TMS8

Upgrade Notes

mitrefinch

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1 Overview

This document is an upgrade summary for TMS8, which includes additions, updates and removal of features in each release.
When using the term TMS8 we are referring the web solution unless explicitly stated otherwise.

2 Release 8.0.1.0

2.1 Forced password encryption upgrade

When running the TMS8 SYSGEN upgrade, all passwords will be re-encrypted with SHA256. This is a more secure hash that cannot easily be decrypted.
As the passwords can no longer be decrypted, if user locks the MASTER account they must contact Mitrefinch Support to get a one-time, time limited, password.

2.2 Separation of employee PIN and password

The option of using an employee PIN or password no longer exists - the *Use PIN as password* preference has been removed.
When running TMS8 SYSGEN upgrade, if the *Use PIN as password* preference is checked all PIN's will be encrypted, using SHA256, and moved to the Password field.
The employee password will be used to log in to all TMS8 applications.
The employee PIN will only be used for access control.

2.3 Adaptive layout

TMS8 is designed as a cross-platform and multi form factor solution, i.e. it can be used in many browsers and on many devices. To handle the different rendering resolutions (pixels) of devices, such as tablets and mobile phones, TMS8 implements an adaptive layout.
The two screenshots below show TMS8 rendered on a large (desktop) and small (mobile phone) resolution device.
On a large resolution TMS8 renders as follows:

- Navigation pane (left) expanded.
- Quick actions pane (top right).

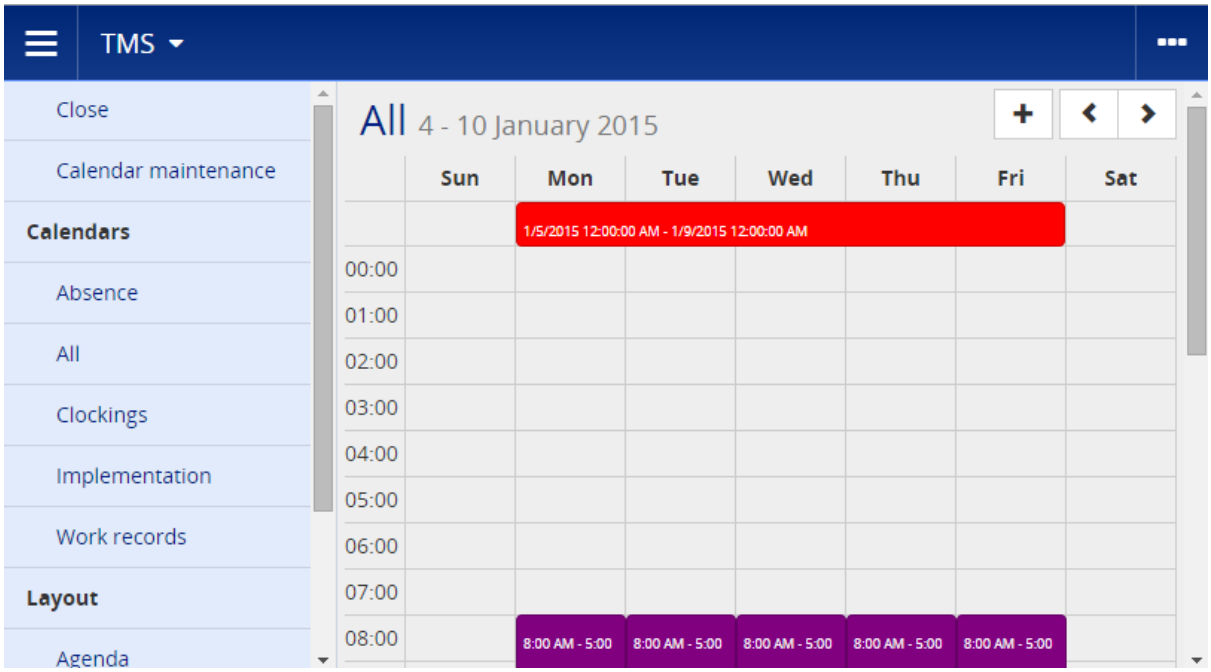


Figure 1: Layout on a device with a large resolution.

On a small resolution TMS8 renders as follows:

- Navigation pane (left) collapsed.
- Navigation pane first action, e.g. Close, rendered in the footer (bottom left).
- Quick actions pane rendered in the footer (bottom right).

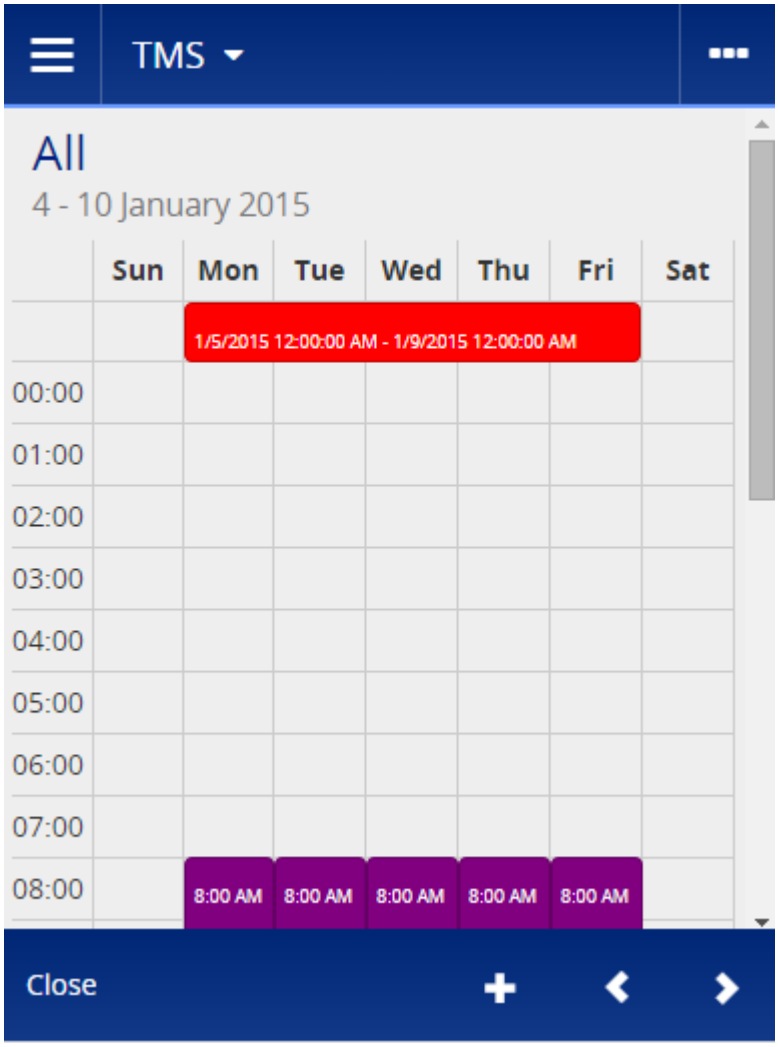


Figure 2: Layout on a device with a small resolution.

2.4 Globalisation feature

Globalisation is now tightly integrated into, and completely maintained via, TMS8. Globalisation consists of two parts:

- Language – the phrases displayed on a page.
- Culture – the date, time and number formats.

Globalisation consists of the following features:

- All phrases displayed on a page can be changed via the Globalisation maintenance page.
    - This includes the default, English, language.
    - Where no translation is found for a phrase TMS8 will display the default, English, phrase.
- A list of supported languages can be defined.
- A language can be assigned to a TMS8 profile.
- A user can choose a supported language from the Login page.

2.4.1 Alternative default culture

As standard; TMS is configured to display the English translation of any terms that have not been translated in the phrases screen. To override this behaviour and specify an alternative language the following web.config key should be amended:
<add key="Lang:AlternateDefaultCulture" value="" />
the value should be set to the desired language such as fr-FR for French.

2.5 Dashboard feature

TMS8 contains a customisable Dashboard consisting of tabs and widgets, which is maintained via the TMS8 Dashboard maintenance feature.

- The Dashboard will default the look and feel of TMS7 for Silverlight, i.e. when there are no tabs (see screenshot below).
- A Dashboard can be configured to display a list of tabs.
- Each tab contains widgets.
- A tab is assigned to a TMS8 profile.
- When a user logs into TMS8 the tabs assigned to their profile will be displayed.

A widget displays live information, such as flexbalance and entitlements, or links to other features.

- Many instances of a widget can be added to a tab. For example, you may add two Entitlements widgets: holiday and sickness (see screenshot below).
- The HTML widget can be used to display external information in TMS8, e.g. an intranet page.
- TMS8 widgets can be added to external applications, such as SharePoint (Windows authentication required).

More information about the types of widgets available can be found in the TMS8 Help documentation.

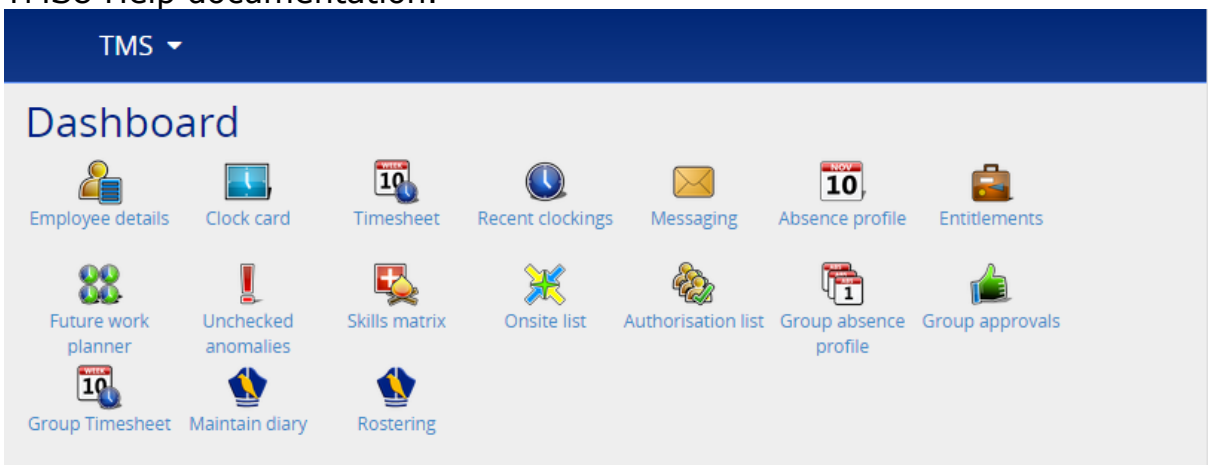


Figure 3: Default TMS8 Dashboard.

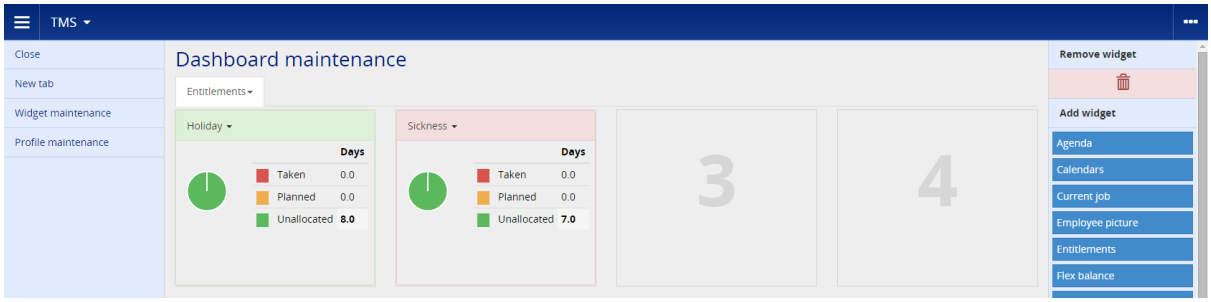


Figure 4: Dashboard maintenance.

2.6 Calendar feature

In previous versions of TMS there were several planners, e.g. Absence profile and Availability. Each of these planners displayed a preconfigured set of data, e.g. absences and rostered days. Often they did not show all of the information required by a user. For example, the Absence profile did not show the group absences, which made it difficult to figure out when a holiday could be taken.

In TMS8 there is a Calendar feature, which allows a customer to define their own planners:

- Many calendars can be defined, e.g. Absence and Worked.
- Each calendar can be assigned different types of data to display, e.g. absence, group absence and availability.
- Each calendar can be assigned to a TMS8 profile.

2.7 TMS panel layout

In previous versions of TMS panels where defined using absolute positioning to place a field on the page. This approach does not work in TMS8 for the following reasons:

- Many form factors are supported, such as mobile devices that are too small to display absolutely positioned controls.
- The panels are not accessible. For example, several did not have associated labels and the ordering was assumed.

To address the issues detailed above the following solution has been implemented in TMS8:

- Panels are now split into 3 columns.
- Inputs are assigned to a column based on their top left positions.

To ensure all future installations adhere to the TMS8 format a new base dataset has been created, in which:

- All panels are accessible.
- All panels are designed around the 3 column layout.

2.8 TMS for Mobile

The TMS for Mobile UI has been redesigned to adhere to the TMS8 web solution look and feel.

- All features in the main TMS8 solution are available in TMS for Mobile (network connection required for some features).
- The transition between offline and online pages is now transparent to the user.

2.9 Themes

A theming system has been implemented that changes the look and feel of TMS8. A different theme can be assigned to supervisor and employee modes, which makes it easier to distinguish between the two. Customers can also define their own theme. To do this copy, rename and modify one of the existing themes in the *Themes* directory (the web site must be restarted before the new theme will be selectable).

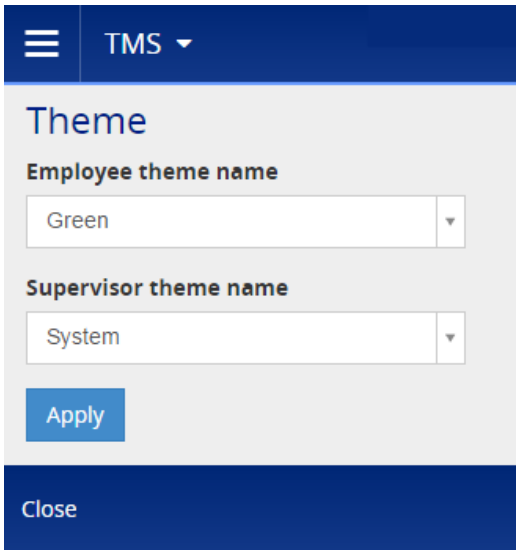


Figure 5: System theme.

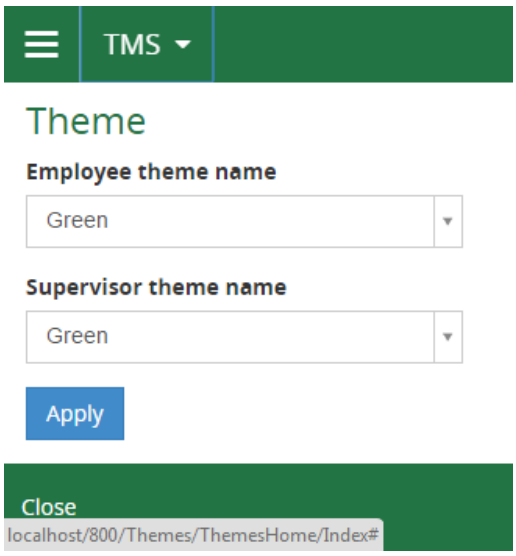


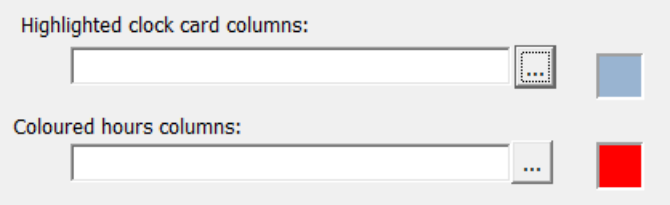
Figure 6: Green theme.

2.10 Removal of Colour Coded Headings in Clock card

The Colour Coding of Columns in the Clock card has been removed. This feature was originally introduced to highlight to employees which columns

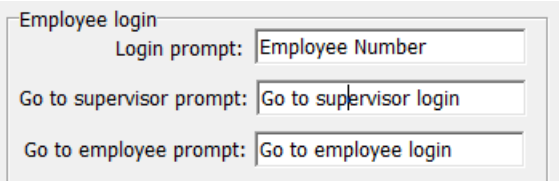
they should edit in the clock card. This has been removed as it is possible in TMS to specify which columns can be edited.
The following preferences have been removed:

- Highlighted clock card columns
- Coloured hours columns



2.11 Removal of Employee Login text overrides in System Preferences

The text overrides for the Web Login prompts have been removed from System Preferences as these can now be updated via Globalisation Maintenance.



3 Release 8.2.3.0

3.1 Displaying a YouTube video on a Dashboard tab

To display a YouTube video on a Dashboard tab you must create a new HTML widget and input a YouTube embedded URL, which can be found as follows:

1. Browse to the YouTube video that you want to display, e.g. https://www.youtube.com/watch?v=CC7l1y20yko.
2. Select the Share hyperlink.
3. Select the Embed hyperlink.
4. Copy the URL that appears in the src element of the text box.
5. Paste the URL into the New HTML widget URL text box.
6. Save your changes.

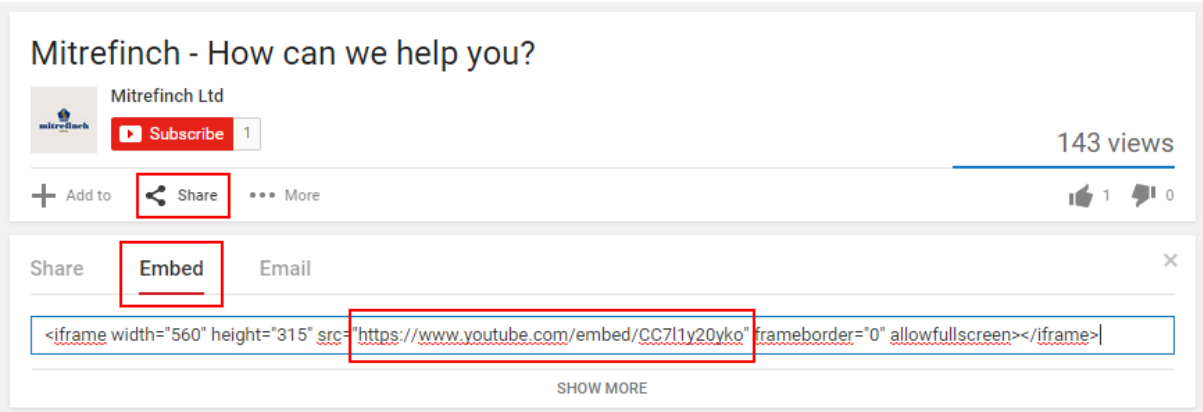


Figure 7: YouTube embedded video URL.

3.2 Report widget

A Report widget can now be added to the Dashboard.

- Only *Rep Gen* reports can be displayed in the Report widget.
- *Ask User* reports cannot be displayed in the Report widget.
- When logged in as a supervisor the report will include employees in the active/selected group.
- When logged in as an employee the report will include the logged in employee only.

If a report requires a date range to display data for, the user will be prompted to enter a *Start date offset* and an *End date offset.* These offsets are the number of days from today to display data for. For example:

- When *Start date offset* is set to -1 the report will start displaying data from yesterday.
- When *End date offset* is set to 1 the report will display data up to tomorrow.

4 Release 8.2.6.0

4.1 Application start up failure page

Sometimes, due to bad configuration, the TMS application start up sequence can fail to complete successfully. When this happens the application may appear to work correctly, but will fail with exceptions with further use. For example, the Login page may appear, but all attempts to login are denied. As the application appears to function correctly the cause of the problem can be difficult to locate.
Errors in the application start up sequence are now captured. When the start-up sequence fails the following will happen:

- The exception is written the ELMAH log (admin/elmah.axd).
- The exception is written to the Windows Event Log.

- All attempts to request a page will result in the Application start up error page being displayed, see below.

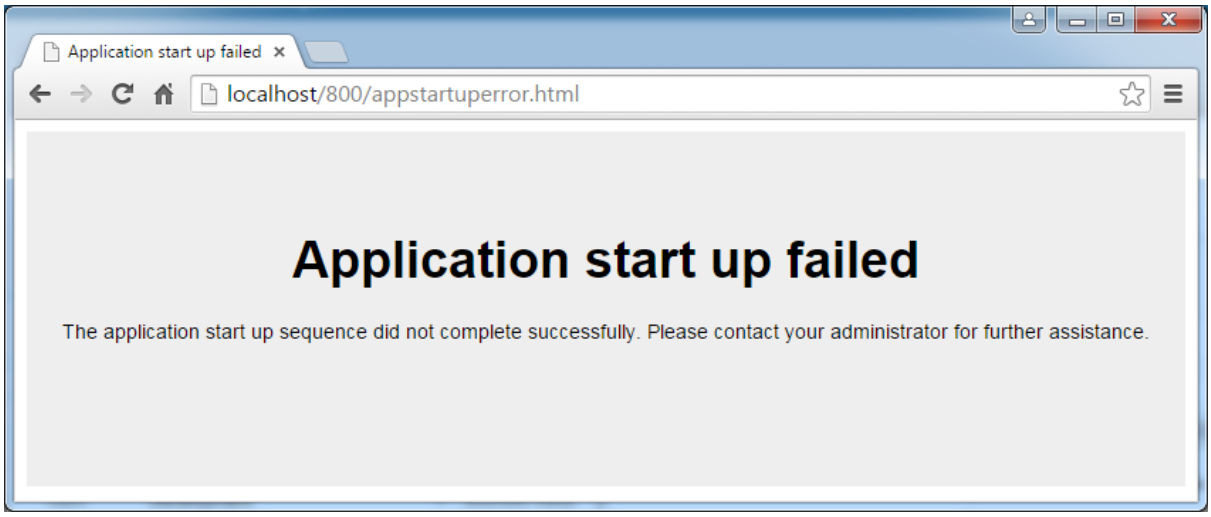


Figure 8: Application start up error page.

5 Release 8.3.0.0

5.1 New licensing structure

Previous versions of Mitrefinch applications were licensed via a file in the TMS data directory named LICENCE.PDF.
The TMS8 licensing structure has changed and does not use the LICENCE.PDF file:

- A licence is specific to a customer TMS installation.
- A licence is non-transferable and will not function on a different installation.
- A customer must provide Mitrefinch with their unique installation ID in order to generate a licence.

A single licence can still be used to provide a customer with both an internal and external TMS web site.

5.1.1 Licence properties

A licence has the following properties:

- **Start date** – date on which the licence becomes active.
- **Expiry date** – last date on which the licence is active.

A licence contains an individual row for each feature, which has the following properties:

- **Feature** – name of the feature, e.g. TMS, HR or Access control.
- **Number of slots** – Number of employees that can be assigned to the feature, e.g. you can create 30 HR employees.
- **Start date** – date on which the feature becomes active.

- **Expiry date** – last date on which the feature is active.

When a feature is not active the user will not be able to access it.

5.1.2 Invalid licence access

When no valid licence can be found, TMS access will be restricted to the following features:

- Employee login page;
- Supervisor login page;
- Change supervisor password page;
- Licensing page;
- SYSGEN (Win32).

When no valid licence can be found the following restrictions are placed on who can access TMS:

- No employee can login.
- Only a supervisor with access to the Licensing feature can login.

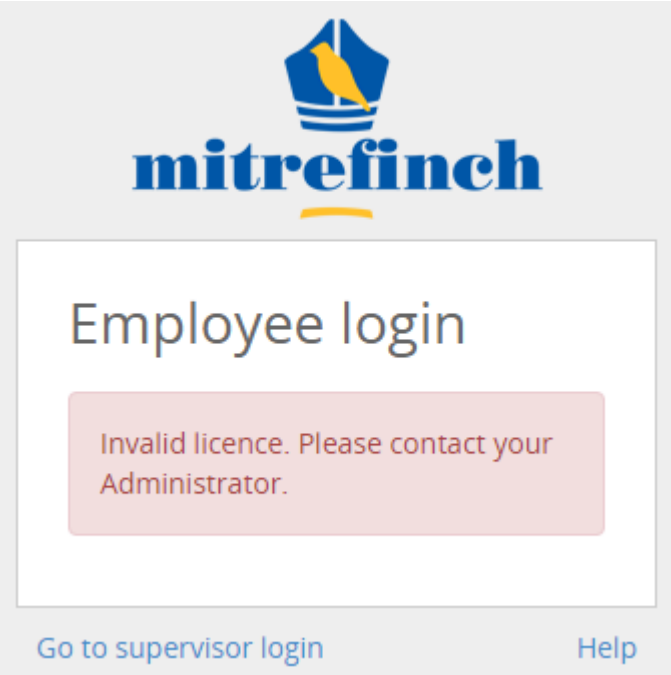


Figure 9: Invalid licence disables employee access.

5.1.3 Invalid licence notifications

When a licence is invalid, TMS will display a licence error notification on the following pages:

- Employee login page;
- Supervisor login page;
- Licensing page.

TMS will display warning messages on the TMS Dashboard and Licensing pages in the following scenarios:

- The licence will expire within the next 30 days.

- A feature will expire within the next 30 days, e.g. TMS, HR or Access control.

5.1.4 Licensing feature

The Licensing feature home page (Licensing/Home/Index) displays the following information:

- Licence errors, e.g. 'Invalid licence'.
- Licence warnings, e.g. 'Access control will expire in 30 days'.
- Licence information, e.g. customer name, licence expiry date.
- Feature licences, e.g. number of TMS and HR slots in your licence.

5.1.5 Activating a licence

A new licence can be obtained via the Email licence request (Licensing/Home/Request).

- The page explains how a new licence can be obtained.
- The unique installation ID is generated from the hardware and software on which the application is running.

A licence can be activated via the Upload licence page (Licensing/Home/Upload).

- When uploading a licence an Upload confirmation page will be displayed, which is an opportunity to compare the old and new licence.
- The uploaded licence is not activated until the user selects the Activate action.

6 Release 8.5.1.0

6.1 Shortcuts

The Toolbar preference is no longer used in TMS8. The TMS8 Dashboard page and Shortcut widget will display actions for features that the user has been granted access to via their TMS profile access rights tree (Maintain users).

6.2 Timesheet preferences

Timesheets no longer rely on the clock card preferences, now having a dedicated set of preferences purely for Timesheets. These can be accessed from System Preferences. Like other feature preferences, these can be defined at a System, Site, Profile and User level.

7 Release 8.6.0.0

7.1 Page runner

The Page runner will request each feature page (menu item) within the application and return a status to indicate if it is live (can be accessed) or dead (cannot be accessed due to an exception).
http://localhost/TMS8/admin/pagerunner.aspx
This is useful when installing or upgrading a site to quickly check for any basic feature errors. The following key is used:

- **Green** – the page is live, i.e. it can be accessed.
- **Yellow** – the logged in user does not have permission to access the page, e.g. employee trying to access a supervisor page.
- **Red** – the page is dead, i.e. it cannot be accessed.

Page runner

This page will test that each feature page (menu item) within the application is live, i.e. can be accessed. Each feature page will be requested in turn and a status indicating a success or failure will be displayed. This may take a while.

Page title	URL	Response time (sec)	Size (KB)	Status
Absence profile	http://localhost/800/Absence/Home/Index	1.157	85.11	OK
Accessibility statement	http://localhost/800/Help/Home/Accessibility	0.036	14.97	OK
Active language	http://localhost/800/Globalisation/Culture/Modify	0.308	9.00	OK
Add employee	http://localhost/800/AddEmployee/Home/Add			The remote server returned an error: (403) Forbidden.
Anomalies	http://localhost/800/ClockCard/Anomalies/Index?period=0&page=1&reload=True&singleEmployee=True	0.802	35.63	OK
Anomalies	http://localhost/800/ClockCard/Anomalies/Index?period=0&page=1&reload=True&singleEmployee=False	0.136	35.64	OK
Availability	http://localhost/800/Availability/Home/Index			The remote server returned an error: (403) Forbidden.
Badge history	http://localhost/800/Badges/Employee/Index			The remote server returned an error: (403) Forbidden.
Book absence	http://localhost/800/Absence/BookAbsence/Index	0.306	22.82	OK
Calendar maintenance	http://localhost/800/Calendars/Maintenance/Index			The remote server returned an error: (403) Forbidden.
Calendars	http://localhost/800/Calendars/Home/Index	0.069	8.85	OK
Calendars	http://localhost/800/Calendars/Group/Index			The remote server returned an error: (403) Forbidden.
CE	http://localhost/800/EmployeeDetails/View/Index?form=CE			The remote server returned an error: (403) Forbidden.
Change badge	http://localhost/800/AddEmployee/Home/Badge			The remote server returned an error: (403) Forbidden.
Change employee password	http://localhost/800/PasswordMaintenance/EmployeeChangePassword/Index			The remote server returned an error: (500) Internal Server Error.

Figure 10: Page runner output.

8 Release 8.7.0.0

8.1 System, site, profile and user preferences

All TMS System, site and user preferences can now be maintained in TMS8 (Mitrefinch server).

- The grouping of the preferences is now feature centric. For example, there is now a TAS preferences tab.
- Some preference titles have been changed either because there was no title or the title did not describe what the preference did.
- No IIS reset is required as preferences are refreshed on saving.
- Preferences can now be saved against a profile.

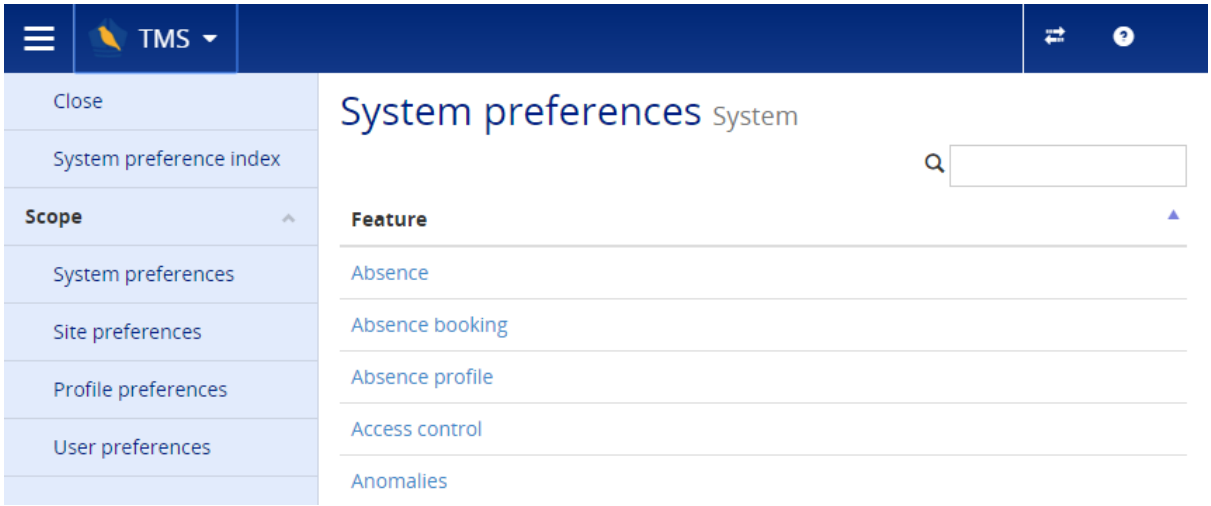


Figure 11: TMS8 preference home page.

To help match a TMS8 preference with the equivalent in WinTMS, when hovering over a preference on either platform the dB section and identifier for the preference will be displayed.

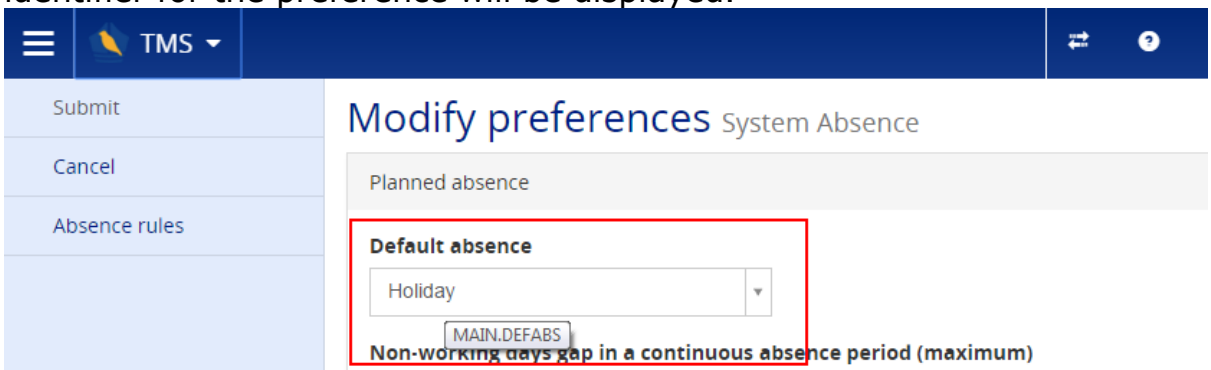


Figure 12:TMS8 preference hint.

TMS8 also contains a *System preference index* page, which:

- Lists all preferences including their section and identifier.
- Is searchable.
- Only displays preferences in the active scope.

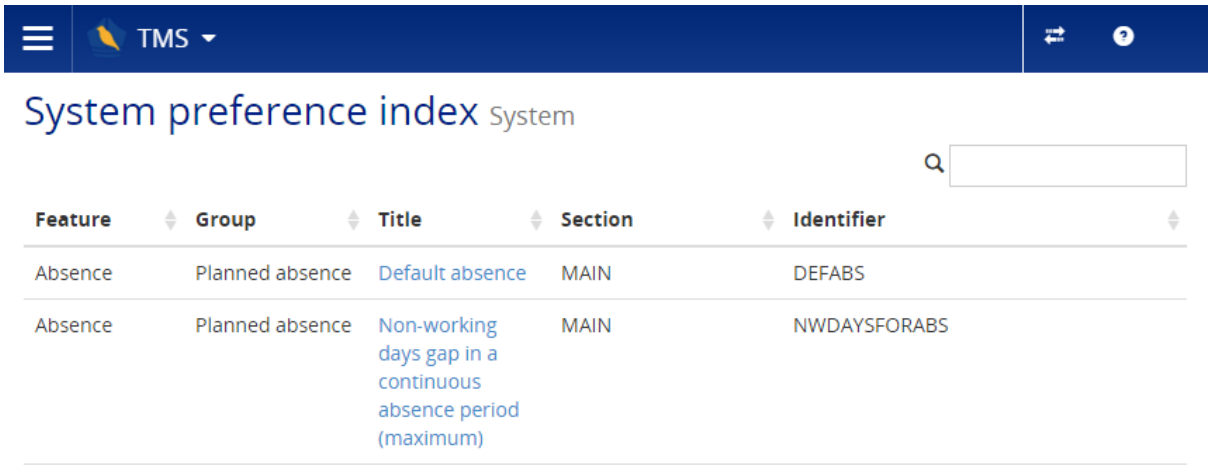


Figure 13: TMS8 preference index.

8.1.1 User preferences

When viewing a feature page that has associated supervisor preferences, a gear icon will appear in the top right of the page, which provides access to the maintenance page for those preferences.

Figure 14: TMS8 supervisor preference access from feature page.

8.1.2 Upgrade

To comply with TMS8 standards several preferences have been upgraded, see below.

Preference	Upgrade
Bradford factor start month (BRADFACT.STARTMONTH)	Was indexed from 0. Now indexed from 1.
Web clocking types (WEB.CLKTYPES)	Was a series of characters, e.g. [TD] represented TMS and TAS. Now a delimited list, e.g. [T,D]. ITMSGLOB.IDENT is now CLKTYPES8 to ensure TMS7 still works.
TAS group ID	Unique ID did not exist for a TAS group. Now each TAS group has a unique ID. ID stored in TASGROUPIDS%.
Advance selection fields	Advanced selection fields had no fixed ITMSGLOB.IDENT. They were a three digit number, e.g. 001. ITMSGLOB.SECTIONID is now 'INTERFACE'.
Advance selection fields FORMOPTIONSGRD	ITMGLOB.IDENT is now prefixed 'ADVGRID'.
Advance selection fields FORMOPTIONS	ITMGLOB.IDENT is now prefixed 'ADVSORT'.
Advance selection fields FORMOPTIONSSRT	ITMGLOB.IDENT is now prefixed 'ADVGROUP'.

Figure 15: TMS8 preference upgrades.

8.2 Toolbar

The WinTMS toolbar preferences are no longer used to determine the shortcuts that appear on the TMS8 Dashboard. The behaviour is now as follows:

- By default, all menu items that a user has access to will be displayed as shortcuts on the Dashboard.
- The Shortcut widget can be used to customise, and group, the shortcuts that appear on the Dashboard.

8.3 Quick actions

Pages containing tabular information will have an additional menu to aid in filtering, searching and navigation.

8.3.1 Search box

Entering text into the search box will filter table rows matching the search contents.

9 Release 8.7.2.0

9.1 ESS only licence key

An ESS only key can now be appended to the licence. When this key is present and true, all supervisors, including MASTER, will only have access to the following TMS8 web features:

- Admin (Page runner etc);
- Dashboard (no tabs);
- Licensing;
- Employee licensing;
- System preferences.

9.2 URL validation

A URL generated by the application will now include a checksum parameter. For example, see the Planned shifts modify URL below:
http://localhost/800/PlannedShifts/Home/Modify?shiftDate=2016-03-02%2006%3A00%3A00.000&existingShiftKey=FACTDAY&cs=1358978851
This checksum is appended to prevent URL tampering, i.e. it makes the URL read-only. For example, in the URL above the user will not be able to modify the shiftDate parameter.

- When the URL is requested in the browser a new checksum is generated from the given URL.
- When the new checksum equals the URL checksum the request is allowed to proceed.
- When the new checksum does not equal the URL checksum the request is rejected and a 403 Forbidden message is displayed.

9.3 Roster and Access group holder fields

In TMS7, the Roster and Access group holder fields were displayed as read-only inputs and buttons, see below. Selecting the button displayed a modal dialog that was used to change the value.

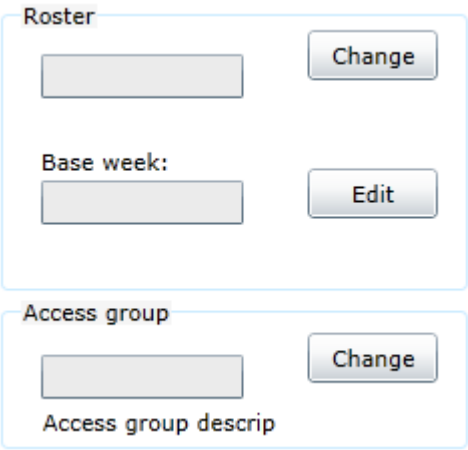


Figure 16: TMS7 Roster and Access group holder fields.

In TMS8, the Roster and Access group holder fields are now displayed as simple lookups.

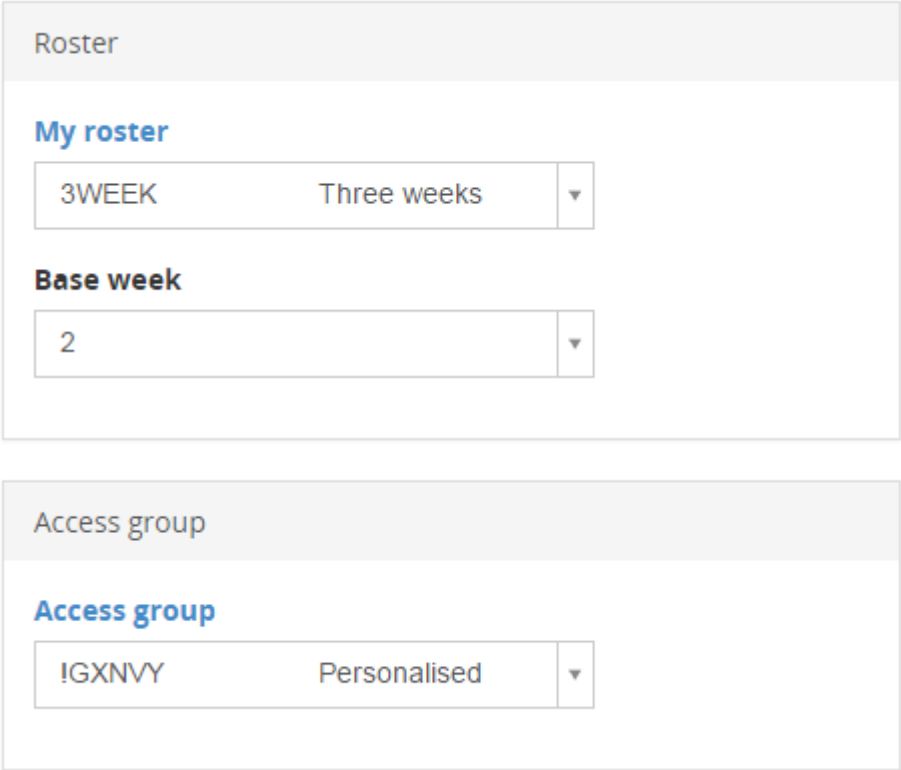


Figure 17: Roster and Access group holder fields.

10 Release 8.7.3.0

10.1 Error page 500 displays unique ID

When an exception occurs a friendly error page is displayed to the user. This page contains an entry ID that represents the error in the log.

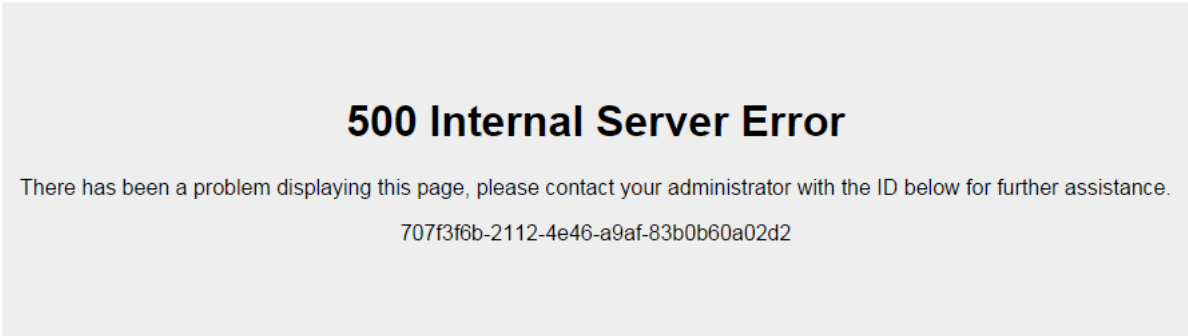


Figure 18: 500 error page contains unique ID.

This Entry ID can be used to find the exception details in the ELMAH log.

