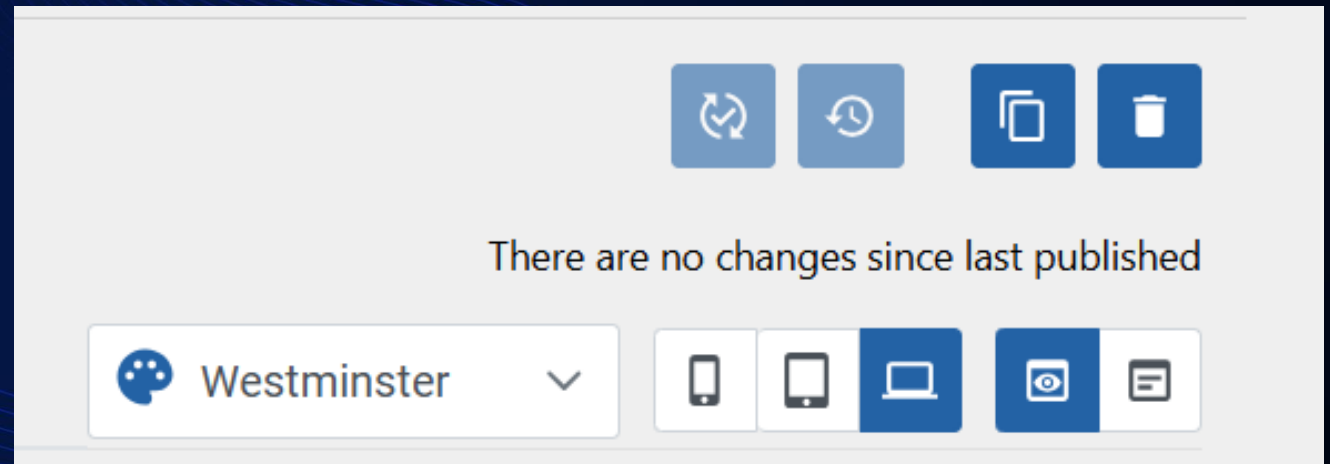
ORGANIZATION



SRP Forms – Preview Layouts

Preview Layouts for 3 formats:

- Laptop/Computer
- Tablet
- Mobile



SRP Forms – Laptop Layout

Service Request Form • **Westminster Maintenance Request**

<https://uc25.webtma.com/app/request/b3c7edda-ff32-4180-9670-176bb4376ba9>

There are no changes since last published

Submission

Confirmation

Status

Submission - Error

Status - Not Found

Westminster

W

Westminster Schools Facilities Department
Work Order Web Portal

Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: **ext. 9999** or **999-999-9999**. After hours **URGENT** requests need to be routed to the Security Department at: **ext. 8888** or **888-888-8888**.

A Work Order has to be created through the Web Portal for every facilities-related request.

NAME *

Enter Name

PHONE *

000-000-0000

EMAIL *



SRP Forms – Tablet Layout


Service Request Form • **Westminster Maintenance Request**

<https://uc25.webtma.com/app/request/b3c7edda-ff32-4180-9670-176bb4376ba9>

Submission Confirmation Status Submission - Error Status - Not Found

Westminster

There are no changes since last published



Westminster Schools Facilities Department
Work Order Web Portal

Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: **ext. 9999** or **999-999-9999**. After hours **URGENT** requests need to be routed to the Security Department at: **ext. 8888** or **888-888-8888**.

A Work Order has to be created through the Web Portal for every facilities-related request.

