TMASYSTEMS

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.

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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.

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Agenda

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

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Hands Up! Polling Question

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

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Hands Up! Polling Question

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

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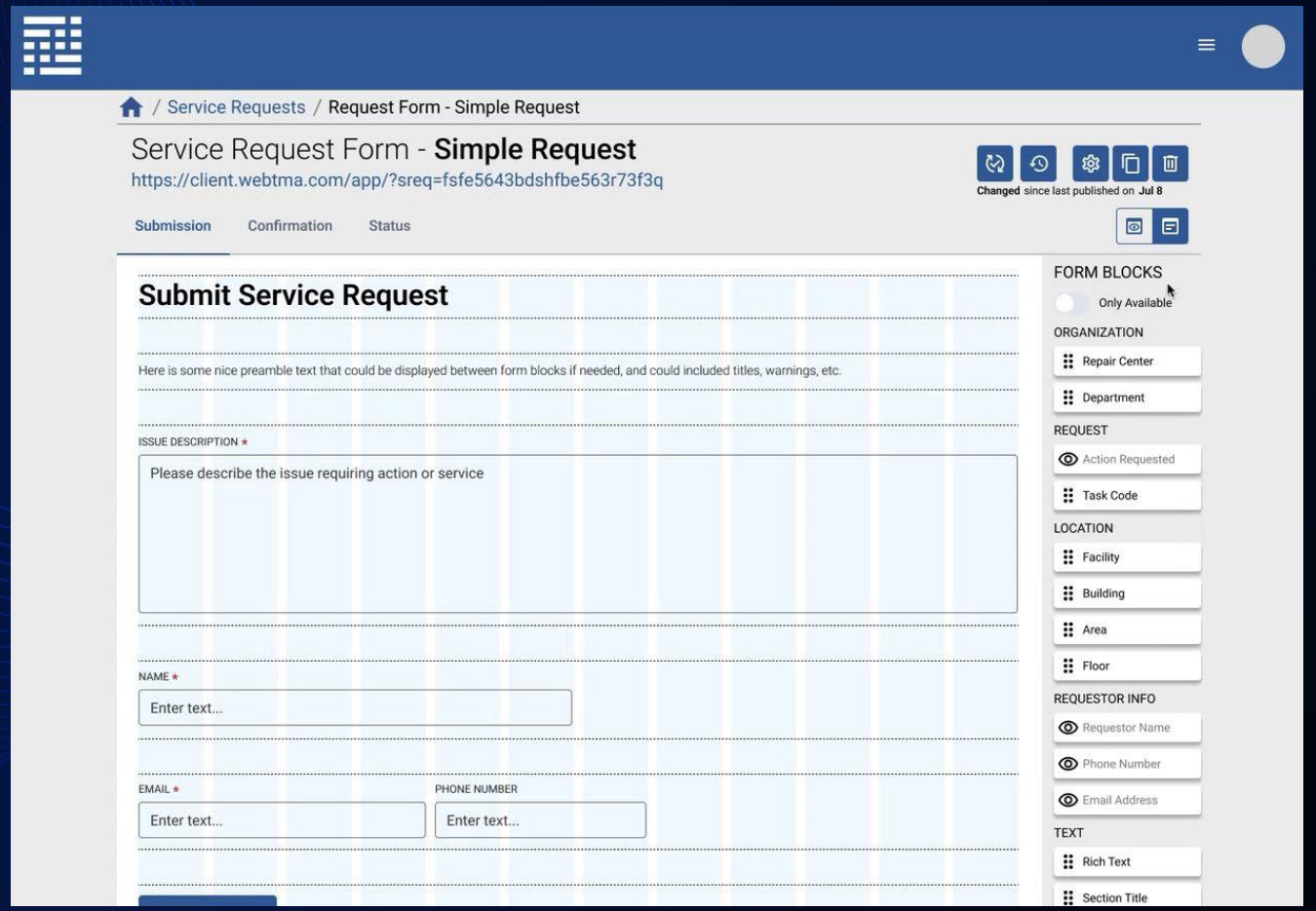
Service Request Portal

- 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



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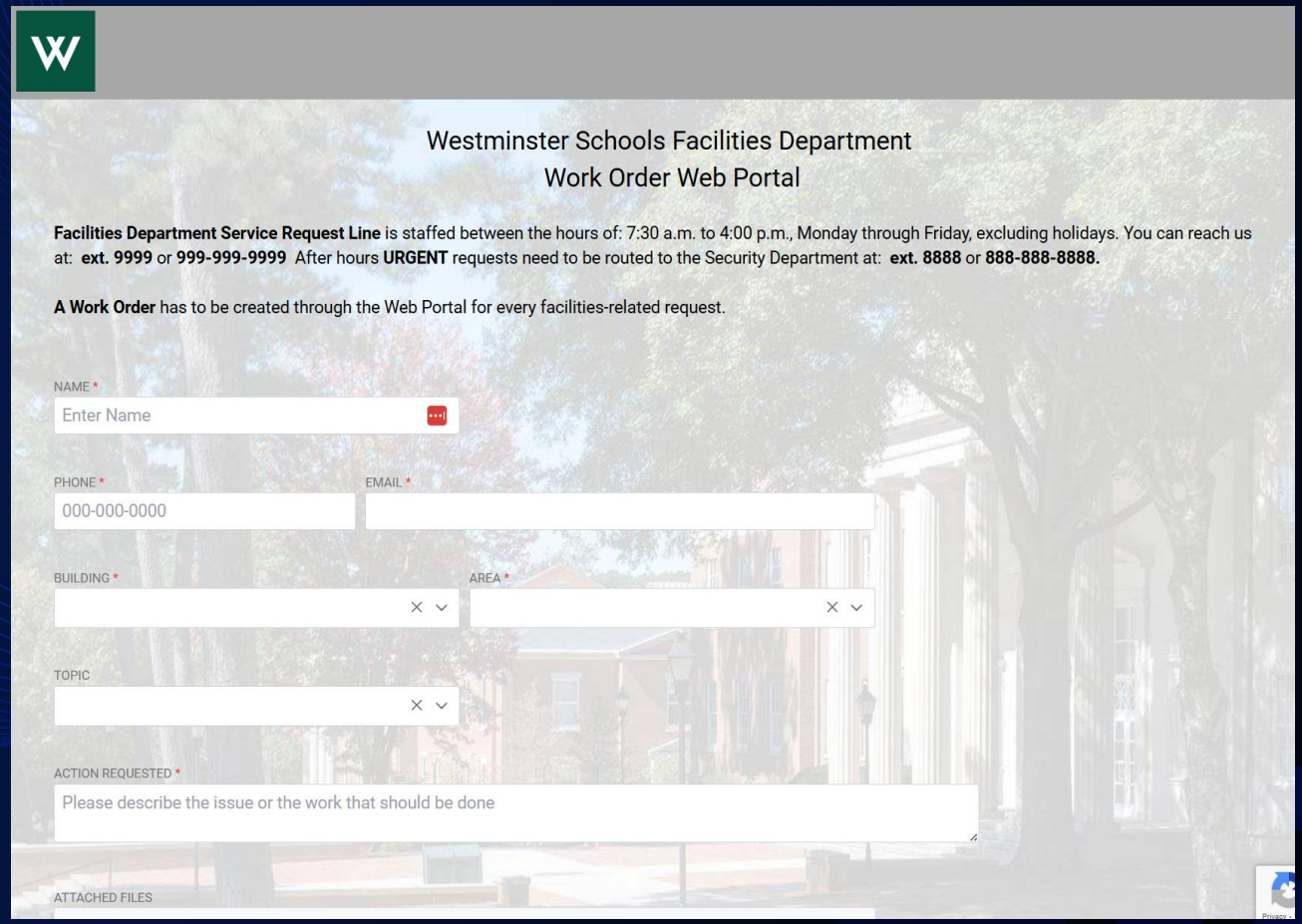
Features and Capabilities

