



TMS SIDEKICK

First Time Setup Guide

Accruent Confidential and Proprietary, copyright 2025. All rights reserved.

This material contains confidential information that is proprietary to, and the property of, Accruent, LLC. Any unauthorized use, duplication, or disclosure of this material, in whole or in part, is prohibited.

No part of this publication may be reproduced, recorded, or stored in a retrieval system or transmitted in any form or by any means—whether electronic, mechanical, photographic, or otherwise—without the written permission of Accruent, LLC.

The information contained in this document is subject to change without notice. Accruent makes no warranty of any kind with regards to this material, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. Accruent, or any of its subsidiaries, shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this material.

Table of Contents

Introduction

- Purpose

- What is Sidekick?

First Steps

- Download and Configuration

- Wi-Fi Network

Mobile Profiles

- Overview

Creating a Mobile Profile

- How to Create a Mobile Profile

- Data

- General Options

- TMS Sidekick Options

- Optional – How to Create a Saved Query

Configuring Sidekick on iOS

- Sidekick Settings

- Logging Into Sidekick

Troubleshooting

- Common Errors

Info / Contact Support

Introduction

Purpose

This document goes over the prerequisites for using Sidekick for the first time.

In summary, you will:

- Ensure the Sidekick web service (AKA *MobileSync*) is active
- Setup mobile profiles in the main TMS application
- Install Sidekick on your iOS device
- Configure Sidekick in iOS Settings

What is Sidekick?

The TMS Sidekick app is an add-on application that allows users to complete Work Orders, edit Asset records, and more from their iOS devices.

It includes functionalities such as creating and editing Work Orders, querying for Assets, and managing Materials.

The app is designed to enhance the capabilities of the main TMS application by providing mobile access to essential features.

First Steps

Download and Configuration

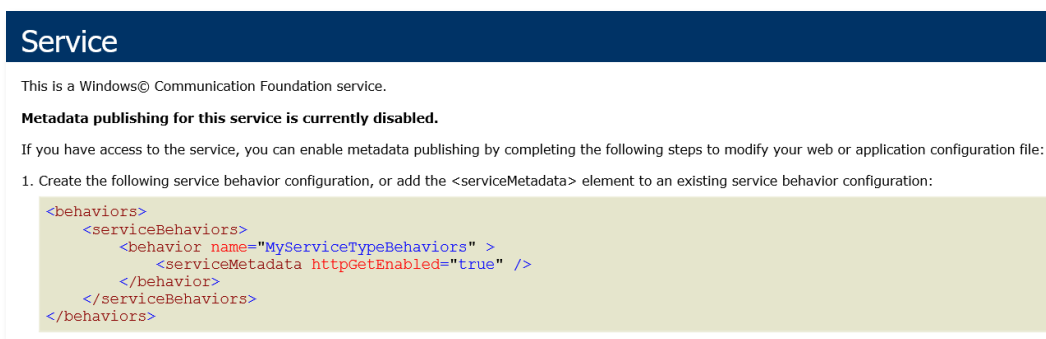
1. Download TMS Sidekick from the Apple App Store (search for “TMS Sidekick”).
2. Navigate to *Settings* > *TMS Sidekick* on your Apple device.

Here you will see a blank for your Web Service URL. Make sure that this web address is the following:

TMS Online: [https://\[OrgNameHere\].tmsonline.com/MobileSync/MobileSync.svc](https://[OrgNameHere].tmsonline.com/MobileSync/MobileSync.svc)

TMS OnSite: [https://\[ServerNameHere\]/MobileSync/MobileSync.svc](https://[ServerNameHere]/MobileSync/MobileSync.svc)

To verify that you have input your Web Service URL correctly, you can type the same URL into any web browser, and it should take you to a page that is titled by a blue banner that reads "MobileSync Service" or "Service".



The address for this page should be **exactly the same** address you type into the Web Service URL blank field.

Note: MobileSync is repeated twice in the URL

If you are not sure what goes in the “[ServerNameHere]” / “[OrgNameHere]” blank, you can find this information by looking at the URL used to access the main TMS application from.

