TMS ADMIN GUIDE

General TMS administrator guide

Table of contents

Introduction

This document is designed to serve as a general overview to assist with common tasks undertaken by a TMS Administrator. This document is intended to be brief and concise.

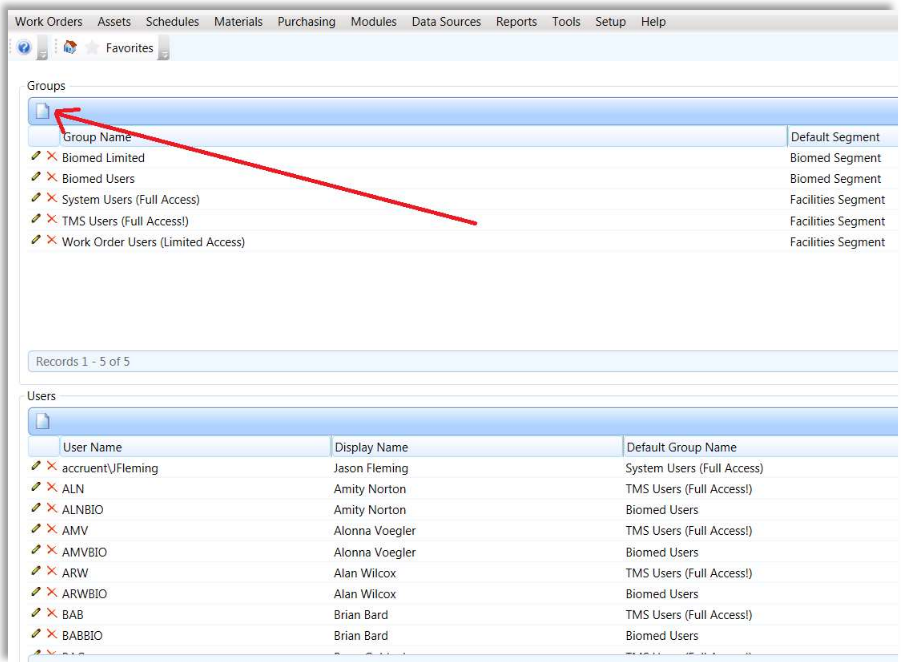
It is intended as an informational tool regarding common TMS Admin tasks. It also serves as great starting place for the most rudimentary tasks of TMS Administration and a reference to other guides will be listed for further reading at the end of many topics.

Creating a Group

Groups are created to give groups of people specified permissions and segment access within the TMS application. Setting permissions will be covered in detail in the "Setting Group Permissions" section of this document. To create a group do the following:

Setup > Security > Users/Groups

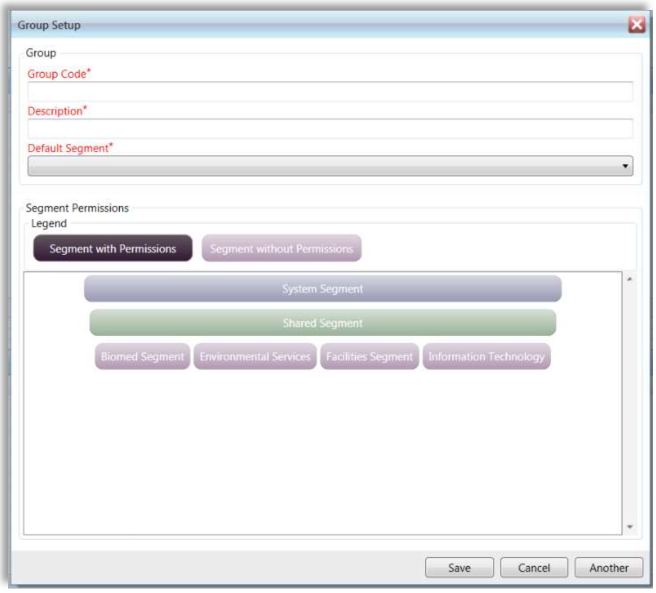
Select the little **paper icon.**



A new window will appear.

Here you will select the segments that the group will have access to.

Click **Save**.

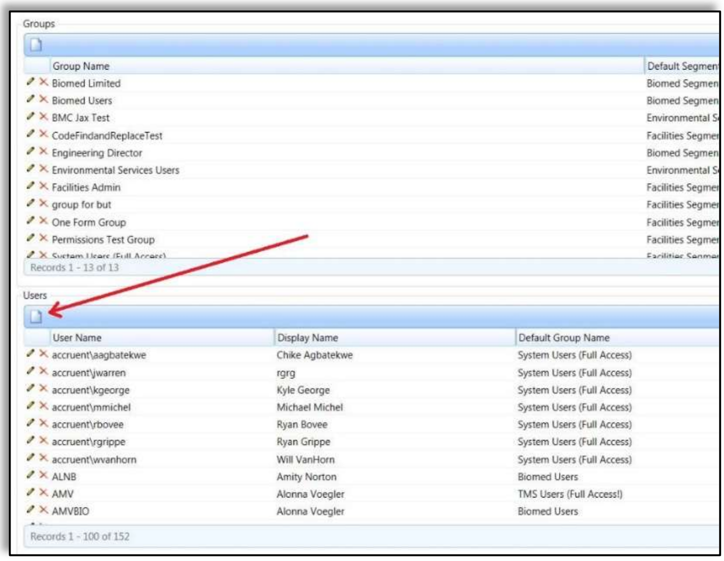


Creating a User

Users within TMS will have a username, password, and specified permissions within the application based on the User Group that they are assigned to. To create a TMS User do the following:

Setup > Security > Users/Groups

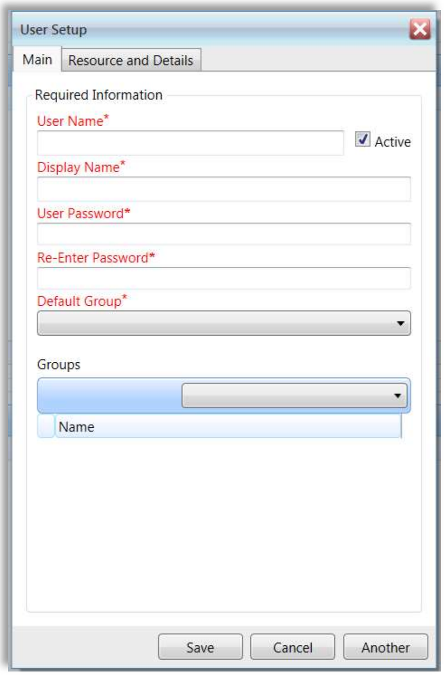
Click on the little paper icon



A new window will appear.

