



TemplaCMS Newsletter

V6.1.0 | Update 2024.11 | November 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.

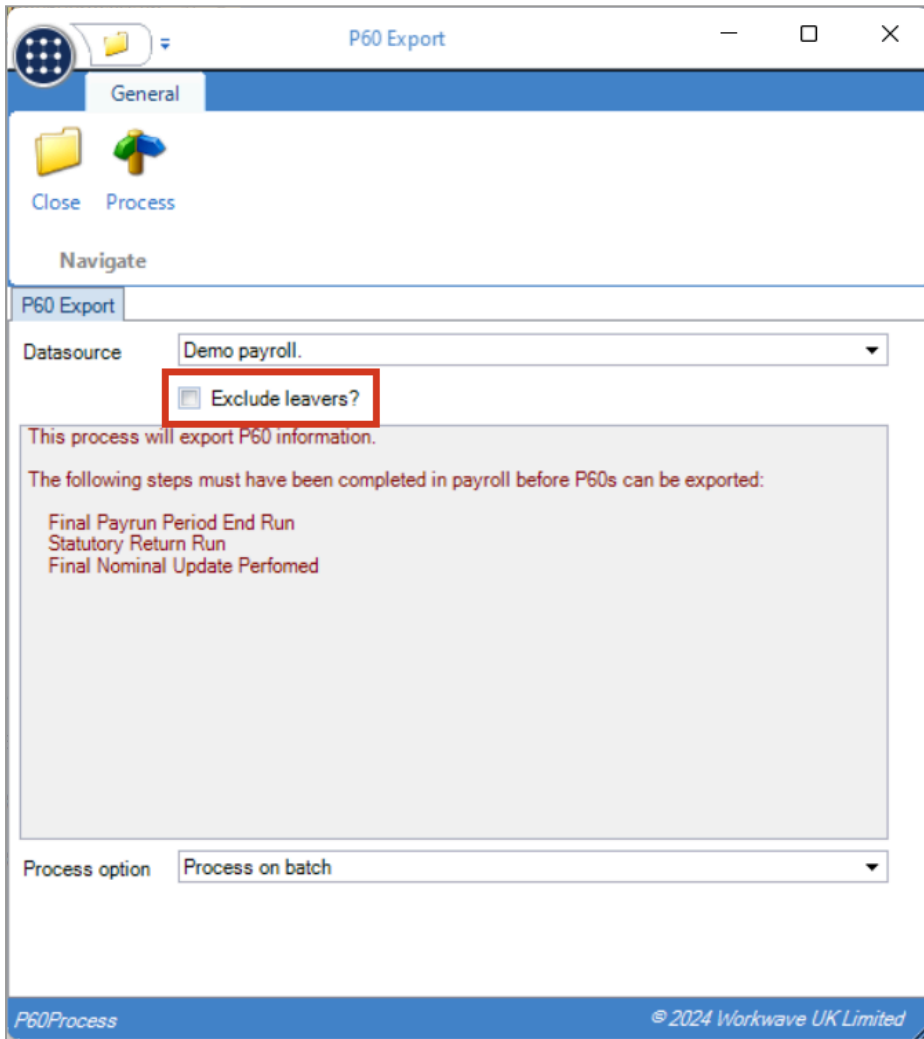
EMPLOYEE PORTAL P60 EXPORT

Background

Previously, when P60s were exported to the Employee Portal, current employees and those that have left in the previous year were exported. It is now possible to exclude P60s for all employees who have left.

P60 Export

A new checkbox has been added to the P60 export when licensed for Employee Portal.



When the P60 export is processed, whether online or on batch, the selected leavers option is taken into account and leavers excluded as required.

