



UC25 | April 8th - 10th 2025

Taking Care of Business:

User Friendly Request Processing
with the New Service Request Portal





Tim Prado

Senior Consultant

Tim.prado@tmasystems.com

—

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.



© 2025 TMA SYSTEMS, LLC



Tammy Neal

Senior Consultant, TMA Systems

Tammy.neal@tmasystems.com

—

About Me: Seasoned Senior Consultant with 16 years of experience at TMA Systems focusing on WebTMA implementation and optimizing workflows.



© 2025 TMA SYSTEMS, LLC

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?



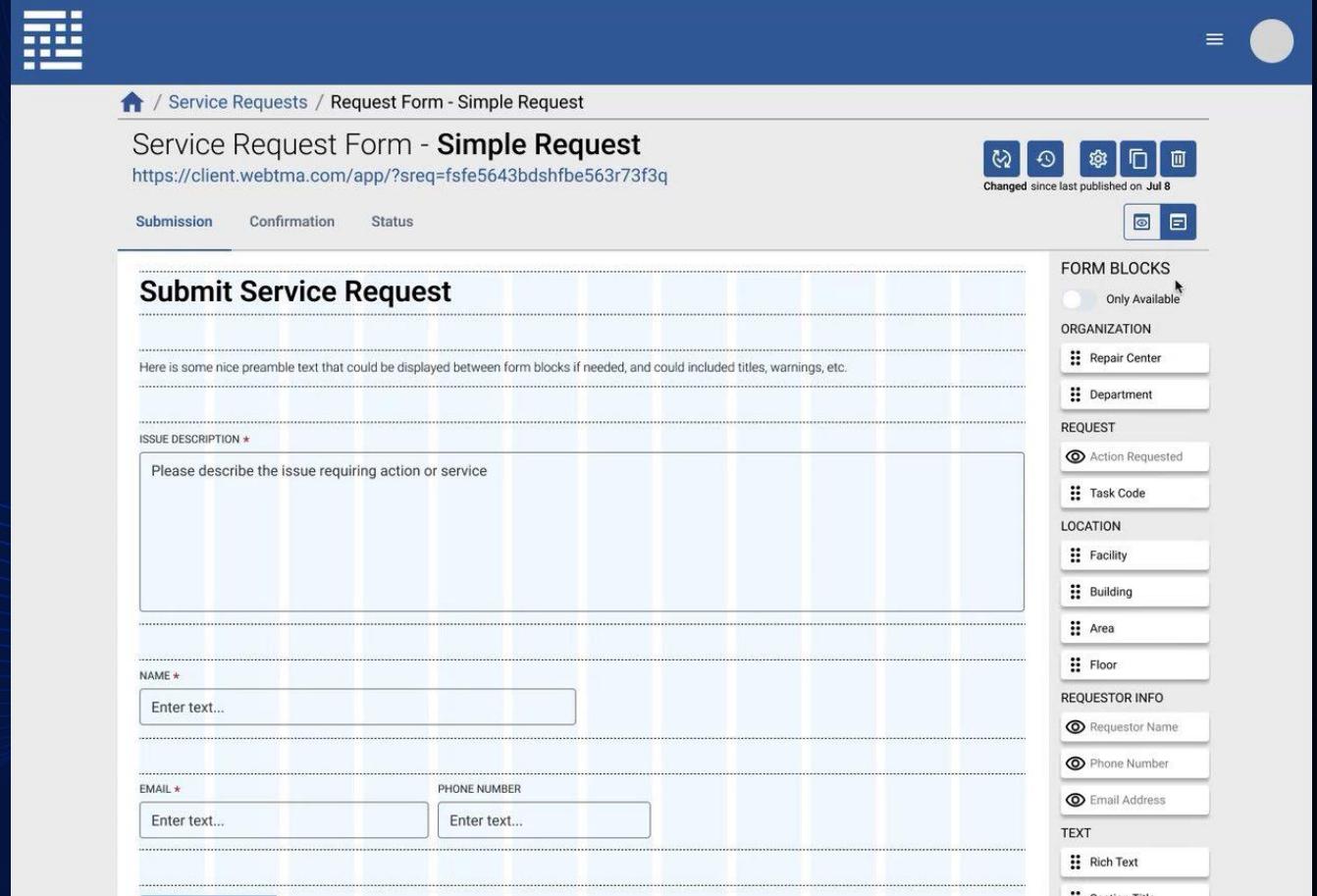
Hands Up! Polling Question

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

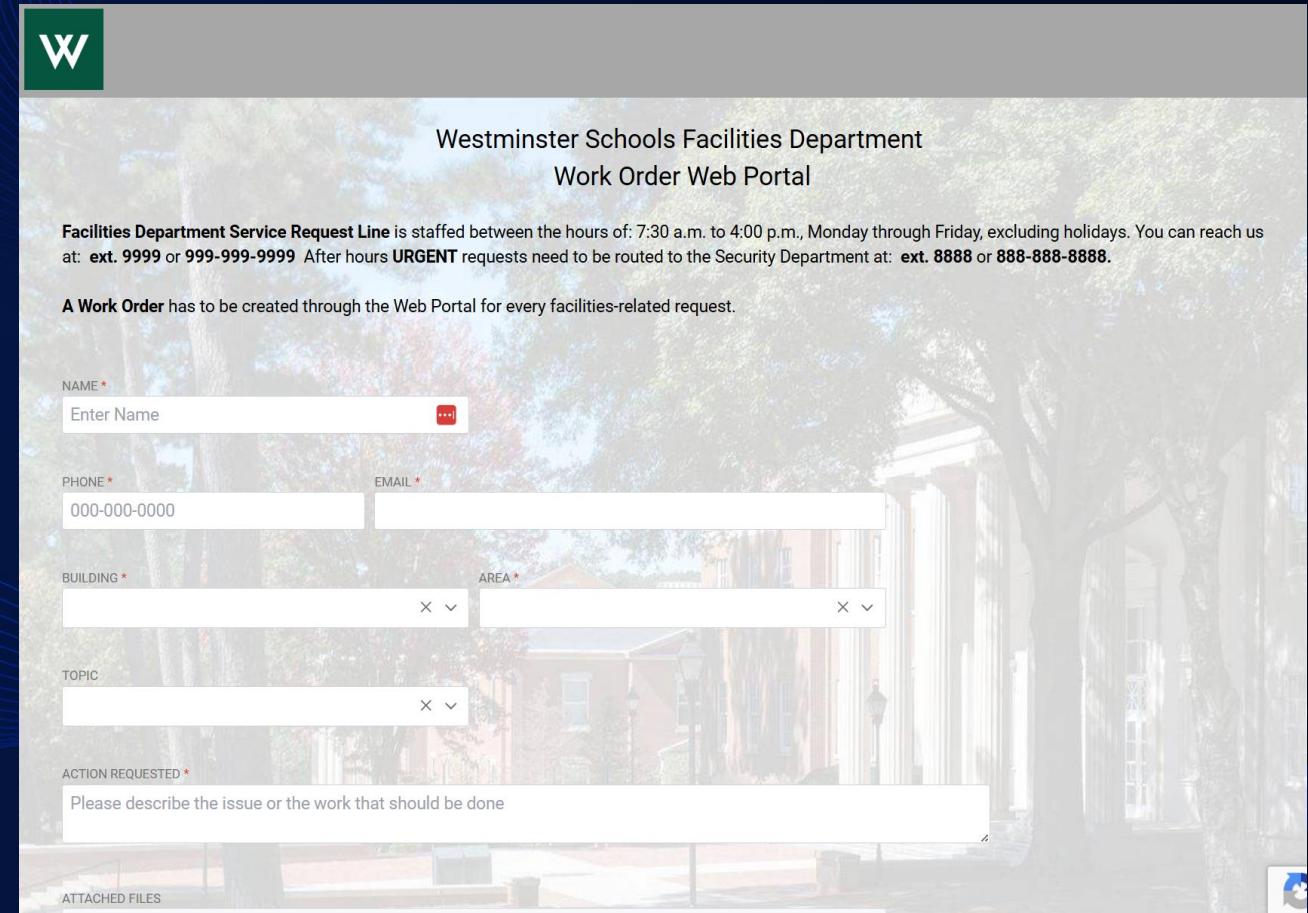


The screenshot shows a web-based service request form titled "Service Request Form - Simple Request". The URL is <https://client.webtma.com/app/?sreq=fsfe5643bdshfbe563r73f3q>. The form has three tabs: "Submission", "Confirmation", and "Status". The "Submission" tab is active, showing a section titled "Submit Service Request" with a text area for "ISSUE