

Physical Facilities Material Request

This document provides an overview of entering a Physical Facilities material request.

To access this application navigate to <https://pfocma.uakron.edu/tmalogin/login.aspx>


There is also an online tutorial available which accompanies this manual. Please navigate to <http://www.uakron.edu/training/physical-facilities-work-requests--.dot> and select the link for "Tutorial: Add a Work Order Request".

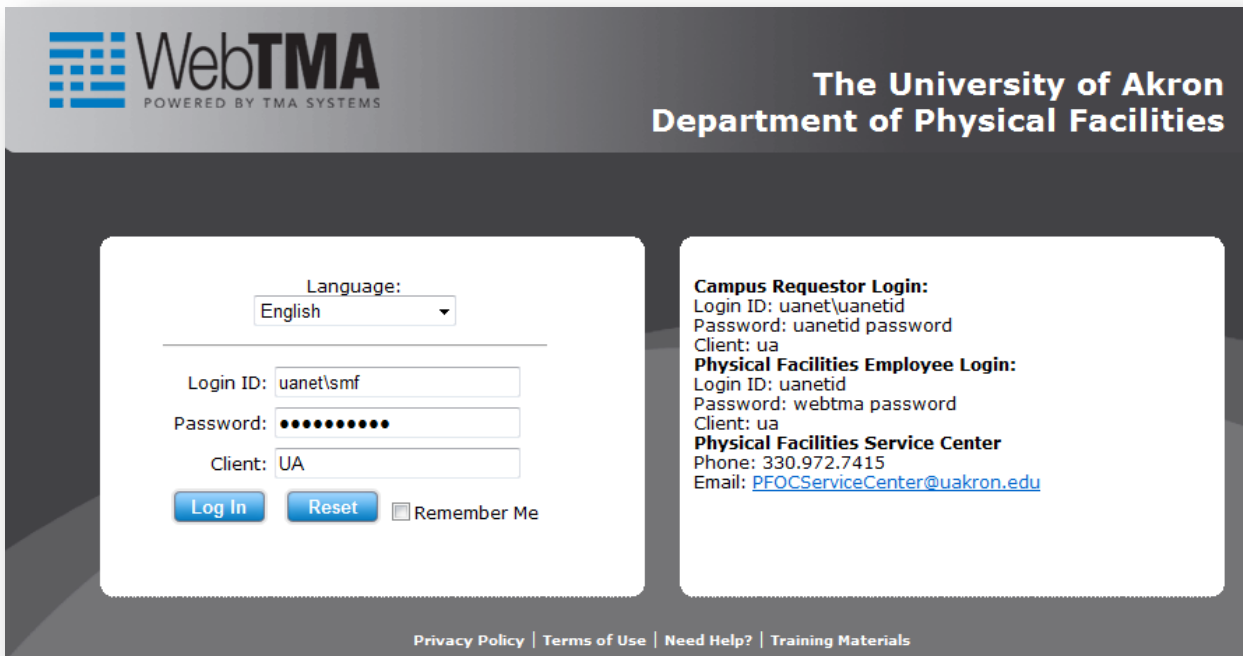
Important Guidelines:

- ✓ When logging into WebTMA, make sure the client is UA.

Enter a Material Request

Instructions:

1. Navigate to the application by using any of the following methods:
 - a. Open your web browser and enter the following web address:
<https://pfocma.uakron.edu/tmalogin/login.aspx>
 - b. Open your web browser and enter the following web address:
www.uakron.edu/pfoc and click on the link - *Submit Work Request*.
2. Use your University of Akron UANetID and password to log in.
 - a. Login ID = uanet\your **UANetID** (for example: uanet\smf)
 - b. Password = **this will be your network password**
 - c. Client = UA
3. Click the  button.