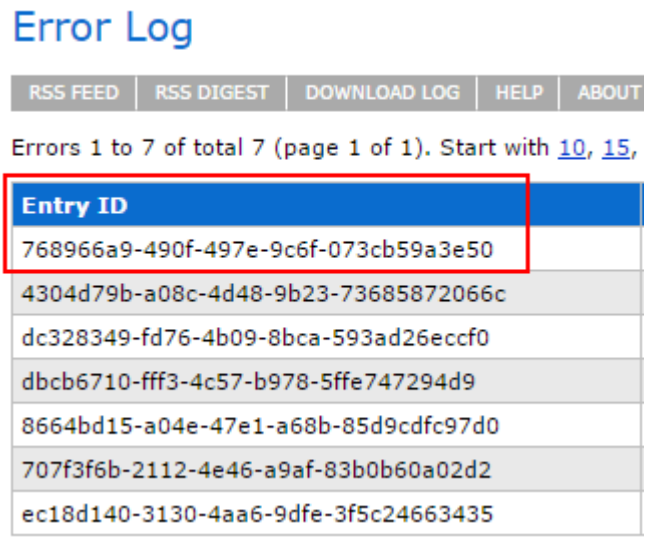
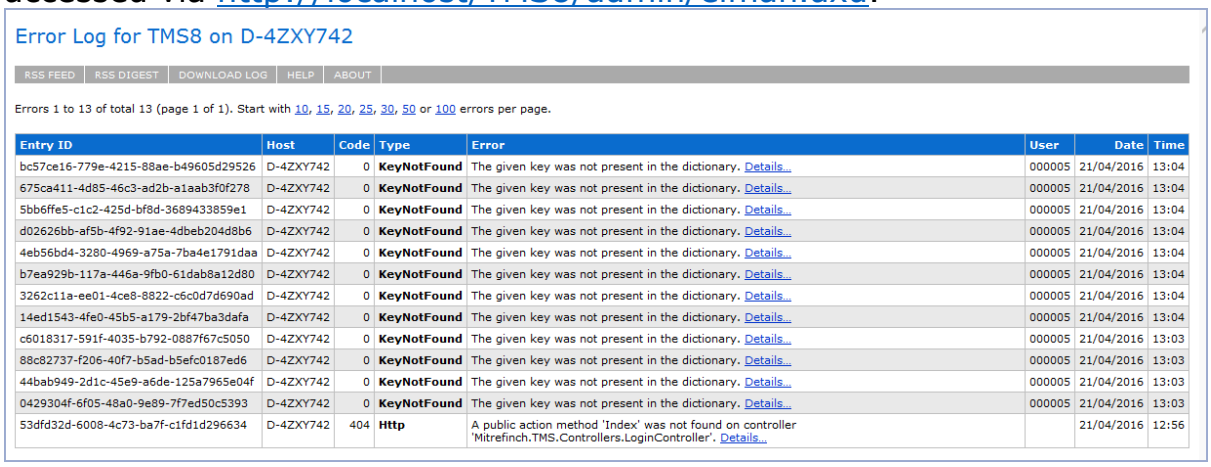


Figure 19: ELMAH log Entry ID field.

10.2 ELMAH log

The ELMAH logging facility has been added to this release. The log catches unhandled exceptions for Mitrefinch.TMS.Server and provides a web page to remotely view the full details of all logged exceptions.
The web page provided by ELMAH is called elmah.axd and resides at the root of the web application. It can be accessed via the Admin folder URL or directly. For example, in the screen shot shown below it is directly accessed via http://localhost/TMS8/admin/elmah.axd.



Entry ID	Host	Code	Type	Error	User	Date	Time
bc57ce16-779e-4215-88ae-b49605d29526	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
675ca411-4d85-46c3-ad2b-a1aab3f0f278	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
5bb6ffe5-c1c2-425d-bf8d-3689433859e1	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
d02626bb-af5b-4f92-91ae-4dbeb204d8b6	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
4eb56bd4-3280-4969-a75a-7ba4e1791daa	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
b7ea929b-117a-446a-9fb0-61dab8a12d80	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
3262c11a-ee01-4ce8-8822-c6c0d7d690ad	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
14ed1543-4fe0-45b5-a179-2bf47ba3dafa	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:04
c6018317-591f-4035-b792-0887f67c5050	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:03
88c82737-f206-40f7-b5ad-b5efc0187ed6	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:03
44bab949-2d1c-45e9-a6de-125a7965e04f	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:03
0429304f-6f05-48a0-9e89-7f7ed50c5393	D-4ZXY742	0	KeyNotFound	The given key was not present in the dictionary. Details...	000005	21/04/2016	13:03
53dfd32d-6008-4c73-ba7f-c1fd1d296634	D-4ZXY742	404	Http	A public action method 'Index' was not found on controller 'Mitrefinch.TMS.Controllers.LoginController'. Details...		21/04/2016	12:56

Figure 20: ELMAH exception log.

In the Error field it can be seen that the unique ID has been appended to the Error message. The top menu also provides functionality for downloading the log of errors in a CSV file which can be viewed in Microsoft Excel.
Alternatively, if the user has access they can go to the folder on the server where the output files are stored and find the appropriate file.

10.3 Admin pages secured by role

Access to the Admin directory and sub-pages is now controlled via Roles. There are two roles: Employee and Supervisor. By default, access to the Admin directory and sub-pages is restricted to the Supervisor role, i.e. employee access is denied.
Security on the Admin directory can be maintained via web.config and, if required, can be locked down to specific users.
Access to Admin/Info.aspx is still granted to all unauthenticated users by default, but still requires a server-side and client-side PIN to be input. Unauthenticated access is needed because features, such as the Login page, may be failing when this page is required.

11 Release 8.8.0.0

11.1 Filters

Some pages have options to filter what information is displayed. For example, the Requests page allows the user to choose the types of request to display. Where these options are available you will find that they have been moved to a Filters page.
On a desktop the Filters page can be launched via a QuickAction in the top right.

Figure 20: Desktop filter action.

On a mobile device the Filters page can be launched via a QuickAction in the bottom right.

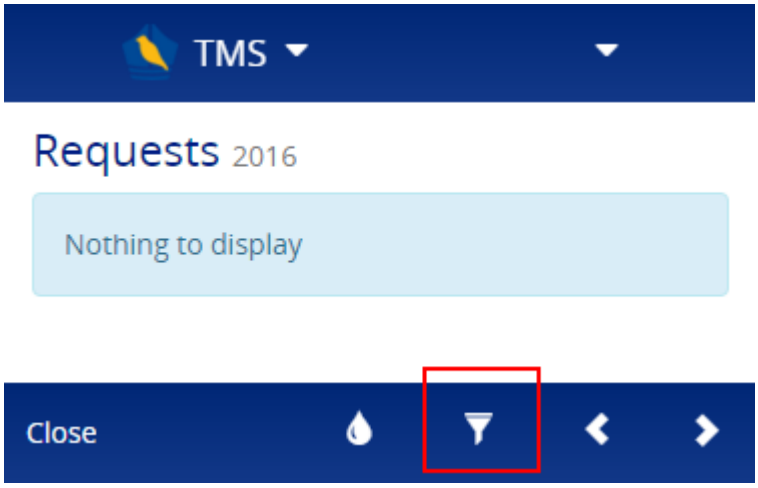


Figure 21: Mobile filter action.

The modal page will then give you access to all of the options that can be toggled.

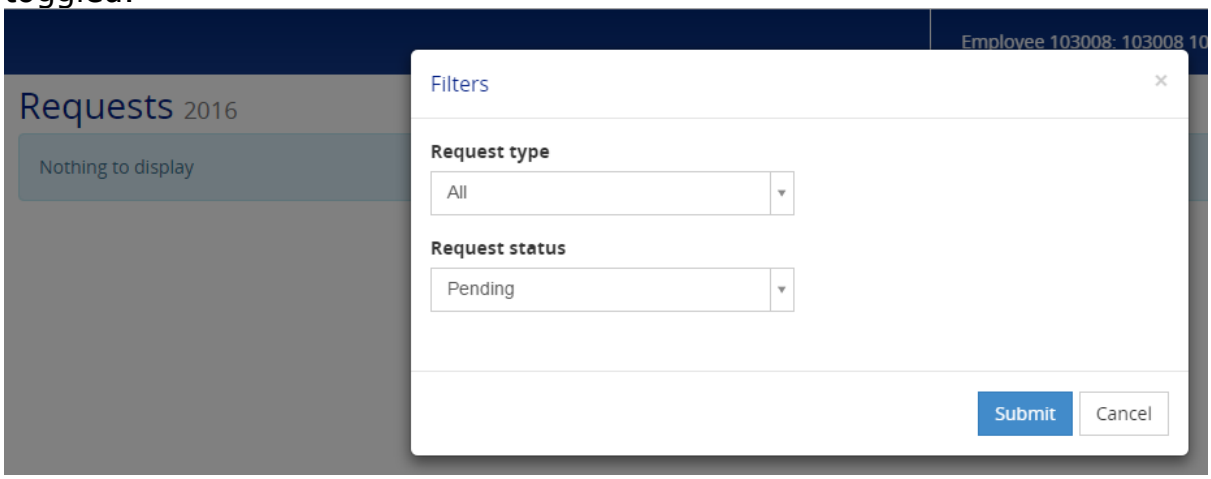


Figure 22: Requests filter page.

12 Release 8.09.0.0

12.1 Calendar

This release of the Calendars feature contains significant updates, which are detailed in this section. An overview of the changes can be seen in the annotation below.

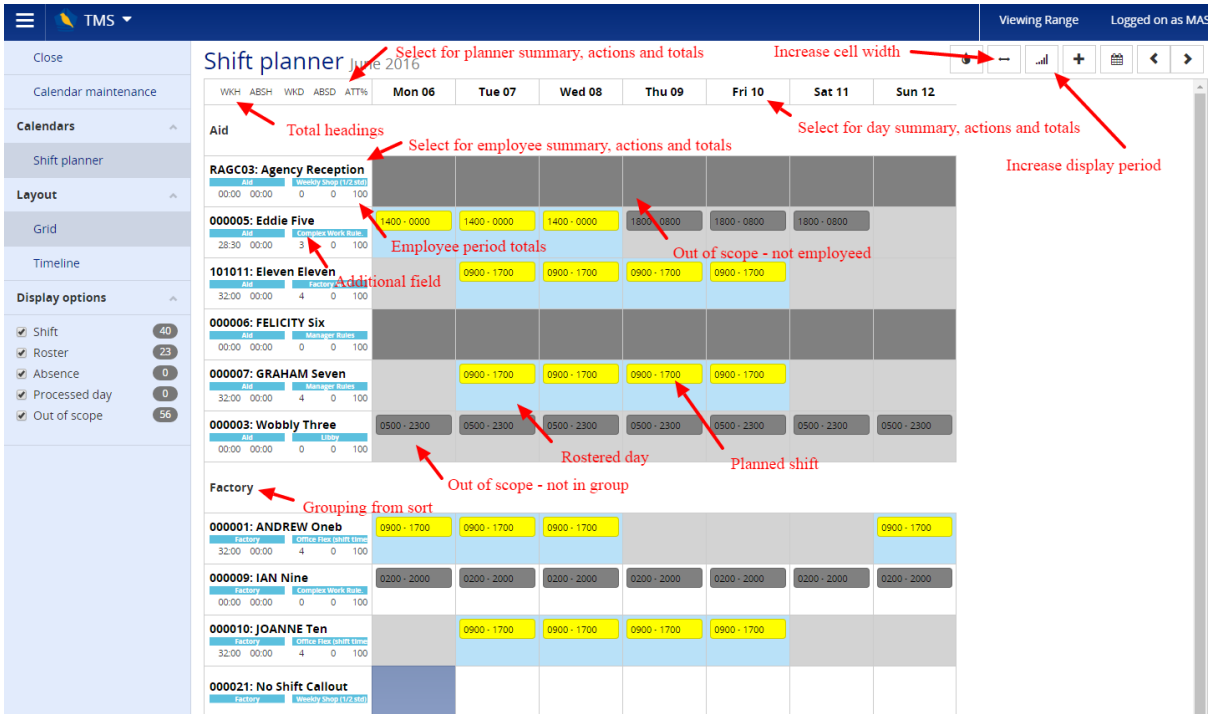


Figure 23: Calendar overview.

12.1.1 Preferences

Some Future work planner preferences have been re-categorised as Calendar preferences, which can be accessed via the System preferences Calendar feature. When displaying any calendar group layout these preferences will be applied, and include:

- Additional field 1.
- Additional field 2.
- Employee sort order.
- **Display headers for sort fields** – employees will be grouped by the first Employee sort order and a header will be displayed for each grouping. For example, group by department.

12.1.2 Shift data type

A calendar Shift data type is now available, which is used to display planned shifts. In addition to the visual display, the following Group planner actions are available:

- Employee actions.
  - **Planned shifts** - view planned shifts.
- Employee-day actions.
  - **Insert shift** - supports inserting of shift on each selected day.
  - **New shift** - supports inserting of a shift with custom start and end times on each selected day.
  - **Revert to roster** - remove all non-roster shifts that start on each selected day.

- Shift actions.
    - **Modify shift** - input a custom start and end time for the shift.
    - **Delete shift** - remove the planned shift.
    - **Change shift** - replace this shift with another.
    - **Overtime** - preauthorise overtime.

These actions are secured against the existing WinTMS Future work planner access rights.

12.1.3 Roster data type

A calendar Roster data type is now available, which is used to display rostered days. In addition to the visual display, the following Group planner actions are available.

- Calendar actions.
    - **Copy periods** - copy the planned shifts on display forward into the future.
- Employee actions.
    - **Create named roster** - create a named roster from the selected employee's planned shifts on display.
    - **Create personal roster** - create a personal roster from the selected employee's planned shifts on display.
- Employee-day actions.
    - **Change roster** - change the roster assigned to the employee.
    - **Copy period to** - copy the selected employee's planned shifts on display to other employees.
- Roster actions.
    - **Change roster** - change the roster assigned to the employee.

These actions are secured against the existing WinTMS Future work planner access rights.

12.1.4 Out of scope data type

The out of scope data type is used to highlight days on which an employee is not working for you. There are two states:

- Not employed
    - The employee does not work for the company, e.g. they are not started or they have left.
    - Highlighted with dark grey background colour.
- Not in group
    - The employee works for the company, but not in one of your departments.
    - Highlighted with light grey background colour.

12.1.5 Standard hour totals

This release supports totals based on shift standard hours. Totals can be activated via the Calendar maintenance feature. The following totals are available:

- Standard work hours.
  - Sum of planned shift standard hours.
  - Requires shift data type.
- Planned work days.
  - Sum of distinct days that contain a planned shift.
  - Requires shift data type.
- Planned absence days.
  - Requires the absence data type.
- Standard absence hours.
  - Sum of shift standard absence hours during planned shifts.
  - Requires the shift and absence data type.
- Planned attendance (%).
  - Percentage of work days on which there is no absence.
  - Required the shift and absence data type.

12.1.6 Group layouts

The following group layouts are available: Grid and Timeline.
The grid layout will display in a report format in which each item will fill the cell width, see below.

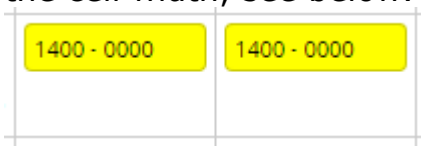


Figure 24: Grid layout.

The timeline layout will display items relative to their start and end times, see below.

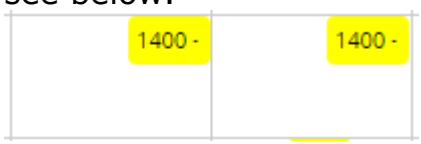


Figure 25: Timeline layout.

12.1.7 Group planner

A Group planner feature has been implemented, which includes the following data types: Out of scope day, Roster, Processed day, Shift and Absence. The Employee planner has been updated to match this.
Other combinations of data, such as Requests, can be displayed by creating a custom calendar.

13 Release 8.09.1.0

13.1 Timesheet – display hours codes that have not been selected

The Timesheet features will now display hour codes that have not been configured for display if they are contained in the work record. This means that the user can see codes configured for display + codes in the work record.

13.2 Timesheet – mass change hours

The Timesheet hours feature now contains two additional actions:

- Add worked hours;
- Add absence hours.

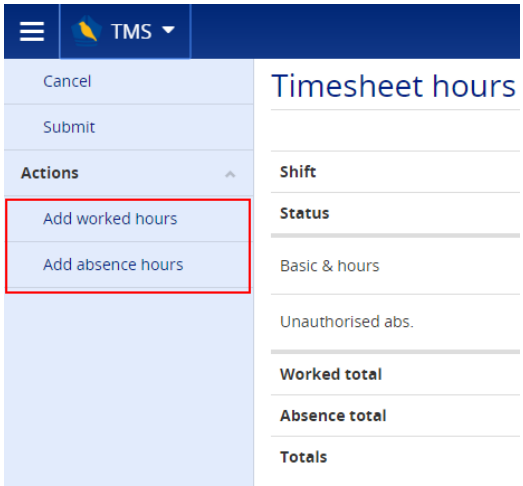


Figure 26: Timesheet add hours actions.

These actions allow the user the user to do the following:

- Assign hours to a specific code across many shifts.
- Assign hours to a code that does not appear on the Timesheet by default.

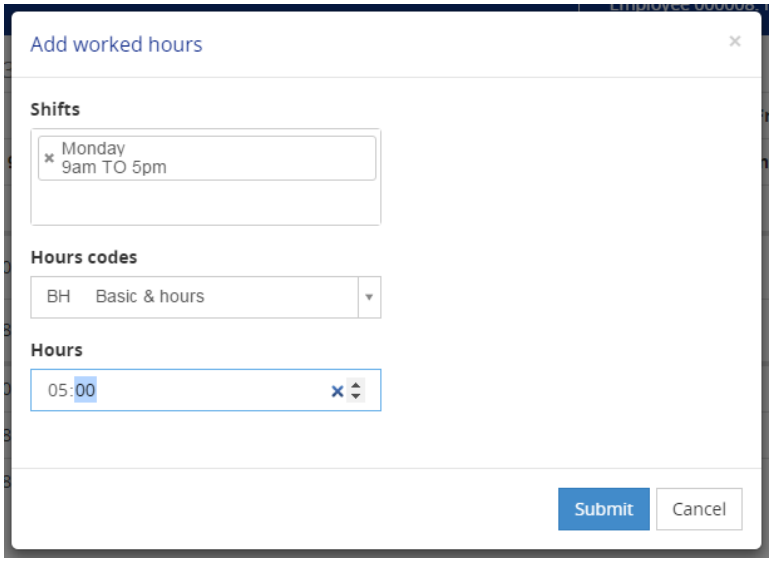


Figure 27: Add worked hours page.

14 Release 8.09.2.0

14.1 Quick clock actions

The Clock in and Clock out actions will now clock immediately and will not redirect to another page, under the following conditions:

- The active employee is allowed to clock;
- The system preference Time zone offset is not set to Client time zone.

And in mobile:

- An employee is logged in;
- The employee is allowed to clock.

A message will be displayed to indicate a successful clocking.

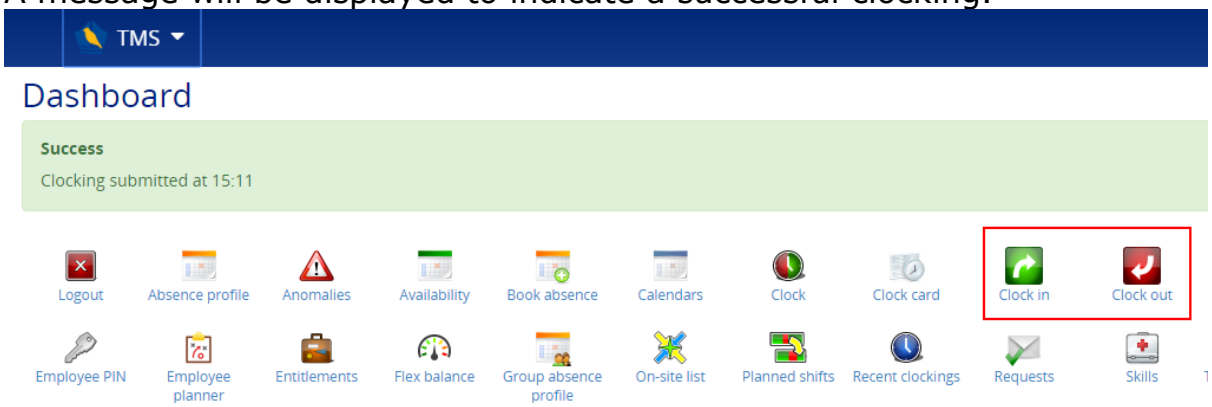


Figure 28: Quick clock in or out success.

The Clock action can be used to clock with additional information, such as: date time, site or keyed absence.

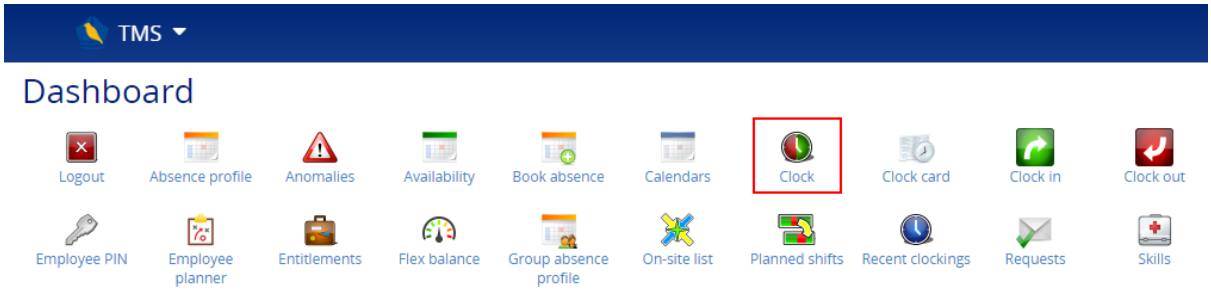


Figure 29: Additional clock action.

14.2 Widget title and style optional

The widget Title and Style are now optional.

14.2.1 Empty header

The widget Title is now optional, leave it empty and no header will be displayed. Note, when viewing Dashboard maintenance an *<untitled>* header will be displayed.

14.2.2 No border

The widget Style can now be set to None, which when chosen will not render a border around the widget.

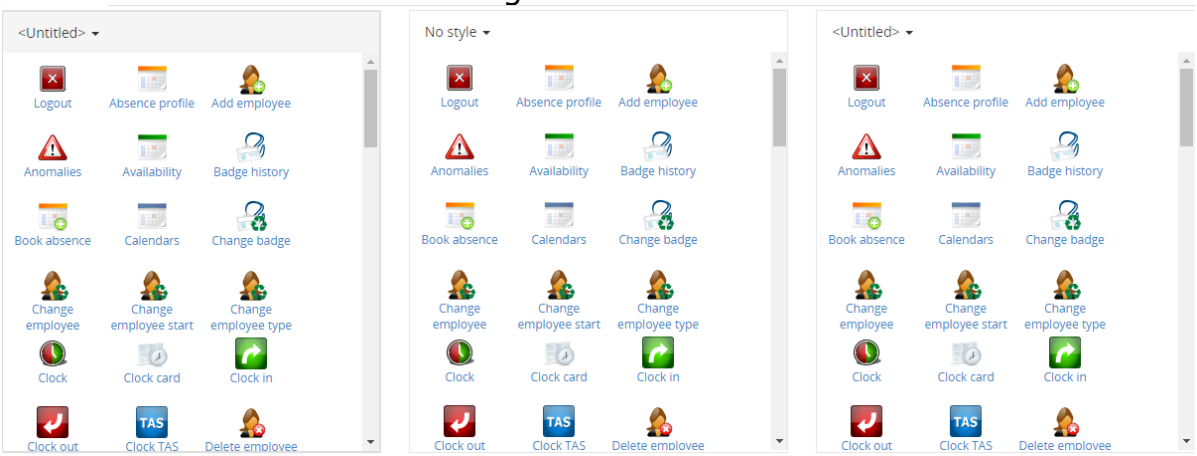


Figure 30: Dashboard maintenance widgets with no Title, no Style and no Title or Style.

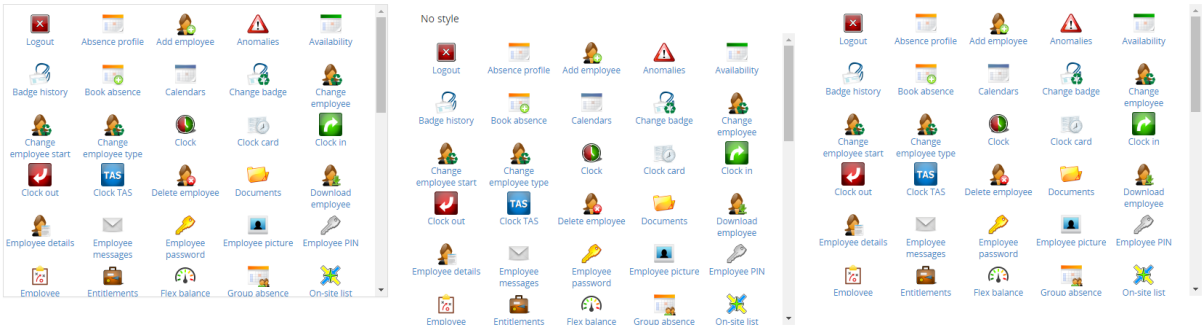


Figure 31: Dashboard widgets with no Title, no Style and no Title or Style.

14.3 Shortcut widget size

The Shortcut widget can now be assigned an icon size: small, medium or large. The default size is small.

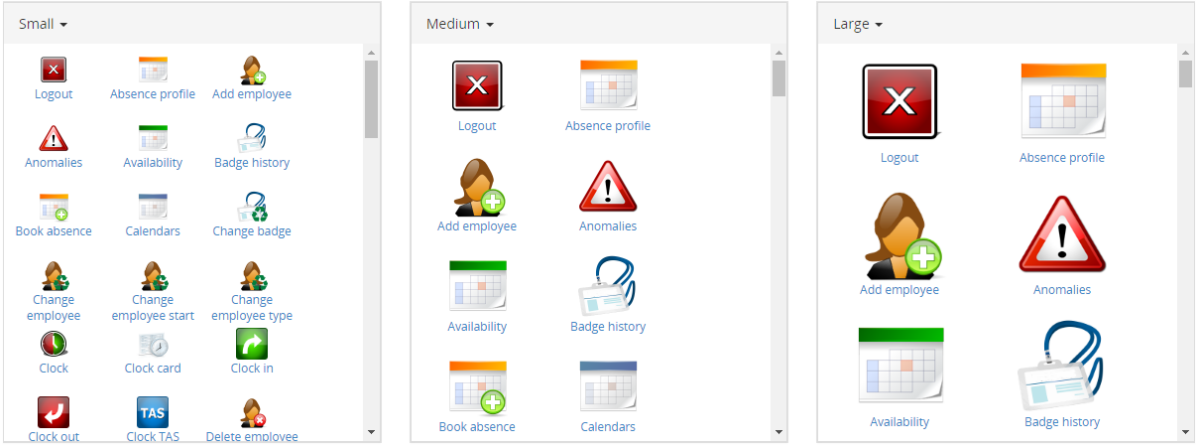


Figure 32: Shortcut widget icon sizes.

15 Release 8.09.3.0

15.1 Anomalies drag and drop

The Anomalies feature now allows a Supervisor or Employee to drag and drop hour code values into other hour code values to resolve anomalies. For example, a Supervisor can click and hold an Employees Early leaving (E) absence hours code. A shadow tag will appear:

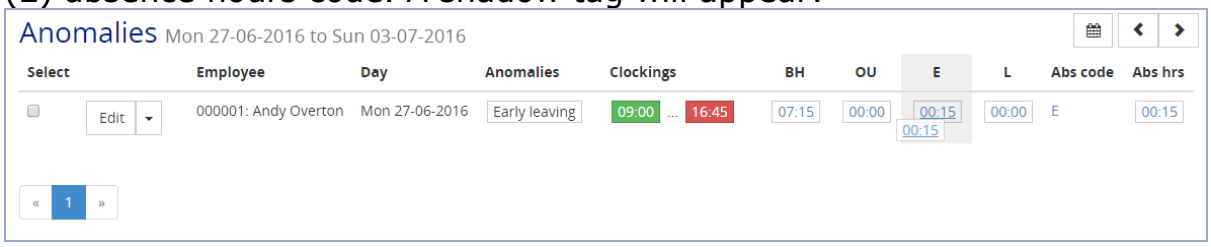


Figure 33: Dragging an hours code.

Dragging the value means the shadow tag will follow the cursor. Release the mouse button when the cursor is aligned over the centre of the new column. The value is removed from the original column and added to the new column. In the example below, the Early leaving (E) hours code value is moved into the Overtime (OU) hours code column, resolving the Early leaving anomaly:

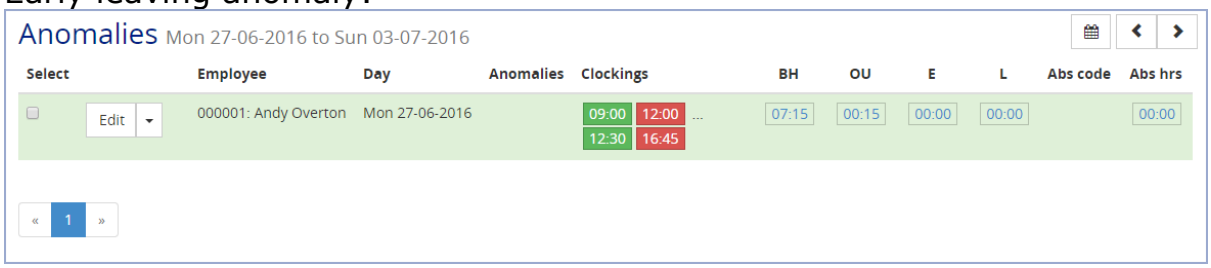


Figure 34: Dropping an hours code to resolve an anomaly

If you drag a value to a column which already contains a value they will be added together.

Moving an hours code into a column with more than one hours code (Additional hours, Additional absence or Abs hrs columns) will open a pop-up with a drop-down list to select the new hours code to use:

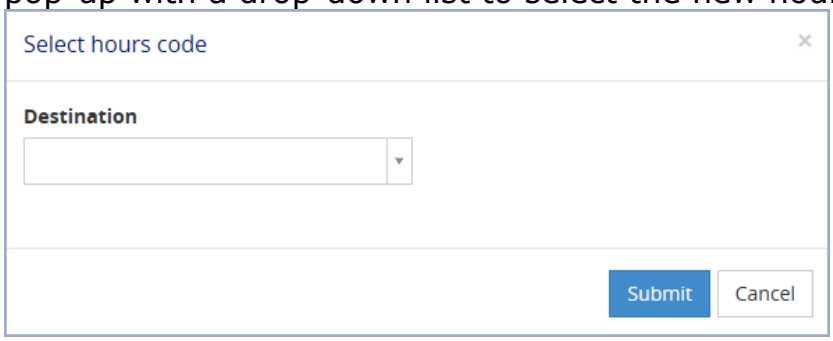


Figure 35: Select hours code pop-up

The new hours code value will be added to the same hours code if it already exists or it will add the new hours code to the appropriate column.

16 Release 8.10.0.0

16.1 Package validator

The Package validator will check the validity of the TMS package/database by inspecting form, panel and table associations. Use this to check for common data issues, such as those listed below.
http://localhost/TMS8/admin/packagevalidator.aspx

Message	Description
Multiline table with history	A multiline table can contain many records for a single employee. A multiline table is denoted by the existence of the AUTOKEY field. A field from a multiline table must not be assigned to track history.
Single panel assigned multiline table	A single panel can only display one record for an employee. A single panel must be associated with a single line table.
Multiline (grid) panel assigned single table	A multiline grid displays a list of records for a single employee. A single table can only contain a single record for each employee. A multiline grid must be associated only with a multiline table.

Figure 36: Page validator messages.

16.2 Timesheet – Save as draft preference

In **System preferences > Timesheet** a preference called 'Display Save as draft action' has been added to display or hide the 'Save as draft'

option available to Employee's using Timesheets. Like other feature preferences, these can be defined at a System, Site and Profile level.
Note: the 'Save as draft' action is now hidden by default.

16.3 Clock card drag and drop

The Clock card feature now allows a Supervisor or Employee to drag and drop hour code values into other hour code values to resolve anomalies or to modify work records. For example, a Supervisor can click and hold an Employees Lateness (L) absence hours code. A shadow tag will appear:

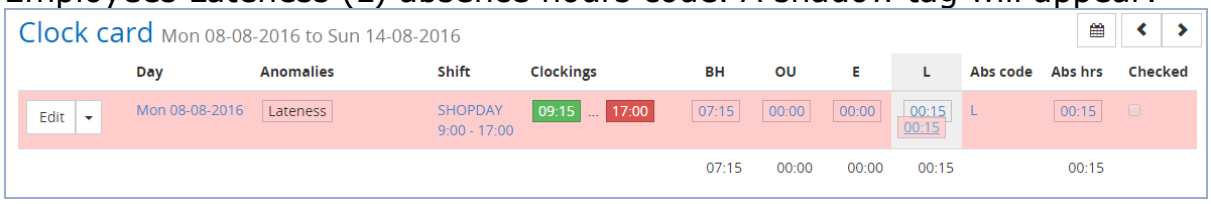


Figure 37: Dragging an hours code.

Dragging the value means the shadow tag will follow the cursor. Release the mouse button when the cursor is aligned over the centre of the new column. The value is removed from the original column and added to the new column. In the example below, the Lateness (L) hours code value is moved into the Overtime (OU) hours code column, resolving the Lateness anomaly:

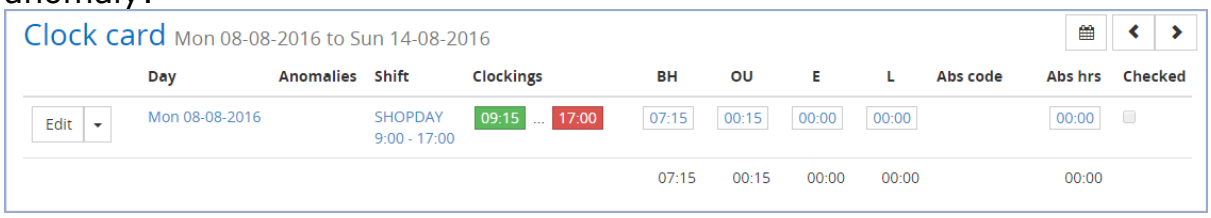


Figure 38: Dropping an hours code to resolve an anomaly

If you drag a value to a column which already contains a value they will be added together.
Moving an hours code into a column with more than one hours code (Additional hours, Additional absence or Abs hrs columns) will open a pop-up with a drop-down list to select the new hours code to use:

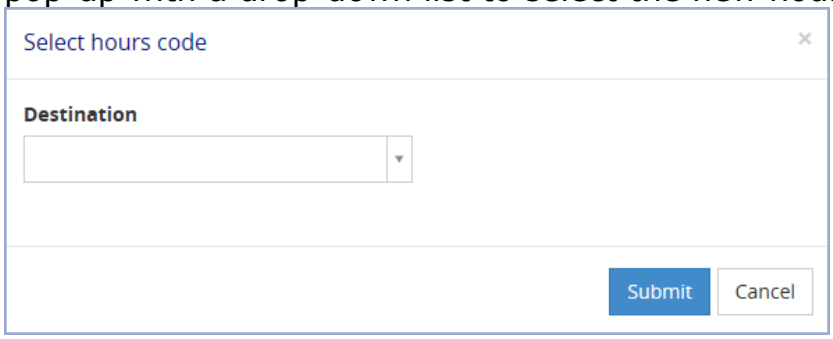


Figure 39: Select hours code pop-up

The new hours code value will be added to the same hours code if it already exists or it will add the new hours code to the appropriate column.

17 Release 8.10.1.0

17.1 Planner costing totals

The default TMS8 Employee planner and Group planner display Standard hour totals, which are quick to calculate. A new set of costing totals have been introduced:

- These are the planner totals from TMS7.
- They are calculated from work records, so take longer to produce.
- They are only available via the Calendar work record data type, i.e. you must create a custom calendar to display them.
- They are only available on custom calendars with a grid or timeline layout

The table below shows the available costing totals. All long and short names can be customised via the Language maintenance feature.

TMS8 Long name	TMS8 Short name	TMS7 name
Actual absence	Actual abs	Absence
Actual pay	Actual pay	Worked pay
Actual work	Actual work	Worked hours
Planned absence	Plan abs	Planned absence
Planned attendance %	Plan att %	Employee percentage
Planned break budget	Plan break	Planned break budget
Planned work days	Plan days	Employee count
Planned pay	Plan pay	Planned pay
Planned work	Plan work	Planned hours

Figure 40: Costing totals.

18 Release 8.11.0.0

18.1 LDAP Authentication

TMS now includes support for LDAP authentication. This can be enabled and configured in the login preferences, and can be customised per profile.
To use this feature you will require access to an LDAP server, and the relevant connection details to connect TMS to it. Please see the LDAP authentication document for more details.

18.2 TMS Outlook Add-in desktop mode

The TMS Outlook Add-in can now display the 'desktop' version of TMS, as opposed to the mobile version. This will allow the add-in to be used in more complex authentication scenarios that it currently does not support, such as Active Directory or LDAP authentication.

To enable this mode, open Outlook and navigate to the options screen for the Mitrefinch Add-in, and check the **Use desktop version of TMS** option.

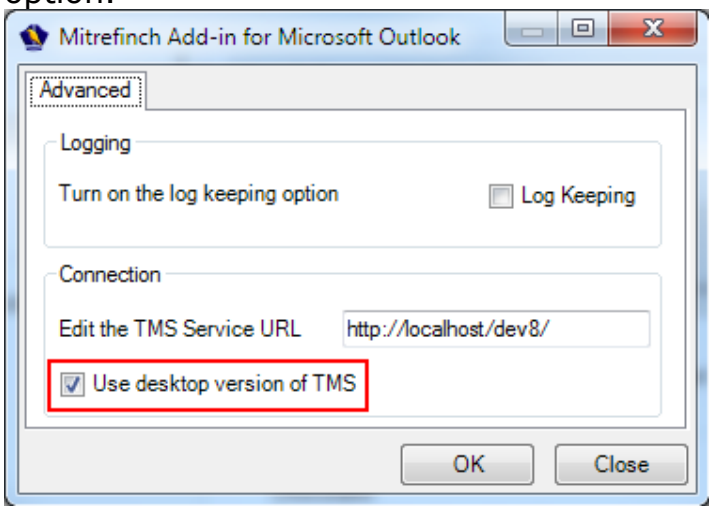


Figure 41: Mitrefinch Add-in options

Note that pages displayed in this mode may not be as well suited to the narrow display used by default in Outlook. If this is a problem, the size of the Add-in can be increased, or disable the desktop version to return to the default layout.

18.3 Theme

Additional options have been added to the **Theme** feature to allow a Supervisor to create their own custom themes and upload an image to be used as a Dashboard background.

18.3.1 Create a custom theme

A Supervisor can create a new custom theme and define the colour of the Header bar and TMS menu, Navigation and details pane and Text headings.

To create a custom theme, navigate to the Theme feature and select the quick action in the top-right corner to open the Create theme page:

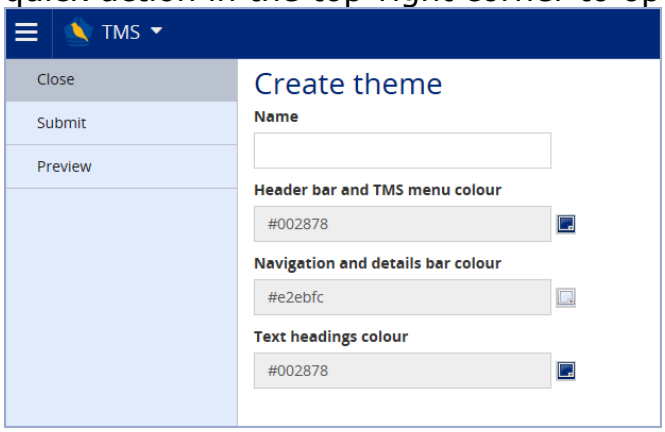


Figure 42: Create theme page

The custom theme can be previewed before being submitted. Once submitted, it'll appear in the list on the main Theme page and can be set as an Active them for an Employee or Supervisor.

18.3.2 Dashboard background

A Supervisor can upload an image to be used for the background for Employee and Supervisor Dashboards.
To upload a background image, go to the Theme feature and select Dashboard background in the left-hand pane:

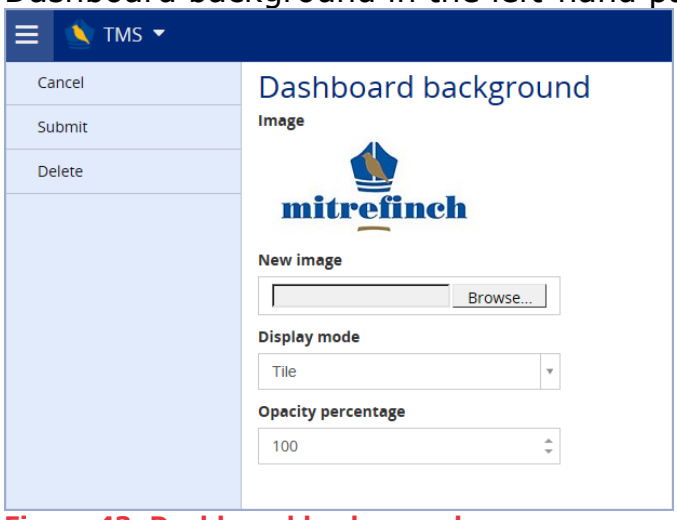


Figure 43: Dashboard background page

The Display mode setting determines how you want the background image to be displayed:

- **Centre** - the uploaded image will be displayed in the centre of the page
- **Stretch** - the upload image will be stretched, in order to fit the full width of the page
- **Tile** - the image will be tiled across the page

The Opacity percentage determines the opacity of the image, which can be set anywhere between 1 – 100%.
Note: The maximum file size for an image is 2mb and only .png, .jpeg and .bitmap are supported file formats.

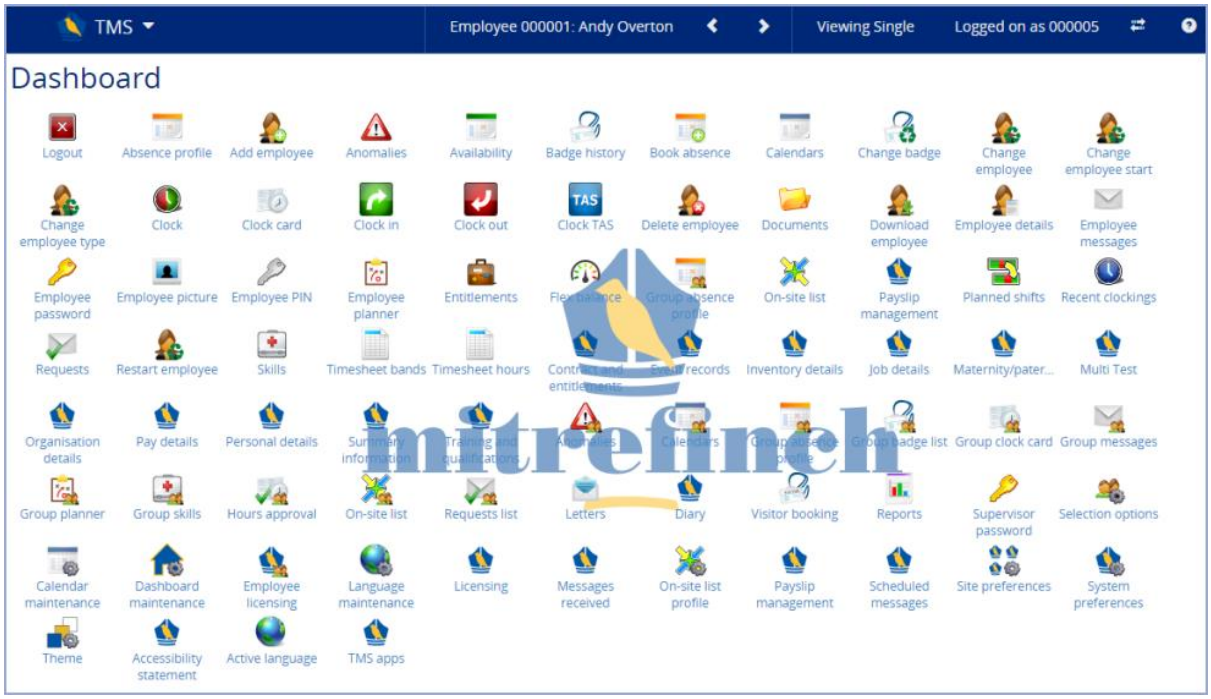


Figure 44: A Dashboard with a background image

19 Release 8.11.1.0

19.1 Reset password functionality

19.1.1 Preference to prevent supervisors entering employee passwords

A new preference has been added to make it possible to prevent supervisors from manually entering new passwords for employees.

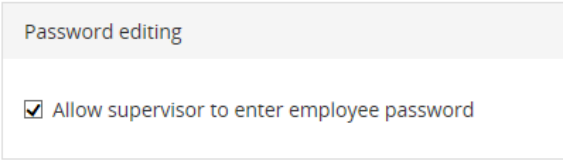


Figure 45: Password editing preference

The new option **Allow supervisor to enter employee password** is enabled by default, meaning that when a supervisor navigates to the **Change employee password** screen, they are able to type in the new password for the employee account.
If the option is disabled, then supervisors will only be able to reset employee passwords, generating a new password automatically which will be emailed to the employee. They will not be shown the new password, preventing them from logging in as the employee and impersonating them.

