# TMS PM GENERATION FAQ

## Common Questions and Scenarios regarding PM Generation

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# Introduction

This document aims to answer common inquiries with handling Preventive Maintenance (PM) Generation, including searching for PM work orders (WOs), batch-printing PM WOs for the month, and troubleshooting PM Generation and automatic printing.

It covers material for TMS OnSite (on-premise version) and TMS OnLine (cloud-based version), and is meant for administrators, supervisors/managers, and technicians with appropriate application permissions.

Some links in this document navigate to Knowledge Base Articles in the TMS Support Portal, only viewable with an account.

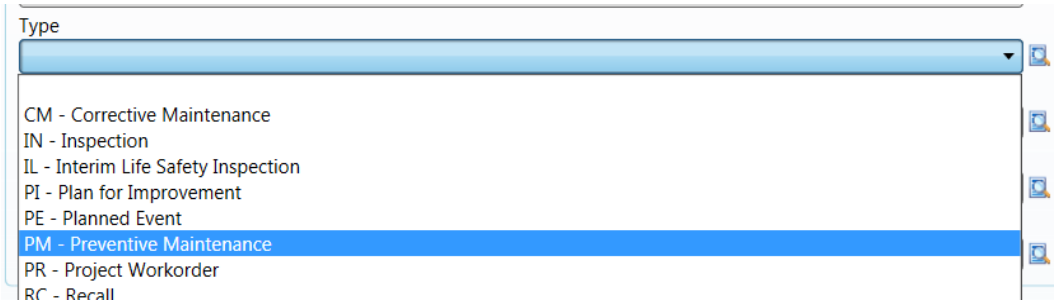
Register at accruent-support.force.com/healthcare if necessary.

# Printing Work Orders by time range

There are numbers of ways to display/manage an immediate list of generated WOs, but the most straightforward way is via Work Order > Query.

1. Navigate to **Work Order > Query.**

2. Set the Type drop down to **PM - Preventive Maintenance** (use the **Advanced Query** button to also set to **PE – Planned Event** and **IN - Inspection** as well, if needed).



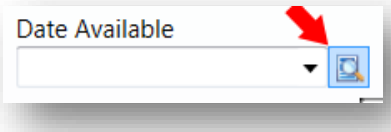

3. In the **Date Available** field, use the **Advanced Query button** ( ) to set the range of dates (example, for the month of May 2017, enter 2 criteria: **greater than or equal to 5/1/2017**, then **AND less than or equal**

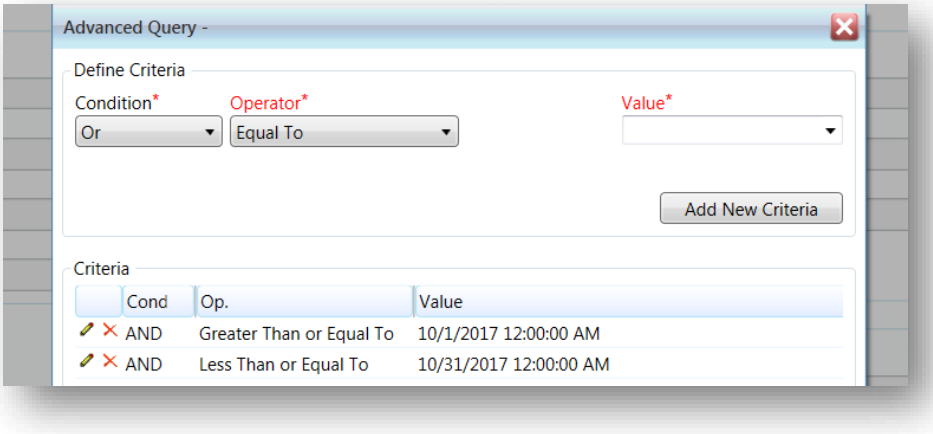
**to 5/31/2017.** Note the importance of the 2nd AND condition; if kept at OR, virtually every day in existence is being accounted for).

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.

a. There are shortcut Operators that can be used in place of the 2 criteria sets. You may find 'This Month' or 'This Week' helpful for monthly or weekly PM generation respectively (e.g. 'This Month' for all dates within the current month).

b. **Date Available** on Work Orders usually matches the Next Due Date on PM Schedules when the Schedule generated the work order.




