

# Requestor Options with WebTMA



HARD ROCK  
CASINO & HOTELS

TULSA | MAR 30 – APR 02



# Introductions



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Seasoned Senior Consultant with 17 years of experience at TMA Systems focusing on WebTMA implementation and optimizing workflows.

Notable Clients implemented:

- University of Missouri
- Baylor University
- San Diego State University
- Westminster Schools
- City and County of San Francisco



# Agenda

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# Service Request Portal

- 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

Service Request Form - **Simple Request**  
https://client.webtma.com/app/?sreq=fsfe5643bdshfbe563r73f3q

Submission Confirmation Status

## Submit Service Request

Here is some nice preamble text that could be displayed between form blocks if needed, and could included titles, warnings, etc.

**ISSUE DESCRIPTION \***

Please describe the issue requiring action or service

**NAME \***

Enter text...

**EMAIL \***

Enter text...

**PHONE NUMBER**

Enter text...

**FORM BLOCKS**

Only Available

**ORGANIZATION**

- Repair Center
- Department

**REQUEST**

- Action Requested
- Task Code

**LOCATION**

- Facility
- Building
- Area
- Floor

**REQUESTOR INFO**

- Requestor Name
- Phone Number
- Email Address

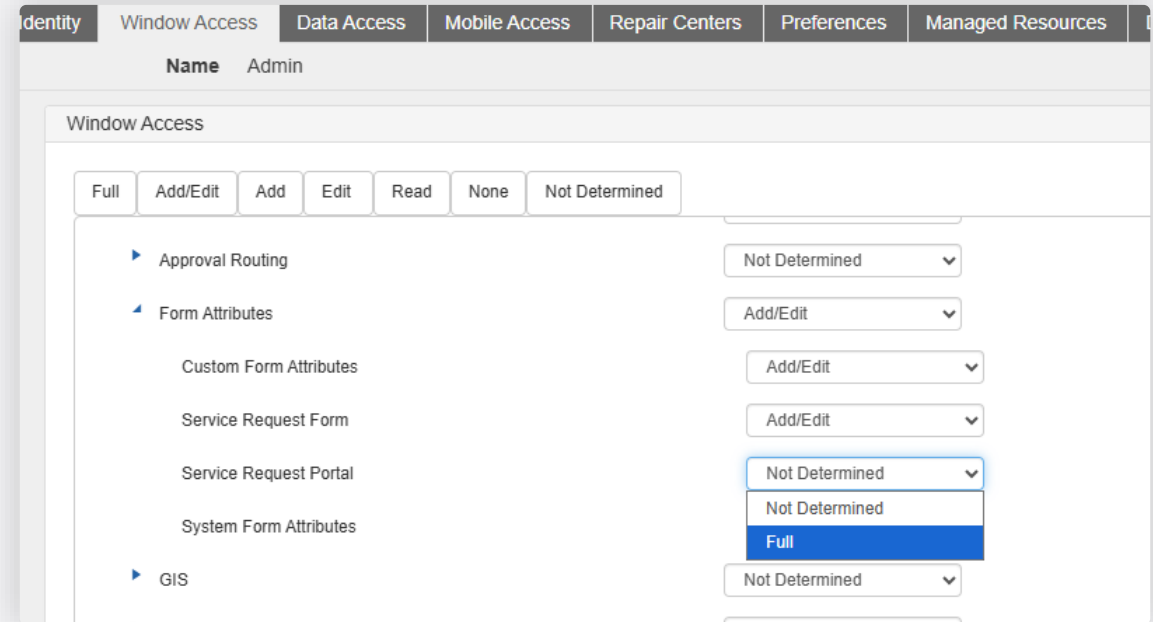
**TEXT**

- Rich Text
- Section Title



# Enabling the SRP Menu

- Only Admins or the Service Request Portal designer need access to this menu
- **Go to:** Admin-User Management-Groups > Find your group and select Window Access tab
- **Expand the Admin menu > Form Attributes > Service Request Portal > Full**





# Features and Capabilities

- Auto Saves work - has a revert button
- Two form types – Work Request and Material Request
- Suggested formatting in fields (phone, accounts, etc.)
- Layout view for mobiles and tablets to check for compatibility
- Accessibility compliance checker
- Requestors can check status of request without a login
- Email with link to status page for requestors
- Simplified document/photo uploads

The screenshot shows a web portal interface for submitting a work order. At the top left is a green 'W' logo. The title is 'Westminster Schools Facilities Department Work Order Web Portal'. Below the title is a paragraph of text: '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.' Below this is another line of text: 'A Work Order has to be created through the Web Portal for every facilities-related request.' The form fields include: 'NAME \*' with a text input 'Enter Name' and a red 'x' icon; 'PHONE \*' with a text input '000-000-0000'; 'EMAIL \*' with a text input; 'BUILDING \*' and 'AREA \*' with dropdown menus; 'TOPIC' with a dropdown menu; and 'ACTION REQUESTED \*' with a text input 'Please describe the issue or the work that should be done'. At the bottom left, there is an 'ATTACHED FILES' section with a plus icon. The background of the form is a faded image of a school building.



# SRP Components

- Themes
- Forms
- Portals
- Searches
- Logins

Request Forms ☆

REQUEST FORMS

- Forms
- Portals
- Themes
- Searches
- Logins

**Forms** +

- Maintenance Request  
LAST PUBLISHED FEB 26, 2025
- Service Request  
LAST PUBLISHED DEC 10, 2024
- Westminster Maintenance Request  
LAST PUBLISHED MAR 18, 2025
- Westminster Transportation Request  
LAST PUBLISHED MAR 18, 2025

**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, customized fonts

The screenshot shows the configuration interface for a Service Request Theme. The title is "Service Request Theme • Westminster". The interface is divided into two main sections: "Header" and "Form".