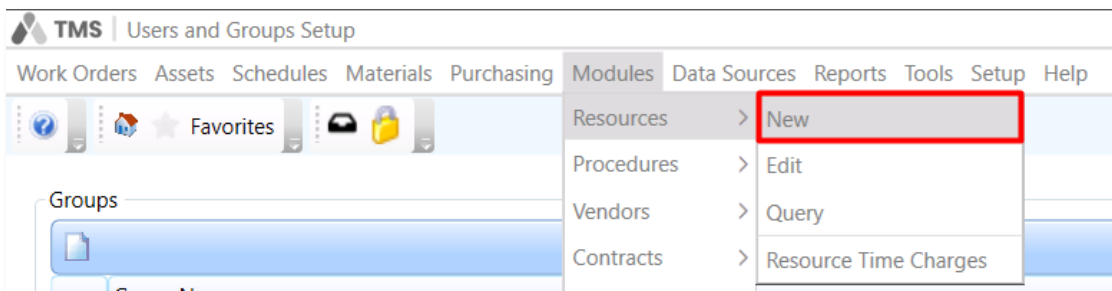
TMS Online: This URL should look like [https://\[OrgNameHere\].tmsonline.com](https://[OrgNameHere].tmsonline.com) and you would simply add “MobileSync/MobileSync.svc” after “.com”.

TMS OnSite: This URL should look like [https://\[ServerNameHere\]/TMSCLIENT](https://[ServerNameHere]/TMSCLIENT) and you would simply replace “TMSCLIENT” with “MobileSync/MobileSync.svc”.

Note: If this blue banner page does not appear then please contact TMS Technical Support and we can assist you in fixing this issue.

3. Next, create a Resource from within the main TMS application (not on TMS Sidekick) if you do not already have one set up for your TMS User.

Go to *Modules > Resources > New*.



Fill in the necessary fields and save the Resource.

Note: Once created, a Resource's *Resource Number* cannot be changed, so make sure to follow the naming convention your organization uses for the "Resource Number" field, if there is any.

4. Once the Resource is created, it must be tied to the corresponding TMS User.

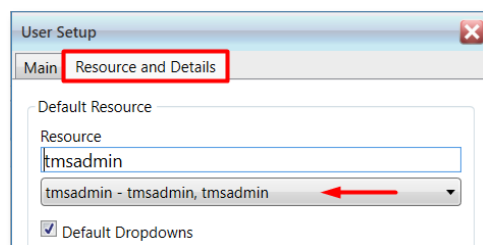
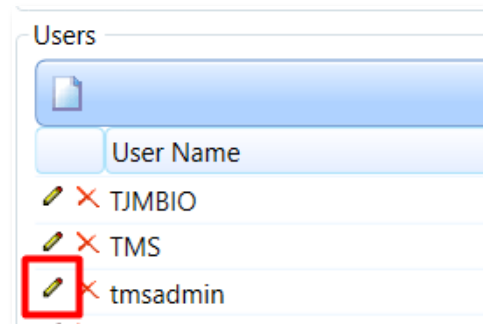
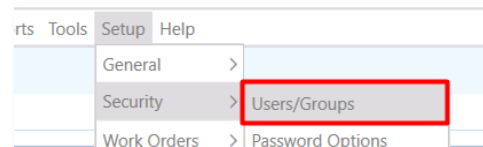
Go to *Setup > Security > Users/Groups*.

Find the TMS User in question and click its pencil icon.

Go to the *Resource and Details* tab.

Select the Resource that corresponds to the TMS User in question.

Click *Save*.



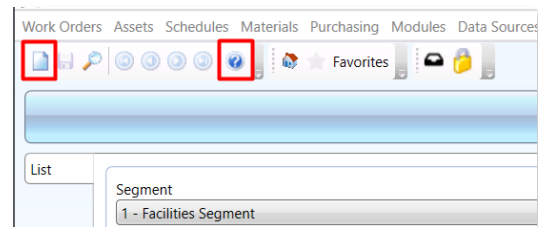
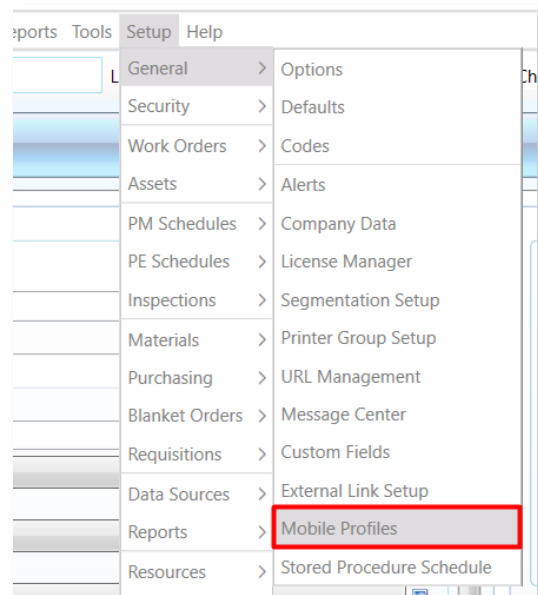
5. Once you have tied the Resource to the corresponding TMS User, you can create their Mobile Profile.

