



RELEASE NOTES 5.29

March 21, 2023

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Release Information

Release Version: 5.29 March 2023

Introduction

This document describes the features and functionality of the TMS 5.29 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.

Prior to using the most recent version of TMS, we recommend that you follow these steps to clear your cache.

For any version of Windows:

1. Close all open instances of IE and EDGE
2. Select Windows Start, and type "Run", and select Run app
3. Enter the following: %temp%\..\apps
4. Click "OK"
5. A new window opens, delete the 2.0 File in this window
6. Log into TMS as usual.

Release Enhancements

Schedule Compliance Date

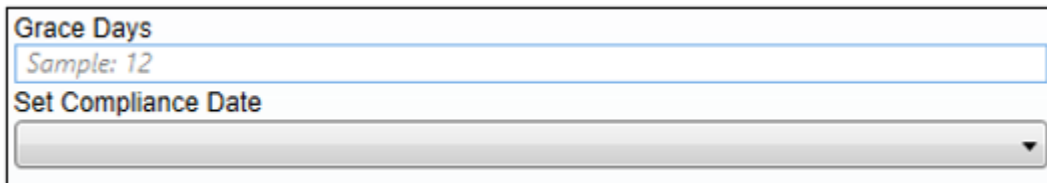
As part of our continued effort to provide the tools necessary for our users to document and show compliance with various regulatory requirements, we have added new core features related to scheduled maintenance activities. These features allow TMS schedule managers (*schedules* are defined as **PM**, **PE**, and **Inspection** records within the **Schedules** menu) to define the number of days (called **Grace Days**) in which a technician must complete a scheduled Work Order. To meet the various agency rules, the schedule manager can also determine how that grace period is defined. These choices are represented on the **Scheduled Work Order** when it is generated.

This new feature adds two new fields to the **Schedules** module and one new field to the **Work Orders** module, and several data sources for use on **Dashboards**.

How Does it Work?

The Schedules Module

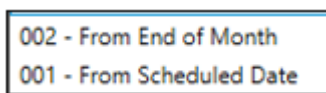
The **Schedules** module has two new fields dedicated to Schedule Compliance: **Grace Days** and **Set Compliance Date**. These are available on Calendar-based Schedules only and will be visible for Schedules having the B-Both (Calendar and Meter) or C-Calendar Schedule Type codes.



The screenshot shows a form with two fields. The first field is labeled "Grace Days" and contains the text "Sample: 12". The second field is labeled "Set Compliance Date" and is currently empty.

Grace Days is a positive whole number representing the number of days of the compliance period. The number is added to either the Next Due Date or end of month (configurable) when a Work Order is generated from the Schedule.

Set Compliance Date determines how the **Grace Days** value is applied to the Next Due Date and has two options.



The screenshot shows a dropdown menu with two options: "002 - From End of Month" and "001 - From Scheduled Date".

- **From End of Month.** This option will add the **Grace Days** value to the last day of the calendar month of the Next Due Date. For example, if the Next Due Date is 2/1/2023 and the **Grace Days** are 10, TMS will set the **Schedule Due By** field on the Work Order to 3/10/2023 11:59 PM.
- **From Scheduled Date.** This option will add the **Grace Days** value to the current Next Due Date. For example, if the Next Due Date is 2/1/2023 and the **Grace Days** are 10, TMS will set the **Schedule Due By** field on the Work Order to 2/11/2023 11:59 PM.

These new fields are also available within the **Schedule Mass Edit Data Maintenance tool**, allowing TMS administrators to set them across Schedules with similar characteristics.

The Work Order Module

The **Work Order** module has a new datetime field called **Schedule Due By**. This field will contain the results of the **Grace Days** and **Set Compliance Date** values. It is placed within the **Calendar** section of the **Details** tab, along with the **Date Available** and **Date Needed** fields. Since this field is calculated by TMS, it is not editable. However, it can be added or excluded from custom forms as needed.