4. Select **OK**, then the **Execute** ( ) button in the toolbar. A list of all PM WOs generated for the date range specified will be present. If desired, head straight to the Print icon to batch print all resulting WOs page by page **(batch printing is limited to 1000 WOs).**

**TIP**: It is possible to save queries to avoid the hassle of steps 2 and 3. Before hitting the **Execute** Button, hit the **Save** icon and give the query a name. It is then accessible by selecting the **Open Query** ( ) button when querying in the future.

# PMs did not generate

Among a list of possible causes, the most common cause of this scenario is that the TMS Control Panel Service (a Windows service on the application server responsible for scheduled backend functions) may have stopped or needs to restart.

Best practices for troubleshooting this situation include verifying that PM work orders are not already in the system, checking the Run Date/Time of automatic schedule generation, and checking if any PM Schedules are set in the date range in question.

> NOTE: Restarting the TMS Control Panel Service requires access to the application server. For TMS OnLine users, that means a call to TMS Tech Support; for TMS OnSite users, that means a call to the local system administrator or IT department. However, the following can be done in the application interface and should be performed before considering the TMS Control Panel.

1. Verify that PM work orders did not actually generate. Search for PM WOs using the steps in the above section.

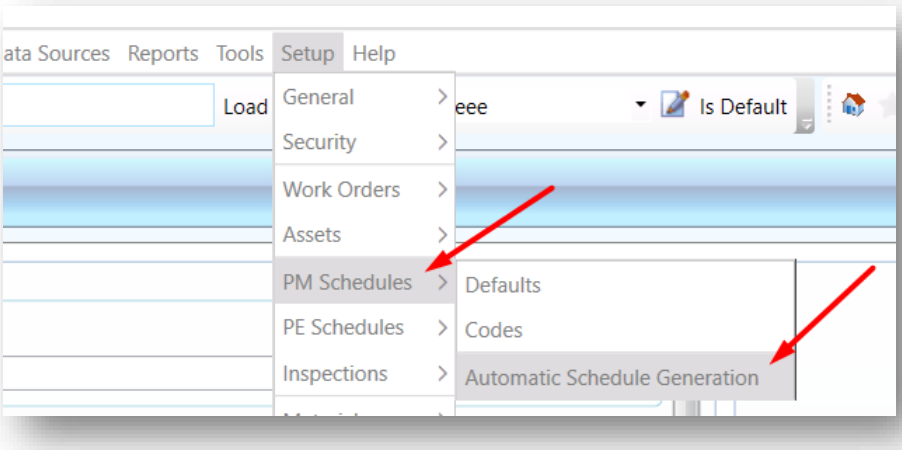
2. If no PM work orders were found, do a Schedule Query to see if there were any PMs due for the date range in question. Navigate to **Schedules > PM Query (**or PE/Inspection Query if needed) and search using the Advanced Query button next to the **Next Due Date** field to search by the range (this procedure is the same as the Date Available example in the above section).

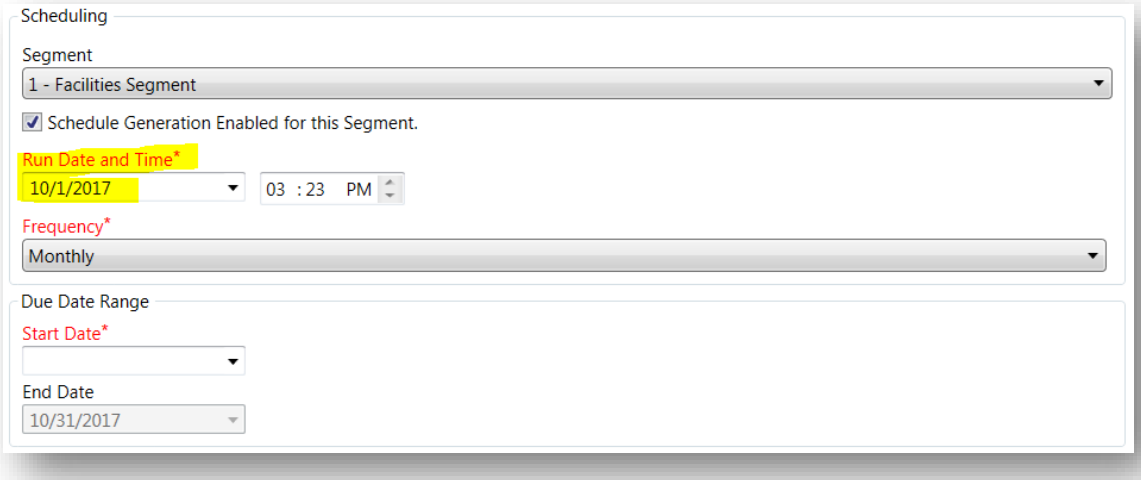
    a. If no PMs result from the query, it is likely that either there were no PMs initially due, or PM Generation already took place and updated the Next Due Dates of the PMs (both are good signs).