**Header Section:**

- Show Header
- HEIGHT (IN PX): 100
- HEADER COLOR: #a7a7a7
- LOGO: A "Select File..." button is present. Below it, a table shows a selected logo:
 

Image	File Name	Size
	misc_133206.png	1.139 KB
- LOGO FORMAT AND SIZE: Logo size cannot exceed 90px high by 500px wide. Acceptable file formats - .png, .svg
- URL LINK FROM YOUR LOGO:
- Header Accents:

**Form Section:**

- BASE FONT SIZE (IN PX): 18
- BASE FONT: "Roboto", "Proxima Nova", sans-serif
- BUTTON COLOR: #000000
- LINK COLOR: #000000

**Preview Section:**

- Check Accessibility button
- Preview image showing a header with a green "W" logo, a black button, and a link.
- Text below the preview: "Title" followed by Lorem ipsum text.



# SRP Forms

- Auto saves changes – has a revert button
- Publish function allows deployment control
- Drag and drop fields
- Can have more than 2 columns of data on the form
- Preview page for different layouts
- Confirmation, status, submission error pages

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 \*  
Enter Name \*\*\*

REPAIR CENTER

REQUEST TYPE

PHONE \*  
000-000-0000

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

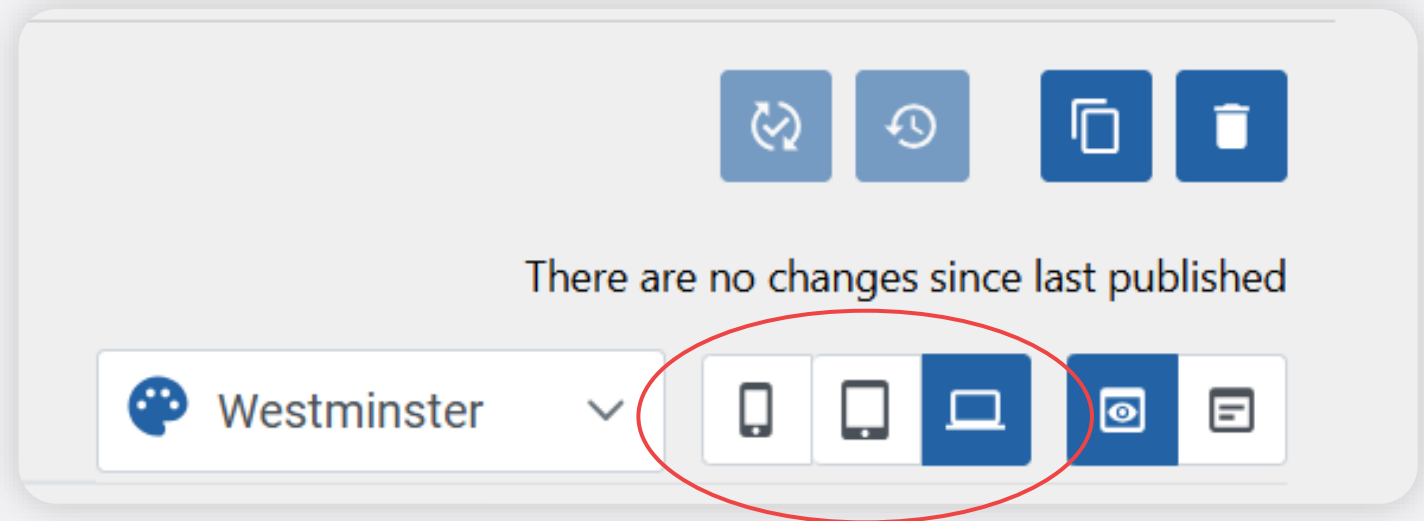
REQUESTOR PHONE

ORGANIZATION

# SRP Forms – Preview Layouts

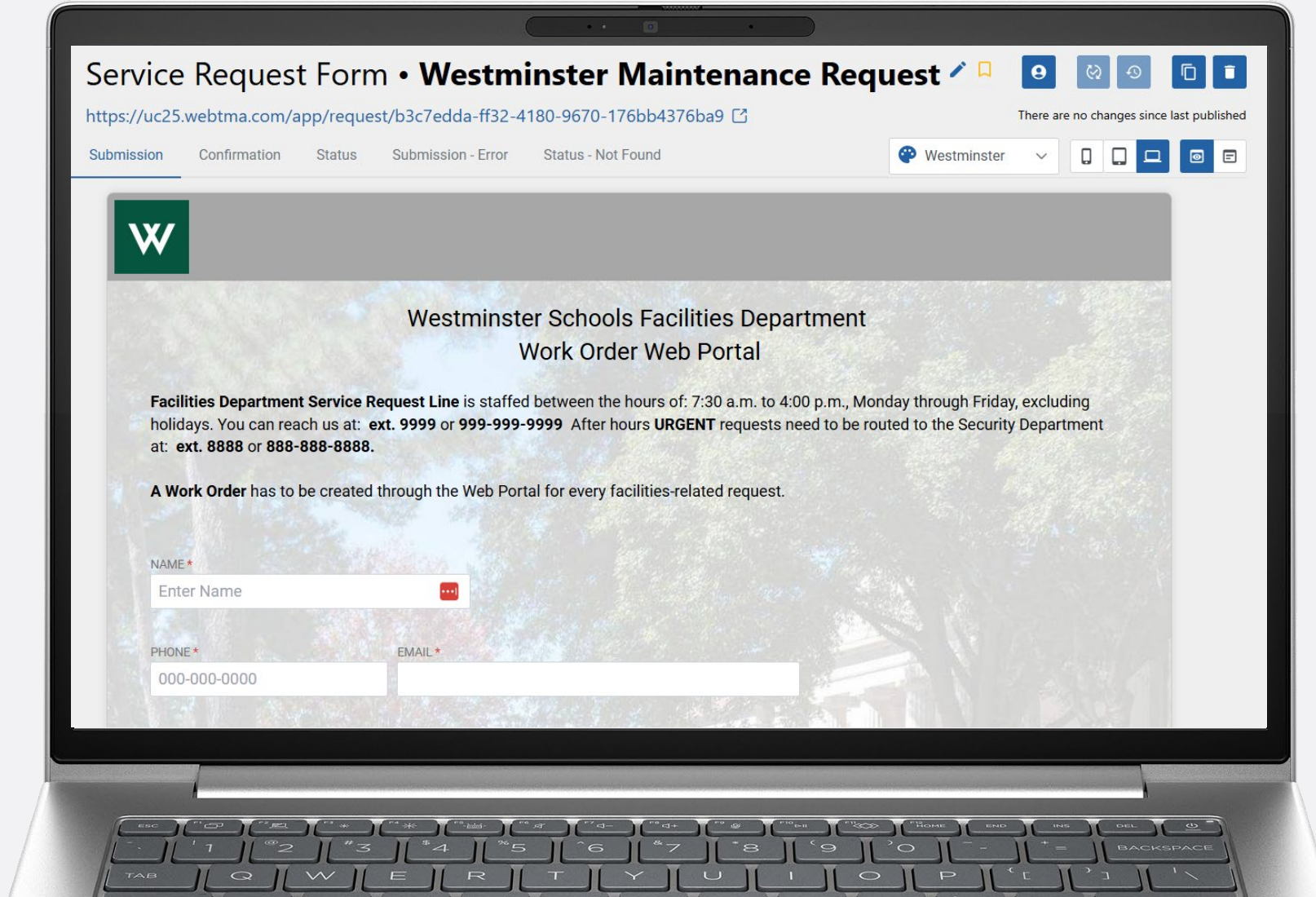
Preview Layouts for 3 formats:

- Laptop/Computer
- Tablet
- Mobile



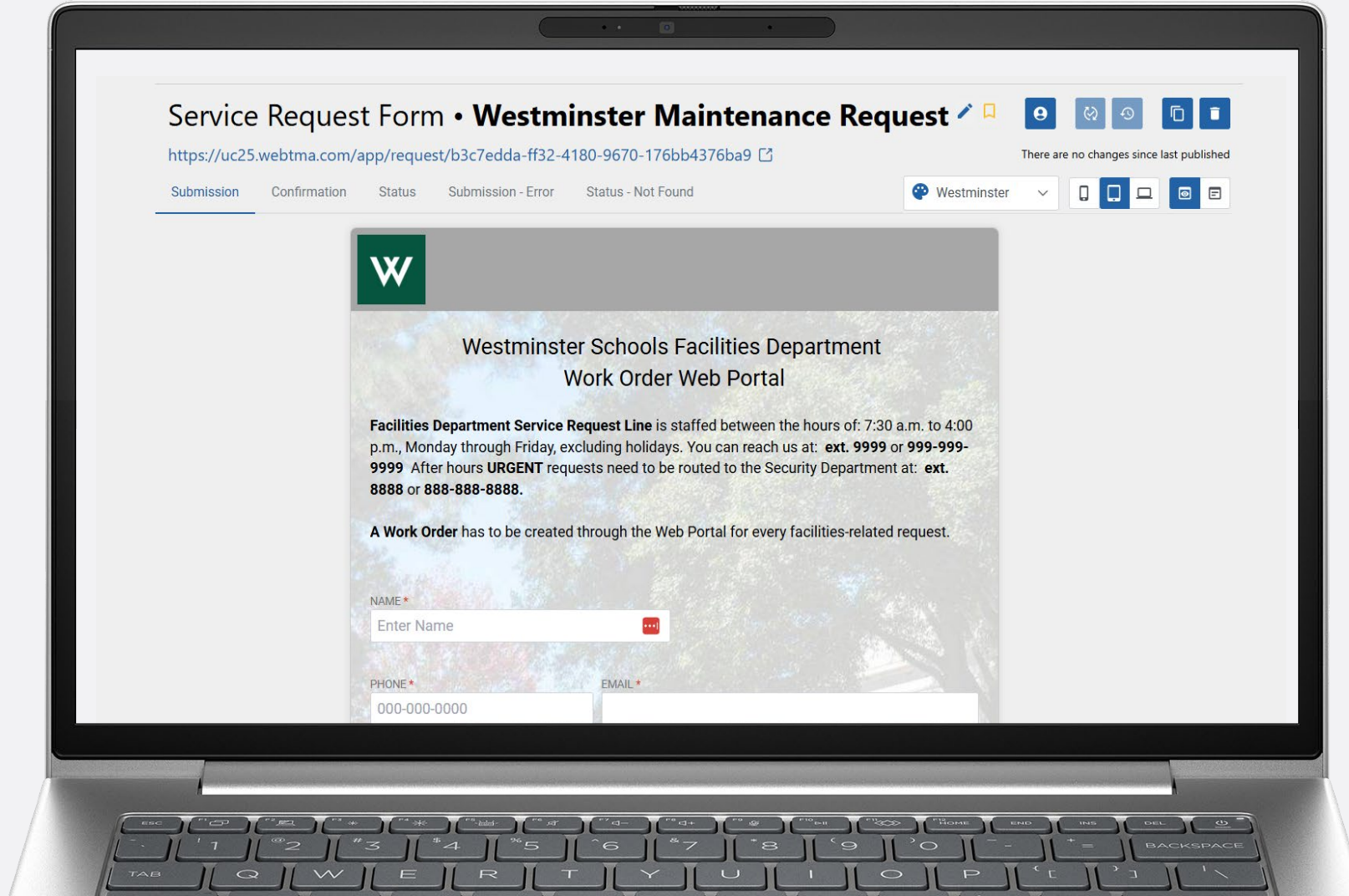


# SRP Forms – Laptop Layout



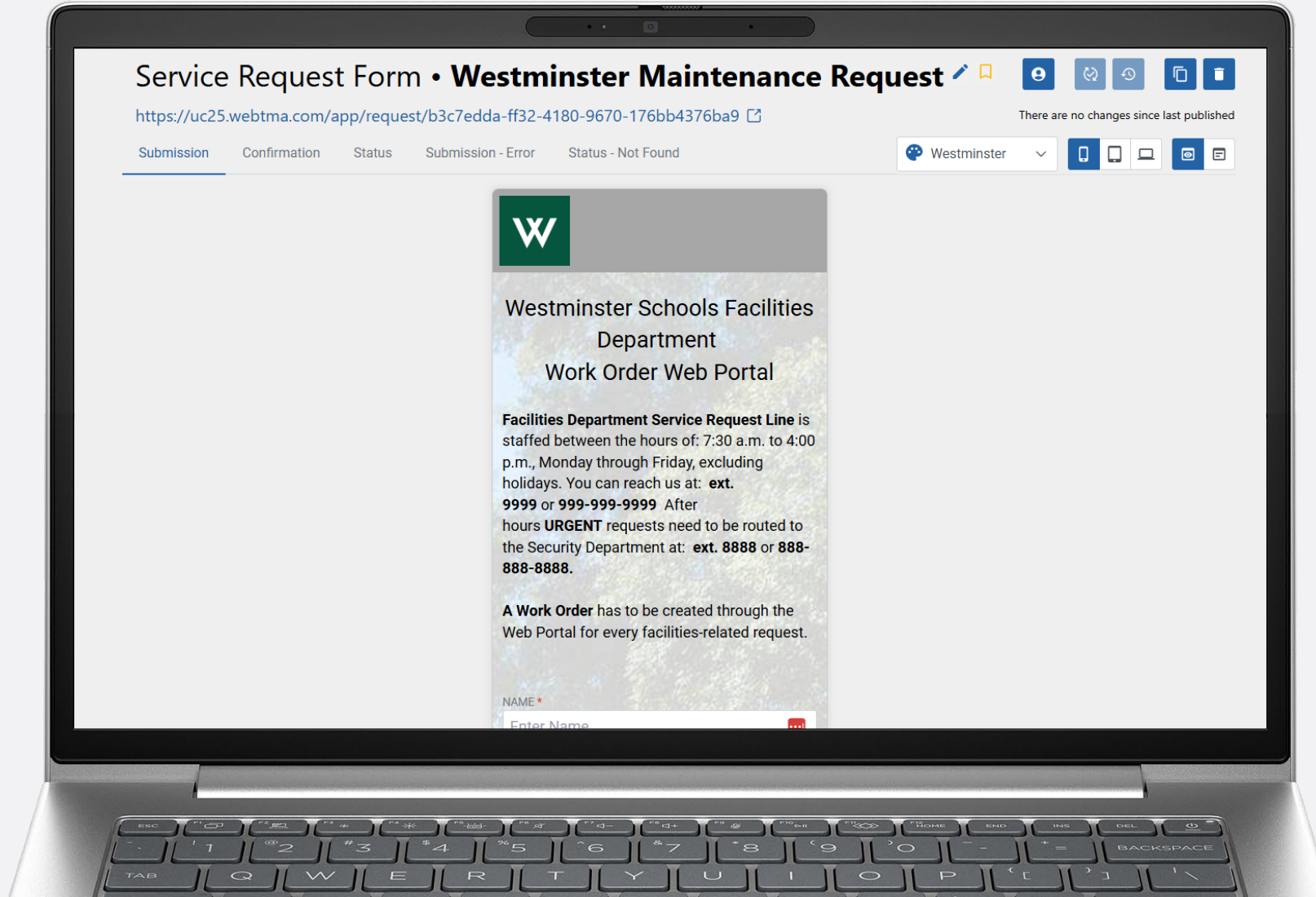


# SRP Forms – Tablet Layout



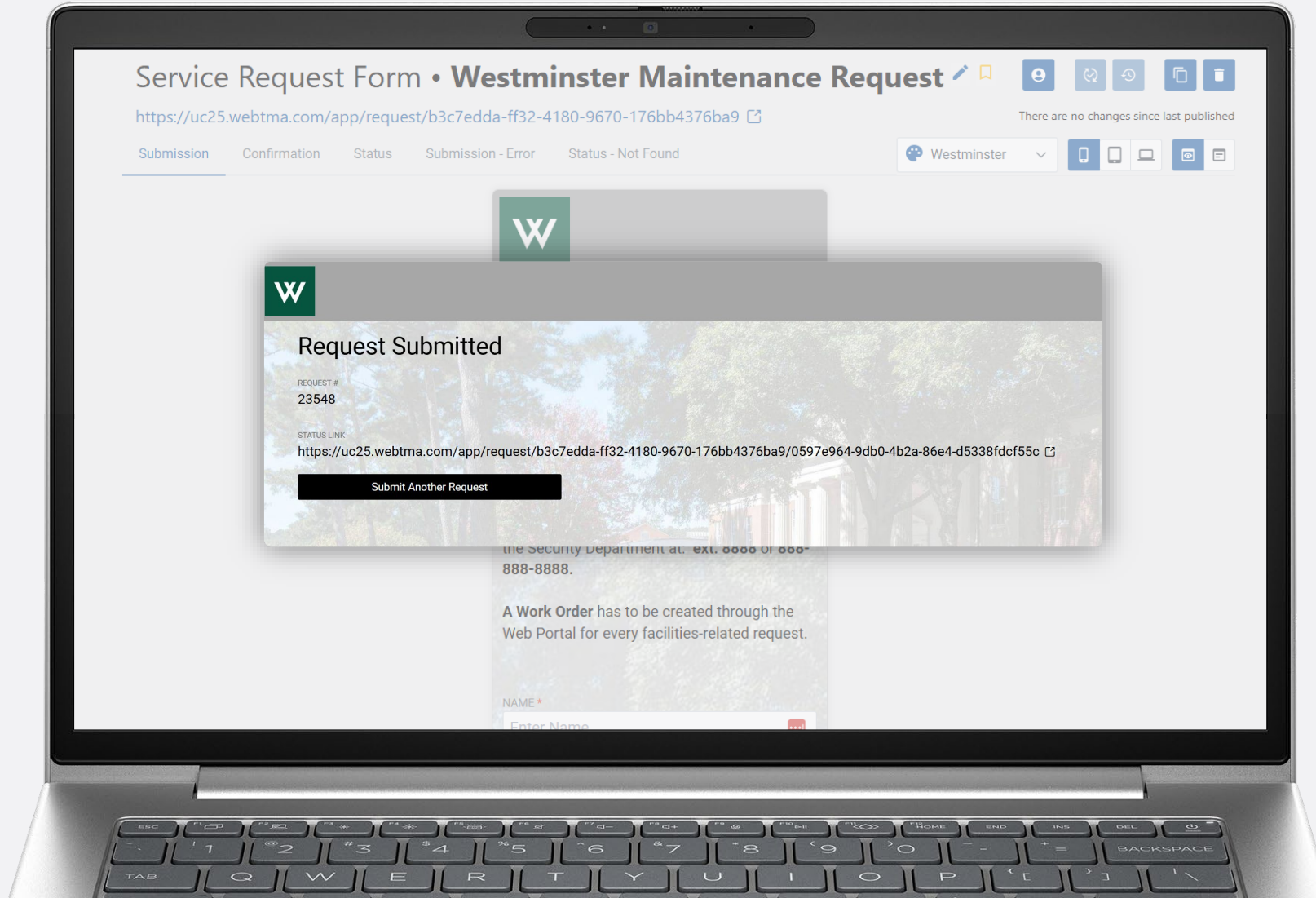


# SRP Forms – Mobile Layout





# SRP Forms – Confirmation Design





# SRP Forms – Custom Status Design

- As part of the form design, you can create a custom Status page and include several different fields.
- Requestors can check the status after they submit a request, or you can provide a link to their request status in an email link.