19.1.2 Reset employee password

A new option has been added to automatically generate a new password for an employee, and email it to them. When navigating to the **Change employee password** screen, a new option is available in the side panel named **Reset password**.

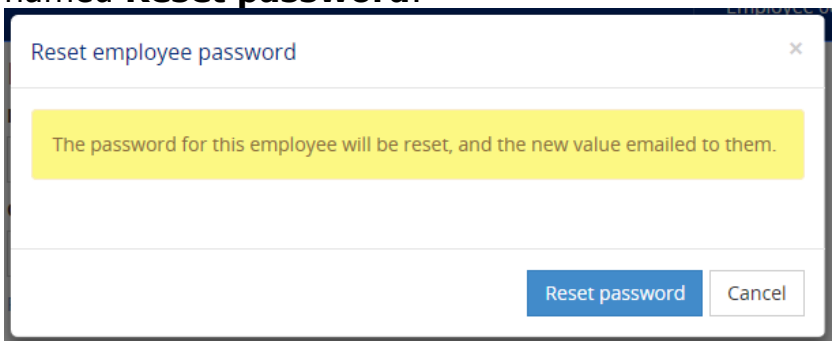


Figure 46: Reset password confirmation modal

Selecting this option will show a warning, as shown above, and actions to reset the password, or cancel. If the **Reset password** action is chosen, a new password will be generated for the employee, and emailed to the email address associated with their TMS account.
The new password will be a **single use password**. The employee will be prompted to change this the next time they log in.
Where email is not configured in TMS, or the employee does not have an email address defined, then TMS will be unable to send the email, so this feature will not be available.
If the preference **Allow supervisor to enter employee password** is disabled, then when a supervisor navigates to the **Change employee password** screen, they will be taken directly to the **Reset employee password** screen instead.

19.1.3 Mass reset of passwords

25/10/2018 Please note that this functionality was removed in release 8.25.4. Please review section 56.1 for further information
A new option has been added to allow a supervisor to automatically generate a new password for a group of employees at once.
When the **Reset passwords** action is chosen from the **Mass change** section of the TMS menu, the current employee selection will be used to select a group of employees, and display them on screen. To change the employees displayed, use the normal group selection tools.
If the password for an employee cannot be reset (for example, they don't have an email address defined), they will show as disabled with an appropriate error message.
Select the **Submit** action to start resetting the passwords for all other employees. The operation may take some time, but results will be updated while it is in progress.

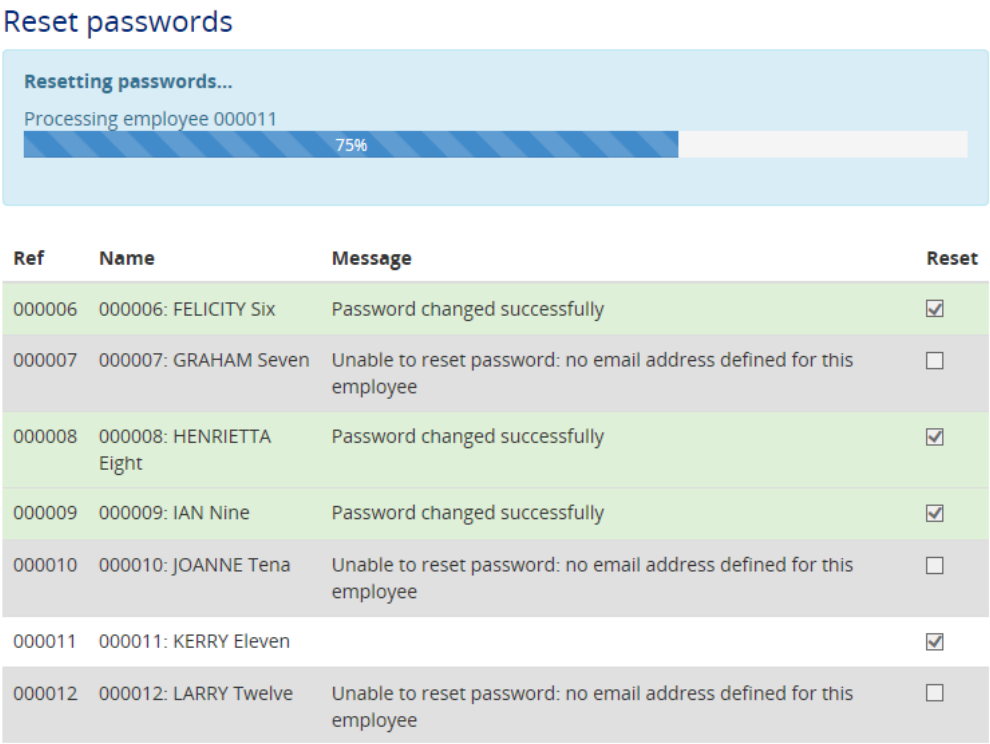


Figure 47: Progress bar appears at the top of the page

When a password has been successfully reset, a success message will be shown and the row highlighted green, and the employee will receive an email containing their new password. The new password will be a **single use password**, and the employee will be prompted to change this the next time they log in.
If a password could not be reset for any reason, the row will be highlighted in red and an error message displayed.

19.1.4 Mass import of passwords

The IMPORT.EXE Windows application can now be used to import employee passwords into TMS from a file on disk.
To do this, map the column containing your password data to import into **TMSTMS.DETAILS**. A warning message will be displayed on saving the import definition.

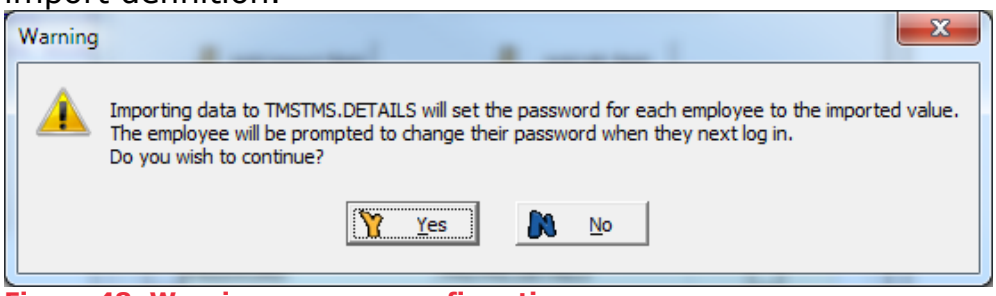


Figure 48: Warning message confirmation

The passwords must be stored in the import file in plain text, which will be hashed according to the TMS encryption settings when it is imported into the TMS database. Each password will be imported as a **single use**

password, and the employee will be prompted to change this the next time they log in.
Where storing passwords in plain text in the import file is unacceptable, the mass reset option above provides an alternative mechanism of setting initial passwords for each employee.

20 Release 8.11.2.0

20.1 Unapprove Hours

The Unapprove button has now been turned into a setting that is configurable in the Modify Preferences section. By default this will be set to one, meaning that the Unapprove button is active on the page.

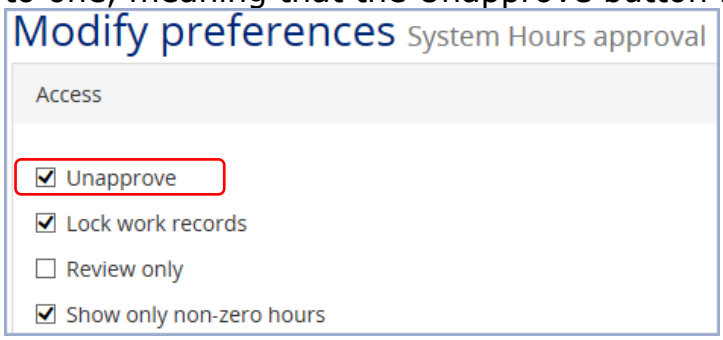


Figure 49: Hours approval preferences page

20.2 Lock/Unlock Employees' Accounts

Supervisors are able to lock and unlock employees' accounts. This is done by navigating to the **Employee password** section of the system and then selecting either Lock or Unlock from the list of action buttons in the left-hand pane. When an account is locked, employees will not be able to log into their accounts, despite using the correct username and password combination.

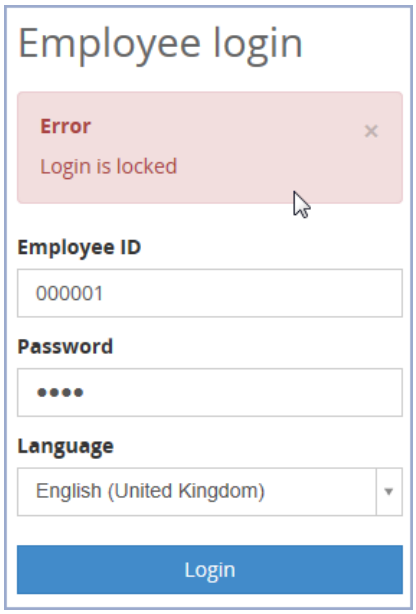
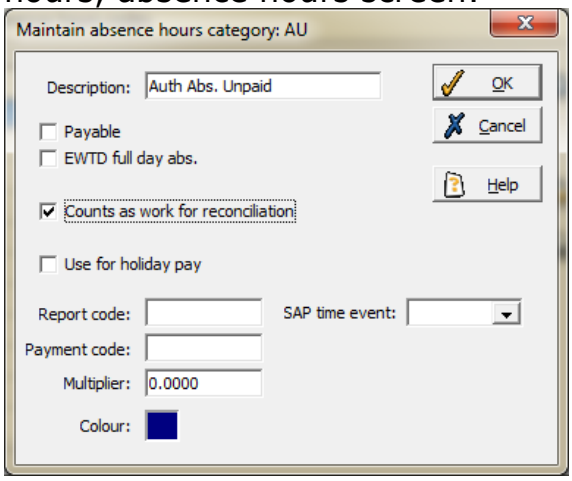


Figure 50: Error message when login is locked

21 Release 8.11.4.0

21.1 WRABSRECON

A new identifier WRABSRECON has been added to the software, this reports on the amount of absence hours taken on a day where the 'Counts as work for reconciliation' box is ticked in System, maintain hours, absence hours screen:



21.2 New Pre-Processing functions

Two new pre-processing functions have been added to the software.

PPWSCLEARRATES

This function clears any values within the rates of the shift. It takes one parameter to specify which rates this function applies to (Before Workday, During Workday and After Workday).

E.g. Clear the rates against the 'During Workday' part of the shift.

;PREPROCESS
PPWSCLEARRATES['M']:='Y'
;ENDPREPROCESS

PPWSSETRATES

This function sets the value of a rate within the rates of the shift. It takes two parameters to specify which rates this function applies to and the start time to apply this rate from.

E.g. Set the rate during a shift upto 13:00 to LOW hours code, and after 13:00 to HIGH hours code

;PREPROCESS
PPWSCLEARRATES['M']:='Y'
PPWSSETRATES[0,'M']:='LOW'
PPWSSETRATES[780,'M']:='HIGH'
;ENDPREPROCESS

22 Release 8.12.0.0

22.1 Web config changes

The following new entries are required to allow the Kiosk and Enroller to function:

```
<configuration> …
  <location path="admin">
    <system.webServer>
      <defaultDocument>
        <files>
          <add value="index.html" />
        </files>
      </defaultDocument>
    </system.webServer>
  </location>
  <location path="tServiceConfigHandler.ashx">
    <system.web>
      <authorization>
        <allow users="*" />
      </authorization>
    </system.web>
  </location>
  <location path="tCloudKioskInstallHandler.ashx">
    <system.web>
      <authorization>
        <allow users="*" />
      </authorization>
    </system.web>
  </location>
  <!-- Configuration for the imported Mitrefinch.TMS.Web.Services -->
```

The following has been added to improve web services terminals and kiosk communication:

```
<behaviors>
    <serviceBehaviors>  …
        <behavior name="noThrottleBehavior"><serviceThrottling
maxConcurrentCalls="1000" maxConcurrentSessions="10000"
maxConcurrentInstances="1000" /></behavior>
```

and

```
<services>  …
    <service
name="Mitrefinch.TMS.Server.Services.WCF.tTerminalService"
behaviorConfiguration="noThrottleBehavior" />
    <service
name="Mitrefinch.TMS.Server.Services.WCF.tCloudKioskService"
behaviorConfiguration="noThrottleBehavior" />
```

22.2 Kiosk client

The kiosk client (previously known as 'Cloud kiosk') has been migrated to TMS8. The employee facing UI has been updated to match the TMS8 standard user interface. The 'Next gen' mode has been removed and now only a single configuration is allowed. When upgrading clients who have an existing TMS7 cloud kiosk installation, the first configuration will be used by TMS8 and all other configurations will be ignored. No other new functionality has been added.

TMS7 cloud kiosk is not compatible with TMS8. All TMS7 cloud kiosks must be individually upgraded to TMS8 kiosks before connecting to the TMS8 server.

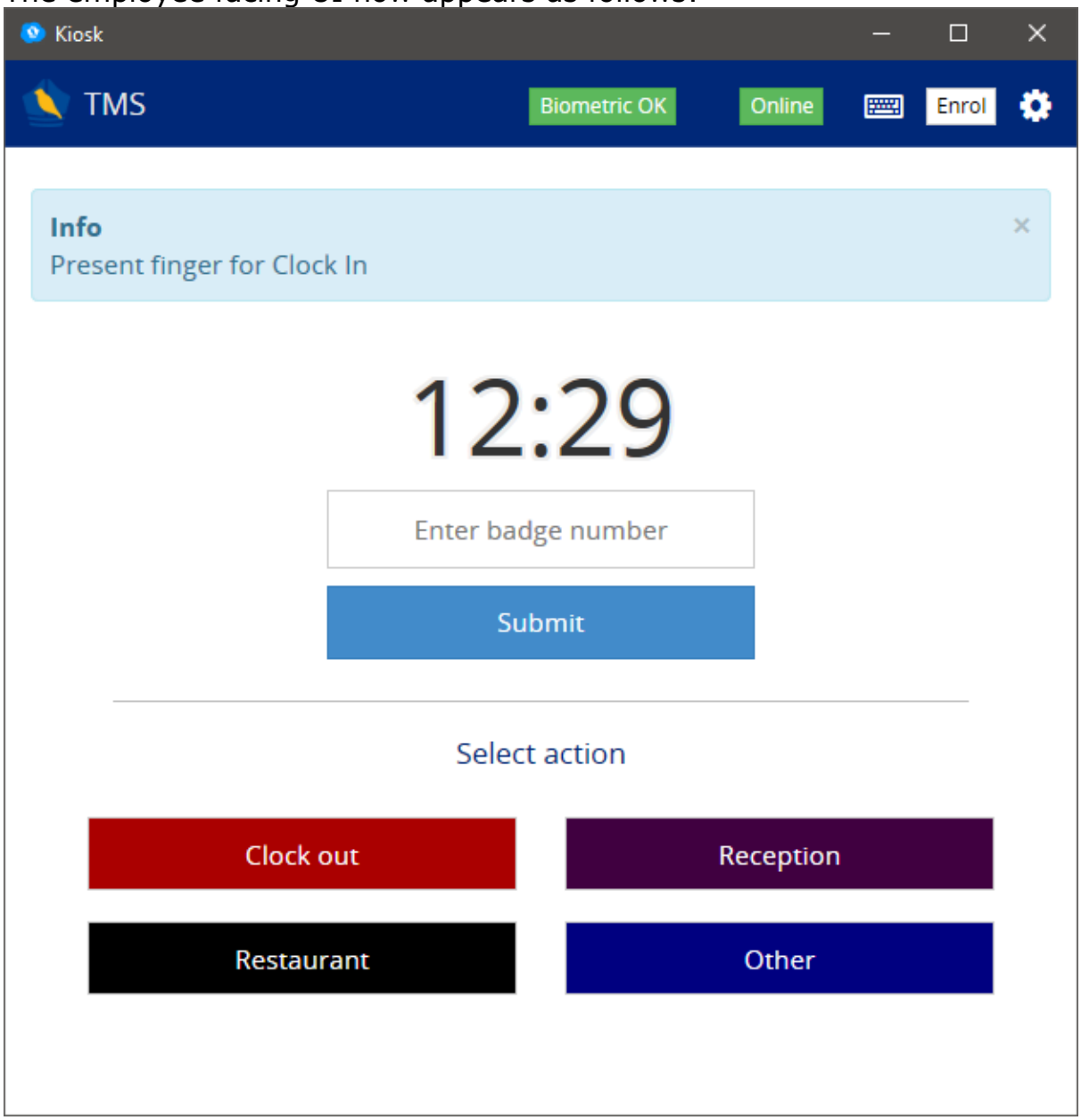
The kiosk client will now hide keyboard badge entry if all actions are either proximity-only or disabled.

The kiosk client now plays the following standard windows sounds whenever a message is displayed to the user:

Message type	Standard Windows sound
Information	Default beep
Success	Asterisk
Warning	Question
Error	Exclamation

These sounds can be configured on the host machine by going to Control panel > Sound > Sounds or Control panel > Change system sounds.

The employee facing UI now appears as follows:



22.3 Kiosk site planner

The kiosk site planner (previously part of TMS7 'Site planner') has been migrated to TMS8. The 'Next gen' mode has been removed and now only a single configuration is allowed. When upgrading clients who have an existing TMS7 cloud kiosk installation, the first configuration will be used by TMS8 and all other configurations will be ignored.
The TMS8 kiosk site planner can be accessed from the Dashboard by the following shortcut:

The TMS8 kiosk site planner appears as follows:

All existing TMS7 functionality remains unchanged apart from the new kiosk licensing scheme.

22.4 Licensing

Each kiosk must be individually licensed. This can be done via the Kiosk details page, see below.

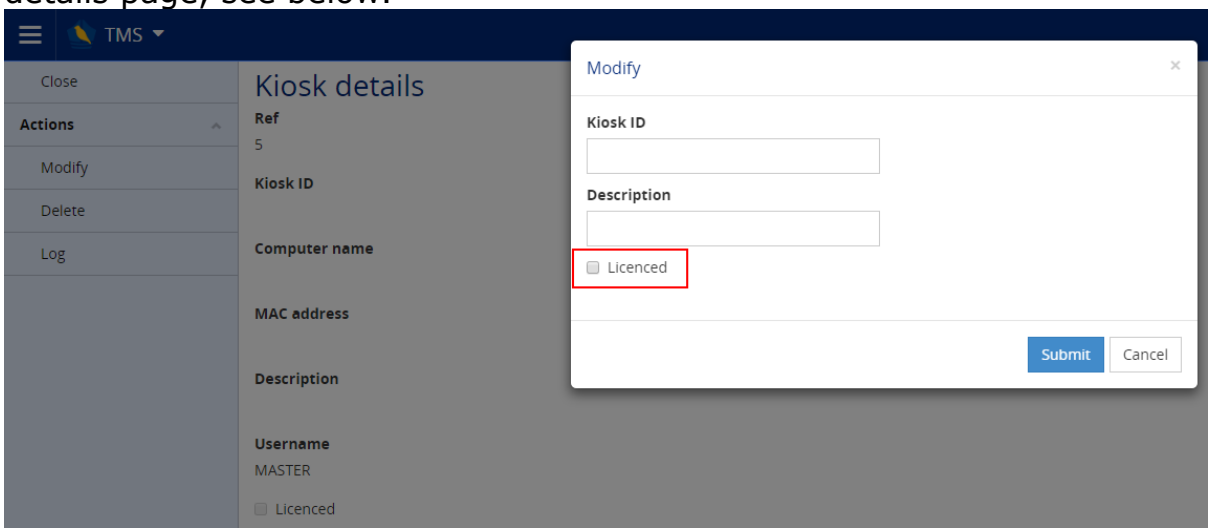


Figure 33: Kiosk details page licence toggle.

Each kiosk can require up to three licences as a licence is required for each of the following:

- The kiosk;
- Biometrics;
- Proxy.

The biometrics and proxy licence requirements can be toggled via the Configuration setup page, see below. Note, there is only one configuration and it applies to all kiosks.

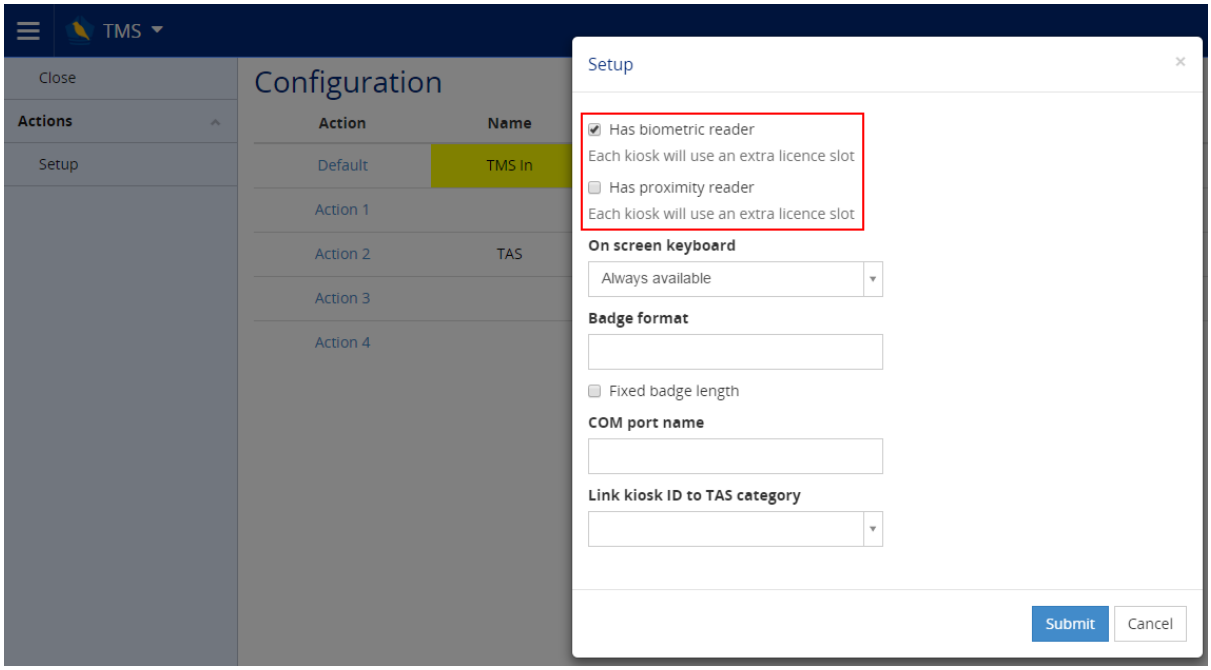


Figure 34: Configuration screen licence requirements.

Licences can be revoked from all kiosks via the Kiosk site planner Reset licences action, see below.

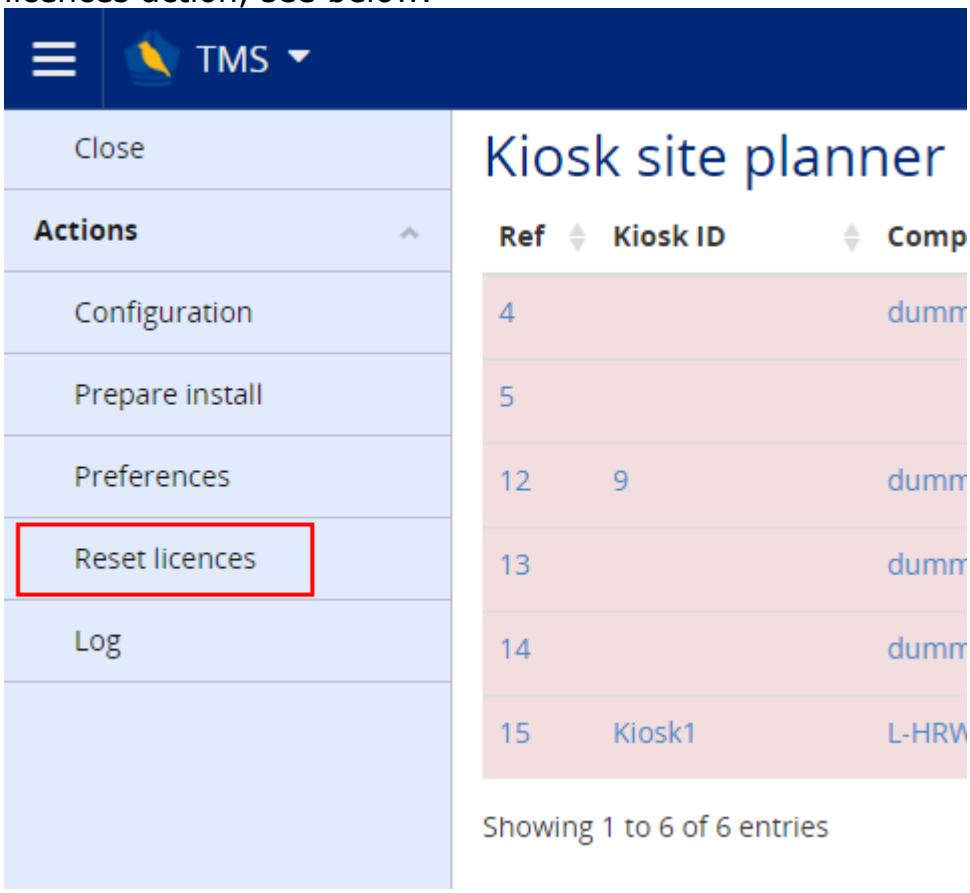


Figure 35: Revoke licences from all kiosks.

22.5 TMS for Mobile – usage note

When logged in to TMS for Mobile as a supervisor the list of actions to display, e.g. Book absence, is retrieved using the selected employee to

validate against. If no employee is selected some actions, such as Book absence, will be missing. If this occurs, browse to the TMS web site, ensure an employee is selected and then, back in TMS for Mobile, select the Sync action.

23 Release 8.14.0

23.1 TMS for 64-bit

TMS is now available for two architectures: x86 (32-bit) and x64 (64-bit). The x64 release allows more memory to be addressed, which can result in better performance on web sites with large throughput, i.e. lots of requests.
Only the TMS Server (web site) has an x64 option. Win32 applications and Kiosk are still x86 only.

23.1.1 Releases

In each TMS release you will find there are additional files.

- There will be two ZIP releases.
  - 32-bit – Mitrefinch.TMS.Server.<version>.**x86**.<type>-EXEs.zip
  - 64-bit – Mitrefinch.TMS.Server.<version>.**x64**.<type>-EXEs.zip
- There will be one CD release, which contains two MSIs.
  - 32-bit – Mitrefinch.TMS.Server.**x86**.msi
  - 64-bit – Mitrefinch.TMS.Server.**x64**.msi

23.1.2 MSI deployment

For a new TMS installation the MSI will configure all 32-bit or 64-bit dependencies.
For an existing TMS installation, if you wish to install TMS for 64-bit please uninstall the 32-bit deployment first.

23.1.3 Manual zip upgrade

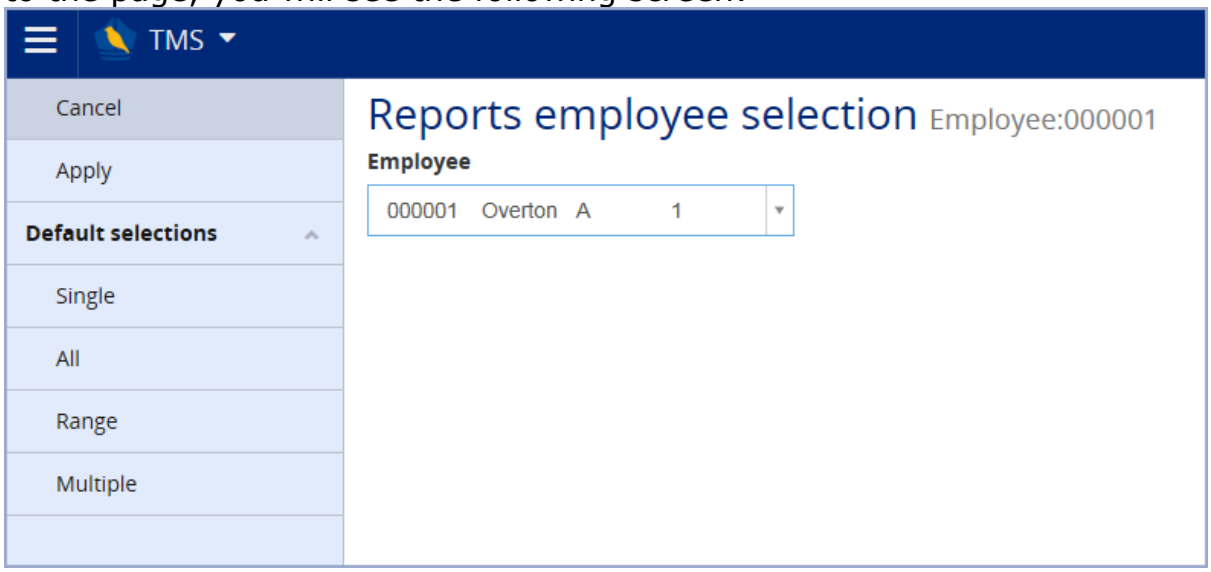
As before, the x86 ZIP can be deployed directly over an existing TMS for 32-bit deployment.
If you wish to deploy the x64 ZIP over an existing TMS for 32-bit deployment the following additional steps are needed:

- IIS application pool 32-bit support must be disabled.
  - *IIS\Application pools\<select pool>\Advanced settings\Enable 32-bit applications\False*
- *Gecode x64* must be copied to the system path, i.e. *c:\windows*.
  - These DLLs can be found in *<vdir>\Install\Gecode*.
- C++ x64 runtime must be installed.

- The installer can be found in <vdir>\Install\MSVCR\vcredist_x64.exe.

23.2 Reports employee selection

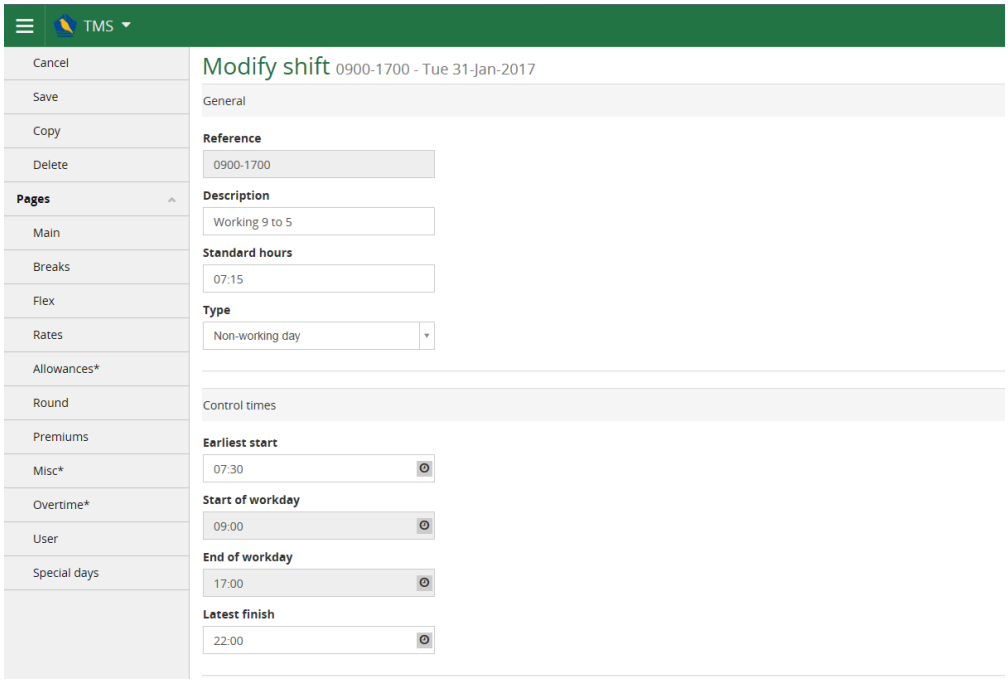
It is possible to run Reports for a specific selection of Employees, which will not interfere with the overall application selection, and this can be achieved on the Reports employee selection page. When first navigating to the page, you will see the following screen:



After specifying the desired employee selection, click on 'Apply', at the top of the left-hand pane to confirm your choices. It is important to note that your selections will only be saved whilst you remain in the Reports feature, once you exit the feature your selections will be reset. Selecting 'Clear' will wipe out any previous selections, enabling you to start making selections from scratch, or to use the default application employee selection. Selecting 'Cancel' will remove any changes that have been made, but not applied.

24 Release 8.14.1

24.1 Shift Maintenance



Added in this release is stage one of the shift maintenance feature. It allows for adding, deleting, modifying and copying shift definitions. Transitioning between pages will temporarily store any amendments into the 'webstate' – an alternate name for WEBSTATE table in the db. Asterisks next to a page name indicate that the page has been marked as overridden from the work rules, but this only applies to pages which have a corresponding work rule section.

24.2 Clock card and Anomalies features - drag and drop notification messages

The clock card, group clock card and anomalies features now display applicable error and warning messages when performing drag and drop operations where relevant. Previously, messages would not be displayed and any disallowed drag and drop operations would not provide feedback to the user.

An example of feedback would be a drag and drop operation that exceeds entitlements:

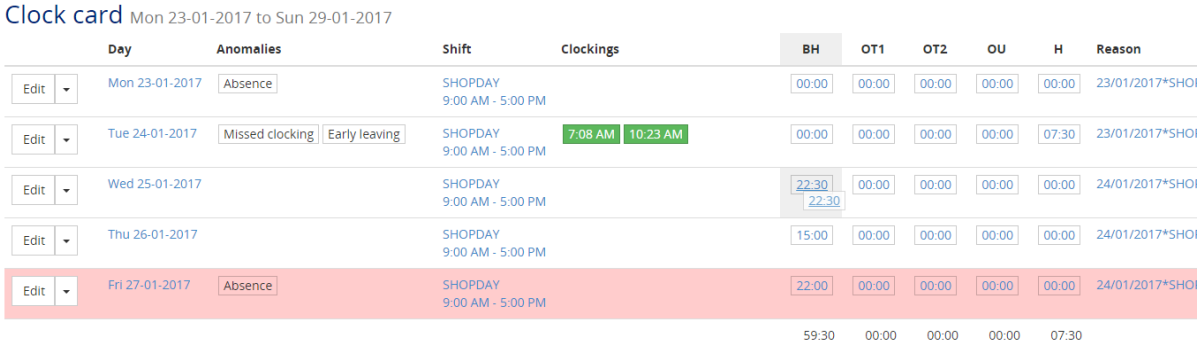


Figure 36: Selecting the value of 22:30 'Basic Hours' on Wed 25-01-2017 and commencing a drag operation

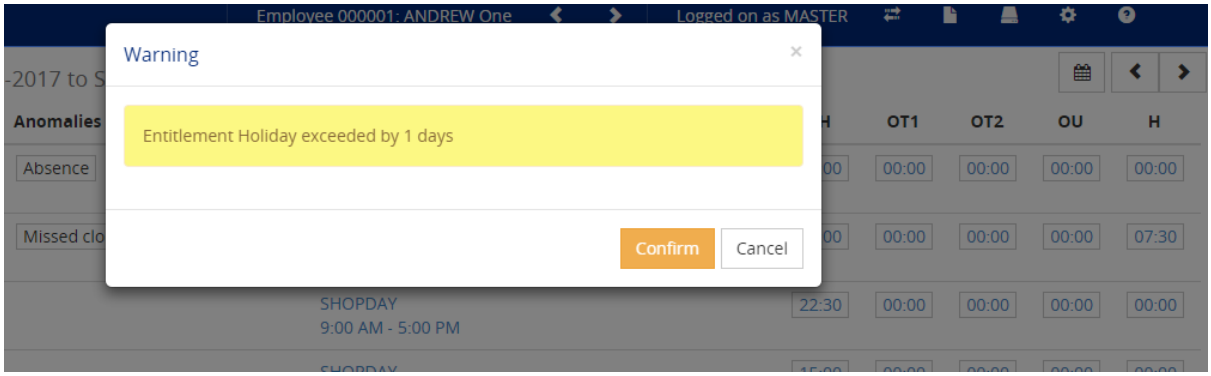


Figure 37: Dropping the value of 22:30 on Wed 25-01-2017 into the 'Holiday' Hours code prompts a warning dialogue

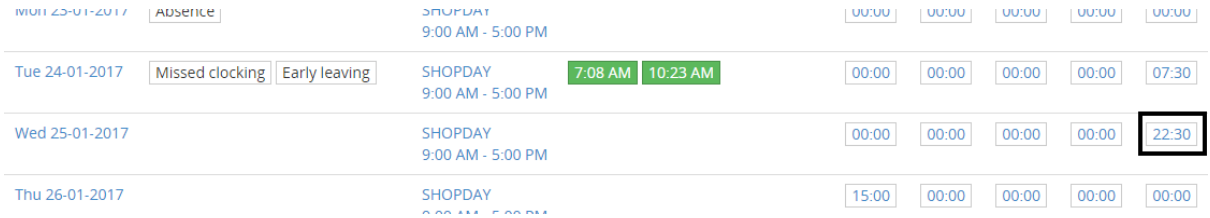


Figure 38: After selecting 'Confirm', the value of 22:30 is appended to the 'Holiday' Hours code

24.3 New system functions

The following system functions have been appended to this release.

24.3.1 Function - ANYSTRFLDWHERE

A new function ANYSTRFLDWHERE has been added which expands ANYSTRFLD functionality to multi-line tables.
The function takes 4 parameters:

Code	Code to lookup
Tablename	Table to lookup the code in
Fieldname	The field to be return
Where	A clause that limits the list of rows returned

This functionality will use the FIRST field in the primary index of the table to return a list of entries that match the code value. The 'Where' clause is then used to reduce this list of entries down to a single row.
For example: ANYSTRFLDWHERE[INTWP, TMSWD, WSREF, 'OFFSET=0']
will return the shift reference of the first day in an employee's working pattern.

24.3.2 Function - INTWP

A new function INTWP has been added into the calculations module to return the internal name of the working pattern for an employee. Previously, WP only returned '<personal>' if the pattern was personalised.

24.3.3 Function - INTACSREF

A new function INTACSREF has been added into the calculations module to return the internal name of the access group for an employee. Previously, ACSREF only returned '<personal>' if the access group was personalised.

25 Release 8.14.2

25.1 Payslips – P60 support

The Payslips feature now supports P60 documents in both PDF and XML format.

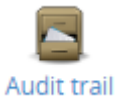
25.2 Audit trail feature

A new feature Audit trail has been added which allows a supervisor (or the master user) to be able to view any of the audit entries in TMS. The Audit trail has replicated the functionality in WinTMS as follows:

- The audit entries can be narrowed to a date range (a single date, multiple days)
- Further to the above point audit entries can be filtered by combinations of the possible criteria: employee, change type(s),

other fields (pc name, supervisor). The Audit entries can also be ordered by setting the order on the filter page to any of the columns by which the audit entries can be displayed.

The Audit trail can be accessed either via the dashboard, or via the system menu, by selecting the following icon:



26 Release 8.15.0

26.1 Performance enhancements

The response time of the following pages has been improved: Group anomalies, Anomalies widget, Absence profile, Dashboard (basic), Employee licensing, Group planner, Hours approval and Timesheet.
In part, response time has been improved by the introduction of pagination. For example, the Group planner will display 10 records at a time.

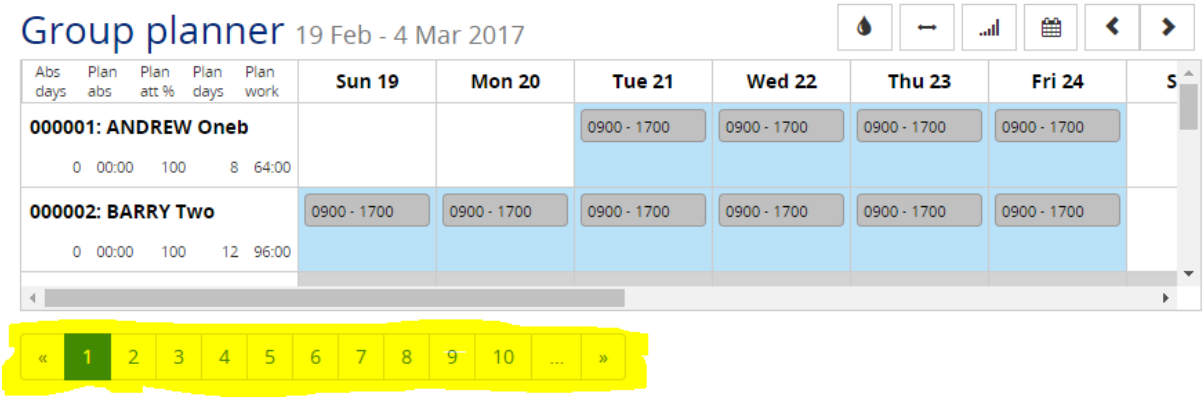


Figure 37: Group planner pagination.

The number of records to display can be modified via *System preferences\Interface\Display\Number of rows to display in a table*.

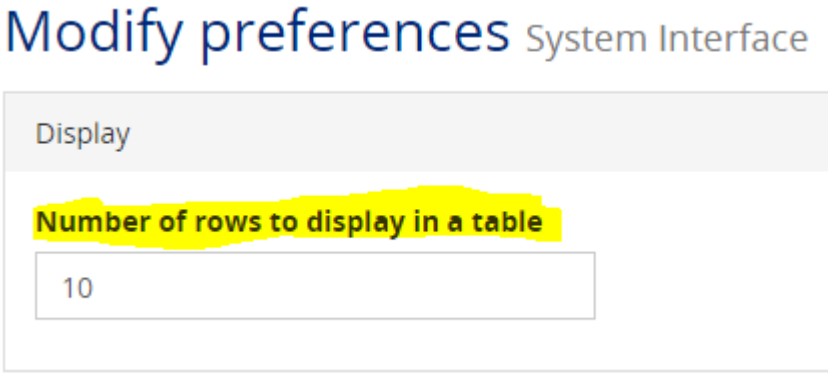


Figure 38: Pagination preference.

26.2 On-site preferences

On-site preferences have been moved from the On-site feature to the System preferences feature along with all of the other preferences.
The preference named *Rebuild cache interval (mins)* is used to control how often the On-site list is refreshed and cached in memory. It defaults to off, 0, as it can be a costly operation, but when enabled results in the On-site list being displayed much quicker as it is served from cache.

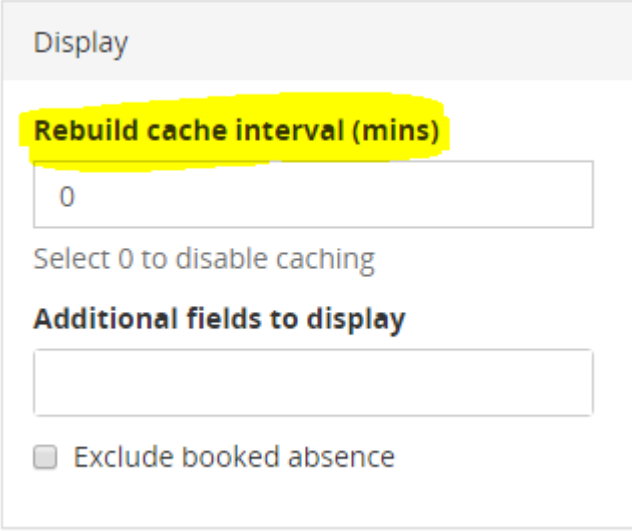


Figure 39: On-site preferences.

26.3 New system functions

The following system functions have been appended to this release.

26.3.1 Function – PPWSUSERTEXT

A new function PPWSUSERTEXT has been added which allow for the user text within a shift to be accessed with ;PREPROCESS calculations. This function can be used in both a read-only mode which will return the value from the shift as well as a writable mode which will update the user text within the shift.

26.3.2 Function – PPWSUSERCHAR1

A new function PPWSUSERCHAR1 has been added which allow for the first user character within a shift to be accessed with ;PREPROCESS calculations. This function can be used in both a read-only mode which will return the value from the shift as well as a writable mode which will update the first user character within the shift.

