

## University Facilities

### WebTMA Requestor Training Manual

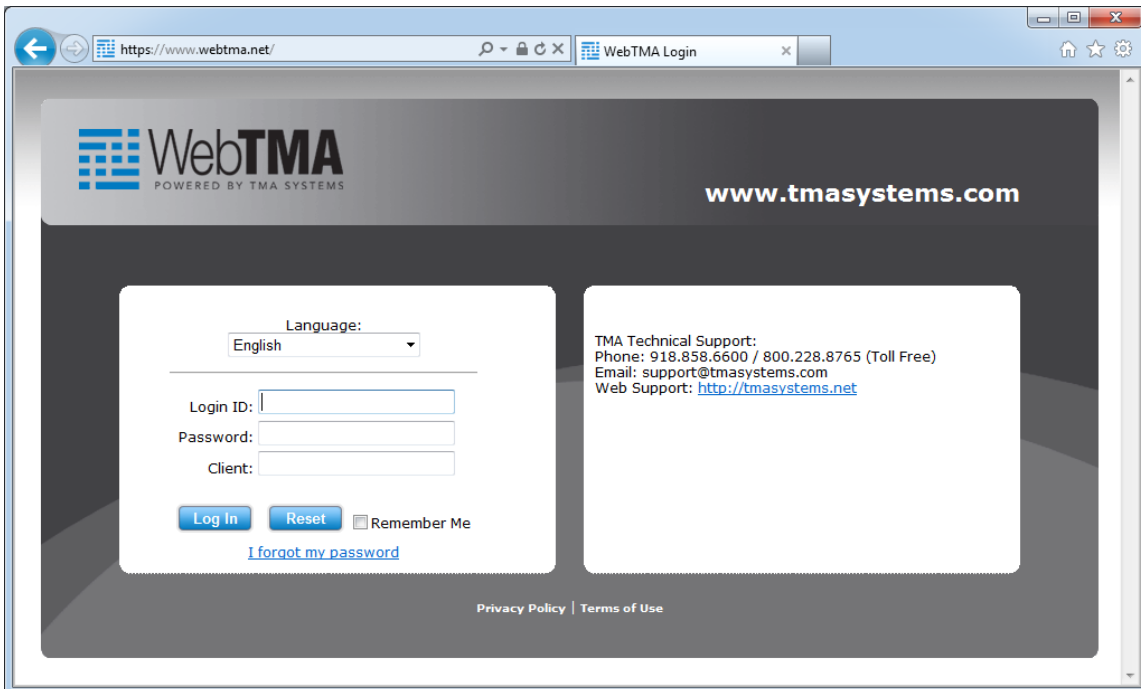
WebTMA is Drexel University's online work order management system. The following instructions will walk you through the steps on how to:

1. Submit a work request
2. Authorize chargeable work if you have been given that ability by your college/division
3. Check the status of a work request or work order
4. Change your password

Registered requestors log into the system by going to the website <http://www.webtma.net> and using your Drexel User-ID as the Login ID and the password that has been assigned to you. The client name is "drexel". **Once you are able to log-in with your credentials, you need to change your password.** Directions on how to do so are included in this training material.

Please note that any Drexel faculty member, professional staff, or affiliate can submit a simple, non-chargeable work request through the link on the University Facilities webpage at <http://www.drexel.edu/facilities/workOrders/> without having to log into WebTMA.

If you have any questions about your WebTMA account or the work order process, email [facilities@drexel.edu](mailto:facilities@drexel.edu). Password resets and system errors can be emailed to [tmapassword@drexel.edu](mailto:tmapassword@drexel.edu). To request access to WebTMA, complete the WebTMA Requestor Form on the University Facilities website and have it signed by the Business Manager in your college or division. Contact 215-895-1700 with questions.