- 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



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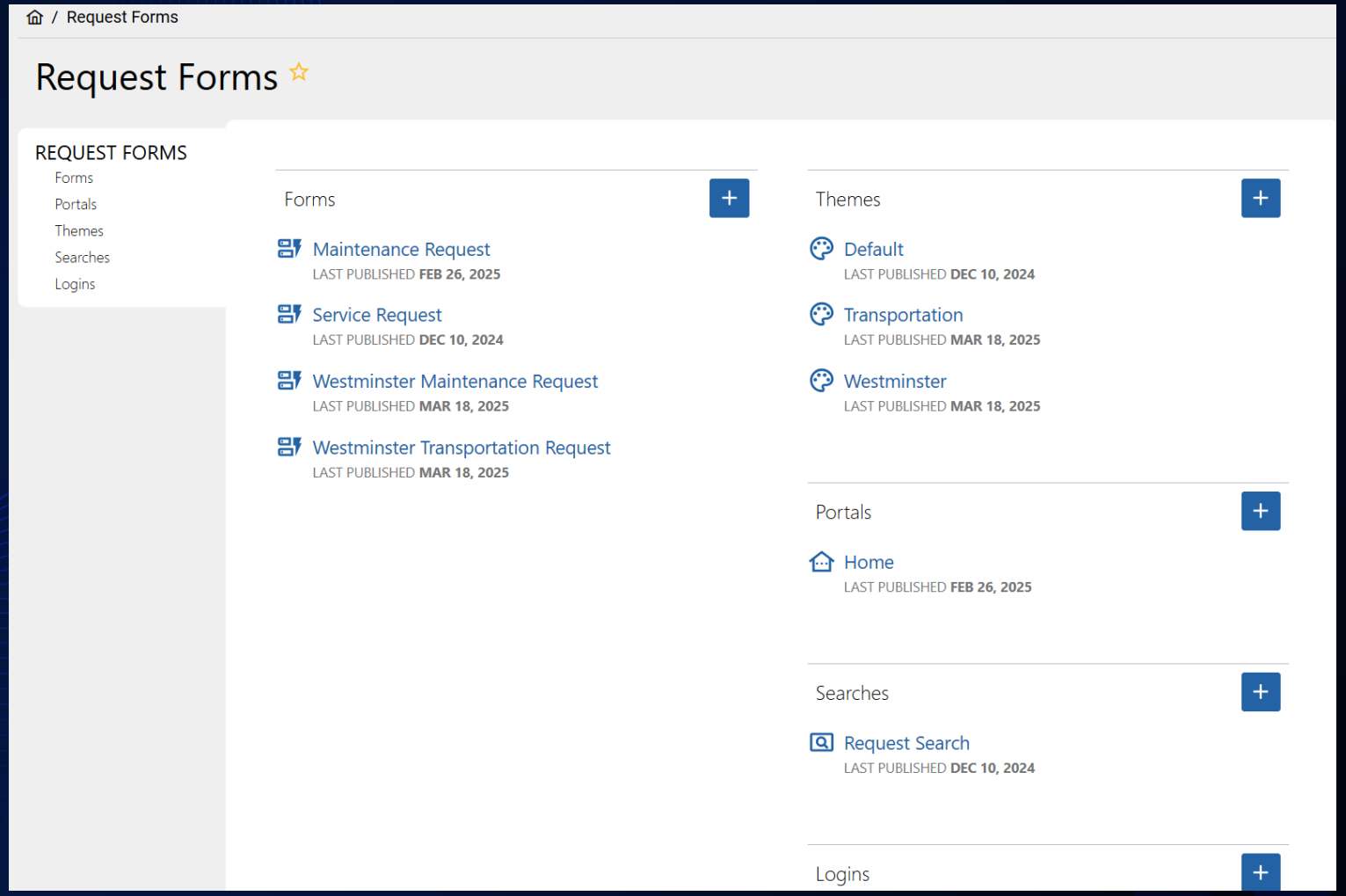
SRP Components

- Themes
- Forms
- Portals
- Searches
- Logins



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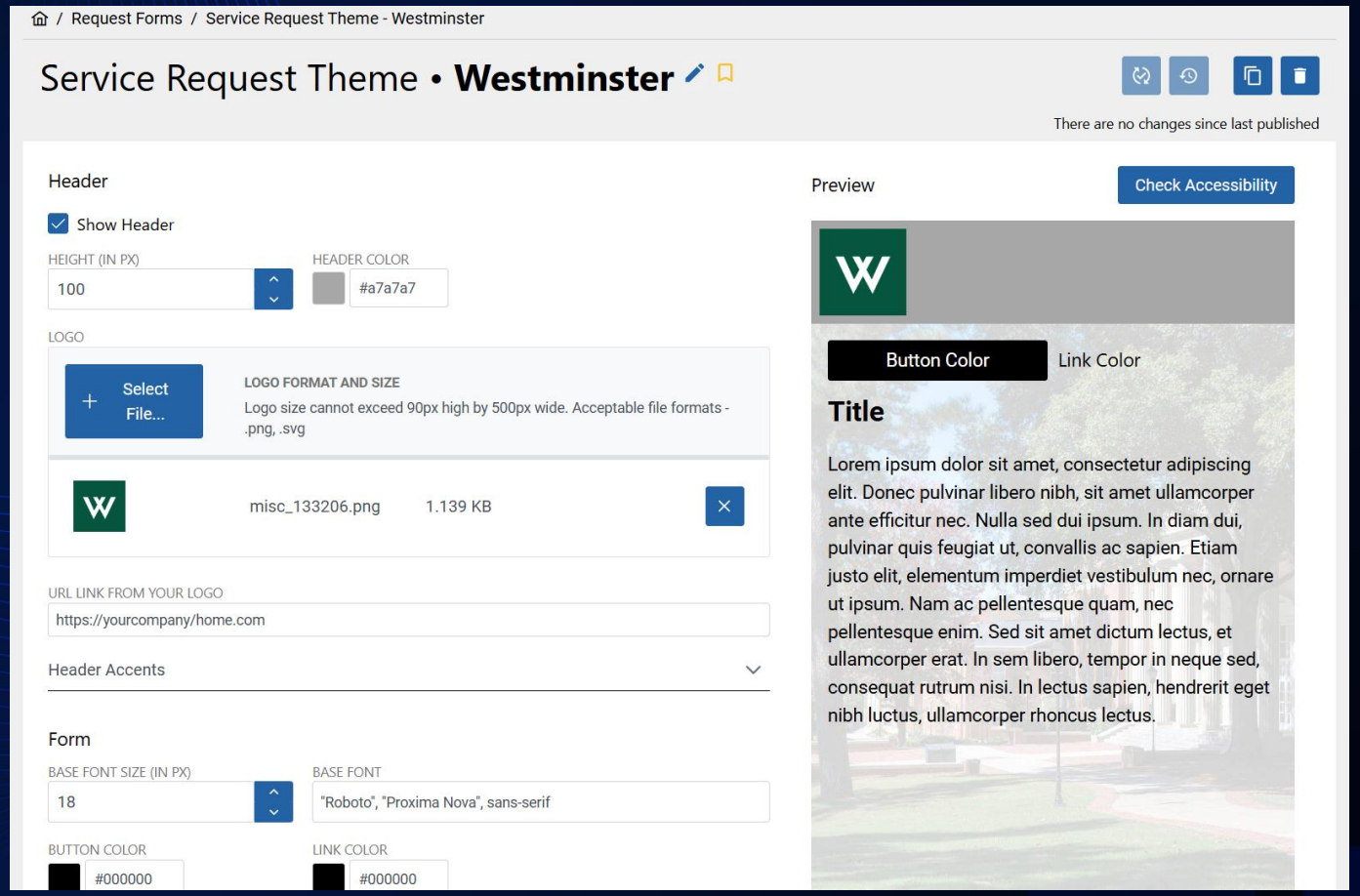
SRP Themes – Standardization