Fill out all the in required including choosing a default group.

Click **Save**.



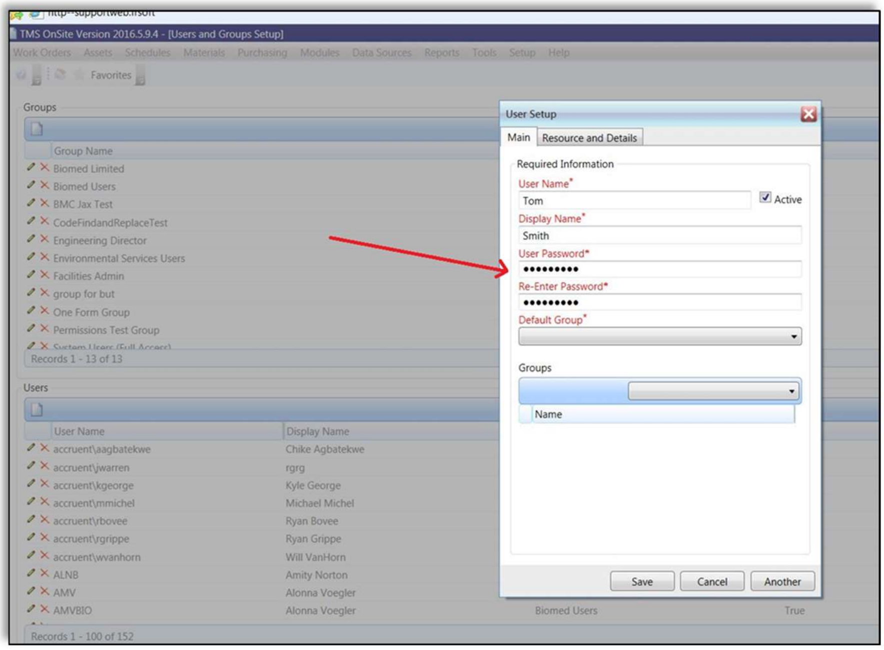
Password Reset

TMS OnLine clients can reset their own passwords by following the Forgot Password link on the login page of the TMS Application. A reset password link will be sent to the email listed in their user info in **Setup > Security > Users/Groups**. TMS OnSite users must have their passwords reset by a TMS Administrator within their organization using the steps below:

Setup > Security > Users/Groups

Click on the pencil icon to the left of user's name. A new window should open.

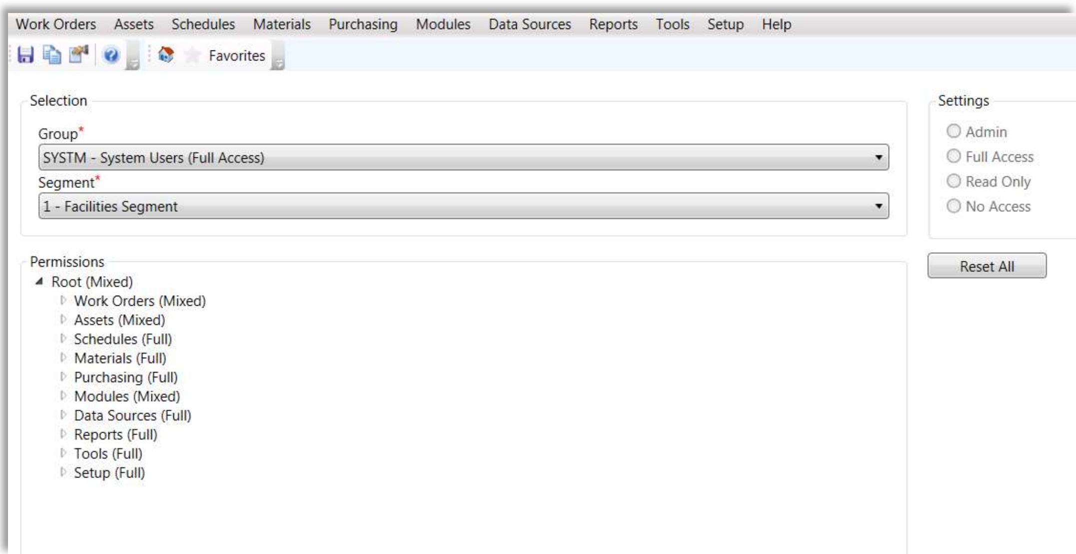
After changing their password and re-entering it in the field below, click **Save**.



Group Permissions

Setup > Security > Permissions

The screen below will enable you to select a group then set permissions per module/function for all the different segments the group has been enabled to access. You can learn how to view and edit the segments a group has access to by reviewing the Group Creation section of this document.



