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Management Solutions

A Quick Guide to the TMS Microsoft
Outlook Widget



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1 Overview

The TMS Mitrefinch Outlook widget is a plug-in for Microsoft Outlook, which allows you to seamlessly interact with certain TMS version 6 features whilst using Outlook. This intuitive add-on significantly saves your time by reducing the amount of applications used.

2 Features

The TMS Mitrefinch Outlook widget's features include:

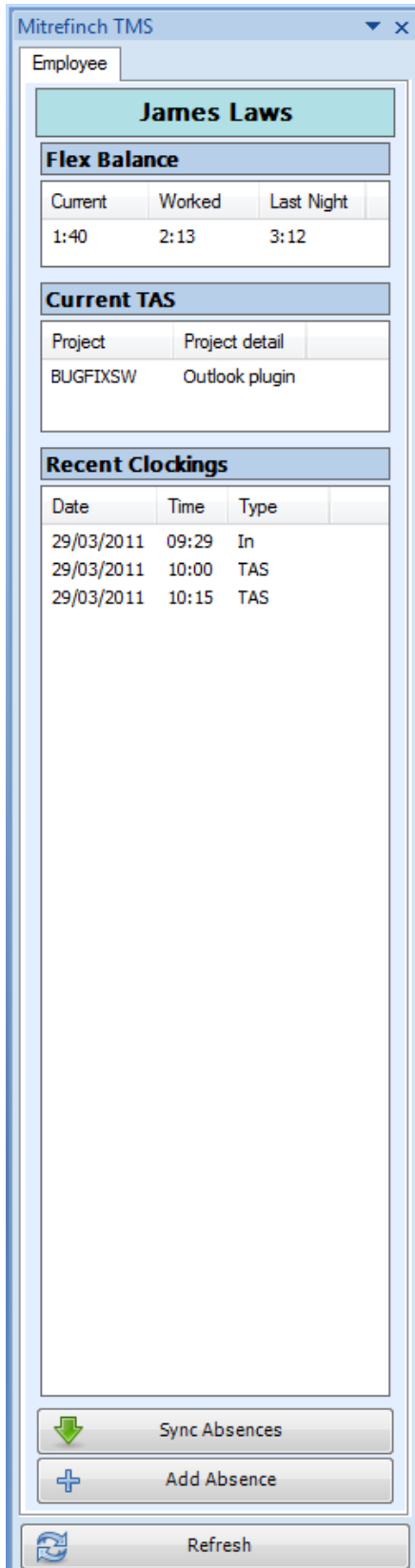
- viewing recent clockings, flex balance, hours worked, and hours allocated to projects
- making holiday request directly from Outlook
- accepting holiday requests
- booking absences
- viewing the Onsite list and the Request list
- synchronization of the Absence Profile with the Outlook calendar

The features available depend on whether a user is logged in as an Employee, a Supervisor or as both at the same time.

3 Requirements

In order to access the Microsoft Outlook widget, every user needs a Microsoft Outlook licence and a TMS version 6 licence. Along with the user guide you will be supplied with a SETUP.EXE file which will install the plug-in onto your computer.

4 Employee Mode



The screenshot shows the 'Employee' tab for James Laws. It contains the following sections:

- Flex Balance:**

Current	Worked	Last Night
1:40	2:13	3:12
- Current TAS:**

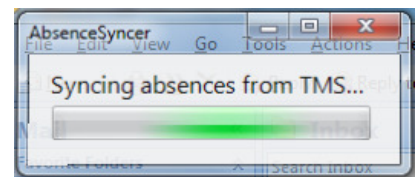
Project	Project detail
BUGFIXSW	Outlook plugin
- Recent Clockings:**

Date	Time	Type
29/03/2011	09:29	In
29/03/2011	10:00	TAS
29/03/2011	10:15	TAS

At the bottom of the widget are three buttons: 'Sync Absences' (with a green arrow icon), 'Add Absence' (with a plus icon), and 'Refresh' (with a circular arrow icon).

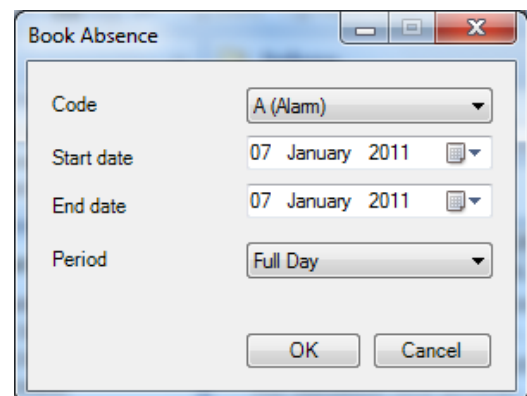
After logging in as an employee, the Employee tab will appear in the TMS task pane. This displays your flex balance (if applicable), your current Time Allocation System (TAS) project (if applicable) and a list of your recent clockings.