WebTMA
POWERED BY TMA SYSTEMS

The University of Akron
Department of Physical Facilities

Language: English

Login ID: uanet\smf

Password: ●●●●●●●●

Client: UA

Remember Me

Campus Requestor Login:
Login ID: uanet\uanetid
Password: uanetid password
Client: ua

Physical Facilities Employee Login:
Login ID: uanetid
Password: webtma password
Client: ua

Physical Facilities Service Center
Phone: 330.972.7415
Email: PFOServiceCenter@uakron.edu

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Instructions:

4. The **Requester Page** loads. You will need to click "**Requester Nav**" located in the far left of the menu (at the bottom).

The screenshot shows the WebTMA Work Request interface. The top navigation bar includes 'File' and 'Help'. The main header displays 'WebTMA POWERED BY TMA SYSTEMS' and 'Work Request'. Below the header is a toolbar with icons for 'Add', 'Edit', 'Copy', 'Delete', 'First', 'Prev', 'Next', 'Last', and 'Search'. The left sidebar contains an 'Action Menu' with 'Linked Documents' and 'Last Modified' options. The main content area is divided into two columns: 'Requestor Information' and 'Request Information'. The 'Requestor Information' section includes fields for 'Request Date' (06/15/2012 08:41), 'Requestor Name' (Susan M McKibben), 'Phone #' (6391), 'Requestor E-mail' (smf@uakron.edu), 'Request Copy To', 'Status', and a 'Notify Me' checkbox. The 'Request Information' section includes 'Request Type' (Web), 'Department', 'Repair Center Name', 'Account', 'Area' (LIB-52), and 'Select Item'. Below these sections are 'Action Requested' and 'Additional Comments' text areas. The 'Requester Nav' button in the left sidebar is circled in black.

Instructions:

- Click the "Material Request" link.

File Help

WebTMA
POWERED BY TMA SYSTEMS

Work Request

Home Logout Add Edit Copy Delete First Prev

Action Menu

Requestor Nav

WO Request A

Material Request

Identity Status Pending Authorization Browse

Requestor Information

Request Date: 06/15/2012 08:41

Requestor Name: Susan M McKibben

Phone #: 6391

Requestor E-mail: smf@uakron.edu

- The **Requester Page** loads. Notice the following fields are automatically entered for you: **Requester/Phone # and Order Date.**

Add Edit Copy Delete First Prev Next Last Search Print Help Save Cancel

Identity Comments Ship To Approval Routing History Browse

Department Code: ...

Sales Type Code: ...

Speedtype: ...

Requestor/Phone #: Susan M McKibben ... 6391

Repair Center Code: ...

Status Desc: ...

Request #:

Order #:

Order Date: 06/15/2012

Required:

Ref Number:


Ship Via:

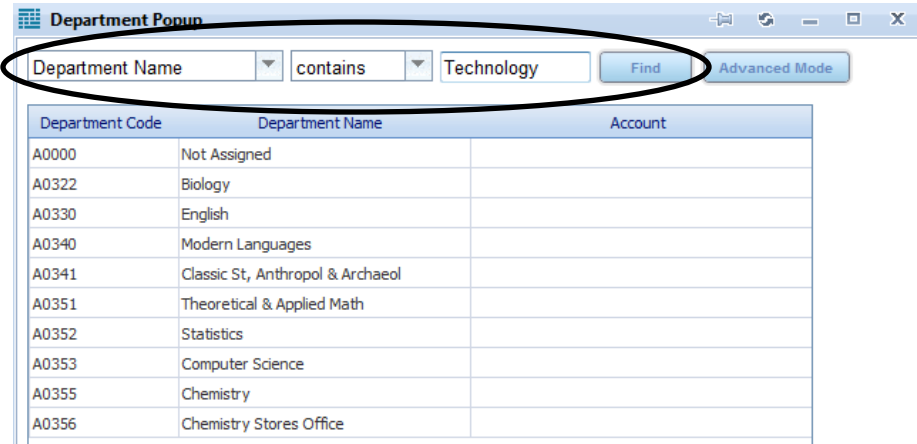
Add Material Request Line

Part Code	Part Description	Quantity	UOM	Unit Cost	Extended	Manufacturer Name
No records to display.						

Field names which are in **red** denote **required** fields. ***Data must be entered in the red fields in order to save the request.*** All other information is optional.