Go to *Setup > General > Mobile Profiles*.

Click the *paper* icon to create a new Mobile Profile.

Note: While on the screen that displays a list of Mobile Profiles per segment, you can click the *Help* button (blue question mark on toolbar) for more information on Mobile Profiles.

Note: You can only create one Mobile Profile per TMS User.



Wi-Fi Network

TMS Online customers should be able to sign in to TMS Sidekick on any Wi-Fi network.

TMS Onsite (OnSite/On-Premise) customers will most likely have to connect to the same Wi-Fi network used to access the main TMS application.

After you've successfully created your Mobile Profile and made sure that your Web Service URL is correct, you should be able to sign in to TMS Sidekick with the same credentials you use to log in to the TMS application.

Mobile Profiles

Overview

Mobile Profiles determine which data filters are applied when a user synchronizes their device with the main TMS database.

They also determine which Forms are used in the Work Orders and Assets modules and allow Admins to enable/disable certain items of functionality for the user.

Creating a Mobile Profile

How to Create a Mobile Profile

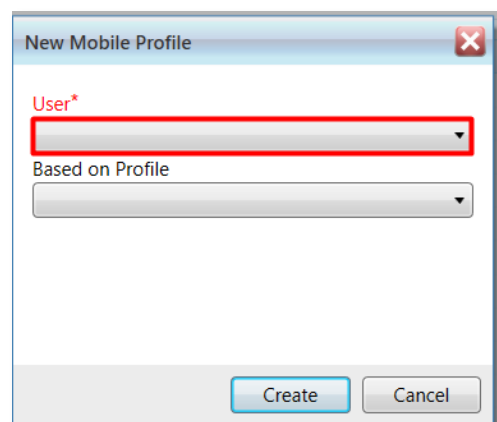
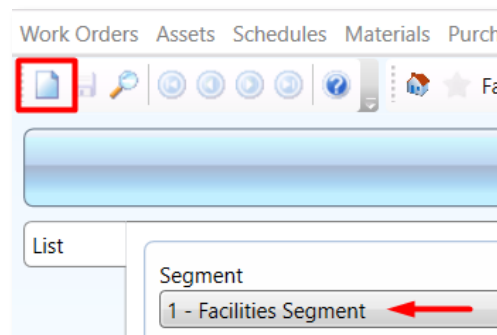
As explained in Step 5 of the **Download and Configuration** section:

1. Go to *Setup > General > Mobile Profiles*.
2. Verify that the Segment shown in the Segment dropdown is the one in which you want to create the new Mobile Profile.
3. Click the *paper* icon in the toolbar.

Note: You can only create one Mobile Profile per TMS User.

4. In the User dropdown, select the TMS User to tie to the Profile.
5. Click Create to add the Profile.

Note: The “Based on Profile” dropdown allows you to duplicate the settings of an already existing Mobile Profile onto the one being created.



*The Profile's Main tab appears.

TMS | Mobile Profile - Edit Logout - tmsadmin

Work Orders | Assets | Schedules | Materials | Purchasing | Modules | Data Sources | Reports | Tools | Setup | Help

List | Main

Profile
Name: TMS Admin
Userid: tmsadmin - TMS Admin

Data
Work Orders
Assets
Materials

All Active Work Orders Assigned to Selected User
 All Active Assets Assigned to Selected User

General Options
Work Order Form: [Disable Work Order Module]
Asset Form: [Disable Asset Module]

Asset Sweep
 Physical Counts
 Use automatic Time Charges in My Work Orders

TMS Notebook / Mobile 6.5
 All Materials in Common and User's Segments
My Work Orders Form: [Disable My Work Orders]
Show in WO Query Results: [Work Order Description]
Work Order Description: [Work Order Description]
My Work Orders by: [Work Order Description]

TMS Sidekick Options
Material Form: [Disable Material Module]
 Completed Work Orders
Within how many days?: 0

The values you select in the Mobile Profile page determine what information and functionality is/isn't available to the user when they log into TMS Sidekick.

