ACCRUENT

ACCRUENT TMS

RELEASE NOTES 5.30

October 3, 2023

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Release Information

Release Version: 5.30 September 2023

Introduction

This document describes the features and functionality of the TMS 5.30 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

Meter Based Inspections

Background

To empower TMS customers with the ability to establish inspection schedules based on meters, we are introducing two new **Schedule Type Codes** for **Inspection Schedules**. This functionality, already present in **PM Schedules**, is now extended to **Inspections**. When an Asset requires both **PM** and **Inspection Schedules**, TMS will generate both **PM** and **Inspection Work Orders**.

Details

When a TMS user selects **Schedules > Inspection New** and chooses an **Inspection Form** for asset selection, the **Schedule Type** field becomes visible in the **Template** section, requiring an entry. This field offers two existing **Schedule Type Codes**. To support assigning meter-based schedules to assets, we introduce two new **Schedule Type Codes**, paralleling the functionality of **PM Schedule** records.

This new feature will also apply to **IN Schedule** records. The **Schedule Type** code drop-down is available in **Query** and **Edit** modes, as well as on custom forms.

Usage

Users can now take advantage of the Inspections module functionality on Meter-based Schedules. This will be carried into the TMS Sidekick and its Inspections module as well. Users will now see the **Both Calendar and Meter** and the **Meter** types, allowing TMS to generate **Inspection Work Orders** when the Asset's **Current Meter** value surpasses the **Next Due Meter** value on the **Inspection S**chedule.

Meter-based Data Integrity Enhancements

We have improved data integrity by ensuring that **meter-based Schedules** only include assets with valid meter types and readings. This enhancement ensures data integrity and regulatory compliance by requiring Assets with meters to have both a **Meter Type** and **Meter Reading**.

Cyber Security Editable Grids

We continue enhancing information security, cyber security, and integration sections of TMS by allowing the addition, editing, and deletion of **External Reference, Network Adapter,** and **IP/Network Address** records within the TMS User Interface.

Implement the TMS Default Procedure Package

We have enhanced our customers' ability to meet regulatory compliance for standardized maintenance procedure-based activities. This enhancement provides the option to assign pre-defined procedures to individual assets and default procedures to **Work Order Skill** and **Work Order Type** codes. These enhancements support regulatory requirements for procedural approaches such as ILSM, ICRA, PICRA, LOTO, and other processes that require specific sets of activities.

Enable "Default" Schedule Status Code for Inspection Schedules

Default (Template) Inspection Schedules

As part of our effort to standardize scheduling options, we now offer the ability to define **Default (or Template) Inspection Schedules**. This automatically assigns an **Inspection Schedule** to a new **Asset** based on the defined **Category** and **Subcategory**.

How it Works

When creating or editing an **Inspection Schedule**, a new value called **Default** is available in the **Schedule Status** field. Selecting this value hides the **Asset Number** and **Asset Group** fields while displaying the **Category** and **Subcategory** fields for defining the applicable **Category** and **Subcategory** for the default **Inspection Schedule**. When a user with group and segment permissions creates a new Asset, and the **Category** and **Subcategory** match those in the **Default Inspection Schedule**, TMS will attach the **Inspection Schedule** to the newly created Asset. This mirrors the functionality of **PM Schedules**.

Implement new Standard Designer Report Format

We have updated the standard **Master Record** detail reports with modern, cleaner formats for improved readability and understanding. These updates won't impact any custom reports created by customers.

Work Order State (Open/Closed)

We have introduced a new setting called **Is Done** on **Work Order Status Codes**. This allows customers to easily identify if a code represents an **Open** or **Closed Work Order**. You can adjust this setting in **Setup > Work Orders > Codes** by selecting the **Status Code** option and updating the checkbox as needed.

TMS will use this setting in **Queries** to retrieve records with either **Is Done (Yes)** or **Is Not Done (No)** flag checked. This facilitates record retrieval. This setting also enables new functionality in Dashboards, landing pages, and swim lanes.

As part of this release, we have updated TMS System-level Work Order Status Codes. If the Status Code is CMPLT, CLOSE, CANCL, or CNP, the **Is Done** flag is set to **True (checked)**.

Note that users can't adjust this setting for the TMS System Codes, adhering to our longstanding practice.