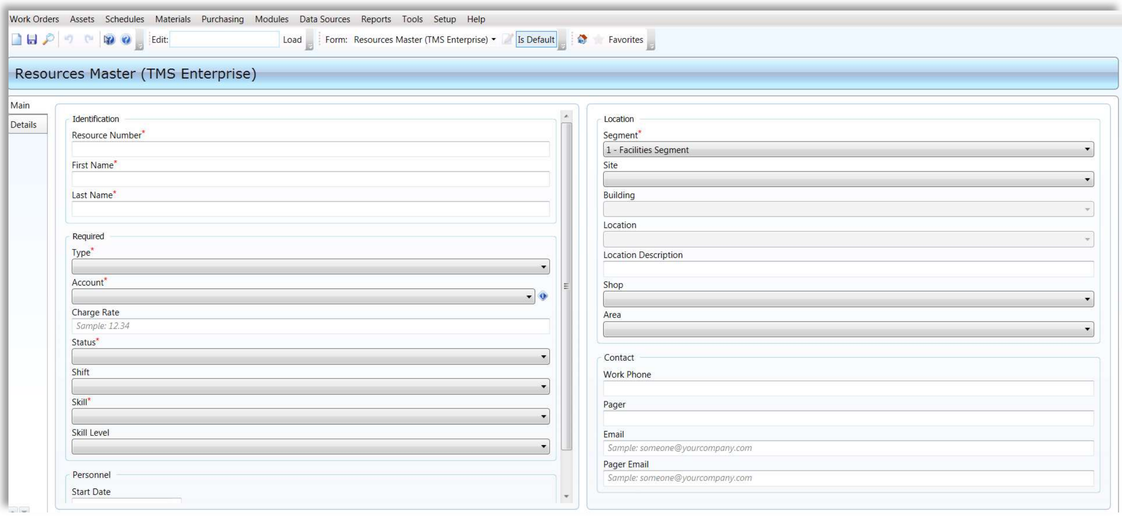
Creating a Resource

A Resource is an individual at your organization who completes WOs and can enter Time Charges on WOs. They won't necessarily have access to the TMS application; users have access to the TMS application. The next section will cover how to tie a created Resource to a User. To create a Resource follow the steps below:

Module > Resources > New

On the screen below, you will fill out all the required info on the Resource.

Save created resource by clicking the **Save icon** (floppy disk) at the top left.

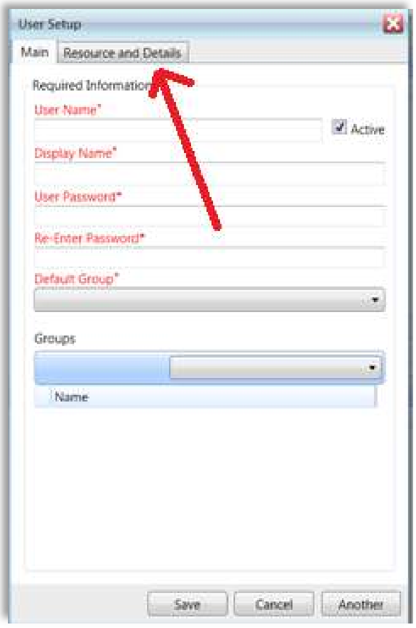


Attaching a Resource to a User

After you have created a Resource and a TMS User, you can tie the two together by going to:

Setup > Security > Users/Groups, then selecting the pencil icon next to the user.

Once doing so, a new window will appear. Choose the **Resource and Details** tab and select the Resource. Click **Save**.



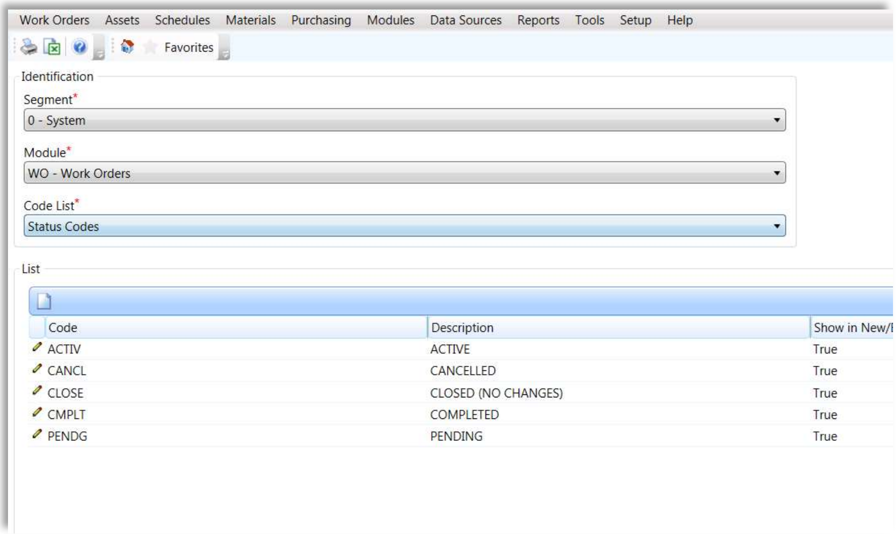
Code Creation

Codes are created by navigating to **Setup > General > Codes.**

Choose the Segment, Module, and Code List to enable you to add, edit, or delete codes used within TMS.

You can click the little paper icon to add codes and the Pencil Icon to edit codes.

While editing a code you can enable or disable a code to show in New/Edit or Query modes



Auto Print Setup

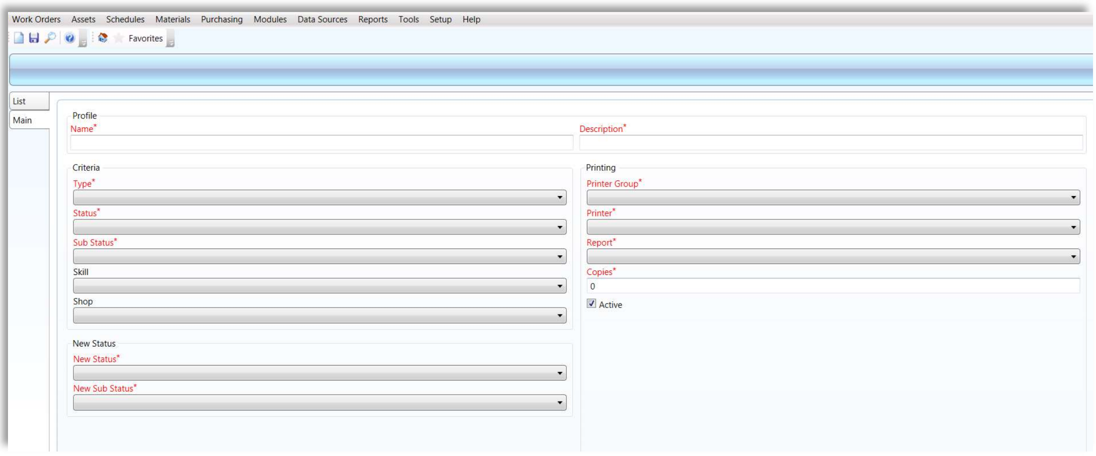
Auto Print enables WOs to print automatically if they meet certain criteria that you specify.