Select the saved queries, forms, and functionality to be made available to the user from the below field groups.

Data

This section displays the Saved Query dropdowns and search options to be used to pull data from the TMS database to the device.

If you want the user to have access to just Active Work Orders and Assets assigned to them, leave the dropdowns blank, and enable the 2 checkbox options below.

Data

Work Orders
Assets
Materials

All Active Work Orders Assigned to Selected User
 All Active Assets Assigned to Selected User

General Options

This section displays the Form dropdowns to be used in the Work Orders and Assets module (if enabled), and other functionalities that can be made available.

Note: You **must** select a Work Order and an Asset Form from the dropdowns shown below; otherwise, the user will not have the ability to see records in Sidekick.

Note: **Use automatic Time Charges in My Work Orders** is a commonly used option when setting up Mobile Profiles, as it automatically assigns charged time to the User/Resource logged in on the device.

When a Work Order is selected in "My Work Orders," Sidekick records the length of time from the moment the Work Order is opened to when the User saves it, creating a Time Charge for the time recorded.

General Options

Work Order Form
Work Order (TMS Enterprise)

Asset Form
Assets Master (TMS Mobile)

Asset Sweep

Physical Counts

Use automatic Time Charges in My Work Orders

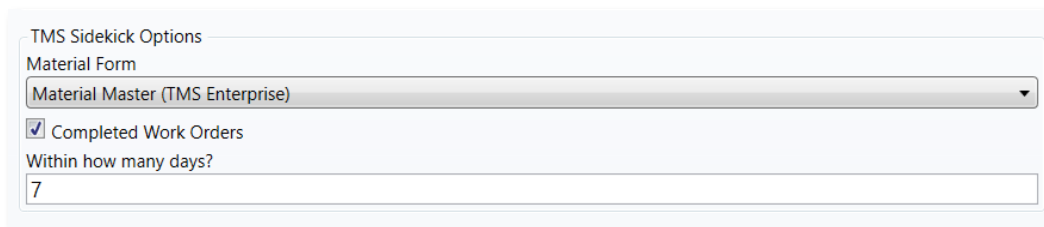
TMS Sidekick Options

This section displays three *non-mandatory* items:

Material Form: The form that will be used on the Material Edit (read only) screen.

Completed Work Orders: Select this option if you want Closed and Completed Work Orders to be viewable in TMS Sidekick.

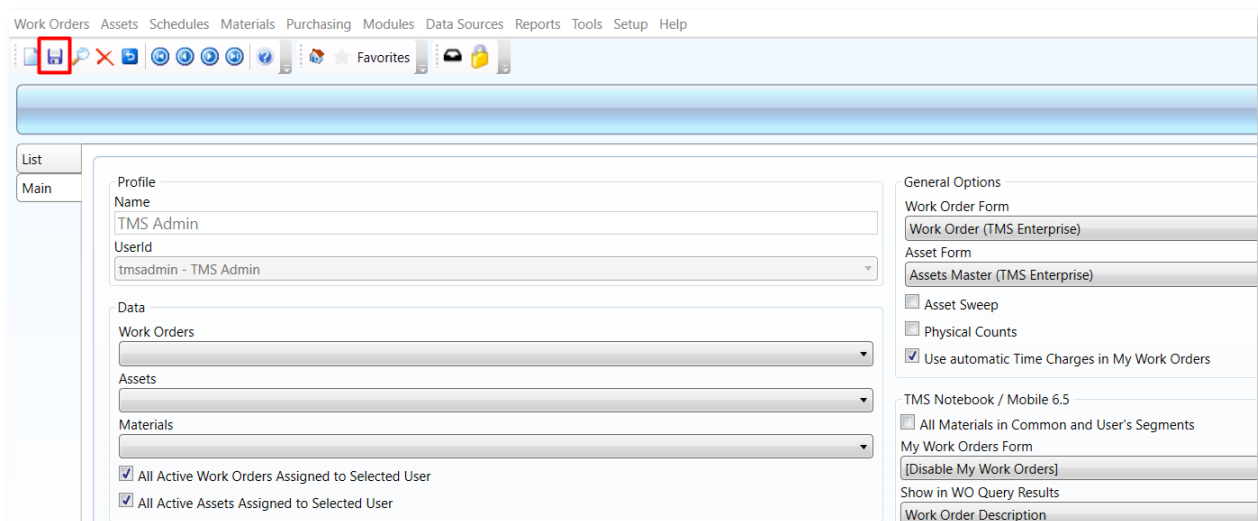
Within how many days? This field related to the option before it. Enter a value (in days) for how far back TMS Sidekick should look for Closed and Completed Work Orders.



