



WEB REQUEST

How to Create/Edit/Use Web Request Pages

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Introduction

Purpose

This document aims to address common questions and concerns regarding TMS Web Request, including Queries, Defaults, Update All Modes, Header/Footers, and Properties.

The following is designed to help utilize Web Request to the extent of its customization.

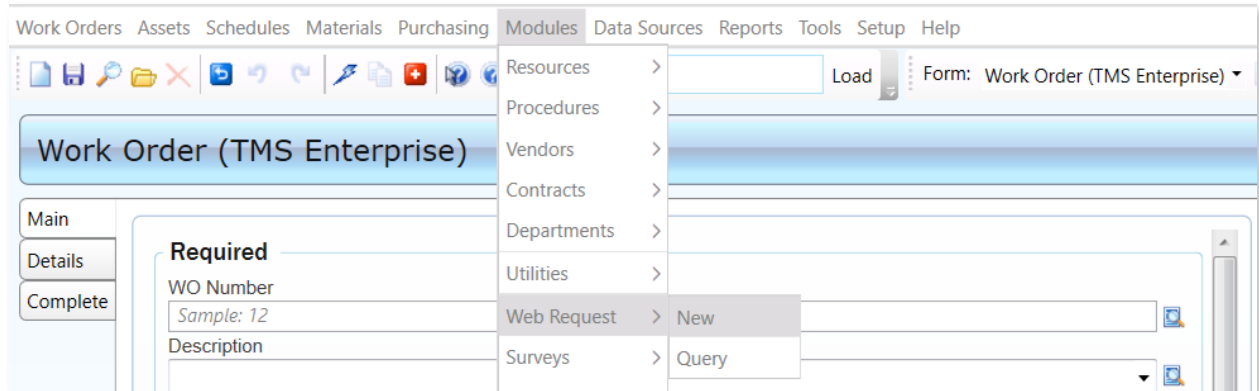
What is Web Request?

Web Request is a module within TMS that allows you to build and design a web page that can be used outside of the core TMS application for submitting work orders/assets as well as query for work orders/assets without requiring a TMS login.

Web Request

How to Access the Web Request Module

Go to Modules > Web Request > New/Query

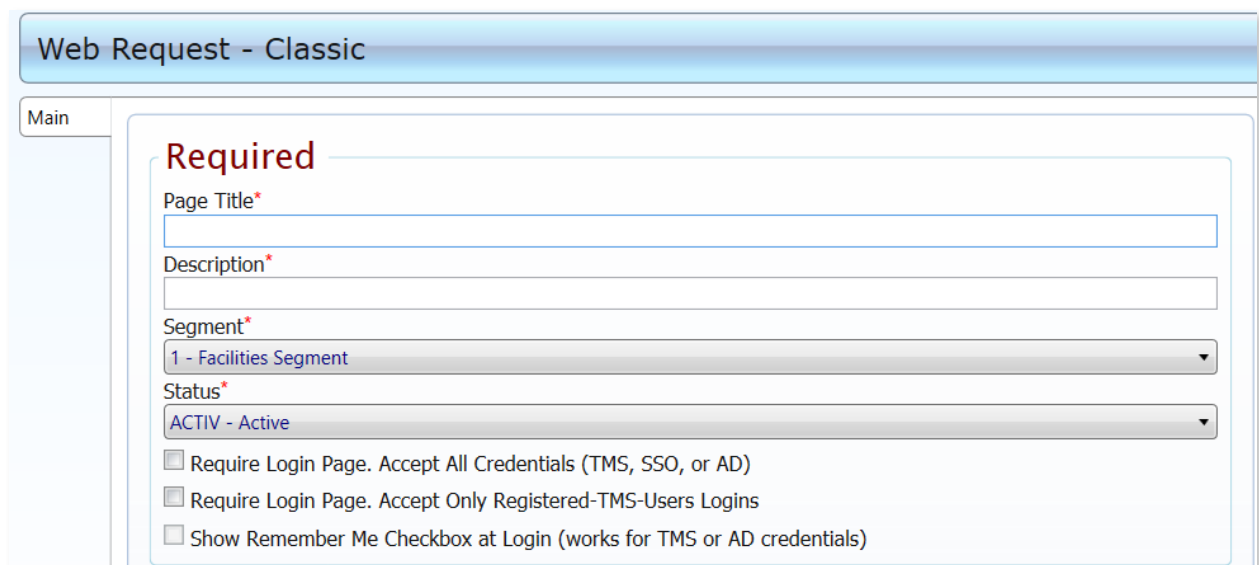


Web Request > New for when you need to create a new Web Request Profile.

Web Request > Query to open or edit an existing Web Request Profile.

How to Create a New Web Request Profile

Go to Web Request > New:



Page Title: Determines the text that will display at the top of the Web Request page.

Description: How the Web Request Profile displays within the TMS application. This field is to help you identify the pages you build internally.

Segment: The segment the Web Request will be saved in, and in turn have access to.

Status: Determines whether the Web Request can be used.

- **ACTIV - Active:** Can be used and accessed.

- **INACT - Inactive:** Cannot be accessed. Used to retire a WR or take one offline for editing.

Optional - Checkboxes (Logging into Web Request)

Require Login Page. Accept All Credentials (TMS, SSO or AD)

If your organization uses Active Directory (AD) or Single Sign-On (SSO), and has purchased the module for TMS, users without TMS credentials can use their AD/SSO credentials to access Web Request.

Require Login Page. Accept Only Registered-TMS-Users Logins

Limits the Web Request access to those who have a user created in the TMS database and can log in to the core TMS application.

With this option enabled, users from the organization with no experience logging into TMS will not be able to log in to Web Request to submit Work Orders.

