



ADMIN GUIDE

How to Add New TMS Users

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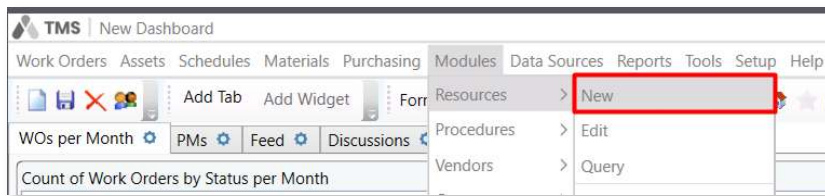
INSTRUCTIONS

Creating a New Resource

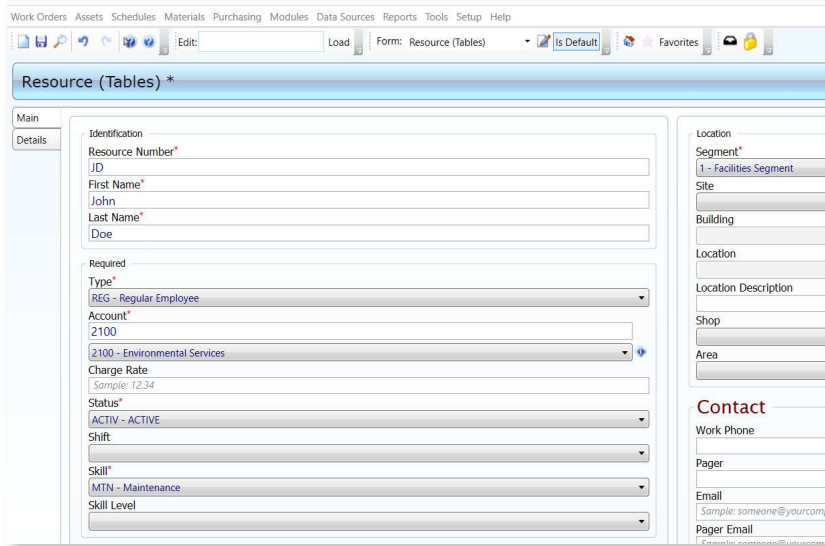
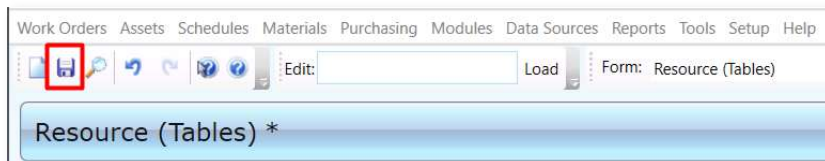
Note: Creating a new Resource is only necessary if the TMS user is to be assigned Work Orders and/or add Time Charges.

If this new user will simply use the application without being assigned Work Orders; without adding Time Charges, they do not need a Resource record. In this case, skip to the next step titled “**Creating a TMS User**”.

1. Go to *Modules > Resources > New*.



2. Fill out the required fields (marked with a red asterisk *), then hit Save.

A screenshot of the 'Resource (Tables) *' form in the TMS application. The form is divided into several sections: 'Identification', 'Required', 'Location', and 'Contact'. The 'Identification' section contains fields for 'Resource Number*' (filled with 'JD'), 'First Name*' (filled with 'John'), and 'Last Name*' (filled with 'Doe'). The 'Required' section contains dropdown menus for 'Type*' (selected 'REG - Regular Employee'), 'Account*' (filled with '2100'), 'Status*' (selected 'ACTIV - ACTIVE'), 'Skill*' (selected 'MTN - Maintenance'), and 'Skill Level'. The 'Location' section contains fields for 'Segment*' (selected '1 - Facilities Segment'), 'Site', 'Building', 'Location', 'Location Description', 'Shop', and 'Area'. The 'Contact' section contains fields for 'Work Phone', 'Pager', 'Email' (with a sample address), and 'Pager Email'. The form is titled 'Resource (Tables) *' at the top.