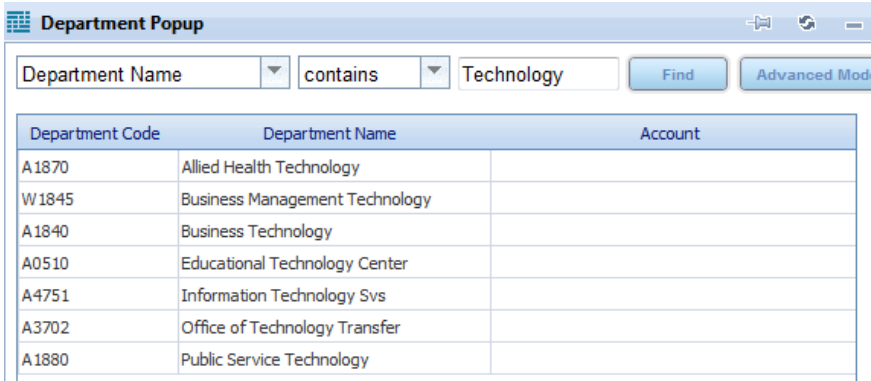
Instructions:

7. Enter the **Department Code**. If you know the Department Code, type it in the box or select it from the drop down. Hit the **TAB** key and the Department Name will auto-fill to the right of the Department Code.
 - a. If you do not know the Department Code, click the  icon and search for your Department.
 - b. Select **Department Name** from the first drop down. The second search box will automatically default to "contains."
 - c. Enter a portion of your department name. For example, to search for Information Technology Services, enter "Technology" in the search box.
 - d. Click the **Find** button.



Department Code	Department Name	Account
A0000	Not Assigned	
A0322	Biology	
A0330	English	
A0340	Modern Languages	
A0341	Classic St, Anthropol & Archaeol	
A0351	Theoretical & Applied Math	
A0352	Statistics	
A0353	Computer Science	
A0355	Chemistry	
A0356	Chemistry Stores Office	

- e. A list of Departments matching your search criteria is returned. Select the appropriate department from the list by double-clicking on either the code or the name.



Department Code	Department Name	Account
A 1870	Allied Health Technology	
W 1845	Business Management Technology	
A 1840	Business Technology	
A0510	Educational Technology Center	
A4751	Information Technology Svs	
A3702	Office of Technology Transfer	
A 1880	Public Service Technology	

TIP: Once you find your Department Code, make a note of the number so you will have it available for your next request.

Instructions:

8. Select **_DEPARTMENT** from the Sales Type Code drop-down. This will be the first entry in the drop-down list.

Identity | Comments | Ship To | Approval Routing History | Browse

Department Code: **A4751** Information Technology Svs

Sales Type Code: **_DEPARTMENT** _DEPARTMENT

Speedtype: _____

Requestor:/Phone #: **Susan M McKibb** 6391

Repair Center Code: _____

Status Desc: _____

Request #: _____

Order #: _____

Order Date: **06/18/2012**

Required: _____

Ref Number: _____

Ship Via: _____

9. Enter your **SpeedType** from the drop-down list. You can type the number and it will find the speedtype in the list. Hit the **TAB** key after entering the SpeedType and the Account Name will auto-complete to the right of the number.

Identity | Comments | Ship To | Approval Routing History | Browse

Department Code: **A4751** Information Technology Svs

Sales Type Code: **_DEPARTMENT** _DEPARTMENT

Speedtype: **200704** Software Training Svcs

Requestor:/Phone #: **Susan M McKibb** 6391

Repair Center Code: _____

Status Desc: _____

Request #: _____

Order #: _____

Order Date: **06/18/2012**

Required: _____

Ref Number: _____

Ship Via: _____

Part Code	Part Description	Quantity	UOM	Unit Cost	Extended	Manufacturer Name
No records to display.						

10. Select the **Repair Center Code** from the drop-down.
 - a. If ordering from Central Stores (i.e. paper or ink/toner), select **CSTORE**.
 - b. If ordering from Physical Facilities, select **PFOCSC**.