NAME *

Enter Name

PHONE *

000-000-0000

EMAIL *



SRP Forms – Mobile Layout

Service Request Form • **Westminster Maintenance Request**

<https://uc25.webtma.com/app/request/b3c7edda-ff32-4180-9670-176bb4376ba9>

There are no changes since last published

Submission

Confirmation

Status

Submission - Error

Status - Not Found

Westminster

W

Westminster Schools Facilities
Department
Work Order Web Portal

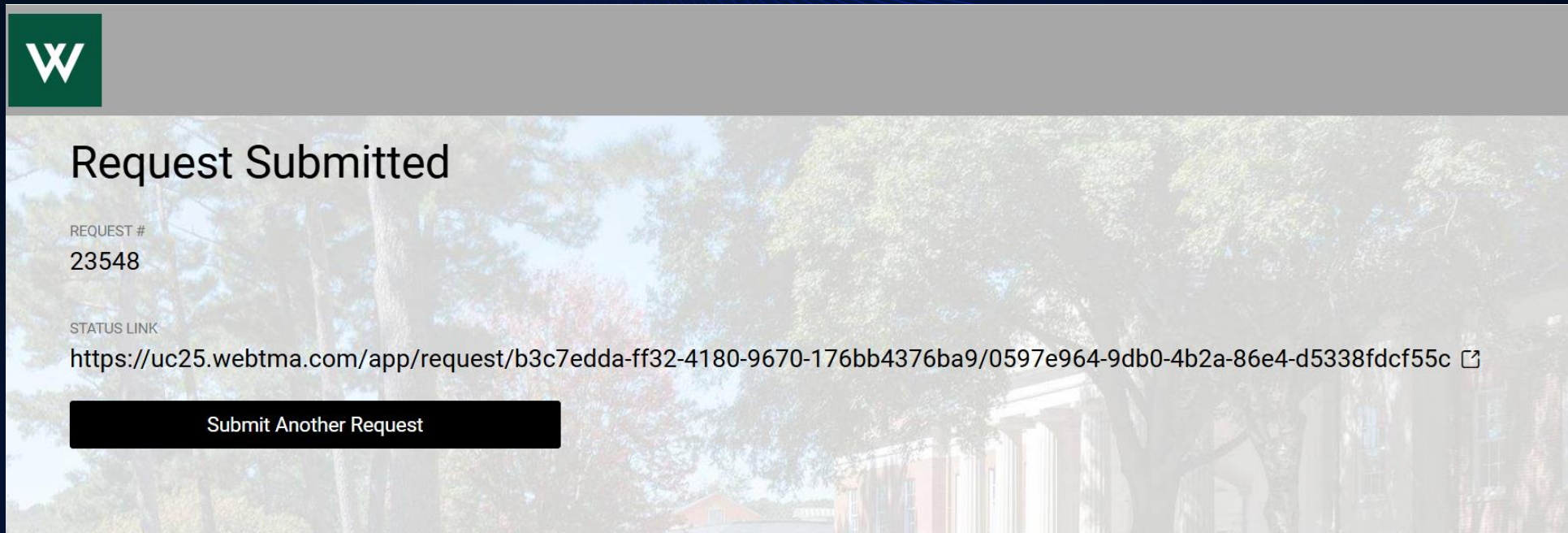
Facilities Department Service Request Line is
staffed between the hours of: 7:30 a.m. to 4:00
p.m., Monday through Friday, excluding
holidays. You can reach us at: **ext.**
9999 or **999-999-9999**. After
hours **URGENT** requests need to be routed to
the Security Department at: **ext. 8888** or **888-**
888-8888.

A Work Order has to be created through the
Web Portal for every facilities-related request.

NAME *
Enter Name




SRP Forms – Confirmation Design

A mockup of a web confirmation page. It features a green square logo with a white 'W' in the top left corner. The main heading is 'Request Submitted'. Below this, it shows 'REQUEST #' followed by '23548'. Then, it shows 'STATUS LINK' followed by a long URL and an external link icon. At the bottom, there is a black button with the text 'Submit Another Request'. The background of the page is a faded image of a building with columns and trees.