DESCRIPTION *". Below it, there are fields for "NAME *", "EMAIL *", and "PHONE NUMBER", each with a text input field. To the right, a sidebar titled "FORM BLOCKS" lists various modules: "Only Available", "Repair Center", "Department", "Action Requested", "Task Code", "Facility", "Building", "Area", "Floor", "Requestor Name", "Phone Number", "Email Address", "Rich Text", and "Section Title".



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



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*
[Redacted]

BUILDING*
[Redacted]

AREA*
[Redacted]

TOPIC
[Redacted]

ACTION REQUESTED*
Please describe the issue or the work that should be done

ATTACHED FILES



SRP Components

- Themes
- Forms
- Portals
- Searches
- Logins

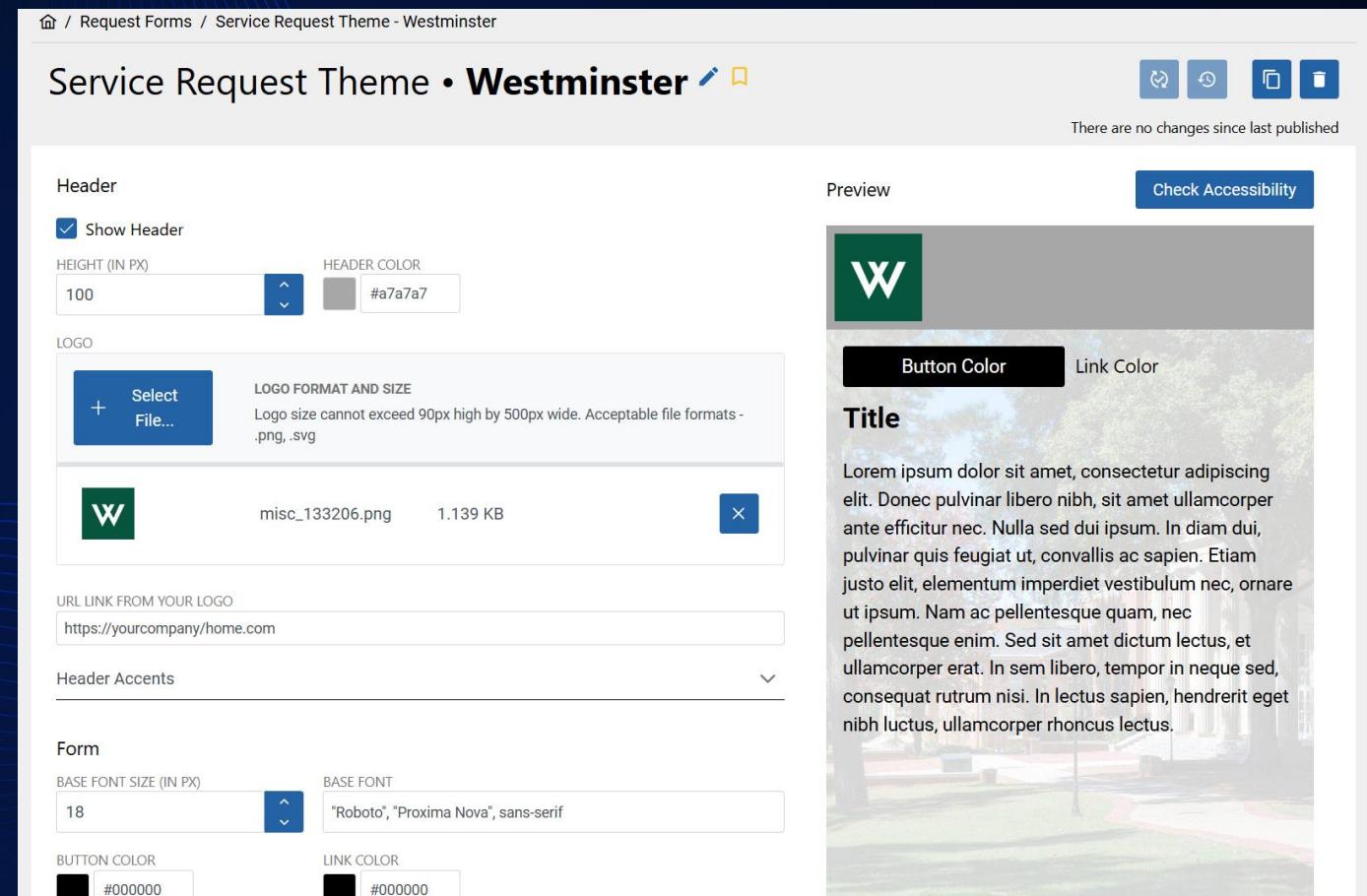
The screenshot displays the SRP Request Forms interface. At the top, a navigation bar shows the path: Home / Request Forms. The main title is "Request Forms" with a yellow star icon. Below the title, there are four main sections: "REQUEST FORMS", "Themes", "Portals", and "Searches", each with a "+" button to add more components.