Identity | Comments | Ship To | Approval Routing History | Browse

Department Code: **A4751** Information Technology Svs

Sales Type Code: **_DEPARTMENT** _DEPARTMENT

Speedtype: **200704** Software Training Svcs

Requestor:/Phone #: **Susan M McKibb** 6391

Repair Center Code: **CSTORE** Central Stores

Status Desc: _____

Request #: _____

Order #: _____

Order Date: **06/18/2012**

Required: _____

Ref Number: _____

Ship Via: _____

Part Code	Part Description	Quantity	UOM	Unit Cost	Extended	Manufacturer Name
No records to display.						

Instructions:

11. Next, enter the items you need to order. Click the **Add Material Request Line** link.

The screenshot shows the 'Materials Request Entry' form with several tabs: Identity, Comments, Ship To, Approval Routing History, and Browse. The 'Identity' tab is active. The form contains the following fields:

- Department Code: A4751 (Information Technology Svs)
- Sales Type Code: DEPARTMENT
- Speedtype: 200704 (Software Training Svcs)
- Requestor/Phone #: Susan M McKibb (6391)
- Repair Center Code: CSTORE (Central Stores)
- Status Desc: (empty)
- Request #: (empty)
- Order #: (empty)
- Order Date: 06/18/2012
- Required: (empty)
- Ref Number: (empty)
- Ship Via: (empty)

The 'Add Material Request Line' link is circled in red. Below the form is a table with the following columns: Part Code, Part Description, Quantity, UOM, Unit Cost, Extended, and Manufacturer Name. The table currently displays 'No records to display.'

12. The Material Request Entry displays. Enter the **Part** number for the item you wish to order. If you are ordering paper or toner, refer to the printed Inventory Forms (which you submitted in the past) and enter the **Stock#** of the item. If you do not have the Stock# available, refer to Step 16 for instructions on searching for the stock#.

13. As you start typing, the drop-down list will find the part. For example, type "103000" for an HP Inkjet, Black #94, HEWC8765WN. Note that the part numbers contain a suffix – such as "-CST", for Central Stores. **You must select the part number that includes the suffix. For paper and ink/toner cartridges, this will always be the -CST suffix.**

Press the TAB key and the description of the part will auto-fill. Verify this is the correct item.

14. Enter the **Quantity** you wish to purchase. Note the **Unit Cost** displays below. This reflects the cost per UNIT. In the example below, we are purchasing 2 cartons, and the price per carton is \$17.9475.

15. Click the **Save** button.

The screenshot shows the 'Material Request Entry' form with the following fields filled:


- OTI:
- Part: 103000-CST (CARTRIDGE, TONER HP INK JET)
- Quantity: 2 *(1/CTN)
- Unit Cost: 17.9475

Buttons for 'Save' and 'Close' are visible at the bottom.


If you are ordering paper or ink/toner cartridges, the Part number will always end with the suffix "-CST". **You must include the suffix on the Part number.**

Instructions:

16. If you are NOT ordering paper or ink/toner cartridges, or, if you do NOT know the part number, follow these steps:

17. Click the  icon to search for the part number.

OTS

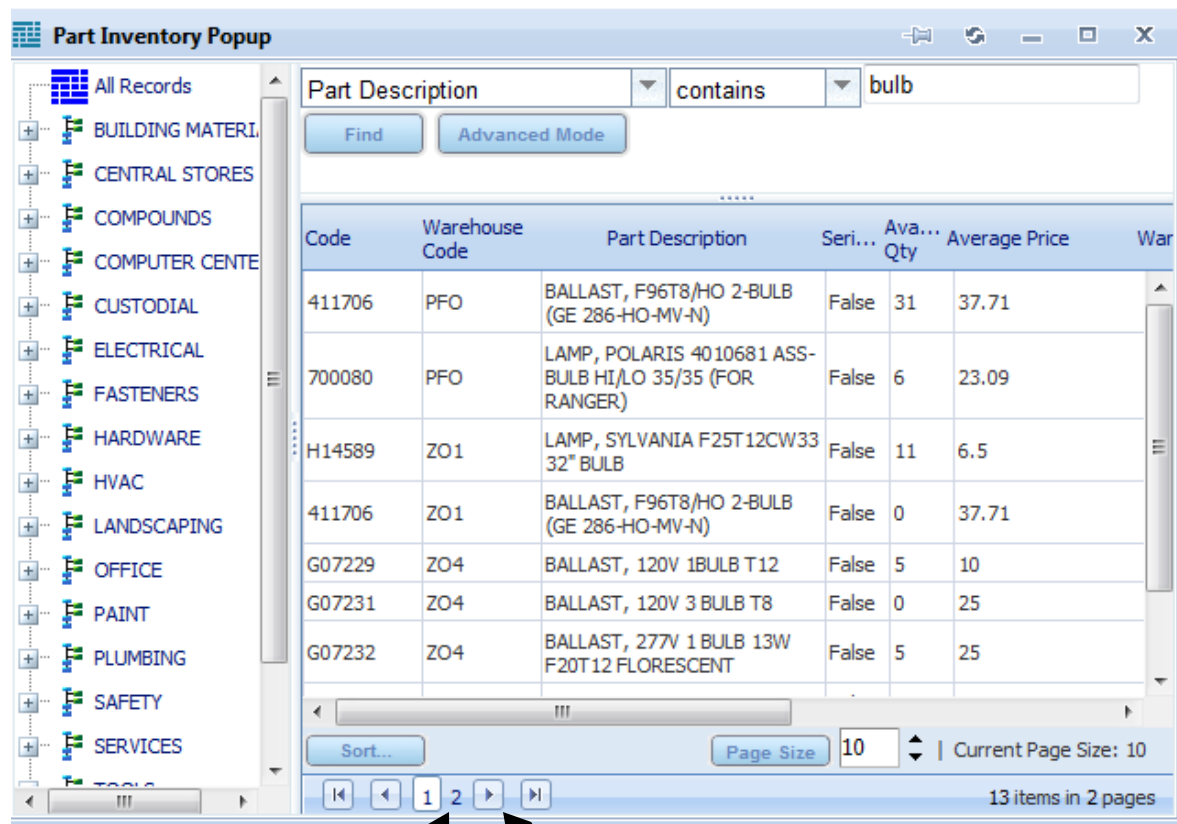
Part: 

Quantity:

Unit Cost:

18. Select the first drop down and select Part Description. The second box will change to "contains". Type a keyword for the item you wish to purchase. For example, type "bulb" to search for light bulbs. Click the **Find** button.

19. All the items which contain the word within the Parts Description will display. You may need to use the scroll bar and/or the navigation buttons to view all the records.




The screenshot shows the 'Part Inventory Popup' window. The search criteria are set to 'Part Description' contains 'bulb'. The results table is as follows:

Code	Warehouse Code	Part Description	Seri...	Ava... Qty	Average Price	War
411706	PFO	BALLAST, F96T8/HO 2-BULB (GE 286-HO-MV-N)	False	31	37.71	
700080	PFO	LAMP, POLARIS 4010681 ASS-BULB HI/LO 35/35 (FOR RANGER)	False	6	23.09	
H14589	ZO1	LAMP, SYLVANIA F25T12CW33 32" BULB	False	11	6.5	
411706	ZO1	BALLAST, F96T8/HO 2-BULB (GE 286-HO-MV-N)	False	0	37.71	
G07229	ZO4	BALLAST, 120V 1BULB T12	False	5	10	
G07231	ZO4	BALLAST, 120V 3 BULB T8	False	0	25	
G07232	ZO4	BALLAST, 277V 1 BULB 13W F20T12 FLORESCENT	False	5	25	

At the bottom of the window, there are navigation buttons: a 'Sort...' button, a 'Page Size' dropdown set to 10, and a 'Current Page Size: 10' indicator. Below these are page navigation buttons: a left arrow, a '1' button, a '2' button, a right arrow, and a 'Next Page' button (a right arrow with a page icon). The status bar at the bottom right indicates '13 items in 2 pages'.

Click "2" to view the second page of results.

Click the next page  button to view the next page.