W

Request Submitted

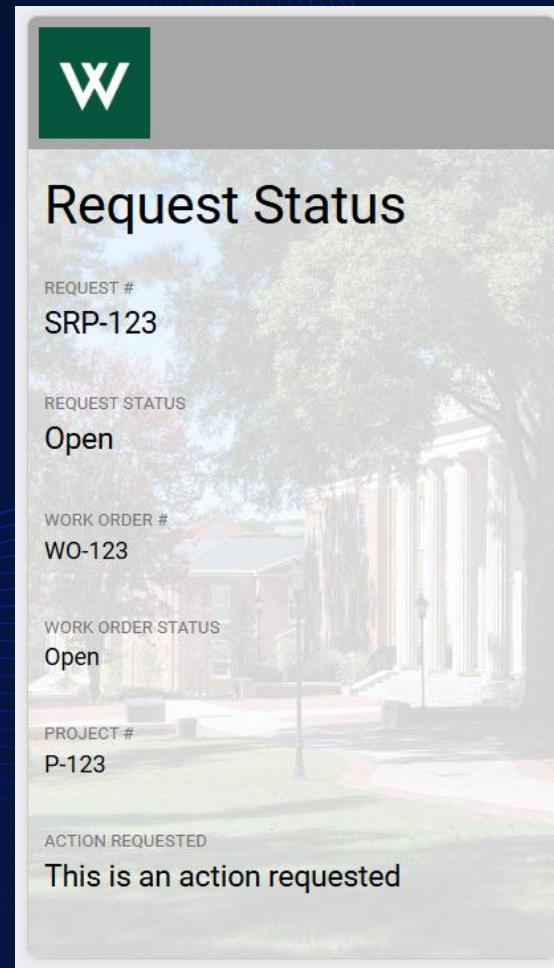
REQUEST #
23548

STATUS LINK
<https://uc25.webtma.com/app/request/b3c7edda-ff32-4180-9670-176bb4376ba9/0597e964-9db0-4b2a-86e4-d5338fdcf55c> 

Submit Another Request



SRP Forms – Status Design

A mobile application form titled "Request Status" with a green 'W' logo in the top left. The form contains several fields with labels in all caps and values in title case. The background of the form is a faded image of a classical building with columns. The fields are: REQUEST # (SRP-123), REQUEST STATUS (Open), WORK ORDER # (WO-123), WORK ORDER STATUS (Open), PROJECT # (P-123), and ACTION REQUESTED (This is an action requested).