Show Remember Me Checkbox at Login (works for TMS or AD credentials)

If you choose either of the above options, you can check this box to allow users to save their credentials to the login page, so they will be automatically logged into the Web Request page when accessing it.

Once you have filled out the required fields (marked with a “*”) Click the Save icon.

Work Order Settings

After saving you will see 2 new tabs available on the left of the screen:

Web Request - Classic *

Main

Work Order Settings

Asset Settings

Required

URL
<https://supportupgradetest.tmsonline.com/webrequest/default.aspx?p=861&s=iFeSFnrSTUIMsFH/EfR>

Page Title*
Web Request Page

Description*
This is a Web Request Page.

Segment
1 - Facilities Segment

Status*
ACTIV - Active

Require Login Page. Accept All Credentials (TMS, SSO, or AD)

Require Login Page. Accept Only Registered-TMS-Users Logins

Show Remember Me Checkbox at Login (works for TMS or AD credentials)

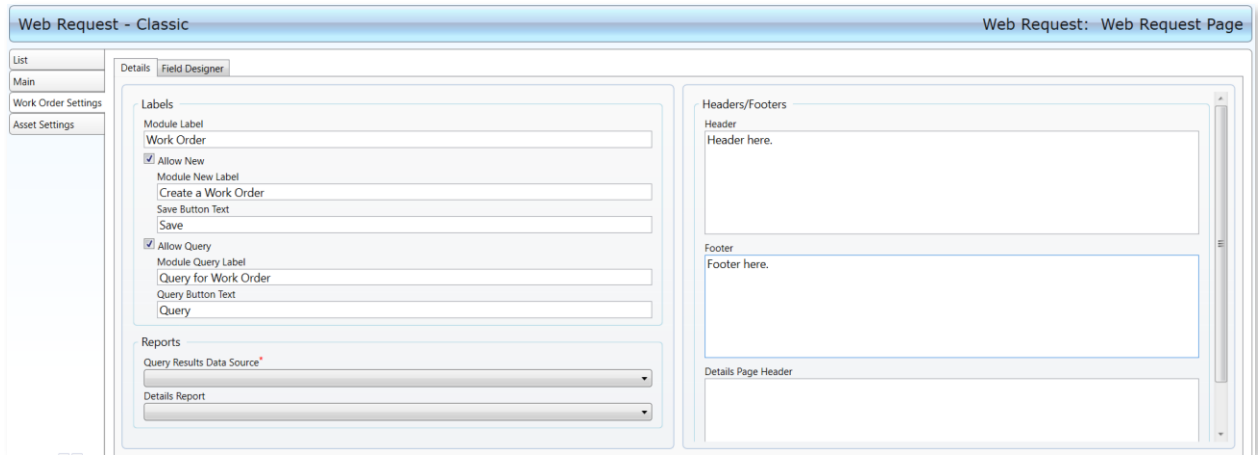
Work Order Settings: Allows you to edit how users can submit or query for Work Orders.

Asset Settings: Allows you to edit how users can submit/query for Assets.

Both the *Work Order Settings* and the *Asset Settings* tabs utilize the same functionality; thus, we will cover how to use the *Work Order Settings* tab only.

The Details Tab

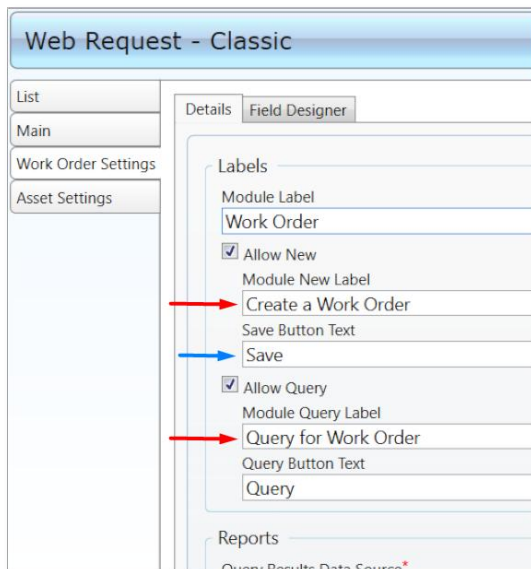
The below image shows the default version of the fields available under the Details Tab:



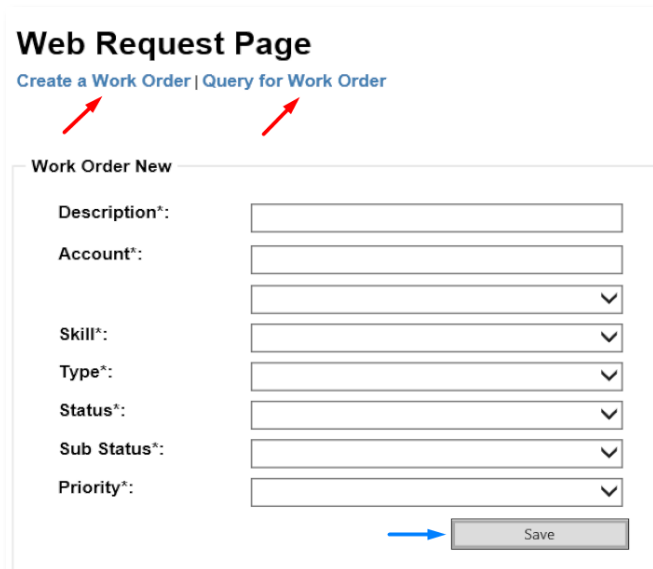
For now, we will focus on the two windows:

1: Labels: Determine the text that displays on section titles and buttons.