- REQUEST FORMS**
 - Forms
 - Portals
 - Themes
 - Searches
 - Logins
- Themes**
 - Default LAST PUBLISHED DEC 10, 2024
 - Transportation LAST PUBLISHED MAR 18, 2025
 - Westminster LAST PUBLISHED MAR 18, 2025
- Portals**
 - Home LAST PUBLISHED FEB 26, 2025
- Searches**
 - Request Search LAST PUBLISHED DEC 10, 2024
- Logins**



SRP Themes – Standardization

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



The screenshot shows the 'Service Request Theme • Westminster' configuration page. At the top, there are navigation links for 'Request Forms' and 'Service Request Theme - Westminster', and a message stating 'There are no changes since last published'. On the right, there are icons for refresh, save, and delete, and a 'Check Accessibility' button. The main area is divided into sections: 'Header' (with a checked 'Show Header' checkbox, a height input of 100, and a header color hex code #a7a7a7), 'Logo' (with a 'Select File...' button, a logo format and size input, and a preview of a logo file named 'misc_133206.png' (1.139 KB)), 'URL LINK FROM YOUR LOGO' (with a text input containing 'https://yourcompany/home.com'), 'Header Accents' (with a dropdown menu), 'Form' (with a base font size input of 18, a base font dropdown containing 'Roboto', 'Proxima Nova', 'sans-serif', and a form color hex code #000000), and 'Button Color' (with a button color hex code #000000). To the right, a 'Preview' section shows a header with the logo, a button with 'Button Color' (black), a link with 'Link Color' (black), and a title with the text 'Title' and 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pulvinar libero nibh, sit amet ullamcorper ante efficitur nec. Nulla sed dui ipsum. In diam dui, pulvinar quis feugiat ut, convallis ac sapien. Etiam justo elit, elementum imperdiet vestibulum nec, ornare ut ipsum. Nam ac pellentesque quam, nec pellentesque enim. Sed sit amet dictum lectus, et ullamcorper erat. In sem libero, tempor in neque sed, consequat rutrum nisi. In lectus sapien, hendrerit eget nibh luctus, ullamcorper rhoncus lectus.'.



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>

Submission Confirmation Status Submission - Error Status - Not Found

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 * ...

REPAIR CENTER

REQUEST TYPE

PHONE * EMAIL *

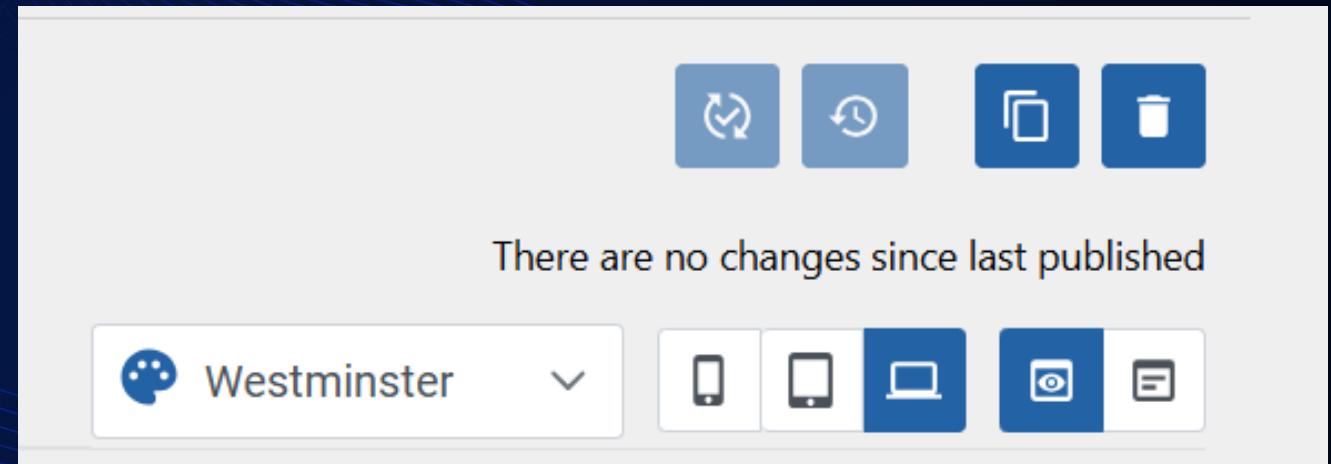
Keyword TEXT AND IMAGES TITLE PARAGRAPH RICH TEXT EXTERNAL IMAGE BUTTONS SUBMIT BUTTON RELOAD BUTTON LINKS AND ATTACHMENTS FILE UPLOAD FORM/PORTAL LINK REQUESTOR REQUESTOR NAME REQUESTOR EMAIL REQUESTOR PHONE ORGANIZATION



