



STANDARD REPORTS

How to Create Standard Reports in TMS

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Introduction

Purpose

This document is designed to serve as a template for users to create and develop standard reports within the TMS application, including a basic understanding of form fields, report layout manipulation, and best practices.

Scope

This document is intended as an informational tool regarding *Standard* and *Template* Reports, including a walkthrough of the respective functionality of the Report Definitions module.

It will not cover an in-depth explanation of Data Sources or Designer Reports.

Reports

Report Types

A key component of TMS is the ability to view your data and create reports based upon your data.

The reporting capabilities of TMS consist of two parts: *Data Sources* and *Report Definitions*.

- **Data Source:** A Data Source contains information for retrieving a subset of data from any database. This general structure includes the user selected data fields, aggregated data, source tables, relationships, and filters and sort criteria.
- **Report Definition:** A Report Definition contains information on the layout of a particular Data Source. These records will simply be referred to as **Reports**.

There are three types of report definitions: **Designer**, **Standard**, and **Template**.

Standard and Designer Reports

Standard and Designer Reports include a reference to a specific Data Source and can contain field grouping instructions, categorization fields, and security information.

This includes data fields, aggregated data, source tables, relationships, and filters and sort criteria.

Template Reports

A Template Report contains general items related to a report layout, but it is not linked to a Data Source and does not contain data fields.

These are used when printing *on-the-fly* data such as those found in query results.

They can also be used as a basis for creating future reports from Data Sources.

How to Create a New Standard Report

Standard Reports are tied to a specific Data Source. They allow you to format how the data fields pulled in from the Data Source are displayed when the Report is generated.

To create a new Standard Report, follow these steps:

1: Go to **Reports > New**.

2: In the Segment dropdown menu, select the segment in which this Report should reside.

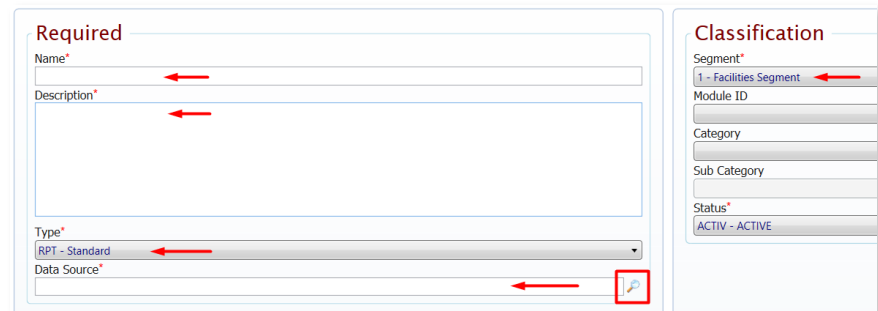
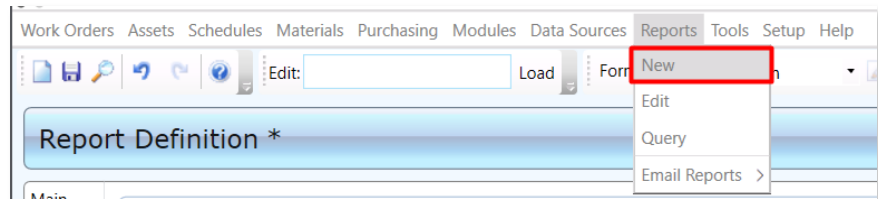
3: Enter a *Name* for the Report.

4: Enter a *Description* for the Report.

5: In the *Type* dropdown menu, select *Standard*.

6: In the *Data Source* field, you can either enter a valid Data Source name or click the *Lookup* button and perform a query for the correct Data Source.

7: Hit **Save**.



Note: Module ID, Category, and Sub-Category are fields that can be used to better categorize the Reports and help in Report queries, but they have no direct impact on the Report output.

The *Status* field should be kept as *ACTIVE*.

Classification

Segment*
1 - Facilities Segment

Module ID

Category

Sub Category

Status*
ACTIV - ACTIVE

How to Edit Standard Report

Upon saving a new Report, the *Report Edit* screen appears.

Additional tabs become available when the new Report is opened in *Edit* mode:

- **Report Layout**
- **Security**

Report Definition

Main
Report Layout
Security

Required

Name*
New Report

Description*

If you are already on a Report module screen, you can access the *Report Edit* screen from the *menu bar* and the *toolbar*:

• Menu Bar

- 1: Go to **Reports > Edit**.
- 2: Enter the Report Name and click **Ok**.

Report Definition Name*
Report Name

Open Using Form
Report Definition

Set as Default Form for this Module.