The screenshot shows a form with three fields. The first field is "Date Available" with a dropdown menu showing "3/16/2023" and a time selector showing "12 :00 AM". The second field is "Date Needed" with a dropdown menu showing "3/16/2025" and a time selector showing "12 :00 AM". The third field is "Schedule Due By" with a value of "3/26/2023" and a time of "11 :59 PM".

If the Schedule is a Monthly or greater frequency and either **Grace Days** or **Set Compliance Date** are left blank, TMS will set the **Schedule Due By** to the last day of the calendar month of the Next Due Date. This helps our customers communicate best-practices regarding schedule completion.

To ensure you can meet the documentation requirements for schedule maintenance, we have added new **Work Order Status** and **Sub Status** entries to aid our customers in their regulatory compliance activities.

- Under the TMS standard Work Order Status Code of ACTIV, we have added new sub statuses of:
 - A code of EIU with a Description: Equipment\Space In Use
 - A code of ENL with a Description: Equipment Not Located
- Created a new TMS standard Work Order Status Code of CNP with a description of Closed Not Performed. Under this new Status Code we added these new TMS standard Sub Status Codes:
 - A code of EIU with a Description: Equipment\Space In Use
 - A code of ENL with a Description: Equipment Not Located

These codes will document when your team cannot complete scheduled maintenance due to equipment or space unavailability.

Reporting

To provide you with the tools to report on compliance for scheduled maintenance, we added five new data sources to the **System** segment, so that they are accessible in each of your user segments.

1. DB-Scheduled Maintenance Compliance (This Month)
2. DB-TMS SC-EIU/ENL Open Scheduled WO Listing
3. DB-TMS SC-EIU/ENL Work Orders (Scheduled Last 3 Months)
4. DB-TMS SC-PM Compliance (Current Month)
5. DB-TMS SC-PM Compliance (Previous Month)

In addition, we have added a new report, **SC WO Detail Report**, to display the new **Schedule Due By** date field.

Session Management

To improve security, Accruent implemented mandatory **Session Management** in TMS 5.29. This feature will automatically log you out of TMS if there is no activity within the browser tab for a period of time, automatic refreshing not included, as defined by your TMS Administrator.

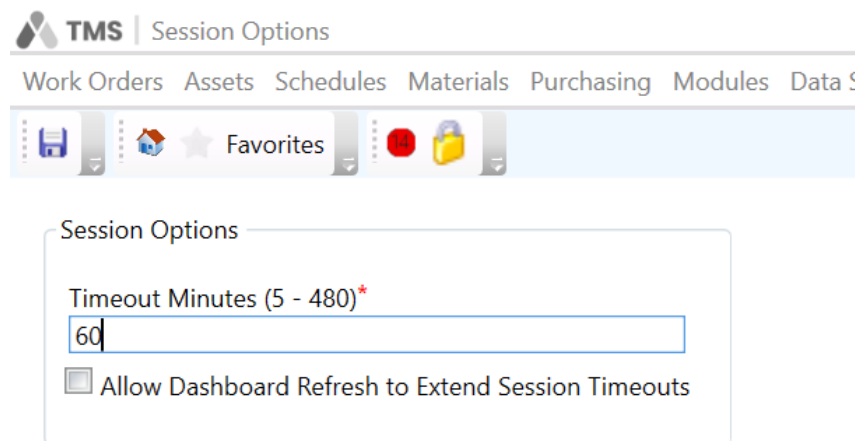
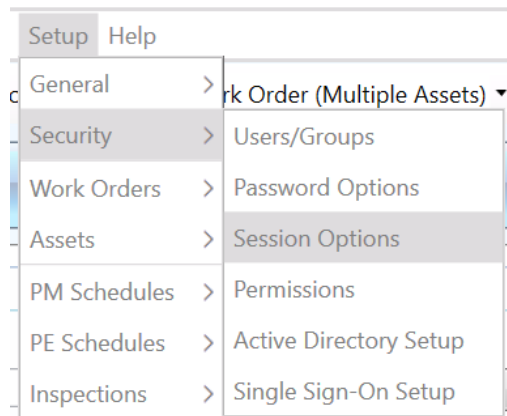
- Default 30 minutes
- Maximum 480 minutes

Session Management cannot be turned off; you are limited to configuring the **Timeout Minutes** value.