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      



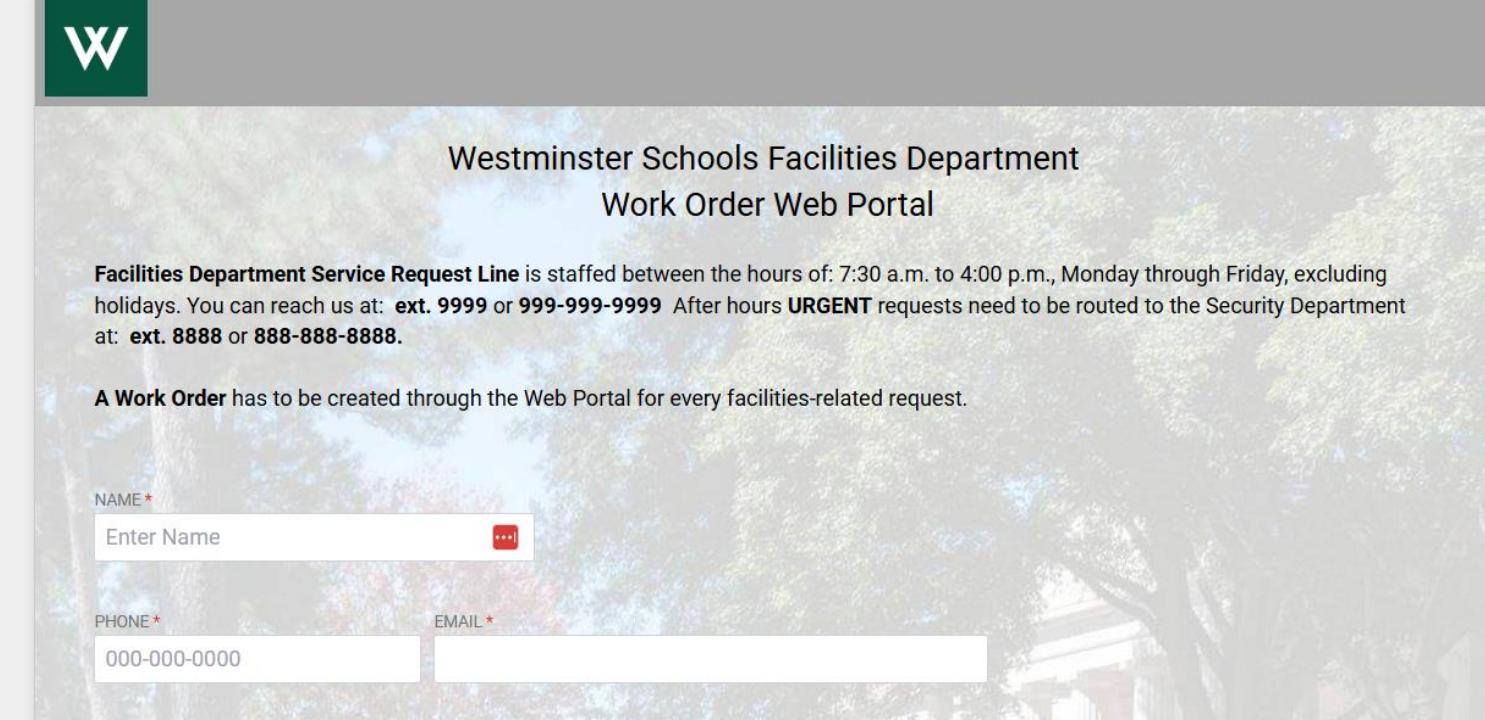
Westminster Schools Facilities Department
Work Order Web Portal

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*



SRP Forms – Tablet 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 * 

PHONE * 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

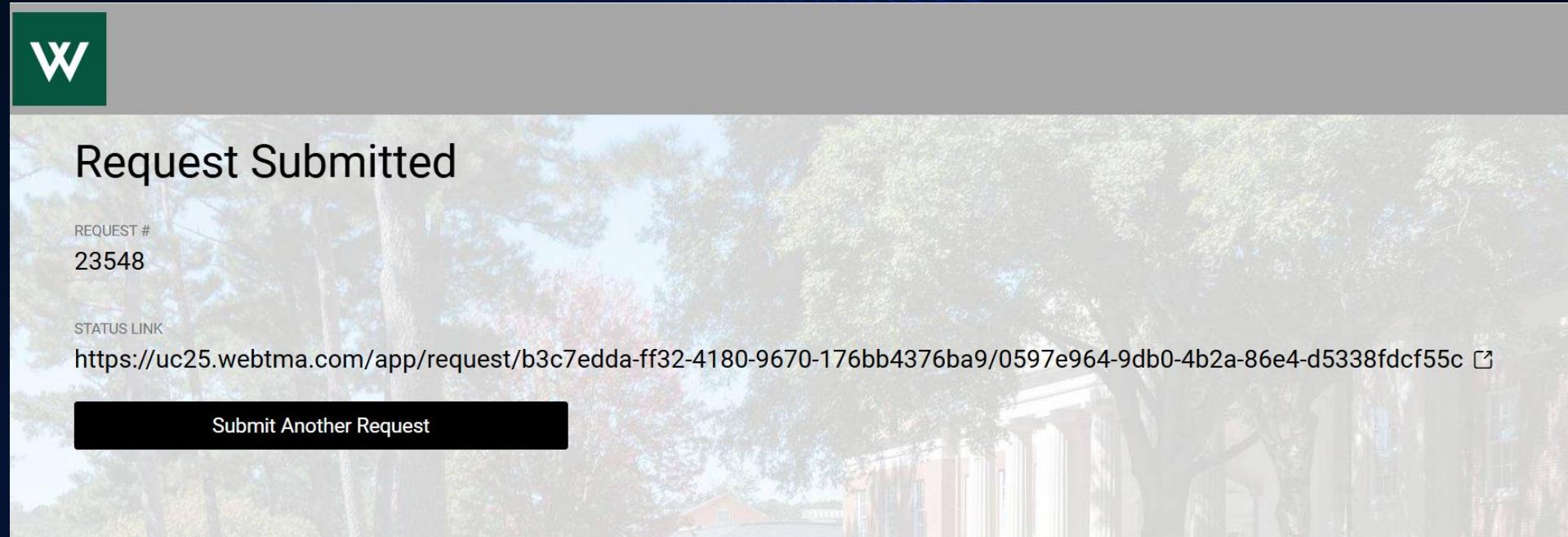
Facilities Department Service Request Line is staffed between the hours of: 7:30 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. You can reach us at: **ext. 9999** or **999-999-9999**. After hours **URGENT** requests need to be routed to the Security Department at: **ext. 8888** or **888-888-8888**.