OK Cancel

• Toolbar

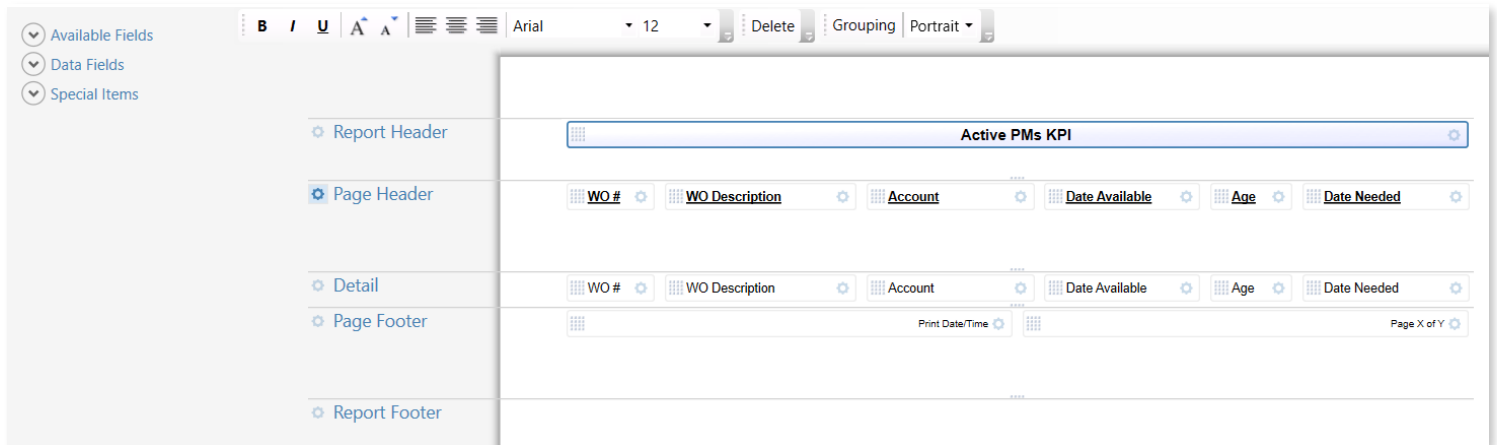
- 1: Enter the Name of the Report in the *Edit* field in the toolbar.
- 2: Click **Load**.

g Modules Data Sources Reports Tools Setup Help

Edit: Report Name Load Form: Report Definition

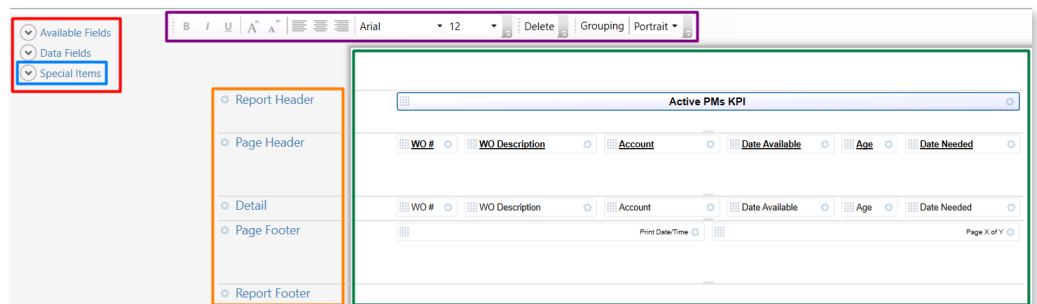
The Report Layout Editor Tab

Upon clicking the *Report Layout* tab, the below window appears:



The elements on the screen can be categorized as:

- **Elements Pane**
- **Special Items**
- **Formatting Toolbar**
- **Section Arrangement Settings**
- **Page Layout Pane**



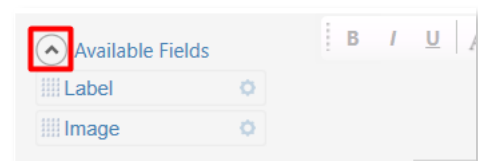
Report Layout Components

Elements Pane

This area contains three element lists from which you can select items to add to your Report.

- **Available Fields:** Contains a *Label* field and an *Image* field

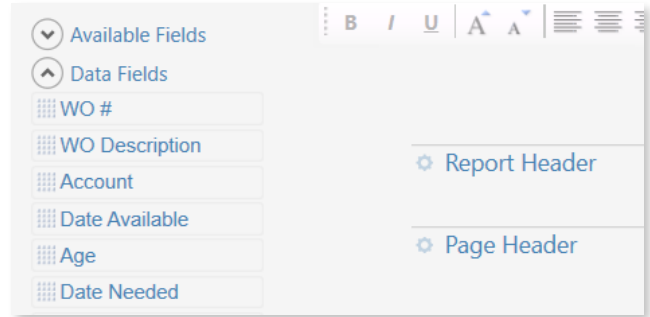
- **Label:** Used to insert a label to the Report.
- **Image:** Used to insert an image to the Report.



