RELEASE NOTES 5.26

December 21, 2021

Contents

Release information

Release Version: 5.26 December 2021

Introduction

This document describes the features and functionality of the TMS 5.26 release.

We invite you to submit your product enhancement requests on the TMS Ideas page. Ideas you post can be viewed by both Accruent employees and other TMS customers. On the Ideas page you can:

- Vote for or against an idea
- Add and respond to comments
- View the status of an idea

Your ideas help us understand what is important to our customers. Our Product Management team actively monitors the Ideas page and updates it when required. Contact Accruent Support if you have questions about the Ideas page.

5.26 Webinar Signup

Be sure to signup for our 5.26 Webinar coming soon!

See https://www.accruent.com/resources/webinars/tms-526-product-release for more details.

5.26 Release Overview

Request Portal (TMS Online)

The request portal is a new modern interface where your entire organization can access your Web Requests forms using most modern browsers on their desktop and mobile devices. Each Web Request created in TMS Core can become a tile in the Request Portal catalog so your end users can submit all their TMS requests in the same place with scalable webforms that look great on any device.

To access the Request Portal, TMS users and SSO-only users navigate to a single URL and login with either SSO or native TMS credentials. Admins can enable their existing Web Request forms in their new Portal and have the same form-level customizations as Classic Web Request forms.

Your end users can access your sites portal at *yourcustomername.tmsonline.com/requestportal*/

To get started, signup for our upcoming 5.26 webinar, or contact support for a detailed guide.

[Request Portal Release Notes DRAFT - Product - TMS - Confluence (atlassian.net)](#)

Note on Modern Request Forms Created Since 5.25

Existing Modern Form URL's are being retired, their older URLs may not work moving forward, those same forms can be marked 'show in portal' inside Web Request>Edit>settings, and can now be found at new Request Portal URL *customername.tmsonline.com/requestportal*

Filtering Codes by WO Type or Skill (Onsite and Online)

Admin users can associate completion codes (Problem/Cause/Action Code) with WO-TYPE or WO-SKILL codes. Admins can now filter completion code choices across many areas of TMS by linking the two dropdowns.

After associating completion codes with a Type and or Skill, admins then choose within a Segment whether to filter codes by Type or Skill under Work Orders > Options.

By default, completion codes will be set to no filtering, and appear on all WO forms, and behave the same as prior to 5.26.

To get started, signup for our upcoming 5.26 webinar, or contact support for a detailed guide.

[Request Portal Help Center DRAFT - Product - TMS - Confluence (atlassian.net)](#)

PM Date Update Wizard is now Schedule Date Update Wizard (Onsite and Online)

The PM Date Update Wizard is now enhanced and renamed the Schedule Date Update Wizard Improvements include...

- Users can now access saved queries when accessing the query form to select which records to update
- The Schedule selection screen has been improved
- Users can now select from both PM's and IN and PE records when selecting which due dates to update

- Frequency factor is no longer a required field, so users can choose a Frequency Factor to filter results OR users can skip frequency factor and select schedules of varying frequency factors from the results grid

Users can now update up to 2,000 records at a time for larger customers, prior wizards hit 800 row limits

Performance Improvements and Application Enhancements

JIRA / IID	Component	Summary
TMSPROV-12786	TMS Core	**Enhance Setup>WO's>Codes List Grid with 'Related Records' Col** New columns for 'Related WO-Type' and 'Related WO-Skill' were added in the Code Editor area of TMS. Note: • IF a user links a code to a WO-Type or WO-Skill, that value is shown in the grid • If no link exists, then the column will be blank.
TMSPROV-12726	TMS Core	**Icon Crop Tool on Request-Portal Setup Form** Users can upload Icons for Request Portal tiles. The icon upload utility ensures only supported file types are allowed including .jpg, .png, .bmp, .gif, .jpeg, .ico file types. The icon upload utility also allows users to easily crop and confirm a 1x1 ratio so icons look their best in the Request Portal. Contact support@accruent.com or check the links in your release notes email for how to download a professional icon pack courtesy of Accruent.
TMSPROV-12718	Request Portal	**Enforce Unique Activity Name in Request-Portal Setup Form (UI/UX Work)** The setup form, upon save, TMS ensures 'Activity Tile Name' field is unique per segment (users can create similar names for different segments, but the Tile Name field must be unique within the segment).
TMSPROV-12712	PM	**Rename The Wizard from PM to Schedules** This development renamed the Wizard from PM Date Update to Schedule Date Update.
TMSPROV-12711	PM	**Update Viewer to Show Inspection PE/PM Forms** This development added Logic to filter & Update Viewer to Show Inspection PE/PM forms.