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

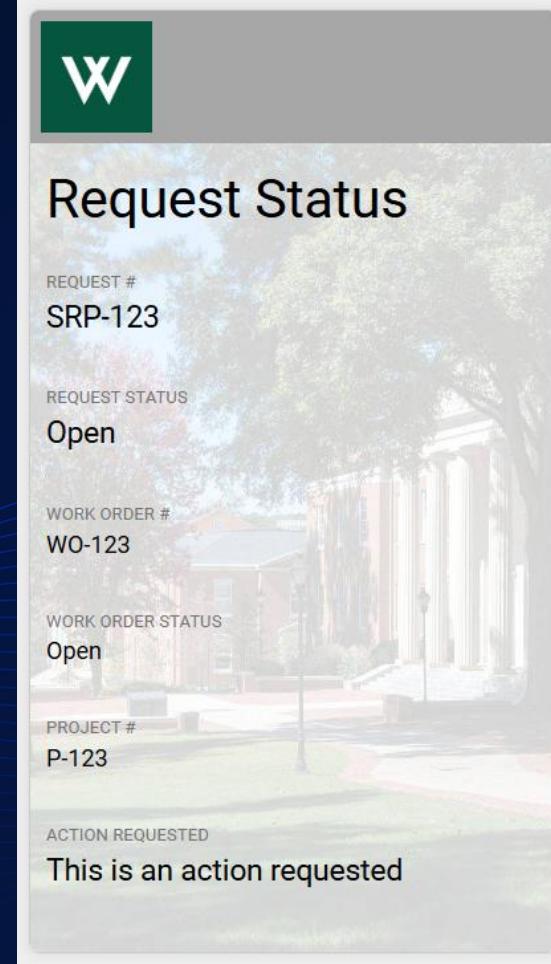
NAME *  



SRP Forms – Confirmation Design



SRP Forms – Status Design

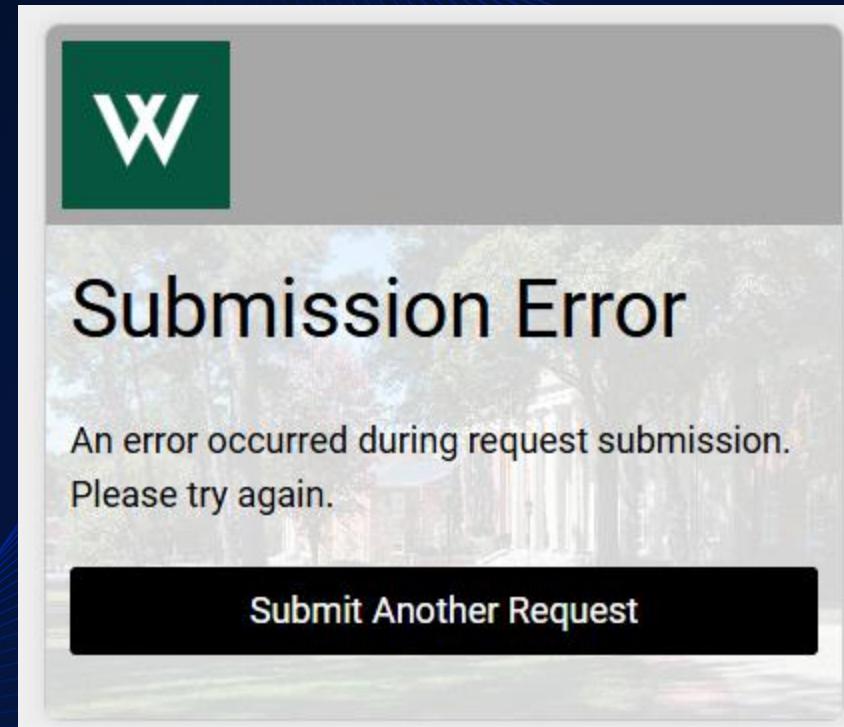


The image shows a mobile application interface for a 'Request Status' form. The background of the app is a photograph of a large, classical-style building with columns and trees. The app has a white header bar with a green square icon containing a white 'W'. The main content area has a light gray background. The form fields are arranged vertically:

- 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.

