TEAM Software by WORKWAVE

TemplaCMS Newsletter

V6.1.0 | Update 2024.08 | August 2024

COMMERCIAL STATEMENT

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Introduction

This document details changes made to TemplaCMS and features added this month as an update release following the formal release of version 6.1.0.

All menu paths provided are based on the standard UK menu structure, as such certain options may be found in different locations where the menu navigator has been altered by the client.

Training

Note: Where new functionality has been introduced, it is imperative that a full understanding of the implications for set-up and use are resolved by the client.

In some instances, where the new functionality is minimal, the TEAM Software Customer Success Manager can cover this with the client. However, where the functionality is not minimal or has implications elsewhere in the system, training must be provided by the TEAM Software implementation team to the client, a note to this effect will be added to the relevant sections.

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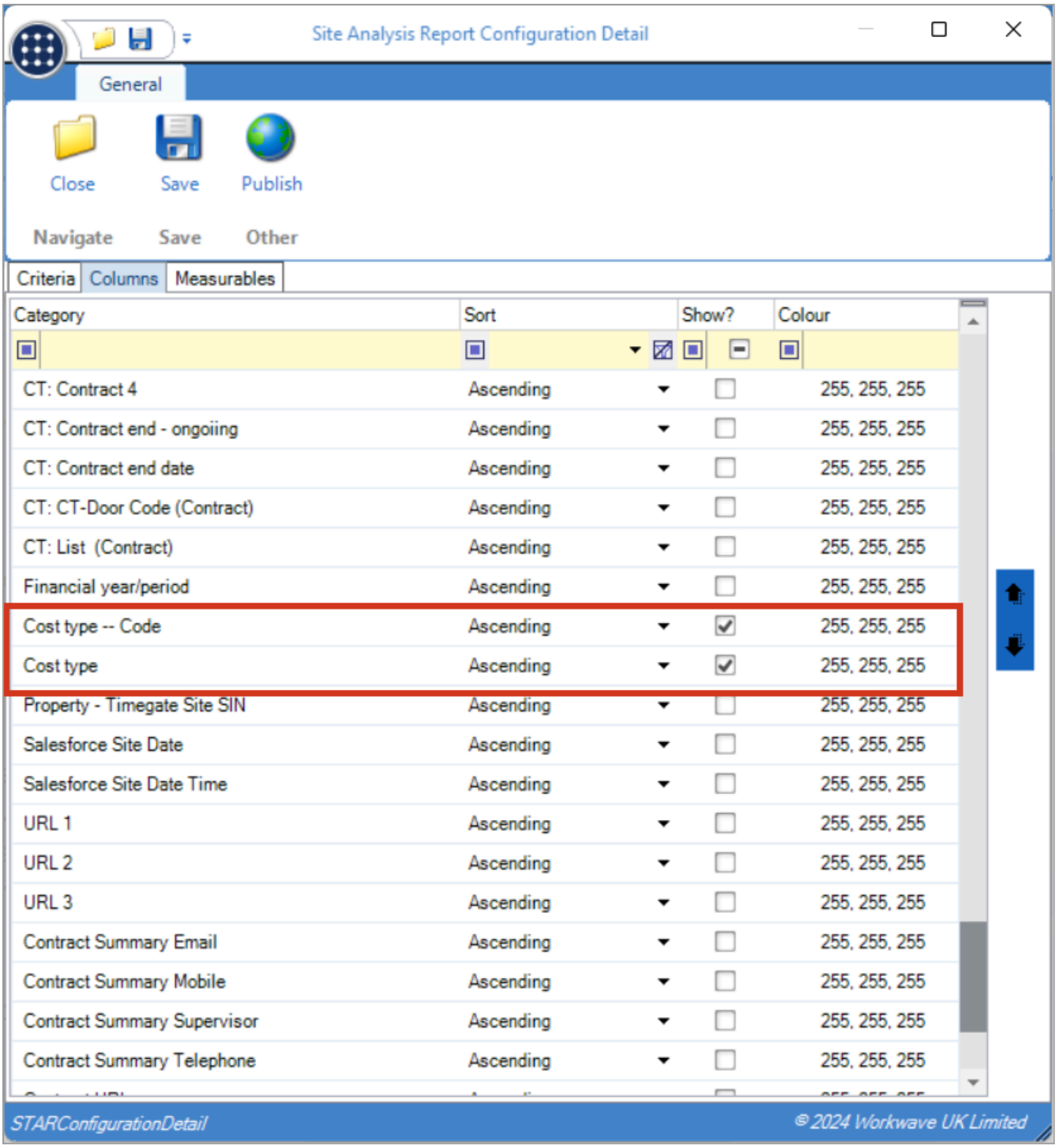
Site Analysis Report by Cost Type

Background

Within the measurables of a site analysis report configuration, any number of budget groups or cost types can be selected for reporting, with transactions summarised by the selected columns. It is now possible to select to summarise by cost type so the cost types within a budget group measure can be split to discrete rows.