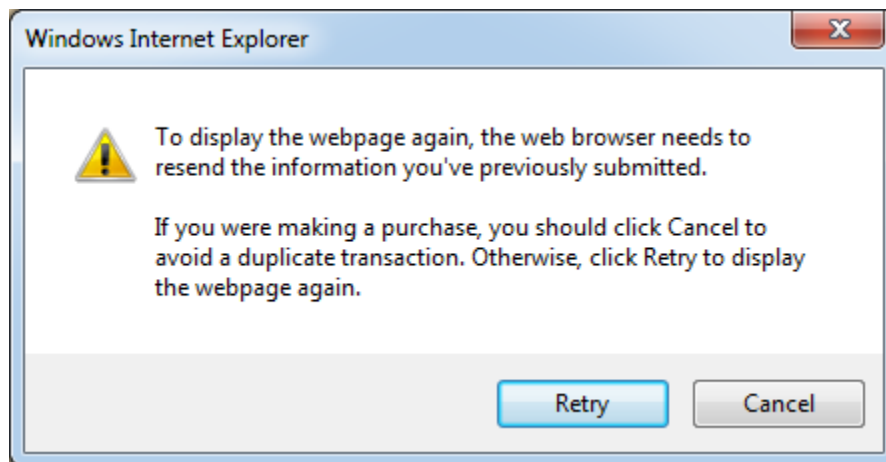
The screenshot shows a web browser window with the URL <https://www.webtma.net/>. The page features the WebTMA logo (POWERED BY TMA SYSTEMS) and the website [www.tmasystems.com](http://www.tmasystems.com). The login form includes a language dropdown menu set to "English", input fields for "Login ID:", "Password:", and "Client:", and buttons for "Log In", "Reset", and "Remember Me". A link for "[I forgot my password](#)" is also present. Technical support information is provided on the right, including phone numbers (918.858.6600 / 800.228.8765), email ([support@tmasystems.com](mailto:support@tmasystems.com)), and web support (<http://tmasystems.net>). At the bottom, there are links for "Privacy Policy" and "Terms of Use".

You may have a pop up blocker to disable once you've logged in. Follow the steps below to disable this feature.

- Right Click on the Yellow tool bar at the top of the page and select "Always allow Pop-Ups from this site".
- The box below will appear, and click YES.



- Then click on the Retry button when the message below appears. Your page will refresh and you will now be able to submit your request in the system.



- An additional window will appear and you have successfully logged in.

## How to Submit a Work Request in WebTMA

The system will automatically bring you to the below "Identity" tab with all of your information pre-populated. The items in RED are mandatory fields.

The screenshot shows the WebTMA 5.0.2 interface in a Windows Internet Explorer browser window. The page title is "Work Request B" and the user is logged in as Christopher Plummer (crp24r). The interface includes a navigation menu on the left with options like "Action Menu", "Requestor Nav", and "Tutorials". The main content area is divided into two columns: "Requestor Information" and "Request Information".

**Requestor Information:**

- Request Date:** 03/20/2012 14:58 (Mandatory field, highlighted in red)
- Requestor Name:** Christopher Plummer (Mandatory field, highlighted in red)
- Phone #: [Empty field]
- Requestor E-mail: crp24@drexel.edu
- Request Copy To: [Empty field]
- Notify Me:
- Action Requested:** [Empty text area]
- Additional Comments:** [Empty text area]

**Request Information:**

- Request Type Desc:** Service Request (Mandatory field, highlighted in red)
- Department Name: SVP Student Life & Admin
- Account #: [Empty field]
- Location ID: [Empty field]
- Campus Name:** [Empty field] (Mandatory field, highlighted in red)
- Building Name:** [Empty field] (Mandatory field, highlighted in red)
- Floor Code: [Empty field]
- Area: [Empty field]

1. Be sure that the Notify Me box is checked before you submit your request if you want to keep track of your request via email notifications. You will receive an email when the request is moved to a different status. A copy of these emails can be sent to another person as well. Simply enter their email address in the "Request Copy To" field.
2. Leave Account # blank until you enter the building information. Once the Building Name has been selected, your default account number for billable work orders will be automatically populated in the "Account #" field. If you need to choose a different cost center to charge, you may select it from the drop down list. All requests will have an account number associated with it regardless of if the request is for chargeable work or not.
3. "Campus Name" will be defaulted to your campus.
4. Click on the "Building Name" drop-down box to select a building. You may have access to submit a request for any building on campus, or you may have limited access and can only select from the buildings shown.
5. Select the "Floor Code" and "Area" (room) if you have that information available.
6. Enter a description of the work you need completed in the "Action Requested" box. Make sure to be as detailed as possible.
7. Click the "SAVE" button in the top right corner of the screen.

After you click "SAVE" you will receive a confirmation message with your assigned request number. This means your request has been sent the Dispatch Center for review.

### How to Authorize a Work Request in WebTMA

Each college/department has a business person designated to authorize chargeable work orders submitted by non-registered faculty and staff through the Facilities website. Work requests charged to grants will also be routed to the Office of Research for approval before becoming a work order.

The Facilities dispatchers will route these requests to these approvers, who will receive an email notifying them that they have a request pending authorization. To view these, click on the "Pending Authorization" tab.