The buttons at the bottom of the tab allow you to synchronise your absences with your TMS calendar and add a new absence request.



The absence synchronization feature copies all of your absences and requests from TMS to your Outlook calendar. It creates and uses the categories "TMS Absences" and "TMS Requests" to keep track of which events it has created, and you must not remove or rename these categories, though you can change their colours.

The add absence feature displays a dialog box (right), which allows you to add a new absence request to TMS.

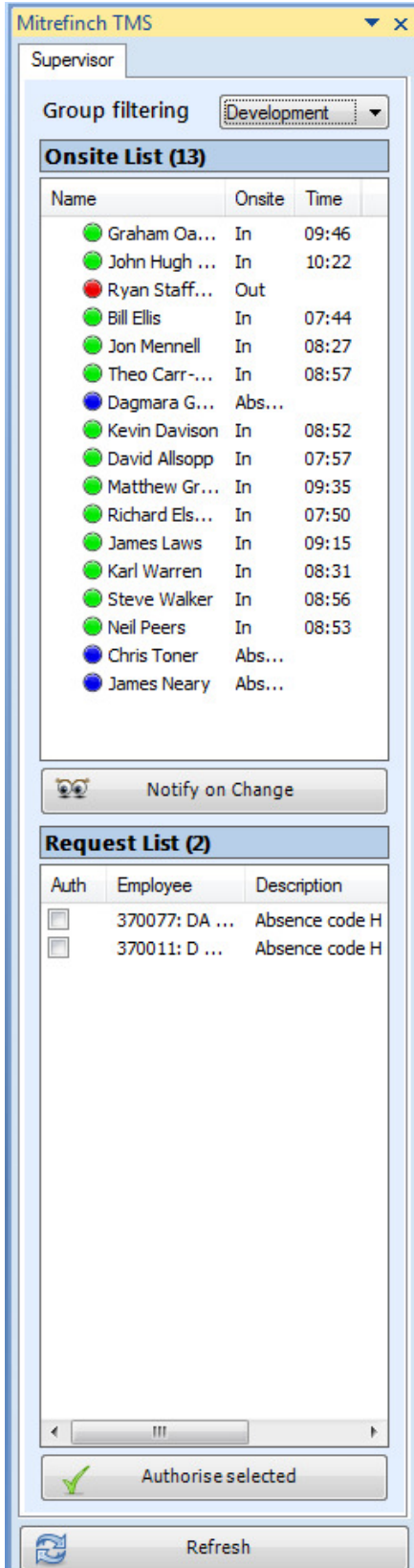


The 'Book Absence' dialog box contains the following fields:

- Code:** A (Alarm)
- Start date:** 07 January 2011
- End date:** 07 January 2011
- Period:** Full Day

Buttons: OK, Cancel

5 Supervisor Mode



Onsite List (13)

Name	Onsite	Time
Graham Oa...	In	09:46
John Hugh ...	In	10:22
Ryan Staff...	Out	
Bill Ellis	In	07:44
Jon Mennell	In	08:27
Theo Carr-...	In	08:57
Dagmara G...	Abs...	
Kevin Davison	In	08:52
David Allsopp	In	07:57
Matthew Gr...	In	09:35
Richard Els...	In	07:50
James Laws	In	09:15
Karl Warren	In	08:31
Steve Walker	In	08:56
Neil Peers	In	08:53
Chris Toner	Abs...	
James Neary	Abs...	

Request List (2)



Auth	Employee	Description
<input type="checkbox"/>	370077: DA ...	Absence code H
<input type="checkbox"/>	370011: D ...	Absence code H

After logging in as a supervisor, the Supervisor tab appears in the TMS task pane. This displays a list of users with their onsite status and a list of pending requests.

When you login as a Supervisor and an Employee the Supervisor tab will be shown first, with the Employee tab accessible at the top of the TMS task pane.