A mockup of a 'Request Status' form. The form has a dark green header with a white 'W' logo. The background is a faded image of a building with columns. The form contains the following text:

**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 Search Portal – Anonymous Access

Allows users to search by:

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

**W**

## Westminster Request Search Portal

Sort the details below by clicking on the columns with the double arrows.  
Filter the details by clicking on the funnel icon.

**Common ways to filter are:**

- WO#
- Request #
- Requestor Name
- Building Name
- Request Key Work
- Request Date
- Status

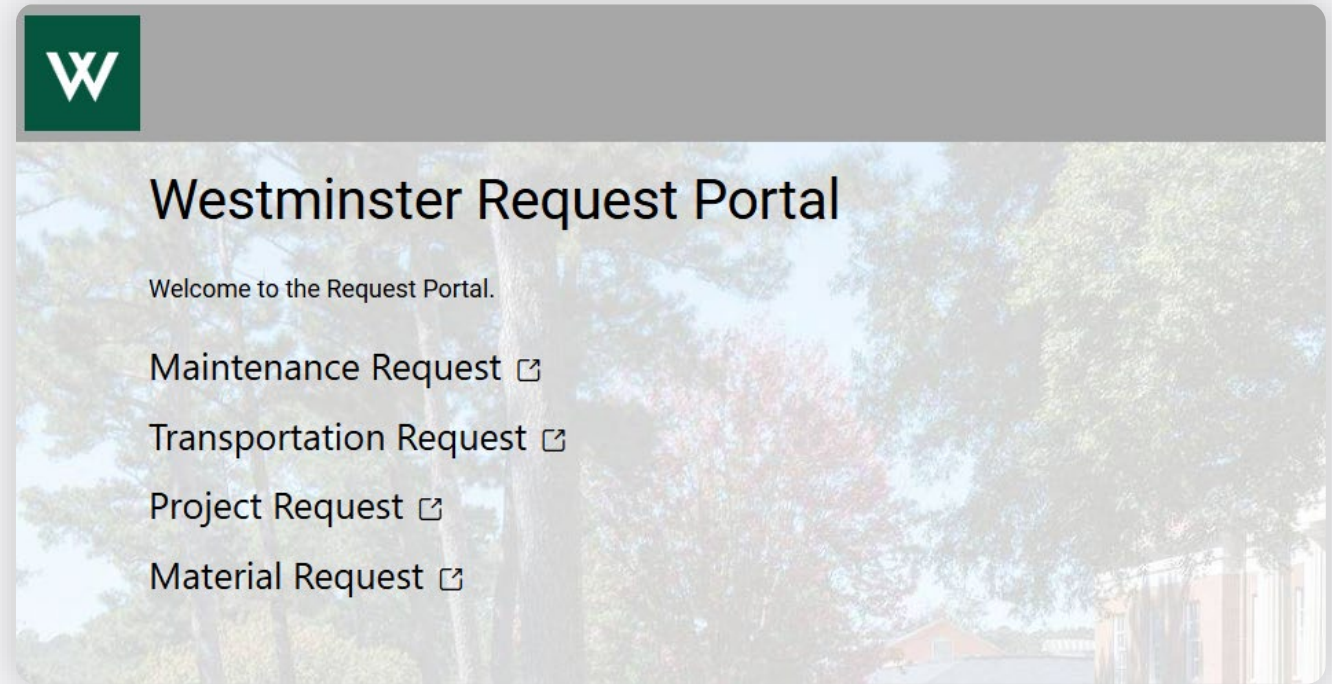
[Export](#)

<input type="checkbox"/>	WO # ↑↓	REQUEST # ↑↓	REQUEST DATE ↑↓	FINISH DATE ↑↓	CLOSED DATE ↑↓	REQUESTOR ↑↓	BUILDING NAME ↑↓	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 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.