Configuration

TMS administrators or other users that have Group and Segment permissions which permit Full Access to the Setup\Security\Session Options page can define a Timeout Minutes value between 5 and 480. The

default value is 30 minutes. If a user logs in to TMS but there is no activity within the TMS application for the defined period, the user will be automatically logged out of TMS.



There is an optional checkbox labeled **Allow Dashboard Refresh to Extend Session Timeouts**. When checked, TMS recognizes a dashboard refresh as activity to renew the session, so that the user is not logged out. This can be useful if you have TMS open and displaying a dashboard on a screen in your shop.

Note: Changes to Session Options do not take effect for users that are logged in at the time of the change until they have logged out and then logged back in again. For example, if the current **Timeout Minutes** value is 30, and you change it to 60 while there are users logged in to TMS, those user sessions would still time out after 30 minutes of inactivity. Once they log out and then log back in, their new session would time out after 60 minutes of inactivity.

Timeout Message and Behavior

When the user session is terminated due to inactivity, TMS will display a message stating that the session has expired. After the user clicks **Close** to dismiss the message box, they will be redirected to the **Login** page to log in and begin a new session.

Issue Maintenance

The following customer reported issues have been fixed.

JIRA / IID	Component	Summary
TMSPROV-5538	Form Editor	We restored the ability to use the Asset Group field on custom Inspection and PM Schedule forms.
TMSPROV-8386	Work Order	<p>When using the Work Order Transfer wizard to move a work order record from one segment to another, TMS now allows you to change the Status value from Active to Pending, enabling you to begin a different workflow progression if the new segment has different requirements from the original one.</p> <p>Previously, this change in Status was disallowed, and the work order had to be cancelled and then recreated using the Pending status.</p>
TMSPROV-8389	Mass Edit	We corrected an error that could occur using the Schedule Mass Edit wizard . If a user initiated the wizard > proceeded to the point of defining new values > backed up to the form selection page > defined new Schedule Classification, Query Form, and Update Form values > then proceeded moving forward from that point, TMS would display a fatal error after selecting the schedules to modify and clicking Next .
TMSPROV-9428	Mass Edit	<p>To standardize the options that are available when mass editing schedules, we exposed the full Calendar section on the PE - Mass Edit page, matching the functionality that is currently available for mass editing PM Schedules.</p> <p>The PE - Mass Edit page now displays the following fields in the Calendar group:</p> <ul style="list-style-type: none"> • Next Due Date • Next Due Date by Frequency (checkbox) • Frequency <ul style="list-style-type: none"> ○ Frequency Factor (depends upon value selected for Frequency)

JIRA / IID	Component	Summary
		<ul style="list-style-type: none"> ▪ If Frequency = Annual, then Years field is displayed ▪ If Frequency = Days Interval, then Days field is displayed ▪ If Frequency = Floating Date, then Months, Weeks, and Days fields are displayed <ul style="list-style-type: none"> • Grace Days (new field) • Set Compliance Date (new field) • Last Completed (read-only - no value) • Last Generated (read-only - no value)
TMSPROV-10147	Due Dates	We corrected a bug that would result in the Schedule Mass Update tool failing to update the Next Due Dates of the selected PM Schedules if the current Next Due Date was a date other than today's date.
TMSPROV-10191	Custom Fields	We removed access to the following Modules in the New Form dialog when creating a Custom Form, as these Modules do not support Custom Forms: <ul style="list-style-type: none"> • Message Center • Segment Fields • Segments • Stored Procedure Schedule
TMSPROV-10239	Request Portal	We corrected an error that occurred when submitting Classic Web Requests and Request Portal Requests which contain a < character immediately followed by a letter in a text field. <p>Note: Any HTML characters entered through Web Request or Request Portal will be converted to ASCII characters.</p>
TMSPROV-10447	Request Portal	If a user creates a Web Request form that contains a User Defined Field (UDF) , and defines a Custom Label value for that UDF , then the Custom Label value now accurately displays in the Work Order Field Designer and Properties Editor and replaces the original value.
TMSPROV-11649	Schedules	When using a multi-asset form , modifying the order of assets on a Preventive Maintenance (PM) or Inspection (IN) Schedule that includes three or more