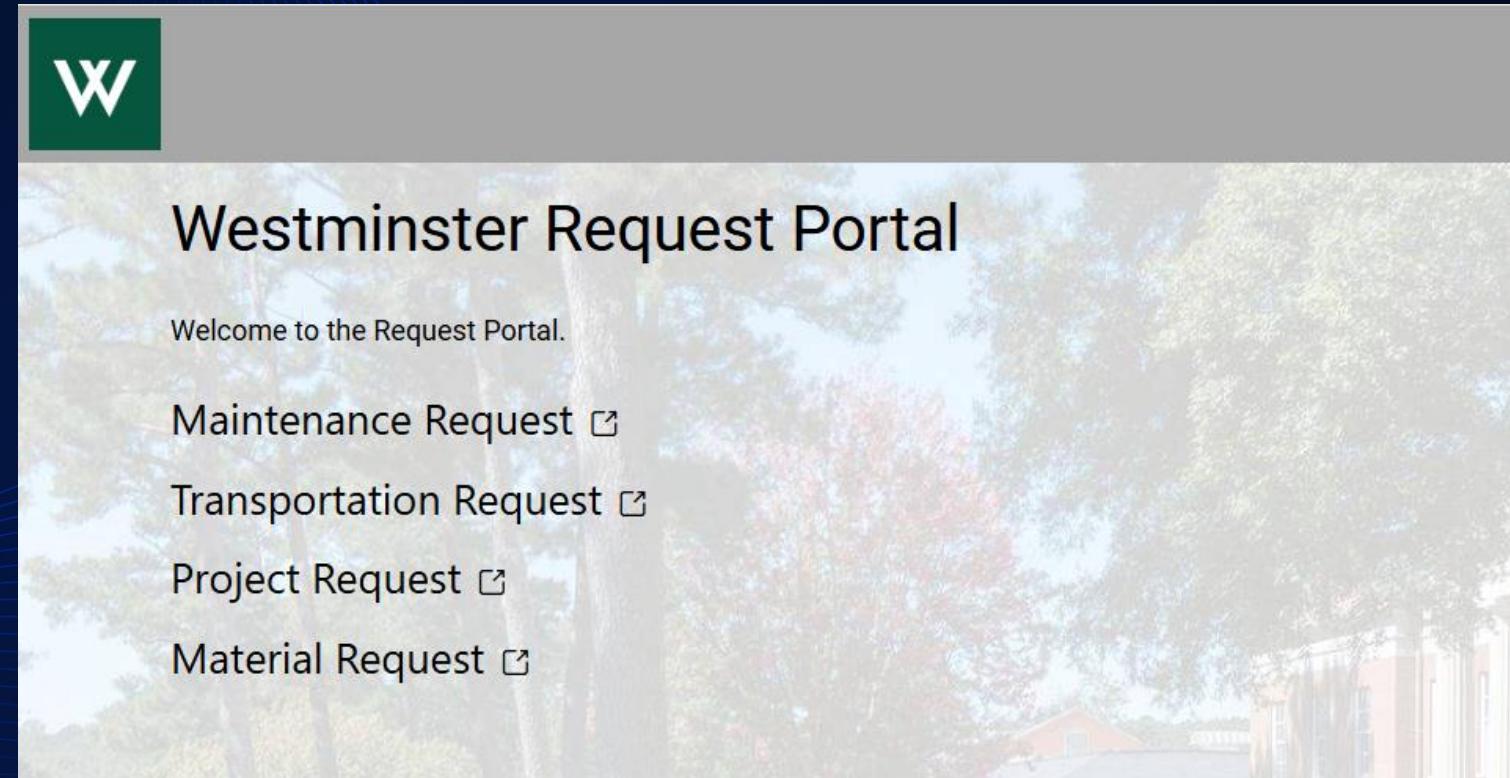


SRP Portal

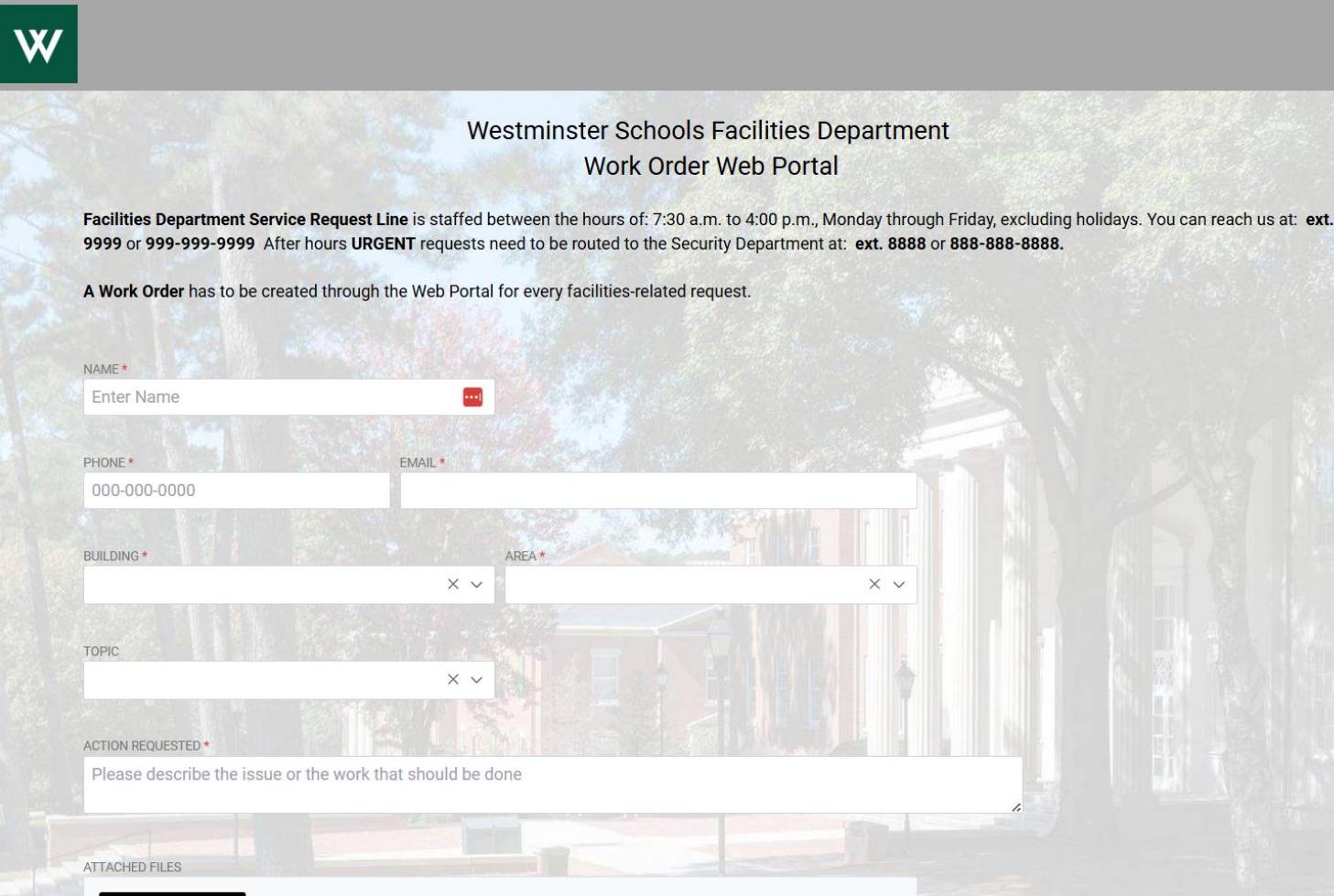
Create a simple landing page for all your request forms.