26.3.3 Function – PPWSUSERCHAR2

A new function PPWSUSERCHAR2 has been added which allow for the second user character within a shift to be accessed with ;PREPROCESS calculations. This function can be used in both a read-only mode which will return the value from the shift as well as a writable mode which will update the second user character within the shift.

27 Release 8.15.1

27.1 Supervisor group planner and calendar drag and drop operations

The group planner and calendars now allow supervisors to move and copy items via drag and drop operations. Drag and drop operations are supported on the timeline and grid layouts for any calendar. Currently only the shift data type supports drag and drop operations.

Figure 40: Moving a shift by commencing a drag operation

A shift can be selected by left clicking on the shift and holding down the left mouse button. If the shift does not reside on a processed or out of scope day, it can be dragged.

Figure 41: Dropping a shift onto a new day

A drag indicator will appear on the shift whilst it is being dragged. Dropping a shift onto a new day that is not processed or out of scope will update the row with the shift.
A shift may be copied by holding down the SHIFT or CONTROL key whilst commencing a drag operation.

27.2 Special Rule 'scUnique' added

A new special rule called 'ScUnique' has been added. This will enable a check on the field to validate that the value being entered is unique across all employees in the system and prevent the value being saved. Should the check fail, an appropriate handled error is displayed to the user.
The Special rules are setup within DBDEF and the Advanced Settings of a field. See the Special Rules document on Sharepoint for more information.

28 Release 8.16.0

28.1 Work record flags

Work record flags can now be set against a planned shift in the Group planner.
Flags can be activated via the System preferences, which also provides a link to set flag titles. Only flags with a title will be displayed.

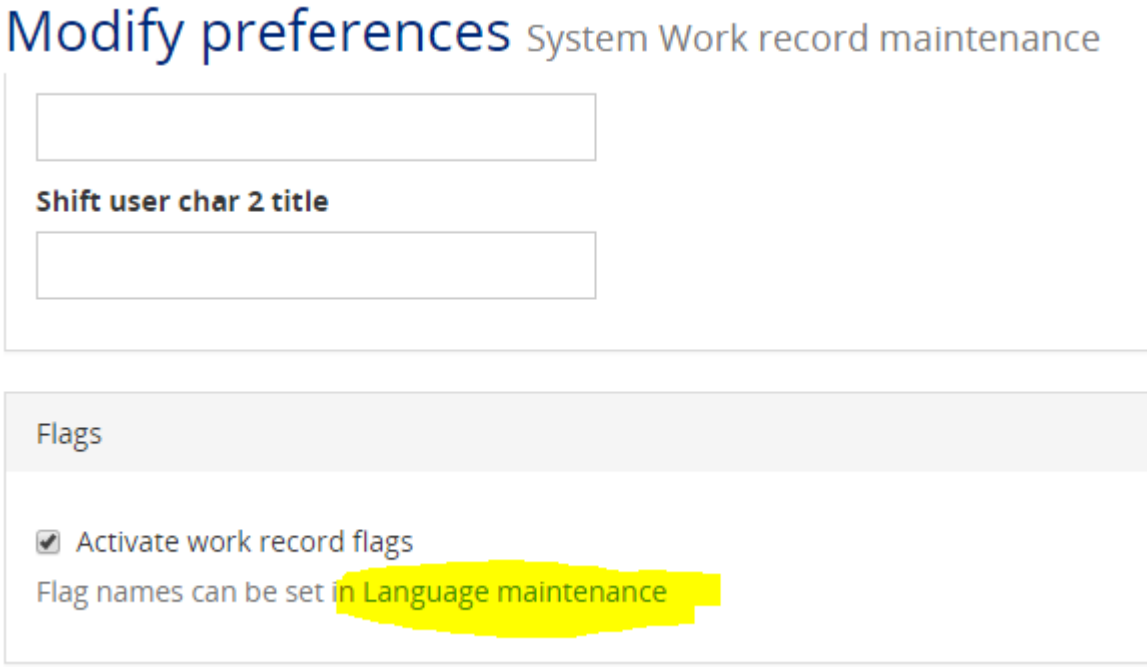


Figure 40: Work record flag preferences.

The flags action will appear against the selected shift.

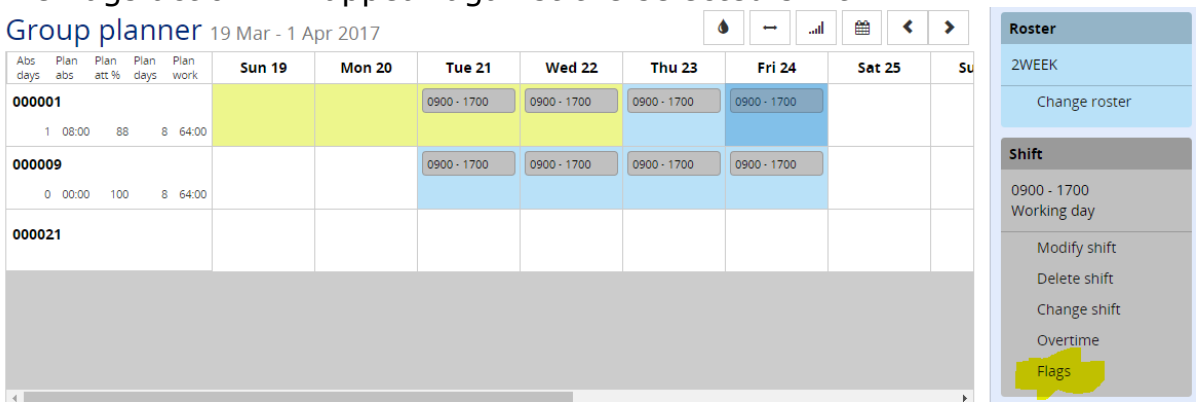
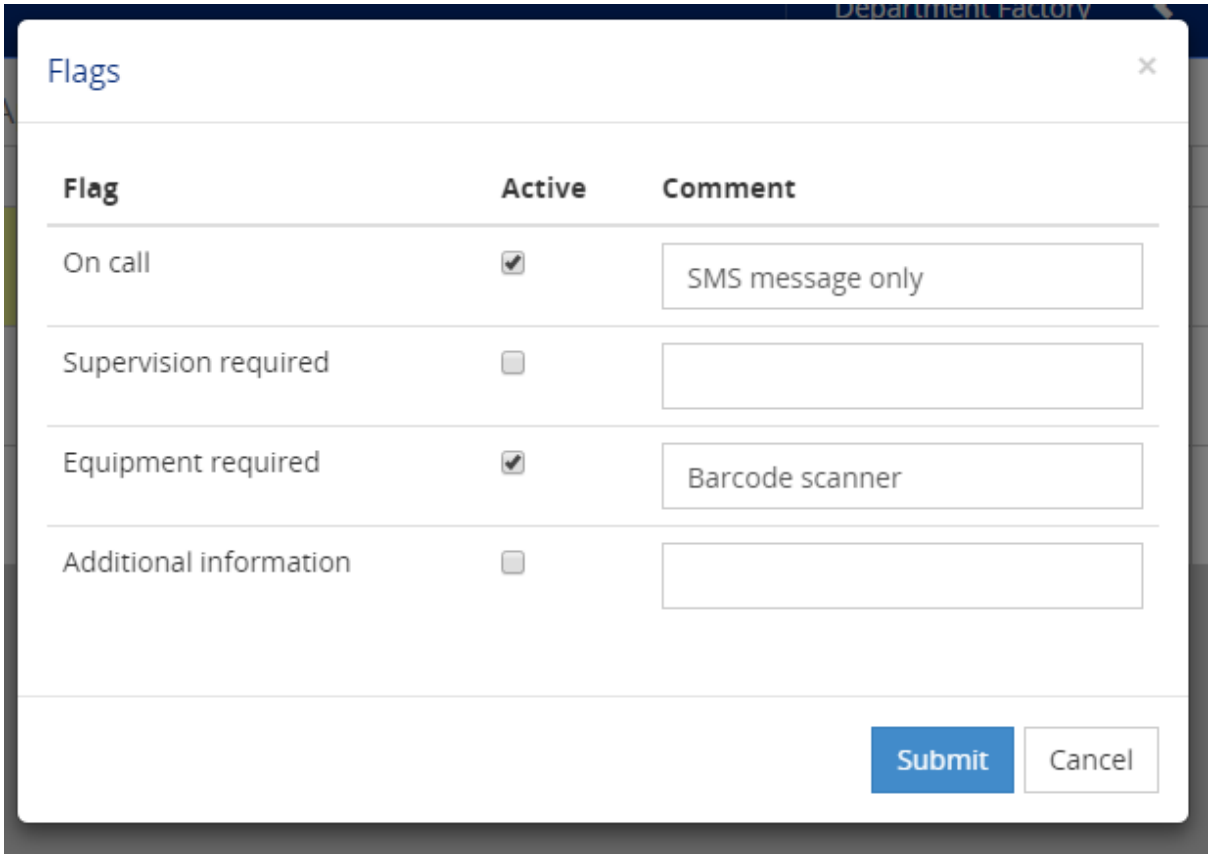


Figure 41: Work record flags action.

A flag can be activated and an optional comment appended. Only comments for active flags will be saved.



28.2 Analytics

An Azure resource has been setup to capture TMS8 web traffic, such as which pages are being viewed, which will allow us to do the following:

- Identify the number of clients using a feature.
  - For example, measuring the take-up of new features.
- Target development.
  - For example, a long time spent viewing the Anomalies page may suggest UX improvements can be made.
- Tailor sales to a specific customer.
  - For example, a customer requesting Employee pools frequently may benefit from Rostering.
- Identify performance issues.
  - For example, exception counts and page response times.

All data collected is anonymous, we only know the URL of the request.

28.2.1 Activation

Analytics can be activated by inserting the following elements into the web.config:

```
<appSettings>
  <add key="analytics:mode" value="insight" />
  <add key="analytics:clientKey" value="<key required>" />
</appSettings>
```

Access to analytics is controlled by the Development Team. Please request an *analytics client key* from Development to activate the feature. When the analytics are activated we will gain access to basic information, such as page views, response times and exception counts.

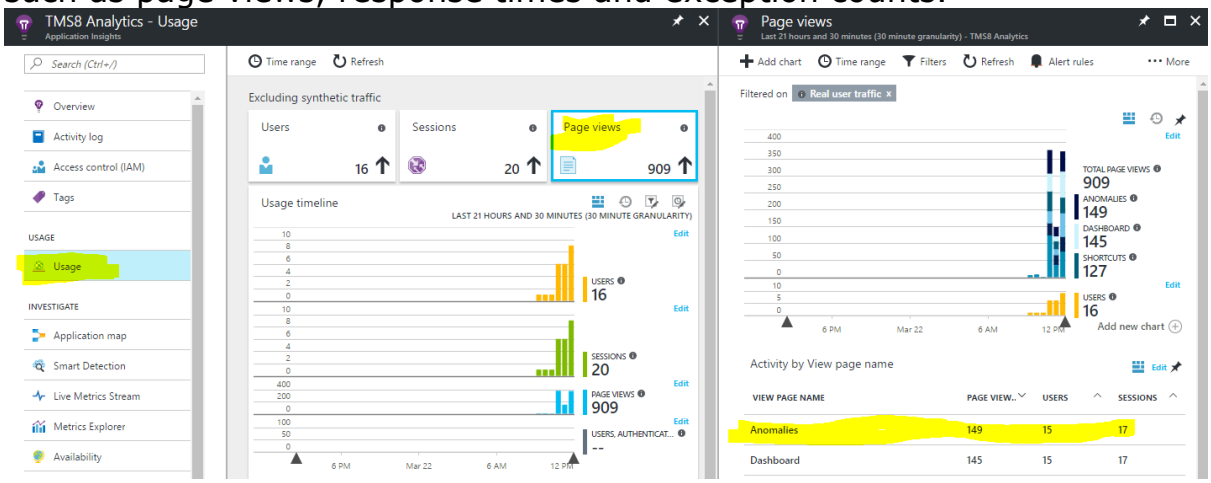


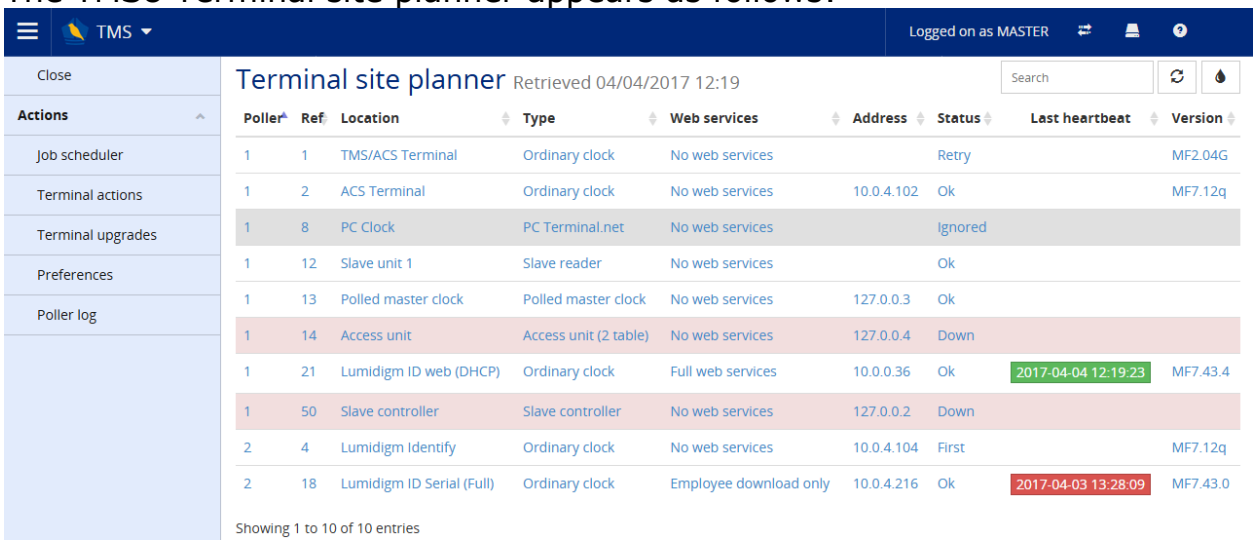
Figure 42: Analytics view.

28.3 Terminal site planner

The Terminal site planner (Site planner in TMS7 Silverlight) has been migrated to TMS8. The UI has been updated to match the TMS8 standard user interface. All previous functionality has been implemented and a new Terminal actions section has been added.

The TMS8 Terminal site planner can be accessed from the Dashboard by the following shortcut:

The TMS8 Terminal site planner appears as follows:



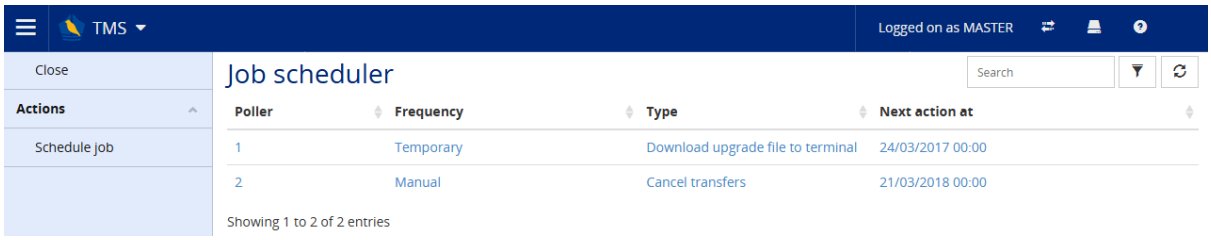
Poller	Ref	Location	Type	Web services	Address	Status	Last heartbeat	Version
1	1	TMS/ACS Terminal	Ordinary clock	No web services		Retry		MF2.04G
1	2	ACS Terminal	Ordinary clock	No web services	10.0.4.102	Ok		MF7.12q
1	8	PC Clock	PC Terminal.net	No web services		Ignored		
1	12	Slave unit 1	Slave reader	No web services		Ok		
1	13	Polled master clock	Polled master clock	No web services	127.0.0.3	Ok		
1	14	Access unit	Access unit (2 table)	No web services	127.0.0.4	Down		
1	21	Lumidigm ID web (DHCP)	Ordinary clock	Full web services	10.0.0.36	Ok	2017-04-04 12:19:23	MF7.43.4
1	50	Slave controller	Slave controller	No web services	127.0.0.2	Down		
2	4	Lumidigm Identify	Ordinary clock	No web services	10.0.4.104	First		MF7.12q
2	18	Lumidigm ID Serial (Full)	Ordinary clock	Employee download only	10.0.4.216	Ok	2017-04-03 13:28:09	MF7.43.0

28.3.1 Terminal upgrades

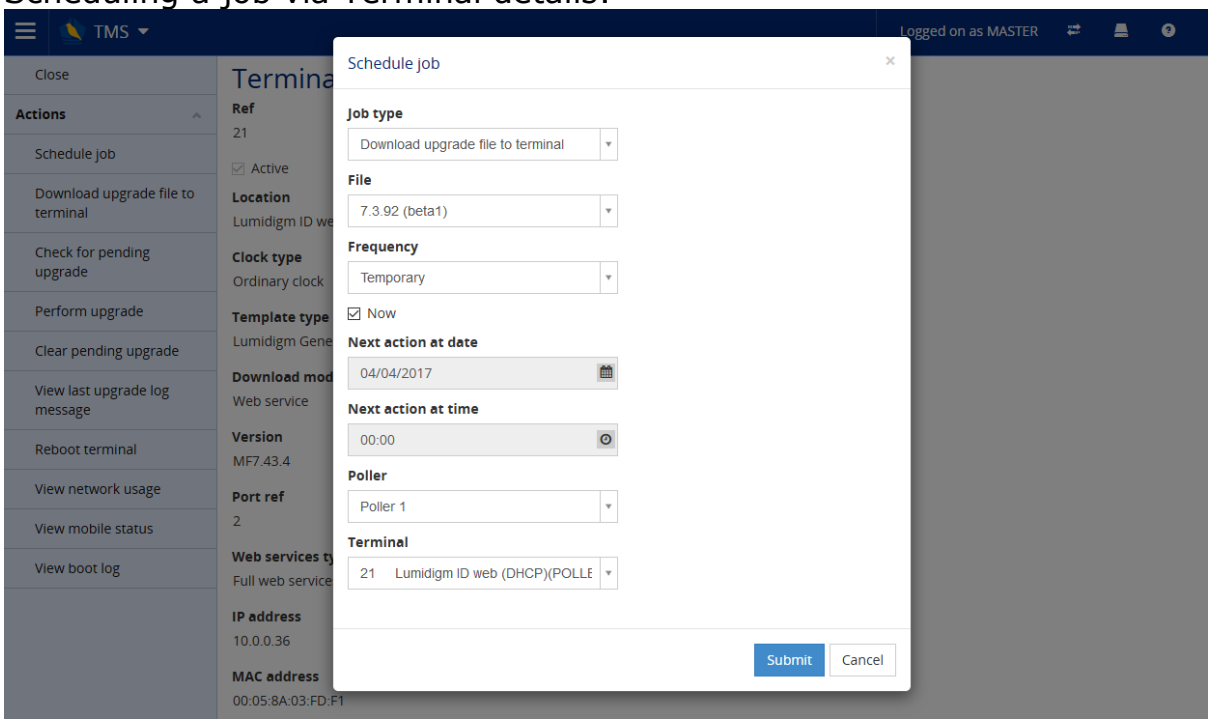
Managing terminal upgrades has been changed to store upgrade URLs instead of storing the upgrade file itself. Terminal upgrade files are now required to be hosted for the system to function correctly.
Note that the URL must point to a location accessible by the terminal – this will typically not include Windows PC names, or locations in the local file system.
Terminal upgrades:

28.3.2 Job scheduler

All jobs are handled either through the Job scheduler or from the Terminal details pages.
Job scheduler:

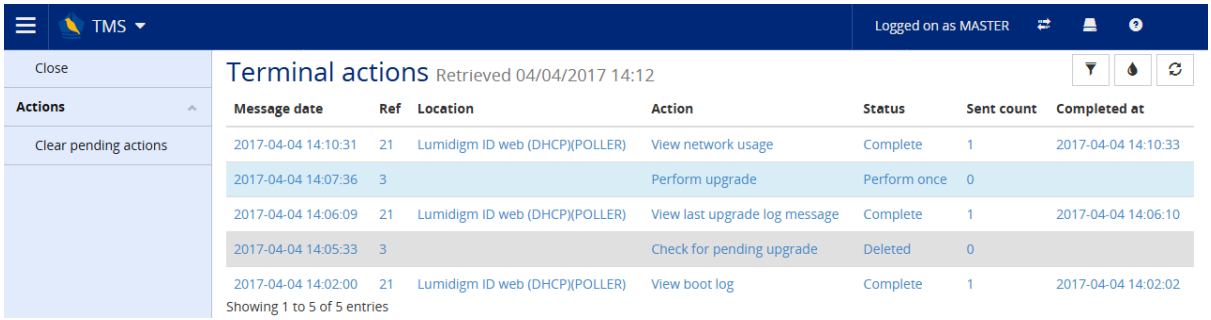


Scheduling a job via Terminal details:



28.3.3 Terminal actions

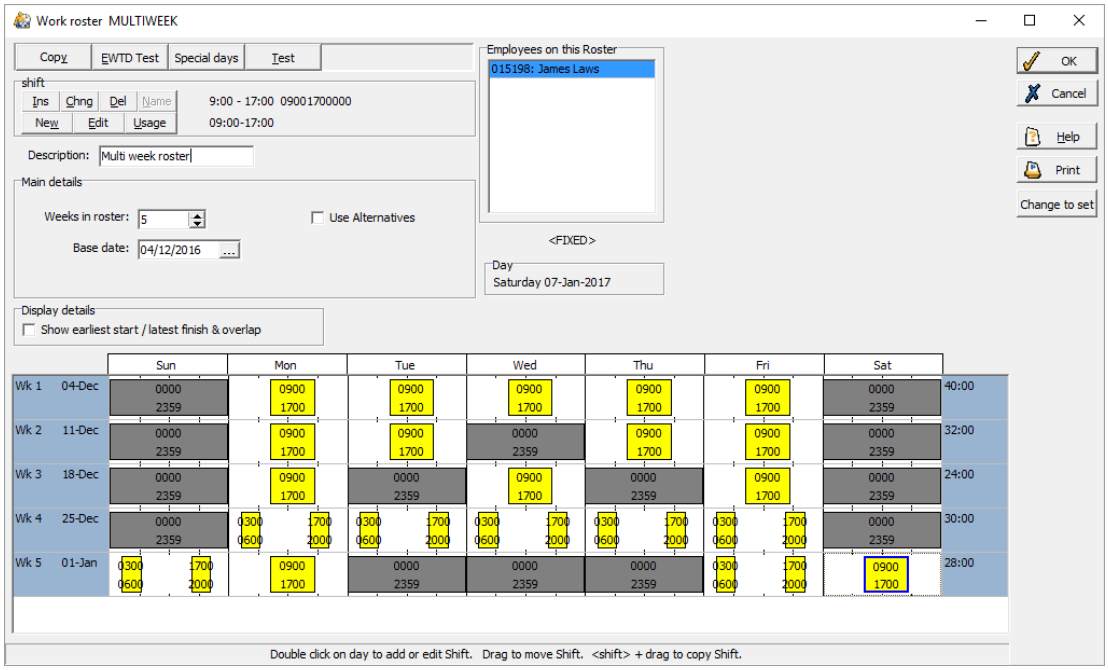
The Terminal actions page shows a list of actions that have been scheduled to be sent to the terminal. Currently only actions for web terminals are displayed.
The type of action and the status indicate what is being sent to the terminal, and whether it has been successfully sent yet. Some actions will return data from the terminal, in these cases the data can be viewed by clicking on the action.
The list of actions will be purged periodically, according to the preference "Purge terminal actions after (hours)". The system can also be configured to delete completed actions automatically, by enabling the preference "Permanently delete completed terminal actions". In this case, the completed actions will not be visible in the Terminal actions list.
Terminals actions



Data displayed after selecting the View network usage action

28.4 New identifier WPACTUALWORKDAYS

A new identifier WPACTUALWORKDAYS has been created which reports on the number of actual working days defined for a week within the roster. This identifier is different to WPWORKDAYS as it does not look at the number of shifts defined in the roster but the number of working days. It takes a single parameter which is the 'week number' as defined in the roster. Therefore, in the following example:



WPACTUALWORKDAYS[1]	will return	5
WPACTUALWORKDAYS[2]	will return	4
WPACTUALWORKDAYS[3]	will return	3
WPACTUALWORKDAYS[4]	will return	5
WPWORKDAYS[4]	will return	10
WPACTUALWORKDAYS[5]	will return	4
WPWORKDAYS[5]	will return	6

29 Release 8.16.1

29.1 Standalone enroller

The enroller application can now be built and installed without requiring a Kiosk site planner licence.
The TMS8 enroller installer can be accessed from the Dashboard by the following shortcut:

To enable this feature, the system requires a TMS or Access Control licence and the Fingerprint enrolment action should be enabled for the logged in user.

30 Release 8.16.2

30.1 HR panel document attachments

Documents can now be attached to a HR panel via an action in the left navigation pane, see below. The number of documents attached to the panel is displayed to the right of the action name. This action will appear under the following conditions:

- The user has access to the Employee details Documents action.
- The page is not in Modify mode.
- The panel supports document attachments.

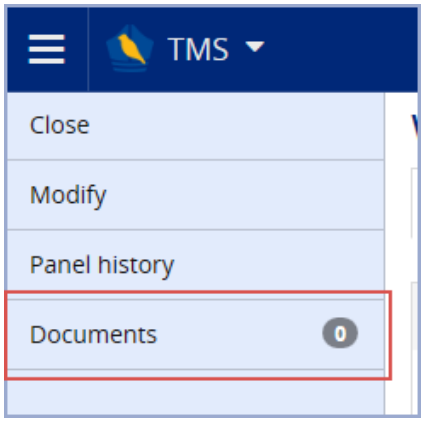


Figure 43: Documents action and count.

When viewing a multi-line panel (table) the document link will appear against each individual record when opened for viewing.

30.2 Timesheet delete action

The Timesheet now includes a Delete work record action, see below. This action will appear under the following conditions:

- The user has access to the Clock card Delete day action.
- The page is not in Modify mode.

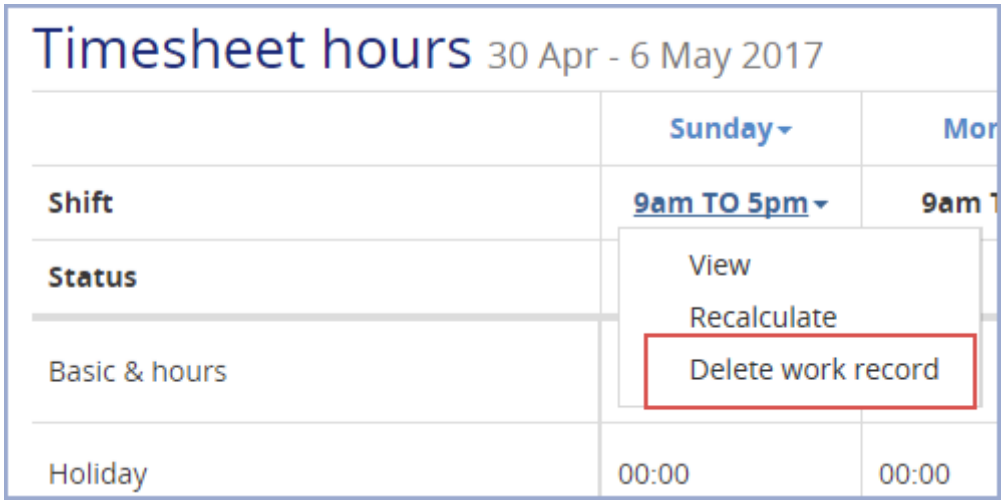


Figure 44: Delete work record action.

31 Release 8.17.1

31.1 Fixed column headers for Clock Card and Anomalies Grids

The column headers for the Clock card and Anomalies grids will now be displayed when a user scrolls a grid with a large number of rows. This allows for easier identification of columns, e.g. hours codes.

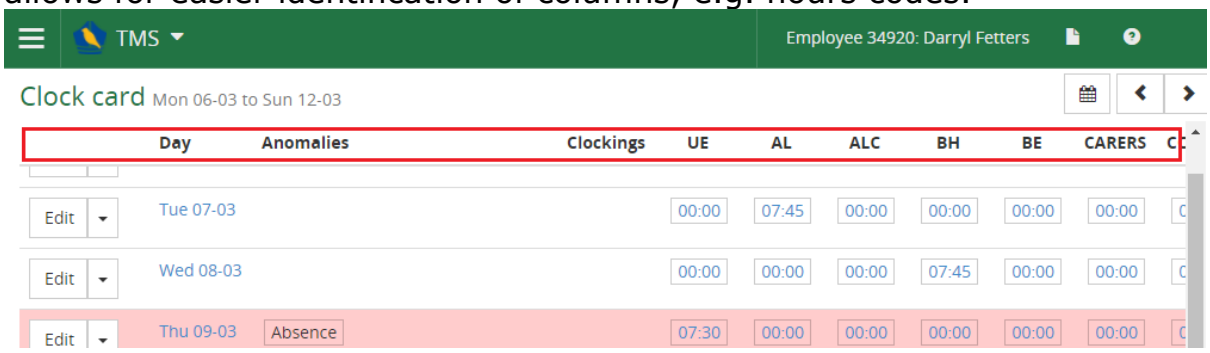


Figure 45: Showing column headers after scrolling the Clock card grid.

31.2 Orphaned (discarded during add) employees deletion

Orphaned employees is a new action available under Add employee. This action includes the current number of system-wide orphaned employees (discarded during add). The new action replicates the 'Check for employees discarded during add' Tools menu option in SYSGEN.

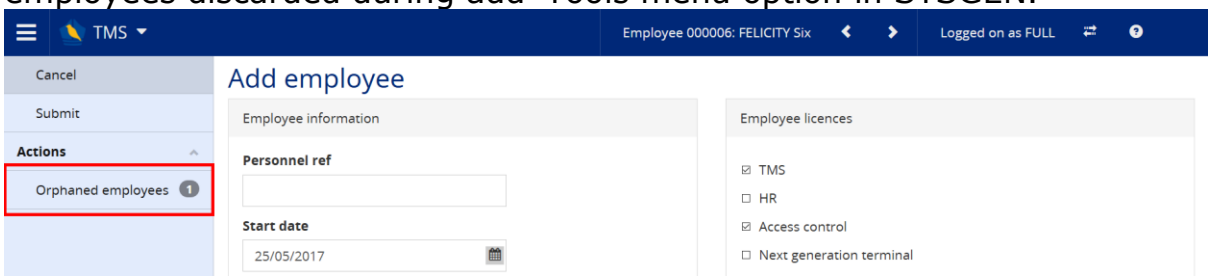


Figure 46: Orphaned employees under Add employee.

Using the new action, employees blocked from addition can now be deleted.

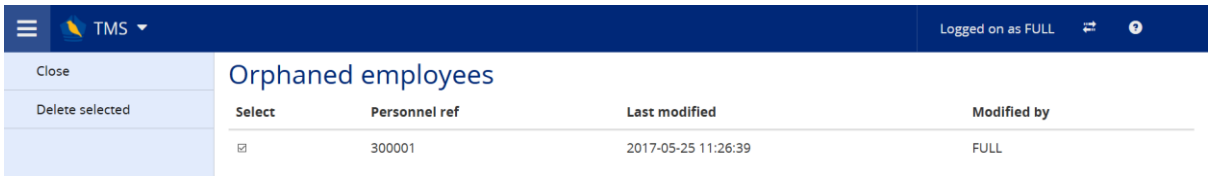


Figure 47: Orphaned employees list.

The Orphaned employees action can be enabled via the respective menu right in MODUSRP.

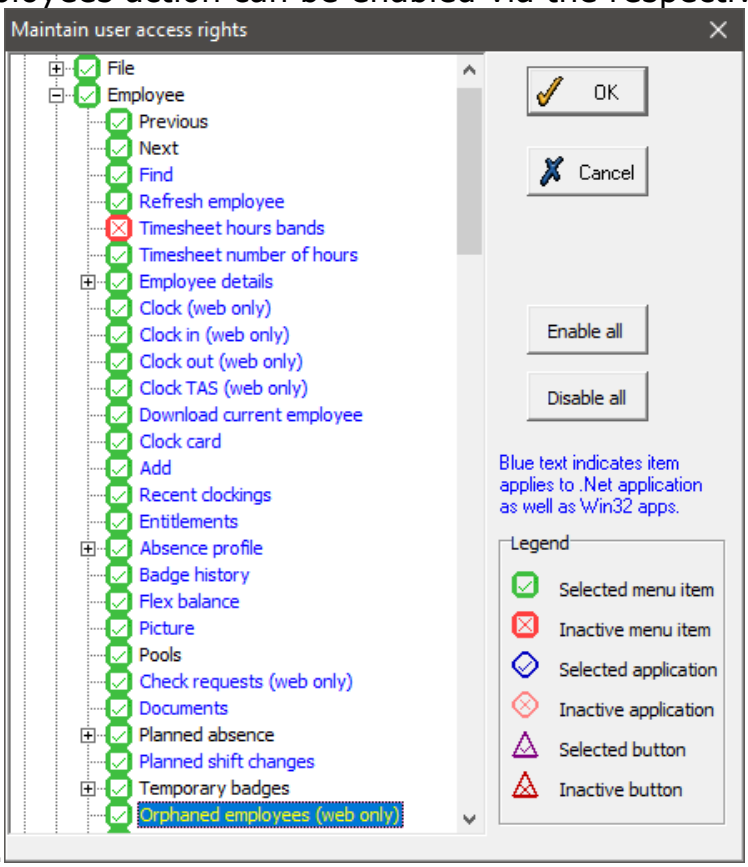


Figure 48: Orphaned employees menu rights.

31.3 Timesheet change shift action

The Timesheet now includes a Change shift action. This action will appear under the following conditions:

- The user has access to the Clock card change shift action.
- The page is not in Modify mode.

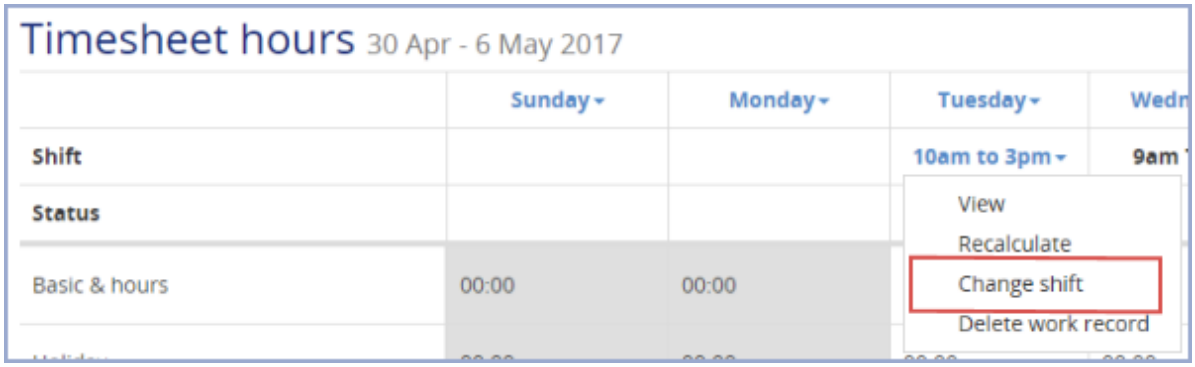


Figure 49: Change shift action.

32 Release 8.17.2

32.1 Data input restricted on fields with maximum length

Text fields with maximum character lengths now stop users from typing past the limit.

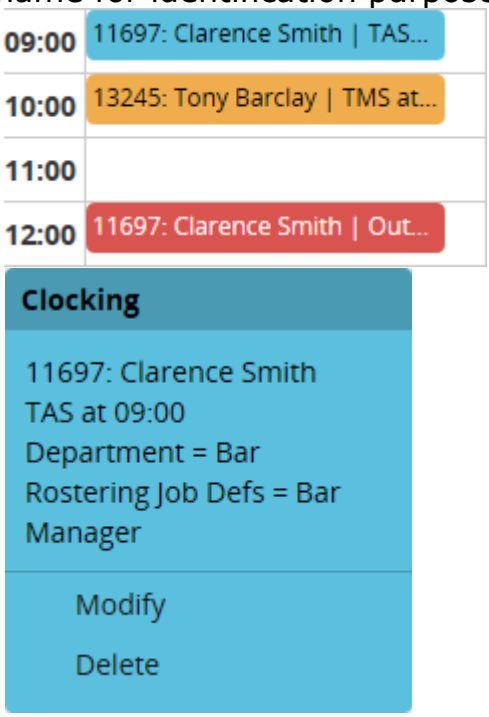
33 Release 8.17.3

33.1 TAS clockings display additional information in Calendar

TAS clockings now display TAS clocking information in the Calendar.

33.2 Group Calendars include employee ID and name

When viewing a Group Calendar, entries now display the employee ID and name for identification purposes.



34 Release 8.17.4

34.1 Security changes

The following changes have been added to harden TMS against attacks.

34.1.1 TMS version number moved

The TMS version number is no longer displayed in the pre-login help screen, it has now been moved to the 'About' page inside the TMS application.

34.1.2 Login error messages standardised

Failed logins will now only return a standard message, this will avoid allowing attackers to work out real user names.

34.1.3 Maximum password length increased

TMS will now allow maximum password values larger than 22 characters. The new limit is 1000 characters.

34.1.4 Display last login time to user

TMS will now display the last time a user logged in when the user logs in.

35 Release 8.17.6

35.1 Recent clocking permissions for employee

Permission to add, modify and delete a recent clocking has been extended to employees. These actions can be activated independently via *WinTMS\System\Employee profiles\Modify\Menu rights*, see below.

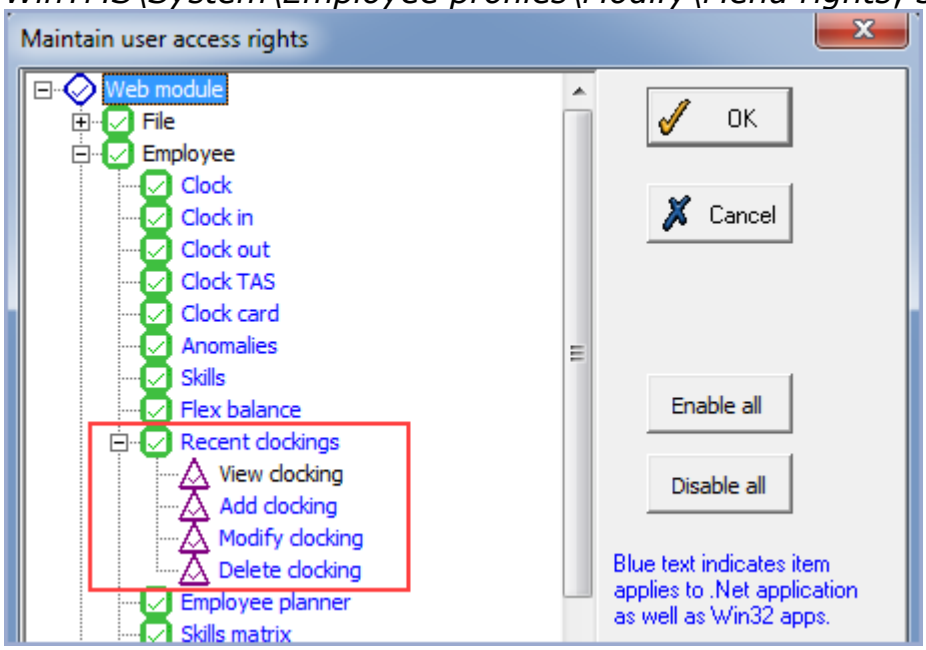


Figure 45: Add, modify and delete recent clocking actions.

Activating these actions results in an employee have the same recent clocking maintenance permissions as supervisor, which includes:

- No restriction on the type of clocking that can be actioned, i.e. TMS or TAS.
- Past or future clocking time can be submitted.

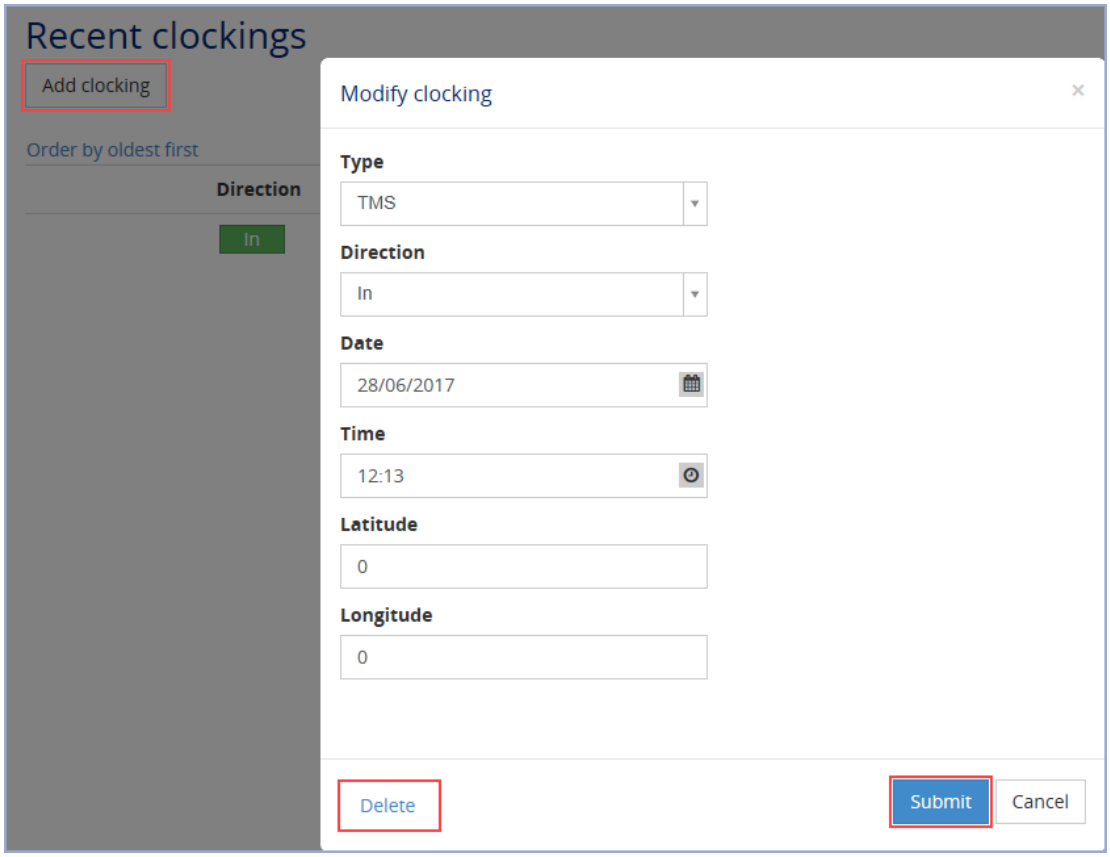


Figure 46: Recent clockings page with all actions activated for an employee.

All submitted actions will be audited. For example, we will record when an employee deletes a clocking.

- From the Recent clockings page an employee can add, modify and delete a clocking.
- From the Unused clockings page an employee can delete a clocking.

36 Release 8.17.8

36.1 New function added NEXTPERST

A new function **NEXTPERST** has been added that returns the next period start date for an Employee. This function works in the same way as **PREPERST** and **CURRPERST** functions and returns a date value.

37 Release 8.17.9

37.1 Additional Payments

A data type for showing, adding and modifying planned additional payments has been added to the Calendars feature. The data type is called 'Additional Payments' and will allow for the creation and display of planned additional payments. It is recommended that that this data type is used in conjunction with the shift data type.