W

Request Status

REQUEST #
SRP-123

REQUEST STATUS
Open

WORK ORDER #
WO-123

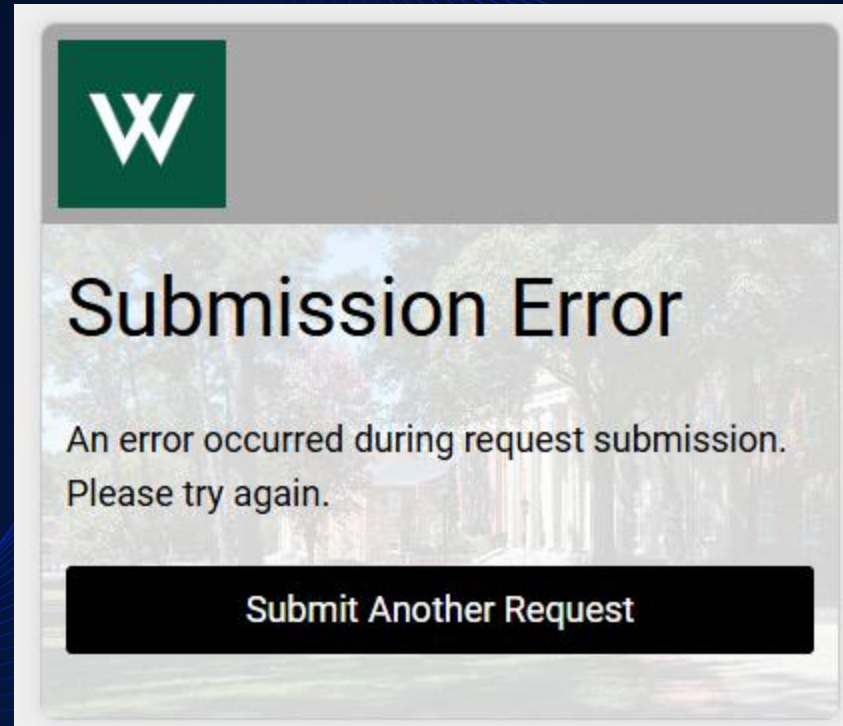
WORK ORDER STATUS
Open

PROJECT #
P-123

ACTION REQUESTED
This is an action requested



SRP Forms – Error Message Design



Hands Up! Polling Question

How many in the audience have more than 1 type of service request form?

- Maintenance
- Res Life
- Materials
- Etc.