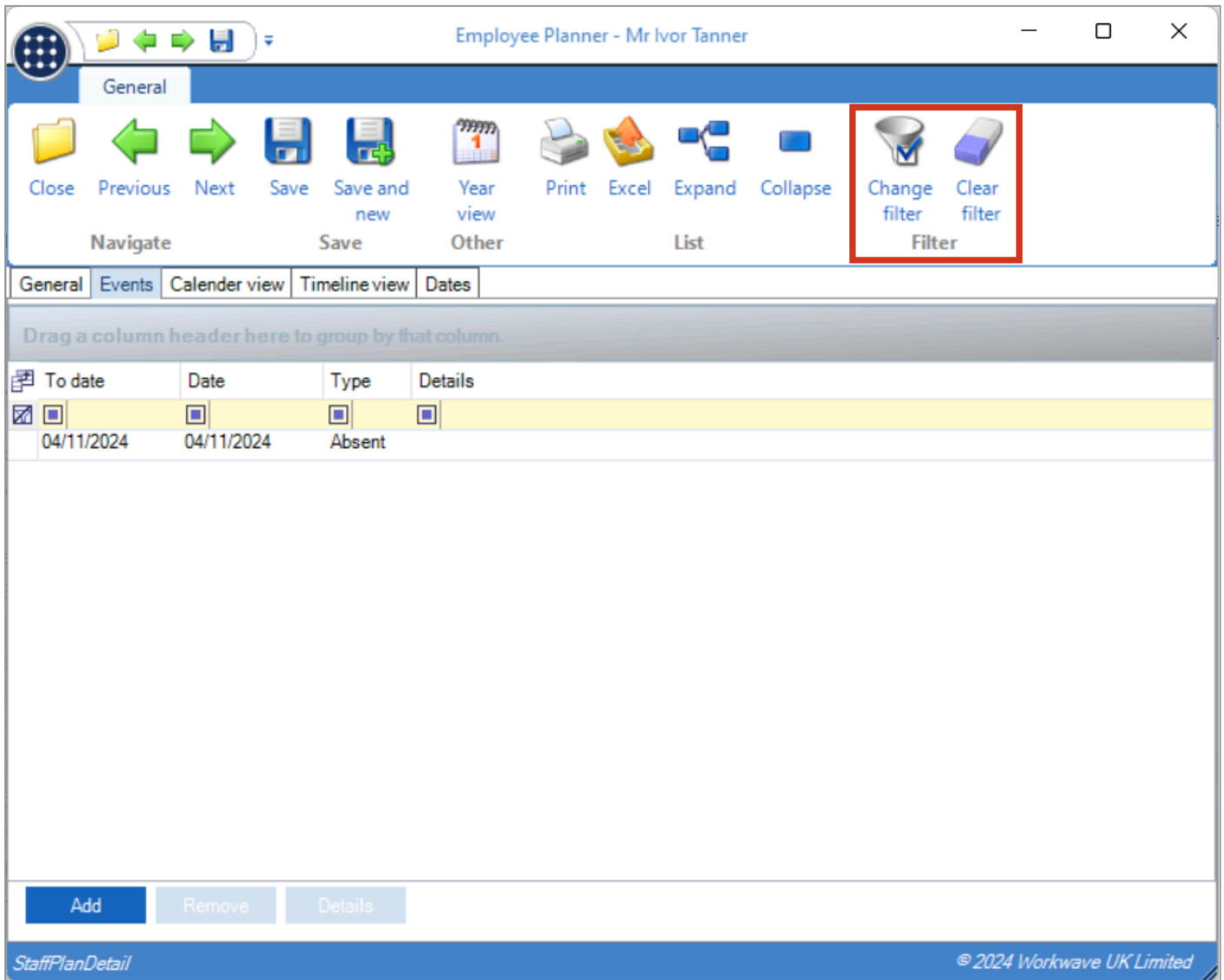
EMPLOYEE PLAN EVENTS GRID FILTER

Background

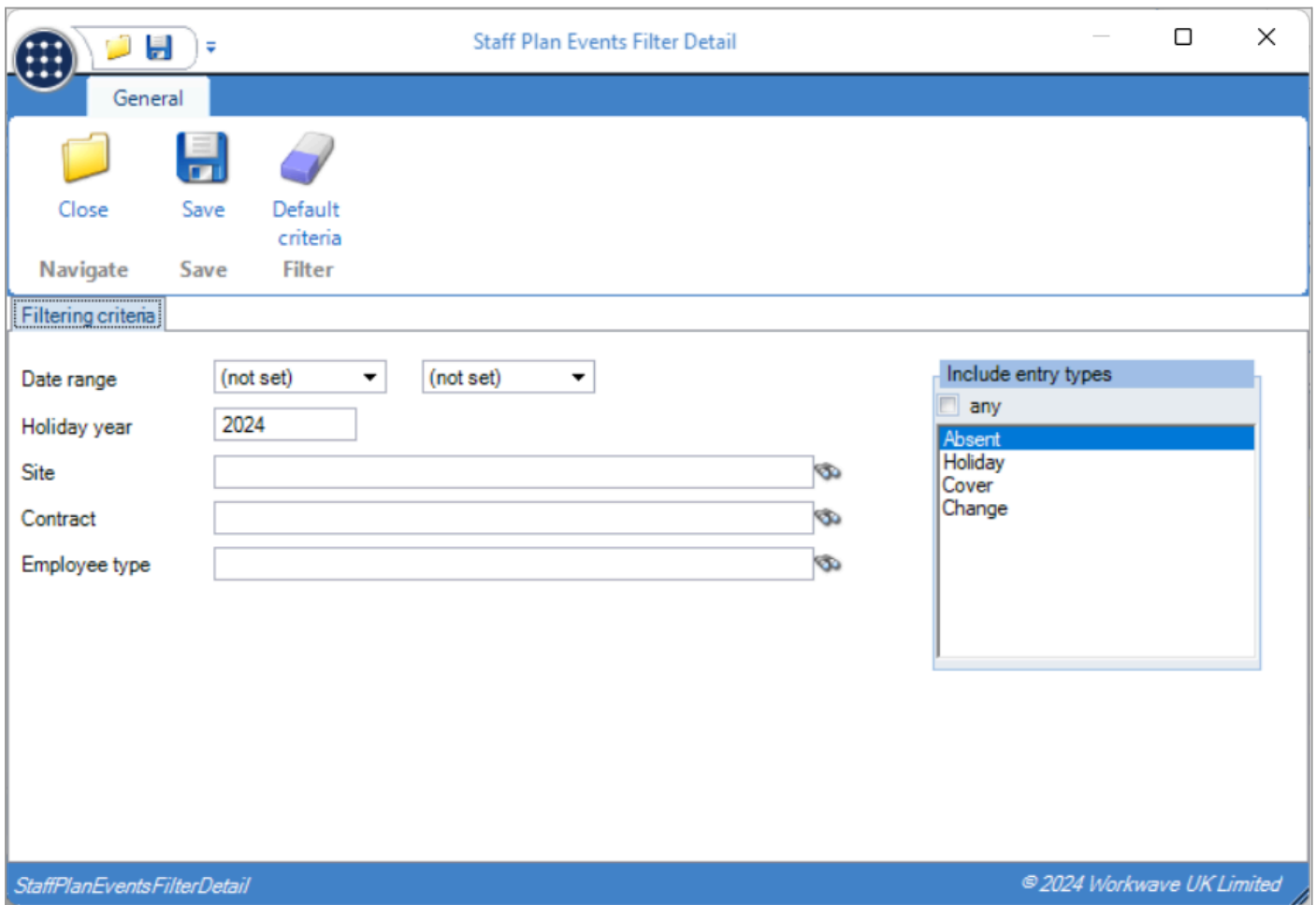
The number of staff plan events on the Events tab of a staff plan can gradually build up over the length of an employee's service. While the in-grid filter row was available previously, information relating to the holiday year (for example) could not easily be filtered. A new taskbar option allows additional filtering to be achieved.

Employee Plan

New taskbar options are now available on the Events tab of the employee plan.



When selected, the Staff Plan Events Filter is displayed.



When a filter is applied, the events on the grid are then filtered to those relevant.

Please note the following details of the employee plan event filter:

- The filter only applies to the employee plan event you have open. Clicking next/previous or closing and opening a new employee plan clears the filter. This filter is therefore not saved to the database.
- As the filter only restricts what is already visible on the grid, no function permissions are applied to the visibility or use of the new filter.