Instructions:

20. Once you find the item, double click on any field for that particular item and it will automatically update the part number.
21. Enter the **Quantity** you wish to purchase.
22. Click the **Save** button.

Material Request Entry

OTS

Part: 700080-PFO ... LAMP, POLARIS 4010681 ASS-BL

Quantity: 6 *(1/Each)

Unit Cost: 23.09

Save Close

23. The Request returns with the line item displayed. Note the **Extended** field – this is the Quantity * Unit Cost.
24. If you have more items to order, click the **Add Material Request Line** link and repeat the steps to add a line item.

Identity | Comments | Ship To | Approval Routing History | Browse

Department Code: A4751 ... Information Technology Svs

Sales Type Code: DEPARTMENT ... DEPARTMENT

Speedtype: 200704 ... Software Training Svcs

Requestor:/Phone #: Susan M McKibb ... 6391

Repair Center Code: CSTORE ... Central Stores

Status Desc: []

Request #: []

Order #: []

Order Date: 06/18/2012

Required: []

Ref Number: []


Ship Via: []

Add Material Request Line							
Part Code	Part Description	Quantity	UOM	Unit Cost	Extended	Manufacturer Name	
103000-CST	CARTRIDGE, TONER HP INK JET BLACK #94 HEWC8765WN	2.00	CTN	17.9475	35.90		

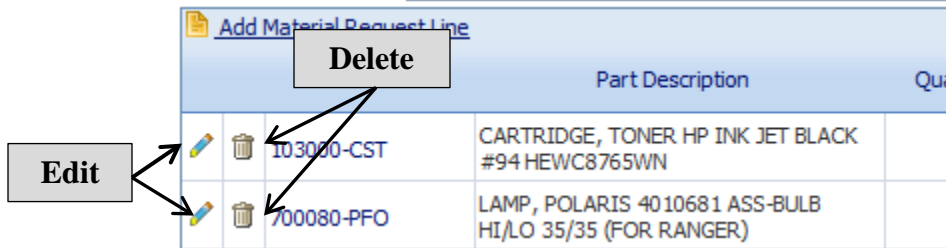
1 items in 1 pages

Estimate Total: 35.90





Instructions:

25. To delete a line item, click the trash can icon  next to the item you wish to delete.

26. To edit an item, click the pencil icon  next to the item you wish to edit.

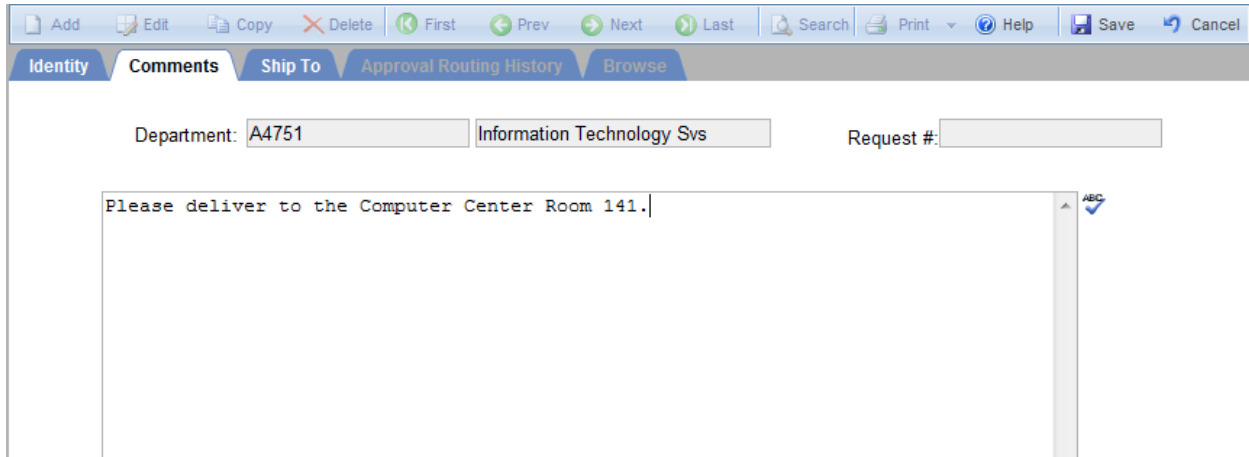


The screenshot shows a table titled "Add Material Request Line" with columns for "Part Description" and "Quantity". Two rows are visible:

	Part Description	Quantity
  103000-CST	CARTRIDGE, TONER HP INK JET BLACK #94 HEWC8765WN	
  700080-PFO	LAMP, POLARIS 4010681 ASS-BULB HI/LO 35/35 (FOR RANGER)	

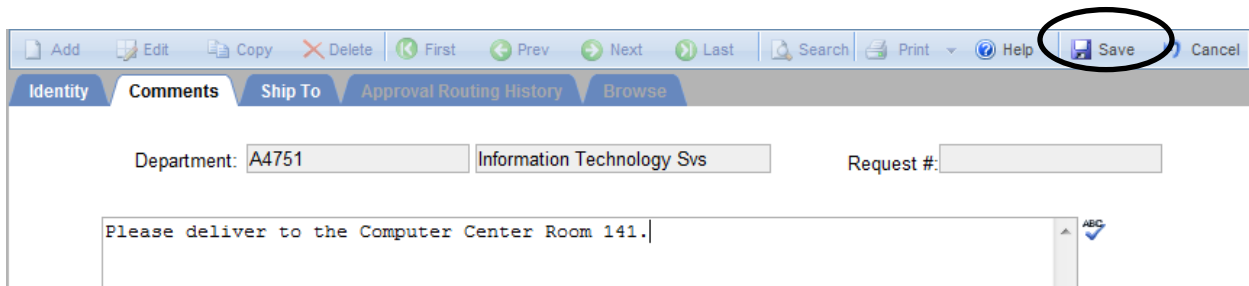
Callouts indicate that the pencil icon is used for "Edit" and the trash can icon is used for "Delete".

27. Once all the line items are entered, click the **Comments** tab and enter the Building and Room number where the items should be delivered.



The screenshot shows the "Comments" tab selected. The form includes fields for "Department: A4751 Information Technology Svs" and "Request #:". A text area contains the comment: "Please deliver to the Computer Center Room 141." The "Save" button is visible in the top right corner.

28. Click the **Save** button to save the request.



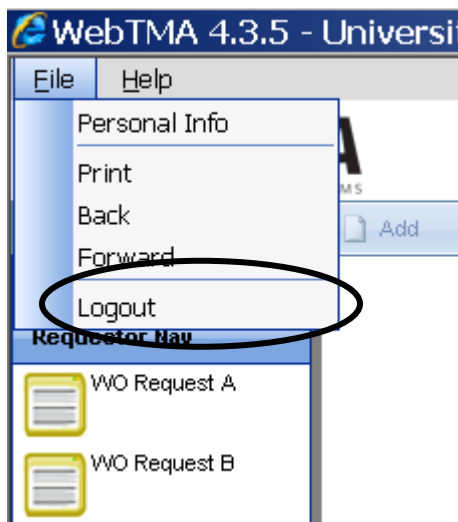
This screenshot is identical to the previous one, but the "Save" button in the top right corner is circled in black to indicate the next step.

Instructions:

29. Your screen will refresh and a message returns, indicating the Request has been submitted. Note the Request Number.

The screenshot shows a web application interface with a toolbar at the top containing icons for Add, Edit, Copy, Delete, First, Prev, Next, Last, and Search. Below the toolbar are tabs for Identity, Comments, Ship To, Approval Routing History, and Browse. A message box at the top left states: "Your request 10 has been sent on 06/15/2012". Below this message is a form with the following fields: Department Code, Sales Type Code, Speedtype, Requestor:/Phone #: Susan M McKib, Repair Center Code, and Status Desc. A callout box points to the message with the text: "Message indicating the request has been submitted and the request number assigned."

30. When finished, select **File - Logout** from the menu.



For questions regarding Materials Requests, please contact John Tompkins at extension 6147 or via email at jct@uakron.edu