



# RELEASE NOTES 5.28

November 2, 2022

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# Release Information

Release Version: 5.28 November 2022

## Introduction

This document describes the features and functionality of the TMS 5.28 release.

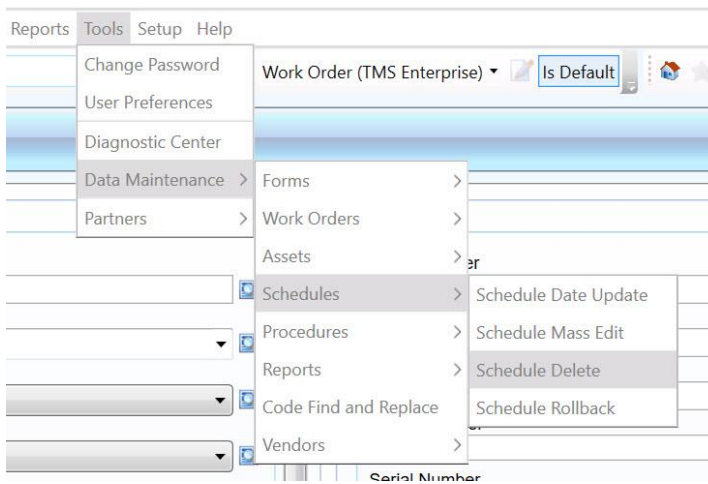
We invite you to submit your product enhancement requests on the TMS [Ideas](#) page. Ideas you post can be viewed by both Accruent employees and other TMS customers. On the Ideas page you can:

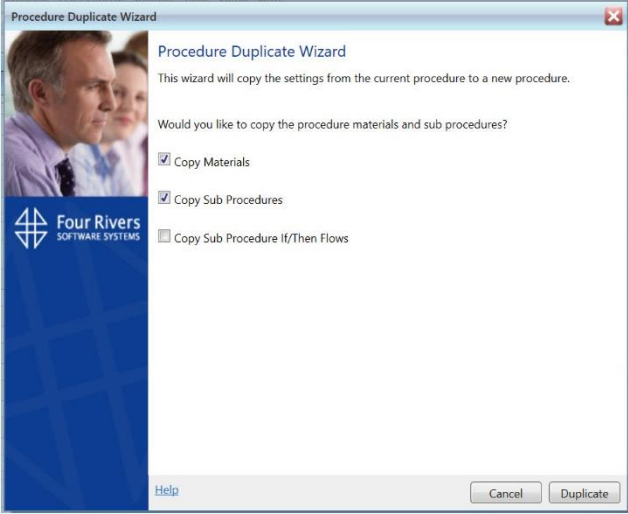
- Vote for or against an idea
- Add and respond to comments
- View the status of an idea

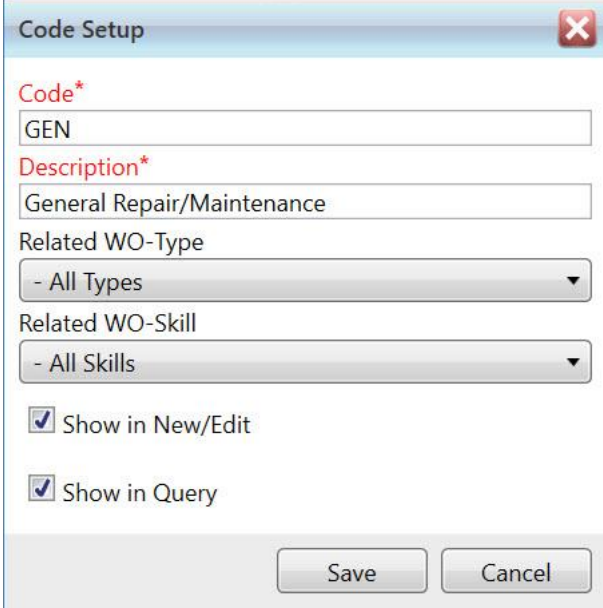
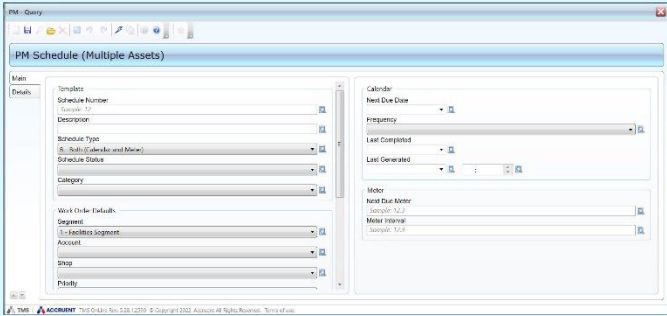
Your ideas help us understand what is important to our customers. Our Product Management team actively monitors the Ideas page and updates it when required. Contact Accruent Support if you have questions about the Ideas page.

## Release Enhancements

The following customer reported issues have been fixed.