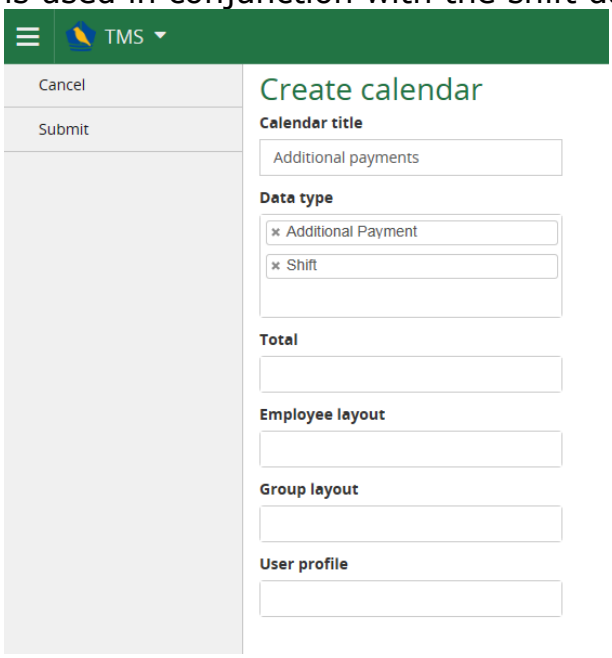


Figure 47: Creating a calendar with the 'Additional Payment' and 'Shift' data types.

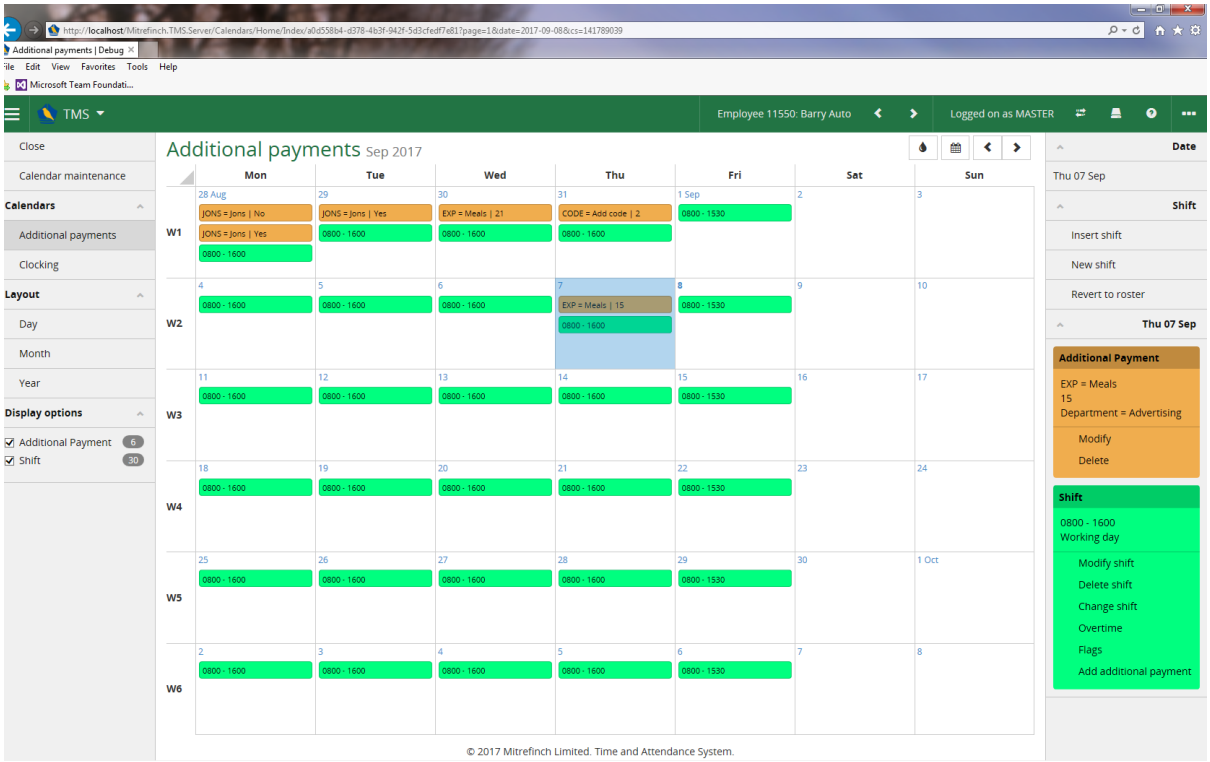


Figure 48: Displaying additional payments and shifts on a calendar. Options are presented against an additional payment to Modify and Delete, along with an 'Add additional payment' option for a shift.

37.2Job planner

The rostered jobs functionality has been ported to TMS8 web (pending licensing proposal).

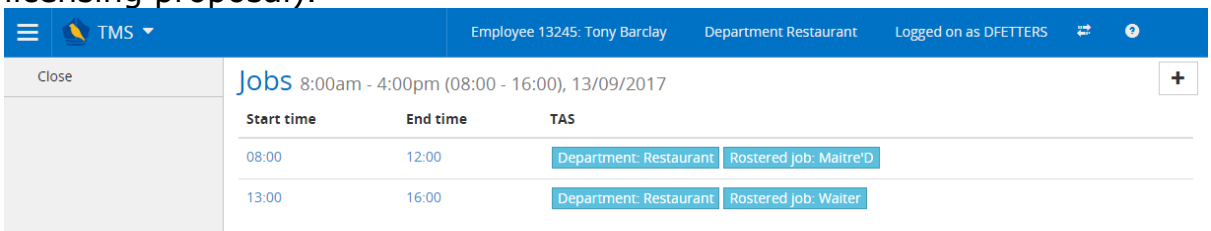


Figure 49: Job list

TAS entries associated with jobs can be configured in System preferences > TAS - Rostered jobs.

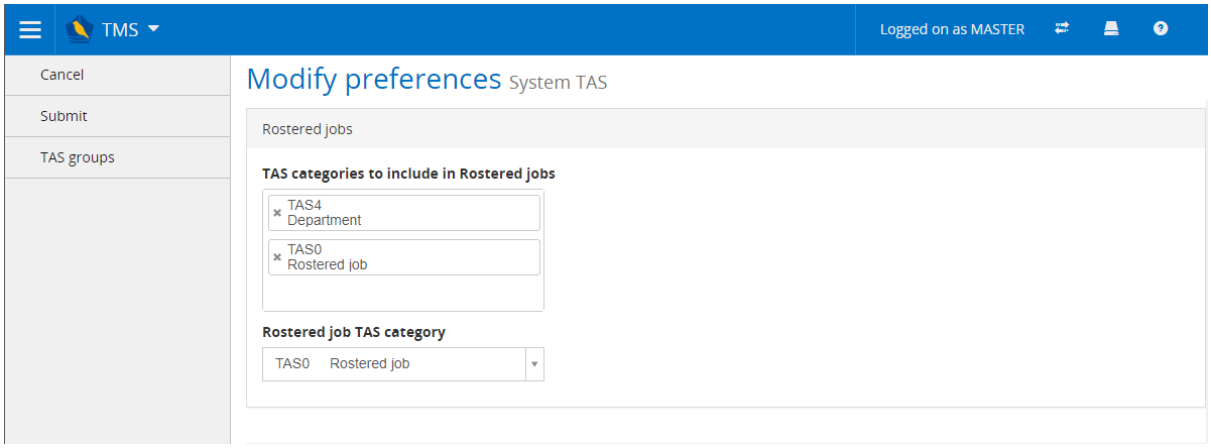


Figure 50: Job planner preferences

Each employee used for jobs requires an **Employee Rostering** licence. User profile menu rights required to modify jobs is found at TMS > Group > Future work planner: **Planned Job Change**.

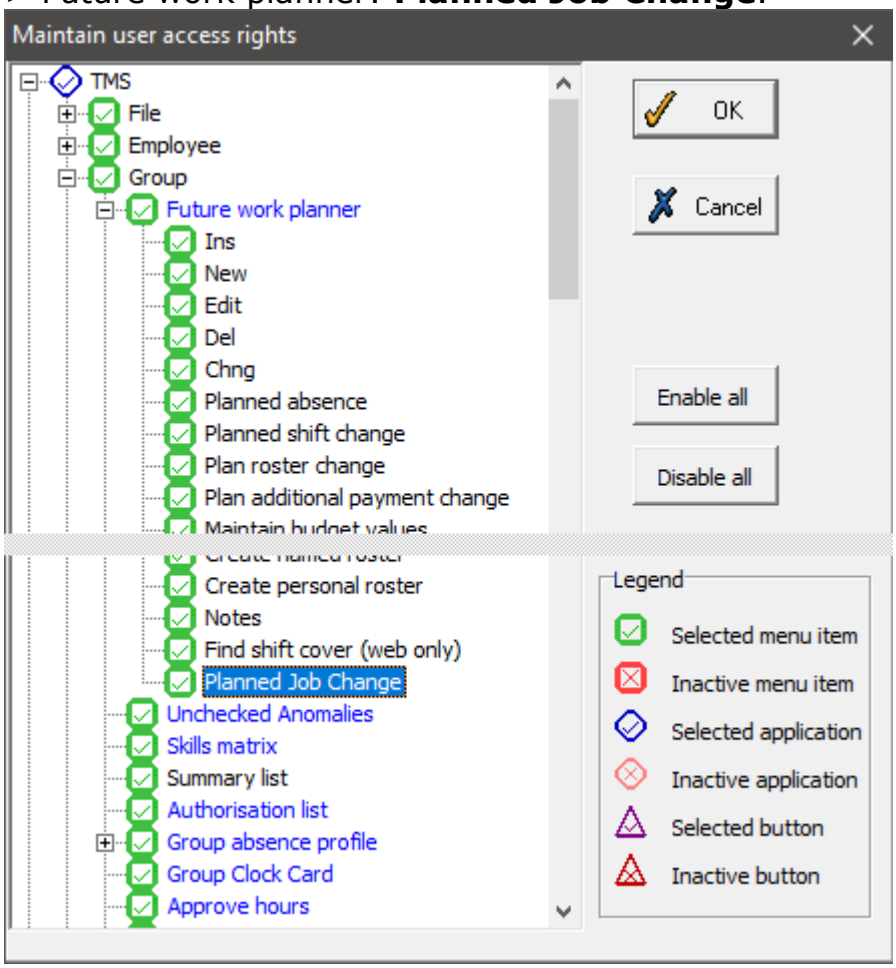


Figure 51: Jobs menu rights

Jobs are maintained from the Group and Employee planner pages.

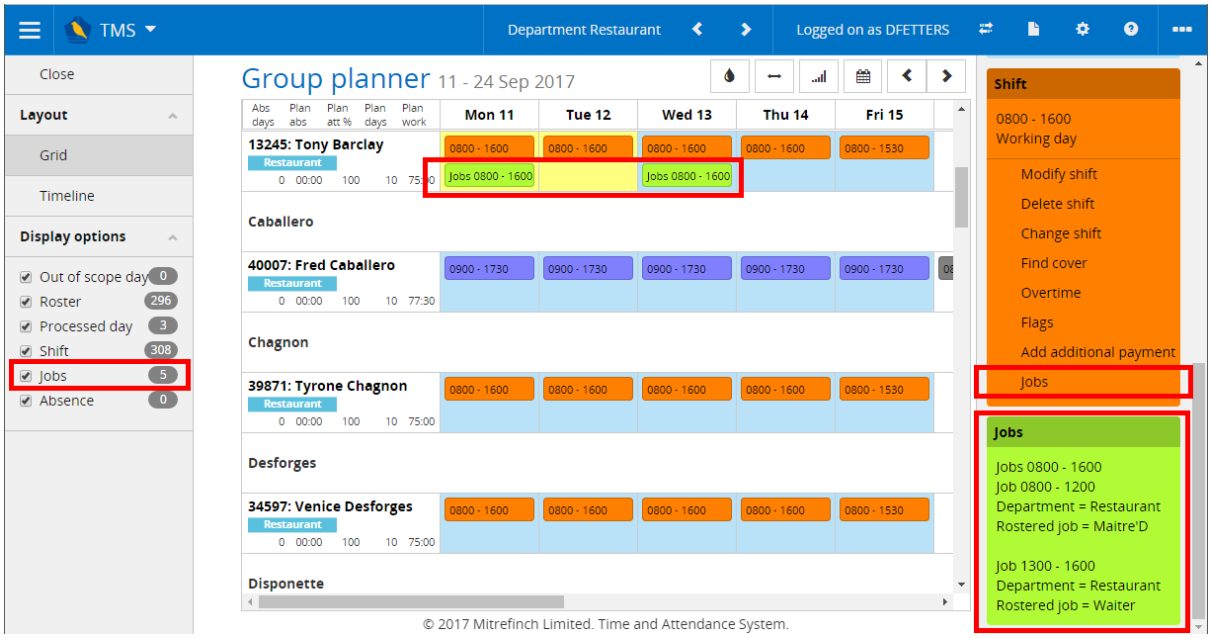


Figure 52: Group planner – jobs

As can be seen in Figure 52: Group planner – jobs, a new Calendar data type called Jobs has been added which shows the jobs associated to the employee and shift which shows within the day and as a detailed tile when selected. Jobs are viewed and maintained through the new Jobs shift action.

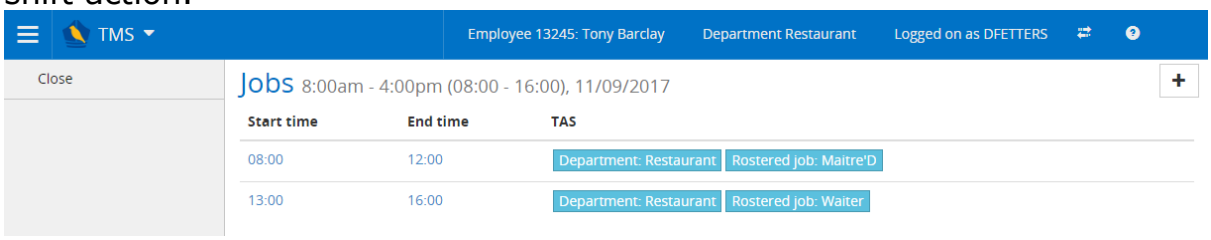


Figure 53: View and maintain jobs from the Shift

The Clock card > Work record > Jobs page has been updated to reflect the new jobs UI.

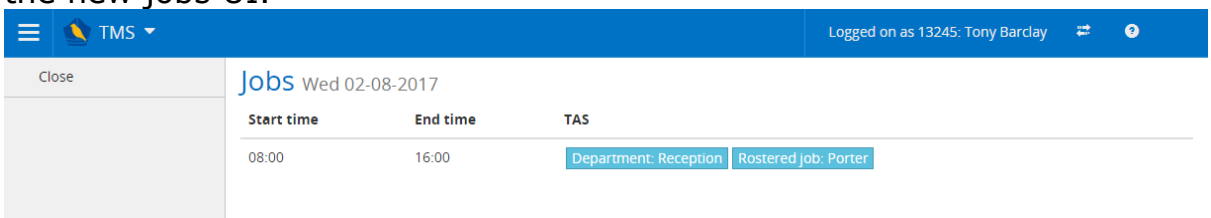


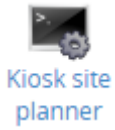
Figure 54: Work record processed jobs

38 Release 8.17.10

38.1 Enroller

Use of the Enroller now requires an 'ENROLLER' system licence.
When the Clock kiosk has been licenced and user has the menu right System > Kiosk site planner (web only), then the Enroller installer builder

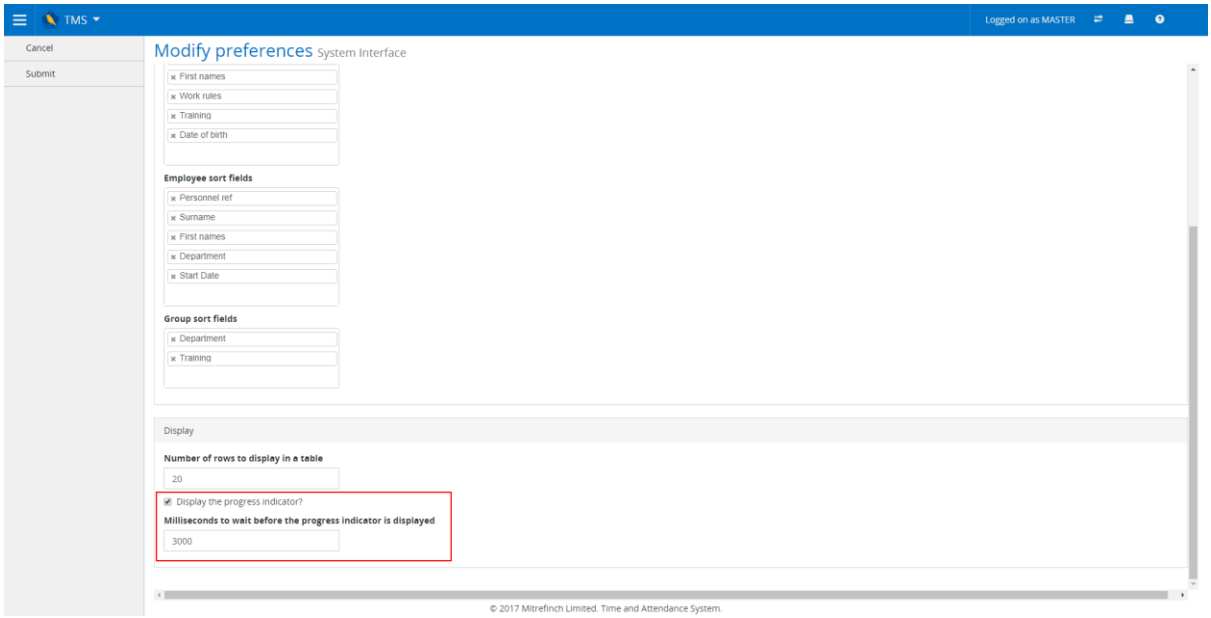
is available via the Kiosk site planner > Prepare install page.



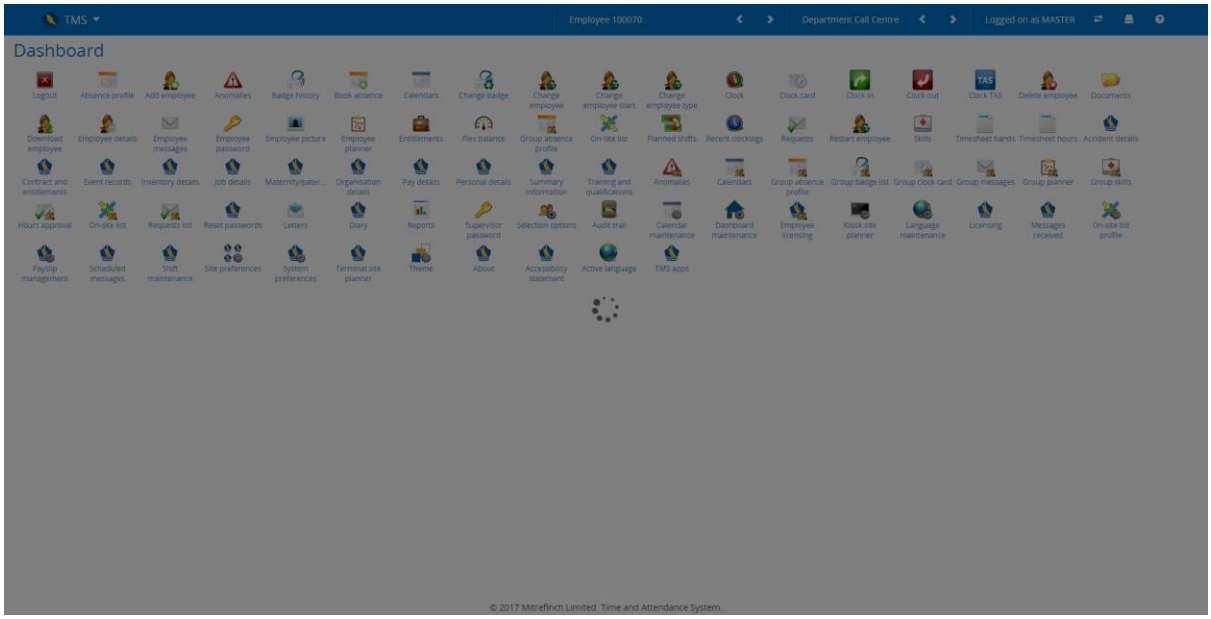
When the Clock kiosk has **not** been licenced, then the Enroller installer builder is available via Build enroller installer when the user has the menu right 'Fingerprint enrolment'.

38.2 Progress Indicator

This feature is configured through the System Preferences > Interface screen.



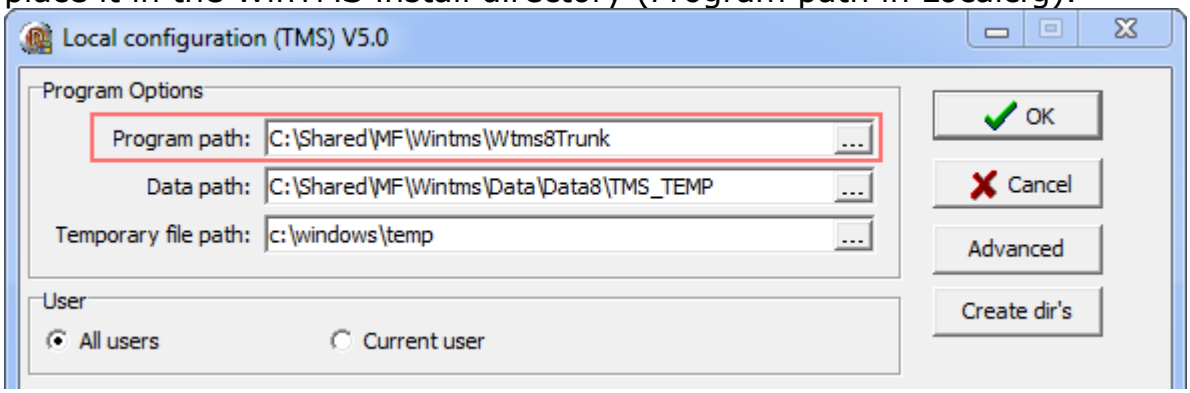
Check the 'Display the progress indicator?' field to enable/disable. Enter a numeric value into the 'Milliseconds to wait before the progress indicator is displayed' textbox. Minimum and maximum millisecond values are 1000 and 10000 respectively.
Upon activation the Progress Indicator will overlay the current page, as displayed in the dashboard example below.



A dashboard with custom tabs will display a Progress Indicator within each of the internal widgets e.g. Entitlements. Any external widgets will not display a Progress Indicator e.g. BBC News.

38.3 WinTMS Help

The WinTMS 'Help' option now links to a PDF User Manual. New installs will have the PDF in place upon install. For existing installs, download the file http://www.mitrefinch-support.com/downloads/documents/WinTMS_8_User_Manual.pdf and place it in the WinTMS install directory (Program path in Localcfg).



39 Release 8.18.0

39.1 Budgets feature

The Budgets feature is now available, which includes:

- Budget maintenance;
- Group budget display;
- Employee budget display.

For more detail see the TMS8 User Guide.

39.1.1 Budget maintenance

Access to Budget maintenance can be granted via *WinTMS\System\Maintain users\Profiles\Modify\Menu rights\TMS\Future work planner\Maintain budget values.*

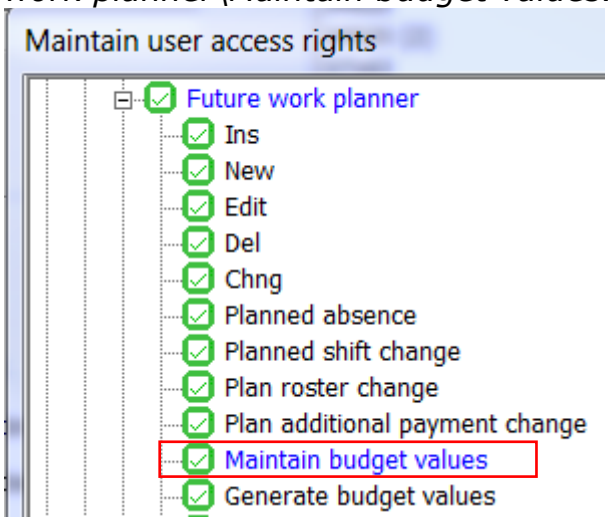


Figure 55: Group budget maintenance permission.

TMS8 will display a Dashboard shortcut to the Budget maintenance feature, see below.

Figure 56: Budget maintenance Dashboard shortcut.

Budgets can be configured at a system level to be either cost or hours based, see *TMS8\System preferences\Planner budget\Group budget\Budget by*.
The Budget maintenance feature allows group budgets to be declared for a combination of group and date range. For example, Development department has a budget of £10,000 for the week commencing.
The Budget maintenance home page will display a list of budgets that intersect the display date range, see below.

Figure 57: Budget maintenance home page.

From the home page you can navigate, create, modify and delete budgets. The modify action includes the ability to copy a budget forward a number of times.

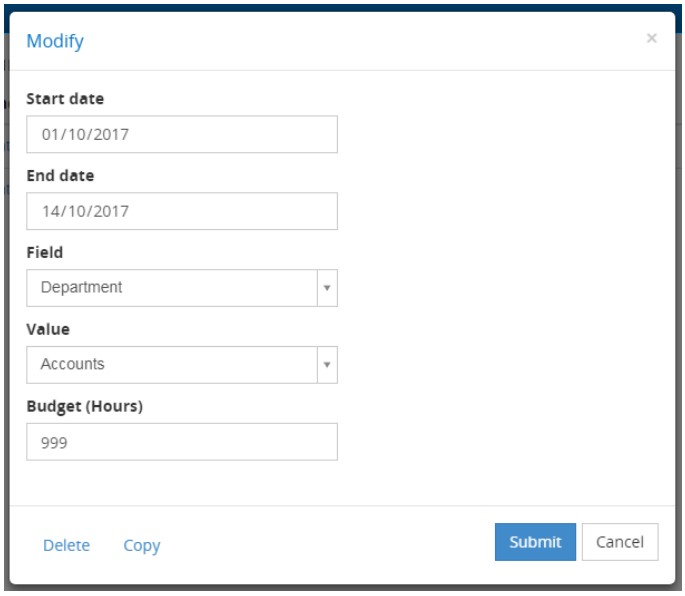


Figure 58: Modify budget page.

39.1.2 Budget display

Budgets are displayed on the Group planner.

- To display a Group budget select the total names cell in the top left of the planner. The Group budget will be displayed in the right navigation pane.
    - Select the Group budget total to be redirected to the Budget maintenance page from where you can insert a new budget.
- Employee budgets are displayed under each employee.

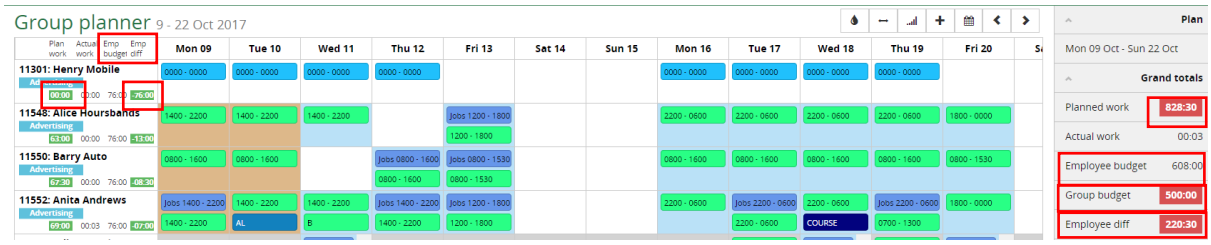


Figure 59: Group planner display group and employee budgets.

39.2 Licence changes for Jobs, Availability, Find cover and Budgets

Jobs, Availability, Find cover and Budgets are now active when either of the following licence conditions is met:

1. 'Legacy' system level licence (all employees are available for the stated features)
2. 'Scheduling' system level licence with per employee checks against employee 'Scheduling' licence

Rostering and Rostering self-service (ESS) are now no longer used and should not normally be included. A licence is considered unsupported (an invalid) when it includes both 'Legacy' and 'Scheduling'.

40 Release 8.18.1

40.1 On-site list colour preferences

The colours used in an on-site list may now be changed in Modify On-site List. A Colour preferences section appears with colour pickers and buttons to select Standard and Bold colour schemes. The Bold colour scheme is selected by default.

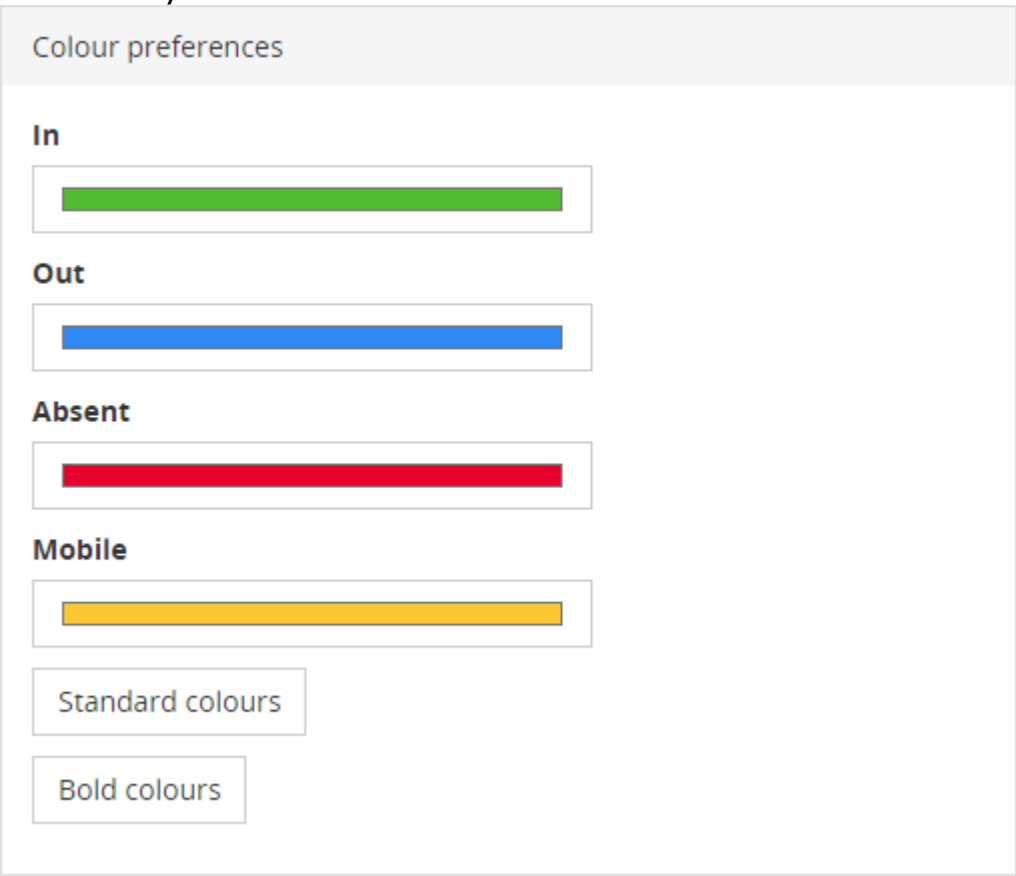


Figure 60: On-site list colour preferences

41 Release 8.20.0

41.1 Hard stops at the terminal

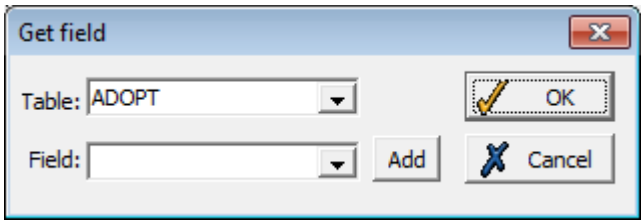
Functionality has been added to enable clockings to be prevented outside the shift times assigned to an employee. See the document ***Hard Stops on the Mitrefinch Terminal*** for more information.
This functionality is disabled by default, employees will not be prevented from clocking unless it is explicitly enabled. To use this feature, version **7.45.4** or greater of the Mitrefinch Terminal firmware is required.

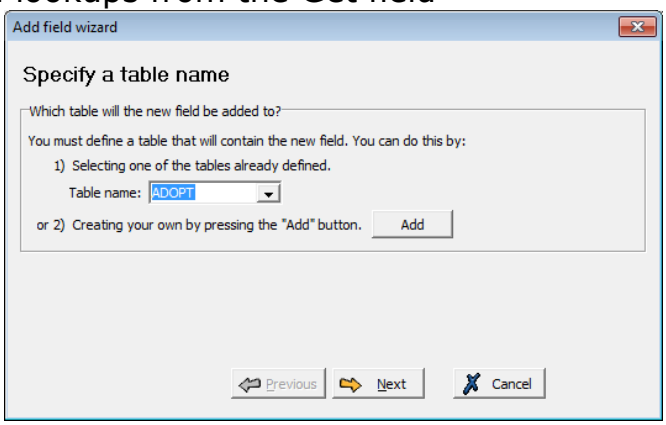
41.2 Calcs NEXTPERST function

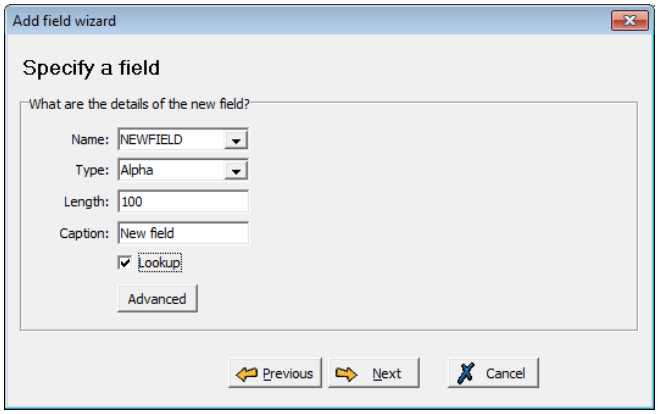
A NEXTPERST function has been added to the calcs. This function accesses the start of the next pay period.

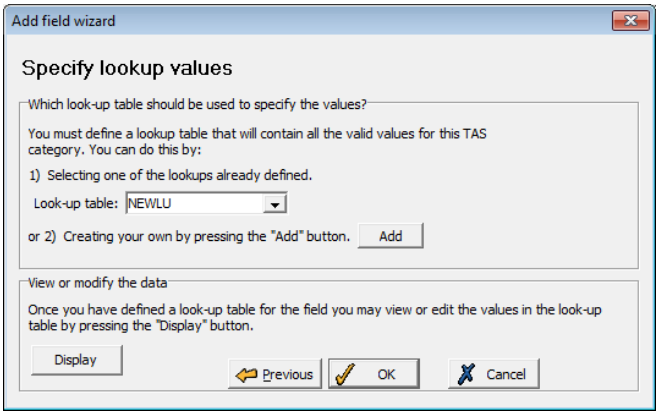
41.3 Migration Tools and Licensing

Changes to the migration tools and licensing have been merged in this version. It is now possible to add licences to TMS using sysgen.exe or via command line. In DBDEF, multiple screen components may be selected and then dragged to another location as a group. When adding components onto a panel, a wizard has been added to allow the Implementer to add new tables, fields and lookups from the Get field window.









Figures 61-64: Adding components to a panel

42 Release 8.20.1

42.1 Job planner nesting

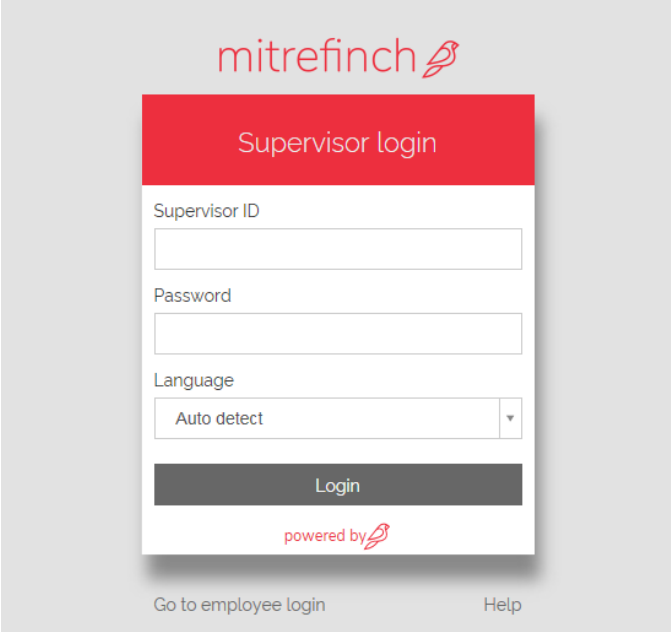
Jobs are now nested beneath the relevant Shifts in the Calendar.

Figure 65: Shift with Jobs nested underneath

43 Release 8.21.0

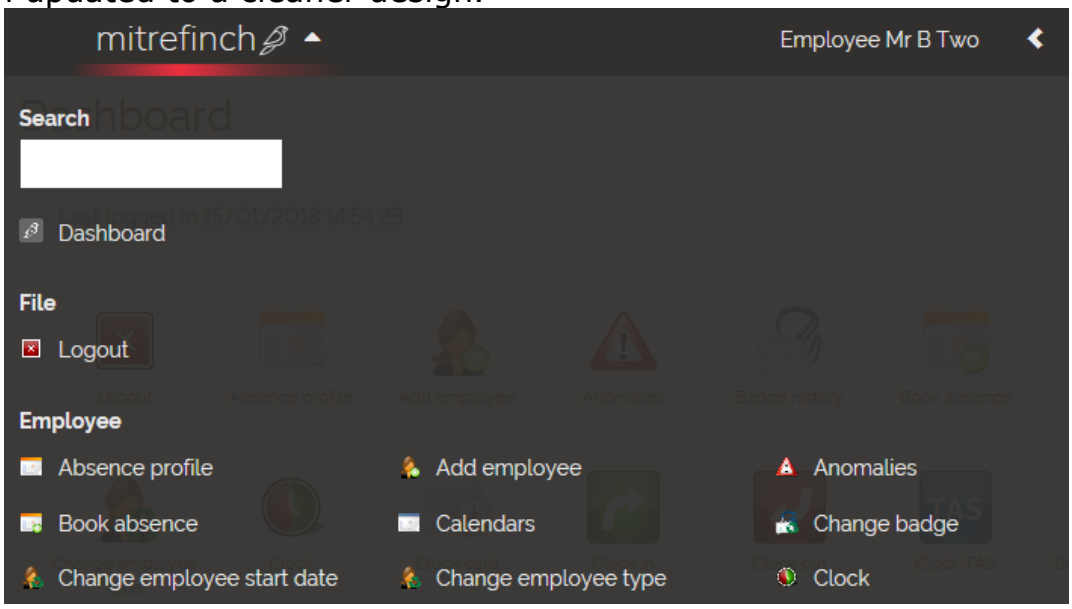
43.1 UI changes for Mitrefinch rebrand

There have been assorted minor changes to the TMS8 UI following the company rebrand.



Existing themes will be respected using the same colours as before, but the default *System* theme has changed to reflect the new red and grey colours of the Mitrefinch branding.

There are also small improvements to the layout of some pages, for example the drop-down menu at the top of the page will now display icons across the full width of the screen, and the calendar screens have been updated to a cleaner design.



43.1.1 Custom themes

Any existing custom themes will need to be rebuilt in order to correctly apply the custom colours in all applicable places. To do this, navigate to **System -> Theme**, click on the name of your custom theme, then press **Submit**.

Depending on the content of your themes, users may need to refresh the page to see the changes take effect.

43.1.2 Using custom logos

Custom corporate branding can now be applied to TMS by simply adding your corporate logo files into the web directory.

To replace the logo on the login screen, open the **images** subdirectory, and replace **login-logo.png**.

To replace the logo on the menu drop-down button at the top of the screen, create **customlogo.svg** or **customlogo.png** in the **images** subdirectory.

44 Release 8.21.1

44.1 Web preference cache updates

A new "PreferencesUpdated" preference has been added, which stores a date/time value. When a check is performed in the Task scheduler, the locally stored version is compared with a copy from the database. If the database version is more recent than the system version, the system clears and reloads the cache.

45 Release 8.22.1

45.1 Mobile/Outlook App Login Credentials

Following the upgrade, customers using the mobile or Outlook app for TMS will need to re-enter their login credentials. This is due to changes in the way passwords are stored.

46 Release 8.22.2.1

46.1 New Data Assurance module

The new Data Assurance features are designed to aid users in achieving their data retention policies and require a new license to be issued. For an overview of the functionality, consult the Training Videos and Training Documentation.

46.2 Command line parameters – PEREND custom setting

A new "C" parameter allows a custom number of days to be specified for PEREND. For example, to configure an eight-day period, enter PERIOD=C8.

46.3 Dashboard Widget rebranding

Widgets can now use the new rebranding colours.

47 Release 8.22.3.0

47.1 Custom calculations – new functions

Two new functions have been added to custom calculations. These are CLKPLATFORM (clocking platform) and CLKSOURCE (clocking source).

48 Release 8.22.4.0

48.1 Cookie expiry period increase

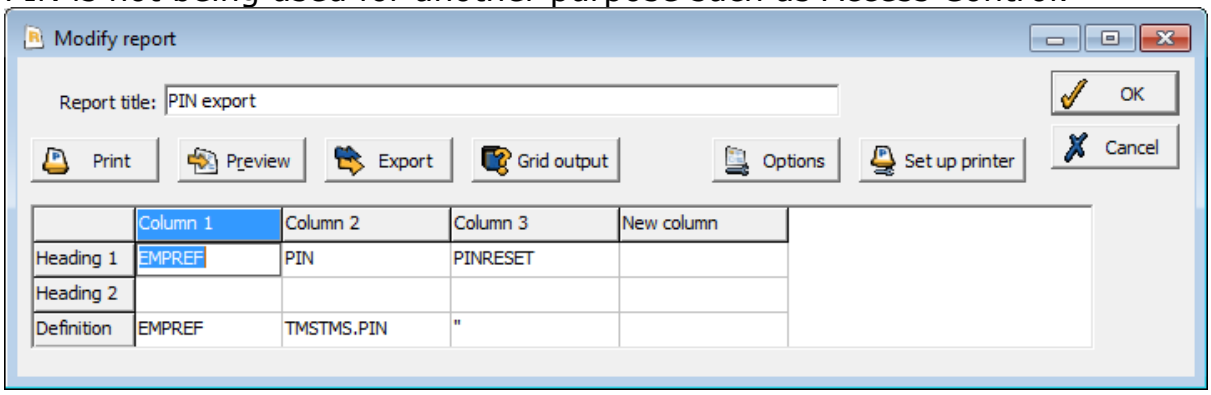
The cookie expiry period has been increased from 24 hours to 30 days. This is following a request for the Group Planner to remember a user's selection for the period to display.

48.2 Convert employee PINs to passwords

This feature allows Implementers to migrate employee logins from the old system of using TMSTMS.PIN, to the new salted and encrypted password system. To do this, follow the steps below.

1. **Create a Repgen export of current employee PINs**

A RepGen report must be created to import the PINs into the password field. This report should include the empref and PIN. It is also recommended to include a blank pinreset field that can be used to clear the pin number at the same time, as it stored in plain text in the database and may no longer be needed. However, this should only be done if the PIN is not being used for another purpose such as Access Control.