    b. If PMs result from the query, with Next Due Dates within the specified range, they did not generate. Move forward with step 3.

3. Check the Run Date/Time under **Setup > PM Schedules > Automatic Schedule Generation**. Is the **Run Date/Time** set with a current/future date, or a past date?

**NOTE**: It is expected to be set to a current/future date. If set to a past date, it explains why there are active PMs with dates still within range, and ultimately why PMs did not generate. It is likely that services are/were hung and need to be restarted on the application server.



# Some PMs generated, others did not.

It is possible and common for only a portion of PMs (or PEs/Inspections) to generate successfully. Common causes include:

1. PMs being marked as Variable Schedule (further WO generation will not occur until the latest WO of the PM is completed)

2. Tied Assets being inactive/retired

3. Assigned resources/technicians having a status of Inactive (starting with version 2017.5.10.5, TMS addresses and corrects this fault by ignoring if the Resource is Inactive)

4. PM Schedules containing missing required default values (usually as a result of a data import)

In manual generation, this is indicated with an error count of 1 or greater when the process is complete.

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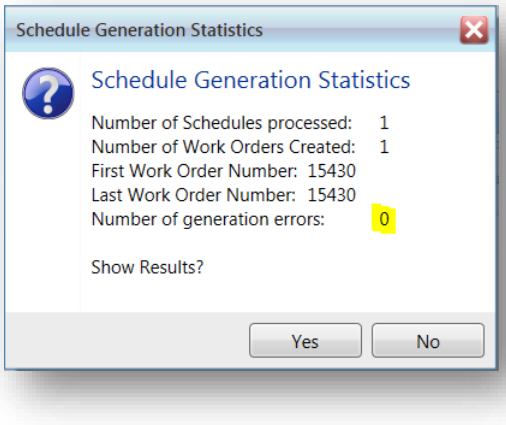



Referring to the PM Generation log is the best recommendation. Navigate to **Setup > PM > Automatic Generation**, and select the **Schedules Schedule** green notepad icon ( ) in the toolbar. Look for problem entries (usually indicated with longer string) showing why particular PMs did not generate a work order.

1. Entries stating that schedules were skipped due to pending work order completion indicates that the affected PMs are of a Variable Schedule type. WOs in question will still need work done and marked as complete.

2. If an entry states that an inactive resource is tied to the PM, either the Resource will need to be removed, changed to an Active status, or replaced with an active Resource (as previously noted, this scenario should not occur starting in version 2017.5.10.5).

3. If an entry states that an inactive Asset is tied to the PM, one will either need to reset the Asset status to Active or deactivate the PM from future automatic generation by setting the **PM Type code** to **Unscheduled**.

**NOTE**: TMS attempts to avoid this scenario entirely with a feature in which setting the Asset to Retired/Inactive would automatically unschedule tied PM schedules. However, this situation can come about if PMs are tampered with afterwards, or as a result of improper clean-up from a data import.

1. All other log entries will attempt to explain the issue as clear as possible. If additional assistance is needed, contact tech support.

# PMs Generated, but did not print

There are several possible reasons, but the most effective troubleshooting approach is to verify that the TMS Print Service is running (or needs to restart) and ensure that error messages are not occurring in the Autoprint log.