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 *

Enter Name 

PHONE *

000-000-0000

EMAIL *

BUILDING *

AREA *



TOPIC



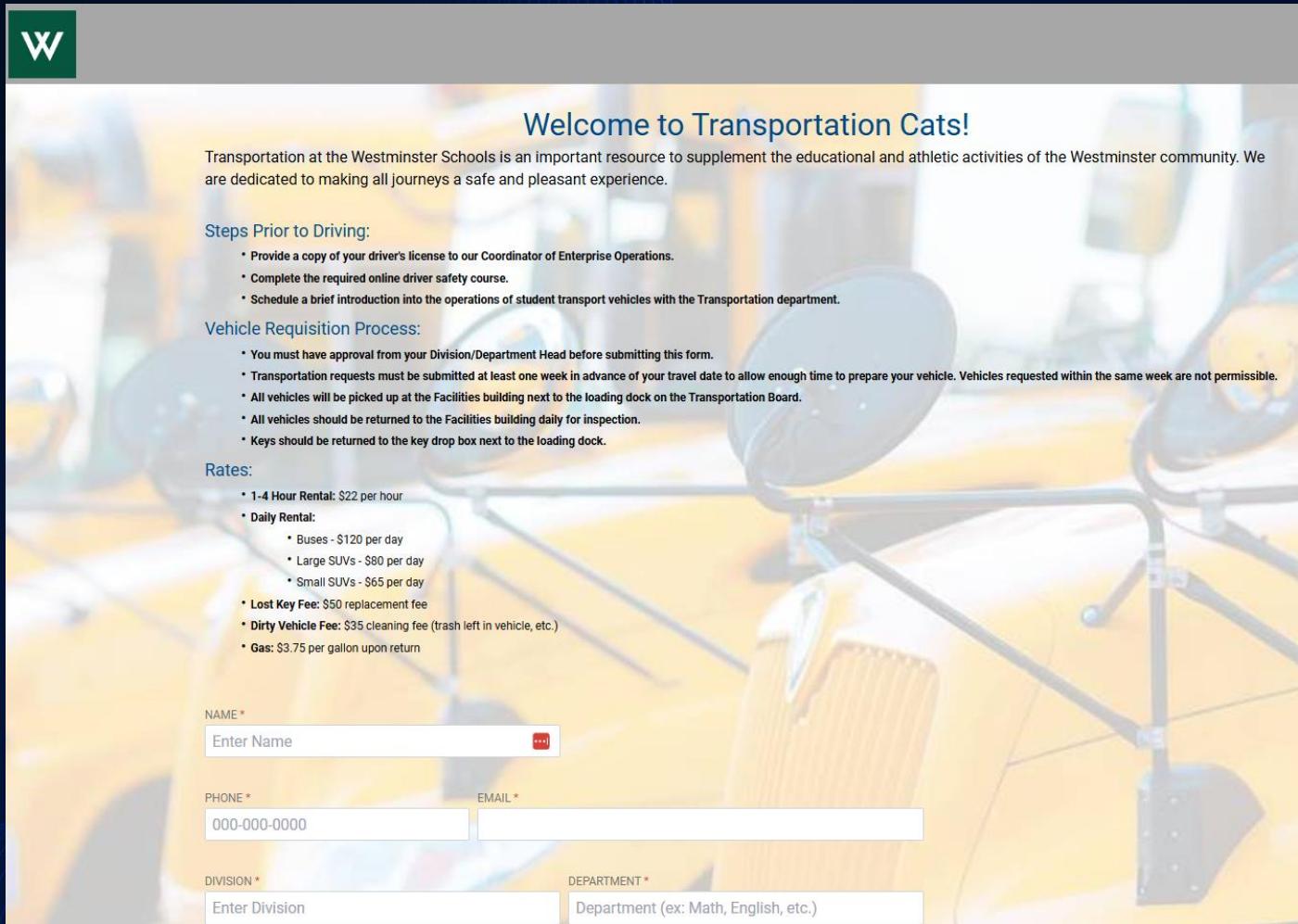
ACTION REQUESTED *

Please describe the issue or the work that should be done

ATTACHED FILES



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

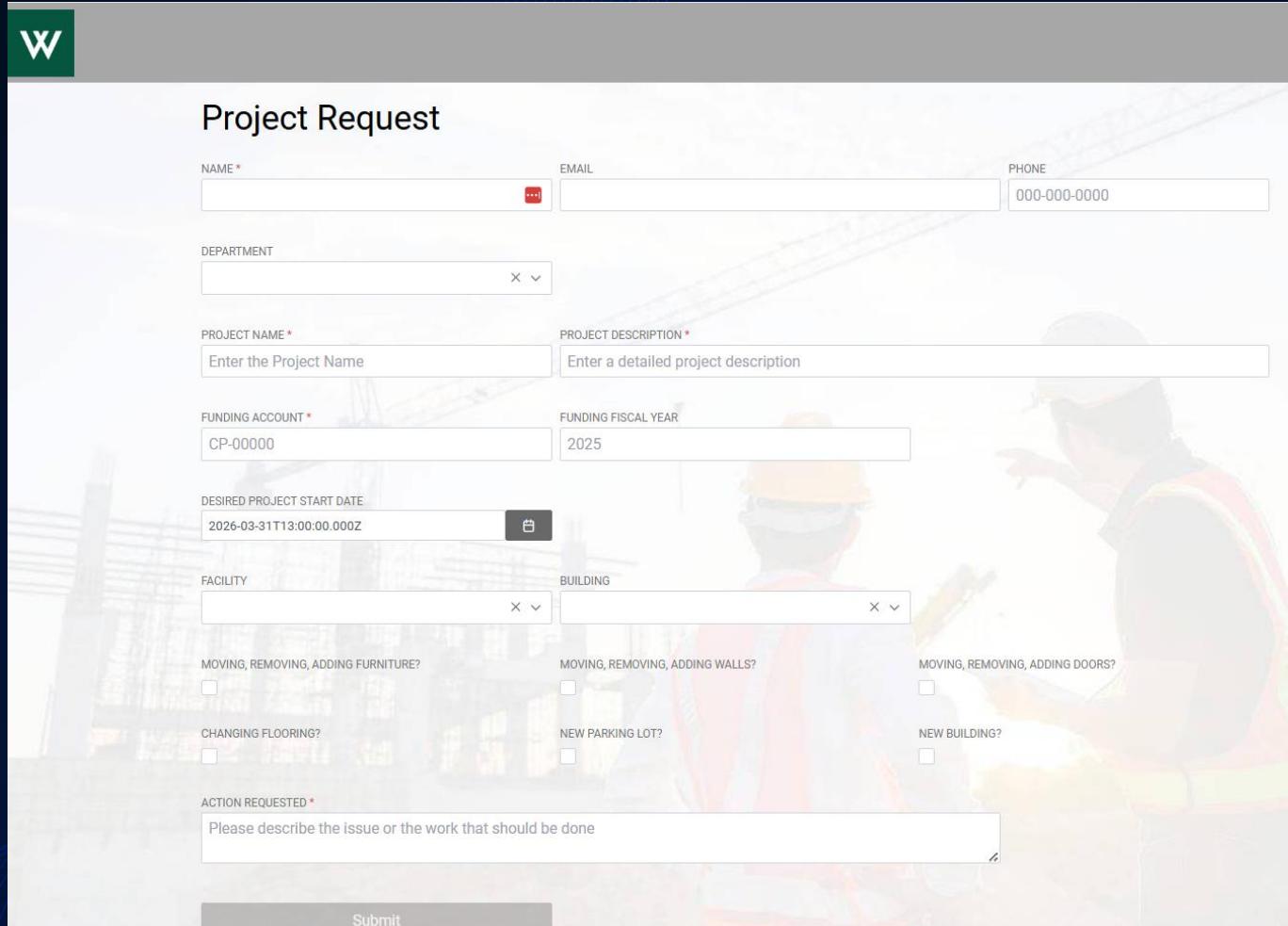
NAME *

PHONE * EMAIL *

DIVISION * DEPARTMENT *



Project Request



W

Project Request

NAME * EMAIL PHONE

DEPARTMENT x v

PROJECT NAME * PROJECT DESCRIPTION *

FUNDING ACCOUNT * FUNDING FISCAL YEAR

DESIRED PROJECT START DATE Clear

FACILITY BUILDING x v

MOVING, REMOVING, ADDING FURNITURE?

MOVING, REMOVING, ADDING WALLS?

MOVING, REMOVING, ADDING DOORS?

CHANGING FLOORING?

NEW PARKING LOT?

NEW BUILDING?

ACTION REQUESTED *

Submit



Material Request

W

Submit Material Request

DEPARTMENT *

Please select a department

NAME *

EMAIL

DELIVERY NOTES

PARTS *

	04275R-001 Ajax Oxygen Bleach Cleanser	COST 10.00	EA 3	<input type="button" value="^"/>	<input type="button" value="v"/>	<input type="button" value="Delete"/>
	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	<input type="button" value="^"/>	<input type="button" value="v"/>	<input type="button" value="Delete"/>