5.1 Onsite List

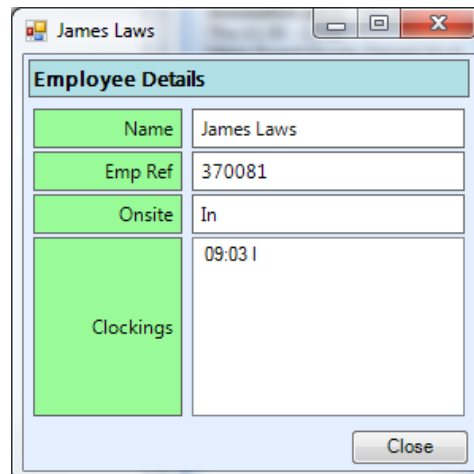
The onsite list uses coloured icons to represent the onsite status of employees, which correspond to the contents of the Onsite column. This Onsite List features the same preferences as the Silverlight Onsite List.

 - Absent
  - Mobile
  - In
  - Out

The last time a user clocked in or out is also displayed. To set a notification for an employee, select their name in the list and click on the “Notify on Change” button. An icon appears to the left of the users onsite icon to indicate that the user is being monitored.

When a monitored user clocks in or out, a message box will be displayed with their name and new status. To stop monitoring a user, select them again and click the “Cancel Notification” button.

If you double click on an employee in the Onsite List you will be presented with a more detailed view of that employee. Details include; Name, Employee Ref, Onsite status and a list of Clockings.



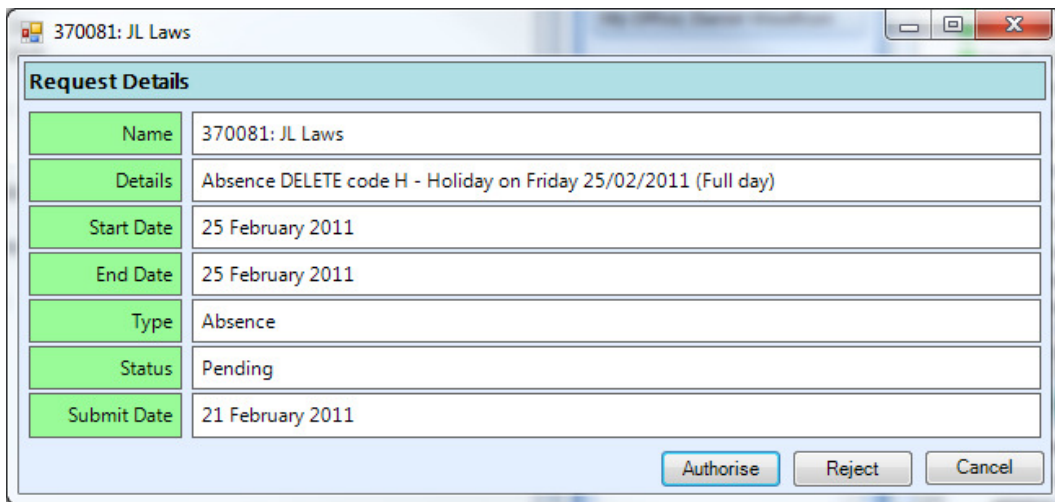
Employee Details

Name	James Laws
Emp Ref	370081
Onsite	In
Clockings	09:03 I

5.2 Request List

The requests list shows all outstanding requests made by your employees. To authorise them, tick the check boxes next to the requests you want to authorise, then click the “Authorise Selected” button. Note that this cannot authorise requests that require a modification to work records. Another interface to TMS must be used to authorise these requests.

If you double click on a request in the Request List you will be presented with a more detailed view of that request. Details include, Name and Employee Ref associated with the request, Request Details, Start and End date, Type of absence, Request status and the Submit date of the request.



Request Details	
Name	370081: JL Laws
Details	Absence DELETE code H - Holiday on Friday 25/02/2011 (Full day)
Start Date	25 February 2011
End Date	25 February 2011
Type	Absence
Status	Pending
Submit Date	21 February 2011

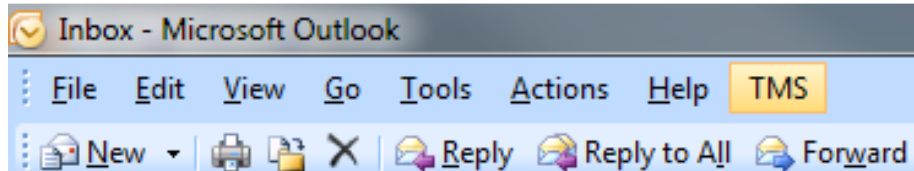
Buttons: Authorise, Reject, Cancel

The Outlook plug-in respects access rights, therefore if the Supervisor does not have access to the Request List or the Onsite List then the appropriate list is not shown.