Site Analysis Reports

Two new columns have been added to the columns list of a Site Analysis Report Configuration:



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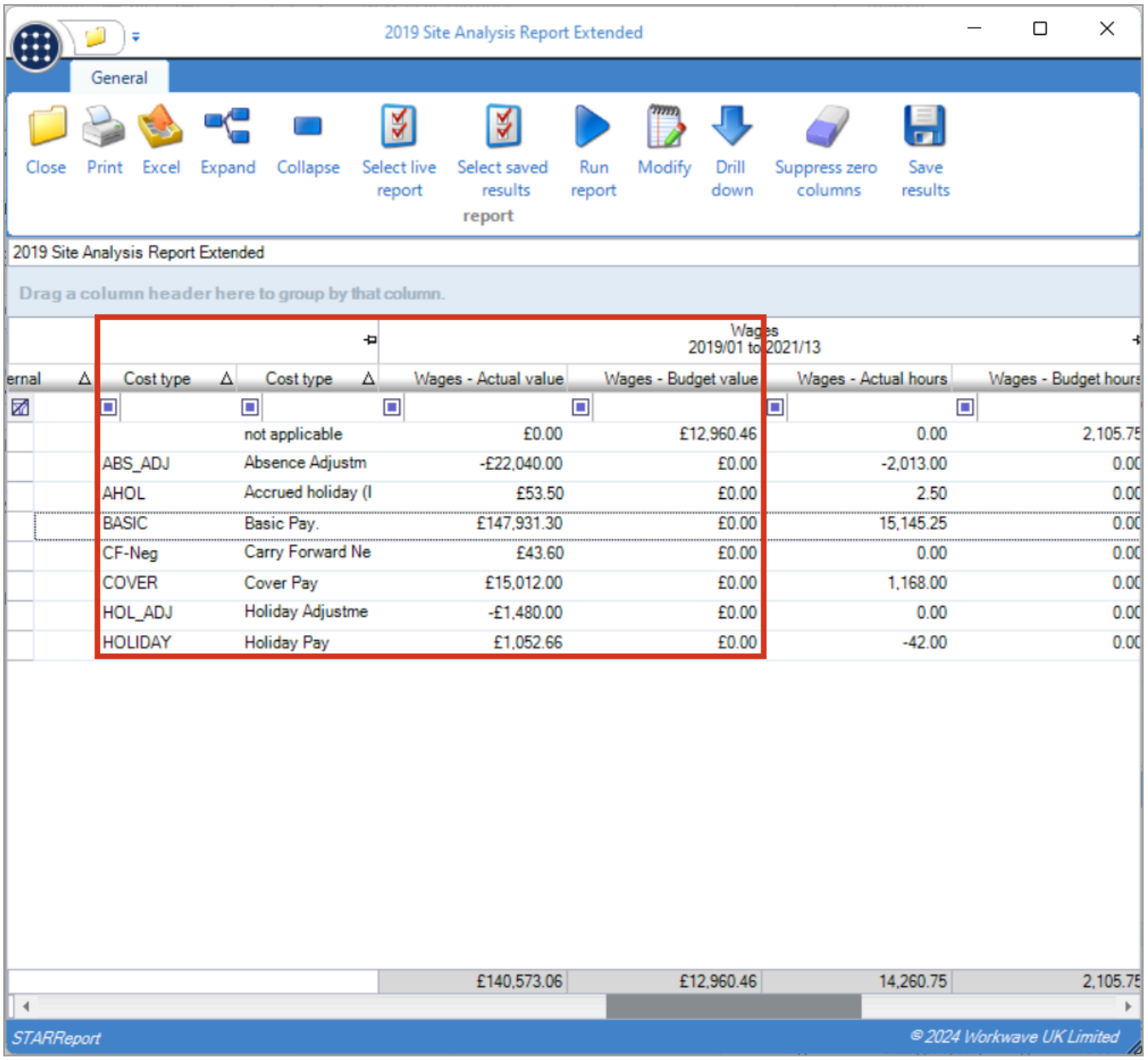
When either new column is selected to be included, the resulting site analysis report will now additionally split and summarise by cost type. When doing so, any budget values are put onto a separate *not applicable* cost type:



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Roster Manager Include Options – Apply on Change