JIRA / IID	Component	Summary
TMSPROV-12710	PM	**Bring Saved Queries to Asset Query Form** This development made the Saved Queries button available within the PM Date Update wizard during the query under Data Maintenance tools.
TMSPROV-12664	Request Portal	**Segment Dropdown Persists for Each User's Login** As a user logging into the Request portal on a specific device (a single desktop, a single phone, etc.), my last choice for 'Segment' dropdown on the catalog tile view will persists for future logins, as long as I'm logging in on the same device. It also will persist • if I navigate back to the catalog tile view from the 'Create WO' form, say after I click the 'Return to Catalog' option • If I click the home button in the top left of the portal header from any page, and return to the catalog tile view • If I change my Segment dropdown choice a second or third time, my 'remembered choice' is updated to my latest choice.
TMSPROV-12663	Request Portal	**New 'Created by' Field for all Portal Forms** This development provides a totally separate field from 'requester' contact info fields on forms today. This field is automatically populated using a user identifier from your authentication source (SSO or TMS user name). So that regardless of request contact info used, TMS users know which username created a request in the Request Portal.
TMSPROV-12636	Request Portal	**Rename 'Get From AD' Checkbox on WR Field Designer** For clarity, in this version forward the 'Get FROM AD' control is now renamed 'Auto Insert Current User Details' inside the Web Request > Edit screen of a Request Form> Field Designer > right clicks Properties on requester field. What this field does

JIRA / IID	Component	Summary
		IF admin marks this control = CHECKED **THEN** the form will auto insert contact info for the logged in user into tcontact info related fields on the form including Name, Email, Phone. NOT CHECKED leaves the request field blank upon loading form, which is pelpful for portal forms being used by call center users.
TMSPROV-12609	Request Portal	**Allow Request Portal WO Forms to Filter Completion Codes** As an end User submitting a Request Portal form, after the WO-Type or WO-Skill field has been selected, the UI now filters dropdown choices according to settings chosen by my admins. If a user in the portal changes the WO Type or Skill code, the associated fields are reset. The available for the Problem, Cause, and Action code filtering is driven by two major admin settings.... - the segment-settings defined under Setup > Work Order > Options > 'Filter by Completion Codes' including.... - No filtering - Filter by WO-Type - Filter by WO-Skill - the relationship defined on the completion code itself under Setup > General > Codes > Code Setup, including 'Filer by WO-Type' - Either blank, aka all WO-Types - no filtering at all, code is visible regardless of Type or Skill selected - Specific WO-TypeABC 'Filer by WO-Skill' - Either blank, aka all WO-Skills - no filtering at all, code is visible regardless of Type or Skill selected

JIRA / IID	Component	Summary
		▪ Specific WO-SkillABC

TMSPROV-12607	TMS Core / Work Order	**Update TMS Core WO Forms**
		
		As an end User, editing a WO-form across multiple TMS Core modules including
		
		• TMS Core > WO's
		• TMS Core > Dispatch
		• Quick Close
		
		After the WO-form already has a WO-Type or WO-Skill field selected, the UI/form will filter the dropdown choices available for the Problem, Cause, and Action code according to Admin users settings within the segment and codes.
		
		Specifically:
		
		• Setup > Work Order > Options menu > 'Filter Completion codes by'
		    ○ Which group or segment form the user belongs to
		    ○ Whether that segment or group is set to filter codes by WO-Skill OR WO-Type
		• Which codes have these settings in their setup, either
		    ○ No filtering (these codes are never filtered and appear everywhere)
		    ○ Filter by a certain WO-Type
		    ○ Filter by a certain WO-Skill

TMSPROV-12605	TMS Core	**Update Work Order Options Screen** An Admin in Setup > Work Order > Options menu can define whether the WO Forms will filter the Completion Codes dropdown choices shown by either WO-Type or WO-Skill, or 'Show All' for no filtering which will be the default choice for any new codes. • No Filtering - Show All = Definition: Show all available codes for that segment • Filter by Type = Show all available codes for that segment with Type = The Work Ordrer's Type OR Type = 0