Setup > Work Orders > Auto Print Setup

Below is a screenshot of the Auto Print Setup. The criteria section enables you to choose the triggers of the auto print process.

Note that there is a New Status section. When WOs print automatically, the Status and Sub-status change automatically to the values chosen here.

The Printing section allows you to choose the printer used for this process. If the one desired is not in the list, then please have your local IT department add the printer to TMS Print Services using the IP Address. Doing so will enable the printer to be selected in the setup below.



Automatic Schedule Generation

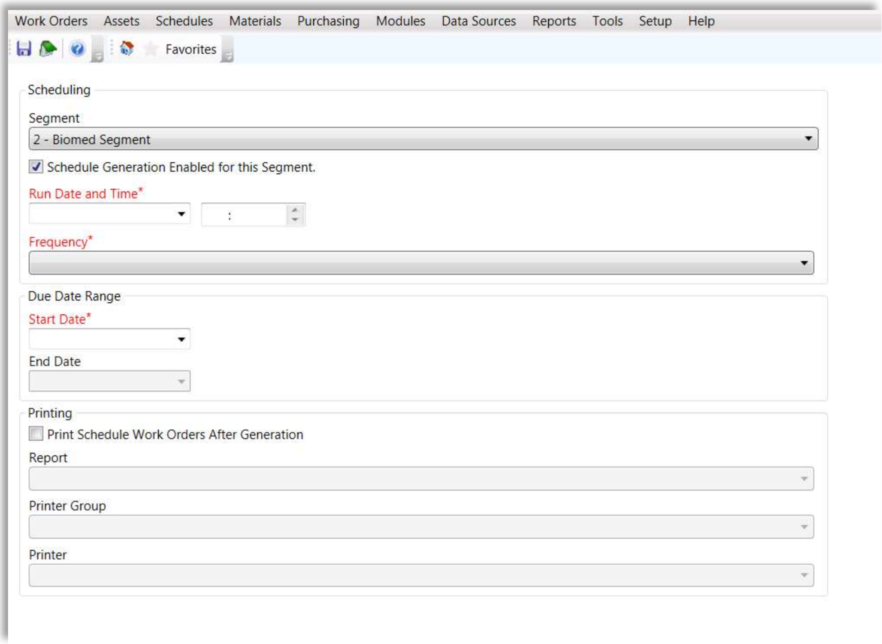
Automatic Schedule Generation enables PM, PE, and Inspection type Work Orders to generate automatically based on the next generation date specified on their Schedule. If the next generation date on the Schedule falls within the Due Date Range in the Automatic Schedule Generation setup, then a WO will automatically generate and simultaneously update the next due date on the Schedule.

Setup > PM Schedules > Automatic Schedule Generation

You will see below that you can set the frequency and the time of day that the Auto Generation occurs.

Also, note that you can enable WOs to automatically print after generation.

The Auto Print Setup in the last section is usually used for Request and Corrective Maintenance type Work Orders and PM/PE/Inspections usually print automatically from the Automatic Schedule Generation setup below.



Custom Forms

Custom Forms enable you to see fields, tabs, and field arrangements in different modules to meet the preference of your organization. Custom forms can be created for Work Orders, Assets, Dashboards, PM, POs, etc. Forms can be created to simplify the use of TMS or enable you to do more advanced queries and creations.

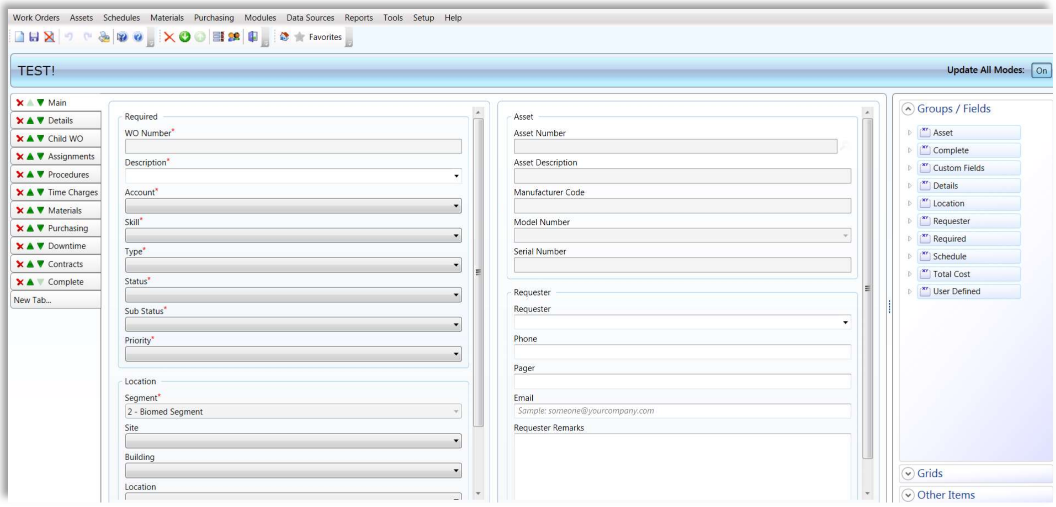
Setup > Custom Forms > New/Edit

You will see below that in the Custom Form editor you can create tabs, move tabs, add fields, move fields, and delete fields.

The fields available for use will be available to the right. Simply drag and drop from the right to the area of the form preferred.

Ensure to save all changes when done at the top left.

The editor can be left anytime using the open door icon on the toolbar.



