TMS Reference Guide: Getting Started

Open TMS
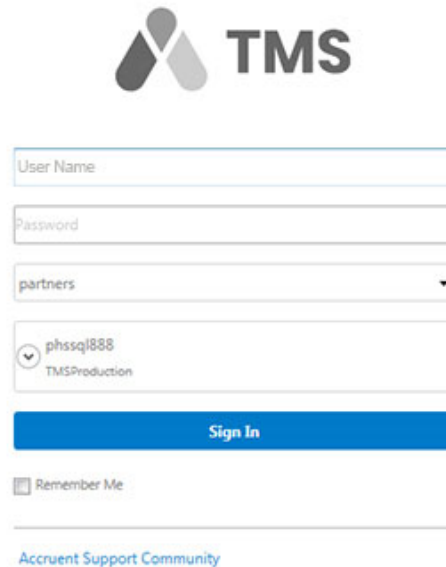
You can open TMS by going to Partners Applications and selecting "TMS Onsite" from the list. Alternatively, you can type http://biomed.partners.org/tms in your browser.

NOTE: TMS is designed to run in Internet Explorer and may experience problems if opened in a different browser.

Log Into TMS

When you open the TMS application, the TMS **Login** screen is displayed.

1. Enter your TMS **User Name.** (This is your Partners user name.)

2. Enter your TMS login **Password**. (This is your Partners password.)

3. Make sure the **Domain** listed is Partners. If not, select Partners from the drop-down menu.

4. Check the Remember Me box.

5. Click the Sign In button.

NOTE: The **Server** and **Database** should already be filled in and the database selected should be "TMS Production".

The User Interface

Menu Bar

The menu bar displays menus for performing various tasks in TMS. Menus are organized by modules - **Work Orders, Assets**, **Schedules**, **Reporting**, **Modules**, **Tools**, and **Setup**. Each module contains the same structure for the sub-menus, such as commands for creating, editing, and querying, making the application easier to learn and use. The options that are available are dependent upon permission levels, so users may not see all options for all modules.
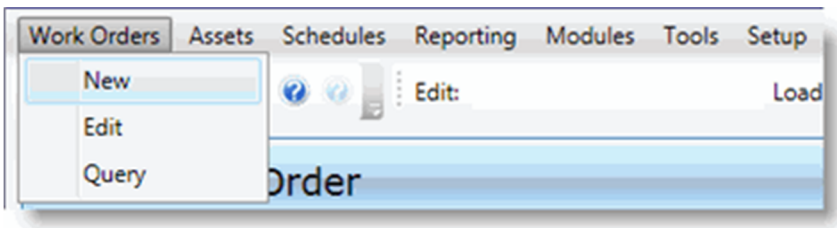
Tool Bar

Tool bar icons allow you to access frequently used functions without having to go through the menu. The icons that are grayed out are unavailable at this time.
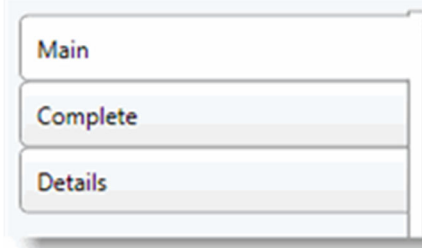
Tool Tips

If you hover your mouse over a tool bar button, TMS displays the button's title, so you always know what the buttons do.

Tabs

TMS was designed with a tabbed interface. The tabbed interface organizes modules and lets you move through the application quickly. In the screen shot below, the **Main** tab of the **Work Order New** screen is forward.

Main

Complete

Details

Buttons

	The **New** button looks like a blank piece of paper and displays a new screen, depending on where you are in the application.
	Save validates fields and saves records or updates made to an existing record.
	Query displays the query form where you can enter defining criteria to limit search results.
	Open Query allows you to choose a saved query.
	Click the **Delete** button to remove an item.
	Quick Print allows you to print a series of records or a single record.
	Reload Original Values reverses all changes you made at once. This button also clears advanced query criteria.
	Undo reverses your last action.
	Redo reverses the **Undo** action, after you click **Undo** .

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	Execute runs the query based upon your selection criteria.
	Reporting opens the **Report Viewer**.
	Duplicate allows you to copy assets, work orders, etc.
	First takes you to the first record in a set of query results.
	Previous takes you to the record that is prior to the current record you have selected in a set of query results.
	Next takes you to the record that is after the current record you have selected in a set of query results.
	Last takes you to the last record in a set of query results.
	Document Upload allows you to attach and view documents on a record. The icon changes when a document is attached to the record or to a related item on the record (i.e. procedure, asset, vendor, etc.). **Note:** If there are inactive documents associated with the record, the icon will still change, but the documents might not be visible in the Document Upload Manager, depending on which view you've chosen.
	Custom Help launches the **Custom Help Viewer**. See the Use Custom Help section below.
	Help displays the HTML help topics for TMS.
	Advanced Query displays an additional query window where you have the ability to enter additional query conditions.
	Lookup displays additional query screens.
	Click the drop-down menu arrow for a list of validated data for a specific field.
Is Default	Click **Is Default** next to the **Form** toolbar drop-down menu to make a standard or custom form your default form.
	The **Home** button takes you back to the screen set as your **Start Up Module**. See the User Preferences topic.
Favorites	The **Favorites** button and the gold star that sits to the right of it are related to your **User Favorites**. See the User Favorites topic.

	The **Copy Item Link** button allows you to copy a direct link to the record currently open to your clipboard. You can then paste this link into an email or other medium.
	The **External Links** button opens links to outside applications. See the External Links section below for more information.

Custom Help

The **Custom Help** button shown in the table above allows you to open the **Custom Help Viewer**. This displays the field-level help that comes with TMS, and also any customized help content that your TMS system administrator has set up in the system.

Forms

TMS includes customizable **Forms** that are available via a drop-down menu and provide different ways of looking at the same records. The Forms that are available in the drop-down menu vary depending upon the user group permissions.
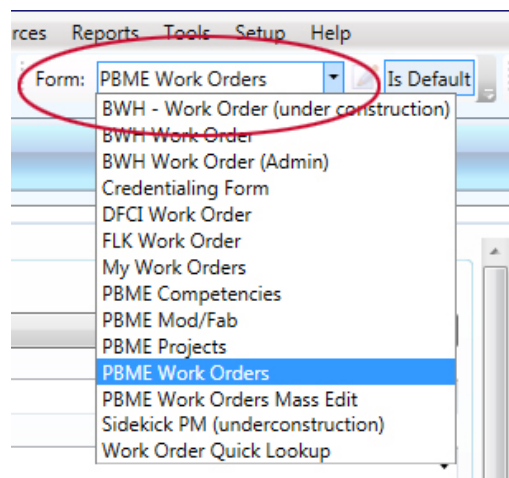
Additional Interface Notes

Save Changes Prompts

Any time you make changes to a record, if you forget to save your changes before navigating away from the module, you will see a prompt that will ask if you want to save your changes. This ensures you don't lose changes.

Spell Check in Text Fields

Multi-line text fields in TMS OnLine/OnSite include a spell check feature that will underline words that appear to be spelled incorrectly. If you click the underlined word, you will be able to choose from a list of suggested spellings. Words that are not listed in the spell checker's dictionary, but you know to be correct, can just be ignored.

Examples of fields where you will see the spell checker feature employed are Completion Comments, Requester Comments and Time Charge Comments.