

TemplaCMS Newsletter

V6.1.0 | Update 2024.10 | October 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.

DATA DISPOSAL AUTOMATION

Background

Data disposal has previously required a user to manually run the process when required. It is now possible to define a frequency on each data disposal configuration so the jobs can be scheduled to run regularly.

Data Disposal

Each data disposal configuration now has a frequency on it being one of:

- Days
- Weeks
- Months
- Years
- Once only

When set to anything other than **Once only**, a frequency count must also be entered.

) ,		Data Dispos	al		_		×	
-	General								
		- 2							
Close	Expand	Collapse Refresh							
	Na	vigate							
Data dis	posal								
			User	Guide					
Data di	sposal allo	ws an irreversible perman	ent delete of data from a r	number of areas of T	FemplaCMS.				
You she	ould make s	sure you have a valid back	up of your database befo	re running any data	disposal.				
Whilst (data dispos nended that	al can be performed when you perform this out of off	users are active, there n ice hours.	nay be a performanc	e degradation for the la	rger areas, so	itis		
Each di keep ar sent to Having Pressir As the l through be reins	Each disposal process below can be configured and run individually. Read the notes for each, set the number of years of data you wish to keep and nominate when you want to run the disposal before pressing Run. Note that if you do not specify a date/time, the disposal will be sent to the batch queue for immediate processing. Having pressed Run, the disposal will be updated to a Queued status. This means the batch job has been created, but not yet started. Pressing Abandon at this point will instruct the batch job to be ignored. As the batch job is processed, the status will update to Running with a record count of how much data will be removed, and progress through this. You can still Abandon a running disposal, though this may not take immediate effect, and any already disposed data cannot be reinstated. The numbers of rows affected by each disposal can be seen via the History button.								
			Alert Me	essages					
This wi	ill dispose o	of all user alert messages	Inactive				History		
ago		defined number of years	Last run	29/11/2023	∞ 11:33		Defreeh		
			Years to keep	1			(en con		
			Next run	26/09/2024	▼ 00:00	A			
Frequency 1 Months - Run									
						_			
			Contract Billi	ng Definitions	i				
This wi that are	ill dispose of more than	of all contract billing rows the defined number of	Inactive			H	listory		
DataDisp	old, and also nosal	pre-date the contract	l	20/11/2022	- 11.50	© 2024 Work	wave UK L	Limited	

When a frequency is entered and the batch job has finished, another batch job is then automatically scheduled to run based on the configured frequency.

SUPPRESS PAYROLL COSTS IMPORT

Background

When a pay batch is posted, a batch job is created to handle the import of payroll costs from the payroll processing system. Previously, for certain TemplaCMS configurations and environments, payroll costs may never be able to be imported so the batch job would run until manually stopped. It is now possible to configure datasources to suppress the payroll costs import.

Datasources

A new checkbox has been added to the Payroll tab of payroll datasources.

	•	Data	source Details - Den	no payroll.			_		×
General									
🣁 🔶 📦									
Close Previous Next	Save Save	and Control							
Navigate	ne Save	w details Other							
General Payroll Pay freq	uencies Holiday	Pay on demand	Time & attendance	Email preferences	Payslip details	Dates			
Linked datasource	Demo accounts			•	Wage budget o	override to	lerances		
					Ur	Ider	Over		
					Hours	0.00 %	0).00 %	
Timesheet entry style	Adjust by except	tion		•	Value	3.00 %	().00 %	
									- 11
Timesheet print seq.	Employee/Task			•					
Allow basic hours entry	Timesheets With	Contracted and N	on-Contracted Emplo	yees 🔻					- 11
Generate RTI data review	During pay batch	n post		-					- 11
									- 11
	Post RTI bate	h during pay batch	post?						- 11
Timesheet completion	Timesheet comp	oletion 2		6					- 11
worknow path	Override mor	nthly pay batch end	date?						- 11
Holiday pay adjustment configuration	Standard UK			6					
									- 11
Advance workflow on f	reeze?	Exception state	es only?		ariable patterns	7			
Advance worknow on neeze? Exception stages only? Enable contract extras per week? Allow pay batch 'Tick all'?				Enable	Finable on employee portal?				
Allow timesheet weekly freeze?				Payroll	Payroll journal required?				
Export pay and P60s to Modus? Export new employees to Modus? Export timesheet site assignments to Modus?						'			
Suppress payroll costs	s import?								
Vacancy processing									
DatasourceDetail						© 202	4 Workw	ave UK L	imited _

Pay Batches

When a pay batch is posted, the batch datasource's **Suppress payroll costs import** status is checked and a payroll costs import job is only created if the datasource is not set to suppress import.