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



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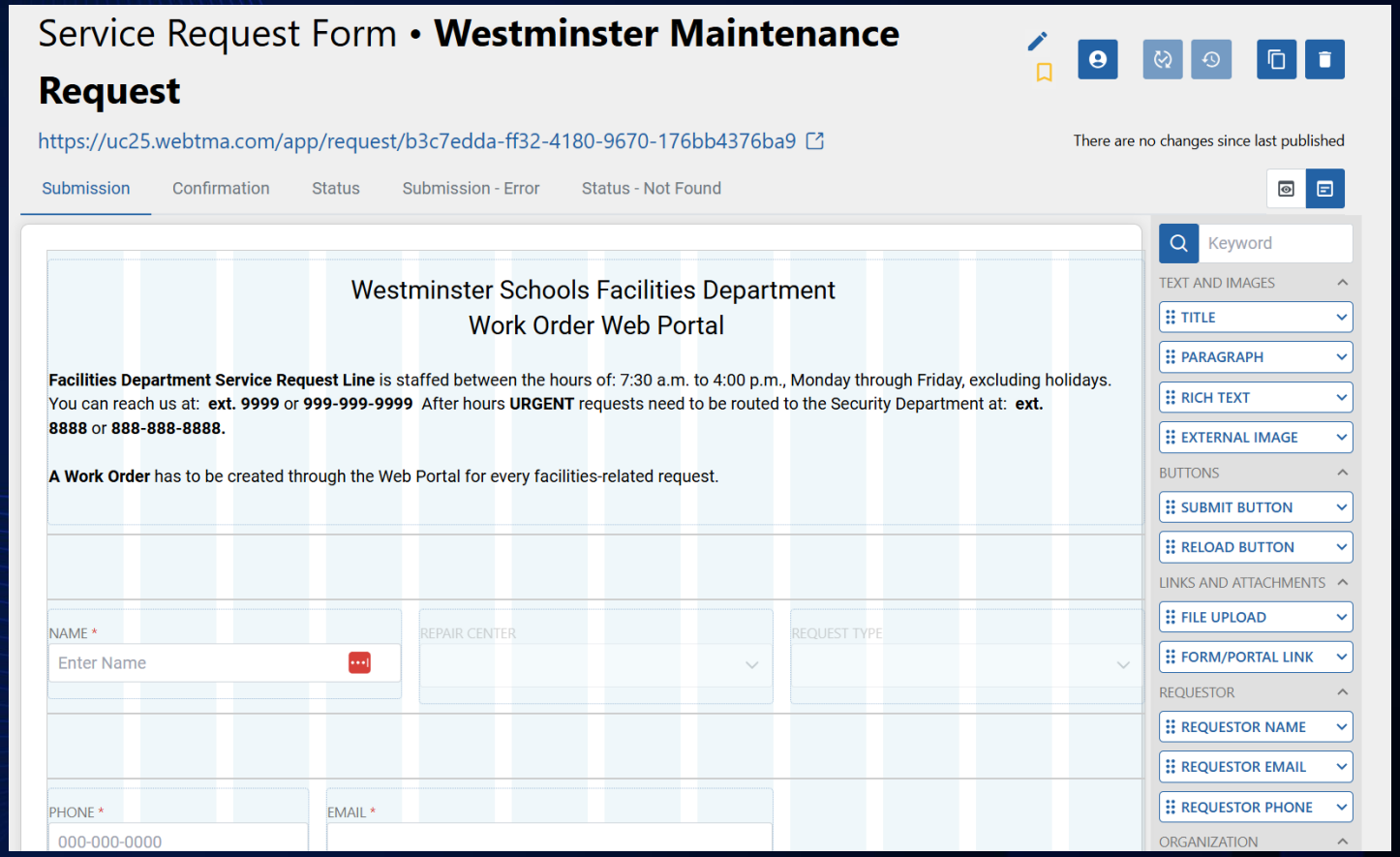
SRP Forms

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



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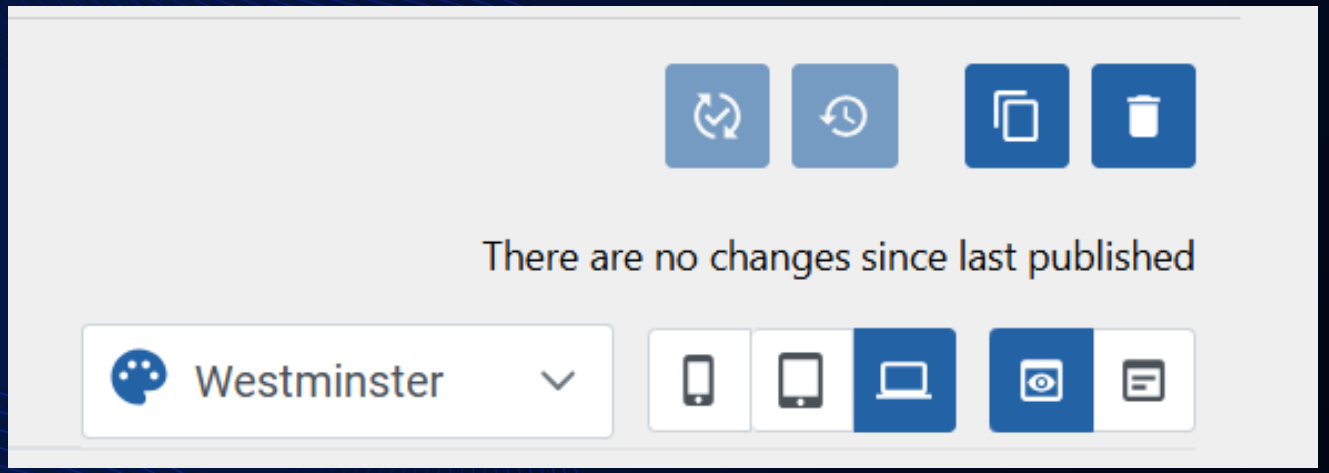
SRP Forms – Preview Layouts

Preview Layouts for 3 formats:

- Laptop/Computer
- Tablet
- Mobile



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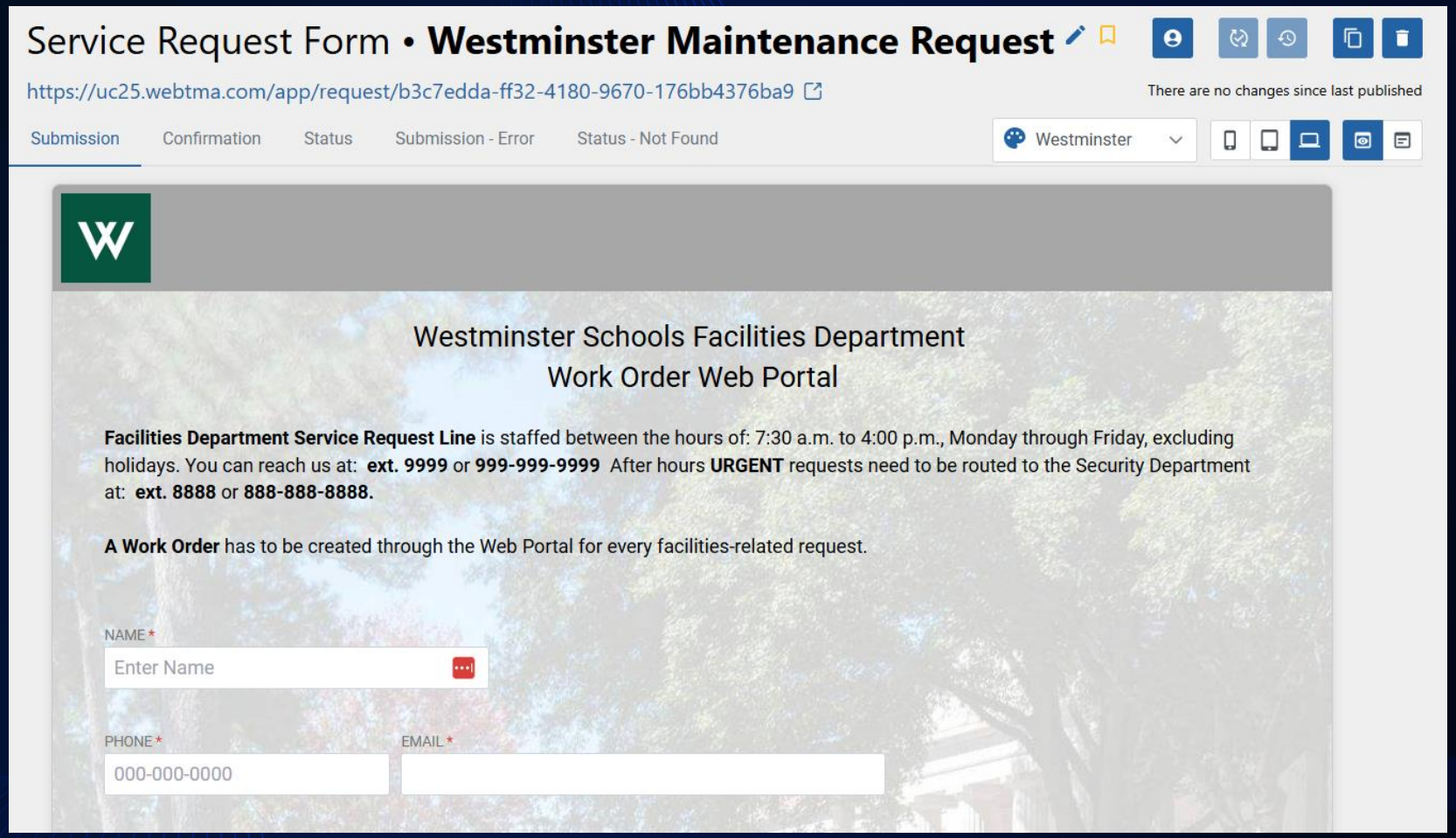
SRP Forms – Laptop Layout



