



INTRODUCTION TO TMS

Common Questions for New TMS Users

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Introduction

The intent of this document is to provide a brief overview of the most used modules and their uses within TMS.

This is not a replacement for formal training, but rather a quick cheat sheet to help navigate the system for new users.

More detailed guides for frequently used modules are available by request through our support team.

We recommend asking about training from our Professional Services department.

Work Orders

New

Allows you to create a new Work Order for TMS. Any fields on this page marked with a "*" are required. So, in order to submit a basic work order, you can fill out these fields and click the save icon in the top left to create the work order.

Edit

This works much like a direct query. If you know the exact Work Order Number you are looking for, you can enter it here to pull it up.

Query

If you need to pull up a list of work orders that share certain criteria, you'll want to run a work order query.

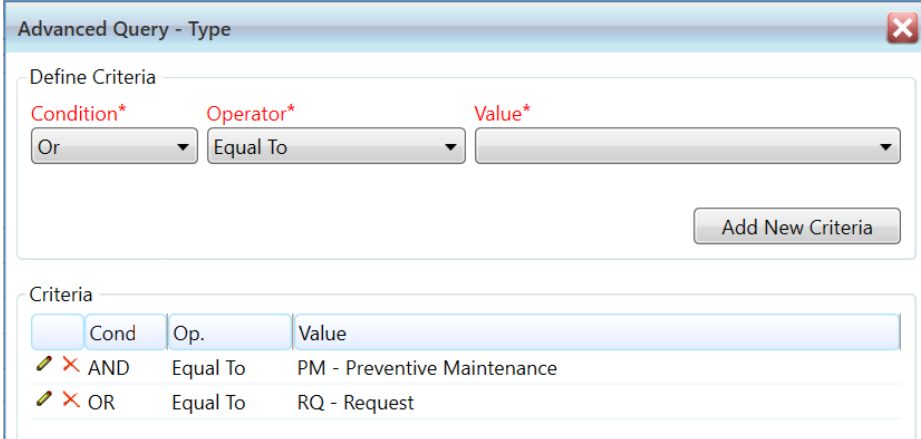
Example: You want to see all Active work orders? Work Order > Query > Set the Status field to "Active" then click the blue lightning bolt on the tool bar to run the query. You'll then see a list of all Active work orders within TMS. Any module in TMS with a query function can use Advanced and Wild Card queries as well.

Advanced Query

Any field in TMS with this icon  can run an advanced query.

An advanced query is used when you need multiple pieces of data in the same field.

Example: I want to see all PM and RQ Type work orders. I can select both in the advanced query window.



Cond	Op.	Value
AND	Equal To	PM - Preventive Maintenance
OR	Equal To	RQ - Request

Wildcard Query

You can use * in any free text field to perform wildcard queries. Using * at the end of a word you search for will query for anything that contains what you've typed in.

Example: I need all work orders with the word "extinguisher" in the Work Order Description. I can type *extinguisher* or even *exting* and any work order description containing those letters will be queried for.



WO Number
Sample: 12

Description
extinguisher

Assets

New, Edit, and Query operate the exact same way here as they do for work orders. You'll find many modules within TMS have a New, Edit, and Query option from the drop down.

Schedules

Schedules are used to create work orders using the same criteria each time one is generated. There are 3 types of Schedules.

Schedules can be set up to automatically generate work orders, or you can manually generate work orders from schedules. More information is available in our Professional Services training, or documentation from our support team.

PM Schedule: Preventative Maintenance

PE Schedules: Planned Event

IN Schedules: Inspection Schedules

Each of these Schedule types have their own New, Edit, and Query options.

Modules

The modules drop down covers a multitude of important TMS functions. We'll cover a few here.

Resources

Resources are Assignments for Work Orders in TMS.

Just because someone has a username and password for TMS does not mean they can be assigned work orders.

Creating a resource is how you'll add new names to the assignment drop down for work orders needing to be assigned.

Web Request

Web Request pages can be created so work orders can be submitted to TMS from external web pages.

You can customize the Web Request page from within TMS, then provide the URL to employees so they can submit work orders by simply filling in the required fields and clicking "Submit."

Dashboard

Dashboards can be created and customized to show a multitude of information within TMS. You can view the different Dashboards available to you under Modules> Dashboard> Then selecting a dashboard from the "Form" dropdown on the tool bar.