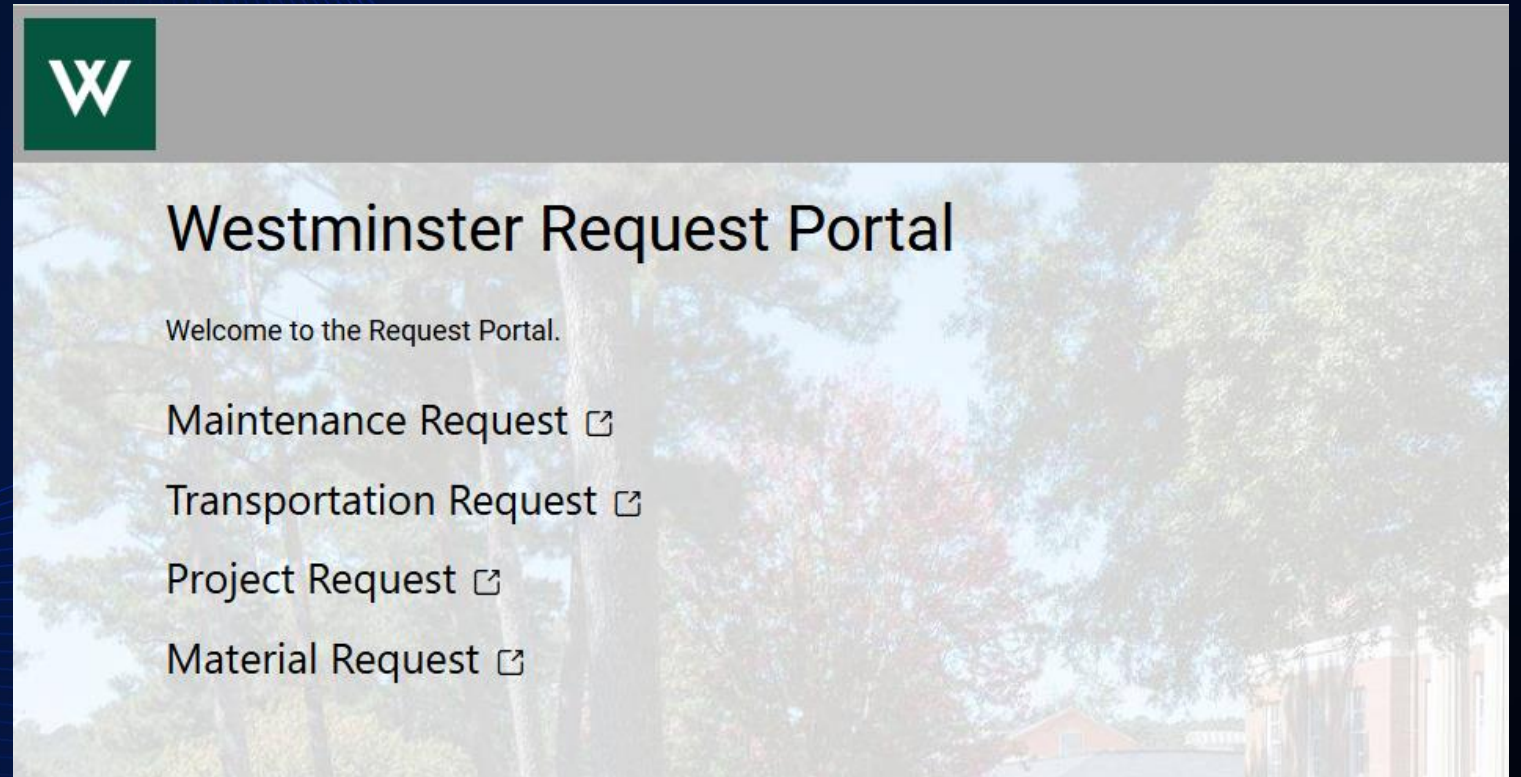


SRP Portal


Create a simple landing page for all your request forms.

Can add rich text, images, etc.

Allows your IT department to maintain 1 URL link rather than many.



Maintenance Request



Westminster Schools Facilities Department Work Order Web Portal

Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: **ext. 9999** or **999-999-9999**. After hours **URGENT** requests need to be routed to the Security Department at: **ext. 8888** or **888-888-8888**.

A Work Order has to be created through the Web Portal for every facilities-related request.

NAME *

PHONE *

EMAIL *

BUILDING *

AREA *

TOPIC

ACTION REQUESTED *

ATTACHED FILES



Transportation Request

W

Welcome to Transportation Cats!

Transportation at the Westminster Schools is an important resource to supplement the educational and athletic activities of the Westminster community. We are dedicated to making all journeys a safe and pleasant experience.

Steps Prior to Driving:

- Provide a copy of your driver's license to our Coordinator of Enterprise Operations.
- Complete the required online driver safety course.
- Schedule a brief introduction into the operations of student transport vehicles with the Transportation department.

Vehicle Requisition Process:

- You must have approval from your Division/Department Head before submitting this form.
- Transportation requests must be submitted at least one week in advance of your travel date to allow enough time to prepare your vehicle. Vehicles requested within the same week are not permissible.
- All vehicles will be picked up at the Facilities building next to the loading dock on the Transportation Board.
- All vehicles should be returned to the Facilities building daily for inspection.
- Keys should be returned to the key drop box next to the loading dock.

Rates:

- 1-4 Hour Rental: \$22 per hour
- Daily Rental:
 - Buses - \$120 per day
 - Large SUVs - \$80 per day
 - Small SUVs - \$65 per day
- Lost Key Fee: \$50 replacement fee
- Dirty Vehicle Fee: \$35 cleaning fee (trash left in vehicle, etc.)
- Gas: \$3.75 per gallon upon return