P&L REPORT – EXPORT

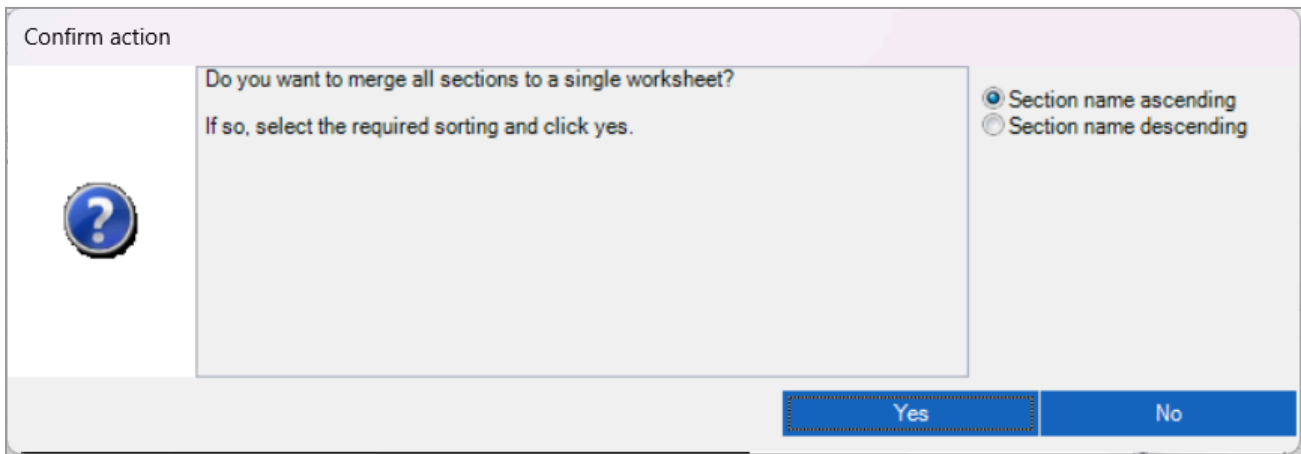
Background

Previously, when exporting a P&L report that contains multiple tabs to Excel, each tab was exported to its own worksheet within a single Excel file. Users are now prompted to optionally merge to a single worksheet with a user-definable sort.

P&L Report Export

When exporting all tabs (sections) to Excel, a new prompt allows the user to merge all sections to a single worksheet with options to sort the grids by:

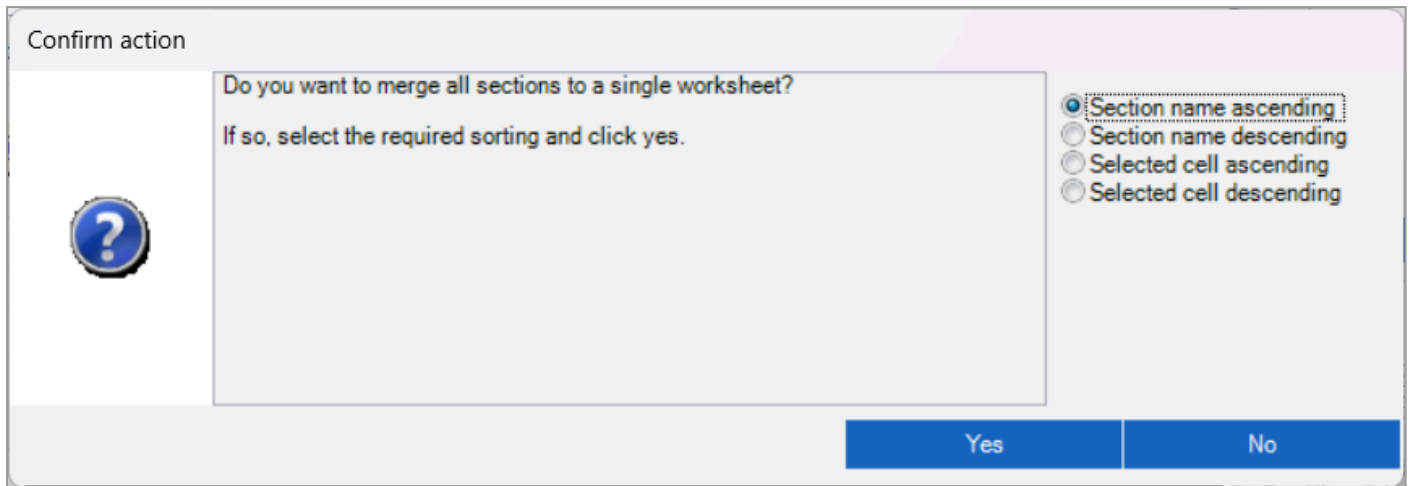
- Section name ascending
- Section name descending