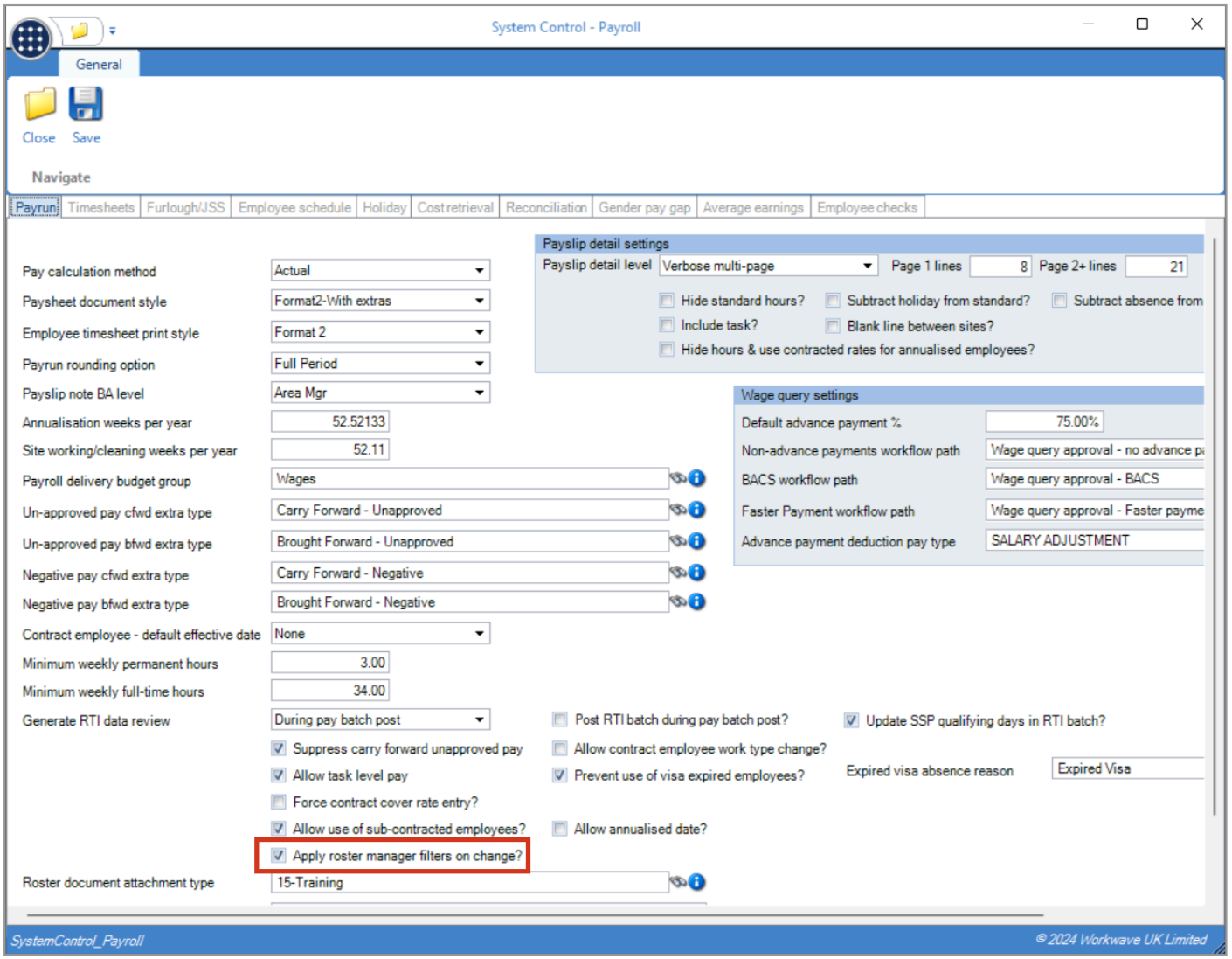
Background

The Roster Manager includes a number of *Include only* options such as showing only sites with cover or absence. When a change is made to an employee row, the effect of this can cause the site to be filtered out immediately (e.g. if including only cover, and the cover is removed).

Whether this filter is immediately applied or not is now configurable on System Control, with the ability to override on the Roster Manager.

System Control – Payroll

A new option has been added to the General tab of System Control – Payroll:



At installation time this flag will be automatically ticked, thus preserving existing functionality.

Roster Manager

A new taskbar toggle option has been added to the *Include only* section of Roster Manager for *Apply on change*, defaulting to the System Control option described above when the Roster Manager is opened, but allowing subsequent change.

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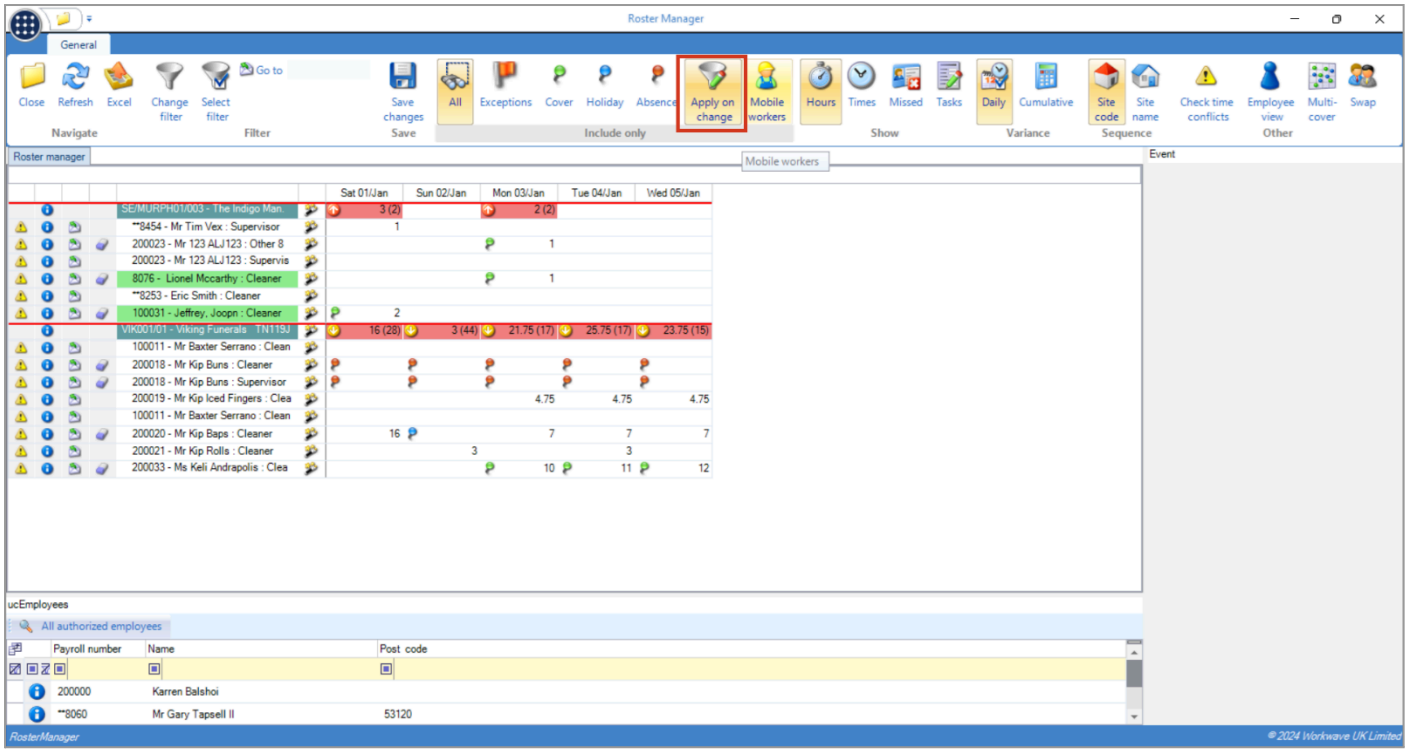