TMS Interface

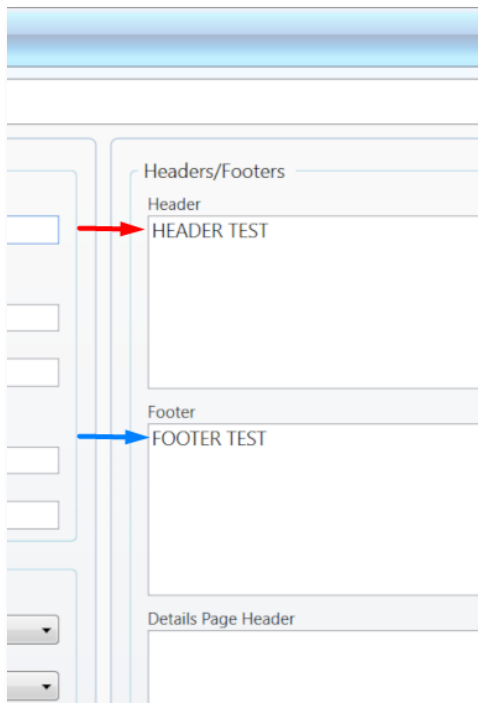


Web Request Page



2: Header/Footer: Determines what the page header and footer display.

TMS Interface



Web Request Page

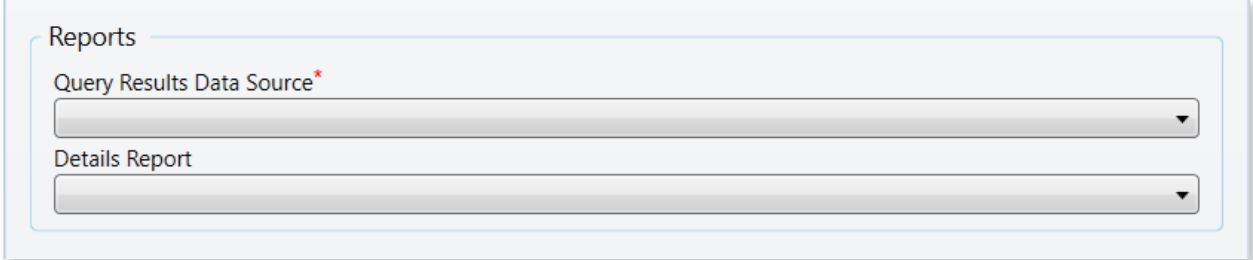
The screenshot shows the Web Request Page form. The page title is 'Web Request Page'. Below the title, there are two links: 'Create a Work Order' and 'Query for Work Order'. A red arrow points to the 'HEADER TEST' text above the form. The form itself is titled 'Work Order New' and contains several fields: 'Description*', 'Account*', 'Skill*', 'Type*', 'Status*', 'Sub Status*', and 'Priority*'. Each field has a corresponding input box or dropdown menu. A 'Save' button is located at the bottom right of the form. A blue arrow points to the 'FOOTER TEST' text below the form.

These fields do not serve any purpose besides being visible labels on the Web Request page. Leaving all these fields blank will default as seen below:

The screenshot shows the Web Request Page form with default values. The page title is 'Web Request Page'. Below the title, there are two links: 'Create a Work Order' and 'Query for Work Order'. The form is titled 'Work Order New' and contains several fields: 'Description*', 'Account*', 'Skill*', 'Type*', 'Status*', 'Sub Status*', and 'Priority*'. Each field has a corresponding input box or dropdown menu. A 'Save' button is located at the bottom right of the form. The footer of the page contains the text 'Version: v5.32.1.2691 Logout'.

The Reports Window

The Reports Window in the *Details* tab determines how queries will run in your Web Request if you choose to utilize this functionality:



The image shows a screenshot of a software interface titled "Reports". It contains two dropdown menus. The first dropdown menu is labeled "Query Results Data Source*" and the second is labeled "Details Report". Both dropdown menus are currently empty, showing only a downward-pointing arrow on the right side of each input field.

The Query Results Data Source

Determines which *View Type* Data Source is used to display query results.

For example, a view data source might have the fields *Work Order Number*, *Work Order Description*, and *Skill Type*. When a user runs a query for Work Orders in the Web Request, those fields will be the only ones they see in the results.

You can simply use the *Default Web Request Query Results View* in the dropdown, or you can create your own with the desired columns (more in the *Optional* section below).

The Details Report

Determines which default Report the Web Request will use if a user selects the *Preview Report* icon after running a Query in Web Request and selecting a specific Work Order.

This field is not required, so you can leave it blank.