JIRA / IID	Component	Summary
		• Filter by Skill = Show all available codes for that segment with Skill = The Work Ordrer's Skill OR Skill = 0 Fully configuring the feature requires two steps. First associate the completion codes (Problem/Cause/Action Code) with either a WO-TYPE and or WO-SKILL codes in the Code Setup form (see TMSPROV-12604). Then define whether WO's forms in that segment should filter by TYPE or SKILL.
TMSPROV-12604	TMS Core	**Update Completion Code Edit Screen** Admins can now associate completion codes (Problem/Cause/Action Code) with either a WO-TYPE or WO-SKILL code in the Code Setup form. On the Code Setup form, admins can now associate a code with both TYPE and SKILL, and specify in Segment options whether to filter by Type or Skill.
TMSPROV-12590	Request Portal	**Post WO-Save Pop Out and Attachments** After submitting, if the save is successful, a 'Record Saved' modal window displays where users can attach up to five images or files from their device.
TMSPROV-12589	Request Portal	**Create Form - Asset Lookup Field** If a Request Portal form and Asset records are configured properly, when an end user taps an Asset from a list of Asset Numbers, or types an Asset Number into the Asset Number field and tabs off, then the Request Portal form auto completes any of fields below from the Asset record chosen. • Asset Description • Manufacturer • Model • SIte/Bld/Loc/Shop Fields o Site

     o   building

     o   location / location description

     o   Shop

- Account Code / Account Description

- Skill (1)

- Priority (1)

     o   (1) these are not required fields on every asset, but if defined on the Asset the Request form can auto complete these as well

JIRA / IID	Component	Summary
TMSPROV-12588	Request Portal	**Create Form | Requester-Lookup and Auto Complete** The Requester name field can be used as a free text field or as a search & autosuggest style field depending on the settings for 'WO Requester Source' for the Segment. IF setup as a dropdown, the field will pull a list of user names from either Resources table or Requesters table in TMS. Users completing the form can click on an existing username in the results list, and the Requester field inserts the user's name and any other related fields on the form including: **IF WO Requester Source for Segment = Resources** Requester Name Account Email, Phone Site/Building/Location/Shop IF WO Requester Source for Segment = Requesters Requester Name Account Email, Phone Site/Building/Location/ **What happens IF WO Requester Source for Segment = Active Directory?** Note the new request portal does not support AD related features. If the segment is set to 'AD', then the Portal's

		Requester dropdowns for that segment will default to 'Requesters' source.
		Admins control the source setting PER SEGMENT that the form is created within, or per User Group for the currently logged in TMS user.
		What happens if Asset Number field has already populated Site Building Location fields, and then the user selects a Requester name with conflicting Site Building Location info?
		The Asset Number lookup field receives the priority for auto-filling SBL fields, meaning the Requester dropdown can only auto-insert SBL if an Asset Number has not already auto-inserted SBL. If SBL were already auto-inserted from Asset Number, choosing a Requester does not update these fields even if the Requester is associated with different SBL info.
TMSPROV-12494	Request Portal	**Modern Request Forms Created Since 5.25** Existing Modern Form URL's are being retired, their older URLs should not work moving forward, those same forms can be marked 'show in portal' inside settings, and can now be found at new Request Portal URL customername.tmsonline.com/requestportal

TMSPROV-12492	Request Portal	**Request-Portal Setup Form**
		
		 Admins creating or modifying Request forms will see new Request Portal specific options under Modules > Web Request > New / Edit
		
		 Including…
		
		 • **Portal Visibility** - Choose the visibility within the portal for each Request-Activity with choices such as
		
		      o Show / Hide in Portal
		
		      o Show / Hide in Portal **Per Login**
		
		          ▪ Visible for All Logins (Default choice)
		
		          ▪ Restrict Visibility to TMS Users Only

JIRA / IID	Component	Summary

		▪ Will restrict the Tile inside the portal to only be visible to users who logged in with TMS credentials, or have a TMS-User-ID associated with their SSO credentials
		
		• **Choose Tile-Icon** -Add or Replace a Tile-Icon which will populate the grid and show a preview on the form, for more see https://accruent.atlassian.net/browse/TMSPROV-12484
		
		    o Icon packs will be shared via URL with same announcement emails that Accruent uses to sends release notes to customers
		
		    o Or contact your admin or support@accruent.com if you need to request these icon files and cannot locate the email
		
		Modern Request Forms Created Since 5.25
		
		Existing Modern Form URL's are being retired, their older URLs will not work moving forward, those same forms can be marked 'show in portal' inside settings, and can now be found at new Request Portal URL customername.tmsonline.com/requestportal

TMSPROV-12489	Request Portal	In order to show a Tile in the portal, admins should modify a Web Request with the following settings: • Under Modules > Web Request > Edit > Main tab, show or hide in portal is marked SHOW • Under Modules > Web Request > Edit > WO Details tab > 'Work Order Create' is CHECKED • Both of these conditions must be met for a tile to show in the portal If a segment has more tiles than can be shown on their screen at one time, users can click 'show more' to expand and see more request tiles.

