Time Matters®

Outlook Link Setup and Maintenance

Time Matters has a link to Outlook. After sending an email, users choose to be prompted to "Save to Time Matters". Also, users can choose to "TM Connect" email which has been received.

Following are the procedures to be followed in setting up the Outlook link, and in troubleshooting when it doesn't work:

PART 1: SETTING UP OUTLOOK LINK
1. Close all Microsoft applications (Word, Outlook, Excel, etc.)
2. In Time Matters: Click FILE … SETUP … GENERAL … WORKSTATION LEVEL
3. Remove the checkmark next to "Outlook 2000 and later"
4. Click OK and close the setup box
5. Repeat step 2, and verify that the box is now checked (it will do this automatically)
6. Click OK and close the setup box again
7. Open Outlook and verify that the "TM Connect Email" button appears

8. From inside Outlook, click TOOLS … OPTIONS
9. Click the Time Matters tab:
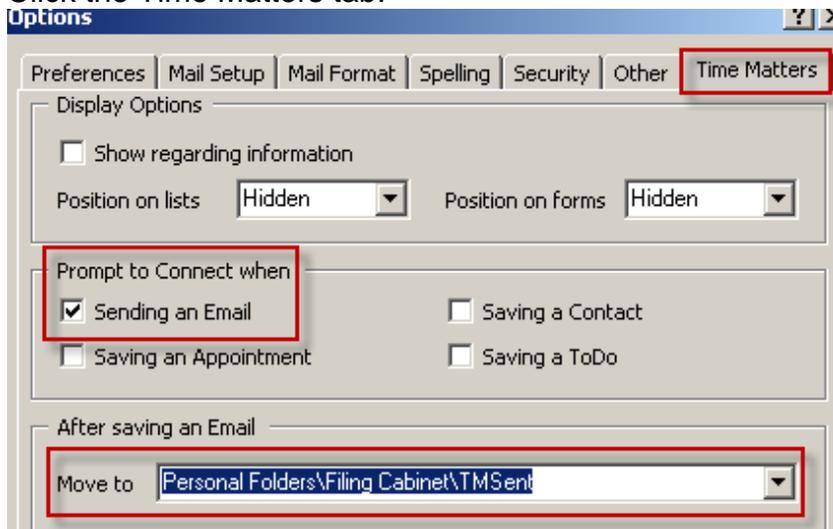
10. Fill in the fields as displayed above. It is also possible to save emails in a special Outlook folder for future reference.

PART 2: DISABLED ITEMS

If Outlook detects a problem with the link, it will disable the connection. To verify that the connection is active:
1. Open Outlook
2. Click HELP … ABOUT OUTLOOK
3. Click the "Disabled Items" button
4. Verify that the link is not inactive – if it is, click and choose "Enable"

PART 3: MANAGING EMAIL ATTACHMENTS UTILITY

If Time Matters email attachments are causing what is known as "Attachment Bloat", use the Manage Email Attachments utility:

1. From the top menu click FILE … UTILITIES … MANAGE EMAIL ATTACHMENTS
2. Choose the date range and set the size to a small number
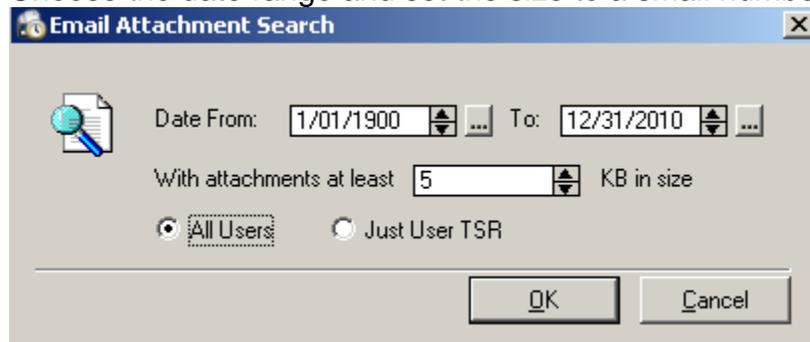
3. Click OK
4. When a list of attachments appear, open up each one (by clicking the triangle) and then click the TMSave button.
5. Save the document in the client's folder
6. Click "Delete" to delete the attachment (it is already saved in the client's folder and doesn't need to be saved as an attachment)
7. Repeat for all attachments, and then close the window