The screenshot shows a dialog box titled "TMS Sidekick Options". It contains the following fields:

- Material Form:** A dropdown menu with "Material Master (TMS Enterprise)" selected.
- Completed Work Orders**
- Within how many days?:** A text input field containing the number "7".

When the Mobile Profile is complete, click the Save button.



The screenshot shows the TMS Sidekick Mobile Profile configuration screen. The top navigation bar includes "Work Orders", "Assets", "Schedules", "Materials", "Purchasing", "Modules", "Data Sources", "Reports", "Tools", "Setup", and "Help". A "Save" button is highlighted with a red box in the top-left corner of the main content area. The main content area is divided into several sections:

- Profile:** Name: "TMS Admin", Userid: "tmsadmin - TMS Admin".
- Data:** Work Orders, Assets, and Materials dropdown menus.
- All Active Work Orders Assigned to Selected User
- All Active Assets Assigned to Selected User
- General Options:** Work Order Form: "Work Order (TMS Enterprise)", Asset Form: "Assets Master (TMS Enterprise)", Asset Sweep, Physical Counts, Use automatic Time Charges in My Work Orders.
- TMS Notebook / Mobile 6.5:** All Materials in Common and User's Segments.
- My Work Orders Form:** "[Disable My Work Orders]"
- Show in WO Query Results:** Work Order Description

Optional – How to Create a Saved Query

As previously stated, if you want to allow the User to view more than their Work Orders and Assets assigned, you can select a Saved Query from the corresponding dropdowns in the Data Section.

If none of the available Saved Queries meets your needs, you can create one by following the below steps:

1. Go to *Work Orders > Query*.

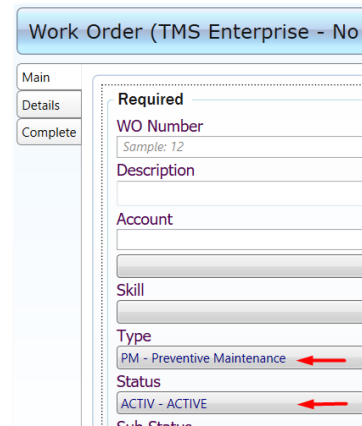
Note: The same steps apply for an Asset Saved Query.

2. Specify the criteria for the query (in this example, we are creating a query for all Active Work Orders of the Type “PM”).

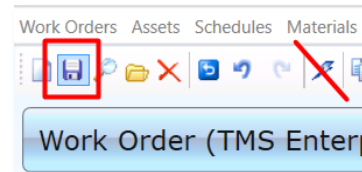
3. Click **Save** **instead of executing the query** with the *lightning bolt* icon.

4. Name your Saved Query and click **Save**.

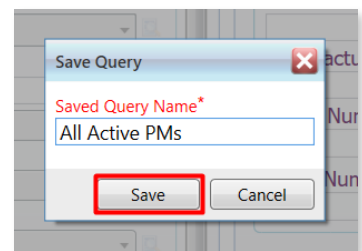
Once the Saved Query is saved, you can go back to *Setup > General > Mobile Profiles* and select it from the corresponding dropdown menu.



The screenshot shows a software interface for creating a query. The title bar reads "Work Order (TMS Enterprise - No)". On the left, there are tabs for "Main", "Details", and "Complete". The "Required" section contains several fields: "WO Number" with a sample value of "12", "Description", "Account", "Skill", and "Type". The "Type" dropdown is set to "PM - Preventive Maintenance" and has a red lightning bolt icon next to it. The "Status" dropdown is set to "ACTIV - ACTIVE" and also has a red lightning bolt icon next to it.