NAME *

Enter Name

PHONE *

000-000-0000

EMAIL *

DIVISION *

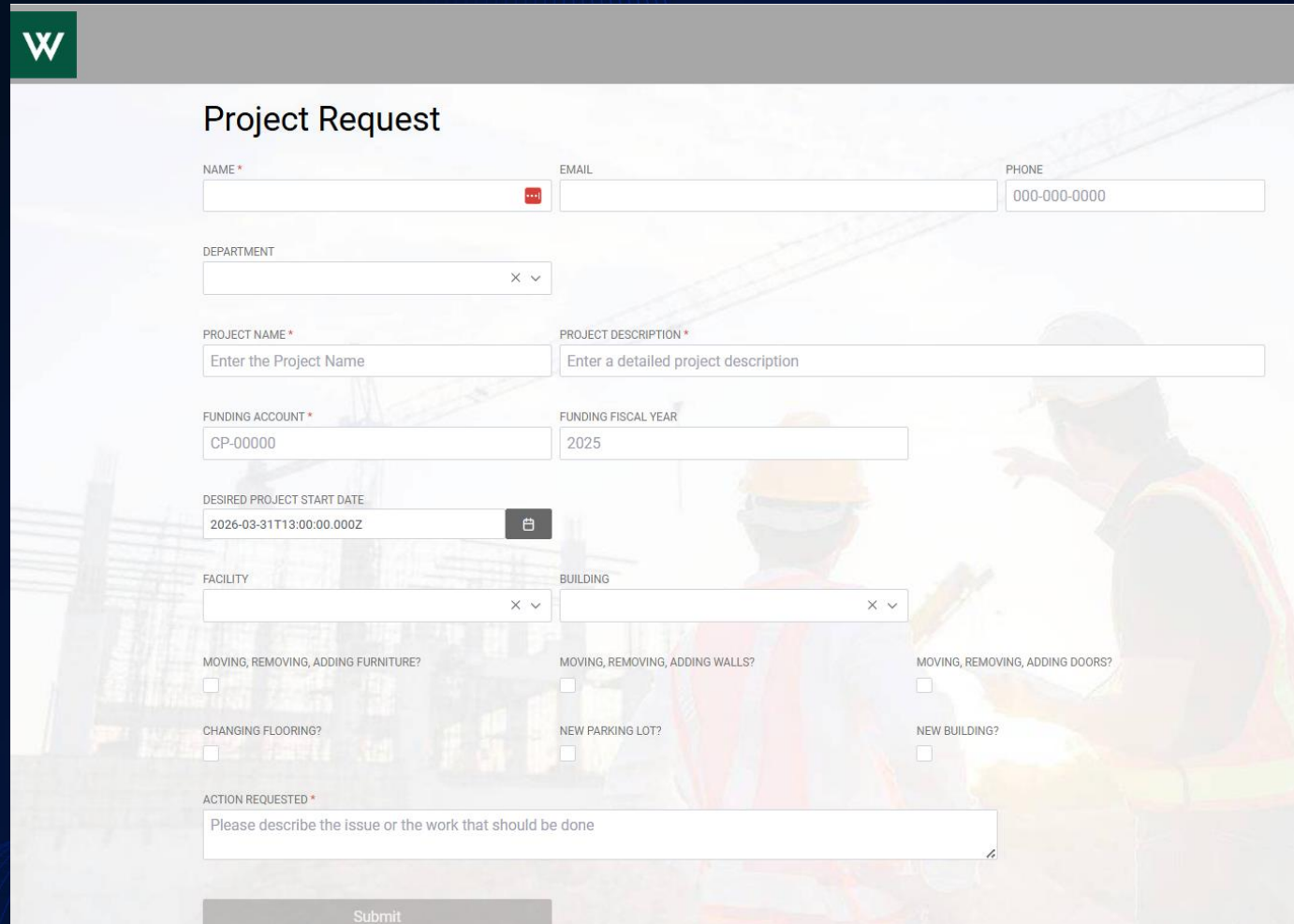
Enter Division

DEPARTMENT *

Department (ex: Math, English, etc.)



Project Request




The screenshot shows a web form titled "Project Request" with a green "W" logo in the top left. The form is set against a background image of two construction workers in hard hats and safety vests reviewing plans on a construction site. The form fields are as follows:

- NAME ***: Text input field with a red "x" icon.
- EMAIL**: Text input field.
- PHONE**: Text input field with the placeholder "000-000-0000".
- DEPARTMENT**: Dropdown menu with an "x" and a downward arrow.
- PROJECT NAME ***: Text input field with the placeholder "Enter the Project Name".
- PROJECT DESCRIPTION ***: Text input field with the placeholder "Enter a detailed project description".
- FUNDING ACCOUNT ***: Text input field with the value "CP-00000".
- FUNDING FISCAL YEAR**: Text input field with the value "2025".
- DESIRED PROJECT START DATE**: Text input field with the value "2026-03-31T13:00:00.000Z" and a calendar icon.
- FACILITY**: Dropdown menu with an "x" and a downward arrow.
- BUILDING**: Dropdown menu with an "x" and a downward arrow.
- MOVING, REMOVING, ADDING FURNITURE?**: Checkbox.
- MOVING, REMOVING, ADDING WALLS?**: Checkbox.
- MOVING, REMOVING, ADDING DOORS?**: Checkbox.
- CHANGING FLOORING?**: Checkbox.
- NEW PARKING LOT?**: Checkbox.
- NEW BUILDING?**: Checkbox.
- ACTION REQUESTED ***: Text input field with the placeholder "Please describe the issue or the work that should be done".
- Submit**: A grey button at the bottom center.