When toggled on, any changes to the roster manager will immediately result in the filter being reapplied, as is the current roster manager behaviour. When toggled off, changes will not cause immediate re-filtering, so the site will remain visible even though it no longer meets the criteria. It will remain visible until the changes are saved, at which point the rebuild of the grid will apply the filter.

This button applies to filtering of:

- Exceptions
- Cover
- Holiday
- Absence

Note: This option is not stored in user settings files so will re-default from the System Control option when the Roster Manager is reloaded.

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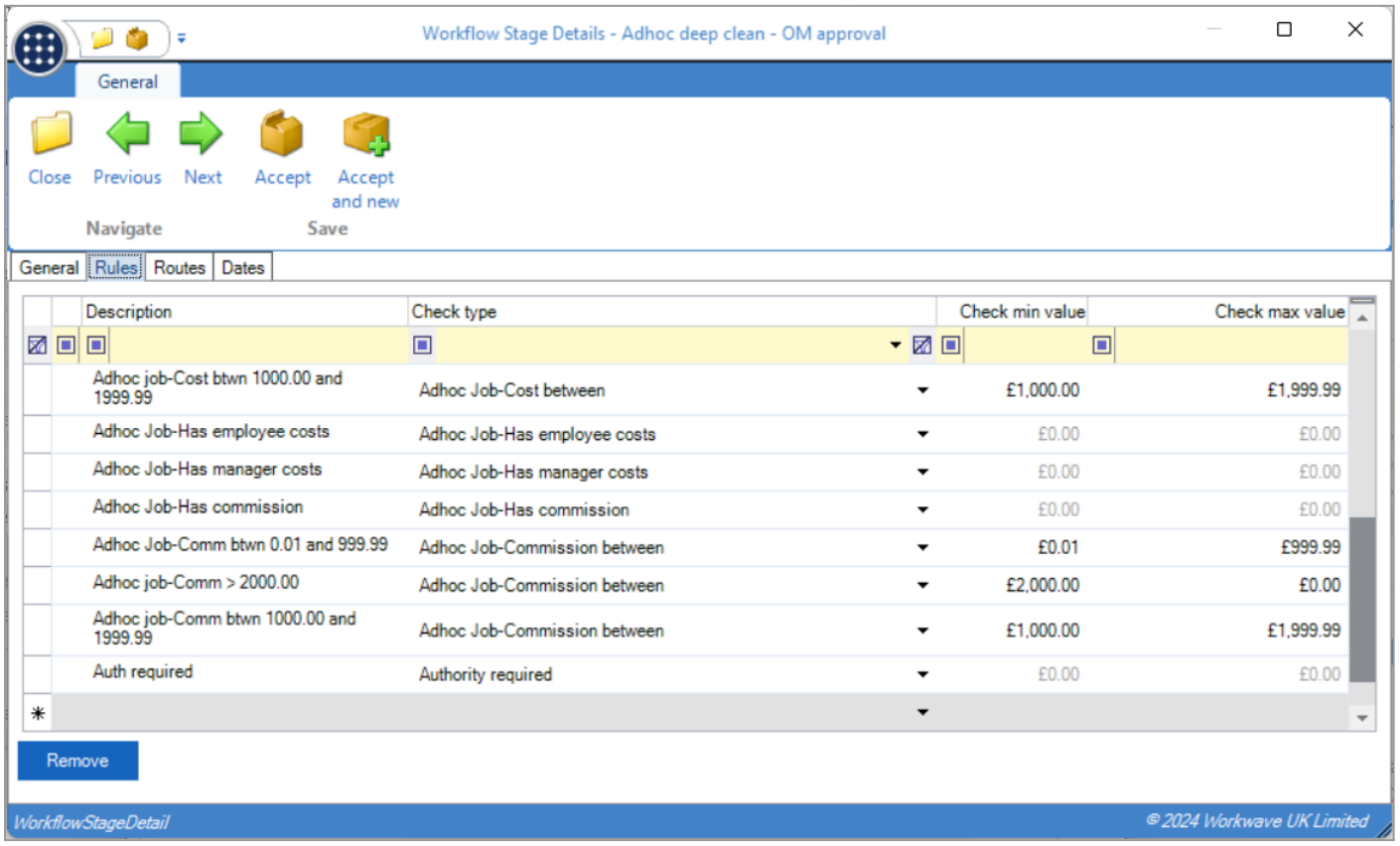
Ad Hoc Job Commision Workflow

Background

New workflow rules have been added for ad hoc job approval & ad hoc job commission change workflow paths to allow routing of jobs based on commission.