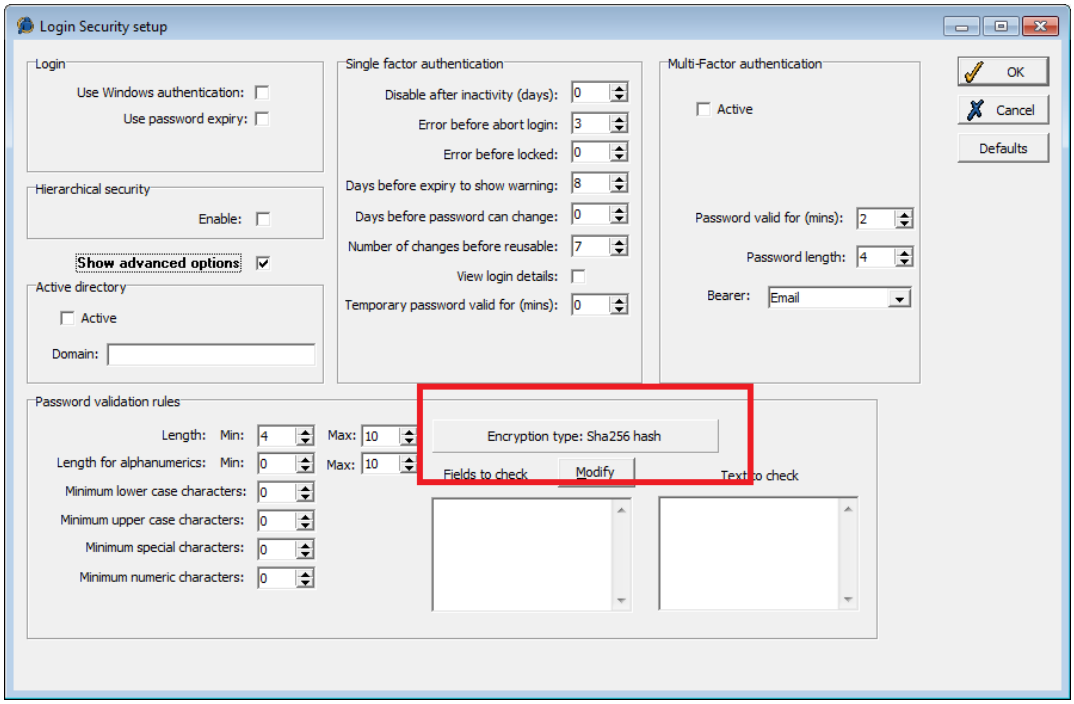
Export the report as a CSV file.

2. **Ensure the employee web profiles have access to Change Password (TMS Version 8 only)**

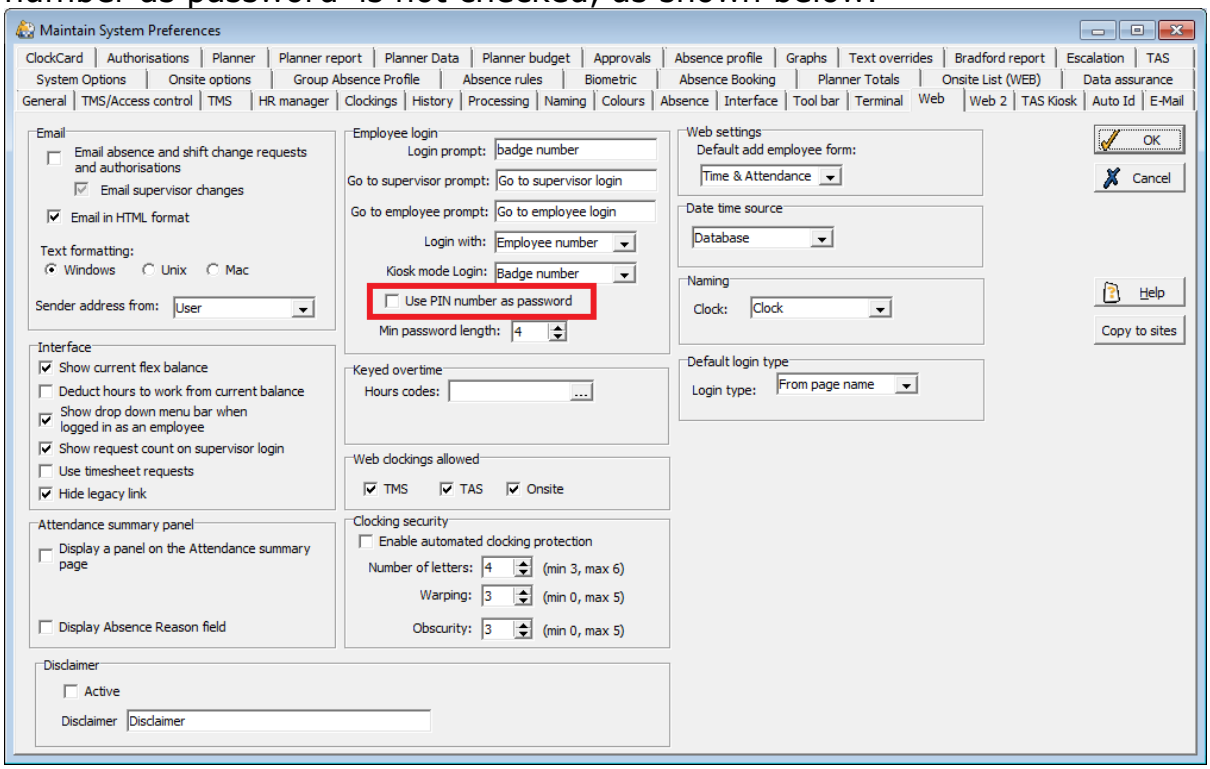
The employee must have access to this option, as they will have to reset their password upon first login. If they don't the employee login will fail with a 'login failed' message.

3. **Change the preferences**

Two preferences must be set for the new password to work correctly. The first is Maintain users – System – Login Option. Tick 'Show advanced options' and then check that the Encryption Type is set to 'Sha256 hash' as shown below.

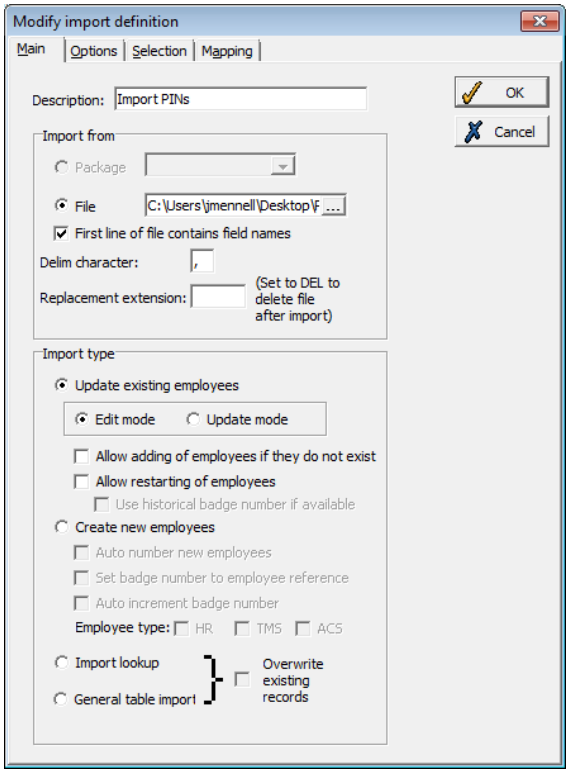


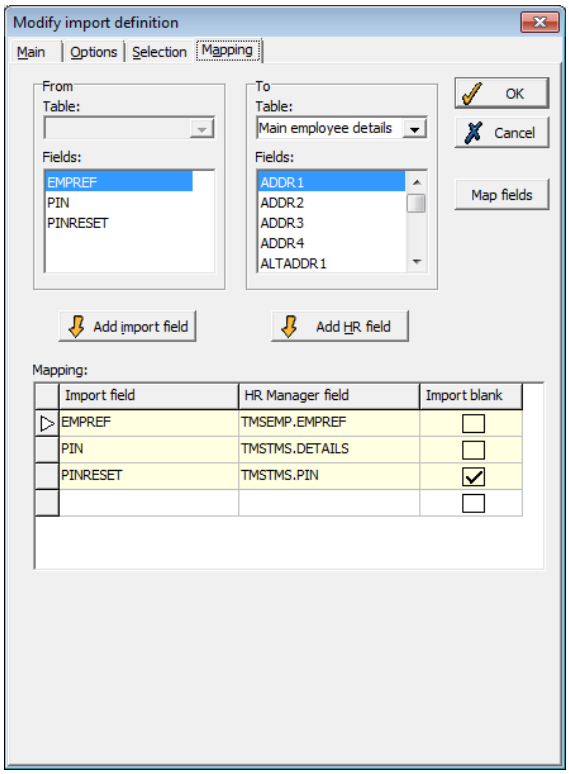
The second preference is required to make the system use the new password rather than the old PIN. This can be found in WinTMS – System menu – Maintain system preferences – Web tab. Ensure that 'Use PIN number as password' is not checked, as shown below.



4. **Create an import definition**

Open Import.exe and select Add. Create a new employee import as shown below.





5. **Run the import**

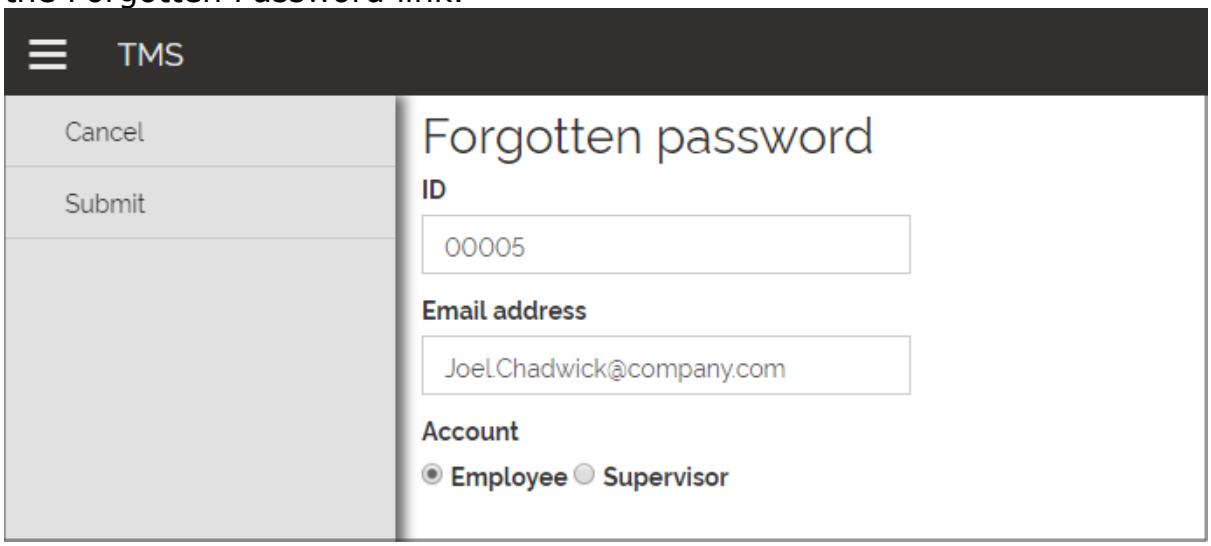
Run the import definition. The results can be checked by verifying the following:

- Check that the TMSTMS.PIN field is now empty.
- Check that the TMSTMS.ISTEMPPASSWORD is set to 'Y'.
- Check that entries have been added to the TMSDETAILS for each employee. Note that the SALT field will not be set at this point; this will be applied at the next login.

49 Release 8.23.0.0

49.1 Self Service Password Reset

New feature allows an Employee or Supervisor to reset their own password using a generated link delivered by email. This functionality is **disabled by default**, it can be enabled using the checkbox in System preferences > Login > Self service forgotten password section (Web only).
Once enabled, an Employee or Supervisor can navigate to the Forgotten password screen by selecting the Help link on the login page followed by the Forgotten Password link.



Please see help document for more details on this feature.

49.2 'Scheduling' licence replaced with 'Rostering Lite'

The 'Scheduling' licence key has been re-named to 'Rostering Lite', all behaviour relating to the licence remains the same.

49.3 Maintain codes – TMS Lite version.

To support the release of TMS lite, a cut down version of WinTMS's maintain codes functionality has been implemented. The functionality supported in this release is: viewing a list of all codes, viewing all entries

for a code, adding an entry to a code, editing an entry for a code and deleting an entry for a code.

Maintain codes

Name	Description
ABSCSYNC	External calendars
ACCBODY	Body Part Injured
ACCCHANGER	Changes Required
ACCLOC	Accident Location
ACCSTATUS	Claim Status
ACCTYPE	Incident Type
ADDEMPFORM	Forms for adding employees
AGENCY	Agency details
ALLLOOKUPS	All lookups

49.4 Maintain users – TMS Lite version

The support the release of TMS Lite, basic functionality for Maintain Users has been added to the TMS web application. See the menu item ***System -> Maintain Users***.

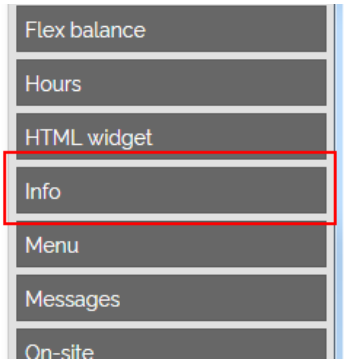
This initial release supports adding, modifying and deleting users, and changing user passwords. Some fields and options for the user records are not yet available in the web: where missing features are required, use the Windows application MODUSRP.EXE.

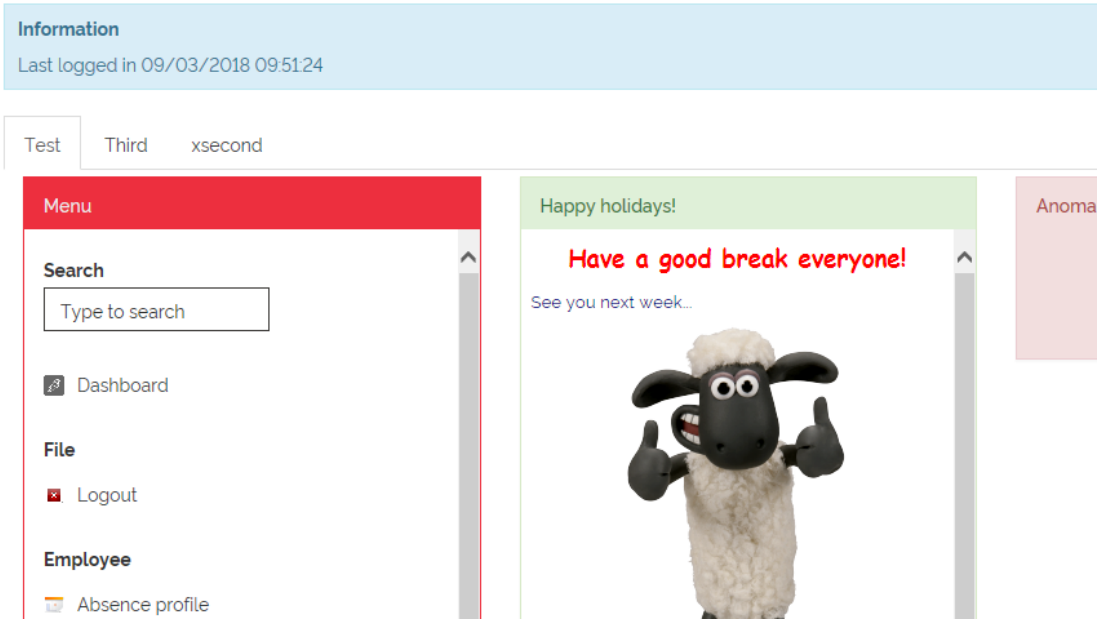
50 Release 8.23.1.0

50.1 Customisable Info Widget

A new type of widget has been added that allows custom messages to be displayed to users of your TMS system.

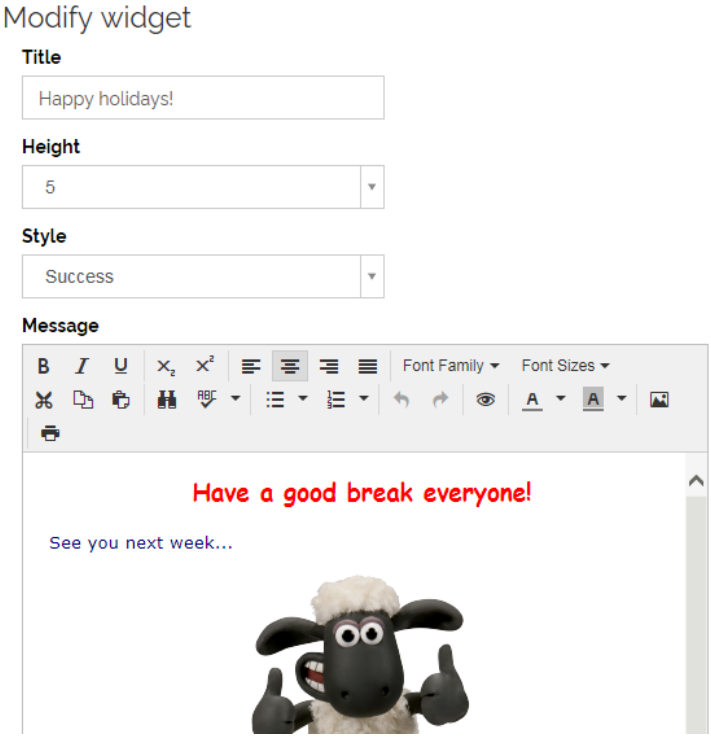
To add the widget to a dashboard tab, drag the ***Info*** widget type onto a free space on the tab.





A widget will show the same message to all employees – they cannot be customised to show the name of the employee reading the message, for example – but multiple widgets can be used to show different messages. The message is defined when setting up the widget, and can be formatted using the on-screen editor, shown below.

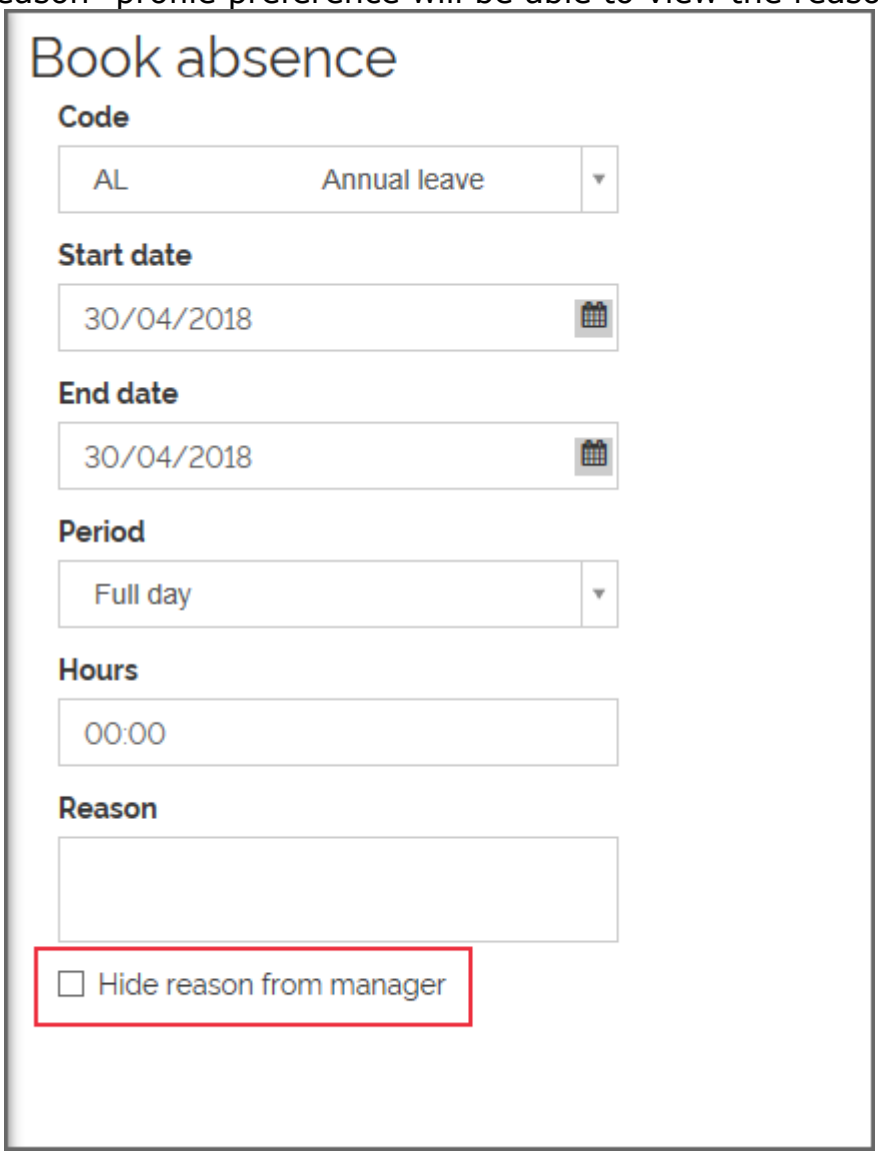
Note that images can be added, but they must be accessible through a URL – they are not stored locally by TMS. So if your TMS system is accessible over the internet, the images you use must be too.



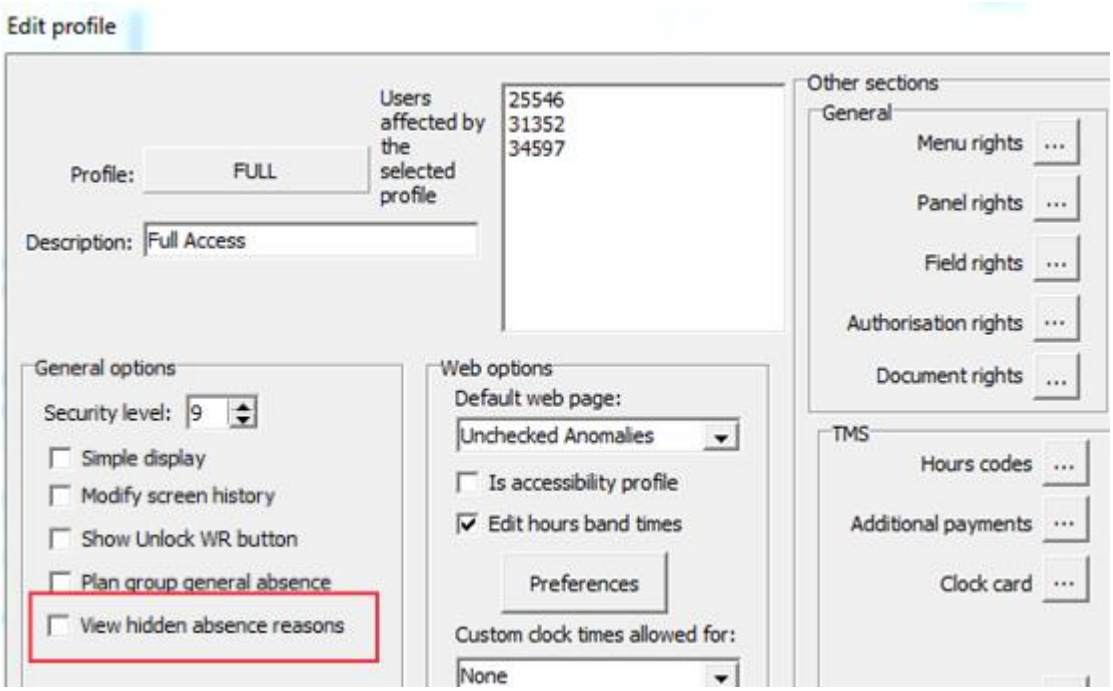
51 Release 8.24.0

51.1 Option to hide absence reason from line manager

To aid customers in achieving compliance with data protection regulations, employees will now have the option to not allow their manager to see their entered reason for requesting an absence. If this is selected when submitting a request then only users with the "View hidden absence reason" profile preference will be able to view the reason.



If this override preference is selected, the user will be able to see all employee reasons on absence requests irrespective of their selection.

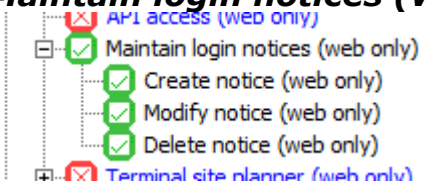


51.2 Display login notices to employees

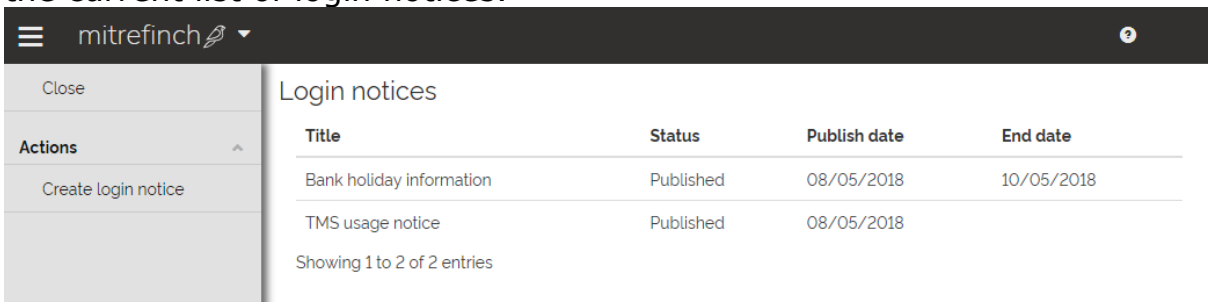
It is now possible to display a notice to employees after they log in to TMS. This notice must be accepted before they can proceed to TMS. Multiple login notices can be active at any one time – they will be displayed one after another to the employee.

51.2.1 Maintaining login notices

To define a login notice, first enable the feature on the relevant supervisor profile. In the MODUSRP.EXE application, navigate to Menu Rights and enable the ***Maintain login notices (web only)*** options.

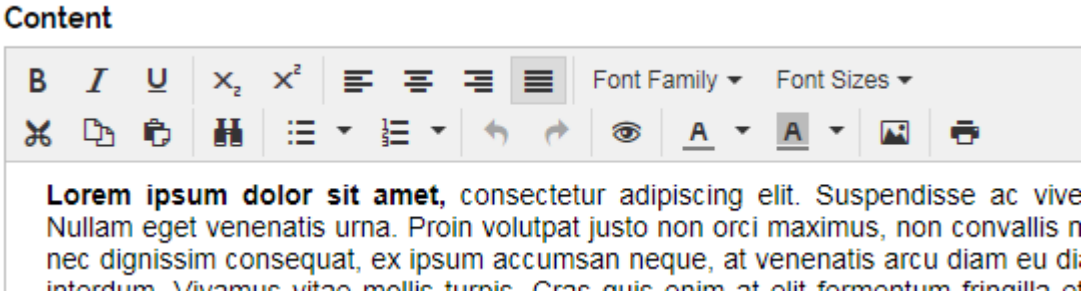


In the TMS web application, select the **Login notices** menu item to view the current list of login notices.



Create a new notice by selecting **Create login notice** from the left-hand menu. You will be prompted to give the new notice a title, a publish date, and some content. The notice will not be displayed to employees until the defined publish date.

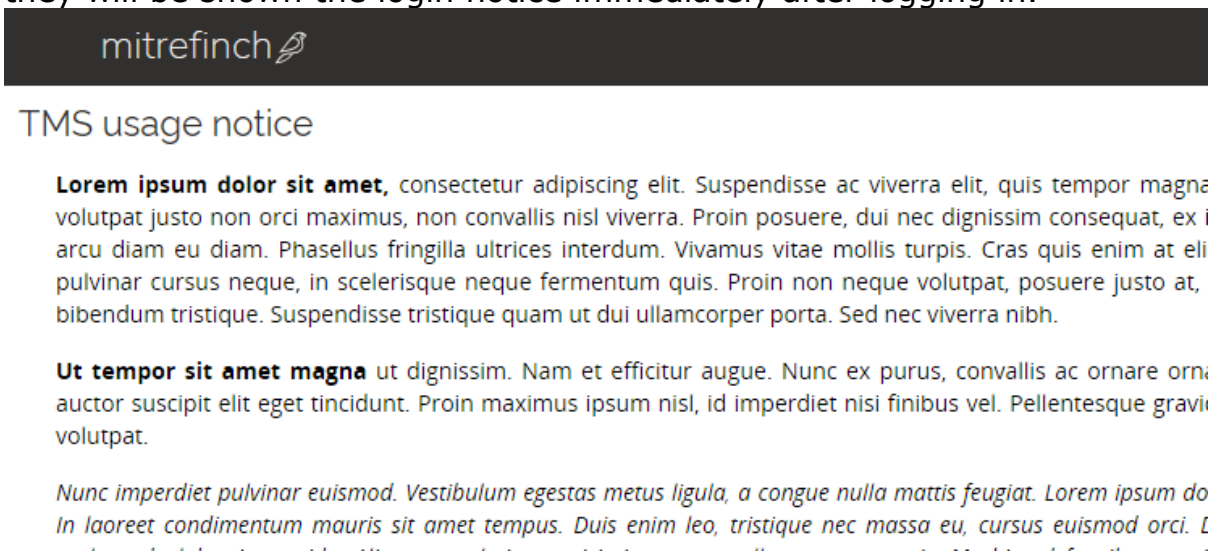
You can optionally define a response statement and an end date for the notice, after which it will no longer be displayed.
The notice content and response can be formatted to use different fonts, colours, etc. by using the formatting tools displayed on screen.



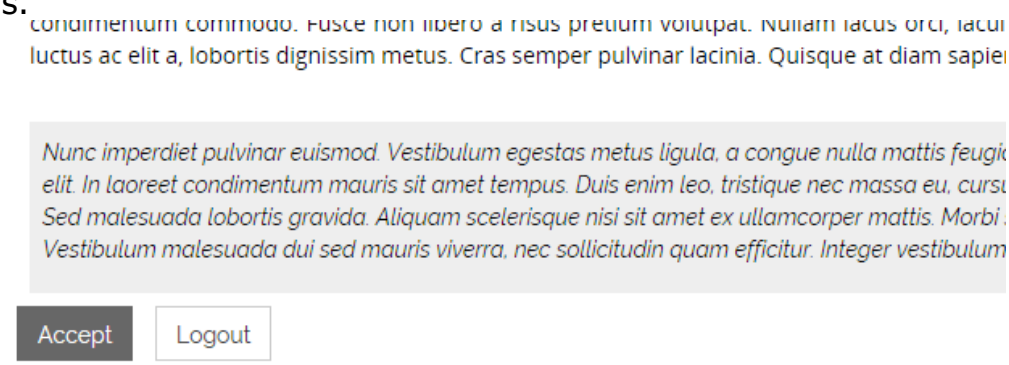
To edit an existing notice, click on the notice in the list. Note that, for auditing purposes, once a notice has been published the original record cannot be modified. Instead the original notice will be deleted, and a new notice created in its place containing the new changes.
To delete a notice, edit it then select the ***Delete login notice*** option in the left-hand menu.

51.2.2 Accepting a login notice

When an employee logs in and there is an active login notice defined, they will be shown the login notice immediately after logging in.



If a response is defined for this notice, this will be displayed underneath the main content. At the bottom of the screen are **Accept** and **Logout** options.



If the employee accepts the login notice, they will be able to access TMS. The date and time of the acceptance will be stored in the database, and this employee will not be shown this notice again.
If the employee does not accept the notice, they will be logged out of TMS and returned to the login screen. Any attempt to manually navigate to other pages within TMS will result in the notice being displayed again.

52 Release 8.24.1.0

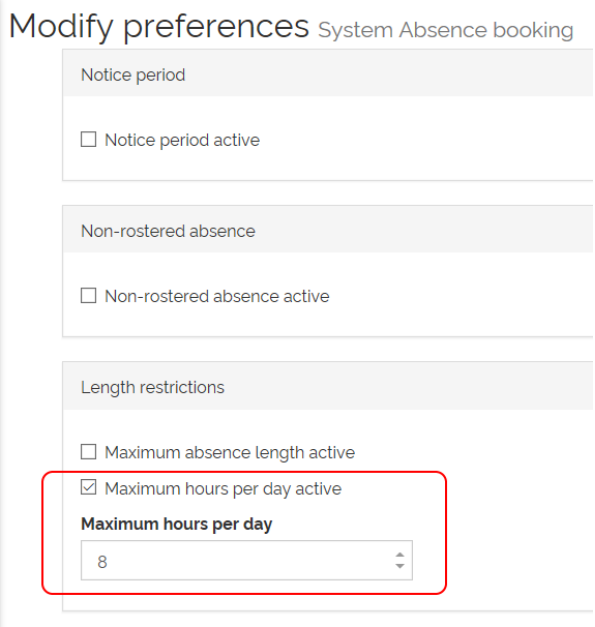
52.1 Custom data retention periods for Data Assurance

Custom data retention periods may be created and assigned to Employees to allow customers to implement their own data retention policies for their Employees. For more information, refer to the **TMS8 Data Assurance Guide**.

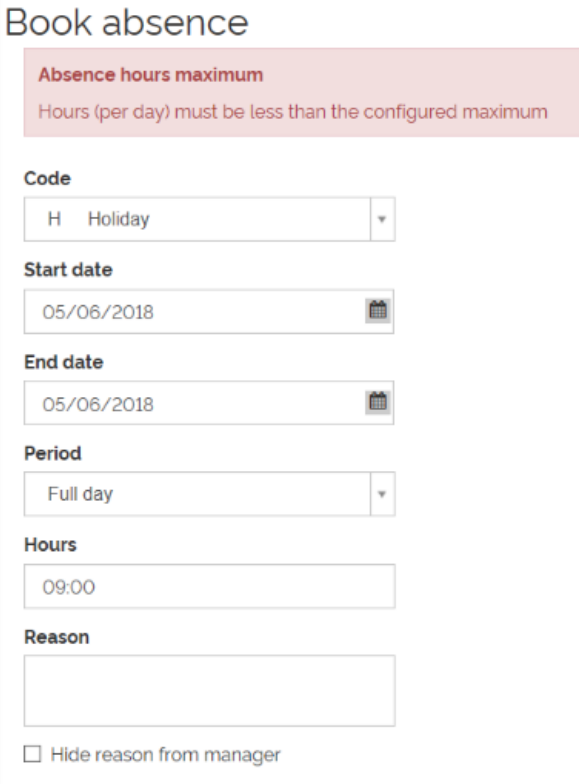
53 Release 8.24.2.0

53.1 Restrict number of hours per day entered when booking absences on non-working days

A limit can be assigned to the Hours field on the **absence booking** screen when booking an absence on a non-working day. This prevents users from entering incorrect values; for example, if they try to enter 40 hours for a week's absence (which the system interprets as 40 hours per day), they may be restricted to 8.
Activate and configure the limit in **System preferences > System Absence Booking**.



If an employee enters a value higher than the specified maximum hours, a warning message appears.



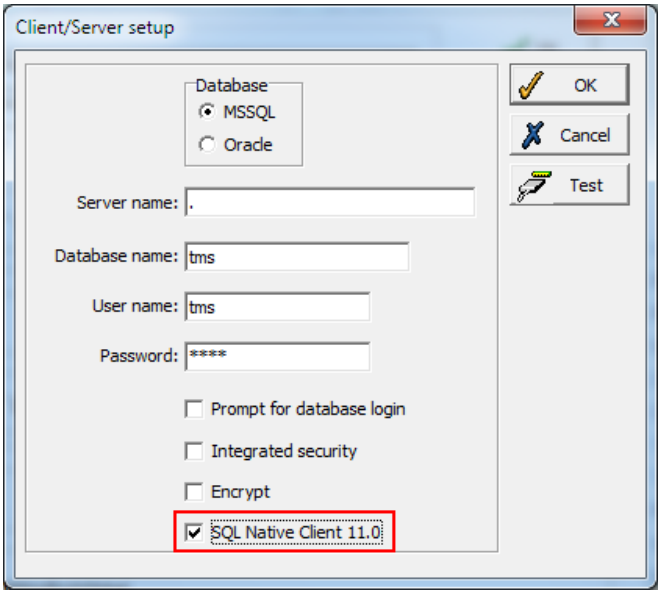
54 Release 8.25.0.1

54.1 Support for TLS 1.2 in Windows applications

TMS for Windows can now run against databases on systems where either the client or the server requires the use of TLS 1.1 or 1.2 encryption during database authentication.
The TMS web application is not affected, it already supports database connections using TLS 1.2.

54.1.1 Client updates

Supporting the newer encryption methods requires **SQL Native Client 11**, which received support for TLS 1.2 around version 11.0.5592. It is recommended that you update to the current version of the client anyway, which can be downloaded from https://www.microsoft.com/en-us/download/details.aspx?id=50402
Also ensure that you are using the current version of the database driver bundled with TMS, ***dbexpsda40.dll***. This should have happened automatically when you ran the installer or extracted the executables, but if you performed the process manually check that you have version **7.4.6.0** of this file.
When this is installed, you must configure TMS to use the native client. To do this, run an up-to-date copy of **localcfg.exe**. A new option is available, ***SQL Native Client 11.0***.



When this option is checked, all the Windows TMS applications will attempt to use the SQL Native Client for database connections, instead of the standard OLE database driver.

54.1.2 Server updates

Ensure that your installation of SQL Server has been updated to a version that supports TLS 1.2. See https://support.microsoft.com/en-us/help/3135244/tls-1-2-support-for-microsoft-sql-server for a table of supported versions.

54.1.3 Windows updates

Depending on the version of Windows you are running, on both the client and the server, you may need to make registry changes to support TLS 1.2. See https://docs.microsoft.com/en-us/windows-server/security/tls/tls-registry-settings for a guide to the relevant settings in the registry.

55 Release 8.25.2

55.1 Support for employee PIN in Messaging

When using messaging to send data into TMS, employees can now use their PIN to authenticate instead of their password. This is to avoid having to enter a password in an insecure form, and to restore the functionality that was present in TMS version 7.
To allow use of the PIN, enable the preference Allow employee PIN in the Messaging preferences section.
When this is enabled, employees may still choose to use their password if they prefer.

56 Release 8.25.4

56.1 Removal of mass reset of passwords

This functionality has been removed in this release. Please refer to section 49.1 for further details of the alternative method, forgotten password.

56.2 Return user to login page following session timeout

When the TMS web application is configured to use forms authentication, a user (supervisor or employee) will now be returned to the login page immediately when a timeout occurs due to inactivity. The user will then need to provide their login credentials to return to the application. This is to protect data that may otherwise be left on display following a timeout. Forms authentication timeout is configured in **web.config**.

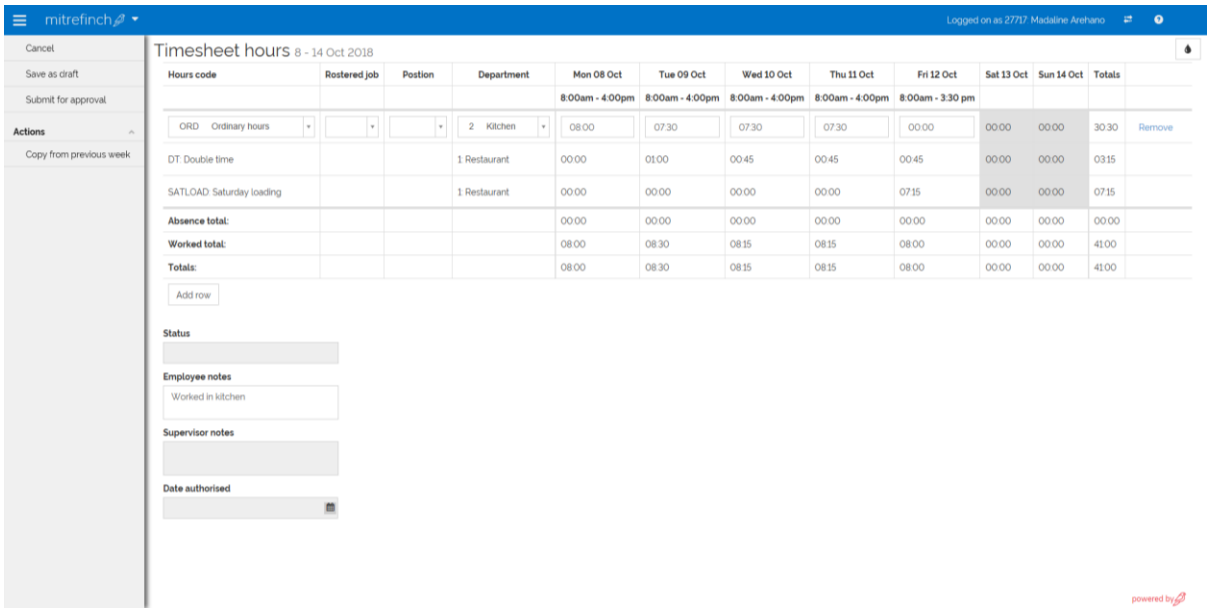
57 Release 8.26.0

57.1 Timesheet hours enhancements

The **Timesheet hours** feature has been enhanced to support TAS data entry and timesheet approval by supervisors. A supervisor **Timesheet summary** screen and dashboard widget have been added.

57.1.1 Employee timesheets

Access to **Timesheet hours** is controlled by **Timesheet number of hours profile permission** and can be found in the 'Employee' section of the TMS main menu.
When a timesheet for a week is viewed, it will contain any existing hours data from TMS **work records** on the relevant dates.



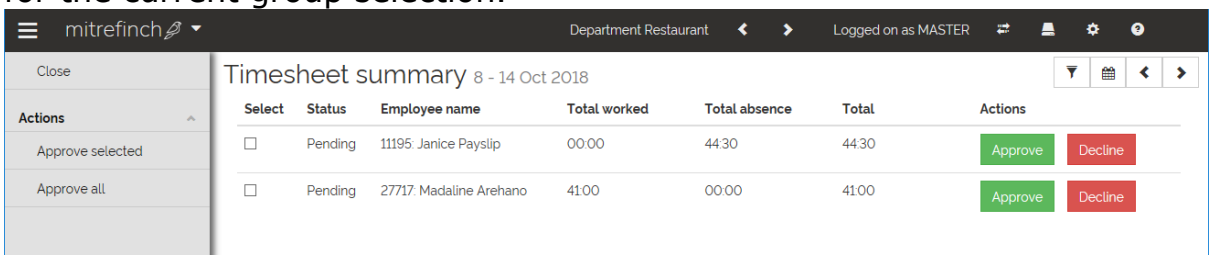
Data in a timesheet can be modified providing the work records are not **locked** or cut-off by **period end**. Any work record that has a 'pending'

request from TMS will be read only in the timesheet until the request is approved or rejected. A day that does not have a work record will be read-only in the timesheet. Certain **hours codes** or **TAS categories** may be read-only or hidden according to the employee profile setup.
Employee modifications to a timesheet can be saved as draft until ready to submit and draft work record data is shared with the **Clock card** feature. When **Submit for approval** action is selected, a timesheet request will be created and the timesheet will remain in the state 'pending' until the request is approved or declined by a supervisor. If the employee has **Clock card auto-auth** permission for all hours codes that have been modified in the timesheet, then it will be approved automatically.
Work records that are included in a pending timesheet request will become read-only in the **Clock card** until the timesheet request is approved or declined.
Copy from previous week action copies the hours codes and TAS categories that were used in the timesheet for the previous week, but not the recorded hours. Hours data must be entered manually by the employee in this case.
Timesheet preferences include:

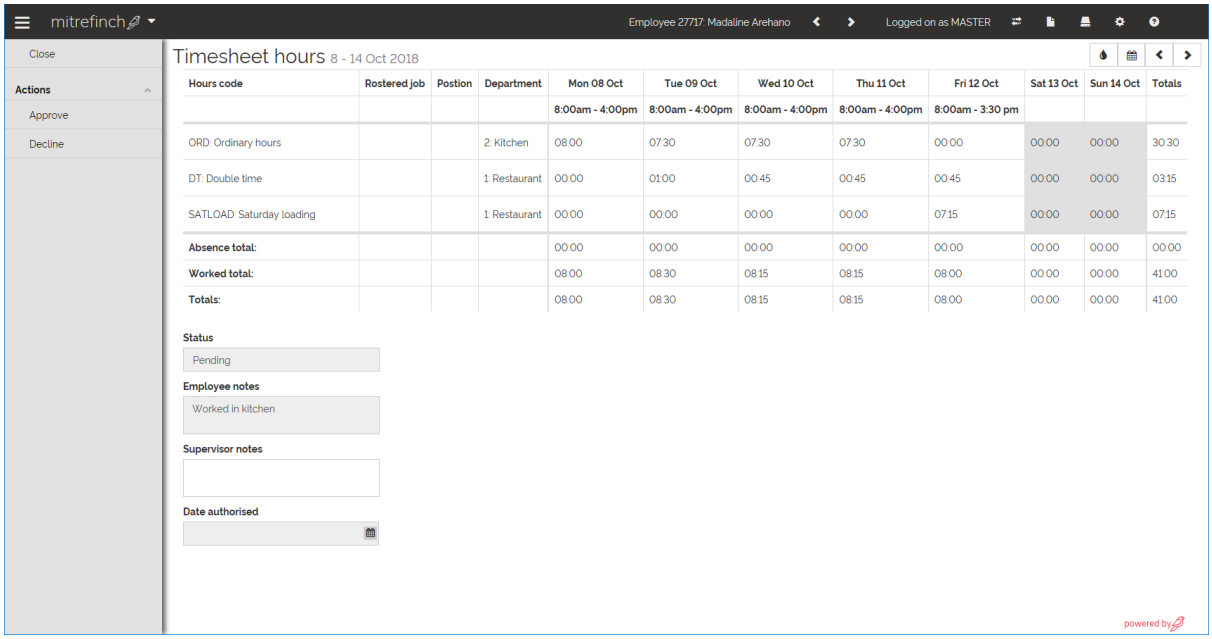
- **TAS group to display** – configure the TAS categories that are displayed on timesheet using TMS TAS group feature.
- **Allow future draft work record (days)** – number of days into the future that timesheets can be modified and submitted for.
- **Display zero values** – choose whether 00:00 is displayed on a timesheet or hidden for clarity.