The screenshot displays the WebTMA 5.0.2 interface for a user named Christopher Plummer (crp24r) in a Windows Internet Explorer browser. The main window title is "WebTMA 5.0.2 - Drexel University - Christopher Plummer (crp24r) - Windows Internet Explorer". The URL is "http://app2.webtma.net/Drexel/MainApp.aspx?windowID=99382873277047e7935c6249f4e1e0b5". The interface features a navigation menu on the left with options like "Home", "Logout", "Add", "Edit", "Copy", "Delete", "First", "Prev", "Next", "Last", "Search", "Print", "Help", "Save", and "Cancel". The main content area is titled "Work Request B" and is divided into tabs: "Identify", "Status", "Pending Authorization", and "Browse". The "Pending Authorization" tab is active, showing a form for a work request. The form includes the following fields and values:

- Room: UC019-0425
- Item: (empty)
- Department: (empty)
- Priority: Routine
- Request: The toilet is leaking when you flush it. It is leaking in the piping.
- Work Order #: FM-9001
- Request Date: 11/29/2011 11:05
- Repair Center: FM
- WO Type: Service Request
- Requestor: Tammy Hilmer
- Phone: 9999
- Account #: (empty)

Below the form, there is a "Task" dropdown menu set to "240110(Construct or Build)" and a "Comment" field containing "Christopher Plummer (2012/03/20 15:39) --". At the bottom of the form, there are three buttons: "Authorize", "Reject", and "Ignore". The interface also includes a "Requestor Nav" and "Tutorials" section on the left side.

It is then the responsibility of the approver to click either the "Authorize" or "Reject" button. If Authorize is selected, a valid cost center number must be provided in the Comments field, as well as any special instructions or limitations.

The original requestor will receive email notification of this status as well.

As a Registered Requestor you have already been given the authority to submit chargeable work requests by the Business Manager in your college/division. It is your responsibility to make sure you are appropriately charging work to account numbers and areas for which you have the authority and oversight of.

## How to Check the Status in WebTMA

Once your work request is saved, a dispatcher will either accept it or reject it. Once accepted, it will be converted to a Work Order and assigned a Work Order Number.

Click on the "Browse" tab to view all Open Requests, Rejected Requests, Open Work Orders, or Closed Work Orders. If you know the request or work order number, you can also enter it on the "Status" tab to view detailed information on your request.

Depending on the access given to you by your college/division, you may either have the ability to only view the status of the requests that you submitted, or you may be able to see all of the requests within a certain building(s).

In addition, if you selected the "Notify Me" box, you will receive an email when the request is accepted or rejected, if it is placed on hold, and when the work is completed.

If there are any questions regarding your request, one of our Dispatchers or Managers will contact you for clarification or feel free to call University Facilities at 215-895-1700.

The screenshot displays the WebTMA 5.0.2 application interface. The browser title is "WebTMA 5.0.2 - Drexel University - Christopher Plummer (crp24r)". The URL is "http://app2.webtma.net/Drexel/MainApp.aspx?windowID=99382873277047e7935c6249f4a4e0b5". The page features a navigation menu with "Home" and "Logout" options. The main menu includes "Identity", "Status", "Pending Authorization", and "Browse". The "Browse" tab is selected, showing a dropdown menu with options: "Open Requests", "Rejected Requests", "Open Workorders", and "Closed Workorders". Below the dropdown is a table with columns: "Status", "Repair Center", "Item", "Item Code", and "Item Description". The table is currently empty. The bottom of the page shows "Requestor Nav" and "Tutorials" sections, and a status bar indicating "1 items in 1 pages".

## How to Change Your WebTMA Password

- Select File at the top of your screen. Scroll to Personal Info

The screenshot shows the 'Work Request B' interface. The 'File' menu is open, and 'Personal Info' is highlighted with a red arrow. The main content area is divided into two sections: 'Requestor Information' and 'Request Information'.

Requestor Information	Request Information
Request Date: 03/20/2012 09:32	Request Type Desc: Service Request
Requestor Name: Joe User	Department Name: Information Resources & T
Phone #: 215-895-2000	Account #:
Requestor E-mail: tw35@drexel.edu	Location ID:
Request Copy To:	Campus Name:
Notify Me <input checked="" type="checkbox"/>	Building Name:
Action Requested	Floor Code:
	Area:

- Select Edit

The screenshot shows the 'Personal Info' interface. The 'Edit' button in the toolbar is highlighted with a red arrow. The form contains the following fields:

Login ID:	tw35r	Initials:	
Password:	••••••••	E-mail:	juser35@drexel.edu
Password Confirm:	••••••••	Phone #:	215-895-2000
First Name:	Joe	Fax #:	
Last Name:	User		

- Change Password and Save

The screenshot shows the 'Personal Info' interface. The 'Password' and 'Password Confirm' fields are highlighted in yellow. The 'Save' button in the toolbar is also highlighted with a red arrow. The form contains the following fields:

Login ID:	tw35r	Initials:	
Password:	••••••••	E-mail:	juser35@drexel.edu
Password Confirm:	••••~•••	Phone #:	215-895-2000
First Name:	Joe	Fax #:	
Last Name:	User		

- Enter the original password when prompted and then click OK