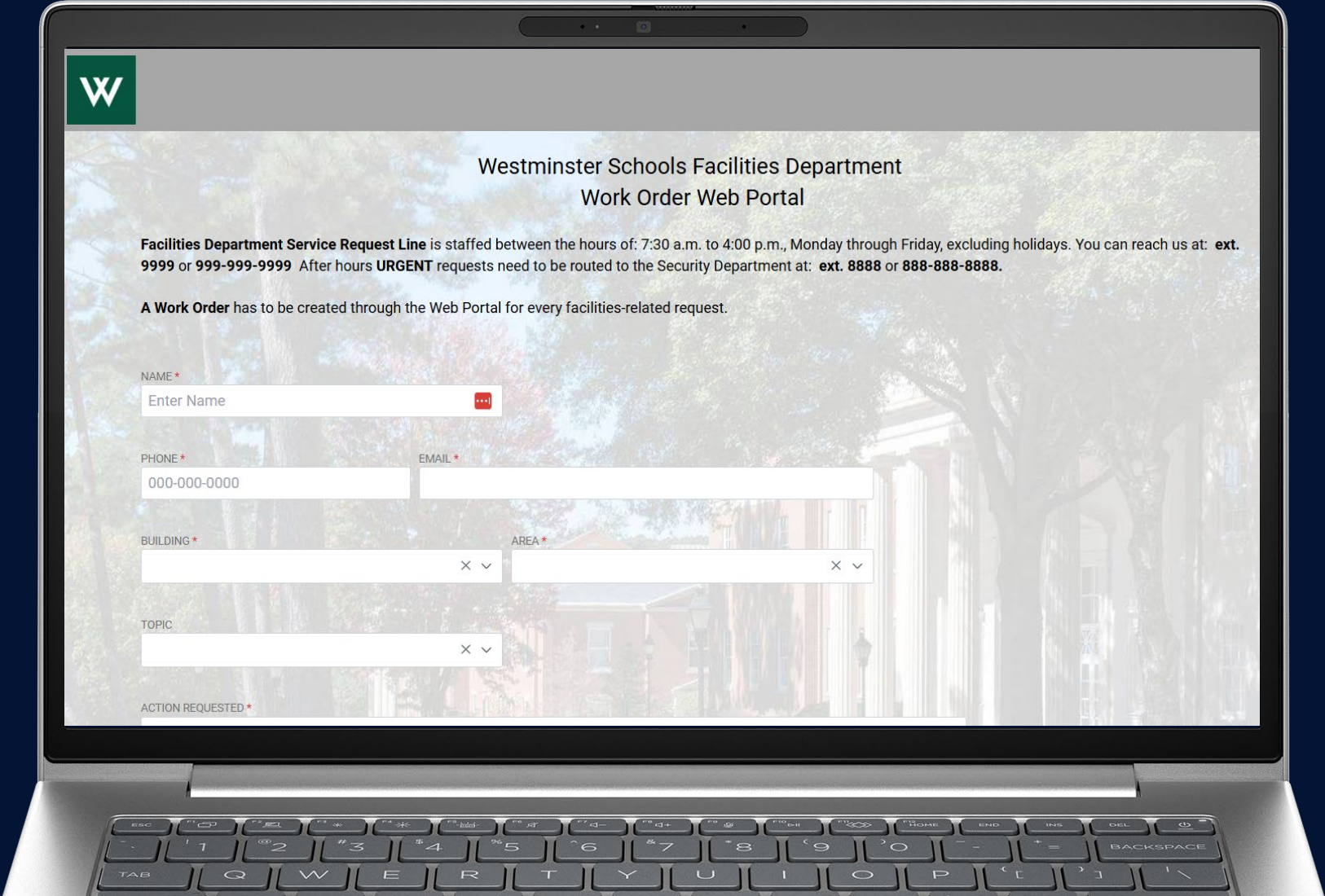


Demo of the WebTMA Request Portal

# The Requestor Experience

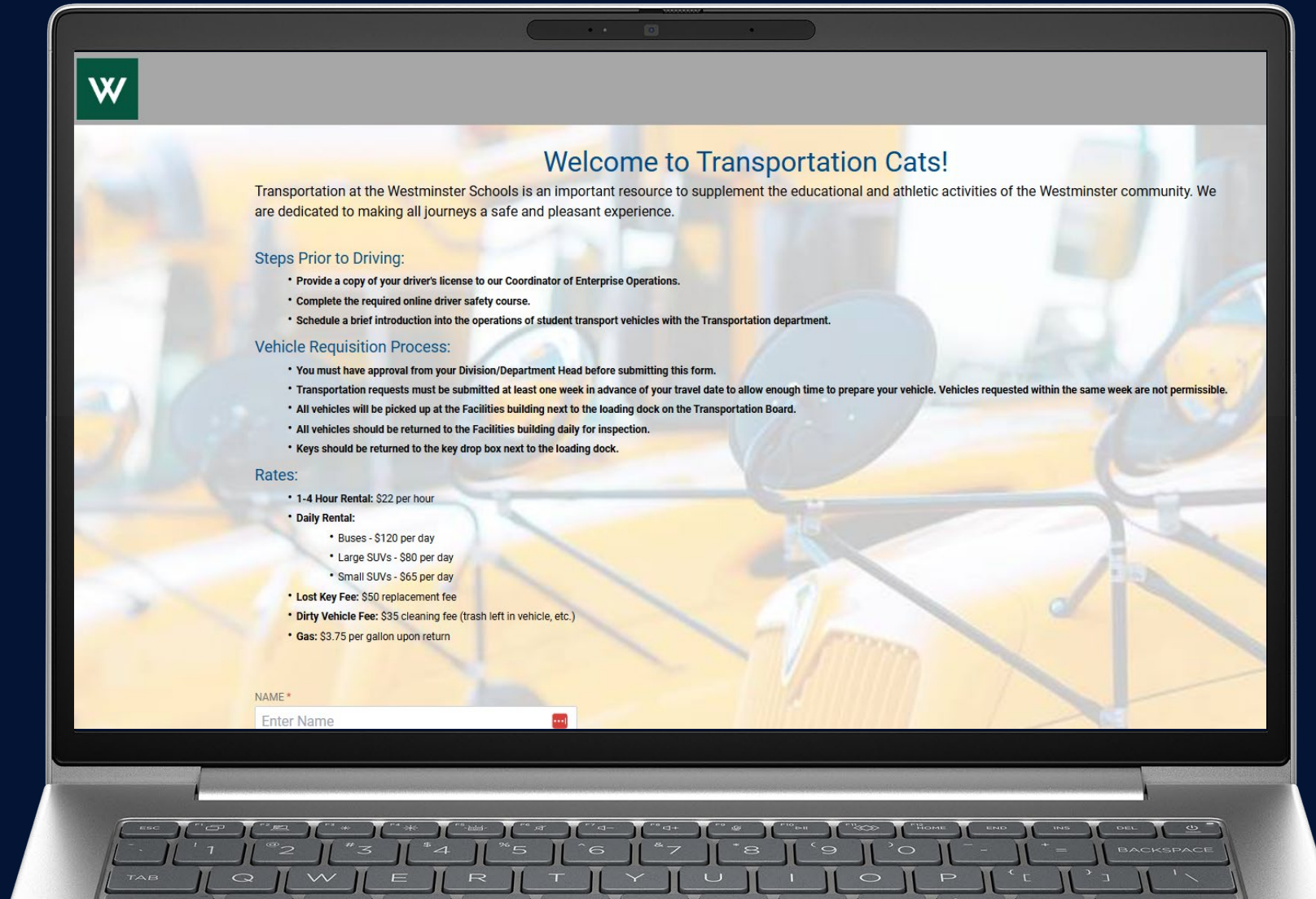


# Example of the Maintenance Request





# Example of the Transportation Request





# Example of the Project Request

**W**

## Project Request

NAME \*  EMAIL  PHONE

DEPARTMENT