Each individual grid then exports to a single worksheet, with the exception of the ALL tab.

Viking Funerals - Aalborg																														
Description	2019 Total				2019 YTD				2018 Total				2018 YTD				2018 YTD-1				2018-01 21-Apr		2018-02 23-Apr		2018-03 21-Apr		2018-04 22-Apr			
	Act	Bud	BVur%	YrWr%	Act	Bud	BVur%	YrWr%	Act	Bud	BVur%	Act	Bud	BVur%	Act	Bud	BVur%	Act	Bud	BVur%	Act	Bud	BVur%	Act	Bud	BVur%	Act	Bud		
Total costs	3,071		0%	0%	3,071		0%	0%																						
Net profit	3,020	450	14.85%	0%	3,020	450	14.85%	0%																						
	-105%	100%	0%	0%	-105%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Cost of sales																														
Mortality			0%	0%			0%	0%																						
Gross profit	2,914		0%	14.30%	2,914		0%	14.30%	182		0%	182		0%	182		0%	182		0%	182		0%	182		0%	182		0%	182
	100%	0%	0%	0%	100%	0%	0%	0%	100%	0%	0%	100%	0%	0%	100%	0%	0%	100%	0%	0%	100%	0%	0%	100%	0%	0%	100%	0%	0%	
Viking Funerals - Cremation Wing																														
Cost of sales																														
Mortality			0%	0%			0%	0%																						

When a user has selected a single numeric cell on the P&L report prior to exporting, new options display to allow sorting by the selected cell in ascending or descending order.



Again, all tabs then export to a single worksheet sorted by the value of the selected cell across each tab, with the exception of the ALL tab.

In this way, it is now possible to create (for example) a single worksheet containing a P&L for each Area Manager, ranked by their gross profit variance to budget.

INVOICE BATCH IMPORT/EXPORT

Background

An existing process allows the bulk export, edit and reimport of the Client order ref field from within an invoice batch. This process has been extended to allow import of the Our ref field as well.

Invoice Batches

Within the existing Export PO refs on an invoice batch, a new column is available for Our ref.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Bulk invoice	PO ref change										
2	02 December	2024										
3												
4												
5												
6	Id	Client code	Client name	Site code	Site name	Invoice text	Type	Dated	Net value	Gross value	Client order ref	Our ref
7	186938	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-1
8	186939	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-2
9	186940	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	2.00	2.40	wefwef	WSB013-3
10	186941	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	10.00	wefwef	WSB013-4
11	186942	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	12.00	wefwef	WSB013-5
12	186943	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	10.00	wefwef	WSB013-6
13	186944	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	12.00	wefwef	WSB013-7
14	186945	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	10.00	wefwef	WSB013-8
15	186946	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	10.00	12.00	wefwef	WSB013-9
16	186947	WSB013	Winstonlead Ltd	BH/02B	Bill's billy goat shed	wef	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-10
17	186953	WSB013	Winstonlead Ltd	BH/02	Bill's goat shed	test	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-11
18	186954	WSB013	Winstonlead Ltd	BH/02	Bill's goat shed	test	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-12
19	186955	WSB013	Winstonlead Ltd	BH/02	Bill's goat shed	test	Invoice	31/12/2023	1.00	1.18	wefwef	WSB013-13
20	186956	WSB013	Winstonlead Ltd	BH/02	Bill's goat shed	test	Invoice	31/12/2023	2.00	2.40	wefwef	WSB013-14
21	186957	WSB013	Winstonlead Ltd	BH/02	Bill's goat shed	test	Invoice	31/12/2023	0.00	0.00	wefwef	WSB013-15
22	188609	WSB013	Winstonlead Ltd	BH/02C	Bill's new goat barn	test	Invoice	31/12/2023	1.00	1.20	yesplease	WSB013-16
23	188610	WSB013	Winstonlead Ltd	BH/02C	Bill's new goat barn	bill ing	Invoice	31/12/2023	0.00	0.00	no	WSB013-17

When importing after export and amendment, changes to Our ref are now imported as per Client order ref.