JIRA / IID	Component	Summary
		assets and then deleting one of the assets no longer causes TMS to revert to the prior order. TMS now retains the newly defined order, minus the deleted asset.
TMSPROV-11962	TMS Core	<p>TMS will now display an informational message indicating that the page is missing required fields when you click Save on the Document Edit dialog (under the Document Manager for Assets and Work Orders) without entering a value for the requires fields labeled Description and Web or File Link.</p> <p>Previously, TMS would display an unrecoverable error that forced the user to log out and log back in, losing any unsaved changes.</p>
TMSPROV-12940	Request Portal	<p>For Microsoft Edge users accessing the Request Portal, we have improved the display of the Request Portal Activity Tiles to use the entire width of the screen before beginning a new row. Previously, all tiles were displayed in a single column.</p> <p>We have also improved the display of drop-down selector fields so that only a single drop-down arrow is displayed.</p>
TMSPROV-12958	TMS Core	<p>We updated the cursor display to depict the current state of the application more accurately. TMS now displays the correct cursor based on the current actions:</p> <ul style="list-style-type: none"> • Arrow when no query is running • Blue circle when query is executing • Link pointer when hovering over a clickable object
TMSPROV-13206	TMS Core	<p>We corrected an issue that would prevent TMS from returning the cursor display from a busy cursor (spinning blue circle) to a normal cursor (arrow) if a query yields no results.</p>
TMSPROV-13934	Procedures	<p>Changing the order of sub procedure choices while simultaneously changing the label of the moved choice value no longer results in the deletion of a choice value from the choice list.</p>

JIRA / IID	Component	Summary
TMSPROV-13942	Request Portal	Dedicated Hosted TMS sites can now log in to the Request Portal with any native TMS credentials or using SSO authentication (if enabled).
TMSPROV-14402	Custom Fields	We corrected an issue that made the Dispatch module listed in available modules when creating or editing Custom Fields and External Links .
TMSPROV-14850	TMS Core	We corrected a typo on the Confirmation dialog that displays when attempting to delete a Sub Procedure included in an If/Then Flow from a Procedure .
TMSPROV-15014	TMS Core	We corrected a bug that allowed you to save Zip Codes containing an invalid number of digits.
TMSPROV-15025	Materials	We corrected a bug that would cause TMS to display records out of order in the Transactions grid of a Material record when using the Date Created column to determine the sort order.
TMSPROV-15190	Audit Log	When a user with asset editing security permissions modifies the Status, logging of the Reason for Change value to the Asset Audit Log History is now restored.
TMSPROV-15300	TMS Core	TMS no longer populates the Time component of any Date/Time fields with the value 12:00 AM when executing a query. Automatically populating this value was causing TMS to return no results if there were no records matching the exact date and time entered.
TMSPROV-15322	Survey	We corrected an issue that could cause TMS to fail to send Surveys upon work order completion.
TMSPROV-15334	Messaging Center	We repaired the functionality of the Accept Message button that acknowledges Message Center messages.

JIRA / IID	Component	Summary
		<p>The messages are displayed to you on login when the following fields are enabled:</p> <ul style="list-style-type: none"> • Show Messages on Login • Require Message Acceptance
TMSPROV-15664	Control Panel	<p>We corrected a bug that was preventing the PartsSource integration from automatically processing orders.</p>

TMS Release Notes – March 2023

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