Additionally, regardless of the new flag, payroll costs imports only attempt to import costs within 24 hours of the pay batch being posted. Should an import be required after 24 hours after batch posting, manually importing via the pay batch taskbar option to **Import employers contributions** ignore this 24 hour check.

EMPLOYEE USE BEFORE START DATE

Background

Previously, when entering an employee onto a contract or timesheet, a warning would be displayed when the assignment start was before the employee's start date. This check can now be configured so it is no longer just a warning, thus preventing the contract or timesheet employee from being assigned.

System Control - Payroll

A new checkbox has been added to the Payroll tab of System Control:

	Syster	n Control - Payroll		- D X
General				
Close Save				
Navigate				
Payrun Timesheets Furlough/JSS Empl	loyee schedule Holiday Cost retrieval Reco	onciliation Gender pay gap Avera	age earnings Employee checks	
		Payslip detail settings		
Pay calculation method	Actual 🗸	Payslip detail level Verbose mul	lti-page 💌 Page 1 lines	8 Page 2+ lines 21
Paysheet document style	Format2-With extras	Hide star	ndard hours? 🔲 Subtract holiday from s	tandard? Subtract absence from s
Employee timesheet print style	Format 2	Include ta	ask? 📃 Blank line between site	s?
Payrup rounding option	Full Period	Hide hour	rs & use contracted rates for annualised em	nployees?
Payslin note BA level	Area Mor 🔻		Wage query settings	
Annualisation weeks per year	52.52133		Default advance payment %	75.00%
Site working/cleaning weeks per year	52.11		Non-advance payments workflow path	Wage query approval - no advance pay
Payroll delivery budget group	Wages	& ()	BACS workflow path	Wage query approval - BACS
Un-approved pay cfwd extra type	Carry Forward - Unapproved	6	Faster Payment workflow path	Wage query approval - Faster payment
Un-approved pay bfwd extra type	Brought Forward - Unapproved	6 0	Advance payment deduction pay type	SALARY ADJUSTMENT
Negative pay cfwd extra type	Carry Forward - Negative	6 0		
Negative pay bfwd extra type	Brought Forward - Negative	6 0		
Contract employee - default effective date	None 👻			
Minimum weekly permanent hours	3.00			
Minimum weekly full-time hours	34.00			
Generate RTI data review	During pay batch post 🔹	🔲 Post RTI batch during pay ba	atch post? Vpdate SSP qualifyi	ng days in RTI batch?
	Suppress carry forward unapproved pay	Allow contract employee wo	ork type change?	
	Allow task level pay	Prevent use of visa expired	employees? Expired visa absence re	eason Expired Visa
	Force contract cover rate entry?			
	Allow use of sub-contracted employees?	Allow annualised date?		
	Apply roster manager filters on change?	Allow employee use before	start date?	
Roster document attachment type	15-Training	Ø()		
SystemControl_Payroll				© 2024 Workwave UK Limited

At installation time, this checkbox is set to selected, preserving the existing processing.

Contract and Timesheet Employee Assignment

When adding an employee to a contract or timesheet, the new **Allow employee use before start date?** option is taken into account, and the existing check of the assignment start to the employee's start date will be a warning or error accordingly.

P&L DRILLDOWN **R**EPORT

P&L Drilldown Report Nominal Account Code

A new Nominal Account column has been added to the P&L Drilldown Report to show the nominal account code for each transaction row.