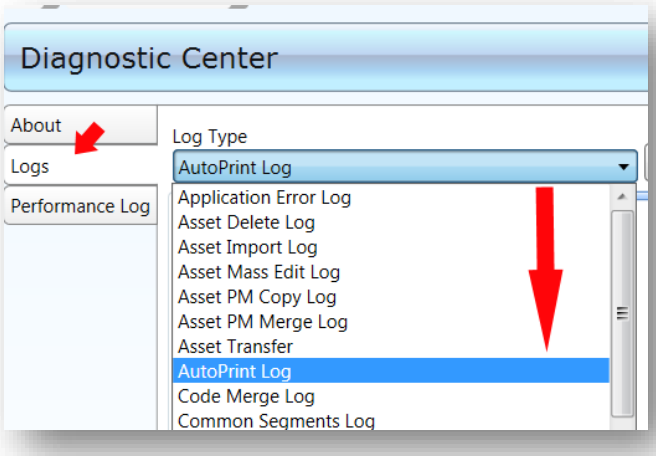
**NOTES:**

The following is assuming TMS Print Services has already been setup and is in normal use. Otherwise, please refer to the installation and configuration of TMS Print Services document.

TMS Print Services is installed and managed on the client's network infrastructure, regardless of whether the version of TMS used is OnSite (on-premise) or OnLine (Accruent hosted); Tech Support will typically not know

where the client installs and manages the service, as this is determined by your organization and not Accruent.

1 Refer to the Autoprint Log in **Tools > Diagnostic Center > Logs Tab**. This same log can be accessed via the green notepad icon ( ) when viewing Autoprint Profiles in **Setup > Work Orders > Autoprint Setup.**



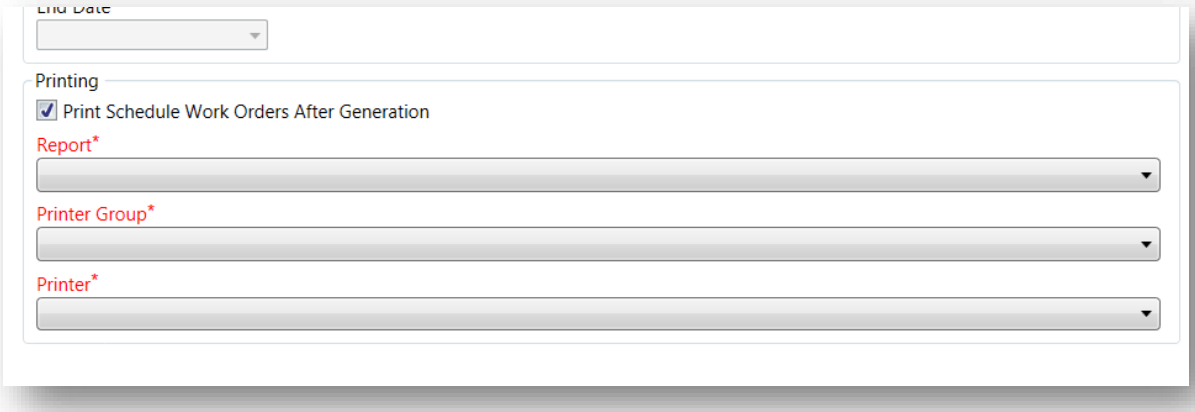

2 Note the latest log entry. If it is relatively old, compared to the frequency of preceding log entries (e.g. the last entry being 3 hours ago with preceding entries being minutes apart), it is likely that services have stopped at one point and need to restart.

3 If entries are current (e.g. last entry being within 10-15 minutes), check for error messages in the log. The most common is the "Settings to access printer '[printer name]' are not valid" error message, usually caused by the removal or modification of the printer on the computer/server hosting TMS Print Services.

4 It is possible that auto-printing may not even be configured. Check if **Autoprint Profiles** are in use, or if the **Print Schedule Work Orders After Generation** option is enabled (only one of these two methods are recommended for use).

   a. Autoprint profiles, configured at **Setup > Work Orders > Autoprint Profiles**, can be set up to auto print any work order, not just PMs. Verify if any profile is set to capture PM work orders, and if they are enabled.

b. Alternatively, check if the **Print Schedule Work Orders After Generation** option in **Setup > PM Schedules > Automatic Schedule Generation** is enabled (toward the bottom of the page). The appropriate Report Template, Printer Group and Printer will need to be selected if this method is used.



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