Workflow Paths

On workflow paths of type *Adhoc job* and *Adhoc job commission change*, two new rule types of *Adhoc Job-Has commission* and *Adhoc job commission value between* are now available:



Adhoc Job Approval

When an adhoc job is sent for approval on either an Adhoc job or Adhoc job commission change path, and one of the new rules exists on a workflow path's stage, the job is checked to see if commission exists, or if commission falls between the rule value range. If so, the adhoc job will be routed to the appropriate authorising user.

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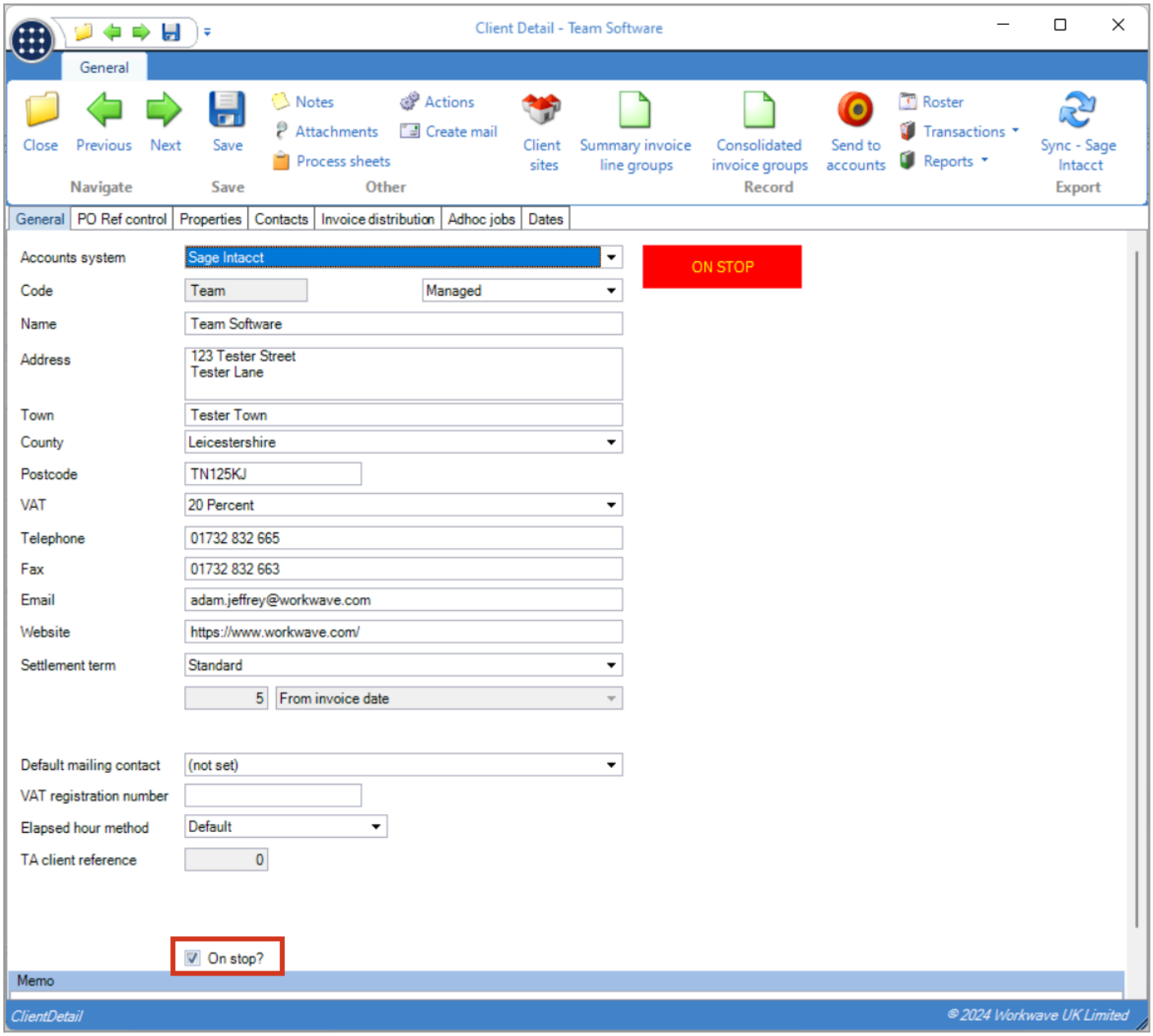
Client On Stop Access

Background

Client on stop status has previously only been accessible where a client account exists in Dimensions. This has now been enhanced to allow on stop status to be maintained for locally defined clients.

Clients

A new checkbox is now available on all clients:



The existing ON STOP message also appears at the top of the client along with being visible on the clients list.