- **Data Fields:** Contains the fields in the Data Source linked to the Report.

In this example, the available data fields are:

- WO Number;
- WO Description;
- Account Description;
- Date Available;
- Age (*DATEDIFF* function);
- Date Needed.



Note: If this is a Template-type Report, there will be no linked Data Source, so the list will be blank.

IMPORTANT: If you create a Report for a Data Source, and then go back and edit said Data Source, the Report page layout will NOT automatically update with the changes made to the Data Source.

Special Items

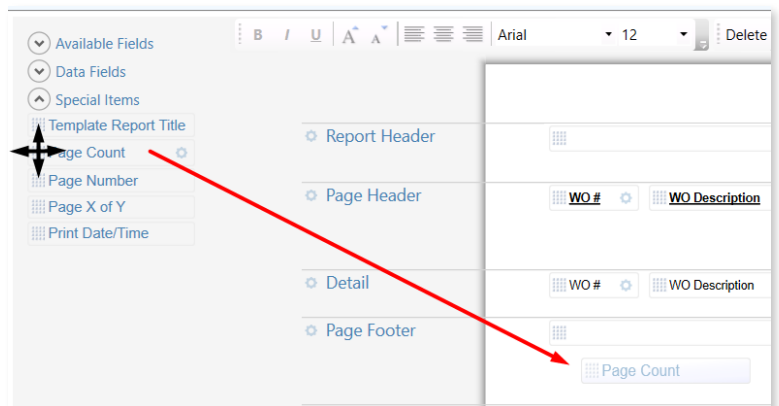
These are non-data elements that can be added to the Report.

The available items are:

- Template Report Title;
- Page Count;
- Page Number;
- Page X of Y;
- Print Date/Time.

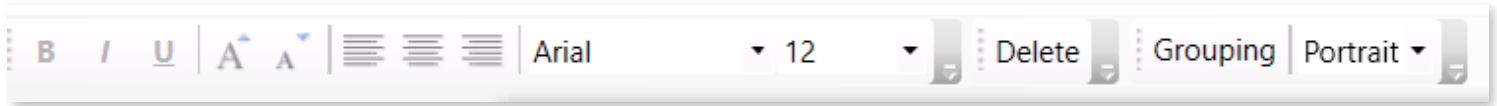


To add items from the **Elements Pane** into the **Page Layout Pane**, simply hover the mouse cursor over the desired field until the cursor turns into an anchor, then drag-and-drop the item into the desired section.



Formatting Toolbar

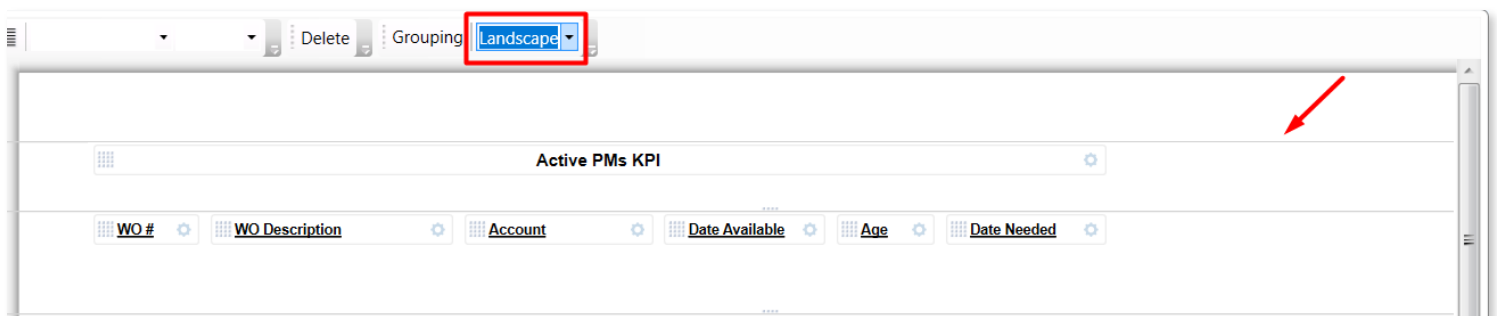
The Formatting Toolbar allows you to format selected items in the Page Layout area, as well as set general options for the Report, like the page orientation.