PROJECT NAME \*  PROJECT DESCRIPTION \*

FUNDING ACCOUNT \*  FUNDING FISCAL YEAR

DESIRED PROJECT START DATE

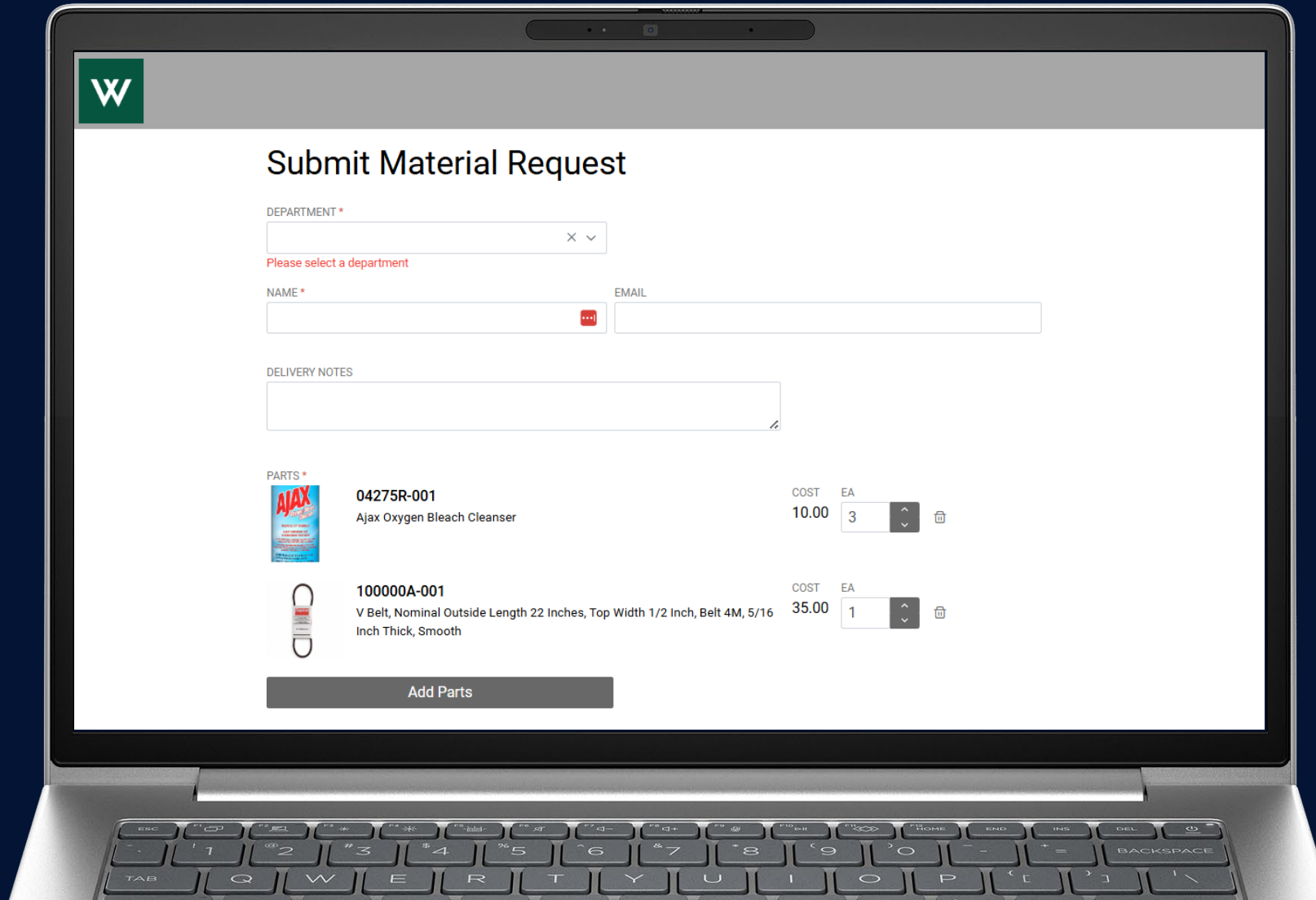
FACILITY  BUILDING

MOVING, REMOVING, ADDING FURNITURE?  MOVING, REMOVING, ADDING WALLS?  MOVING, REMOVING, ADDING DOORS?

CHANGING FLOORING?  NEW PARKING LOT?  NEW BUILDING?