Improvements and issues fixed

Component	Summary	Reference #
TMS	We corrected an error preventing you from accessing all the available codes for the **Procedures** module from within the **Code Find and Replace Data Maintenance** tool.	3142
Procedures	We improved how TMS works when adding **Sub Procedures** to an existing **Procedure** by enforcing the **Query** button function to find matching records.	4440
Due Dates	We corrected an issue where TMS would not always properly merge **Inspection Schedules** during generation.	7378
Discussion Boards	We added the ability to create Discussion Board **Posts** and **Replies** that contain carriage returns to let customers have more meaningful messaging in the module.	8165

Data Sources	We fixed an issue where TMS would pre-check the **Use On-The-Fly Ad-hoc Query** checkbox when creating or editing specific Data Source Types.	8893
Contracts	We corrected a malfunction with creating **Custom Forms** in the **Contracts** module that occurred when adding a standard field in a section by itself, and then removing that field from the section to place it in a new section, leaving the original section empty.	12027
TMS	We restored the ability to query **Inspection Schedules** using **multi-Asset** forms and the **Asset Group** drop-down field.	12066
Saved Queries	We added a parameter to the **Current Month PM Completion** and **Current Month WO Completion** Saved Queries in the **System Segment/Work Order m**odule. The parameter **CompleteDate Is This Month** was absent.	12451
Request Portal	We have improved customer data integrity by ensuring that dependent fields such as **Site**, **Building**, and Location are properly validated on forms.	12733
TMS	We removed a blank drop-down field that was displayed on the **Code Setup** dialog in error.	13152
Saved Queries	When attempting to delete a **Saved Query** that is referenced in a **Data Source**, TMS no longer deletes the **Query Text** from the **Saved Query** or from the **Data Source**.	13268
Request Portal	We improved the way Request Portal tiles are sorted by better defining the sort order. They are now sorted alphabetically first by Activity Tile Name, and if that is missing it will sort by the Web Request Page Title.	13324
TMS	TMS now supports the mouse scroll wheel in the expanded **Sub Procedure Readings** section of the **Procedures** tab of a work order if the scroll bar is present.	13829
Assets	We updated an issue preventing validated or masked custom fields to be added to **Web Request** forms.	14168
API	When performing a **SOAP** call to **WorkOrderWS.asmx?op=GetAssignments** the response XML now contains the email information for the resource assigned to the Work Order.	14406

Schedules	We corrected an issue that would cause an active asset to be unintentionally removed from a **PM** or **IN Schedule** if the following conditions were met: • The **PM Schedule** contains two assets (and uses a multi-asset form) • The first asset in the grid list is **Retired** • The **PM Schedule** is generated These conditions no longer cause the second asset in the grid list to be removed from the schedule.	14913
TMS	We corrected a bug that caused the **Asset Delete Wizard** to fail to delete an **Asset** and associated **Inspection Schedule** in cases where the **Asset** had no work orders in the **History**.	15013
Data Sources	We updated the **Data Source Module** listing to only include reportable modules and to address if invalid modules are selected.	15125
Message Center	We addressed an issue where an error message was not displayed in the **Message Center**. Now, when a user with permissions to the **Message Center**, that can add or delete messages, tries to delete an existing message that cannot be deleted due to constraints, the user is immediately provided a message telling them that it cannot be deleted and why.	15340
Web Request-Classic	We corrected a bug that could cause Assets created by **Classic Web Request** forms to create Assets in TMS with **Asset Description** values that do not match what was entered in the **Classic Web Request** Form. This would occur if the Asset Option **Fill Asset Description with Sub Category Description** was enabled, and the General Option for the **Drop-down Format** was set to either **Code - Description** or **Description - Code**. The **dash** character in the Asset Description was represented as ** -** instead.	15403
Work Order	We restored the ability to assign **Unavailable Resources** to **Work Orders** and **Schedules** while in **Edit** mode.	15475
Dashboard	Users with **Read Only** access, or who have **Modify** access set to **Deny** on **Dashboards**, can no longer save changes by navigating away from the **Dashboard** module after making a change.	15526
Work Order	If your organization is using a **Custom Work Order** form that includes the **Assignment** field in **Create** mode, TMS will not alert you if you attempt to assign a **Resource** that is currently **Unavailable**.	15895

	You continue to have the option of choosing **Yes** to assign that person.	
Logbook	We corrected a bug that could cause TMS to unexpectedly display the **Messages** Inbox when querying for **Sub Procedure** records.	15935
Web Request	We added the TMS methods of allowing defaults for **Site**, **Building**, or **Location Codes** in **Web Request** pages to work on **Request Portal** pages as well.	16304
TMS	Open Print Dialog was failing to open when **Show Report Preview on Quick Print** was unchecked. Now, when the **Show Report Preview on Quick Print** option is unchecked, TMS displays the Windows **Print** dialog after clicking **Print** on the icon toolbar.	16375
Assets	We addressed an issue that caused an invalid error message when creating an asset.	16409
Data Sources	To make creating and editing **Data Sources** easier and quicker, we removed the **auto-refresh** function and added a new **Run** button to show results only when the user is ready to see them.	16426
Schedules	We corrected an issue where TMS was not properly notifying users when they attempted to edit a **Schedule** assigned to an **Asset Group**.	16445
Custom Fields	We corrected an issue that may prevent users from assigning **Custom Fields** to segments.	16476
Request Portal	We corrected an issue where the **System segment** was listed in the drop-down selector in the **Request Portal**.	16775

TMS Release Notes – October 2023

Accruent, LLC
11500 Alterra Parkway
Suite 110
Austin, TX 78758

www.accruent.com