Material Request



Submit Material Request

DEPARTMENT *

×

▼

Please select a department



NAME *

...

EMAIL

DELIVERY NOTES

PARTS *

	04275R-001 Ajax Oxygen Bleach Cleanser	COST 10.00	EA 3	<div>↑</div> <div>↓</div>	<div>🗑️</div>
	100000A-001 V Belt, Nominal Outside Length 22 Inches, Top Width 1/2 Inch, Belt 4M, 5/16 Inch Thick, Smooth	COST 35.00	EA 1	<div>↑</div> <div>↓</div>	<div>🗑️</div>

Add Parts

Submit



Hands Up! Polling Question

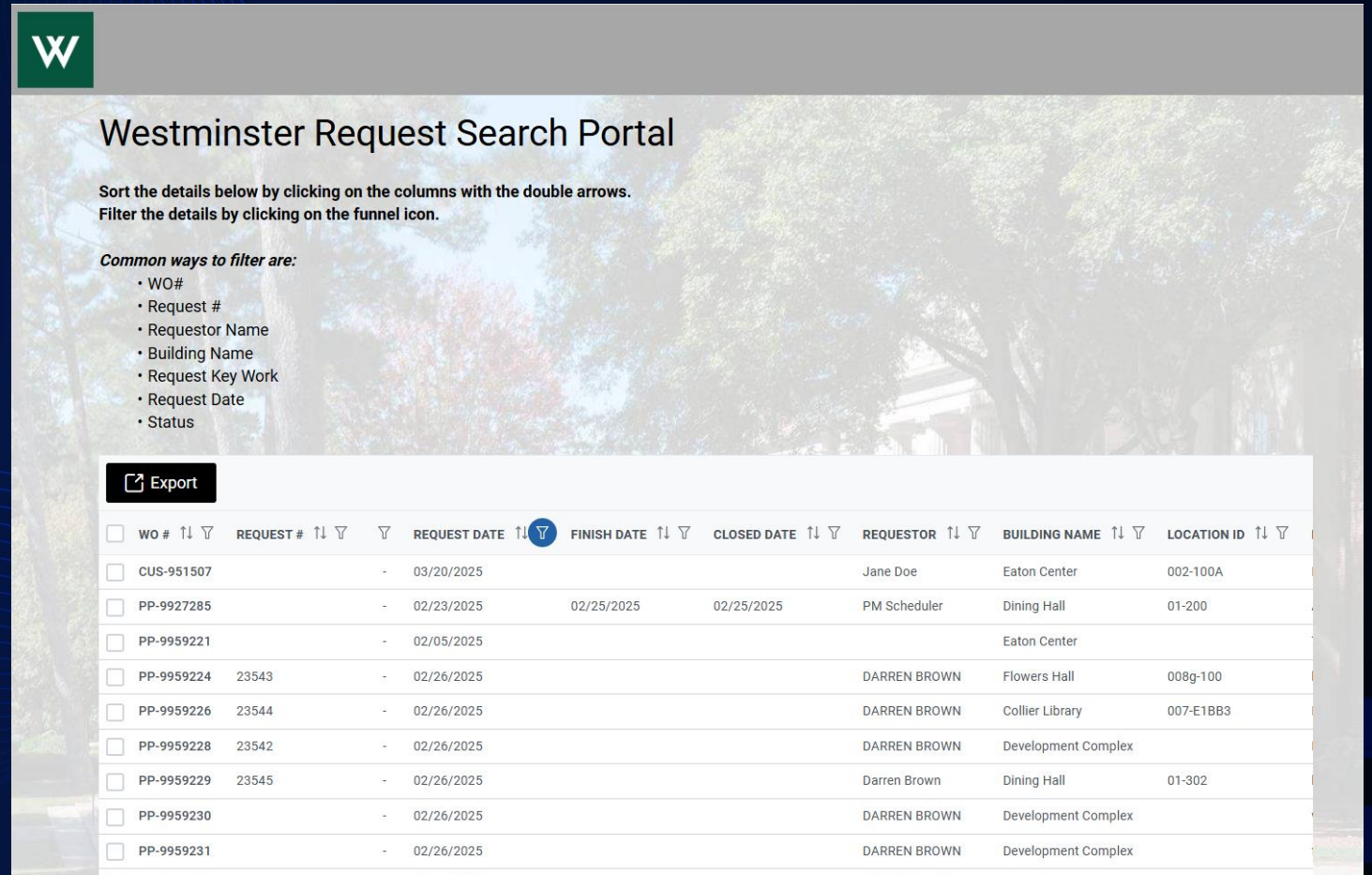
How many in the audience have at least some requestors that login to WebTMA to check the status of their requests?