Add Parts

Submit



Hands Up! Polling Question

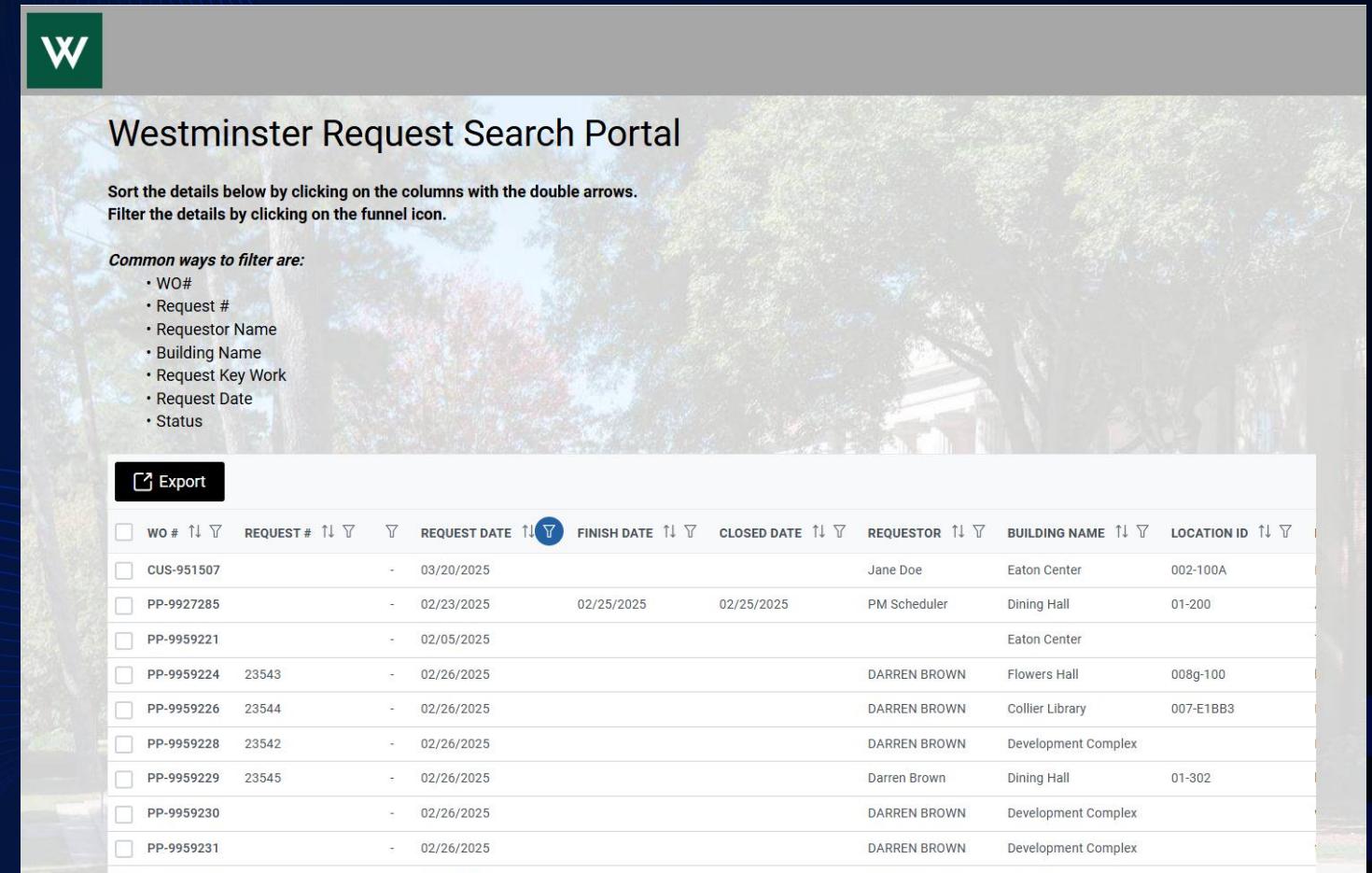
How many in the audience have at least some requestors that login to WebTMA to check the status of their requests?



SRP Search Portal – Anonymous Access

Allows anonymous users to search:

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

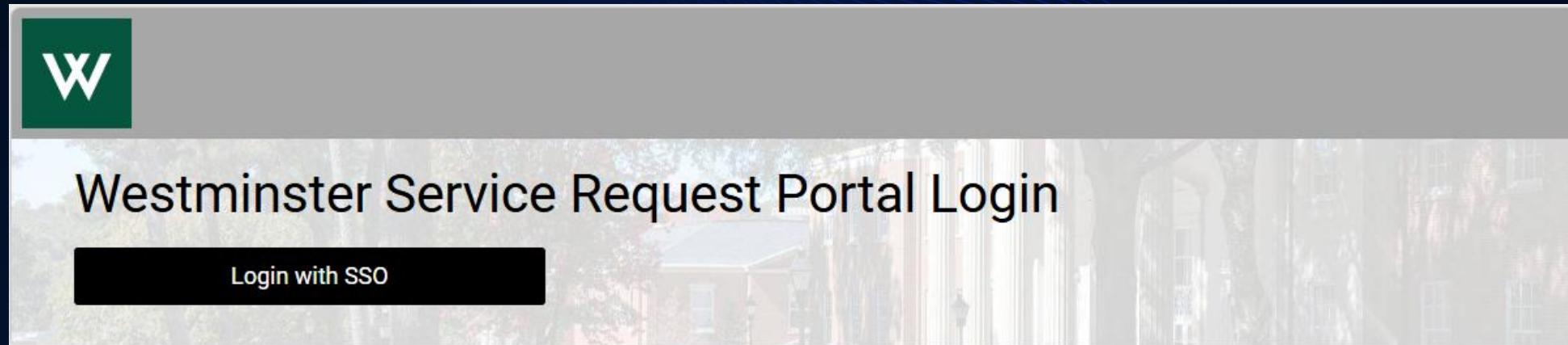


The screenshot shows the Westminster Request Search Portal. At the top, there is a green logo with a white 'W'. Below it, the title 'Westminster Request Search Portal' is displayed. A message instructs users to 'Sort the details below by clicking on the columns with the double arrows.' and 'Filter the details by clicking on the funnel icon.' A list of 'Common ways to filter are:' includes: WO#, Request #, Requestor Name, Building Name, Request Key Work, Request Date, and Status. An 'Export' button is located above a table. The table has columns: WO #, REQUEST #, REQUEST DATE, FINISH DATE, CLOSED DATE, REQUESTOR, BUILDING NAME, and LOCATION ID. The data in the table is as follows:

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



SRP Login Types – SSO Login



SRP Login Types – SSO Config

User Access Form X

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

SSO will be required for anonymous users

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

Select

Active UC25SR ****

Login ID UC25SR ****

Password

Sales Person Sales Person

URL Login URL Login

Locked Out

Force Password Change

Preferred Language

WebTMA GO WebTMA GO

mobileTMA mobileTMA

CellularTMA

Mobile Access Only

Mobile General Inspections

Anonymous Access Only i

Cancel **Update Access**





Thank You / Q&A

tammy.neal@tmasystems.com | tim.prado@tmasystems.com

tmasystems.com