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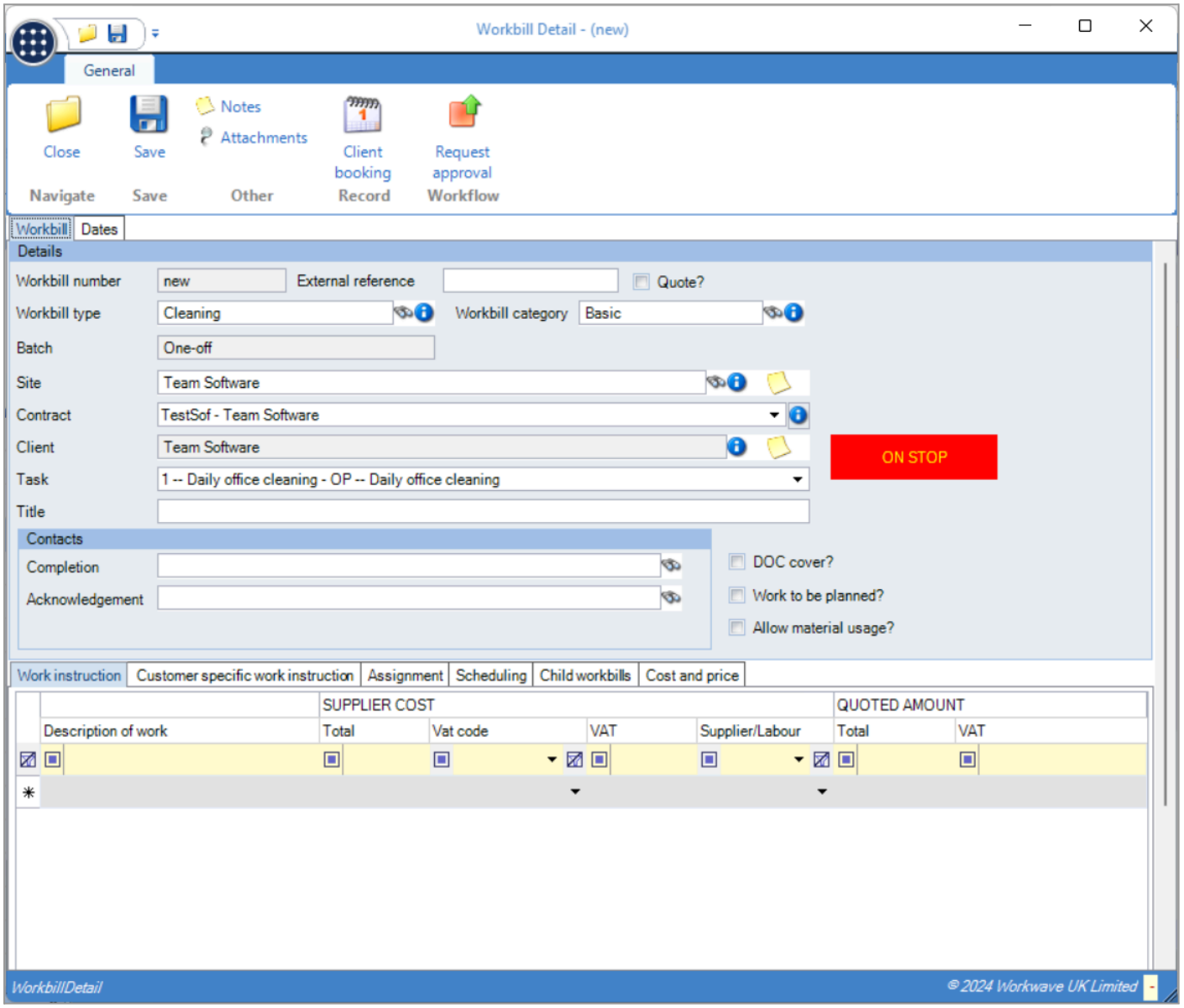
Workbills

While access to the credit control information of a client is available for suitably authorised users on workbills assigned to a Dimensions client, the on stop status of non-Dimensions clients is now visible on workbills via a similar ON STOP message to that shown on clients.



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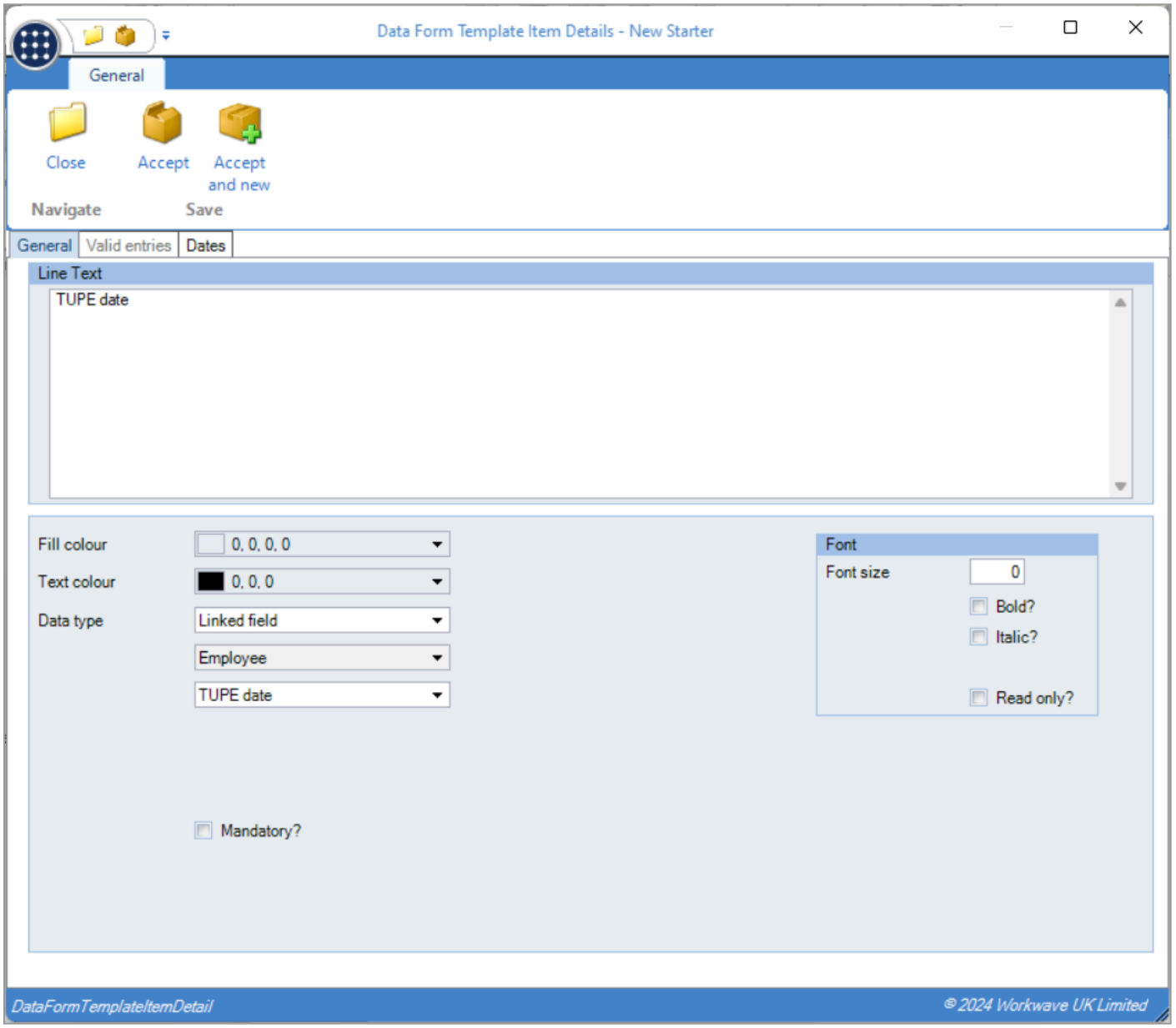
Data Form Template – TUPE Date