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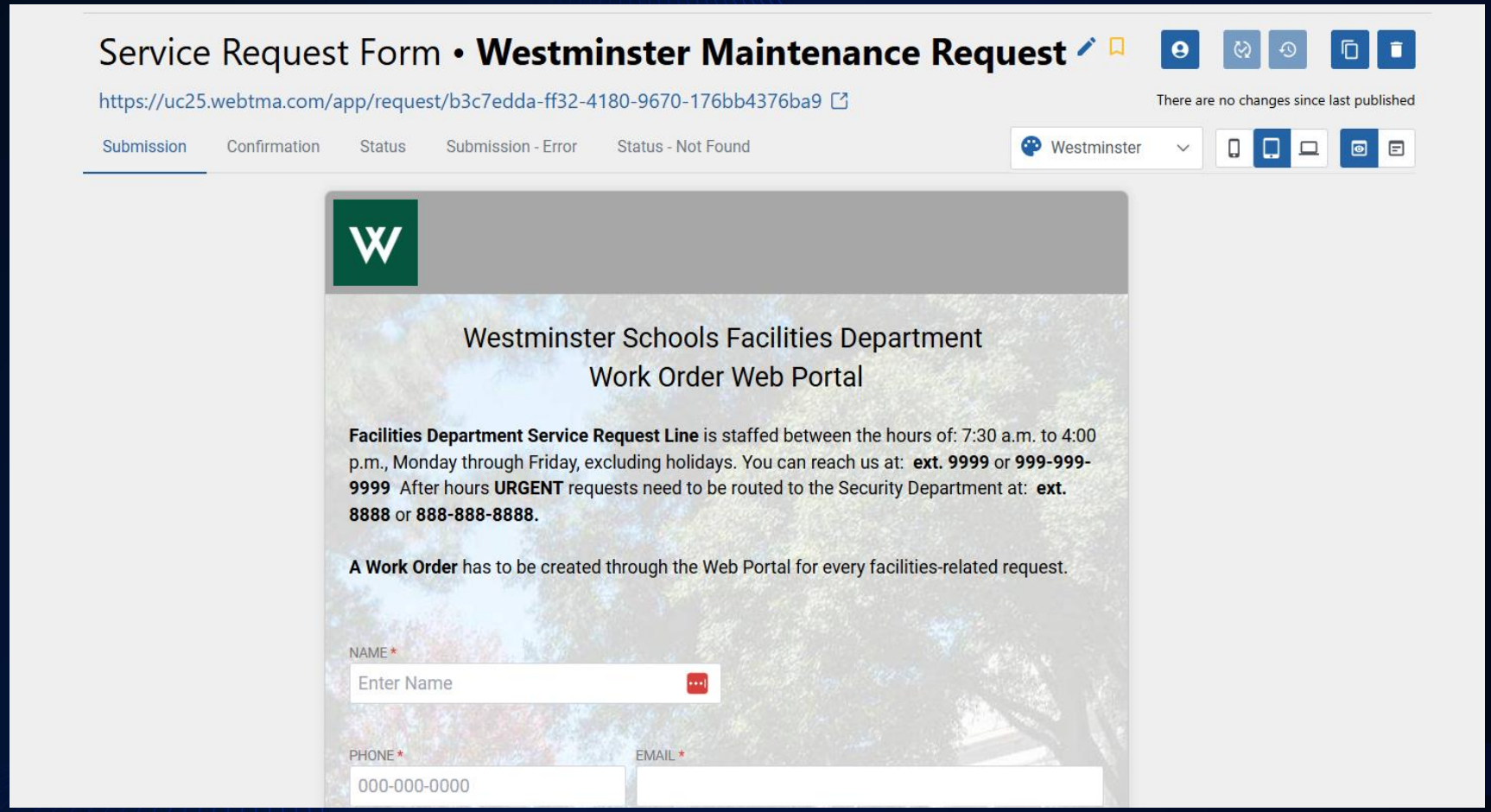
SRP Forms – Tablet Layout



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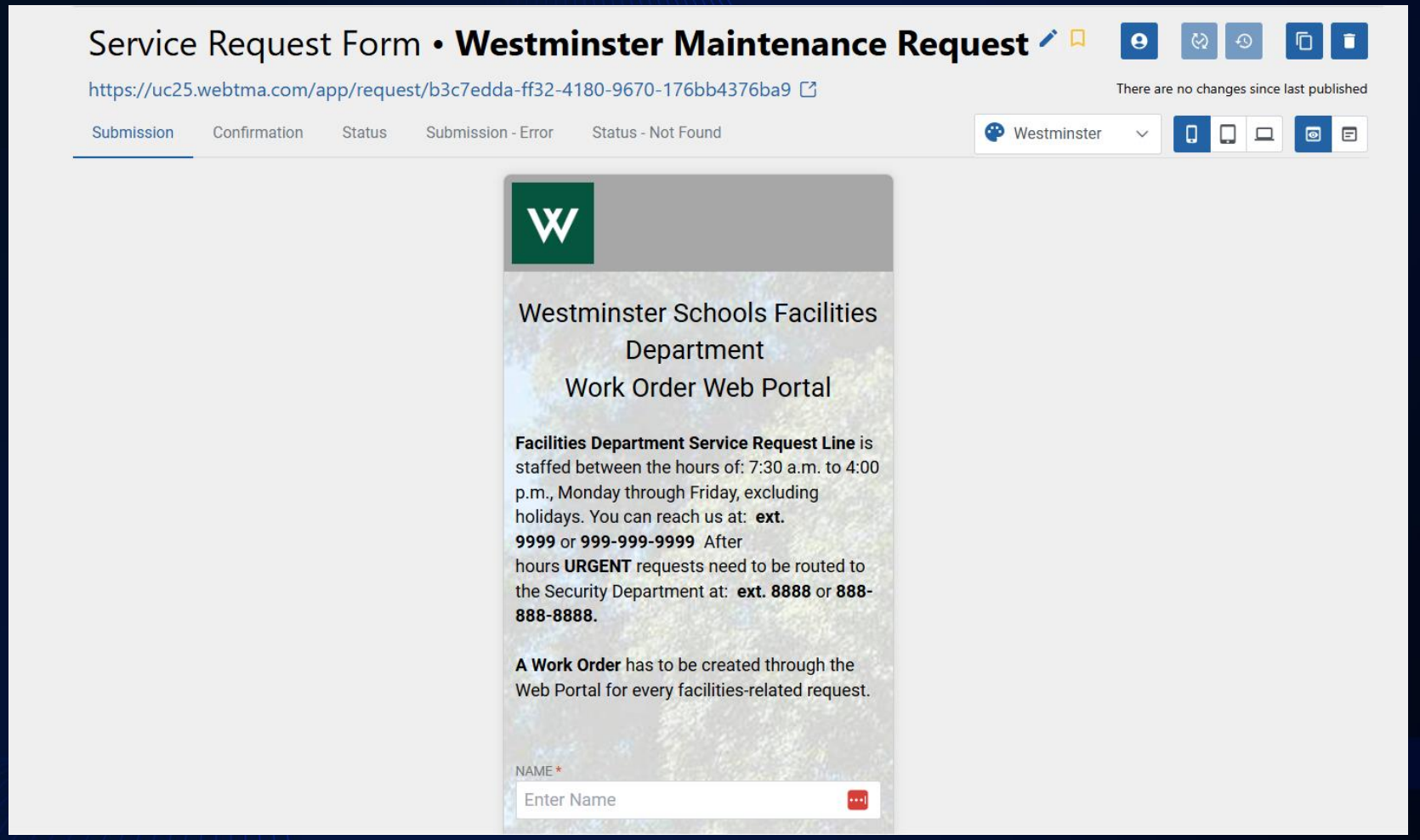
SRP Forms – Mobile Layout



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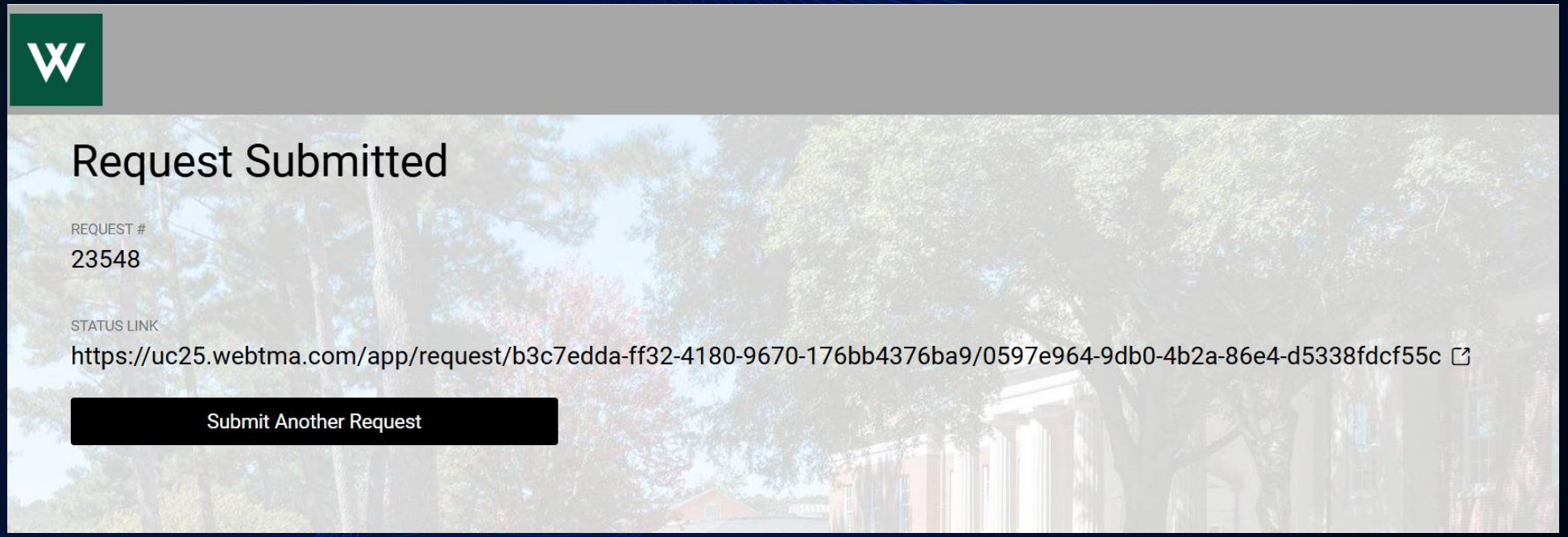
SRP Forms – Confirmation Design