SRP Search Portal – Anonymous Access

Allows anonymous users to search:

- WO #
- Request #
- Requestor
- Request
- Building Name
- Location ID
- Request Date
- Etc.



<input type="checkbox"/> WO #	<input type="checkbox"/> REQUEST #	<input type="checkbox"/> REQUEST DATE	<input type="checkbox"/> FINISH DATE	<input type="checkbox"/> CLOSED DATE	<input type="checkbox"/> REQUESTOR	<input type="checkbox"/> BUILDING NAME	<input type="checkbox"/> LOCATION ID
<input type="checkbox"/> CUS-951507	-	03/20/2025			Jane Doe	Eaton Center	002-100A
<input type="checkbox"/> PP-9927285	-	02/23/2025	02/25/2025	02/25/2025	PM Scheduler	Dining Hall	01-200
<input type="checkbox"/> PP-9959221	-	02/05/2025				Eaton Center	
<input type="checkbox"/> PP-9959224	23543	-	02/26/2025		DARREN BROWN	Flowers Hall	008g-100
<input type="checkbox"/> PP-9959226	23544	-	02/26/2025		DARREN BROWN	Collier Library	007-E1BB3
<input type="checkbox"/> PP-9959228	23542	-	02/26/2025		DARREN BROWN	Development Complex	
<input type="checkbox"/> PP-9959229	23545	-	02/26/2025		Darren Brown	Dining Hall	01-302
<input type="checkbox"/> PP-9959230	-	02/26/2025			DARREN BROWN	Development Complex	
<input type="checkbox"/> PP-9959231	-	02/26/2025			DARREN BROWN	Development Complex	

SRP Login Types – SSO Login



SRP Login Types – SSO Config

User Access Form

☒ Allow anonymous access

Select the user account that will be used for data access

Select a User

☒ SSO will be required for anonymous users

Select the SSO Login page that will be used for SSO access

Westminster

Cancel

Update Access



SRP Login Types – Anonymous

User Access Form

☒ Allow anonymous access

Select the user account that will be used for data access

Jane Doe

X

▼

☐ SSO will be required for anonymous users


Select the SSO Login page that will be used for SSO access

Select

▼

Cancel

Update Access

Active	<input checked="" type="checkbox"/>
Login ID	UC25SR
Password	*****
Sales Person	
URL Login	<input checked="" type="checkbox"/>
Locked Out	<input type="checkbox"/>
Force Password Change	<input type="checkbox"/>
Preferred Language	
WebTMA GO	<input checked="" type="checkbox"/>
mobileTMA	<input checked="" type="checkbox"/>
CellularTMA	<input type="checkbox"/>
Mobile Access Only	<input type="checkbox"/>
Mobile General Inspections	<input type="checkbox"/>
Anonymous Access Only	<input checked="" type="checkbox"/> 





Thank You / Q&A

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tmasystems.com

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