JIRA / IID	Component	Summary
TMSPROV-13026	Request Portal	A new field called RequestCreator(UI)/RequestCreator(DB) was added in 5.26 to clearly document the TMS and non-TMS users who create requests via the Request Portal.
TMSPROV-8128	TMS API Improvements	**API 'FILE-Upload' Feature - (WO's, Assets, Procedures)** TMS API partners can attach files to Work Order, Assets, and Procedure records inside TMS with the existing SOAP API.

Issue Maintenance

The following customer reported issues have been fixed.

JIRA / IID	Summary
TMSPROV-12965	**WO# value on Save modal is incorrect** The modal popup that is displayed after you successfully submit a web request displays the actual work order number, rather than the work order ID.
TMSPROV-12452	**API URL Upload Service does not validate User Permissions for Work Orders module** This release improved the permission enforcement for the new URL/Doc upload feature in DocumentUploadWS.asmx web service.
TMSPROV-12319	**Fix Bookmark, RSS Widgets UI Settings** This ticket is split from original work fixing this issue for certain widget types, this ticket to apply similar fixes to remaining widgets. Split using details on TMSPROV-12213.
TMSPROV-12746	For customers with large number of TMS customers (30k+), the username search box, and related results viewer grid now filter rows as expected after a user opens and closes a specific user record in a pop out window. In 5.25, closing a pop out window caused the results grid to stop updating whenever the text in the search box was modified.
TMSPROV-12735	**Manual printing behavior** If "Show Report Preview on Quick Print," **is UNchecked** under "Setup > General > Options," **then** clicking the Print icon on the toolbar will open a the windows system printer dialog window, - this **should** take you directly to a print dialogue (if you have any printers installed on your workstation) - However, as of 5.25 this is not happening. 5.26 restored this behavior, if 'show report' is UNchecked, clicking the Print icon now opens the system print dialog successfully

JIRA / IID	Summary
TMSPROV-12600	**Can't attach file to Model Module** 5.25 introduced a bug that blocked documents from being attached to Vendor Models. Documents can now be attached to vendor models again in this release.
TMSPROV-12379	A small change was made to the server side of Sidekick's sync configuration to improve performance in companies with large number of Assets and components. Previously a sync could disrupt TMS Core's availability.
TMSPROV-12293	**Saving Schedule after Completing Work Order for Schedule from WO History tab Causes Missed Updates** In this version forward, when you complete a Schedule Work Order and click back to the Schedule record and hit save, then certain Schedule fields (Last Completed Date, Next Due Date) will remain updated as expected. Previously clicking save on the schedule could override the updated fields from the completed WO. Previously when opening a work order in a child window from a Schedule and completing the work order, saving the schedule would override some of the fields incorrectly.
TMSPROV-11932	**PM Schedule Module Caches Incorrect Custom Fields** When TMS introduced Inspections, it made certain custom fields appear hidden for older TMS customers. In this version forward, those fields are now visible as expected. TMS is able to gather custom fields for the PM Schedules "Module" which includes IDSections 8, 9 and 81.
TMSPROV-11931	**WO > Purchasing tab Crashes Depending on User-Groups** Users belonging to any group can click the Purchasing tab of a work order and successfully arrive on the Purchasing tab without the application crashing, so that they can review respective purchase orders. Previously TMS would crash for certain user groups.
TMSPROV-9315	**Transferring Assets Causes Incorrect WO Info in UI** When transferring an asset from one segment to another, TMS Work Order forms in the UI will now successfully display Asset details for the transferred asset. The work order history on the

JIRA / IID	Summary
	asset record will display the appropriate asset information, on-screen, regardless of the new Asset number used during the transfer. In prior versions, work orders associated to transferred assets would display incorrect asset information on-screen, but present correct information when printed.
TMSPROV-6740	**TMS Fails to Recognize Changed Event on Some Text-Fields** Previously when users modified values in certain fields on a TMS form, TMS would not recognize the changed a value when the user clicked save if the user left the cursor in the field. TMS now recognizes and saves changed values for all text fields as expected.

TMS Release Notes – September 2021

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