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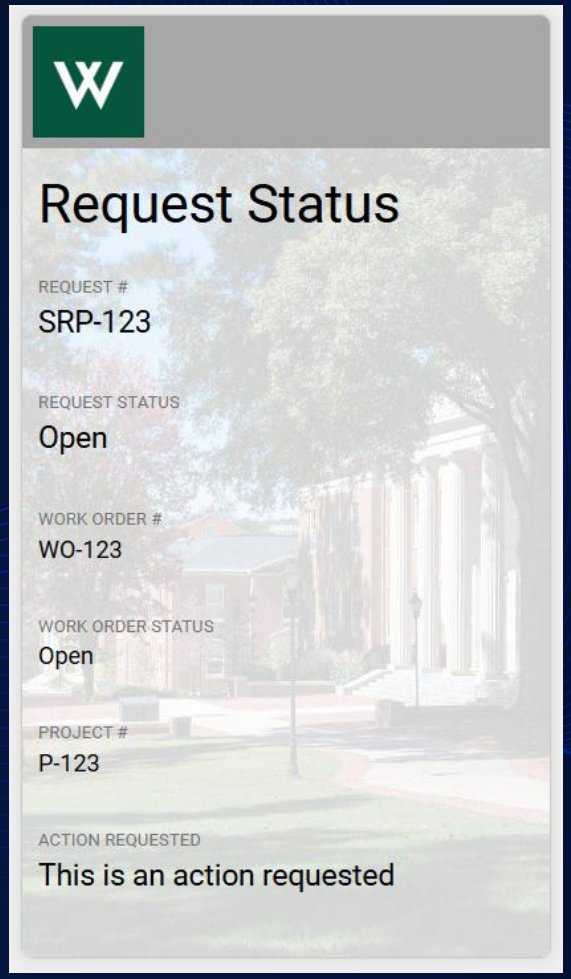
SRP Forms – Status Design



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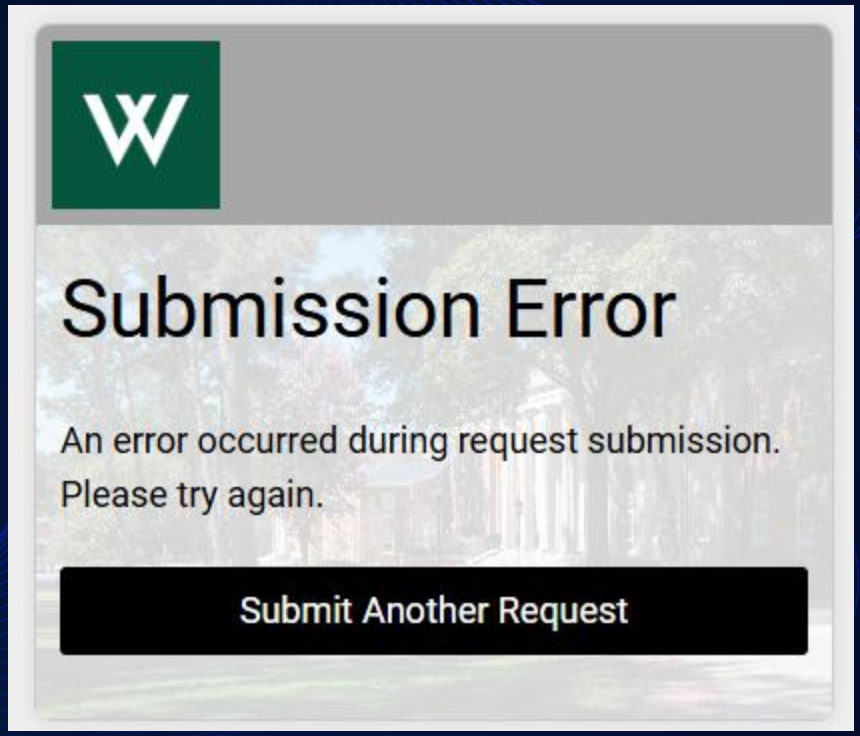
SRP Forms – Error Message Design



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Hands Up! Polling Question

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

- Maintenance
- Res Life
- Materials
- Etc.

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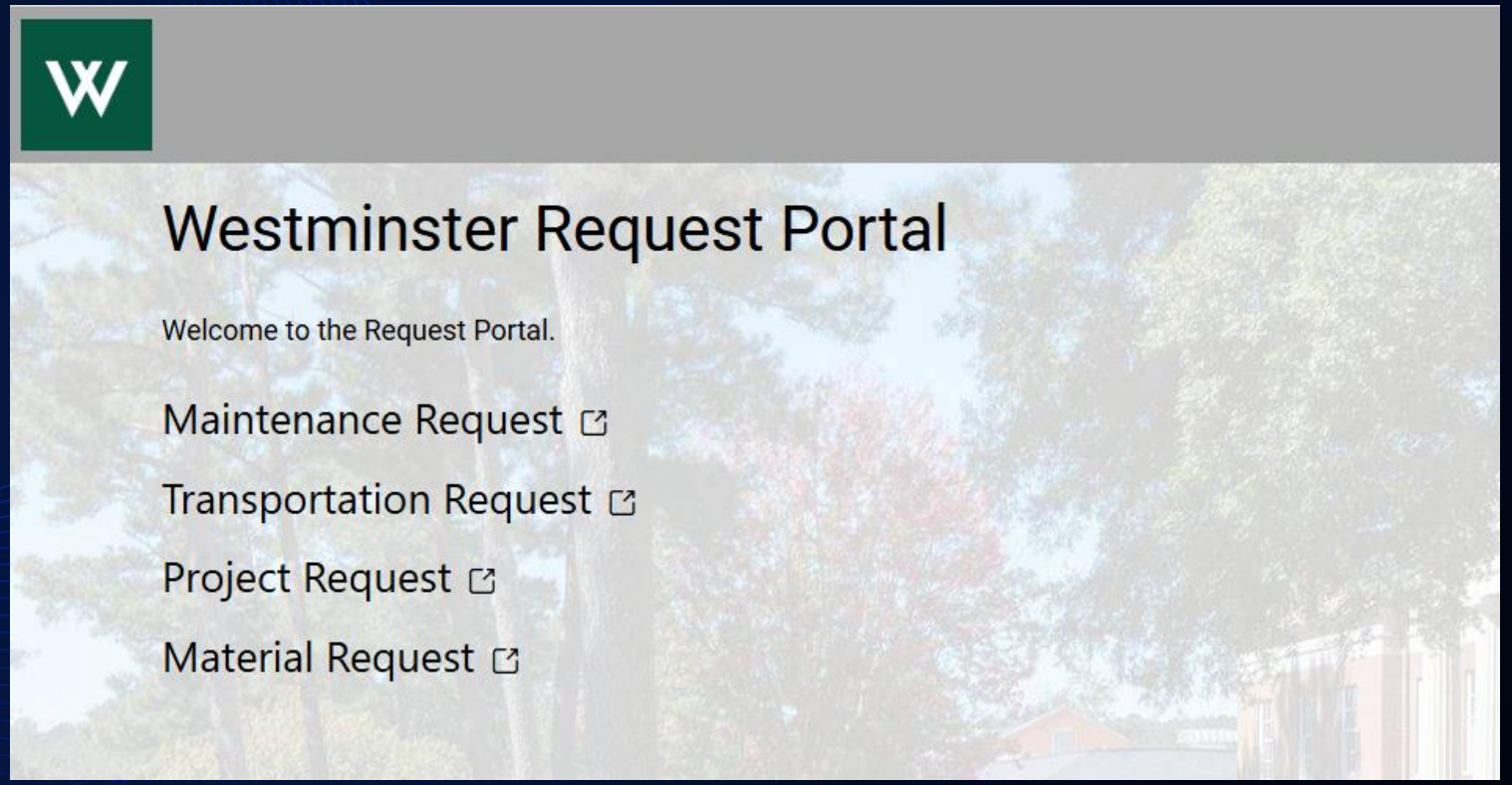
SRP Portal

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.