Optional – View Type Data Sources

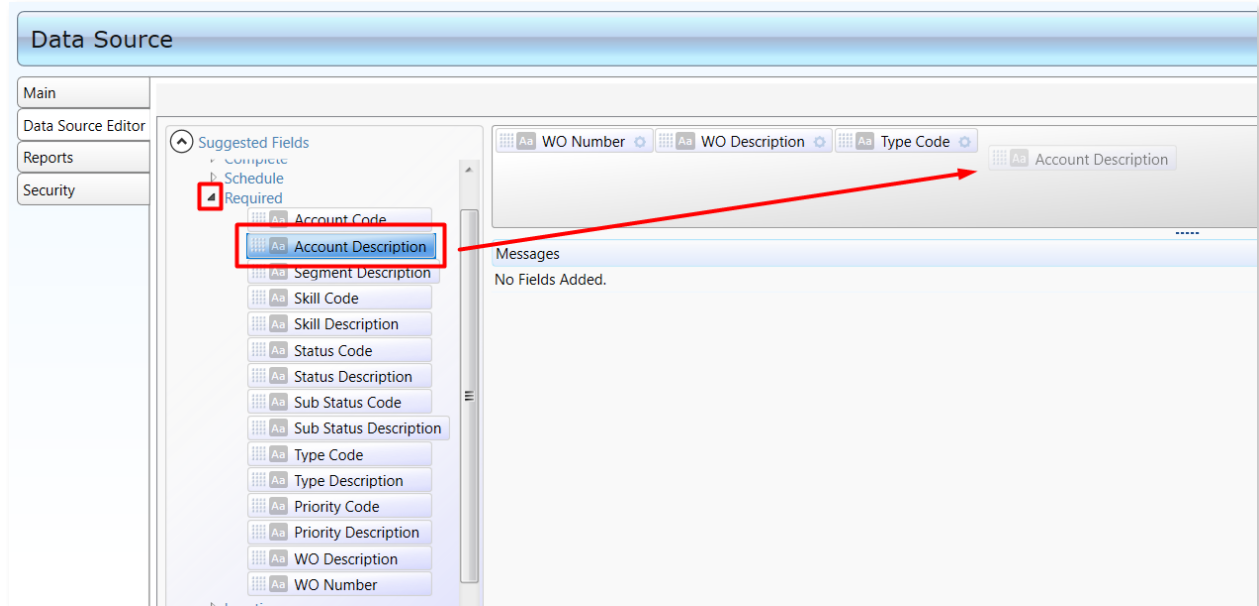
How to Create Your View Type Data Source

- 1: Go to Data Sources > New;
- 2: Select the correct segment;
- 3: Fill in a name and description;
- 4: Set the Type to View;
- 5: Set the Module to *WO - Work Orders* (or *EQ - Assets* if you are setting up your Asset Query in Web Request);
- 6: Click Save.

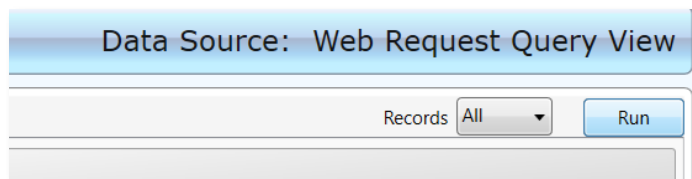
The screenshot displays the 'Data Source' configuration window. On the left is a navigation pane with 'Main', 'Data Source Editor', 'Reports', and 'Security'. The main area is divided into three sections: 'Required', 'Criteria Source', and 'Classification'.
- **Required**: Name* (Web Request Query View), Description* (Web Request Query View), Type* (VIW - View).
- **Criteria Source**: Module* (WO - Work Orders), Saved Query, Query Text.
- **Classification**: Segment (1 - Facilities Segment), Category, Sub Category, Status* (ACTIV - ACTIVE).

How to Edit Your View Type Data Source

- 1: Click the *Data Source Editor* tab;
- 2: Click, drag, and drop the desired fields into the Column Area;



- 3: Select the desired Records Count;
- 4: Hit the Run button;

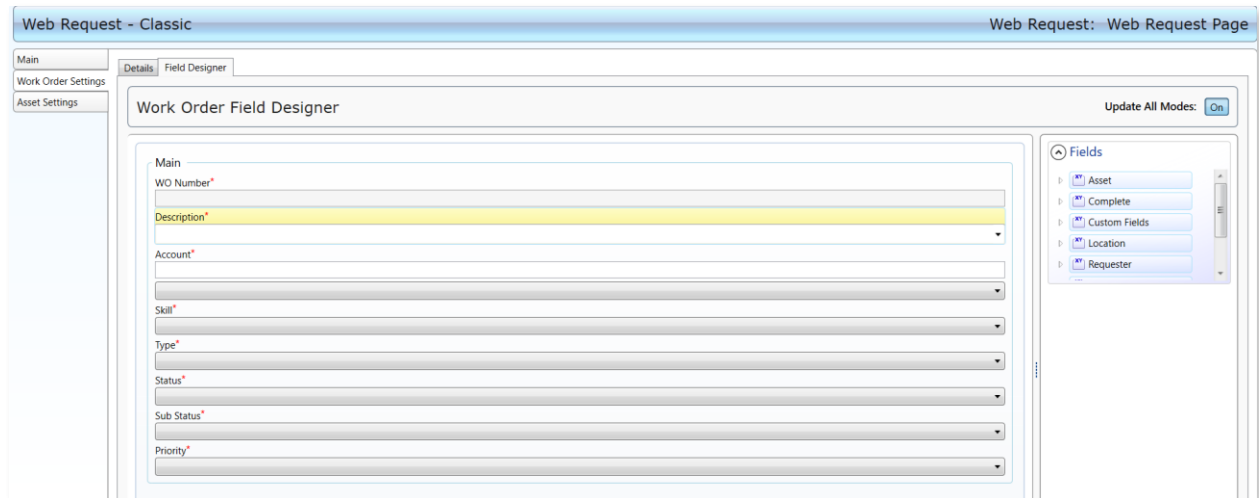


- 5: Click Save.

Your Data Source can now be selected in the Query Results Data Source Drop Down back in your Web Request.

The Field Designer Tab

On this tab, you can build your Web Request Layout. Examples include fields you want users to fill out; which fields will be required; default values for visible and/or hidden fields, and so on.



Update All Modes

It is **very important** to take note of this field before editing Web Request, as it can be set to 3 modes:

On: As seen in the screenshot above: changes you make to the Web Request will be applied to both the *Create* and *Query* versions of your Web Request page.

This version of the form is also used for the confirmation screen.