Background

TUPE date was recently added as a maintainable field on employees. This field can now be used as a linked field on data forms.

Data Form Templates

A new linked field type of TUPE date can now be added to data form templates.



Data Forms

Data form entry has been extended to handle the TUPE date linked field including on mobile. Upon application, the TUPE date will be transferred to the employee.

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TUPE Details Additional Columns

Additional columns have been added to TUPE details for:

- Employee email
- Employee fax or mobile
- Auto enrolment status
- Pension group
- Employer pension contribution %

Note: These fields will only be populated on new, or regenerated TUPE batches.

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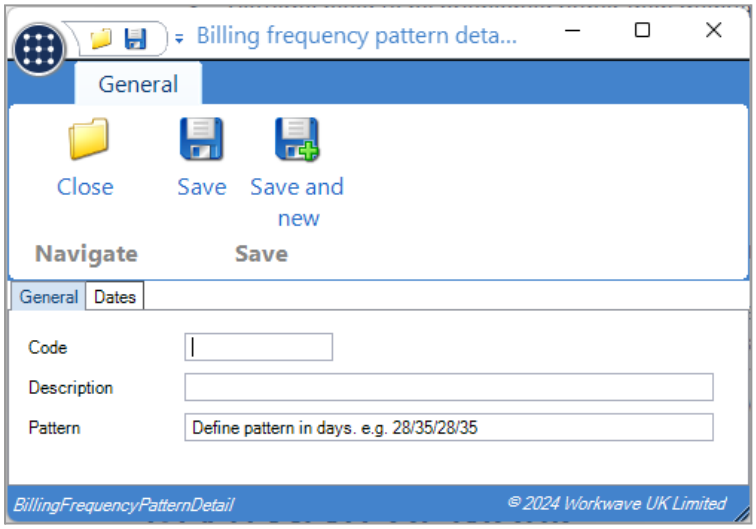
Variable Billing Patterns

Background

TemplaCMS allows Contract Billing lines to be defined with variable billing patterns, where the billing pattern is defined against each line using a text entry field. This has been amended to allow the maintenance of predefined billing patterns, which are then assigned to the lines by selecting from a list.

Billing Frequency Patterns

A new *Billing frequency patterns* option has been added to the navigator under Maintenance > Billing, where any number of billing patterns can be defined:



On installation of this upgrade, Billing Frequency Patterns will have been automatically created for each pattern currently in use on Contract Billing lines. These should be reviewed and given meaningful codes and descriptions to replace the generated ones.