Optional - Adding a Pager

If the new technician is to receive page messages, you will need to set their Pager Email field to **1"10 digit number"@sms.sms**

This will send the exact same info as the current pager, but in a text message that contains a footer on how to disable incoming texts.

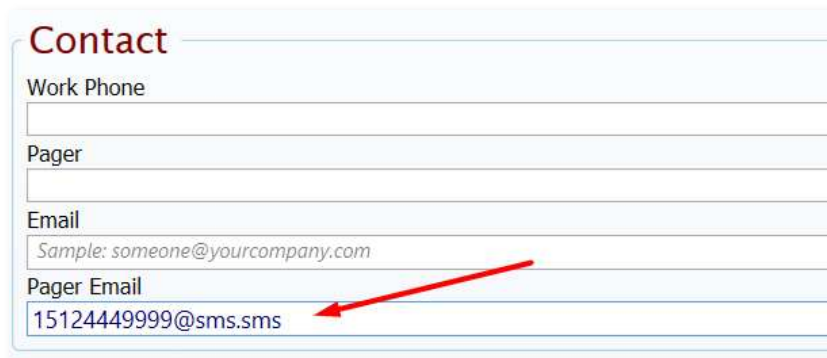
IMPORTANT NOTES:

Page messages will **only** be sent if the Pager Email value is exactly as follows: 1"10 digit number"@sms.sms (example: 14153339999@sms.sms).

We only support country code 1 (Canada/US) phone numbers.

So, to be specific, you need to enter the country code **1**, followed by a **10 digit number**, followed by **@sms.sms**

There should be no spaces, so 512-444-9999 becomes 15124449999@sms.sms



Contact

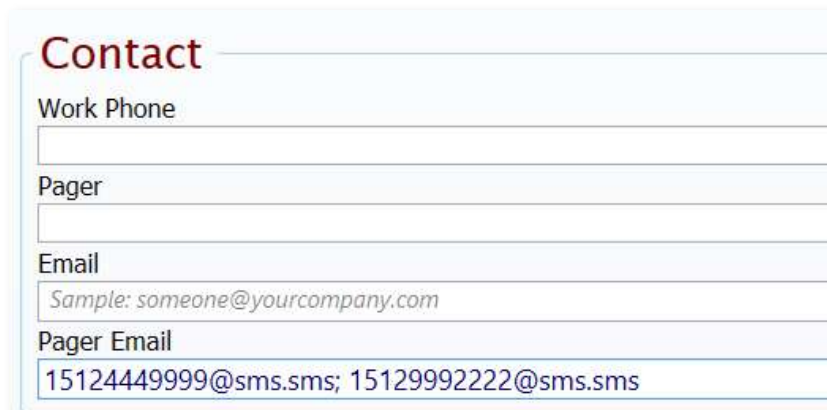
Work Phone

Pager

Email
Sample: someone@yourcompany.com

Pager Email
15124449999@sms.sms

Note: You can add multiple numbers separated by a semicolon “;”.



Contact

Work Phone

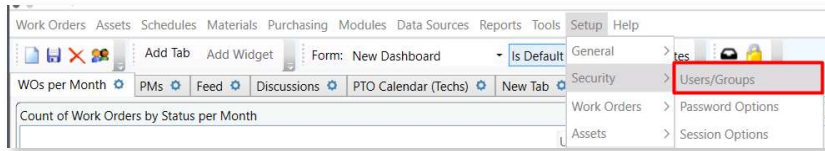
Pager

Email
Sample: someone@yourcompany.com

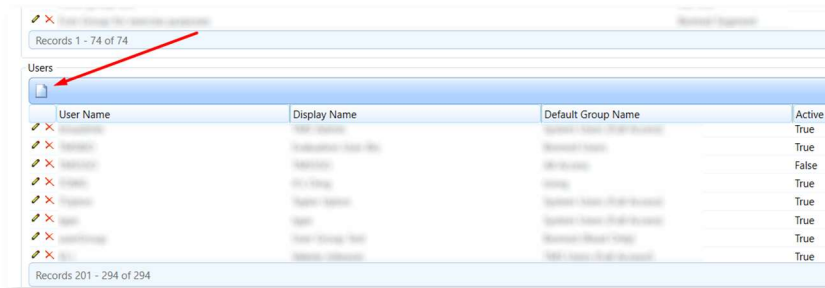
Pager Email
15124449999@sms.sms; 15129992222@sms.sms