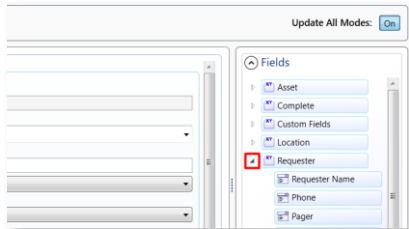
Off – Create: You are editing only what the user sees when they submit a new Web Request.

Off – Query: You are editing the fields that the user sees when running a query in Web Request.

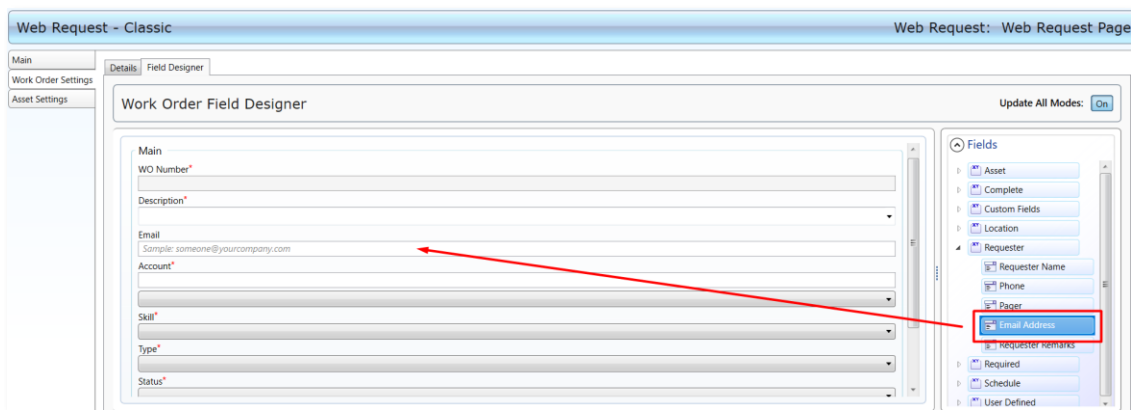
The Fields Window

On the right corner, you will see a series of drop downs in the Fields window.

These are all the available fields that can be used in Web Request. You can click the arrows next to each selection to expand/collapse the available options:



You can click and drag the fields into the main section of the field designer in whichever order you would like:



To remove fields, right-click the undesired field and click *Remove*:

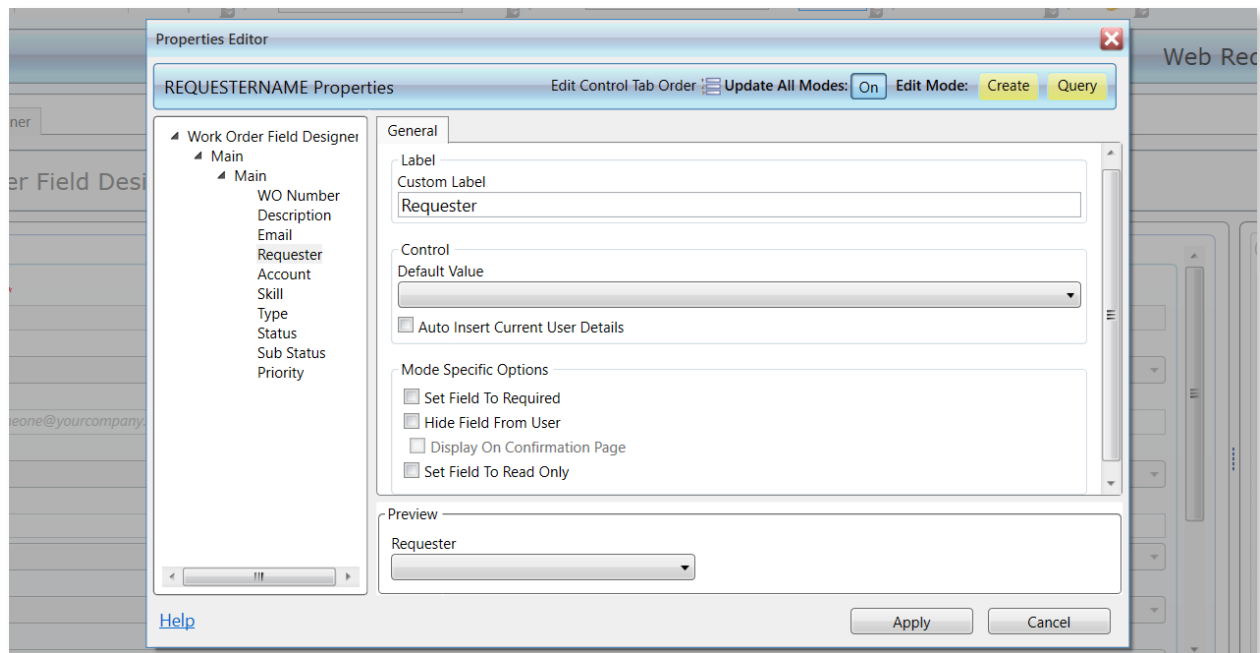
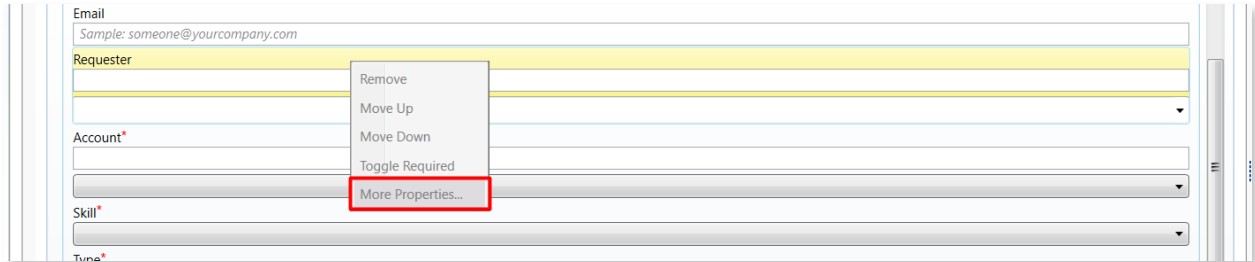


Note: Required fields (marked with a “*”) cannot be removed from Web Request.