	₽ ₽	&L Dri	ll Down -	Standard P Criteria	&L for Perio - Datasourc	d 2021-01 to 2021-13 e: Demo accounts	3 : all P&L ba	_		×
(General									
	3	E								
Close	Print	Excel	Expand	Collapse	Source					
			report							
P&L Drill Do Criteria D	wn - Stan atasource	dard P&L e: Demo a	for Period 202 ccounts	21-01 to 2021-1	3 : all P&L base	d on site's analysis Use conve	erted values			
Dragage	lump be	andarba	aro to group	by that column						
	Tumn ne		re to group		- D - 1					_
	e -	Cost typ	De ∆+⊐t	sudget group	-P Period	-P I ransaction date	Nominal account 4	Actu	al value 🕫	
	0	DOC C	iontract Re		2021-03	01/06/2020 00:00	005EA		-£12 14	5
COMPE	- 0	DOC C	ontract Re		2021-03	01/06/2020 00:00	005EA		-£5.02	-
COMPE	<u>,</u>	DOCIC	ontract Re		2021-03	01/07/2020 00:00	005EA		-£12.14	
COMPE	- 0	DOC C	ontract Re		2021-03	01/07/2020 00:00	005EA		-£5.02	
COMPE	- 0	DOC C	ontract Re		2021-03	01/08/2020 00:00	005EA		-£12.14	
COMPE	0	DOC C	ontract Re		2021-03	01/08/2020 00:00	005EA		-£5.02	
COMPE	Q	DOC C	ontract Re		2021-03	01/09/2020 00:00	005EA		-£12.14	
COMPE	Q	DOC C	ontract Re		2021-03	01/09/2020 00:00	005EA		-£5.02	
COMPE	Q	DOC C	ontract Re		2021-03	01/10/2020 00:00	005EA		-£12.14	
								-£	37.486.23	-
4)	Þ
PLDrillDown							@ <u>202</u>	4 Workwav	e UK Limite	ed 🖌

SENDING ABSENCE HOURS TO HR3

Note: This modification is only applicable to Australian installations that use the Hr3Pay payroll solution.

Background

The export of pay data from TemplaCMS for the payroll includes pay values summarised by pay type. Absence that is unpaid does not equate to a pay type, and as such is not communicated to the payroll.

This enhancement allows the hours of unpaid absence to be communicated to Hr3Pay, so details can be shown on the payslip.

System Control - Payroll

New options have been added to the Payroll tab of System Control.

🚗 🏓 🗧 🖶		Datasou	rce Details - Cleaners Pay	yroll		_		×
General								
📁 🔶 📫								
Close Previous Next	Save	details						
Navigate	Save	Other						
General Payroll Pay free	uencies Pay	on demand Time & atter	idance Email preference	es Payslip	details Dat	tes		
Linked datasource	(none)			•	Wage bud	lget override tole	ances	
						Under	Over	
					Hours	0.00 %	0.00) %
Timesheet entry style	ANZ shifts			-	Value	0.00 %	0.00)%
	Auto-tick	all shifts?						
Timesheet print seq.	Employee/Ta	ask		•				
Allow basic hours entry	Timesheets	With Contracted and Non-	Contracted Employees	•				
Generate RTI data review	During pay b	patch generation		•				
On cost journal level	Summarised	I		-				
	Post RTI	batch during pay batch pos	t?					
Timesheet completion	Timesheet of	completion.		∞ 1				
Un-paid absence								
👿 Send un-paid absend	ce to payroll?	Absence hours pay type	unpaid absence	Ø	0			
	Override	monthly pay batch end da	e?					
Rates supported on pa	yrun interface	?						
Advance workflow on freeze? Exception stages only? Allow variable patterns? Allow variable patterns?								
Allow timesheet week	y freeze?	Lockdown by mana	ger?					
Suppress payroll cost	s import?	🔲 Use employee awa	d rate on temp joiners?	Roster	red operator	required for temp	joiners?	
DatasourceDetail						© 2024 Workv	vave UK Li	mited "

Note that as absence has no pay, there is no pay type associated with it. Thus, if the user selects to send unpaid absence to payroll, they must also nominate the pay type under which it is sent.

Pay Batch Post

During the post of a pay batch, the HR3Pay export file is created. If the above checkbox is selected, an additional line is added for each employee with absence and includes the pay type and the employee's total absence hours.

LOG NUMBERS

This enhancement update contains the following log numbers:

WI4198

WI4340

WI4474

WI4514

WI4583



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.