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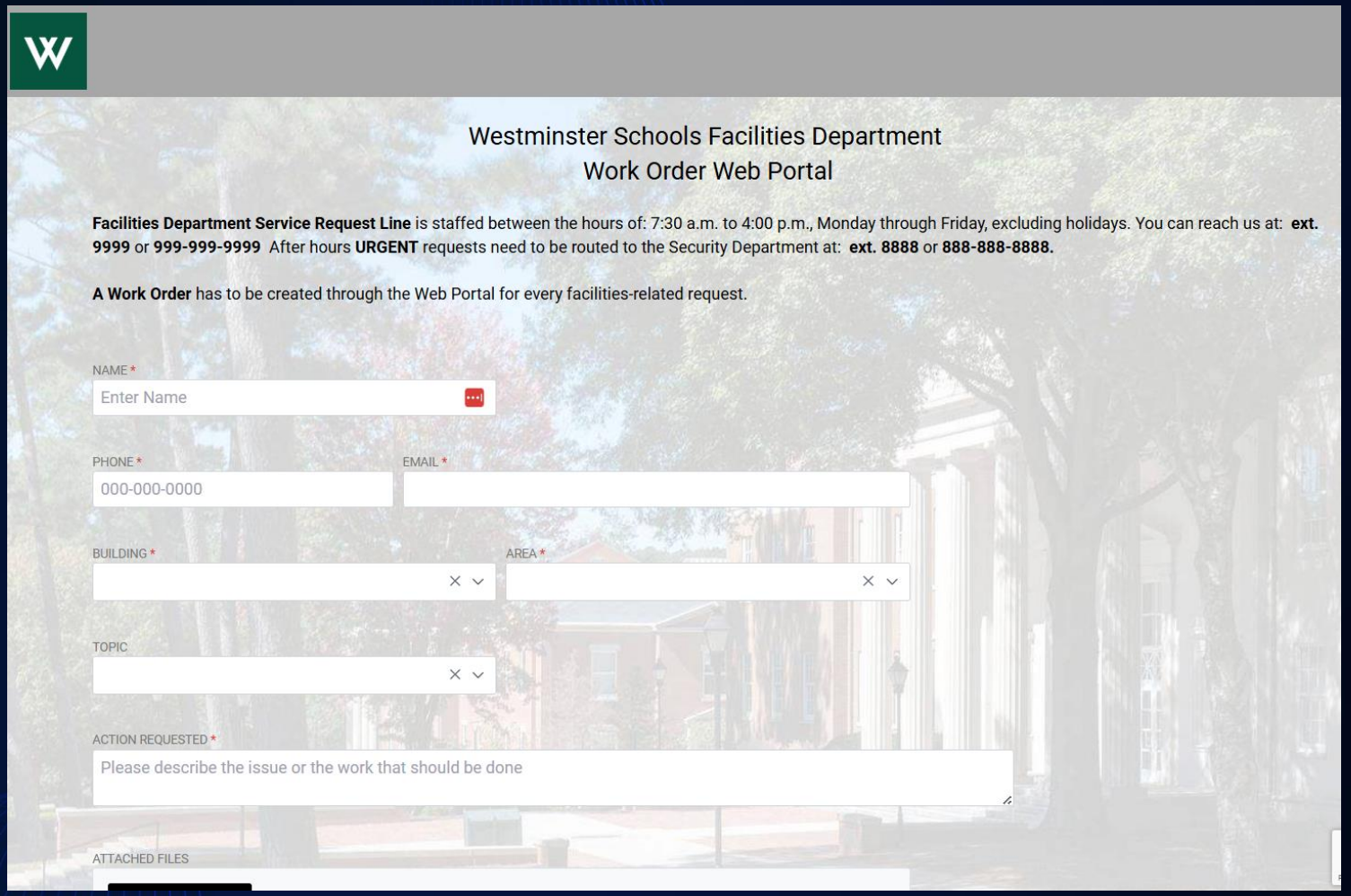
Maintenance Request



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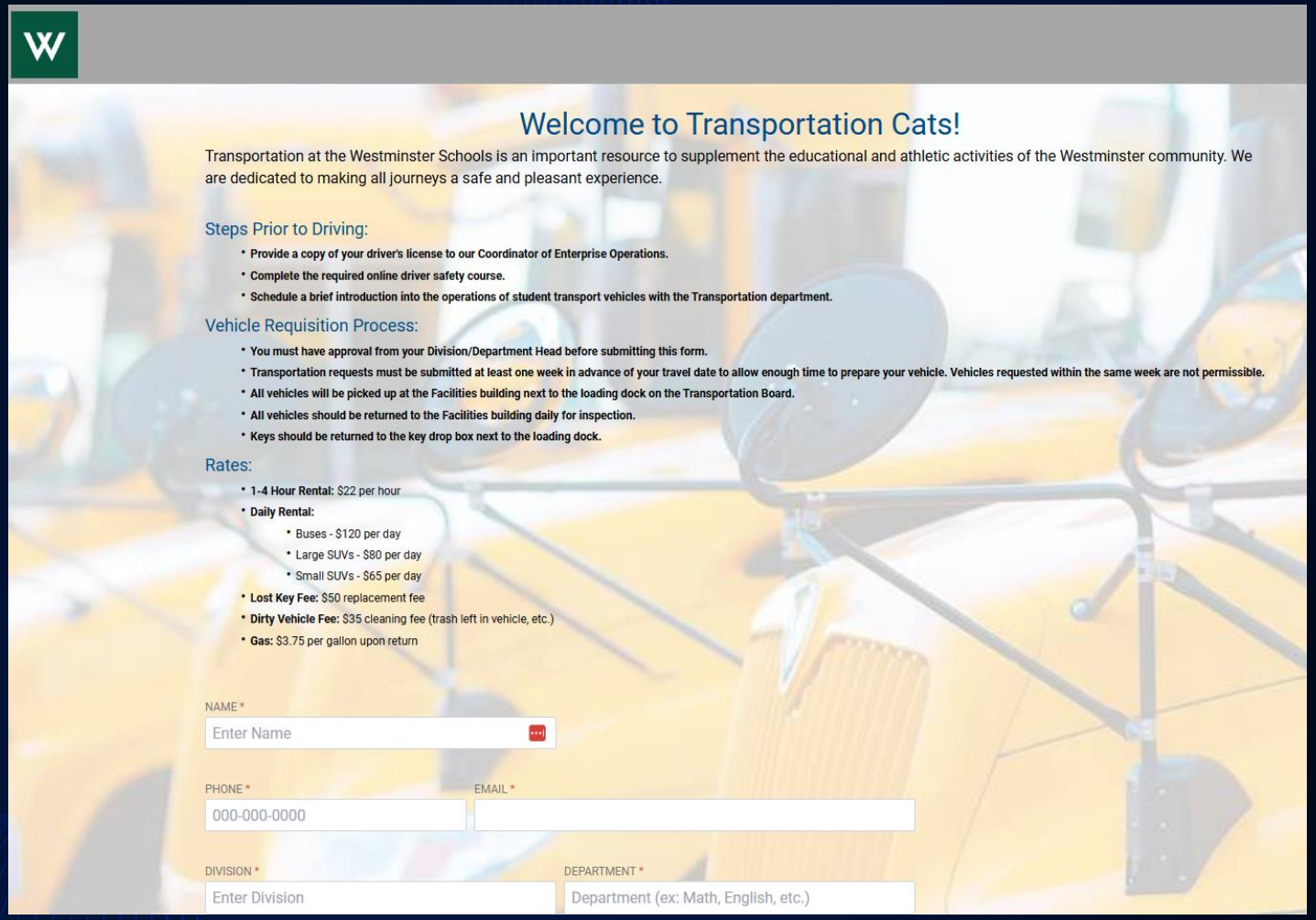
Transportation Request



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.)