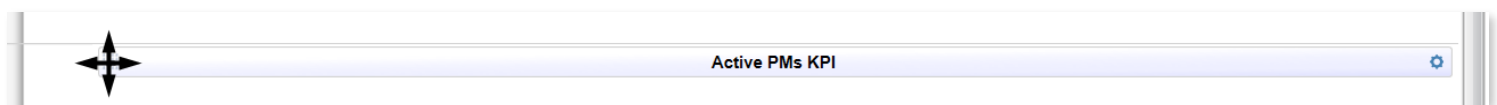
From left to right, the buttons are:

- **Bold / Italic / Underline:** These buttons format the selected text style.
- **Grow Font / Shrink Font:** Click one or the other to increase/decrease the selected text font size.
- **Left Align / Center / Right Align:** These buttons change the selected text alignment.
- **Font / Font Size:** Use these drop-down menus to select the text's font type and font point size.
- **Delete:** This button deletes the selected element.
- **Grouping:** Not available for Template Reports. This allows you to break the Report data into data field criteria. More details in the [Group and Sort](#) section.
- **Page Orientation:** Use this drop-down menu to set the page orientation to Portrait or Landscape.

Note: If you change the *Page Orientation* from **Portrait** to **Landscape** (or vice versa), the fields will not automatically resize to adjust to the new page width.



To resolve this, drag the mouse cursor over the left corner of the field until the cursor becomes an anchor, then click on the field and it will resize according to the page width.

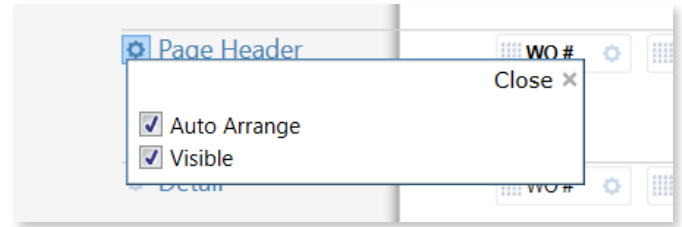


Section Arrangement Settings

Allows you to change the way fields are arranged in each header, detail, and footer section.

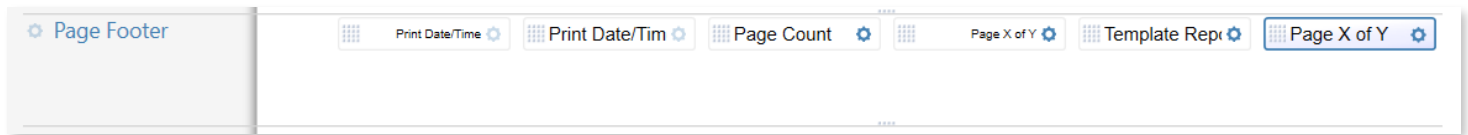
Click the *gear icon* next to any header, field, or footer section.

*The Arrangement window appears



• **Auto Arrange:** This checkbox enables/disables the free positioning of fields in the section:

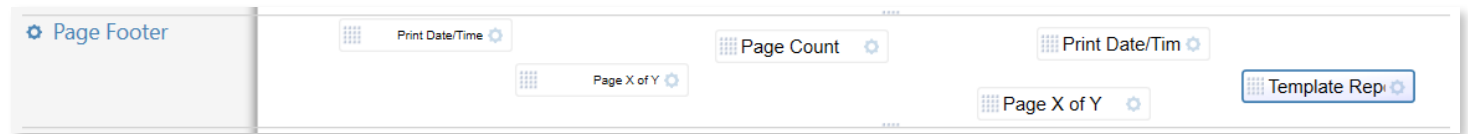
Auto Arrange: Every time a new field is added, its width is determined by the page width divided by the number of fields present in the section.



Note: If a field width is manually modified, it will no longer be subject to the resizing calculation, meaning its width will remain the same regardless of how many fields are added to the section.

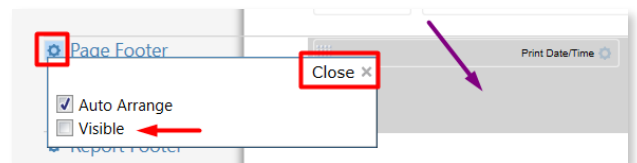


Auto Arrange: You can place fields anywhere freely.



• **Visible:** If unchecked, this makes any header, field, or footer section hidden.

If a section is hidden, it will appear **grayed out** in the Page Layout Pane.