Within the Outlook plug-in Supervisors have the option to filter the Onsite list and Request list by groups (Like the Selection options within the WinTMS and Silverlight interfaces).

6 Options

The Mitrefinch Outlook plug-in has its own menu contained within the standard toolbar.



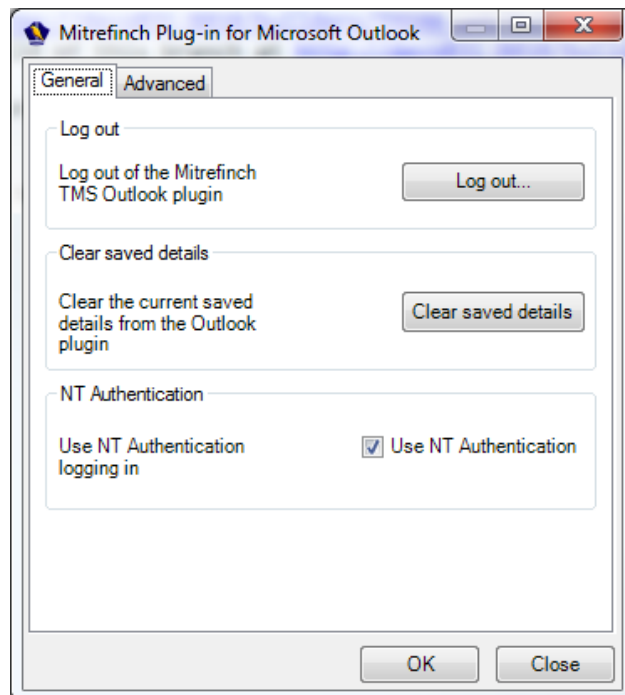
From this menu you can access the plug-ins options.

6.1 Standard Options

Log out – This logs you out of the plug-in, allowing you to log in as someone else.

Clear saved details – This clears any saved login details.

NT Authentication – This option allows the user to log into the Outlook plug-in using NT Authentication. This will not work if NT Authentication is not implemented.



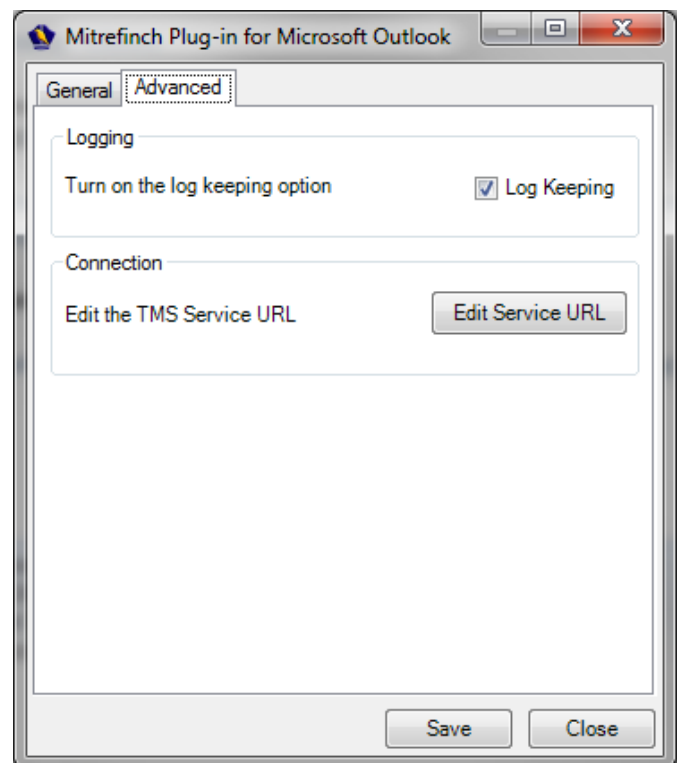
6.2 Advanced Options

Log keeping - This option allows you to turn on the Log Keeping option. This will keep a log of any unusual behaviour from the plug-in. This log file is kept in the Application Data path, the format (for Windows 7) is:

C:\Users\

This log can be sent to the Mitrefinch Development team if you are having problems with the Outlook plug-in.

Edit Service URL – This allows you to edit the TMS Service address URL within a text editor program. This is needed if the service name is ever changed.





If you require more information, or you would like to book a training day,
contact your account manager on 0845 619 0070.

**Not using TMS version 6?
Contact us to receive your upgrade!**

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