# Example of the Material Request





# SRP Login Types – Anonymous

## Configuring anonymous access

### 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

Cancel **Update Access**

Active

Login ID UC25SR

Password \*\*\*\*\*

Sales Person

URL Login

Locked Out

Force Password Change

Preferred Language

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WebTMA GO

mobileTMA

CellularTMA

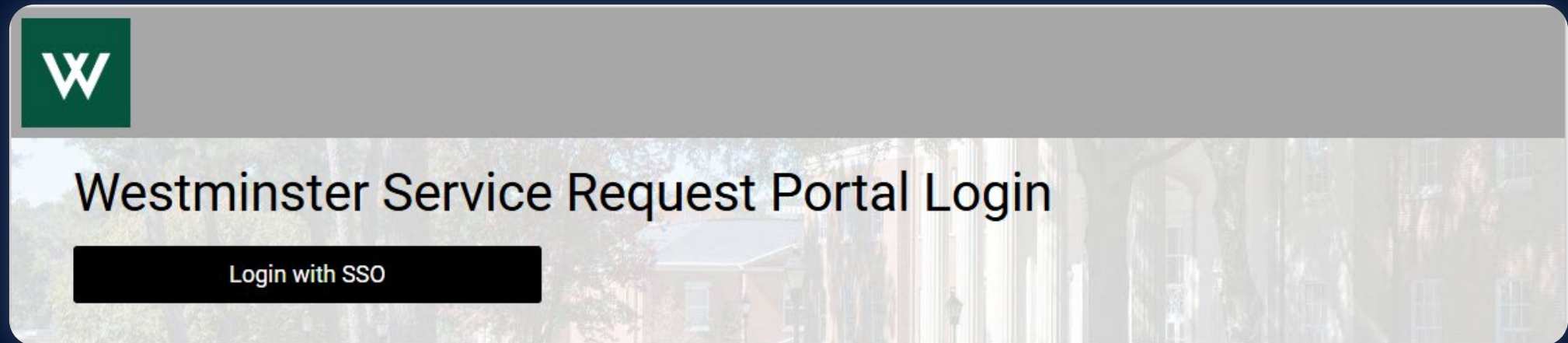
Mobile Access Only

Mobile General Inspections

Anonymous Access Only



# SRP Login Types – SSO





# 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

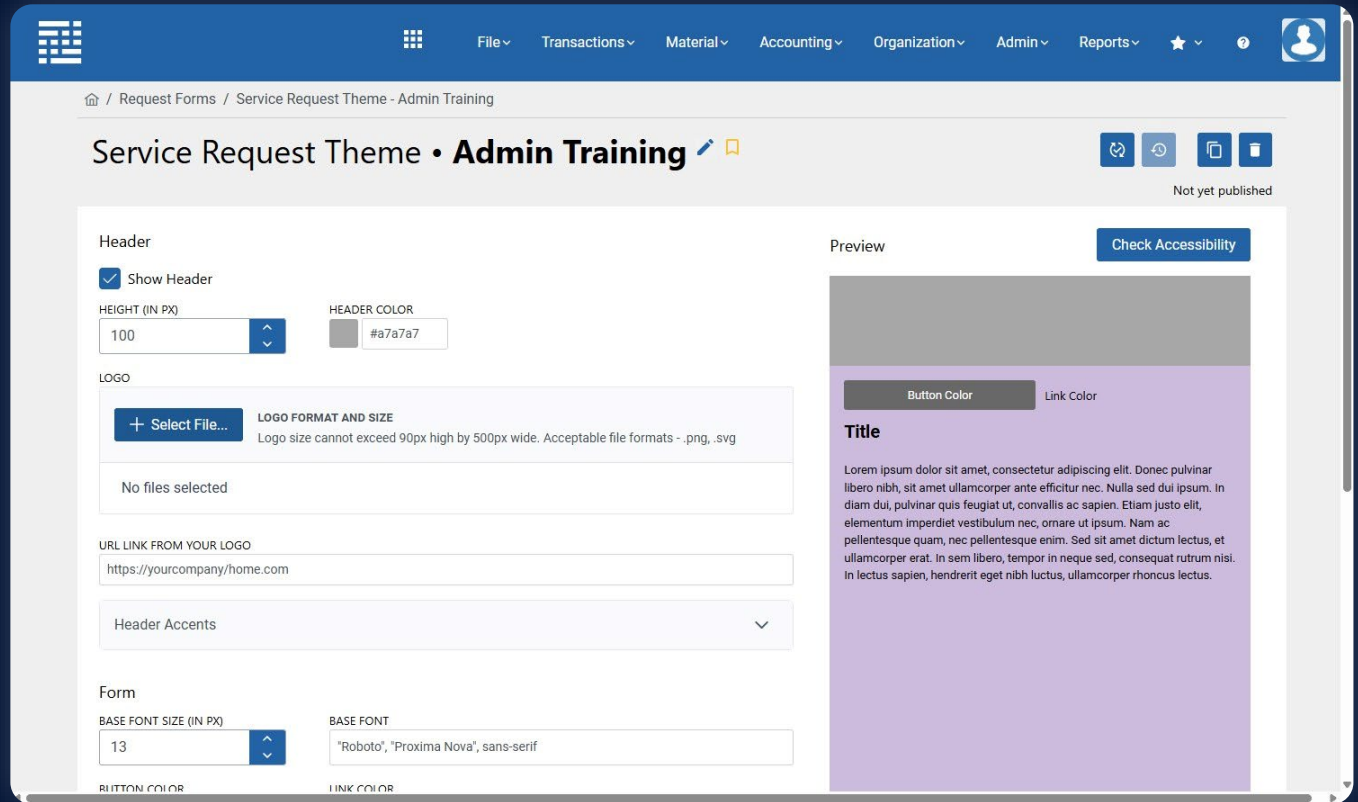
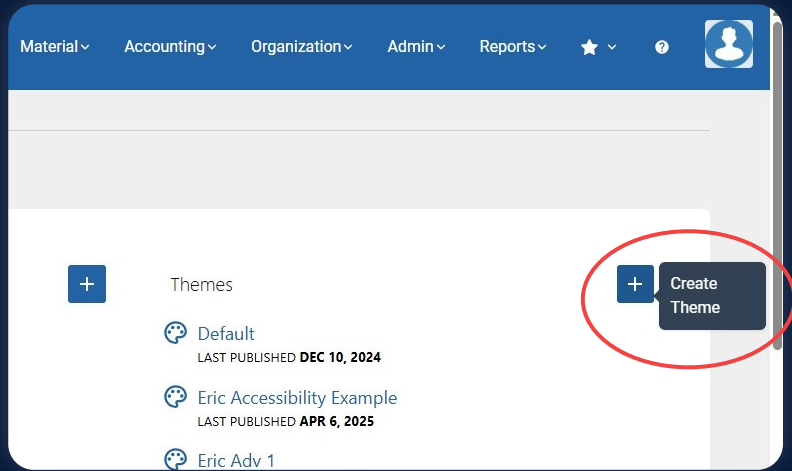
Select the SSO Login page that will be used for SSO access

Westminster ▾

Cancel Update Access



# Building the Themes



# Q&A



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Thank you



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