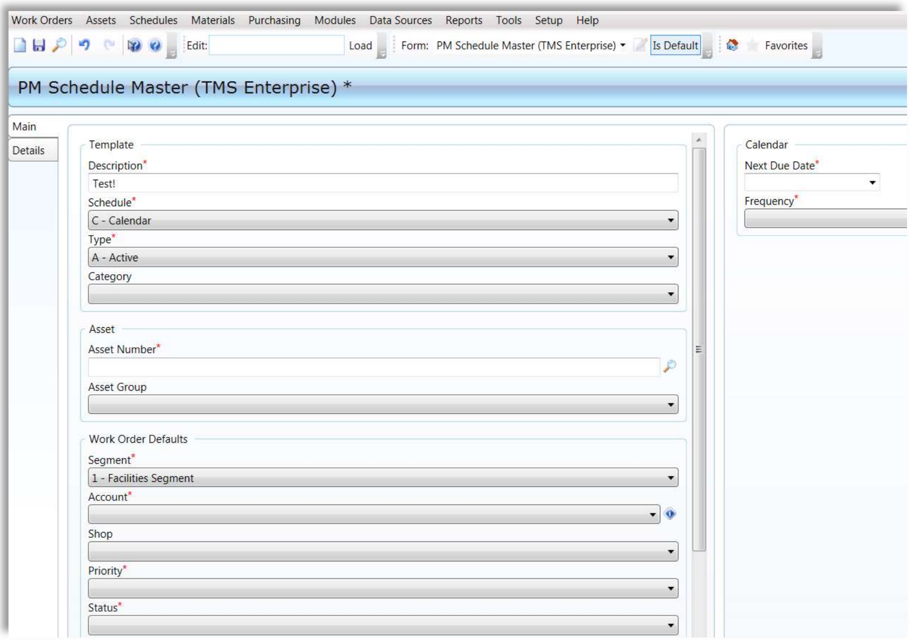
PM Creation

PM stands for Preventive Maintenance. PM Work Orders are done at a scheduled time and in regular intervals. PM schedules generate PM type Work Orders at intervals specified on the PM Schedule during creation.

PM schedules require an Asset to be chosen.

You will see on the right that if the value “Calendar” is chosen then Next Due Date and Frequency fields will become available.

Schedules > PM New



Manual Schedule Generation

Manual Schedule generations can be performed at any time and for a variety of reasons.

You can perform a Manual Schedule Generation to get a PM Work Order sooner, or to receive a PM/PE/Inspection type WO after a failed Auto Generation, or even just for preference over Auto Generation.

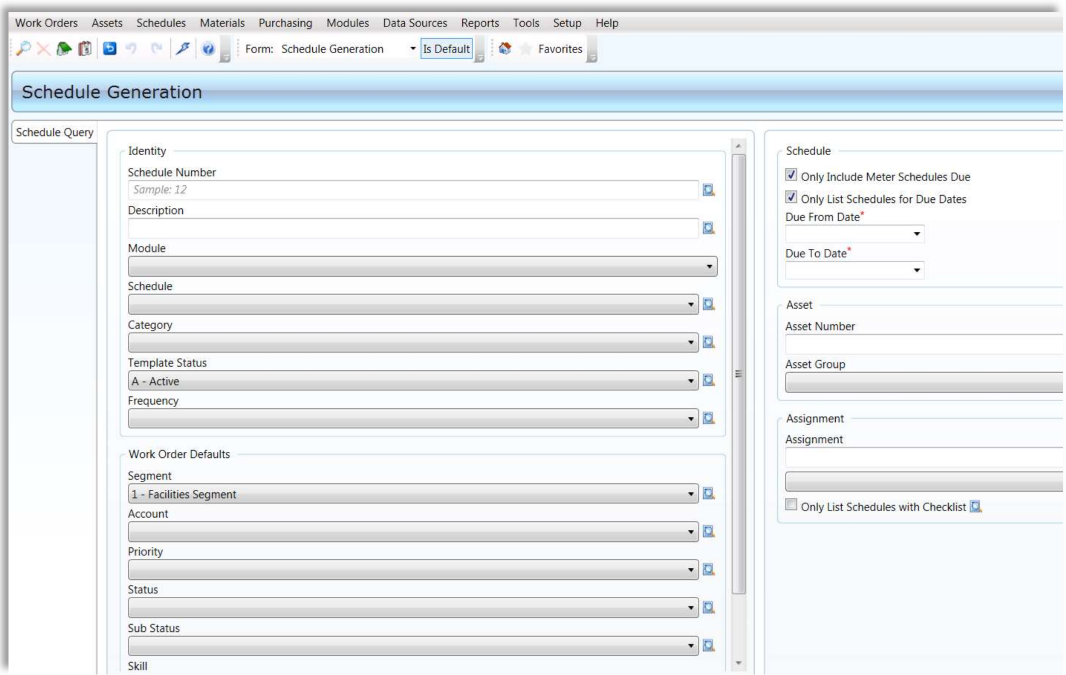
Schedules > Manual Schedule Generation

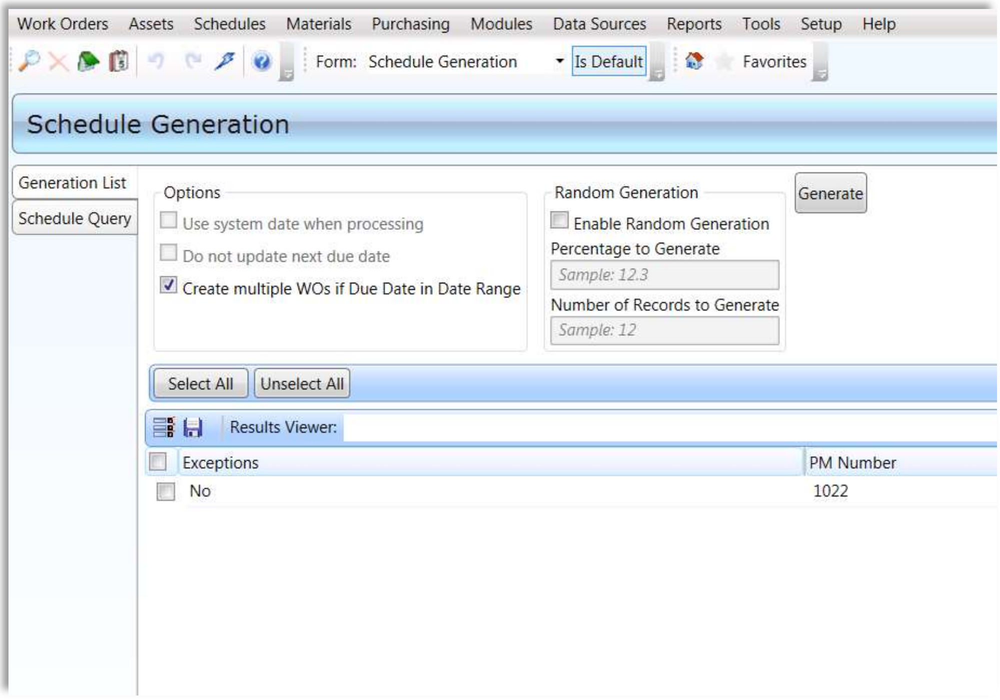
You will see below many different fields to query schedules by. You can chose the Schedule Due date fields to capture PM type WOs that would fall between the chosen ranges.