Alternatively, you can make required fields hidden as long as you set a default value for them (more details below).

Required, Hidden, and Default Fields

You can right-click and select *More Properties* and choose additional options for each field in Web Request:



As shown in the top right-hand corner of this window, *Update All Modes - Create/Query* applies here as well.

Custom Label: Shows the current label being used for this field. (The *Requester* field will be used as an example).

You can apply a custom label to all fields in Web Request (i.e. changing “Requester” to “Name”). This label will **only** apply to the field in the Web Request.

Default Value: Allows you to select a default value to auto populate a field when the Web Request is opened.

Auto Insert Current User Details: If Active Directory is selected in the Web Request page, Requester information can be populated automatically.

Set Field To Required: If you want end users to always fill out specific fields, you can make any field required.

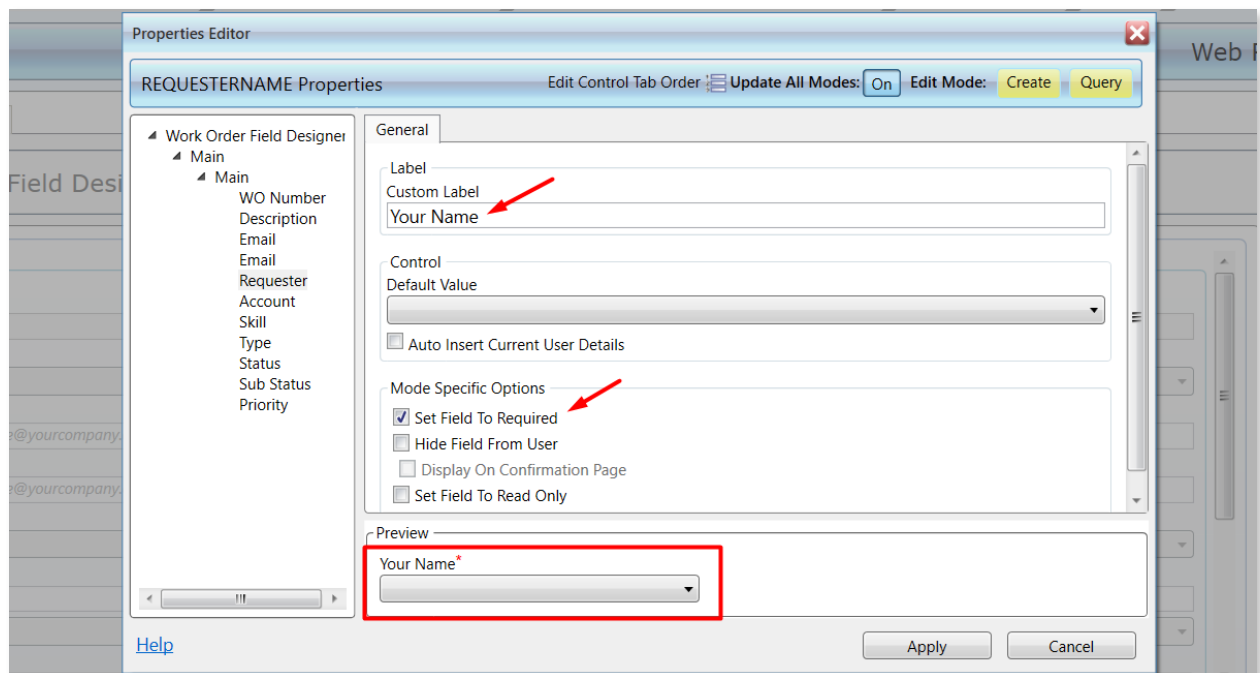
Hide Field From User: Makes the field invisible when viewing the Web Request page. This is useful if you want to set defaults that users shouldn't be able to see/edit.

Example: You want all incoming Work Orders to have a Status of Pending, but you do not want users to change this status or see it.

Set Field to Read Only: This is yet another option for fields in which you have set a default value, and you do not want end users to have the ability to alter it.

Preview: Shows what the field is going to look like in the Web Request page.

As an example, I set the below field to have a Custom Label of "Your Name" and made it required:

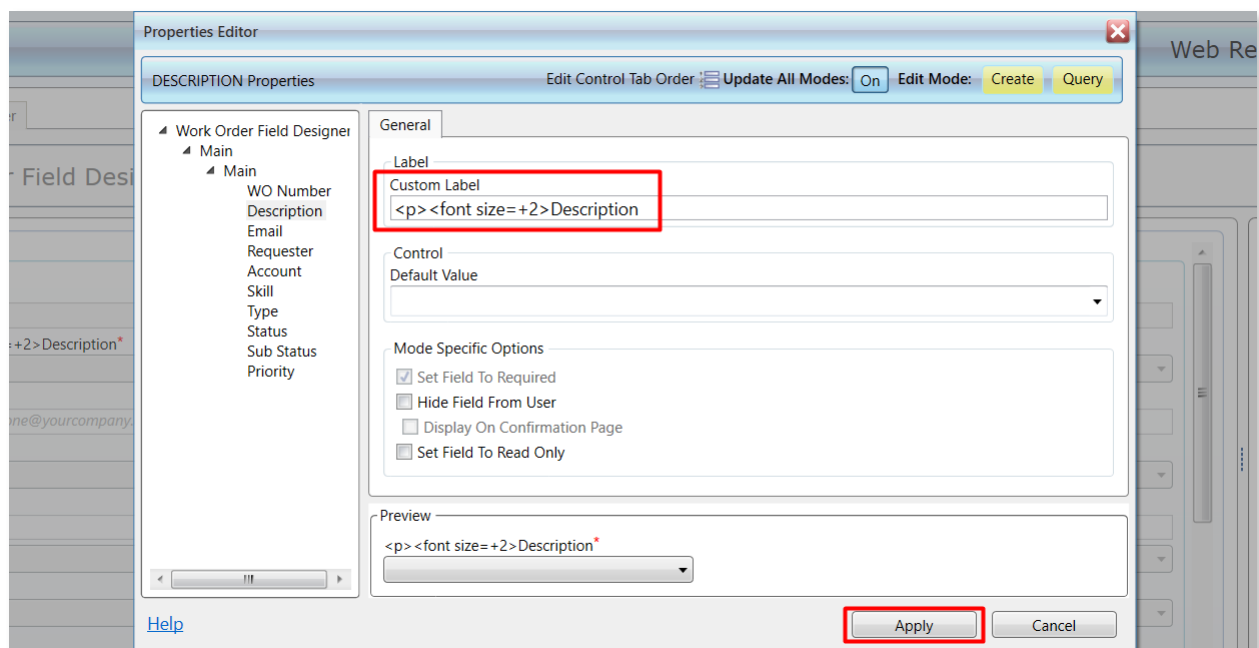


Optional – Advanced Label/Header Editing

How to Increase Label Font Size

In this example, we will use the *Description* field.

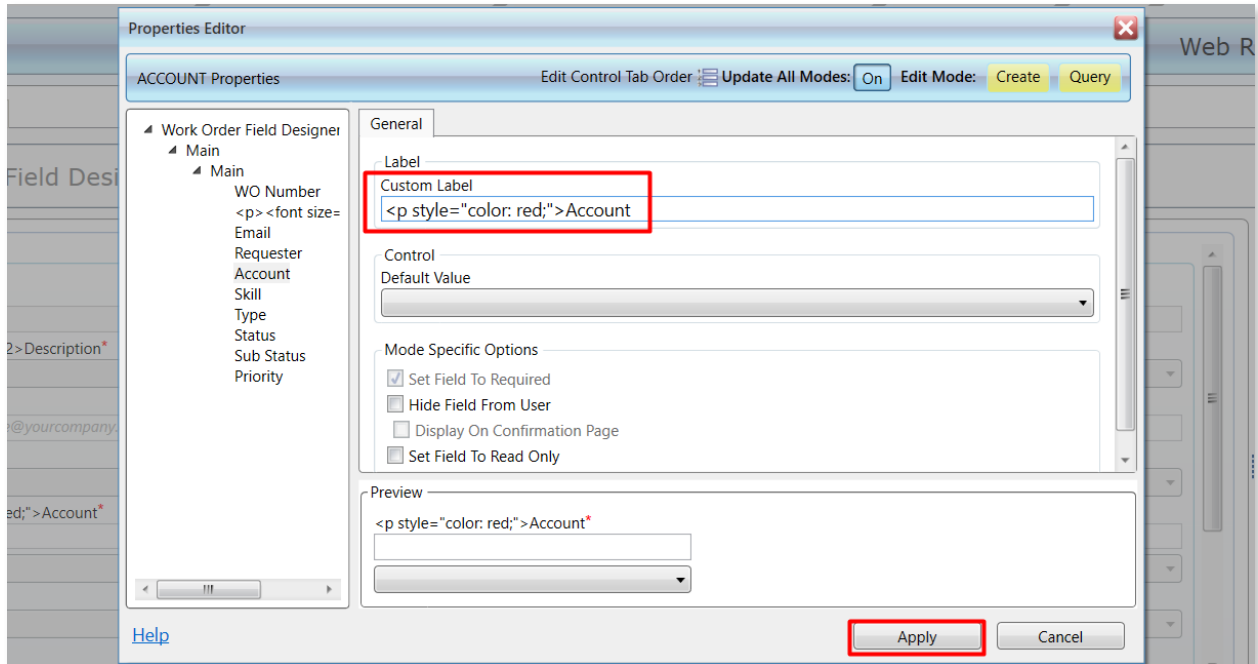
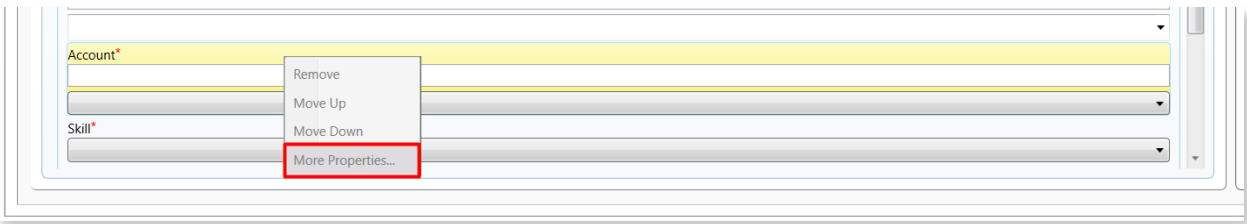
- 1: In the Web Request Field Designer tab, right-click the *Description* field > More Properties;
- 2: Replace the current Label with the following: `<p>Description`
- 3: Click Apply;
- 4: Save the Web Request page:



How to Change Label Font Color

In this example, we will use the *Account* field.