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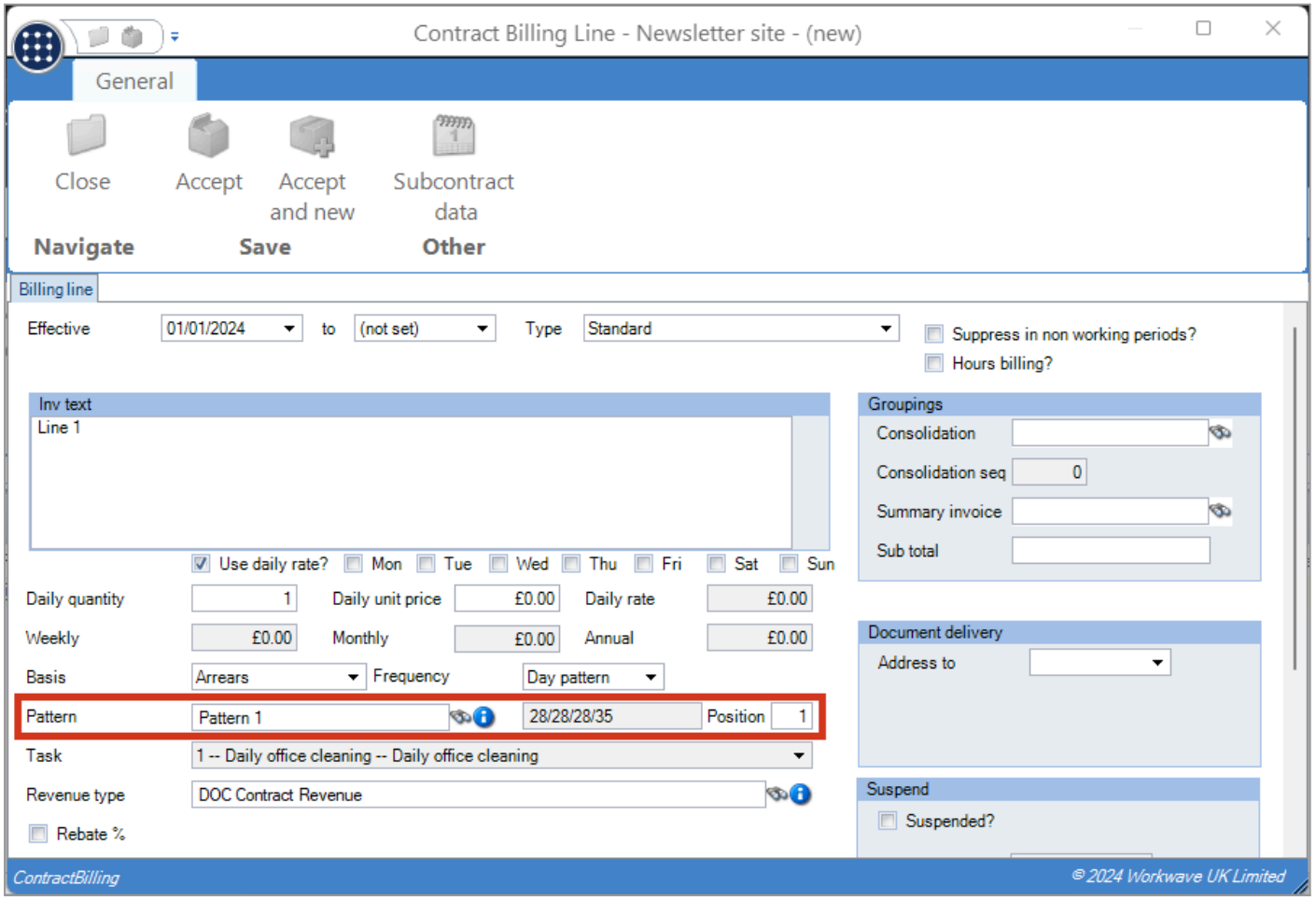
Contract Billing

When using the *Day pattern* frequency, the billing pattern is now selected from the list of predefined patterns, with the pattern being displayed alongside:



Migration Wizard - Contract Billing

New columns have been added to the Contract Billing import template for the Frequency pattern code and position. The Frequency Period column now allows entry of Day_pattern in addition to the existing Weeks, Months, and Years.

	X	Y	BO	BP
ency	Frequency period	Is recharge	Frequency pattern	Frequency pattern position
	Months			
	Months			
	Day_pattern		Code1	1
	Day_pattern		Code2	
	Day_pattern		Code3	3

When using Day_pattern, the row should be set to use Daily rate (Is use daily rate) and the appropriate days should be defined in the Is include in daily rate… columns.

Note that the new columns are only imported when the Frequency Period is set to Day_pattern and the row is not set to be Recharge, Workbill, or Hourly Billing.

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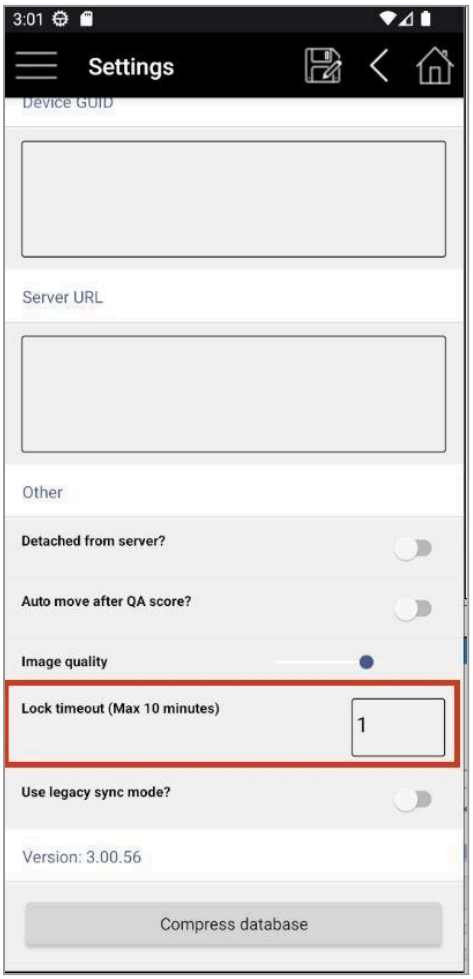
Templa Mobile – Lock Timeout

Background

Previously, the Templa Mobile app required a PIN to be entered each time the user navigated away from and back to the app. The mobile app has been enhanced to provide a lock timeout.

Settings

The settings screen now allows users to enter a Lock timeout in minutes. By default, it is set to one minute and a maximum of ten minutes can be defined.



When the user navigates from the app and returns before the timeout period has expired, the user will not be required to enter a PIN.

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Log Numbers

This enhancement update contains the following log numbers:

WI2253

WI4080

WI4170

WI4171

WI4202

WI4203

WI4204

WI4208

WI4212

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