After choosing the criteria to query, execute the query by selecting the blue lightning bolt icon.

After executing the query, select the Work Orders you wish to generate. Take note that you can enable the WO to generate without updating the next due date among other options.

Click generate to finish the process.

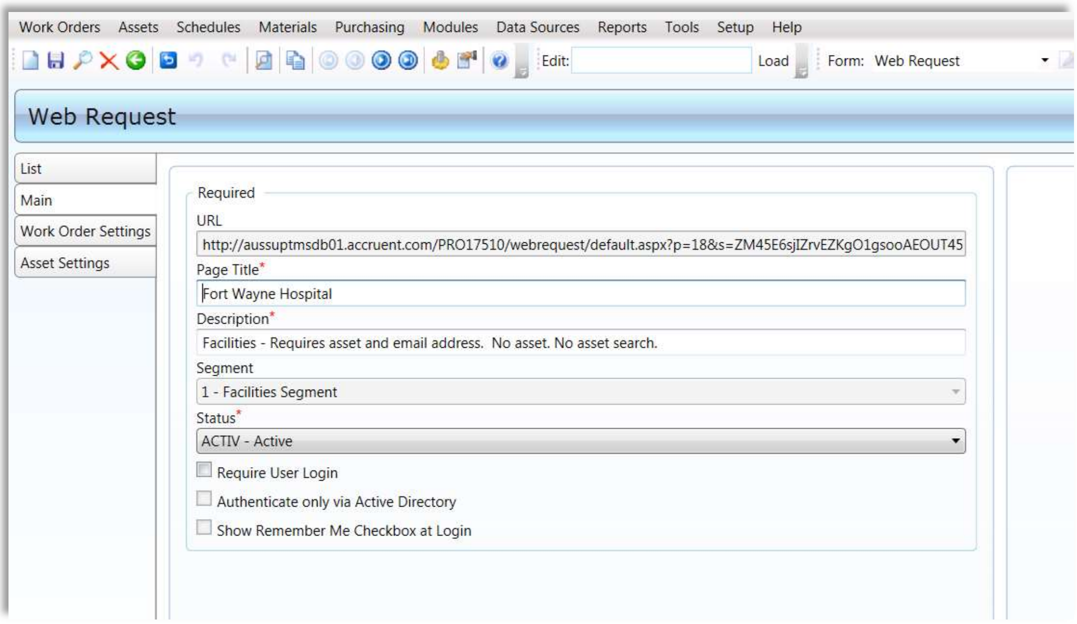




Web Request

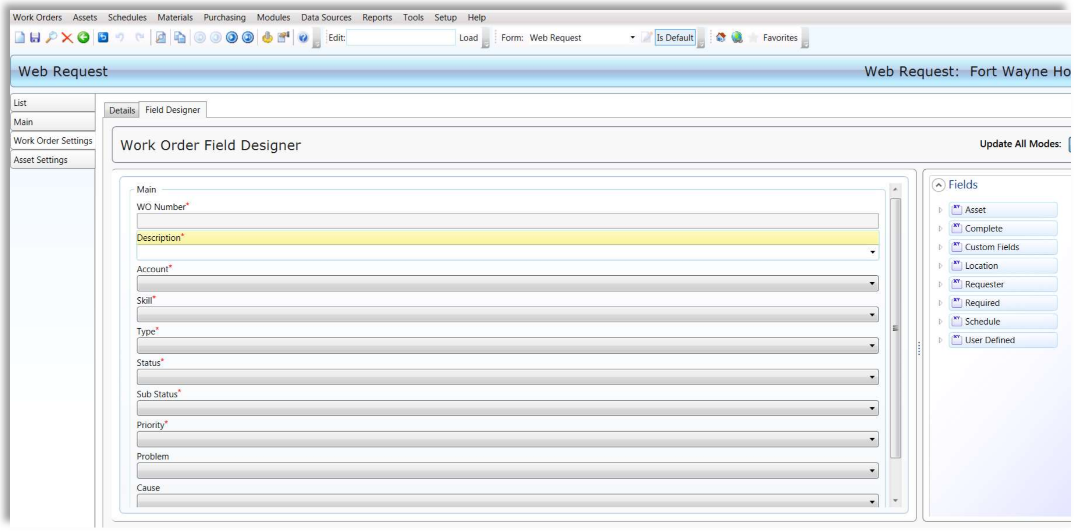
Web Requests enable people in your organization to submit unplanned Work Orders via an external URL.

Modules > Web Request > New/Query



When editing (or after creating a Web Request page) you can choose to have users log in before gaining access to the Web Request page, or leave it accessible to anyone with the URL.

After clicking the **Work Order Settings** tab, then the **Field Designer**, you are able to add, remove, hide, and move available fields to Query and Create work orders via the Web Request URL.



All the fields available for use can be found on the right hand side. You can choose to only edit New or Query by disabling “Update all modes” at the top right.

Please note that this area is one of the few times in TMS that you can right click fields. If you right click any field in the Web Request editor, you will open the field’s properties to further edit the functionality.