The screenshot shows a toolbar with several icons. The save icon, which is a blue floppy disk, is highlighted with a red square. Other icons include a folder, a red X, a blue lightning bolt, a blue circular arrow, a blue square with a white X, and a blue document icon. Below the toolbar, the title bar of the "Work Order (TMS Enterprise - No)" window is visible.



The screenshot shows a "Save Query" dialog box. It has a title bar with a close button (X). The text "Saved Query Name*" is followed by a text input field containing "All Active PMs". At the bottom, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red square.

Configuring Sidekick on iOS

Sidekick Settings

Going straight to the Sidekick app after installing it will show a login screen that prompts for an **Email Address**, rather than a **Username**.

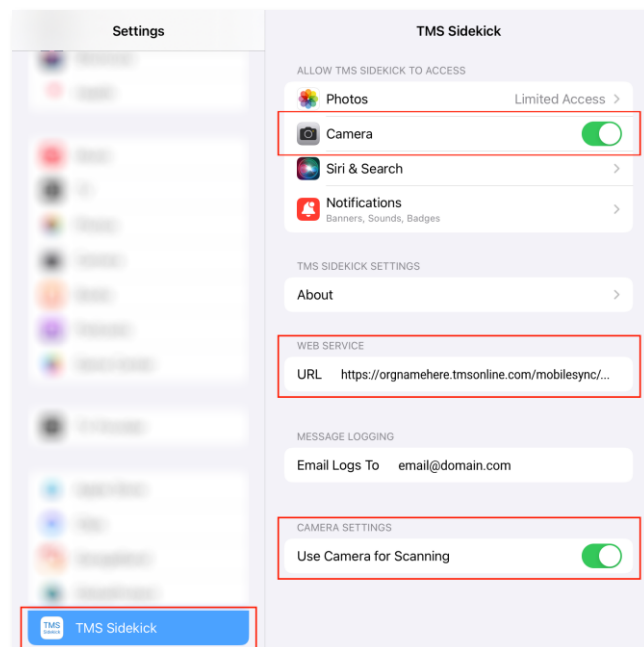
The app is initially connected to the Sidekick demo site, which is a good indicator that the Web Service URL has yet to be configured.

1. On the Settings screen, scroll down to the TMS Sidekick label and select it.
2. Select the URL field, then enter the URL TMS Sidekick needs to point to.

As stated in the **Download and Configuration** section, this is usually formatted as:

TMS Online: [https://\[OrgNameHere\].tmsonline.com/MobileSync/MobileSync.svc](https://[OrgNameHere].tmsonline.com/MobileSync/MobileSync.svc)

TMS OnSite: [https://\[ServerNameHere\]/MobileSync/MobileSync.svc](https://[ServerNameHere]/MobileSync/MobileSync.svc)



3. Exit the Settings screen by pressing the *Home* button on your device.

Note: If you opened Sidekick previously, you'll need to kill the app before re-launching it for the settings to apply. Do this by:

- Double tapping the *Home* button to bring up recently used apps.
- Find Sidekick and simply swipe upwards.
- Re-open Sidekick and login.

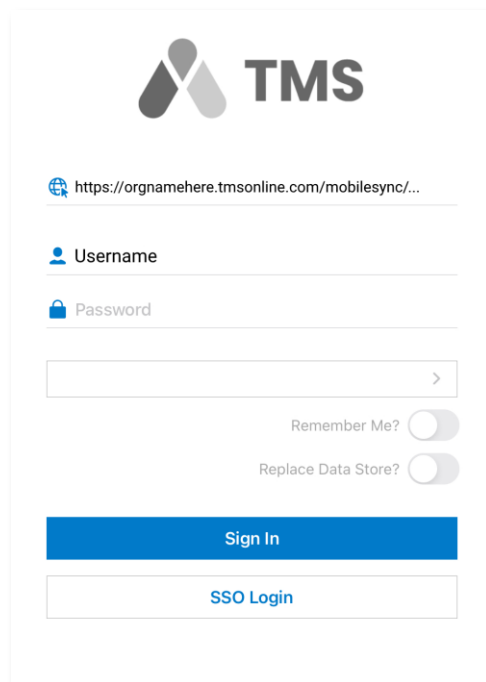
Logging Into Sidekick

The same credentials you use for the TMS application will apply to Sidekick.