Data Sources

Data Sources are used to create Standard reports in TMS. They function similarly to queries; in that you can pull information into them to create lists you can then export from TMS.

The difference is Data Sources can pull information from multiple modules. For instance, a work order query only can view fields from the work order module, but a data source can show a list of work order data and then join with asset or schedule data relevant to that list of work orders.

You can also write custom SQL in data sources, create graphs for dashboards, create results views for query results, or simply list a specific set of data you want in a report.

Reports

Reports, like Data Sources, can display information spanning multiple modules and typically serve a specific purpose. Wildcard Queries can be very useful when looking for a specific report.

TMS comes with several pre-built reports that cover a wide span of information.

Example: Say you want to know if there is a report that tracks the hours of different assignments. You can navigate to Reports > Query > And type *hour* into the description or name field.

Another useful tip is to blank out the segment field. Reports are stored in specific segments, so if you want to search system-wide for a specific report, select the Segment drop down and select the blank option.

Custom reports can be built, or existing reports can be customized by our Professional Services department as a billable service.

Tools

Change Password

Here you can change your own password for TMS.

User Preferences

This window allows you to select what you first see when opening TMS by selecting your Startup Module.

There is a way to select your startup module under the options as well, but that would change the module for your entire user group, selecting a module here will only alter your user account.

Setup

Security

Under the Security drop down you can add new users to TMS as well as alter their permissions to what they can and can't access. We'll cover the most used functions here.

- Adding new users: Under Setup > Security > Users/Groups > You can add new users to log into TMS.
Using the blank paper icon under the Users section, you can fill out the required fields, select the most relevant User Group for that user, and then save.
- Changing user passwords: Let's say someone you work with has forgotten their password and is unable to access TMS. If you have permission to do so, you can scroll down to their username, click the pencil icon next to their name, and manually type in a new password for their user account.

Permissions

- Setup > Security > Permissions determines what you can view and alter in TMS. Permissions are broken down by each module. So, you can see by clicking the arrow next to Work Orders, whether or now you have Read Only, Full Access, or No Access to each Work Order option.

The screenshot shows two main sections: 'Selection' and 'Permissions'.

Selection:

- Group***: A dropdown menu with 'BIO - Biomed Users' selected.
- Segment***: A dropdown menu with '2 - Biomed Segment' selected.

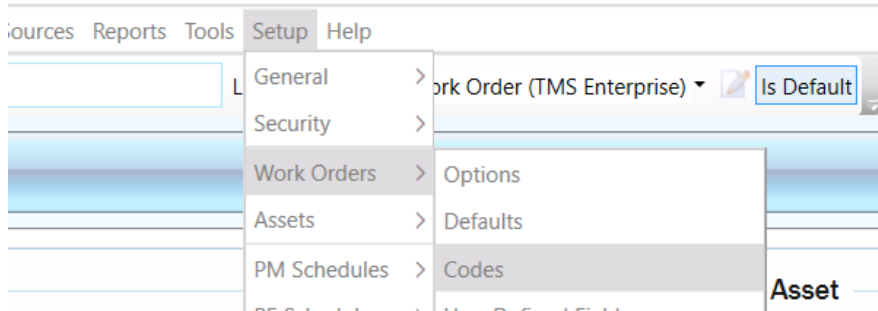
Permissions:

- Root (Mixed)
 - Work Orders (Mixed)
 - New (Full)
 - Edit (Full)
 - Query (Full)
 - Quick Close (No Access)
 - WO Dispatch (Read Only)
 - Assets (Full)
 - Schedules (Full)
 - Materials (Full)
 - Purchasing (Full)
 - Modules (Mixed)
 - Data Sources (Full)
 - Reports (Full)
 - Tools (Full)
 - Setup (Full)

Codes

A question often asked about TMS is "How do I add something to a dropdown?"