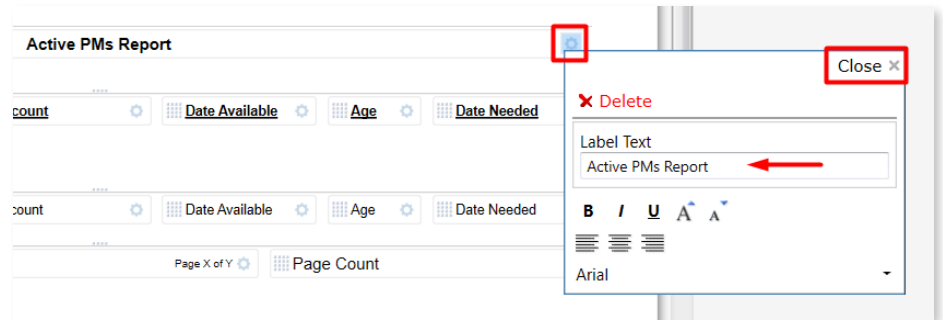
Page Layout Pane

This area shows an exact layout of how the report will look when generated. You can rearrange and resize data fields, label fields, and columns here.

• Renaming Label Fields:

Click the *gear* icon on any label field, rename it as you please, then click *Close*.

Text/font and alignment options are available below the *Label Text* field.

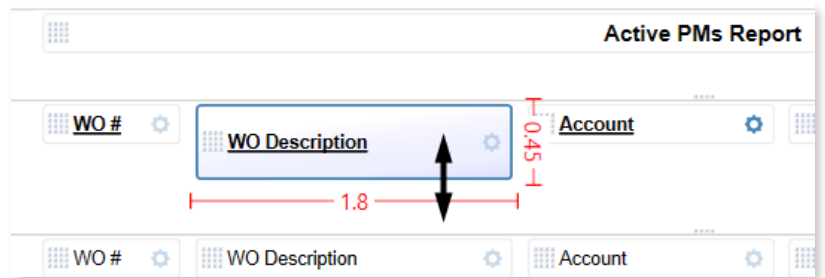


• Resizing Label/Data Fields:

Hover the mouse cursor over either the vertical or the horizontal border line of any label/data field.

- *The cursor turns into two directional arrows
- *Red measuring elements appear

Resize the label/data field as you please.



Note: Label/Data Field resizes are strictly mouse-controlled actions. There is no current option to enter or automate a particular field size (vertical or lateral).

Note: Resizing a column label field does not automatically resize its data field counterpart

As an example, resizing the **WO #** column label field does not change the current size of the **WO #** data field.



Resizing fields on a Report provides a greater use of the limited space on a page (portrait or landscape).

When a Report is first created, all columns are provided with equidistant spacing, regardless of the amount of information they display.

This can result in columns with great detail being confined and increasing the lines used to display the information.

By resizing the fields to better match the corresponding data, the report can be manipulated to provide a more efficient appearance.

Without Field Resizing

Active PMS Report					
WO #	WO Description	Account	Date Available	Age	Date Needed
66349	A - CHILLER	Engineering Department	04/01/2025	3	05/01/2025
66350	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66351	SEMI-A - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66352	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66353	ac monthly inspection	Engineering Department	04/01/2025	3	05/01/2025
66353	ac monthly inspection	Engineering Department	04/01/2025	3	05/01/2025

With Field Resizing

Active PMS Report					
WO #	WO Description	Account	Date Available	Age	Date Needed
66349	A - CHILLER	Engineering Department	04/01/2025	3	05/01/2025
66350	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66351	SEMI-A - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66352	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66353	ac monthly inspection	Engineering Department	04/01/2025	3	05/01/2025
66353	ac monthly inspection	Engineering Department	04/01/2025	3	05/01/2025
66354	Q - AIR CONDITIONER	Anesthesiology	04/01/2025	3	05/01/2025
66355	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	3	05/01/2025
66356	Q - AIR CONDITIONER, SPLIT A/C	Engineering Department	04/01/2025	3	05/01/2025
66357	Q - AIR CONDITIONER, SPLIT A/C	Engineering Department	04/01/2025	3	05/01/2025
66359	Q - AIR CONDITIONER, SPLIT A/C	Engineering Department	04/01/2025	3	05/01/2025
66360	Q - AIR CONDITIONER, SPLIT A/C	Engineering Department	04/01/2025	3	05/01/2025
66361	Q - AIR CONDITIONER, SPLIT A/C	Engineering Department	04/01/2025	3	05/01/2025
66362	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025
66363	Q - AIR CONDITIONER	Engineering Department	04/01/2025	3	05/01/2025

Group and Sort

Grouping and sorting data on a Report offers the capacity to improve the organization of the information and provide summative data elements within the Report.

As an example, we will create a group for the Account data field on the Report, sort it alphabetically, and provide group totals by Account.

Creating a new Group

Click the **Grouping** button in the Formatting Toolbar.