57.1.2 Supervisor approval

A supervisor with **Timesheet approval** profile permission can access the **Timesheet summary** screen from the 'Group' section of the TMS main menu. This screen displays an overview of timesheet requests for a week for the current group selection.



Worked and absence **hours codes** to display can be customised in Timesheet summary preferences. There is also a preference to lock work records when a timesheet is approved.
A supervisor can approve or decline multiple timesheets from this screen or select an employee name for a detailed view of the timesheet (shown below). A timesheet can only be approved when all days within it have been processed in TMS.



If a timesheet request is declined then the data within it will be set back to draft status. This enables an employee to make further changes and resubmit the timesheet. A supervisor with **Timesheet approval profile permission** will not see draft data when viewing a timesheet.

57.1.3 Supervisor modification of timesheets

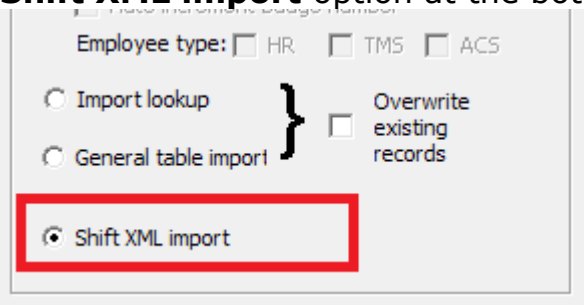
A supervisor with profile permission for **Timesheet approval** and **Timesheet number of hours** can modify data in a timesheet that is not in state 'pending'. The supervisor can then select **Save and approve** action to save the modifications and mark the timesheet as approved.
A supervisor with profile permission for **Timesheet number of hours** but without **Timesheet approval** is treated as a special case (i.e. a 'timesheet entry clerk'). This supervisor is able to see draft data in timesheets and can modify and submit timesheet requests on behalf of an employee. They cannot approve or decline a 'pending' Timesheet and cannot access the Timesheet summary feature. Note: Profile permission for **Request list** feature will need to be denied to prevent the supervisor from accepting/rejecting timesheet requests.

57.1.4 Timesheet requests widget

A new widget, **Timesheet requests** is available to add to a supervisor dashboard. It displays the number of pending timesheet requests within a configurable period and provides a shortcut to the **Timesheet summary** screen when selected.

57.2 Shift import from XML files

Functionality has been added to IMPORT.EXE to allow planned shift changes to be imported from XML files. This allows an employee's shifts in TMS to be planned externally and imported in bulk.
To use this feature, create a new import definition and select the new **Shift XML import** option at the bottom of the form.



The import file must be an XML file with the root node *EmployeeShifts*, then broken down by *Day*, *Employee*, and *Shift*, as in the example below.

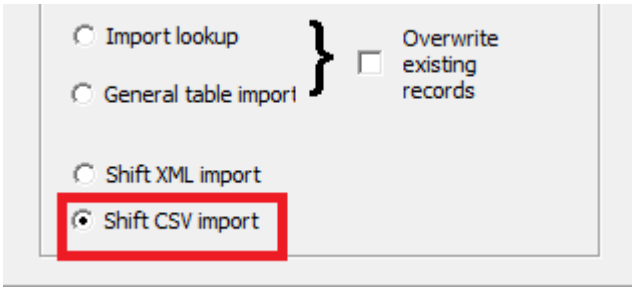
```
<?xml version="1.0" encoding="UTF-8"?>
<EmployeeShifts>
	<Day date='2018-11-24'>
		<Employee ref='000003'>
			<Shift ref='1000-1500'/>
		</Employee>
		<Employee ref='000004'>
			<Shift ref='1000-1500'/>
		</Employee>
	</Day>
	<Day date='2018-11-25'>
		<Employee ref='000002'>
			<Shift ref='1000-1500'/>
		</Employee>
		<Employee ref='000008'/>
	</Day>
</EmployeeShifts>
```

For full details on this feature, see the separate document ***Shift import XML format.docx***.

58 Release 8.26.1

58.1 Shift Import from CSV files

Functionality has been added to IMPORT.EXE to allow planned shift changes to be imported from CSV files. This allows an employee's shifts in TMS to be planned externally and imported in bulk.
To use this feature, create a new import definition and select the new **Shift CSV import** option at the bottom of the form.



The import file must be an CSV file broken down by *Day*, *Employee*, and *Shift*, as in the example below.

2018-11-24,000002,0900-1700
2018-11-25,000003,1000-1500
2018-11-26,000004,1000-1500

The headers *Day*, *Employee* and *Shift* do not need to be included in the CSV file.

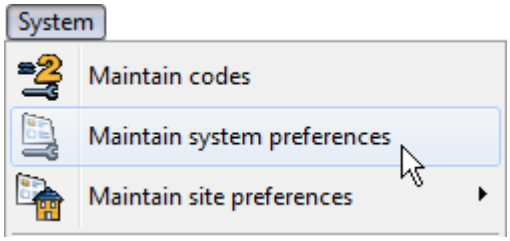
59 Release 8.26.2

59.1 Current shift clock card

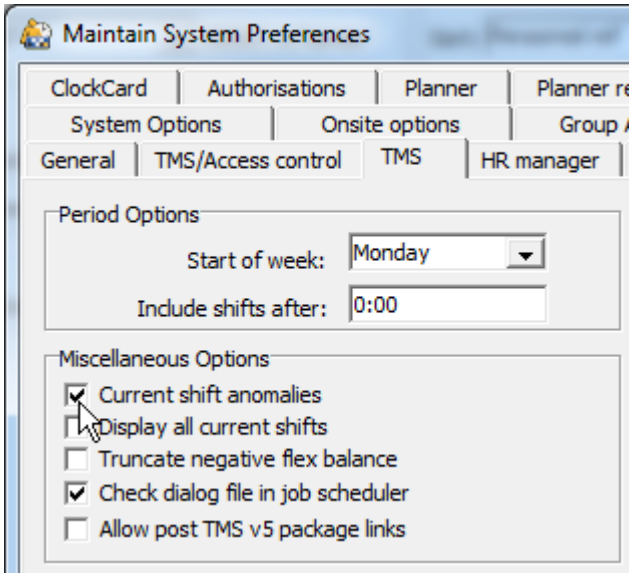
Current shift clock card allows you to process a shift while it is still in progress. This allows any changes to an Employee's working hours to be made before the end of the shift.
Current shift clock card is useful in situations where full shift information is needed quickly for reports or payroll. It also allows Supervisors to fix Employee anomalies during a shift instead of waiting until the shift ends.

59.1.1 Configuration

Current shift anomalies must be activated to use **current shift clock card**. To activate this setting, log into WinTMS. Open the **System** drop-down menu and select **Maintain system preferences**.



Select the **TMS** tab and ensure that **Current shift anomalies** is ticked.

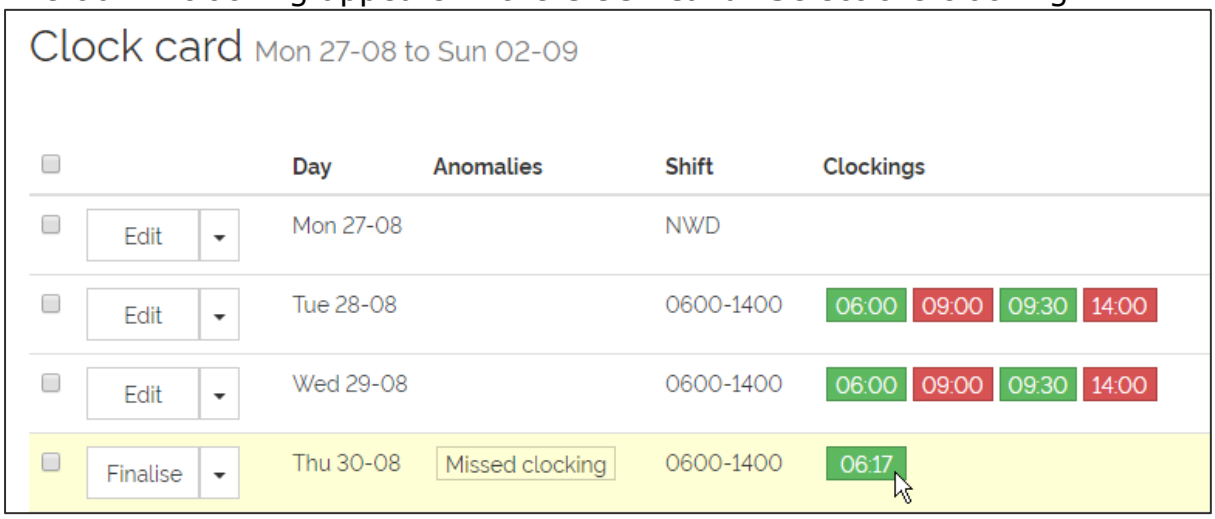


59.1.2 Using current shift clock card

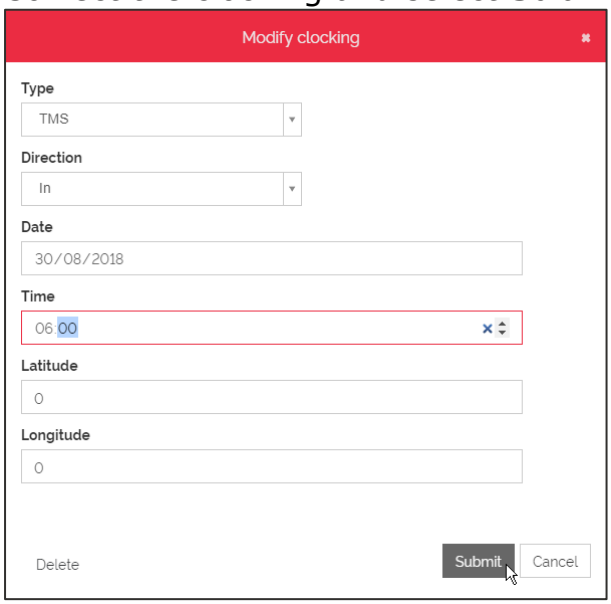
Current shift clock card allows a shift to be modified in the **clock card** while the shift is still in progress.

59.1.3 Changing clockings

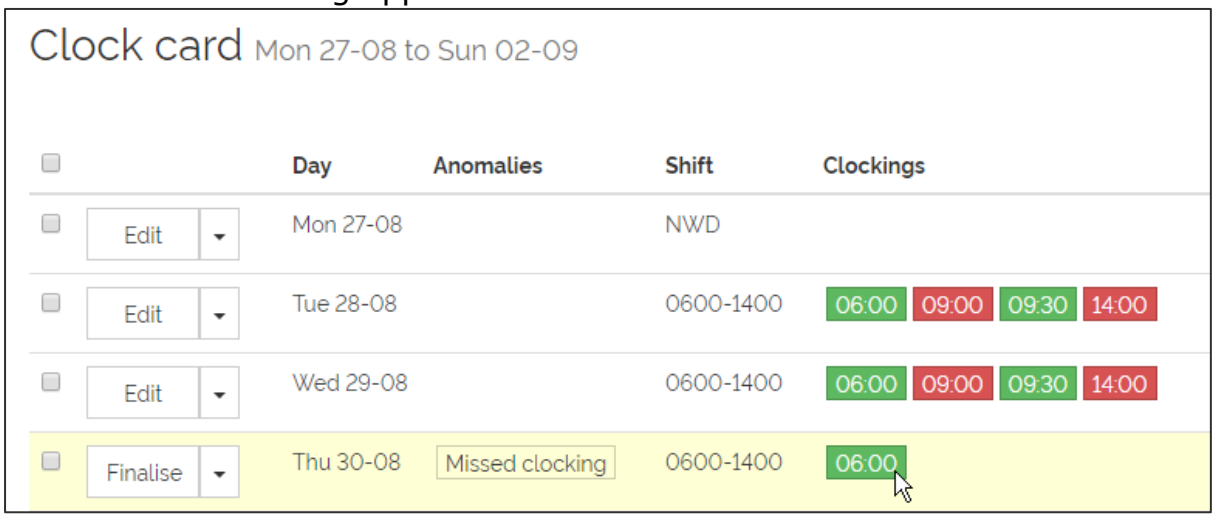
In the below example, the **Employee** started work at 06:00 but forgot to clock in until 06:17. Note that a **missed clocking** anomaly also appears, as subsequent clockings are not yet recorded.
The 06:17 clocking appears in the **clock card**. Select the clocking.



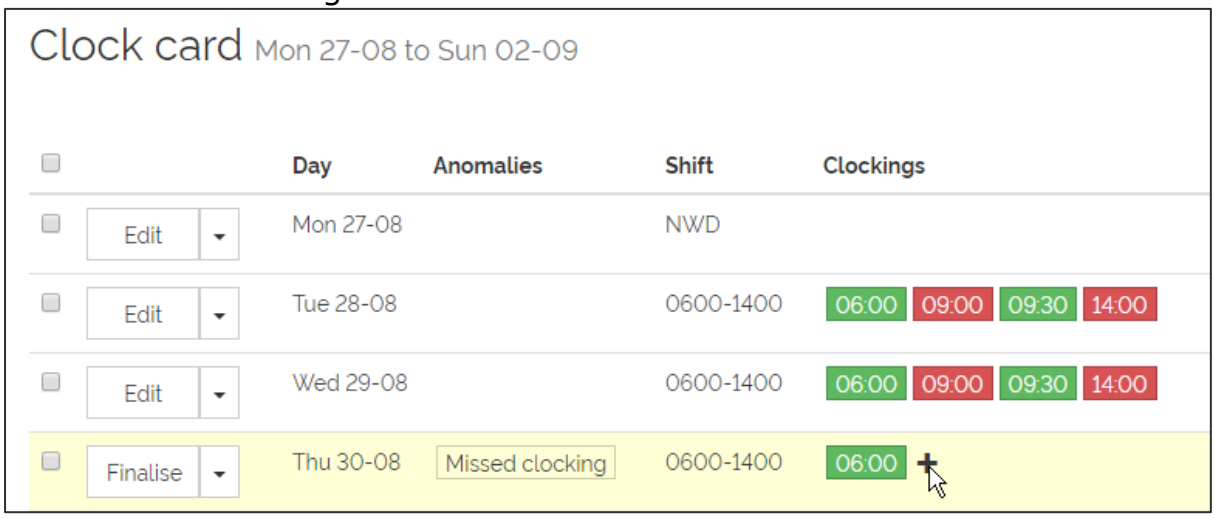
Correct the clocking and select **Submit**.



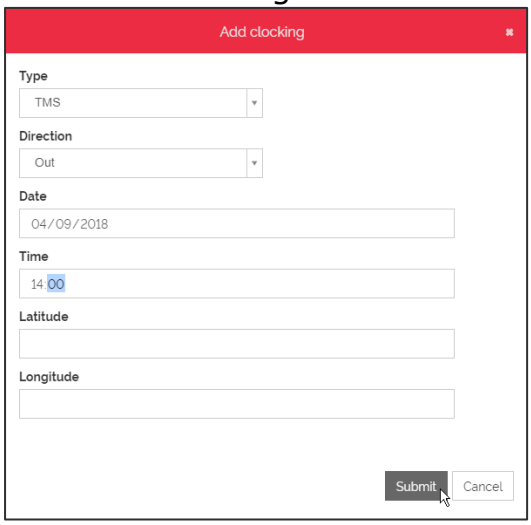
The modified clocking appears in the **clock card**.



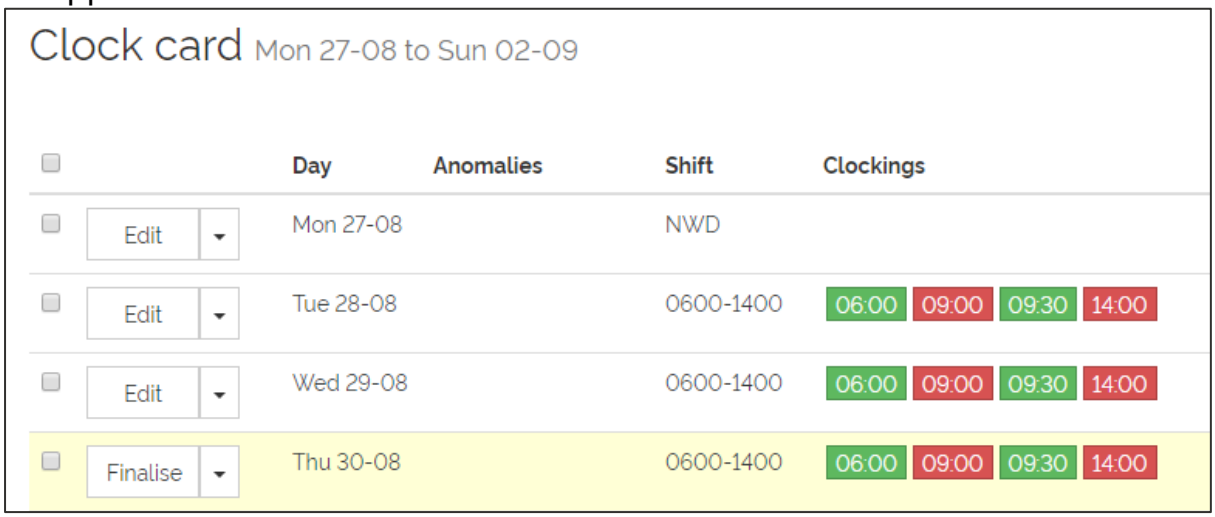
You may also add clockings by moving your cursor over the **Clockings** column and selecting the **+** icon.



Enter the clocking details and select Submit.

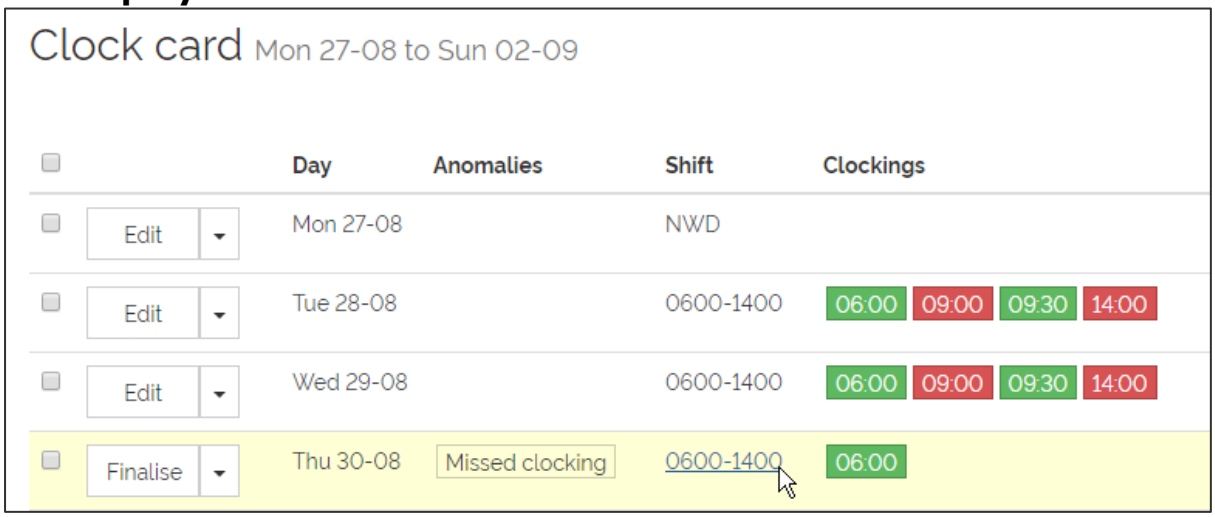


In the below example, all of the **Employee's** clockings for the day are added to the **clock card.** Note that the **missed clocking** anomaly has disappeared.

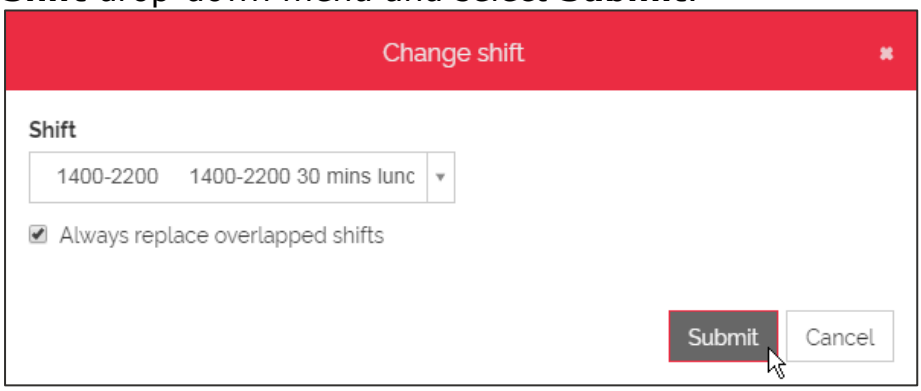


59.1.4 Changing shifts

Shift changing also works the same as before. In the clock card, select the **Employee's** shift name.

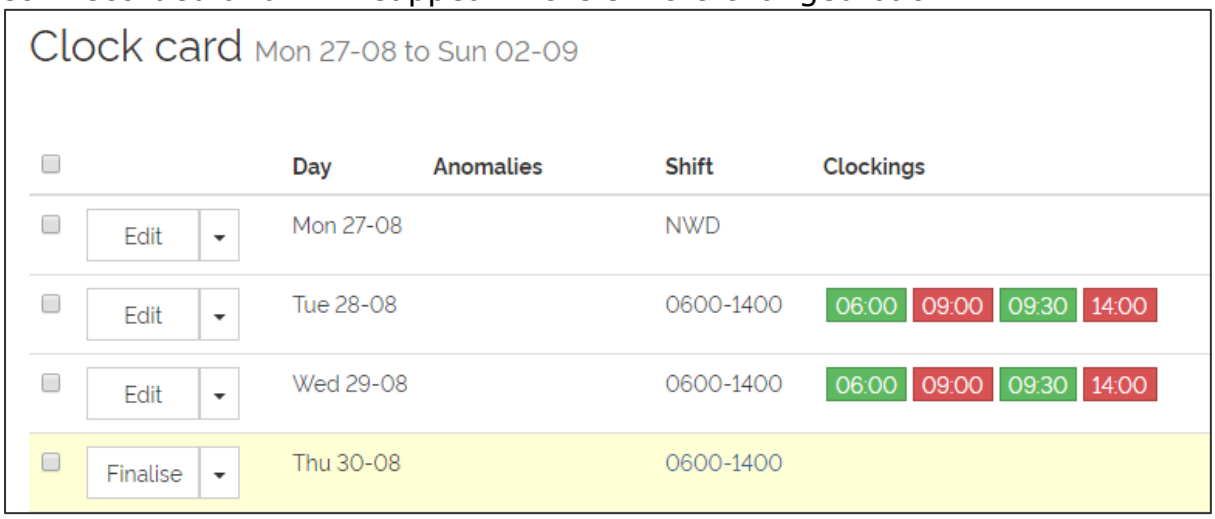


The **Change shift** window appears. Select the desired shift from the **Shift** drop-down menu and select **Submit**.



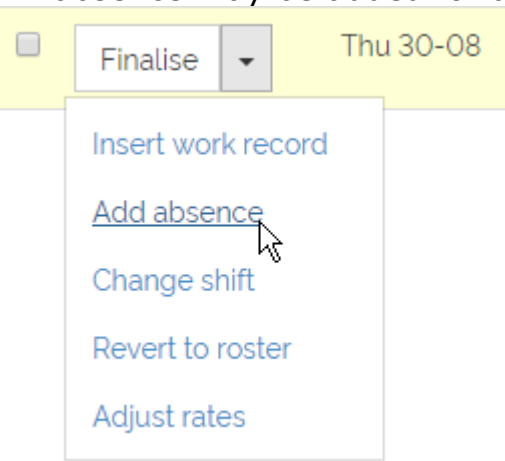
The shift changes. Any existing clockings are refreshed based on the new shift. In this example, the existing clocking at 06:00 disappears as it is

not in the 14:00-22:00 shift clocking range. Note: the 06:00 clocking is still recorded and will reappear if the shift is changed back.



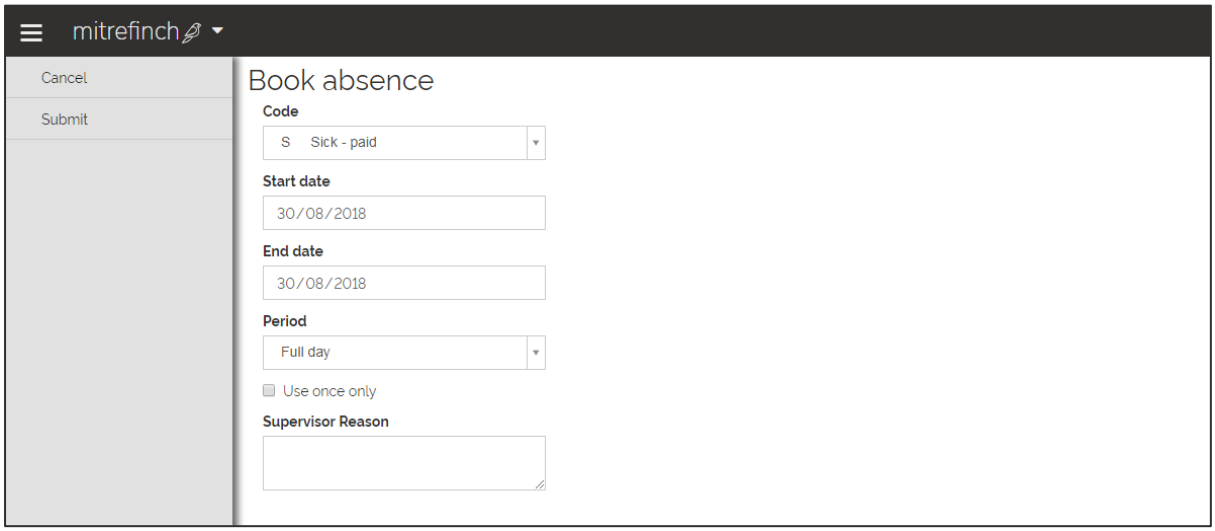
59.1.5 Adding an absence

An absence may be added for a shift while it is in progress.

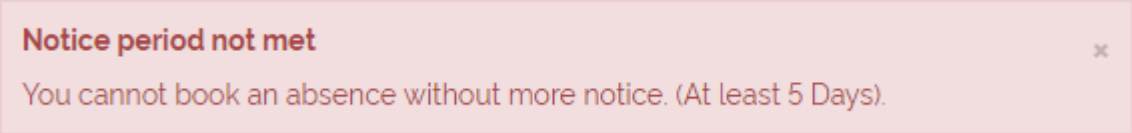


Select the arrow next to the **Finalise** button to open a drop-down menu. Select **Add absence**.

The **Book absence** screen appears. The **Start** and **End Dates** are already filled in with the specified date. Select the **Absence Code**, **Period** and enter a **Supervisor Reason** if required. Select **Submit** to save the absence to the shift.

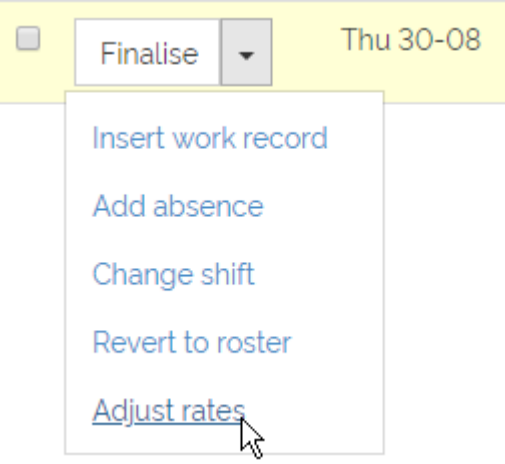


The Employee absence is recorded against the shift in progress.
Note: if notice periods for booking absences are configured, booking absences for shifts in progress will be restricted by these periods.



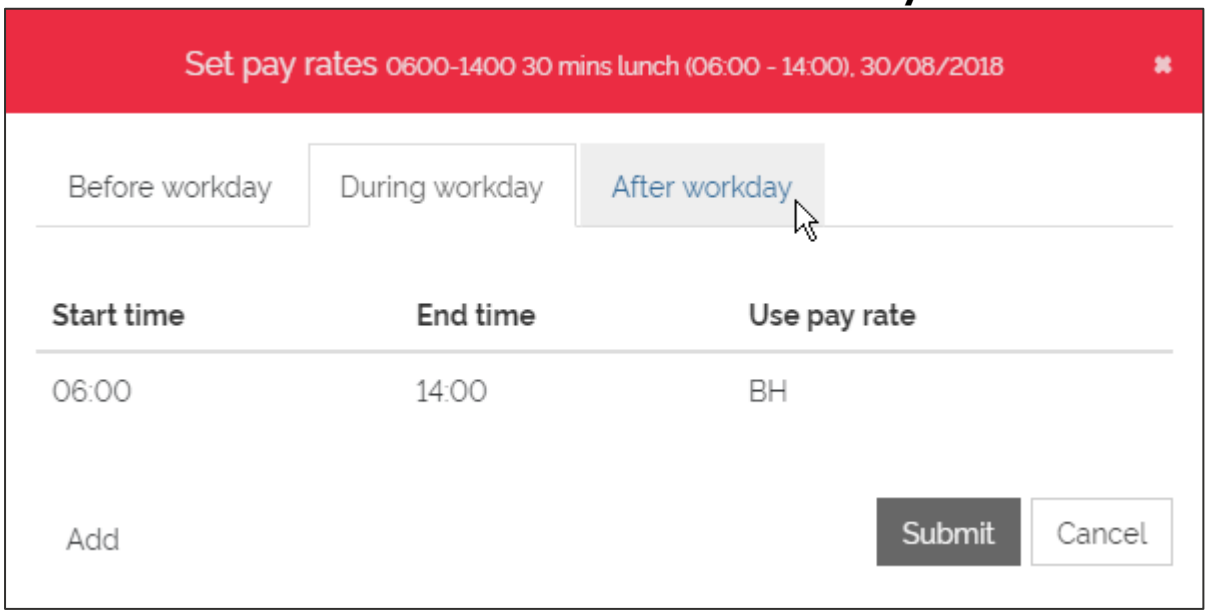
59.1.6 Adjusting shift rates

Shift rates may also be adjusted while the shift is in progress.

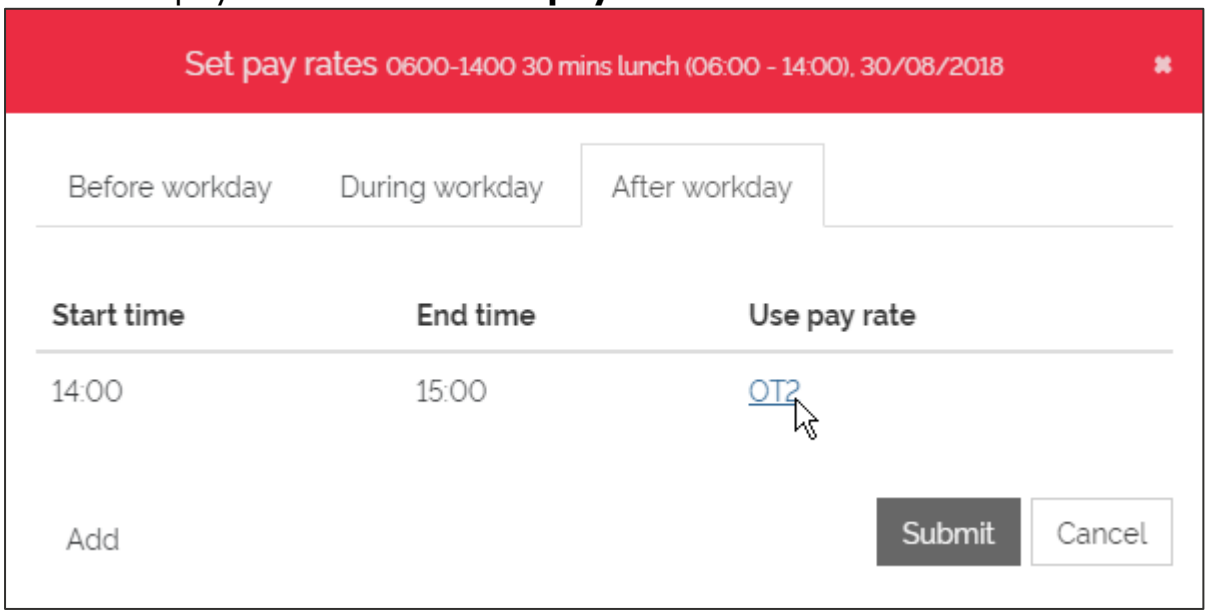


Select the arrow next to the **Finalise** button to open a drop-down menu. Select **Adjust rates**.

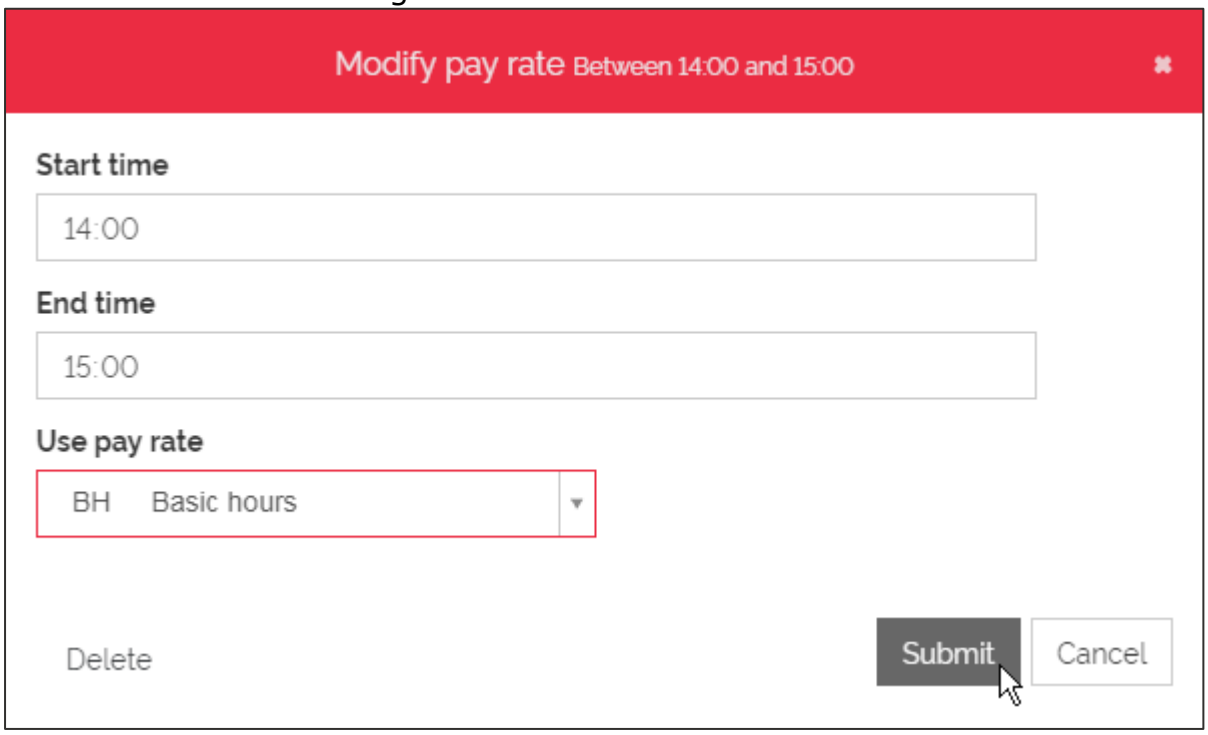
In this example, an **Employee** has agreed to work an hour after their shift on the basic pay rate. The pay rate for this work needs changing from overtime to basic hours. Select the **After workday** tab.



Select the pay rate from the **Use pay rate** column.



Select the **Use pay rate** drop-down menu to select a different pay rate for the shift. In the below example, the pay rate for 14:00-15:00 overtime has been changed to **basic hours**.

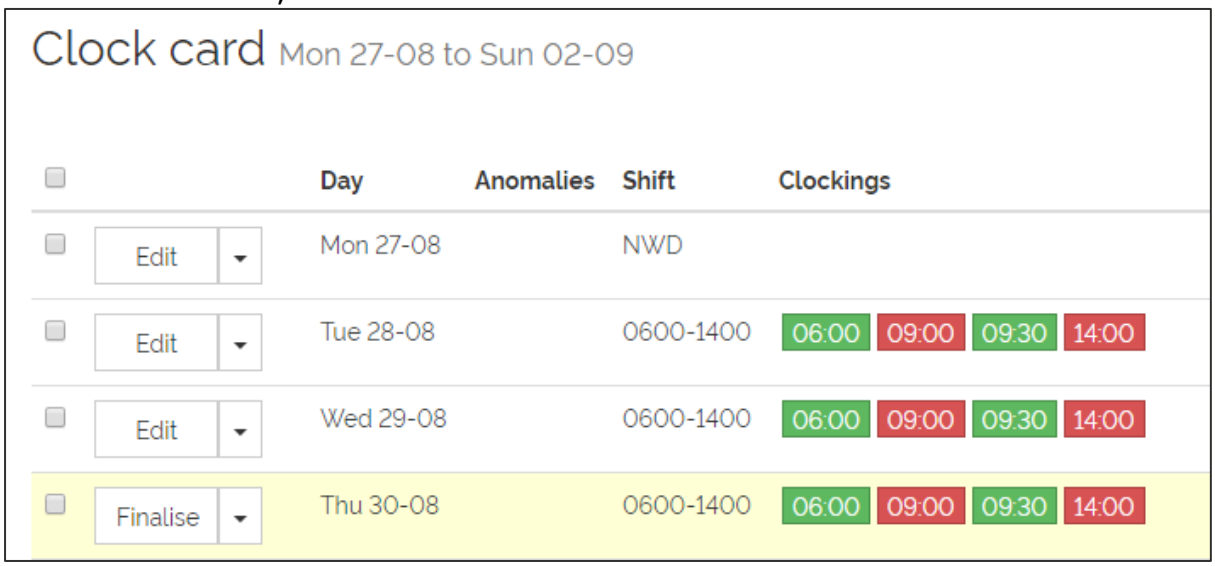


Select **Submit** to save the changes.

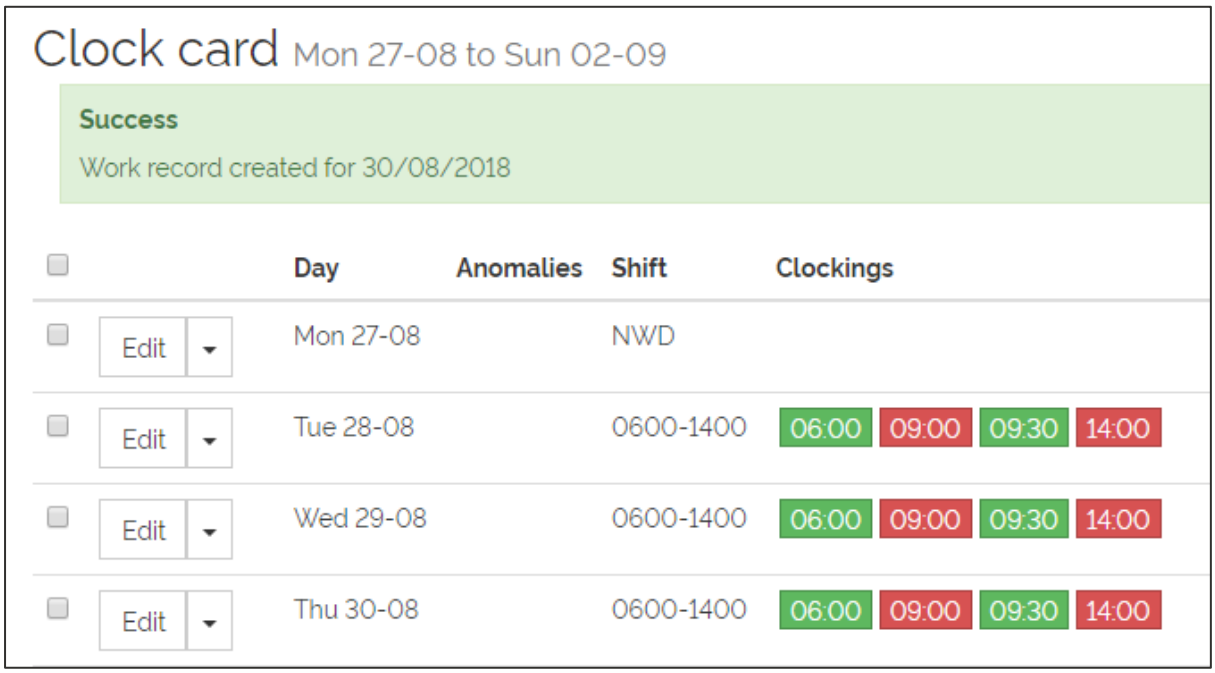
59.1.7 Finalising a shift

Finalising a shift creates a permanent work record for the shift. It is not necessary to finalise a shift unless the work record is needed for reporting or payroll immediately. For example, if you are simply amending or adding a clocking, the shift does not need finalising.
Subsequent **Employees** clockings are still recorded. For example, if a **Supervisor** adds a clocking out for an **Employee** at 14:00, and the **Employee** actually clocks out an hour early, the clock card will record both clockings. The clocking is subject to the shift rules in your TMS configuration, and may be flagged as an anomaly. An **Employee** may also submit a work record request to change a finalised clocking.

To finalise a shift, select the **Finalise** button.



The work record is finalised and appears as a normal work record. The **Supervisor** may edit the work record if necessary by selecting the **Edit** button.



60 Release 8.27.0.1

60.1 Job planner report

Note: This feature requires generating a custom report in **RepGen**, therefore it is advisable that this is set-up by a system administrator familiar with the process.

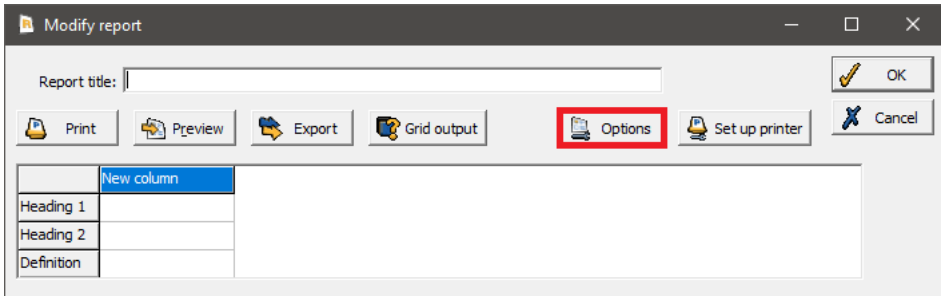
The **Job planner report** allows you to generate a report in **RepGen** that displays an **Employee's** shift times as well as any associated **Jobs** allocated to that shift. This can be useful for producing things such as paper rotas with more information about an **Employee's** shift.

In the example below, you can see a group of employees that have several jobs applied to individual shifts. Under each day, it lists the employee's shifts on the left, the name of the job they will be carrying out, and then the time period for that job on the right. You can generate this for as many days in a week as you would like, and over an indefinite period of time. The report will display this in periods of weeks.