- 1: In the Web Request Field Designer tab, right-click the *Account* field > More Properties;
- 2: Replace the current Label with the following: `<p style="color: red;">Account`
- 3: Click Apply;
- 4: Save the Web Request page:



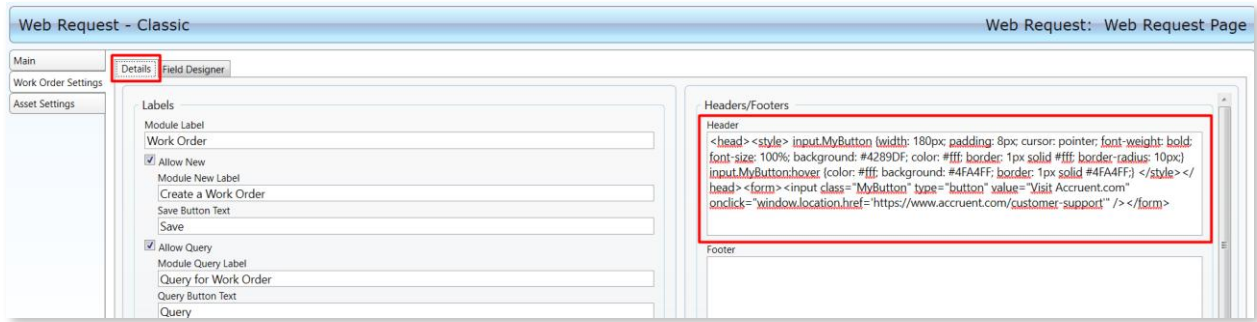
How to Add a Button to the Header/Footer

In this example, we will add a button that takes you to the Accruent.com page in the Web Request header.

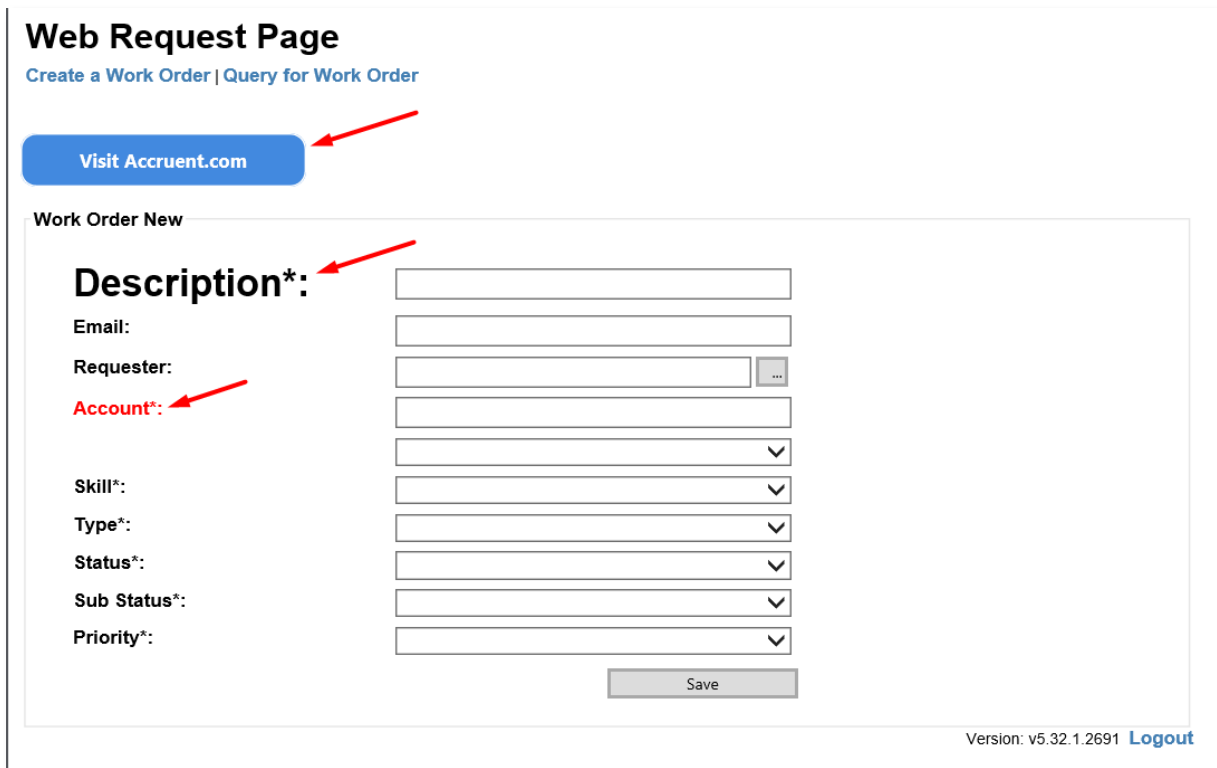
- 1: In the Web Request page, click the *Details* tab;
- 2: Copy/Paste the below HTML/CSS into the Header text area;

```
<head><style> input.MyButton {width: 180px; padding: 8px; cursor: pointer; font-weight: bold; font-size: 100%; background: #4289DF; color: #fff; border: 1px solid #fff; border-radius: 10px;} input.MyButton:hover {color: #fff; background: #4FA4FF; border: 1px solid #4FA4FF;} </style></head><form><input class="MyButton" type="button" value="Visit Accruent.com" onclick="window.location.href='https://www.accruent.com/customer-support'" /></form>
```

NOTE: The button text is in red / the hyperlink is in blue. Feel free to modify them.



The screenshot below shows the results of the 3 aforementioned steps:



Info / Contact Support

WEB REQUEST - How to Create/Edit/Use Web Request Pages

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Chat: <https://www.accruent.com/customer-support>