*The Grouping dialog box appears

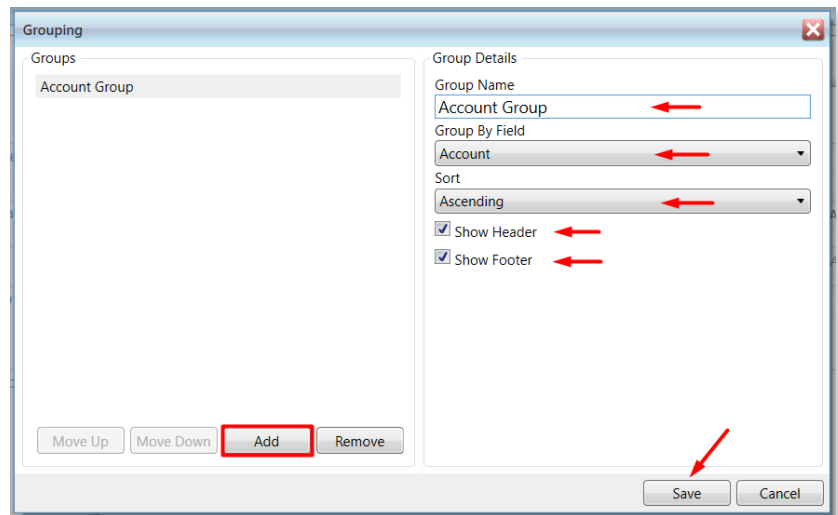
Click the **Add** button to create a new group and enable the group editing fields.

- **Group Name:** Reflects the field that will be grouped (in this case, the Account field).
- **Group By:** Lists all the data fields provided by the Data Source.
- **Sort:** Offers the *None*, *Ascending*, and *Descending* options. As the Account data will be sorted alphabetically, *Ascending* is selected.

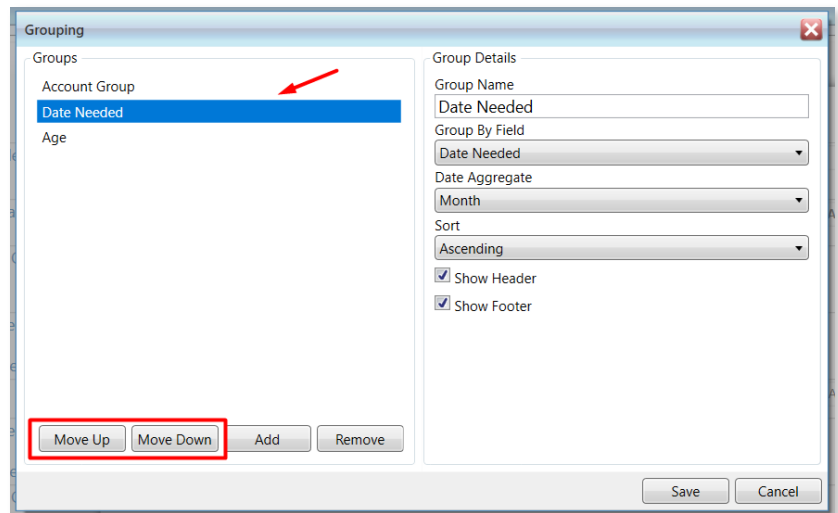
Show Header: If checked, TMS creates a new header section for the group.

Show Footer: If checked, TMS creates a new footer section for the group.

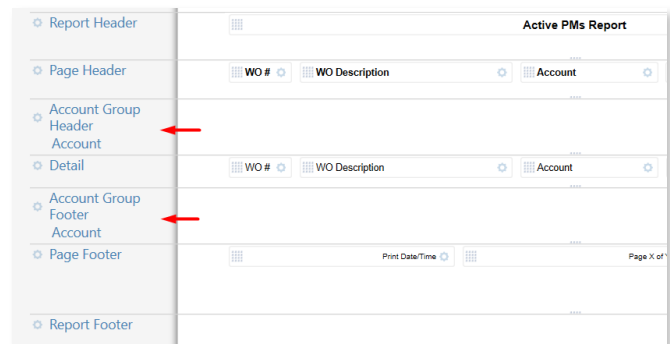
Click **Save**.



Note: As multiple groups are added to a Standard Report, the **Move Up** and **Move Down** buttons can be used to re-order the groups on the Report.



Once a new grouping is created (with **Show Header** and **Show Footer** checked), the Page Layout Pane will present the new sections.



By adding a grouping with header and footer sections, the Report preview will reflect an additional space before and after each Account section, and sort them in alphabetical order due to the *Ascending* option selected in the grouping.

The **red** arrows indicate the header and footer of the *Anesthesiology* Account.

The **blue** arrows indicate the header and footer of the *Biomed Department* Account.