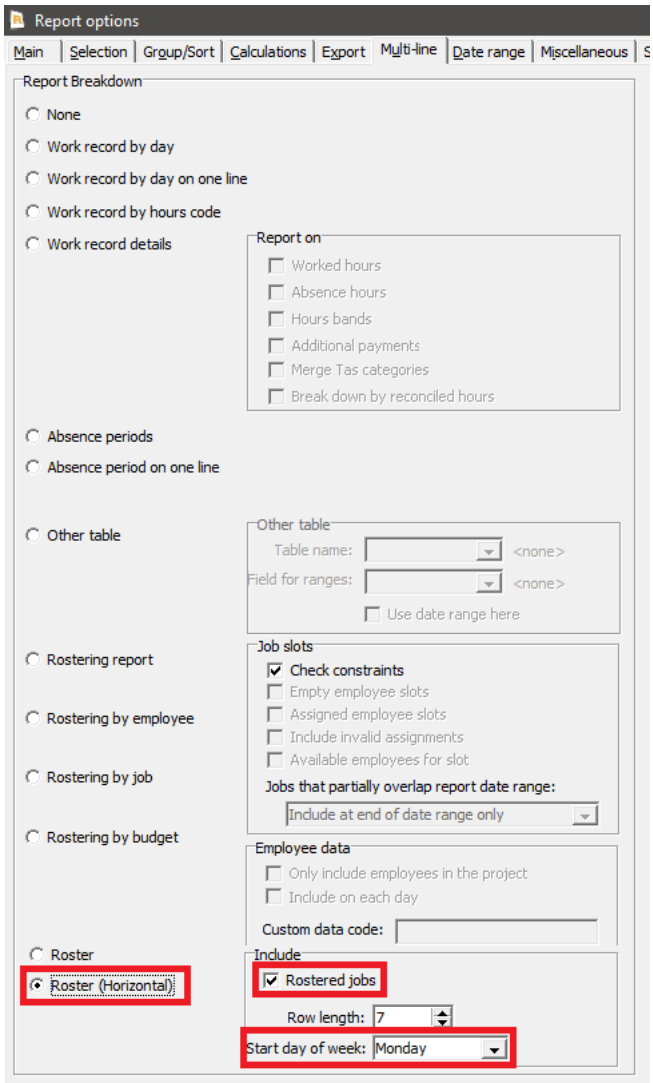
TMS - Unit Test **Page 1**
Rostered job report printed at 14:11 on 15/02/2019

Monday				Tuesday				Wednesday				Thursday				Friday			
Shift	Job	Start	End	Shift	Job	Start	End	Shift	Job	Start	End	Shift	Job	Start	End	Shift	Job	Start	End
EMPNAME: K Barclay																			
Week commencing: 04/02/2019																			
0800-1600	Engineer	8:00	12:00	0200-0800	Porter	2:00	8:00	0800-1600	Gardener	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1530	Engineer	8:00	15:30
0800-1600	Manager	12:00	16:00	1800-2400	Bar tender	18:00	23:30												
				1800-2400	Glass collector	23:30	0:00												
Week commencing: 11/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	16:00	0800-1600	Gardener	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1530	Engineer	8:00	15:30
0800-1600	Manager	12:00	16:00																
EMPNAME: W Robin																			
Week commencing: 04/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	12:00
0800-1600	Manager	12:00	16:00	0800-1600	Manager	12:00	16:00	0800-1600	Manager	12:00	16:00	0800-1600	Manager	12:00	16:00	0800-1600	Manager	12:00	16:00
Week commencing: 11/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	16:00	0800-1600	Gardener	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1530	Engineer	8:00	15:30
0800-1600	Manager	12:00	16:00																
EMPNAME: Q Hundt																			
Week commencing: 04/02/2019																			
0800-1600	Waiter	8:00	12:00	0800-1600	Waiter	8:00	12:00	0800-1600	Waiter	8:00	12:00	0800-1600	Waiter	8:00	12:00	0800-1600	Waiter	8:00	12:00
0800-1600	Bar tender	12:00	15:00	0800-1600	Bar tender	12:00	15:00	0800-1600	Bar tender	12:00	15:00	0800-1600	Bar tender	12:00	15:00	0800-1600	Bar tender	12:00	15:00
0800-1600	Glass collector	15:00	16:00	0800-1600	Glass collector	15:00	16:00	0800-1600	Glass collector	15:00	16:00	0800-1600	Glass collector	15:00	16:00	0800-1600	Glass collector	15:00	16:00
Week commencing: 11/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	16:00	0800-1600	Gardener	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1530	Engineer	8:00	15:30
0800-1600	Manager	12:00	16:00																
EMPNAME: G Arehano																			
Week commencing: 04/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1600	Engineer	8:00	16:00
0800-1600	Manager	12:00	16:00																
Week commencing: 11/02/2019																			
0800-1600	Engineer	8:00	12:00	0800-1600	Engineer	8:00	16:00	0800-1600	Gardener	8:00	16:00	0800-1600	Engineer	8:00	16:00	0800-1530	Engineer	8:00	15:30
0800-1600	Manager	12:00	16:00																

To begin, you will need to open **RepGen**, either through **WinTMS** or the .exe on your system. Then, you will select **Add** to create a new report, give it a name, and then you should choose **Employee** as the main source of data. This will open the **Modify report** window. Select **Options** from this window:



You will then need to navigate to the **Multi-line** tab (keyboard shortcut alt+U) to choose what type of report this will be – in this instance, **Roster (Horizontal)**. Make sure the **Rostered jobs** checkbox is ticked and that you have chosen your week starting day. Then click **OK**.



Note: There is a known issue involving the **Report options** menu. It may be too large for some screen sizes (like laptops) and you will be unable to navigate down far enough to the **Roster** options. Using a larger screen such as a monitor will serve as a workaround.

You will then need to construct a table in the **Modify report** window that instructs what data **RepGen** puts into the boxes. You may make a custom one, but in these notes we have included an example which will generate

a report similar to the one above. To add extra columns, right click inside the table.

Using the table below, you can create the report. This will need to be repeated for each day that you want included on the report.

Column 1	Column 2	Column 3	Column 4	Column 5
Monday				|
Shift	Job	Start	End	|
WSREF[1]	ANYDESC[WSJOBCODE['<insert TAS category here>', 1], ROSJOBDEF]	WSJOBSTART[1]	WSJOBEND[1]	'|'

Under column 2, you will need to enter the TAS category that you use to define your jobs where "<insert TAS category here>" is written in this example.

The codes in the fourth row do the following things:

- **WSREF:** This will extract the details of the rostered shift.
- **WSJOBCODE:** This will extract the details of the rostered job.
- **WSJOBSTART:** This will extract the details of the start time of the job.
- **WSJOBEND:** This will extract the details of the end time of the job.

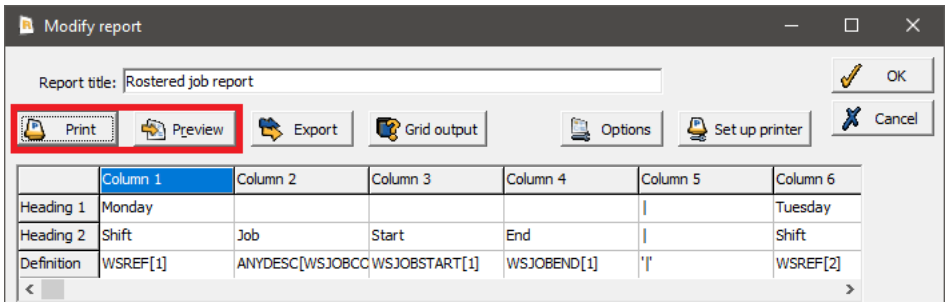
In order to add extra days, simply copy columns 1-5, changing the 'Monday' to 'Tuesday' and so on. You will also need to change the numbers in square brackets ([1]) to the next number. So for Tuesday, the table would look like this:

Column 1	Column 2	Column 3	Column 4	Column 5
Tuesday				|
Shift	Job	Start	End	|
WSREF[2]	ANYDESC[WSJOBCODE['<insert TAS category here>', 2], ROSJOBDEF]	WSJOBSTART[2]	WSJOBEND[2]	'|'

Within **RepGen**, you should be left with a screen looking like this (that continues on to show every day of the week you want to include on the report):

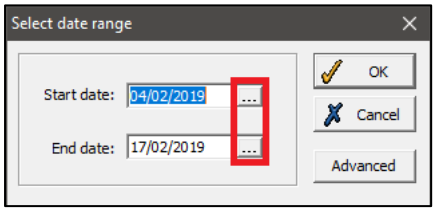
	Column 1	Column 2	Column 3	Column 4	Column 5
Heading 1	Monday				|
Heading 2	Shift	Job	Start	End	|
Definition	WSREF[1]	ANYDESC[WSJOBCC	WSJOBSTART[1]	WSJOBEND[1]	'|'

Once the report is created, you can double click on it within **RepGen** and the click **Preview** or **Print** on the window that opens.

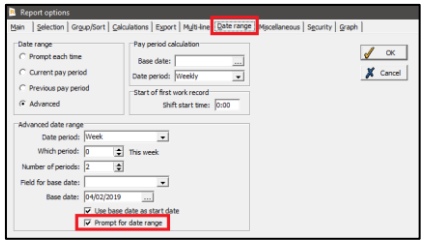


These options will prompt you to **select a range** of **Employees** to report on. You can choose a **Single** employee, **All** employees, a **Range** of employees or **Extended** employees.

You will then be asked to **select date range** for this report. Simply click the '**...**' button on the **Start date** and **End date** options to choose this range.



Note: Depending on your **RepGen** settings, you may not be asked to choose a **date range**. To change this, **Modify** your created report, open the **Options** menu and navigate to the **Date range** tab (alt+D). Under **Advanced date range**, select the **Prompt for date range** box.



61 Release 8.27.3.0

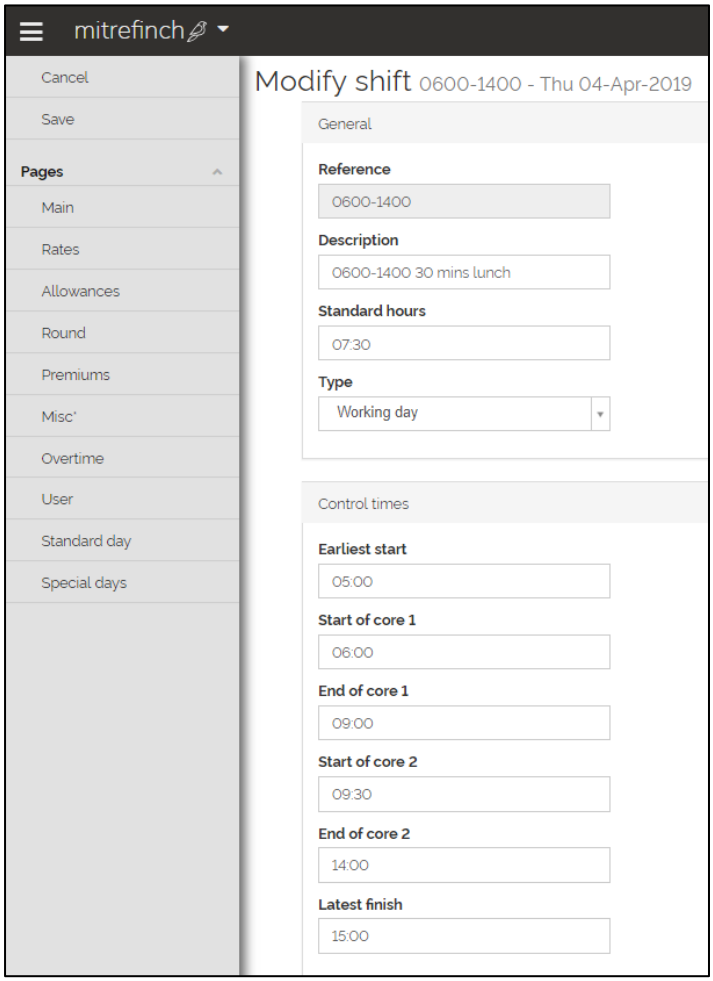
61.1 Changes to Modify shift

Clicking **Modify shift** functionality has been changed when making changes to a shift as a **Supervisor**. The previous menu has been removed from the **Group** and **Employee planners**, and **Modify shift** now directs to the **Shift maintenance** screen. A new **Modify shift** action has been added to work record maintenance screens like the **Clock card** or **Anomalies** pages. This directs to the **Shift maintenance** screen, like from the **Group** and **Employee planners**.

- **Group planner**
- **Employee planner**
- **Anomalies**
- **Clock Card**

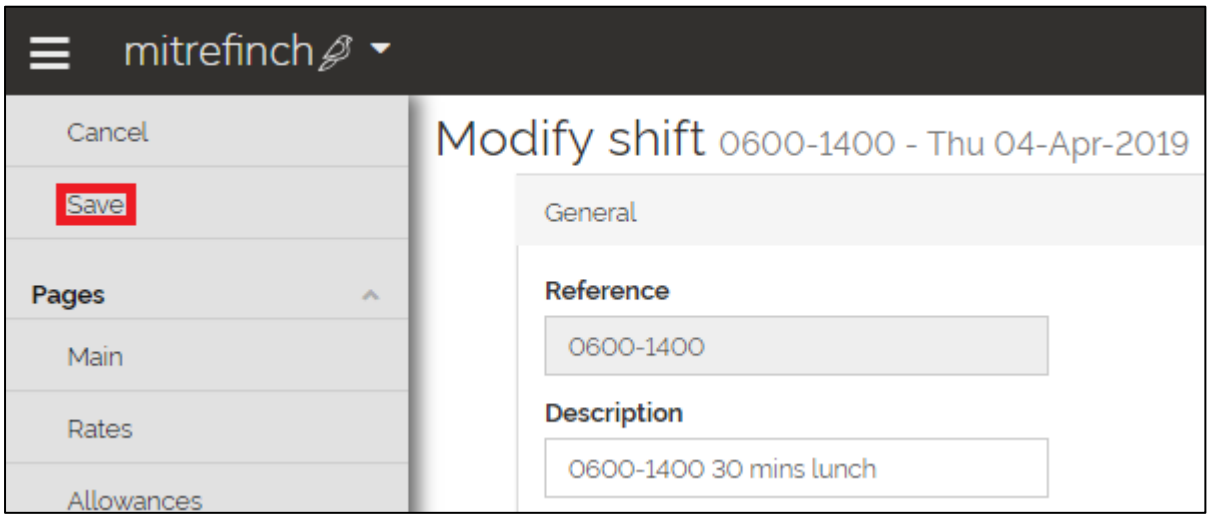
TMS will recognise where **Shift maintenance** has been accessed from, either from a **Modify shift** button or the **Shift maintenance** widget or **Header pane** item. When accessed from a **Modify shift** button, **TMS** will only modify a single instance of the shift and create a personalised shift, rather than changing every instance of the shift.

This change has been implemented to allow greater control over shifts, and accommodate ad hoc shift changes. As a result, several more aspects of a shift can be changed than before. For example, you can modify the earliest start and latest finish times of the shift, as well as modifying things like the core hours.

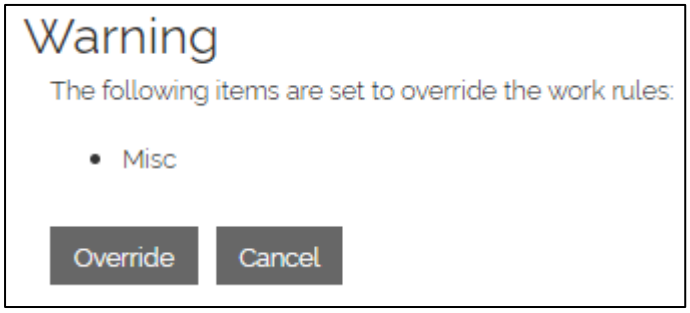


You may not change the reference of the shift, which will remain the same as the original shift that you are modifying. Everything else, however, is editable. You can also navigate to other **Pages** to edit various other aspects of the shift that do not appear on the **Main** page, such as **Premiums**, **Round** and **Rates**. These can be accessed by clicking the desired **Page** in the navigation bar on the left-hand side of the screen.

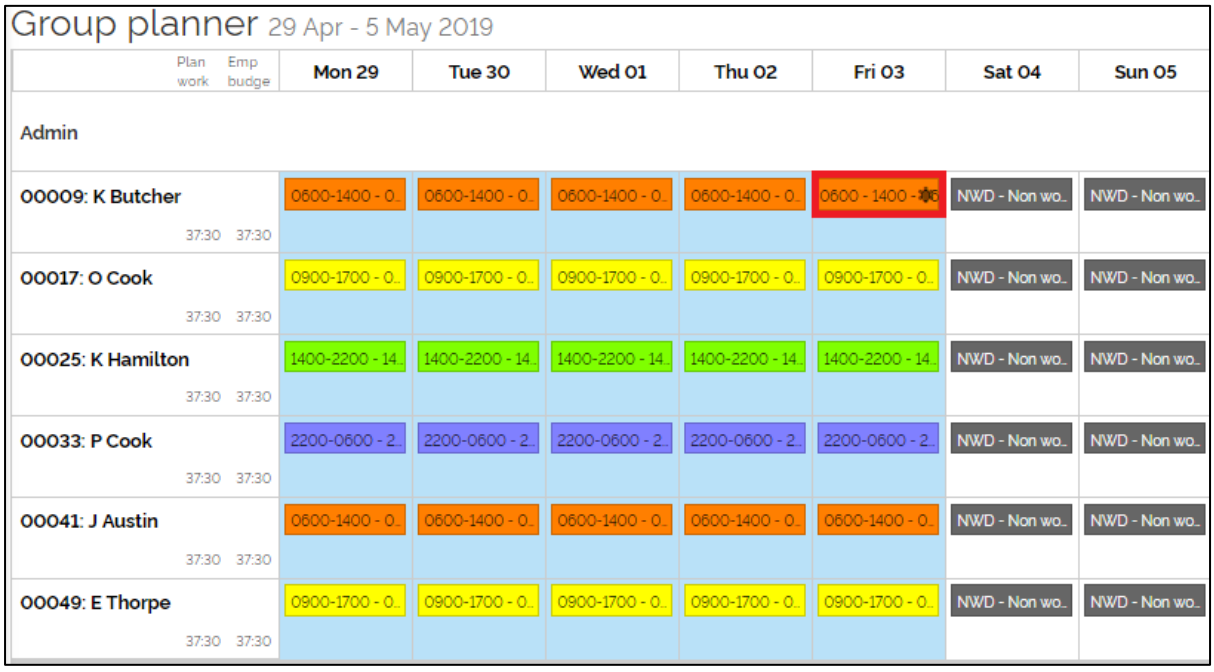
Once the required changes have been made, click **Save** in the navigation pane to confirm the changes. **TMS** will then create a personalised shift for the employee, and will not change the shift definition as a whole.



TMS will warn you if your changes do not comply with your standard work rules. A confirmation page will show, informing you what items violate the rules and give you the option to **Override** or **Cancel** the change. Click **Override** to confirm your changes.



The shift will then appear as normal in the usual places. It will display as a Personalised shift, with an asterisk (*) in the box to signify that it is a Personalised shift. As you can see in the example below, the **Supervisor** has modified K Butcher's Friday 3rd shift and it now displays the asterisk to give a quick reference to which shifts have been changed.



62 Release 8.27.6.0

62.1 New widgets

Two new **Widgets** have been added, which are available to add to an **Employee's Dashboard** via the **Dashboard maintenance** screen. The following two **Widgets** have been added:

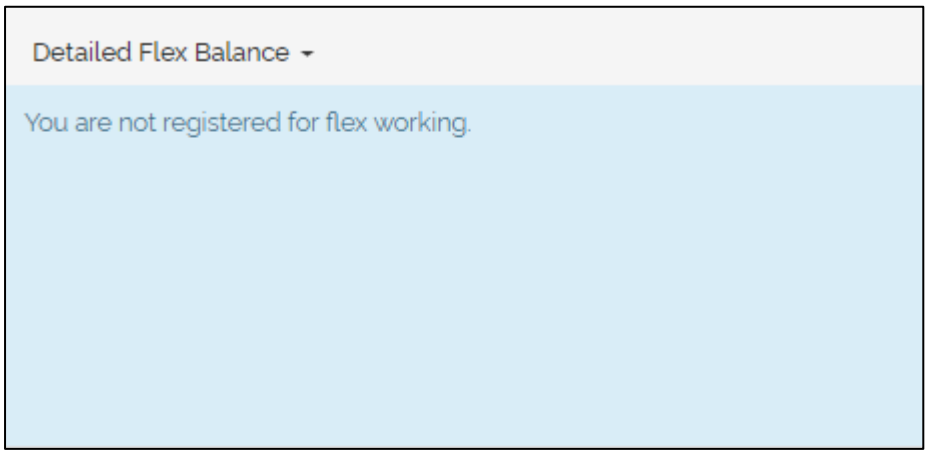
- **Detailed Flex Balance Widget**
  - This **Widget** shows the information that you normally get when clicking on the **Flex balance Widget**.
- **Clockings/Flex Summary Widget**
  - This **Widget** combines the information that you get from the **Detailed Flex Balance Widget** as well as the **Recent Clockings Widget** into one. You can also **Clock in** and **Clock out** using this **Widget**.

62.1.1 Detailed Flex Balance Widget

The **Detailed Flex Balance Widget** looks like the following on the **Employee Dashboard**:

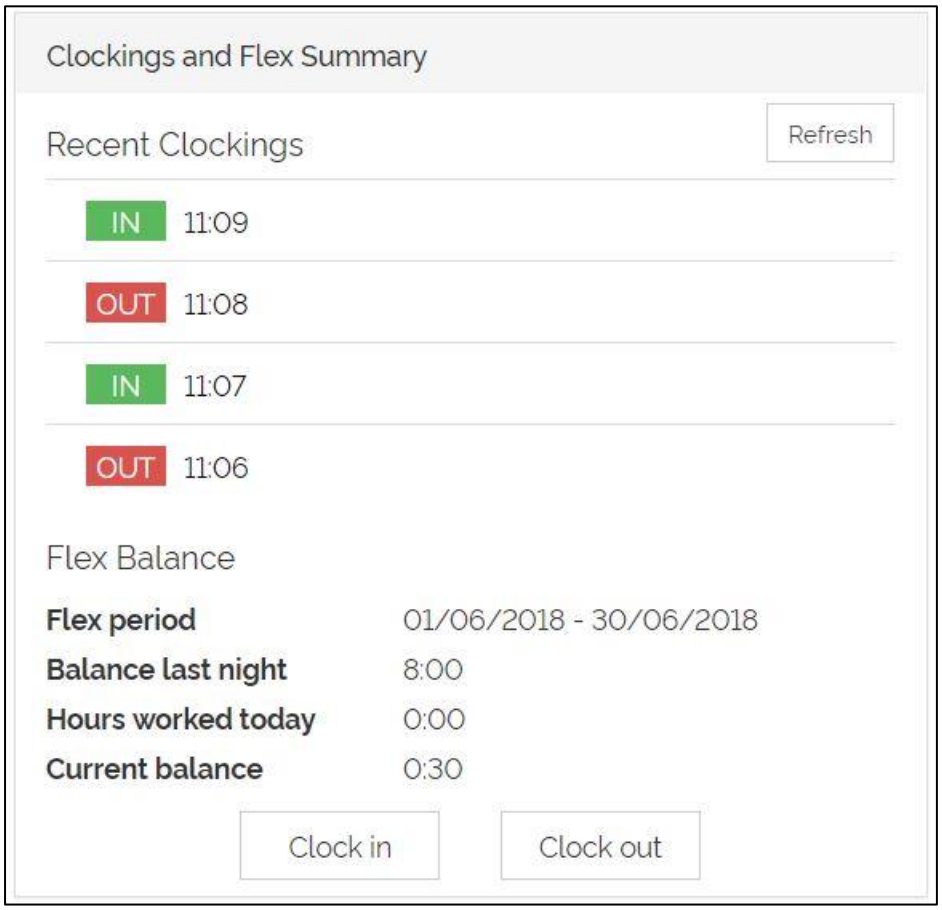
The information displayed in this **Widget** is the same information that is normally displayed when clicking into the **Flex balance Widget**, however it will not show **Provisional flex**.

Note: If the **Employee** is not registered for **Flex working**, the **Widget** will inform the **Employee** of this:

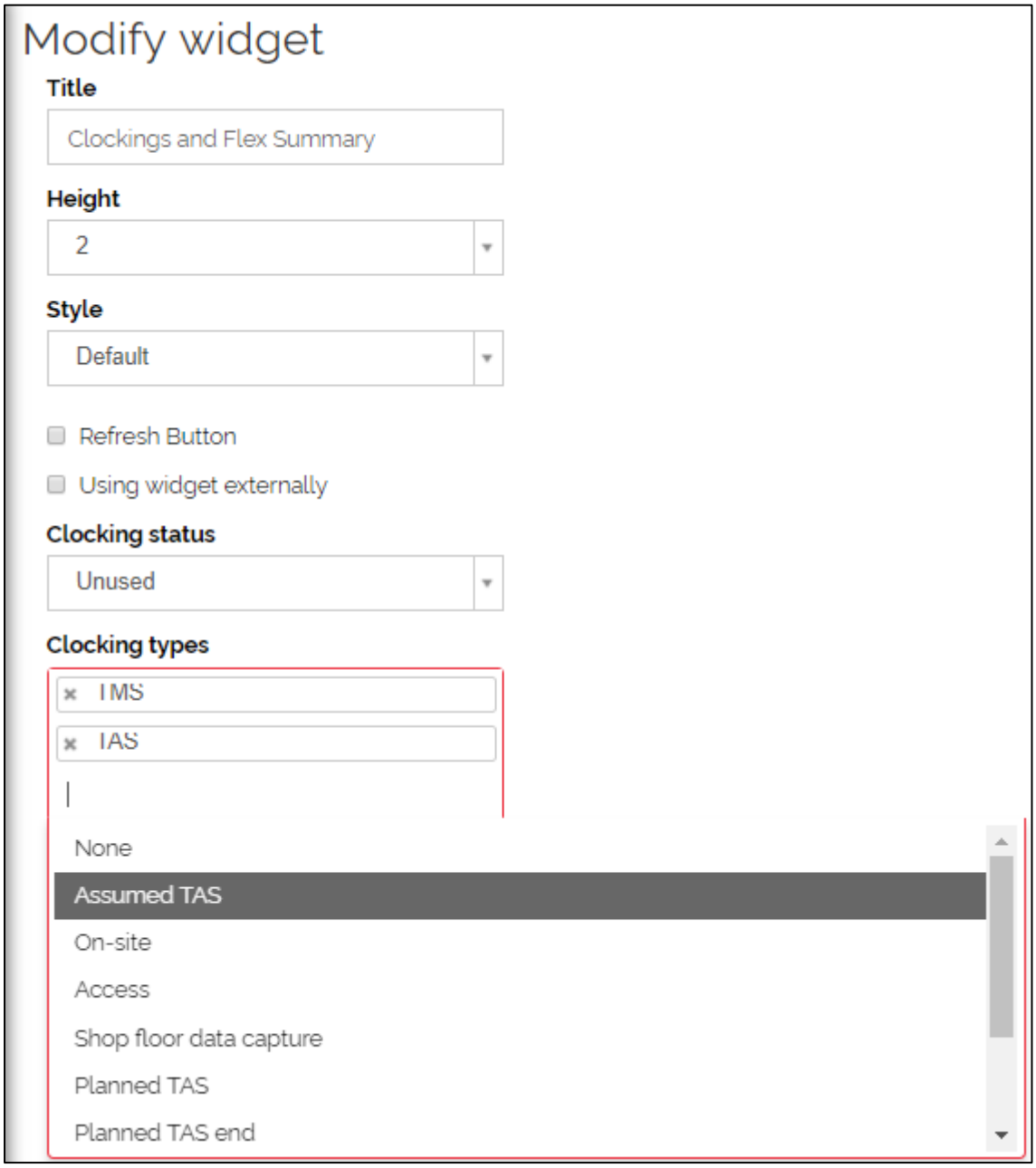


62.1.2 Clocking/Flex Summary Widget

The **Clocking/Flex Summary Widget** combines the information in the **Detailed Flex Balance Widget** with the **Clocking Widget** – allowing an **Employee** to **Clock in** and **Clock out** from a **Widget** that also shows a detailed breakdown of their **Flex balance**. It looks like the following:



There are several options for this **Widget** that can be changed in the **Modify widget** menu accessed from the **Dashboard maintenance** screen:



You can find details on the **Refresh button** option in section 62.2.

You can find details on the **Using widget externally** option in section 62.3.

The **Clocking status** option allows you to customise what **Clockings** your **Employee** sees on this widget. There are three options:

- Unused – this will display clockings that have not been processed and are therefore not associated with a **Work record**.
- Current – this will display all clockings in the current processing period (which is displayed in the **Widget)**.
- All – this will display all clockings that you have made, including those that have already been processed

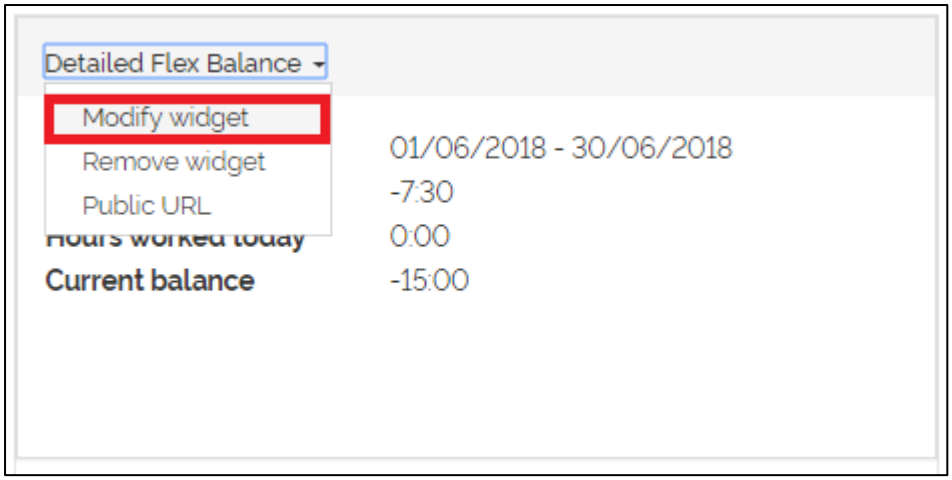
The **Clocking types** option allows you to use a drop-down menu to choose what types of clocking appear in the **Widget**. This includes things like **TMS clockings**, **TAS clockings** and **Planned TAS.** Select your desired types from the drop-down menu to add them, and click on the '**X'** to remove them from the list. If no **Clocking types** are set, then no clockings will be displayed.

Note: Remember to click **Submit** to save your changes.

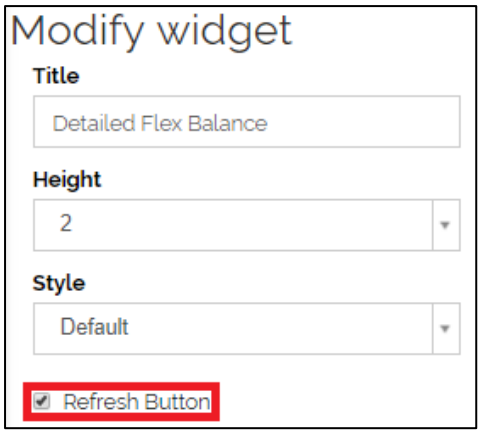
62.2 Widget Refresh button

These two **Widgets** also come with the option of refreshing the information within them without refreshing the entire webpage. By default, the **Refresh button** does not appear on the **Widgets**.

To add them, navigate to the **Dashboard maintenance** screen, add one of the new **Widgets** to the **Dashboard**, and then click the drop-down menu button next to the **Widget's** name and select **Modify widget**:



There is a new check box on this screen, labelled **Refresh button**. Tick it to display the refresh button on the new **Widget:**



Click **Submit** in the left-hand panel to save your changes.

The **Widget** will now display the **Refresh button** on the **Employee dashboard** – clicking this button will update any information the widget shows:

62.3 Using Widgets externally

The **Clocking/Flex Summary Widget** can be used externally to allow your **Employees** to **Clock in** and **Clock out** without accessing **TMS 8** itself. You could place the **Widget** in places such as your intranet, so your **Employee** can clock in easily from their browser's homepage.

Before this is done, an **Employee** must be using **Windows authentication** so they do not need to log in to **TMS 8**, and the log in process is done automatically.

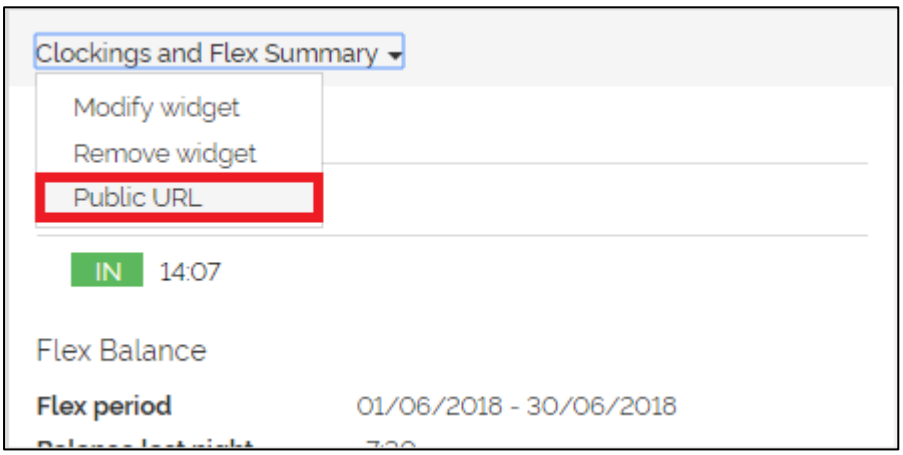
Secondly, your system administrator will need to alter some security settings in the **web.config** file located in your **TMS** installation folder. Your intranet URL will need to be added to the file. In the following example, the intranet URL is "http://localhost/WidgetTest":

```
<add key="SanitiseParameters" value="True" />
<!-- #33644 Content-Security-Policy header value used to provide protection in HTML5 against XXS -->
<add key="CspHeaderValue" value="default-src 'self', 'http://localhost/WidgetTest/'; object-src 'self'; style-src 'self' 'unsafe-
<!-- Custom external/mobile profiles
```

The link will need to be added to the text beneath the **"#33644 Content-Security-Policy**" line. Add the URL after "**'default-src 'self',**", using the formatting displayed in the example above.

Finally, the **Using widget externally** check box needs to be ticked in the **Modify widget** menu in **Dashboard maintenance**. If this is unticked, pressing any of the buttons on the **Widget** will cause the entire dashboard to be displayed, rather than just the **Widget**.

The public URL for the **Widget** can be found by clicking on **Public URL** on the drop-down menu on the **Clocking/Flex Summary Widget** in the **Dashboard maintenance** screen:



63 Release 8.28.0.0

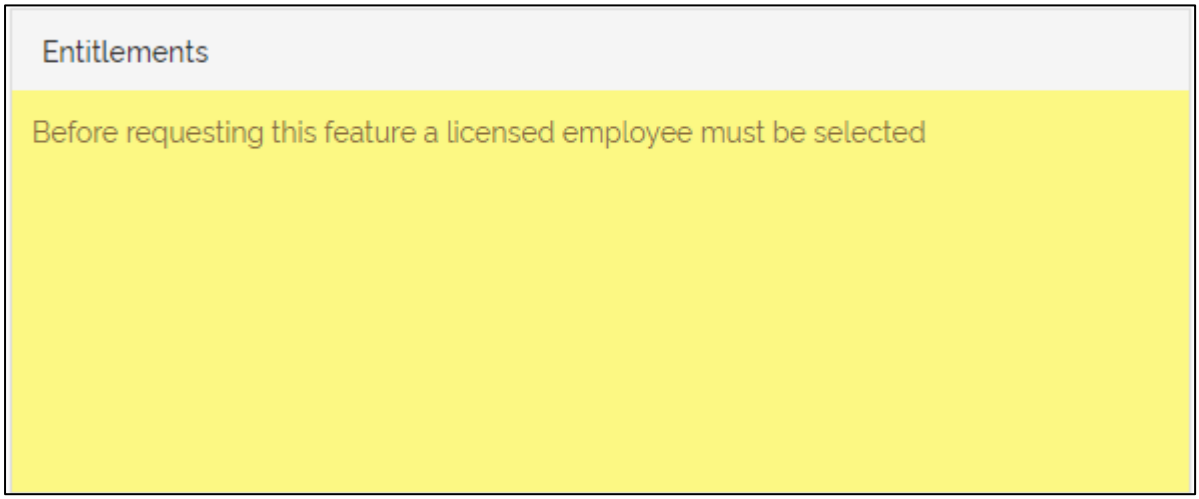
63.1 Security changes for Employee selection

Through certain actions, Supervisors may find themselves with an Employee selected that they do not have security rights to view. This can be achieved in a few ways:

- Selecting an employee in the **Group planner** which is working 'away' from their normal **Department**
- Creating a new employee for a **Department** the Supervisor does not have access to

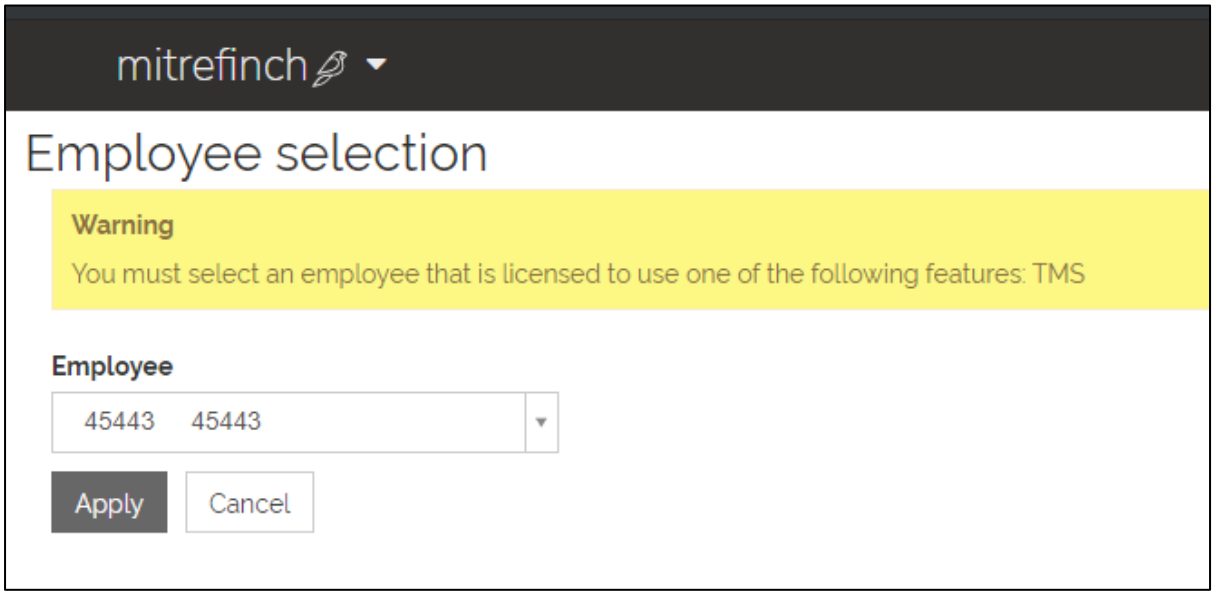
When this occurs, the Supervisor will have **Employee <undefined>** in their **Employee selection** on the **Supervisor toolbar**. To avoid the Supervisor accessing sensitive information that they do not have security clearance to view, **TMS 8** will always validate the security permissions of the Supervisor, and only display sensitive information if the Supervisor is allowed to view the Employee they have selected.

If a Supervisor has selected an Employee they do not have access to, their **Dashboard** will display messages in place of sensitive information. They look like the following:



To remove these messages, all the Supervisor needs to do is select a valid employee using the **Employee select** on the **Supervisor toolbar**.

Similarly, when a Supervisor adds a new Employee to a **Department** they cannot see, they will not be directed to that Employee's **Employee details** as they normally would. Instead, they will be shown this screen:



Once an Employee is in a **Department** outside of a Supervisor's security group, then the Supervisor should no longer be able to interact with that Employee. Likewise, if they are adding an Employee to a **Department** that they do have access to, then they won't see this message.

Simply select a new Employee, or click **Cancel** to return to the **Supervisor dashboard**.

Note: If the Supervisor has mistakenly added the Employee to a department outside their security group, the Supervisor will then need to seek help from another appropriate Supervisor with access to that security group. That Supervisor will then need to move the Employee to the correct **Department**.

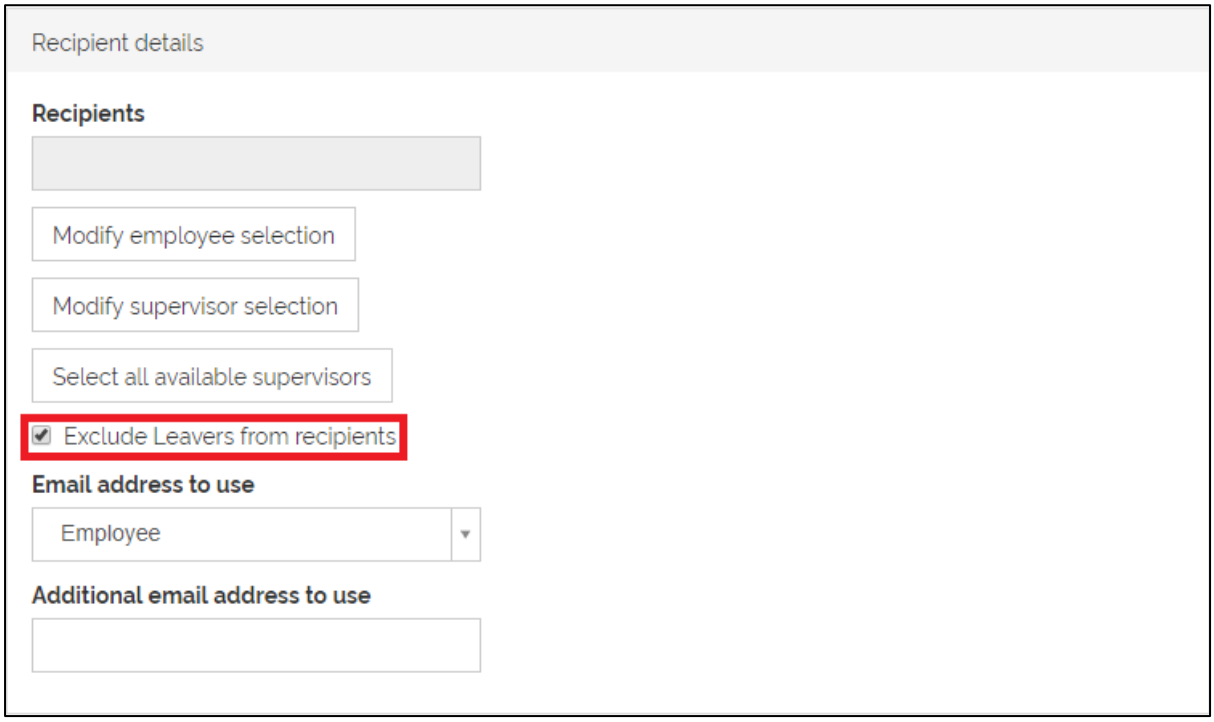
64 Release 8.29.0.0

64.1 Scheduled messages sent to all supervisors/employees can now exclude leavers

Changes to the functionality of **Scheduled messages** have been made that allow **Messages** to exclude Employees or Supervisors that have been marked as leavers. This would mean that any **Scheduled messages** will be sent to the usual list of contacts and recipients, but any leavers will not have an email sent to them. This helps to ensure that Employees and Supervisors who used a personal email no longer receive messages from the company after they leave.

This setting can be found on the **Create message** page, which is accessed through the **Scheduled messages** feature. This can be used for a **one-time message** or a reoccurring message.

Under the **Recipient details** section, a new checkbox has been added:



When ticked, this message will not be sent to leavers.