JIRA / IID	Component	Summary
TMSPROV-1984	Inspections	<p>The <b>PM Delete</b> tool for mass deletion of <b>PM Schedules</b> only worked on <b>PM Schedules</b>. Customers may create <b>PE</b> and <b>INSPECTION (IN)</b> schedules accidentally and want to delete them as well. There was no way to do so.</p> <p>We updated the <b>PM Delete</b> tool to be a <b>Schedule Delete</b> tool and added support for <b>PE</b> and <b>INSPECTION (IN)</b> schedules. All labels that said <b>PM</b> have changed to <b>Schedule</b>.</p> 

JIRA / IID	Component	Summary
<p>TMSPROV-12178</p>	<p>Wizard</p>	<p><i>Screenshot: <b>PM Delete</b> tool now a <b>Schedule Delete</b> tool.</i></p> <p>When using the <b>Procedure Duplicate Wizard</b> to make an exact copy of a Procedure, TMS failed to copy <b>the Sub-Procedure If/Then Flows</b>.</p> <p>We added an option to the <b>Procedure Duplicate Wizard</b> that provides the user with the ability to copy <b>Sub-Procedure If/Then Flows</b>.</p>  <p><i>Screenshot: ability to copy <b>Sub-Procedure If/Then Flows</b>.</i></p>
<p>TMSPROV-12909</p>	<p>TMS Core</p>	<p>When the Work Order Option <b>Filter Completion Codes by</b> is set to <b>Filter by WO-Type</b> or <b>Filter by WO-Skill</b> and an administrator is configuring <b>Work Order Problem, Cause, or Action Codes</b>, the <b>Related WO-Type</b> and <b>Related WO-Skill</b> fields both contain a value labeled - <b>All Types</b>. This value was previously represented by a blank row in the drop-down.</p> <p>The functionality of the value has not changed; it still represents all available types and skills. We added the label to clarify.</p>

JIRA / IID	Component	Summary
		 <p><i>Screenshot: - All Types label added.</i></p>
TMSPROV-14509	Mass Edit	<p>The forms used in the <b>Schedule Mass Edit</b> tool have required fields in the <b>Calendar</b> and <b>Meter</b> sections. This forced an update to <b>PM Schedules</b> in batches</p> <p>We removed all field requirements for the <b>Calendar</b> and <b>Meter</b> sections of the <b>Schedule Mass Edit</b> tool on all forms (including custom forms 1).</p>  <p><i>Screenshot: Schedule with field requirements for <b>Calendar</b> and <b>Meter</b> sections removed.</i></p>

## Issue Maintenance

The following customer reported issues have been fixed.

JIRA / IID	Component	Summary
TMSPROV-9962	TMS Core	When using the rollback utility on a schedule with both a calendar and schedule type, the <b>Next Due Date</b> rolled back but the <b>Next Due Meter</b> did not. Now, when using the <b>PM Generation Rollback tool (Tools &gt; Data Maintenance &gt; Schedules &gt; Schedule Rollback)</b> , the process will roll back (revert) both calendar and meter contents to their pre-generation values.
TMSPROV-12099	Security	User can no longer delete reports that they have Read-Only access to.
TMSPROV-12383	Work Order	When using a <b>Custom Work Order</b> form that has the <b>Assignments</b> drop-down field included in <b>Create</b> mode, Unavailable Resources are now omitted from the list of Resources. Attempting to assign an Unavailable Resource will result in a <b>Code not found</b> message.
TMSPROV-12830	Security	<p>To improve security, we made some changes to the login process for native TMS users (this does not affect SSO logins).</p> <p>If you check the box labeled <b>Remember Me</b> when you log in to TMS, and you later close the tab or browser window without explicitly logging out, TMS will remember both the <b>Username</b> and <b>Password</b> values and log you in automatically the next time you access the site. <b>Username</b> and <b>Password</b> values are encrypted.</p> <p>If you check the box labeled <b>Remember Me</b> when you log in to TMS, and you later explicitly log out of TMS, neither the <b>Username</b> nor <b>Password</b> value is remembered the next time you access the site. You will need to re-enter both values.</p> <p>If the <b>Remember Me</b> box is not checked, TMS never remembers the <b>Username</b> or <b>Password</b> values.</p>
TMSPROV-13269	TMS Core	We have enhanced the <b>Completion Code</b> filtering functionality so that previously defined <b>Problem, Cause,</b>