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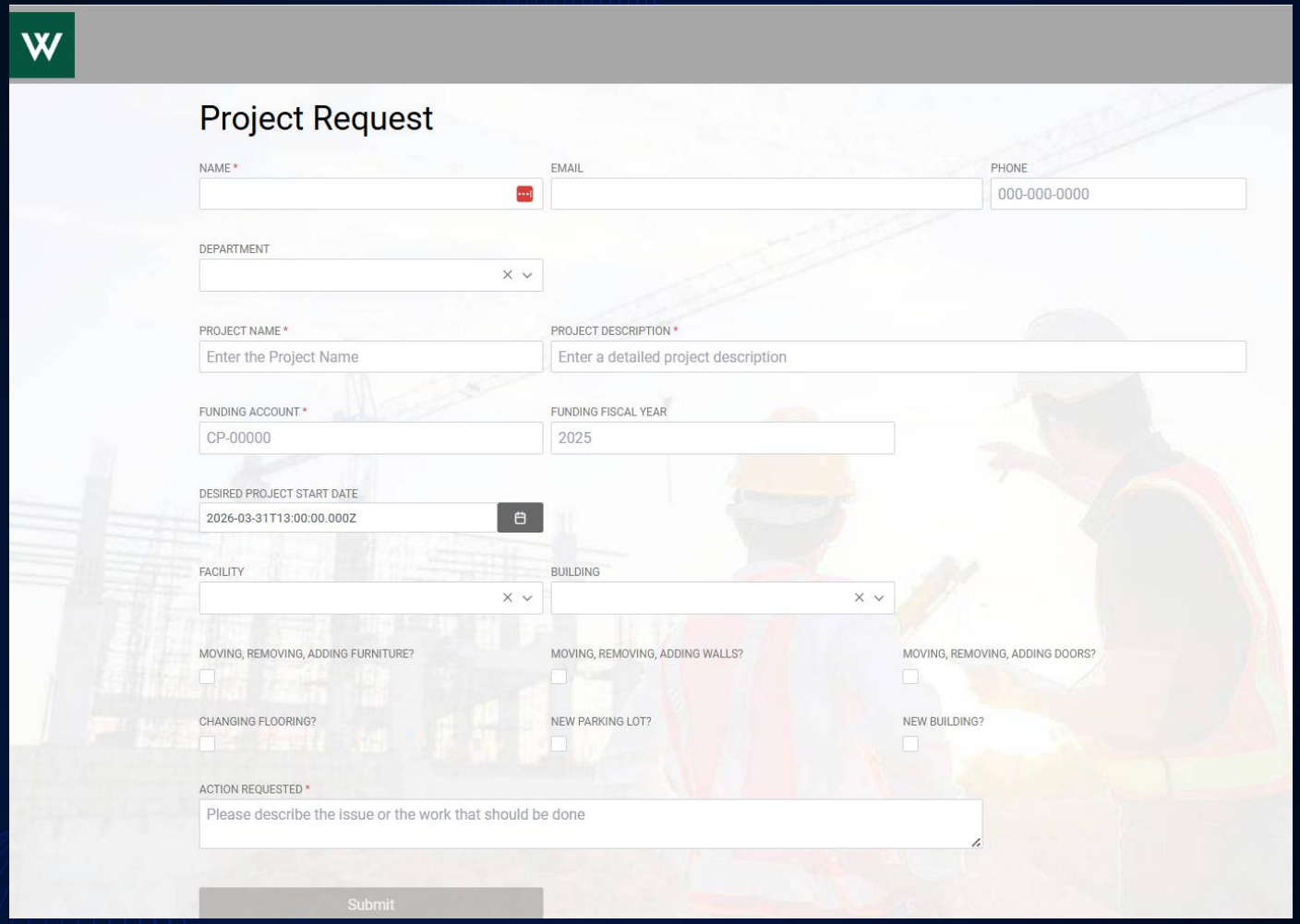
Project Request



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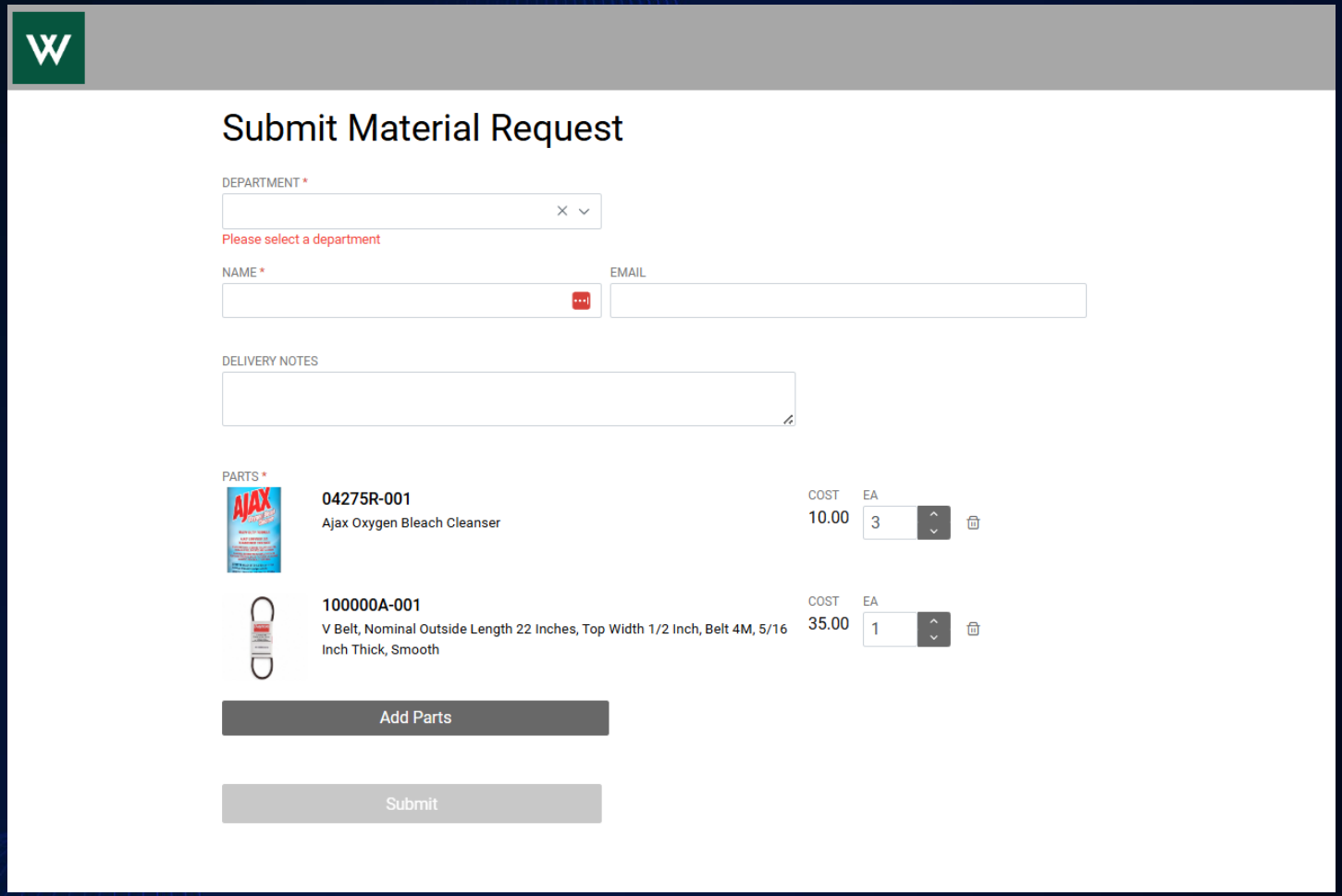
Material Request



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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?