Active PMs Report					
WO #	WO Description	Account	Date Available	Age	Date Needed
→					
66354	Q - AIR CONDITIONER	Anesthesiology	04/01/2025	3	05/01/2025
66355	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	3	05/01/2025
66484	Q - REACH IN REFRIGERATOR	Anesthesiology	04/01/2025	3	05/01/2025
66552	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	3	05/01/2025
66570	test	Anesthesiology	04/01/2025	3	05/01/2025
→					
→					
66456	A - ICE MACHINE	Biomed Department	04/01/2025	3	05/01/2025
66457	Q - ICE MACHINE	Biomed Department	04/01/2025	3	05/01/2025
66458	SEMI-A - ICE MACHINE	Biomed Department	04/01/2025	3	05/01/2025
66596	test	Biomed Department	04/01/2025	3	05/01/2025
→					

Editing a Grouping Header

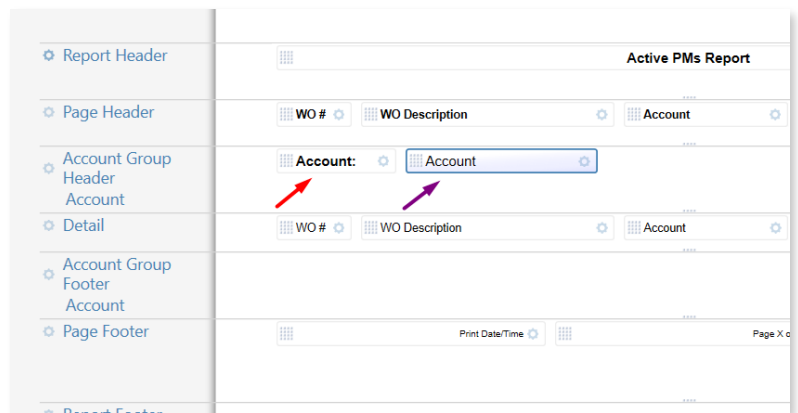
Label and data fields can be used to visibly categorize the sections within a grouping header section.

1: Expand the *Available Fields* section within the elements pane and drag the **Label field** to the group header section.

Note: Once added, the field may be resized or repositioned, as needed.

2: Click the *gear* icon to rename the field from "Label" (default field name) to "**Account:**".

3: Expand the *Data Fields* section within the elements pane; drag the **Account data field** to the group header next to the label field.



*The Report preview displays the new label and data fields above each respective section.

Active PMs Report					
WO #	WO Description	Account	Date Available	Age	Date Needed
→ Account:	Anesthesiology				
66354	Q - AIR CONDITIONER	Anesthesiology	04/01/2025	7	05/01/2025
66355	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	7	05/01/2025
66484	Q - REACH IN REFRIGERATOR	Anesthesiology	04/01/2025	7	05/01/2025
66552	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	7	05/01/2025
66570	test	Anesthesiology	04/01/2025	7	05/01/2025
66663	Test M and C	Anesthesiology	04/05/2025	3	04/12/2025
→ Account:	Biomed Department				
66456	A - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66457	Q - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66458	SEMI-A - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66596	test	Biomed Department	04/01/2025	7	05/01/2025

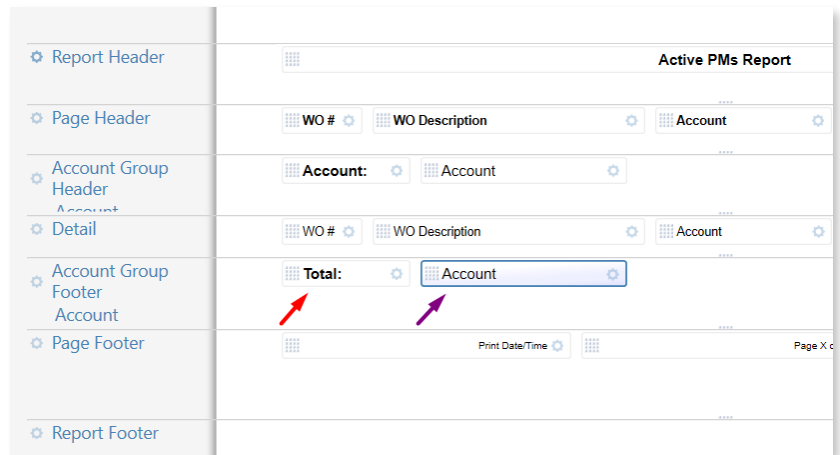
Editing a Grouping Footer

Label and data fields can be used to provide aggregate data within a grouping footer section.

1: Expand the *Available Fields* section within the elements pane and drag the **Label field** to the group footer section.

2: Click the *gear* icon to rename the field from "Label" (default field name) to "**Total:**".

3: Expand the *Data Fields* section within the elements pane; drag the **Account data field** to the group footer next to the label field.