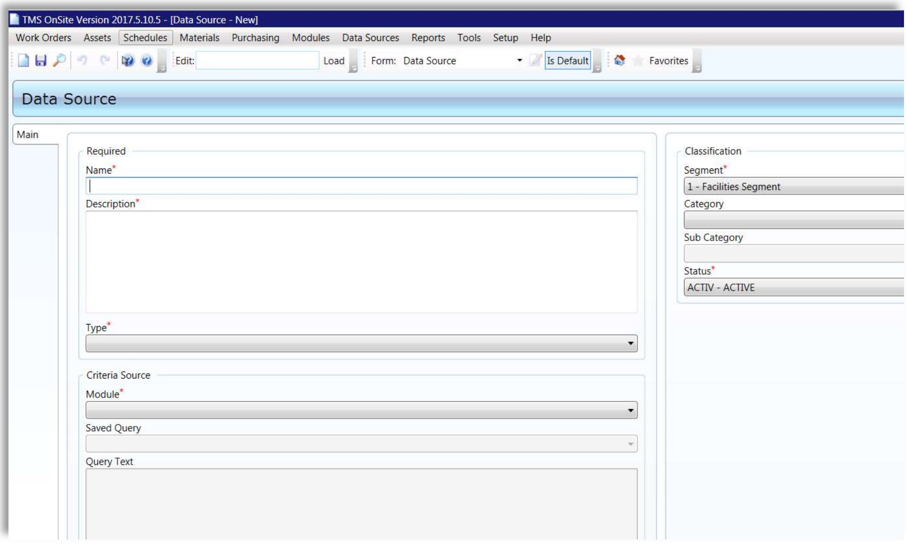
You can preview your Web request any time by clicking on the paper icon with the magnifying glass over it.

Always remember to save after making changes.

Data Sources

Data Sources contain information for retrieving a subset of data from the TMS database. Data Sources enable users to choose what fields are shown, and what criteria must be met for items to be listed. Data sources can be built for almost every module in TMS: Work Orders, Assets, Resources, etc. Data Sources can be exported via Excel, PDF, or added to a dashboard after creation. Data Sources are one of the deeper areas of TMS. For this reason, it is highly advisable to review our TMS Data Sources Guide for a more in-depth exploration of the functionality and breadth of the Data Sources module.

Data Sources > New



Dashboards

Dashboards enable quick viewing to Data Sources. Data Source items can be double clicked to open in a child window.

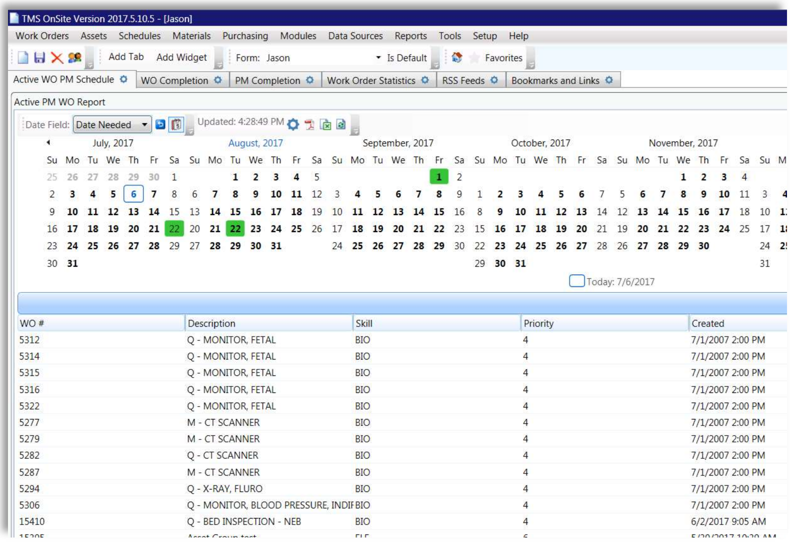
Different Dashboards can be opened by choosing the dashboard name in the Form field on the toolbar.

To add a tab, click **Add Tab** on the toolbar. To add a Data Source to the current tab, click **Add Widget**. You will then be prompted to choose the Type.

Multiple data sources can be added to a single tab. After more than one Data Source is added to a tab, you can click the **Gear Icon** on the tab to enable you to choose the formatting of the Data Sources. Data Sources can be dragged and dropped up/down or left/right to your desired location.

Please review our **TMS Dashboards Guide** for a more in depth explanation of all the additional Dashboard functionality.

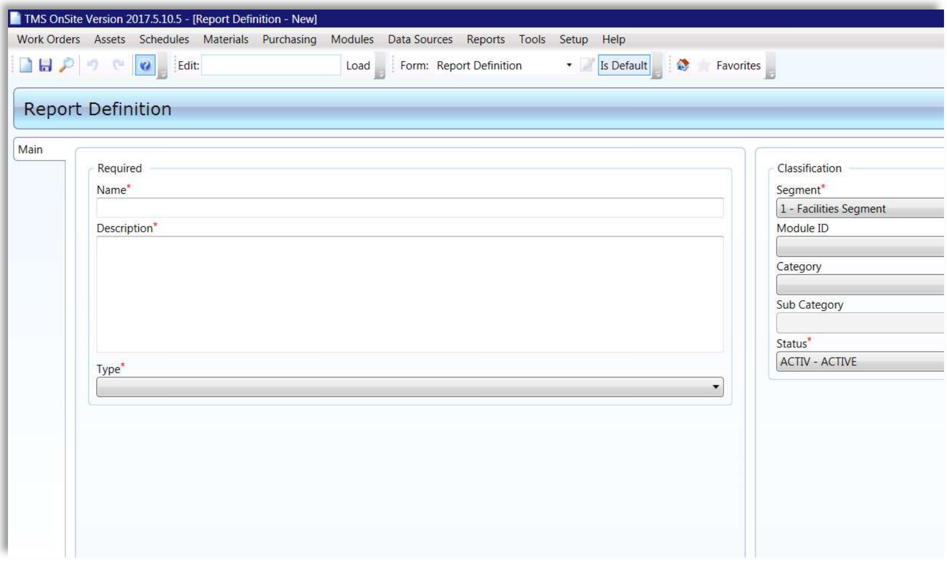
Modules > Dashboards



Reports

Reports in TMS are either Designer type or Standard type. Standard Reports are based on Data Sources within TMS. When creating a Standard Report, after saving the first screen a “Report Layout” tab will appear on the left hand side. This tab will enable you to move labels and fields around as desired. Reports can be exported as PDF or Excel files using the corresponding icons on the toolbar. Designer Reports are built then uploaded into the TMS system via the File Path field when creating the Report.