JIRA / IID	Component	Summary
		<p>and <b>Action</b> codes on Work Orders are only reset when necessary.</p> <p>If <b>Filter Completion Codes By</b> is set to <b>Show All - No Filtering</b> under <b>Setup\General\Codes</b> for the Work Orders module, the feature is essentially disabled; no filtering takes place, and no resetting to blank values occurs.</p> <p>If <b>Filter Completion Codes By</b> is set to <b>Filter by WO-Skill</b>, then any previously defined <b>Problem, Cause, Item,</b> and <b>Action</b> codes on a Work Order will reset to blank values if the user subsequently changes the <b>Skill</b> value.</p> <p>If <b>Filter Completion Codes By</b> is set to <b>Filter by WO-Type</b>, then any previously defined <b>Problem, Cause, Item,</b> and <b>Action</b> codes on a Work Order will reset to blank values if the user subsequently changes the <b>Type</b> value.</p>
TMSPROV-13270	Purchasing	Using the <b>Generate PO/Req - Item</b> or <b>Generate PO/Req - All</b> button on the <b>Materials</b> tab of a Work Order that has Material Issues without a <b>Vendor</b> and/or <b>Catalog</b> defined now displays an error. Previously, TMS would appear to stall and would not complete the process.
TMSPROV-13558	Request Portal	Dedicated Hosted TMS sites ( <b>OnSite/Hosted</b> configuration) can now log in to the <b>Request Portal</b> with native TMS credentials.
TMSPROV-13752	Request Portal	Request Portal session timeout was not redirecting users back to the login screen.
TMSPROV-13828	Procedures	When doing the If/Then sub procedure readings on a worksheet, the formatting added gaps when sub procedures were not shown.
TMSPROV-14303	SSO	If you are using SSO Login to access a Web Request form, you can now access other Web Request forms in different tabs within the same browser window without error, and without re-authenticating.



JIRA / IID	Component	Summary
TMSPROV-14306	Assets Module	<p>It is expected that any two assets can be merged using the <b>Asset Schedule Merge tool (Tools &gt; Data Maintenance &gt; Assets &gt; Asset Schedule Merge)</b>.</p> <p>Assets associated with <b>IN</b> schedules produced an error message when using the tool.</p>
TMSPROV-14360	TMS Core	<p>For custom fields of control type <b>Calendar and Time</b>, selecting the magnifying glass icon for <b>Advanced Query</b> for the time component, TMS logged out with an error. Now, the magnifying glass icon for <b>Advanced Query</b> opens a child window allowing you to input criteria.</p>
TMSPROV-14361	Request Portal	<p>Submitting a work order in <b>Request Portal</b> with a drop-down selector custom field on the page caused an error. Now, you can use the <b>Request Portal</b> to submit work orders with drop-down selector custom fields.</p>
TMSPROV-12923	TMS Core	<p>To improve system security, we have made a change to the embedded System user.</p> <p>The ability to manage the System user password has been disabled for TMS OnLine clients.</p> <p>For clients that utilize the OnSite/Hosted version of TMS (the database is configured as OnSite, but it is hosted on Accruent servers), you will no longer be able to change the password for the embedded System user; this must now be changed via database script.</p>
TMSPROV-13038	Request Portal	<p>We added the <b>Activity Tile Name</b> field to the <b>Web Request Duplicate Wizard</b> to be able to use it on a <b>Web Request</b> that is configured to appear in the new <b>Request Portal</b>.</p> <p>The Web Request Duplicate function that is used to create copies of Web Request forms can now be used to duplicate <b>Request Portal Web Request Forms</b>. To facilitate this change, we added an optional field labeled <b>What would you like the new Activity Tile name to be?</b> on the <b>Web Request Duplicate wizard</b>.</p> <p>Note: <b>Activity Tile</b> names must be unique within the same Segment.</p>
TMSPROV-13202	TMS Core	<p>When the Work Order Option <b>Filter Completion Codes by</b> is set to <b>Filter by WO-Type</b>, and an administrator is</p>

JIRA / IID	Component	Summary
		configuring <b>Work Order Problem, Cause, or Action Codes</b> , the <b>Related WO-Type</b> drop-down now contains the <b>Work Order Type Codes</b> that are in the System Segment ( <b>IN-Inspection, PE-Planned Event, and PM-Preventive Maintenance</b> ).
TMSPROV-14164	Request Portal	We updated the dialog that is displayed after successful submission of a request in the <b>Request Portal</b> . It now enables you to add multiple attachments and displays the <b>Name</b> and <b>Description</b> values in a grid.
TMSPROV-14173	TMS Core	<p>When you turn on the General Option labeled <b>Show Vendor Model Numbers</b>, TMS automatically turns on the <b>Enable Manufacturer</b> validation setting and shows it as read-only, since this is required to support the first setting. However, after you save changes and then reload the page, <b>Enable Manufacturer</b> validation is no longer read-only. This had the potential to cause data integrity issues.</p> <p>Now, if <b>Show Vendor Model Numbers</b> is enabled, then <b>Enable Manufacturer</b> validation is enabled and read-only. The only way to turn off <b>Show Vendor Model Numbers</b> is to turn off <b>Enable Manufacturer</b> validation first.</p> <p>If <b>Enable Manufacturer</b> validation is off, you may turn <b>Show Vendor Model Numbers</b> on or off as you wish.</p>

## TMS Release Notes – November 2022

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