4: Click the *gear* icon on the Account field.

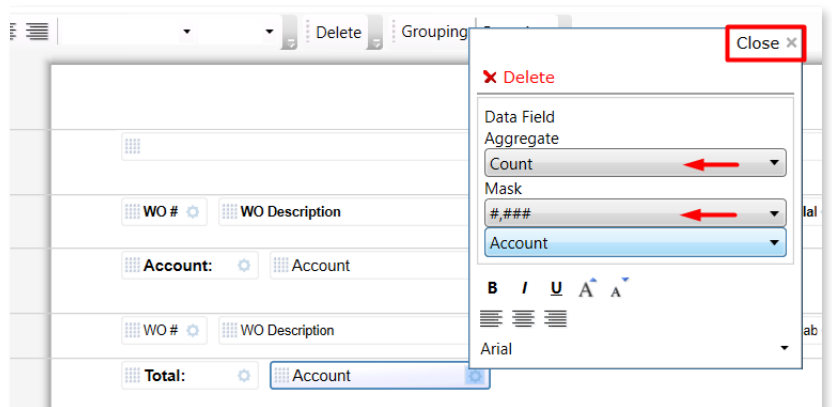
- **Aggregate dropdown:** Offers the options Average, Count, Max, Min, and Sum.

In this case, select the **Count** option to provide a total number for each Account.

- **Mask dropdown:** Controls how the resultant numbers are displayed, whether with decimal places, in percentages, or as currency.

In this example, select the strictly numerical option (without decimals).

5: Click **Close**.



*The Report preview displays the new label and data field below each respective section.

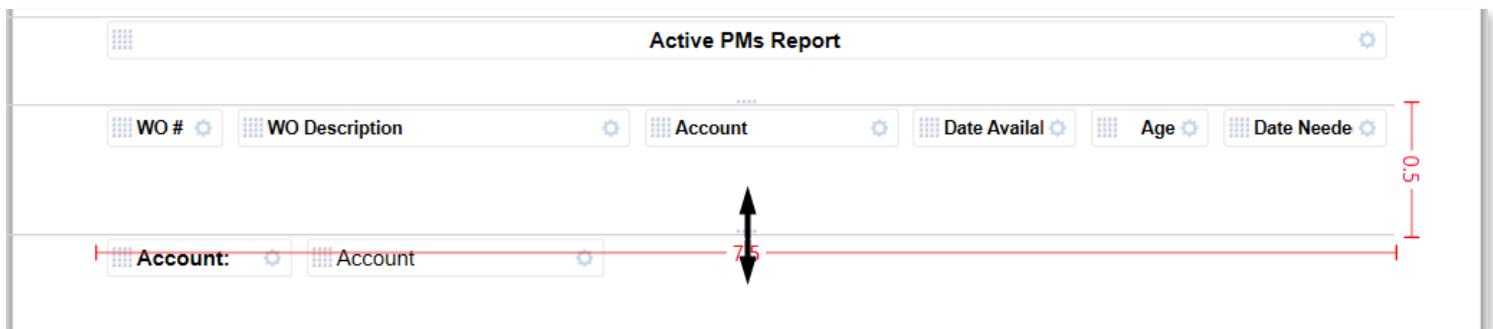
Active PMS Report					
WO #	WO Description	Account	Date Available	Age	Date Needed
Account: Anesthesiology					
66354	Q - AIR CONDITIONER	Anesthesiology	04/01/2025	7	05/01/2025
66355	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	7	05/01/2025
66484	Q - REACH IN REFRIGERATOR	Anesthesiology	04/01/2025	7	05/01/2025
66552	Q - AIR CONDITIONER, WINDOW	Anesthesiology	04/01/2025	7	05/01/2025
66570	test	Anesthesiology	04/01/2025	7	05/01/2025
66663	Test M and C	Anesthesiology	04/05/2025	3	04/12/2025
Total:	6				
Account: Biomed Department					
66456	A - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66457	Q - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66458	SEMI-A - ICE MACHINE	Biomed Department	04/01/2025	7	05/01/2025
66596	test	Biomed Department	04/01/2025	7	05/01/2025
Total:	4				

Resizing the Page Layout

As groupings are added to Standard Reports, adjusting the space between the various report sections (i.e. Report Header, Page Header, Group Header, Detail section, etc.) may improve the overall appearance of the Report.

To adjust the spacing between Report sections, hover the mouse over the **move handles** (4 dots) until the cursor turns into two directional arrows, and then left-click and drag the section line upward or downward, as preferred.

When you left-click to adjust the section(s), you will see red measuring elements appear, providing the specific sizes of the section being affected.



Info / Contact Support

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