If your organization utilizes Active Directory, choose the Domain; otherwise, leave it blank.

The **Replace Data Store** option gives users the ability to clear any data cached within the device – a good troubleshooting step for any general issues you may experience with the application.

Note that if you enable this option when logging in, any previous work on Sidekick that you have not synced with TMS may be cleared.



The screenshot shows the TMS mobile sync login interface. At the top is the TMS logo, consisting of a stylized 'A' icon and the text 'TMS'. Below the logo is a URL field containing 'https://orgnamehere.tmsonline.com/mobilesync/...'. There are two input fields: 'Username' with a person icon and 'Password' with a lock icon. Below these fields is a right-pointing arrow button. Two toggle switches are present: 'Remember Me?' and 'Replace Data Store?'. At the bottom, there is a blue 'Sign In' button and a white 'SSO Login' button.

Troubleshooting

Common Errors

Below you can find some errors that might occur while using Sidekick. Though details and solutions are listed along with each error, it is not guaranteed that the solution will work 100% of the time.

If any issues arise, contact Accruent Support for assistance.

Arithmetic overflow error converting IDENTITY to data type int.

Details: This can happen due to accumulated sync errors over time, causing the IDENTITY column to exceed its limit.

Solution: Truncate the table and reseed the IDENTITY column. Reach out to Support / IT and have the script below run on the TMS PROD database.

```
TRUNCATE TABLE tblsidekicksynckeys  
DBCC CHECKIDENT ('tblsidekicksynckeys', RESEED, 1).
```

Connection URL unreachable. Unknown secure transport error. 'Peer handshake fail'.

Details: This can happen if the Web Service URL within the iOS settings is not configured correctly.

Solution: Ensure that the URL is formatted correctly and matches your organization's URL for TMS. The URL should be in the format:

On-Site: [https://\[servername\]/mobilesync/mobilesync.svc](https://[servername]/mobilesync/mobilesync.svc)

Online: [https://\[organizationname\].tmsonline.com/mobilesync/mobilesync.svc](https://[organizationname].tmsonline.com/mobilesync/mobilesync.svc)

Your connection is not private.

Details: The Web Config file on the application server might either not be configured correctly or not be pointing to the correct server or database.

Solution: Go to *C:\Program Files (x86)\FRSoft\TMS OnSite\TMS Sidekick Web Service* and comment out the HTTP binding line on the sidekick web config file.

Before:

```
<endpoint address="" binding="basicHttpBinding" bindingConfiguration="standard" contract="MobileSync.Service.IMobileSync" />
```

After:

```
<!--<endpoint address="" binding="basicHttpBinding" bindingConfiguration="standard" contract="MobileSync.Service.IMobileSync" />-->
```

TMS does not allow this application.

Cause: This occurs if Sidekick is not allowed access to the iOS camera.

Solution: Access the device *Settings > Sidekick* and enable access to the camera. If the issue persists, install a PDF document reader as Adobe Acrobat on the mobile device.

Unable to Sync | A Sync Process is Still Running for This Device Please Try Again Later.

Cause: This occurs when a sync process is initiated but interrupted, causing the device to get stuck waiting for the old sync process to complete. This can happen due to connectivity issues or interruptions by firewalls or other filters in the environment.

Solution: Enable 'Replace Data Store' on the login screen at next login attempt.

NOTE: The 'Replace Data Store' option is designed to only be enabled/used to address login issues and should otherwise be unchecked as enabling this option will clear any previous work on Sidekick that has not been synced with TMS.

An error occurred during sync. Could not get data: Could not get data for type WORK_ORDERS: The username or password is incorrect.

Cause: This might occur due to web services hanging or network disruptions.

Solution: Recycle the app pools.

1. Open IIS Manager:
2. On Windows Server, go to *Start Menu > Administrative Tools > Internet Information Services (IIS) Manager*.
On Windows 10/11, you can search for IIS Manager in the Start menu.
3. Navigate to Application Pools:
In the Connections pane (left sidebar), select Application Pools under your server's hostname.
4. Select the Application Pool FRSoft v4.0:
Find the application pool you want to recycle from the list.
5. Recycle the Application Pool:
In the Actions pane (right sidebar), click on Recycling....
6. Set the recycling conditions and frequency as needed.

Info / Contact Support

TMS SIDEKICK – First Time Setup Guide

June 2025

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>