Creating a New TMS User

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



2. Click the paper icon above the Users list.



*The User Setup window appears

3. Fill out the **required fields*** (colored red and marked with an asterisk).

User Name*: This will be used to log in to TMS.

Display Name*: The name of the new user.

Email Address*: A valid Email address, preferably one provided by your organization.

User Password*: A password containing at least:

- 6 characters;
- One uppercase letter (A, B, C);
- One lowercase letter (a, b, c);
- One numeric digit (1, 2, 3);
- One non-alpha-numeric symbol (!, @, #).

Re-Enter Password*: Confirm the password entered in the field above.

Default Group*: This dropdown will **NOT** populate unless you select a group from the **Groups** dropdown below first.

A screenshot of the 'User Setup' window in the TMS application. The window has two tabs: 'Main' and 'Resource and Details'. The 'Main' tab is active. The 'Required Information' section contains several fields: 'User Name*' (with 'JDoe' entered), 'Display Name*' (with 'John Doe' entered), 'Email Address*' (with 'john.doe@domain.com' entered), 'User Password*' (with masked characters), and 'Re-Enter Password*' (with masked characters). There is also a 'Default Group*' dropdown menu currently set to 'Facilities'. Below this is a 'Groups' section with a dropdown menu (indicated by a red arrow) and a list of groups including 'Facilities'. At the bottom of the window are 'Save', 'Cancel', and 'Another' buttons.

Note: If a Resource was created for this user, click the *Resource and Details* tab.

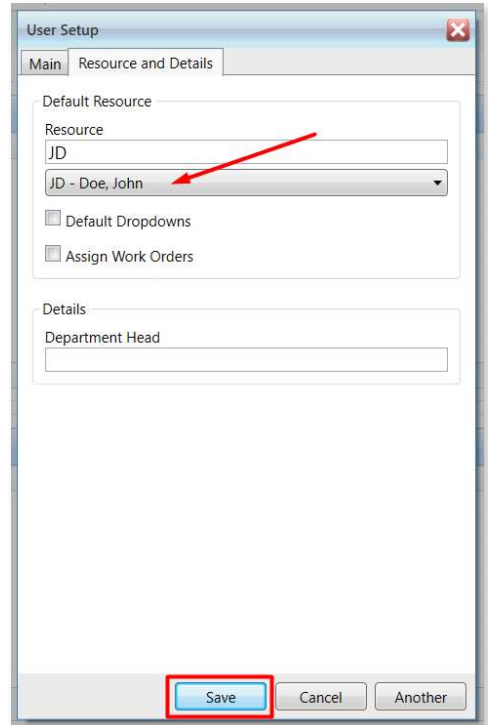
You can type in the Resource Number in the Resource field or look up the Resource in the dropdown menu.

There are two checkboxes below the Resource dropdown:

Default Dropdowns: If *checked*, it sets the Resource ID as the default Resource filled into resource-related fields, such as the Time Charge Resource Number on a new Work Order Time Charge.

Assign Work Orders: If *checked*, it automatically assigns Work Orders created or saved by the selected user to their Resource.

4. At the end, click Save.



The screenshot shows the 'User Setup' dialog box with the 'Resource and Details' tab selected. The 'Default Resource' section contains a 'Resource' field with 'JD' entered and a dropdown menu showing 'JD - Doe, John'. Below this are two checkboxes: 'Default Dropdowns' and 'Assign Work Orders', both of which are unchecked. The 'Details' section has a 'Department Head' field. At the bottom, the 'Save' button is highlighted with a red box, along with 'Cancel' and 'Another' buttons.

Info / Contact Support

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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>