Reports > New

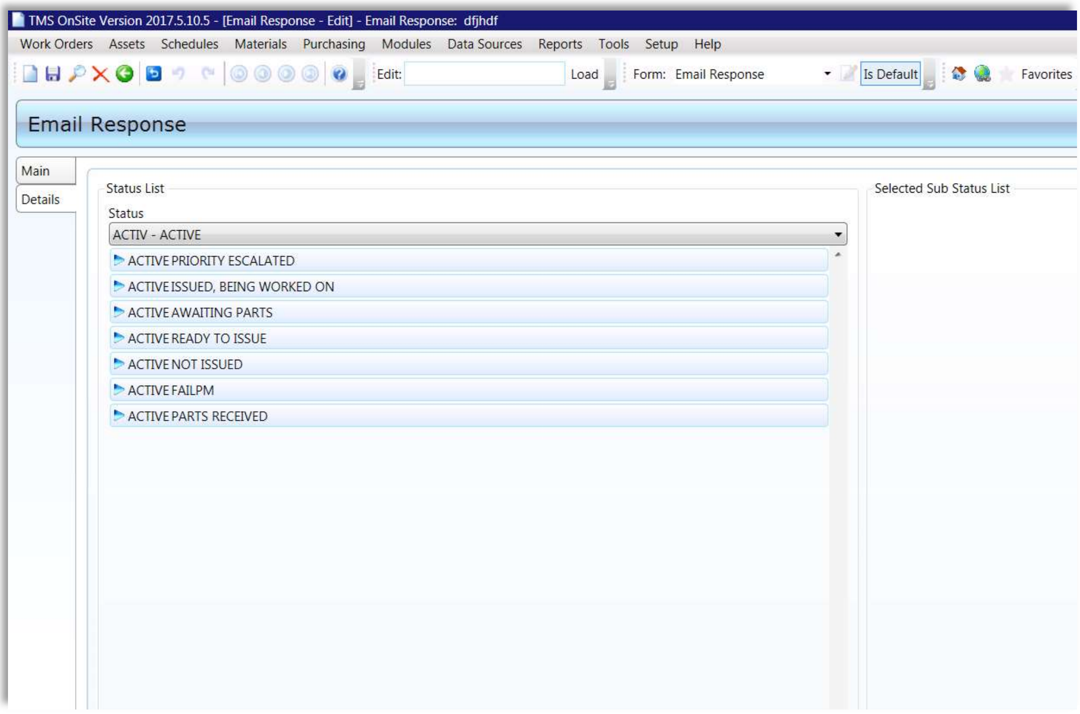


Email Response

Email Response enables the TMS System to automatically send out Work Order Status updates to the Requester of the Work Order. When creating the Email Response you will be prompted to choose a Data Source. The Data Source selected will serve as the formatting for the email that is sent. The “From” address does not need to be a valid email.

It can be a DONOTREPLY@organization.org for instance. After selecting the **SAVE** icon a “Details” tab will appear. The Details tab enables you to choose the Status/Sub-Status combinations that trigger the Email Response.

Modules > Email Response > New



Email Reports

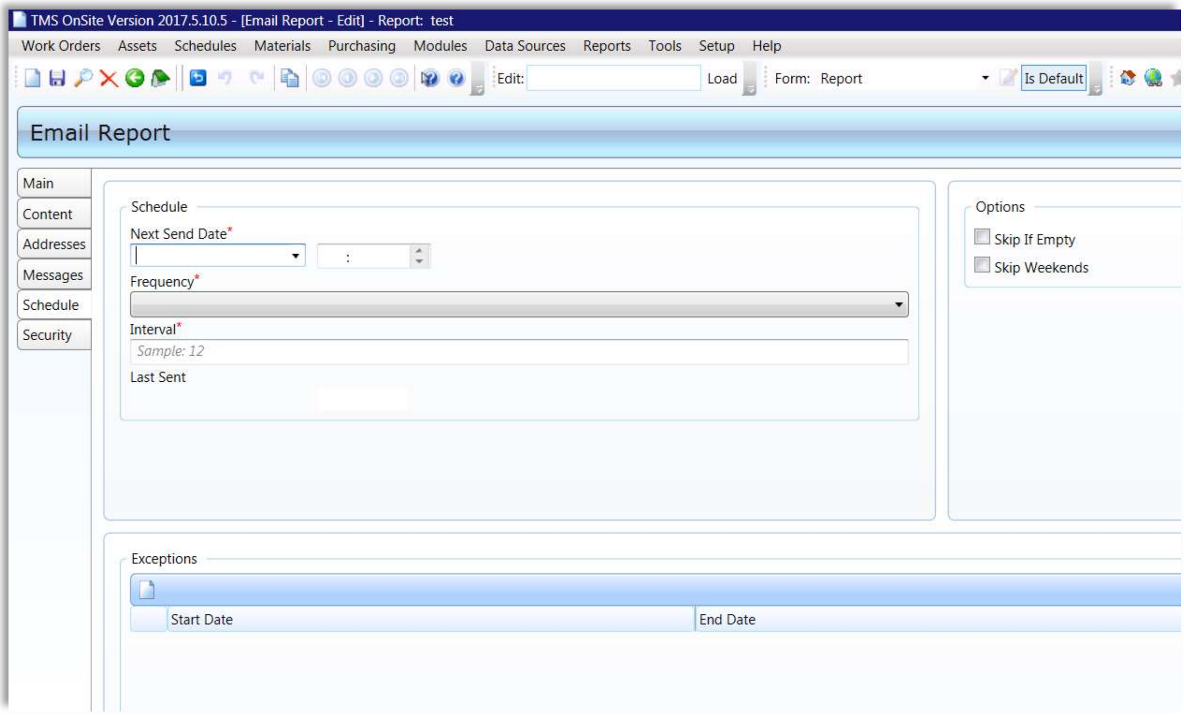
Email Reports enable users to have the TMS System automatically generate and email-out specified Reports to specified users at specified intervals. After you fill out the information on the first page and select **save**, other tabs will appear on the left hand side.

The Content tab will enable you to select the reports that will be sent.

The Addresses tab will enable you to choose the emails that the Email Report will be sent to. Please separate the emails with a semi-colon.

The Schedule tab will enable you to choose the interval that the report will generate on.

Reports > Email Reports > New



TMS ADMIN GUIDE - General TMS administrator guide

September 2025

Accruent, LLC
11501 Domain Dr,
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