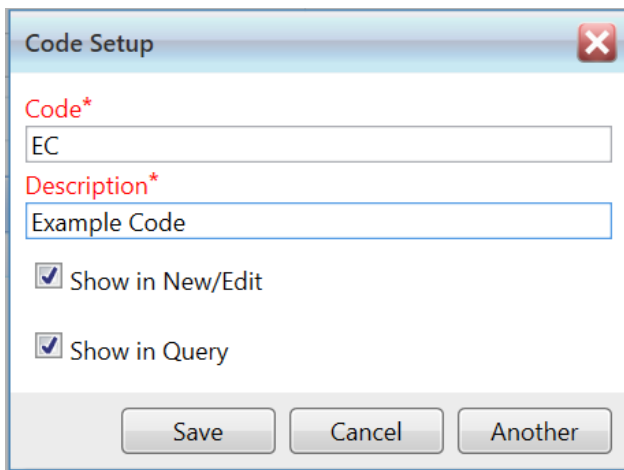
For instance, let's say on an asset you try to select a location, but you don't see the location you know this asset belongs to. You may need to add a new code.



The Setup dropdown leads to all the codes you'd need to add to. Setup > Work Orders > Codes, Setup > Assets > Codes, etc. etc.

Then you select the field you need to add to from the Code List dropdown and use the blank paper icon to create a new code.

The description of the code is what will display in the drop down, so you can use an abbreviation or a number for the Code field.

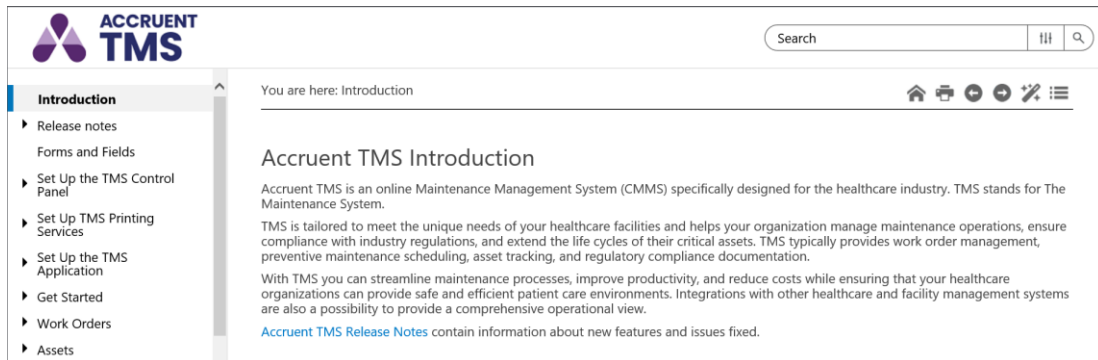


Help

Help Center

The help center is an incredibly useful tool for new users of TMS. You can search through the help center for directions on how to do pretty much anything within the application.

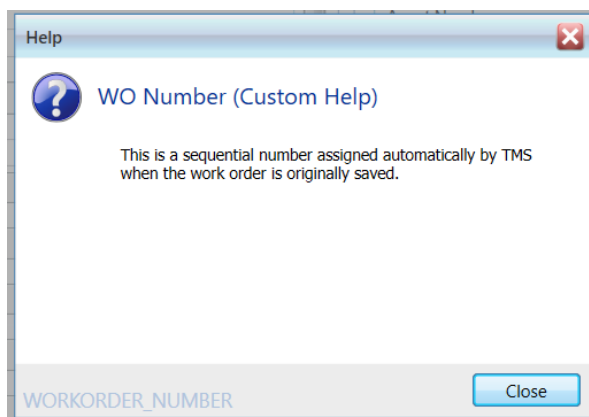
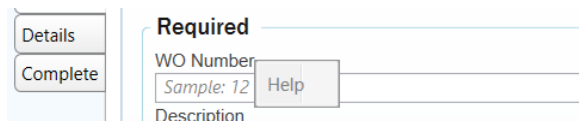
On the left you'll see many options to choose from, but you can also type in key words to search for specific articles if you don't see what you're looking for.



Right-Click Help

Most fields in TMS, in any module on any form, you can right-click and select "Help" and a brief description of that field will appear.

If you're not quite sure what field should be used for this



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Accruent, LLC
Domain 3, 11501 Domain Drive Suite 160,
Austin, TX 78758

Contact Accruent Support

Phone: (877) 345 3999 ext 1 (7a-7p M-F CST)

Email: TmsSupport@accruent.com

Community Portal: <http://accruent-support.force.com/healthcare>

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