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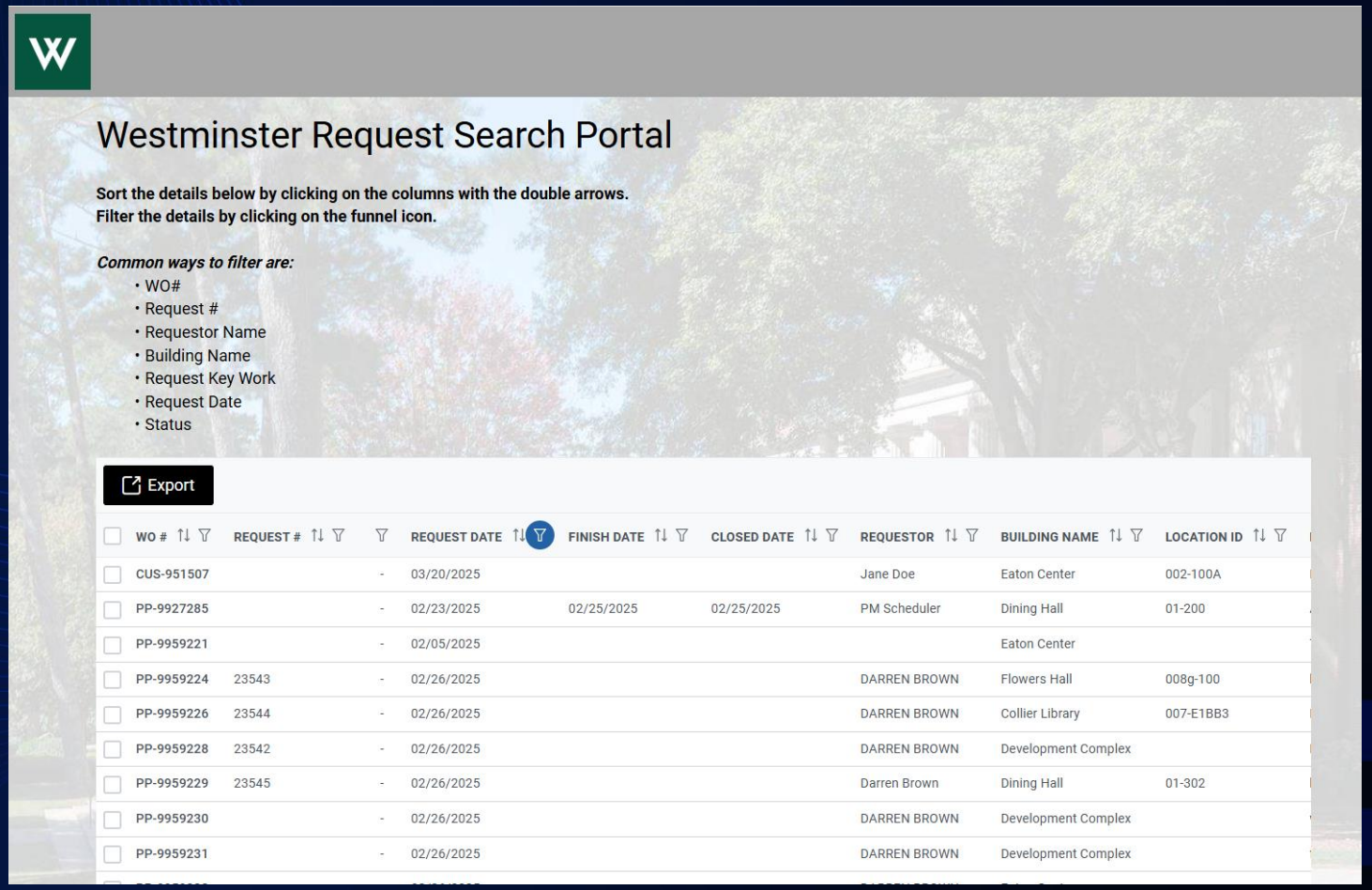
SRP Search Portal – Anonymous Access

Allows anonymous users to search:

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



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SRP Login Types – SSO Login

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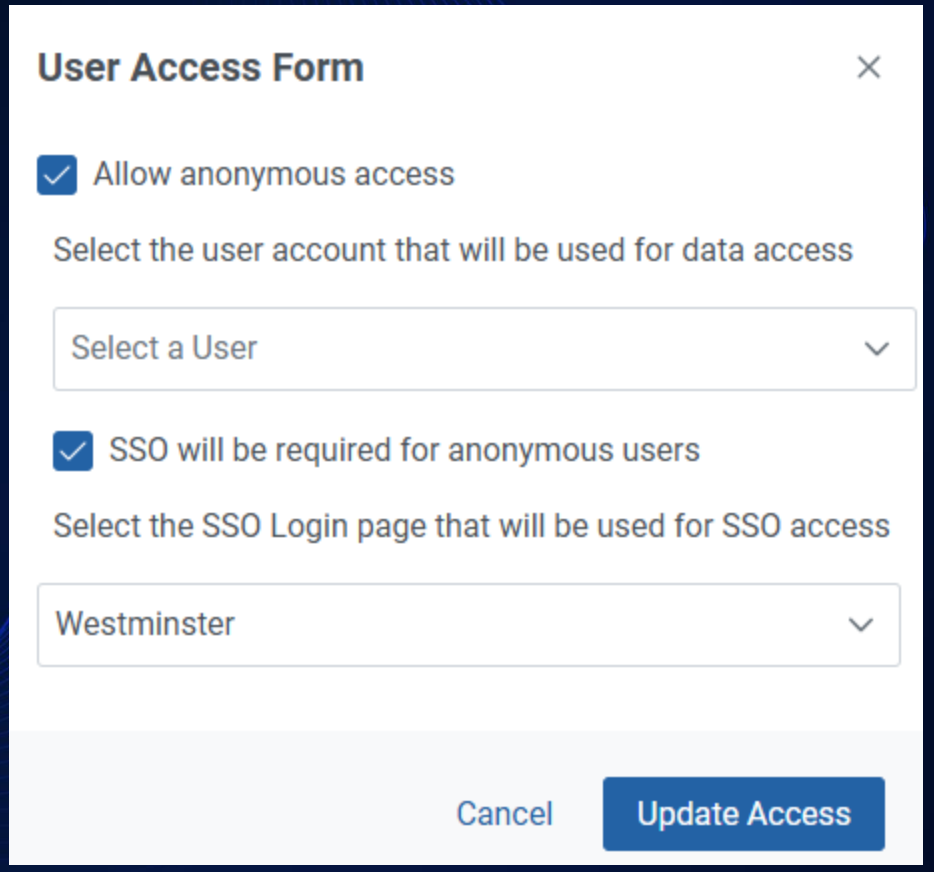
SRP Login Types – SSO Config



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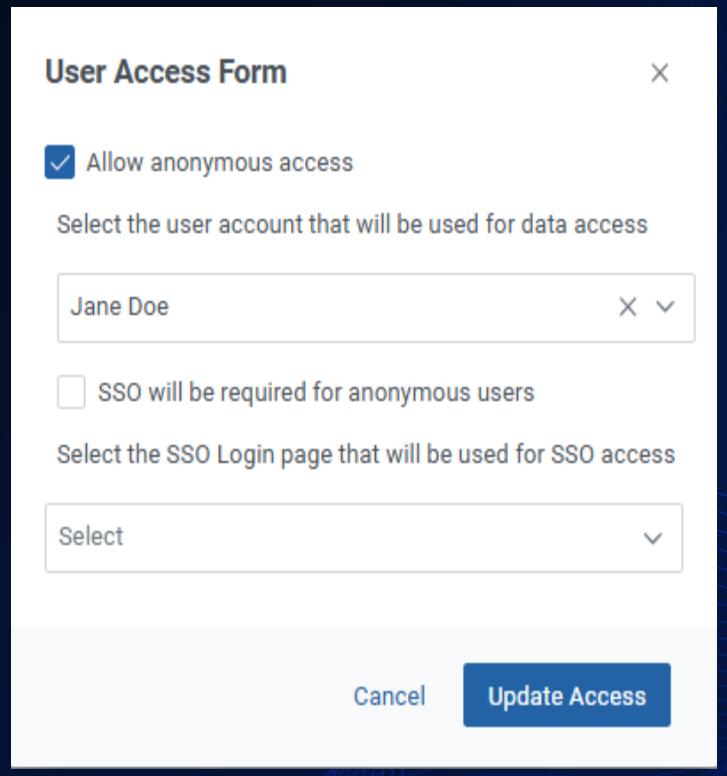
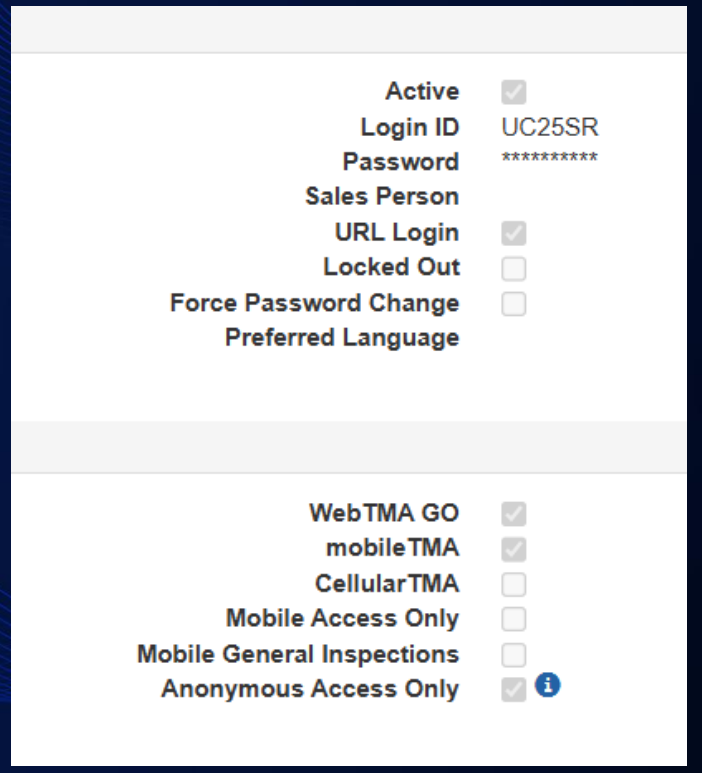
SRP Login Types – Anonymous





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Thank You / Q&A

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