SERVICE REQUEST CONTACTS

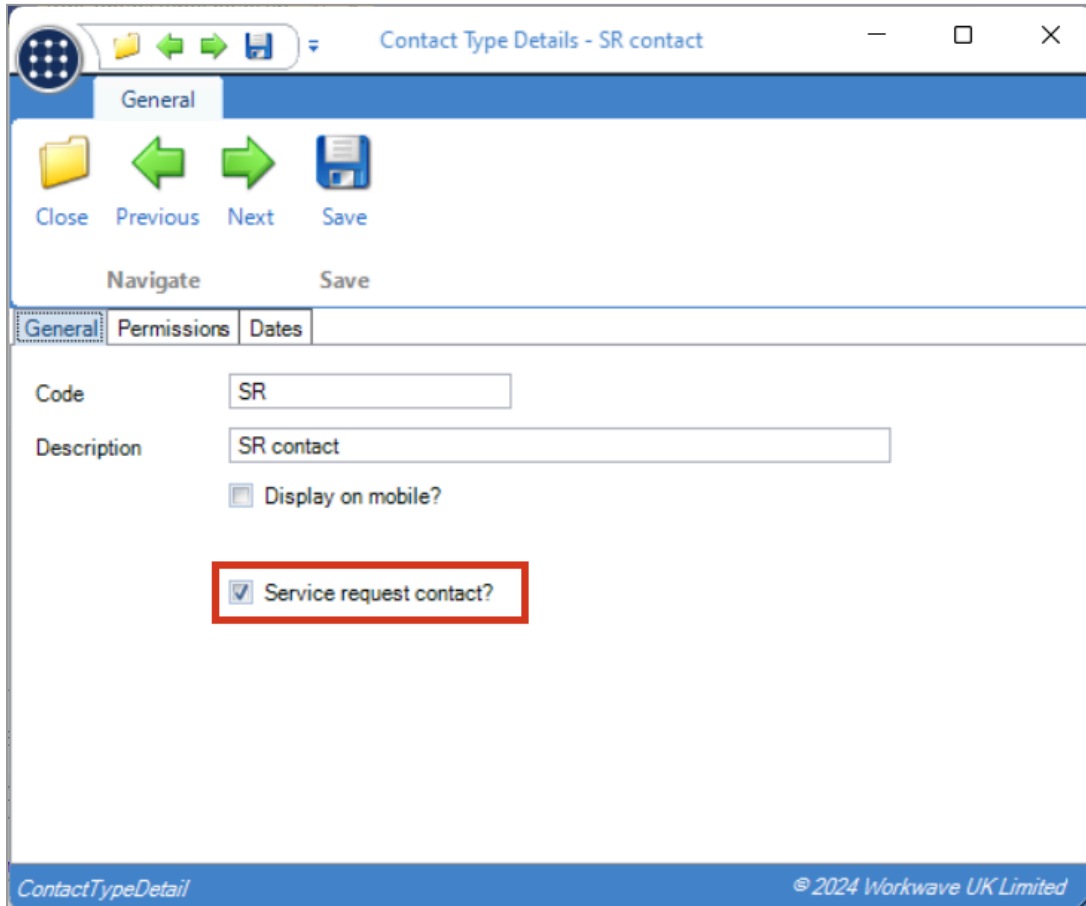
Background

Previously, when a service request was created and assigned, the first relevant contact was selected from the site, client, supplier or contract's site. This contact may not have been relevant for communications relating to service requests.

It is now possible to identify the type of contact that should be used for service requests.

Contact Types

A new checkbox has been added to contact types when licensed for customer service.



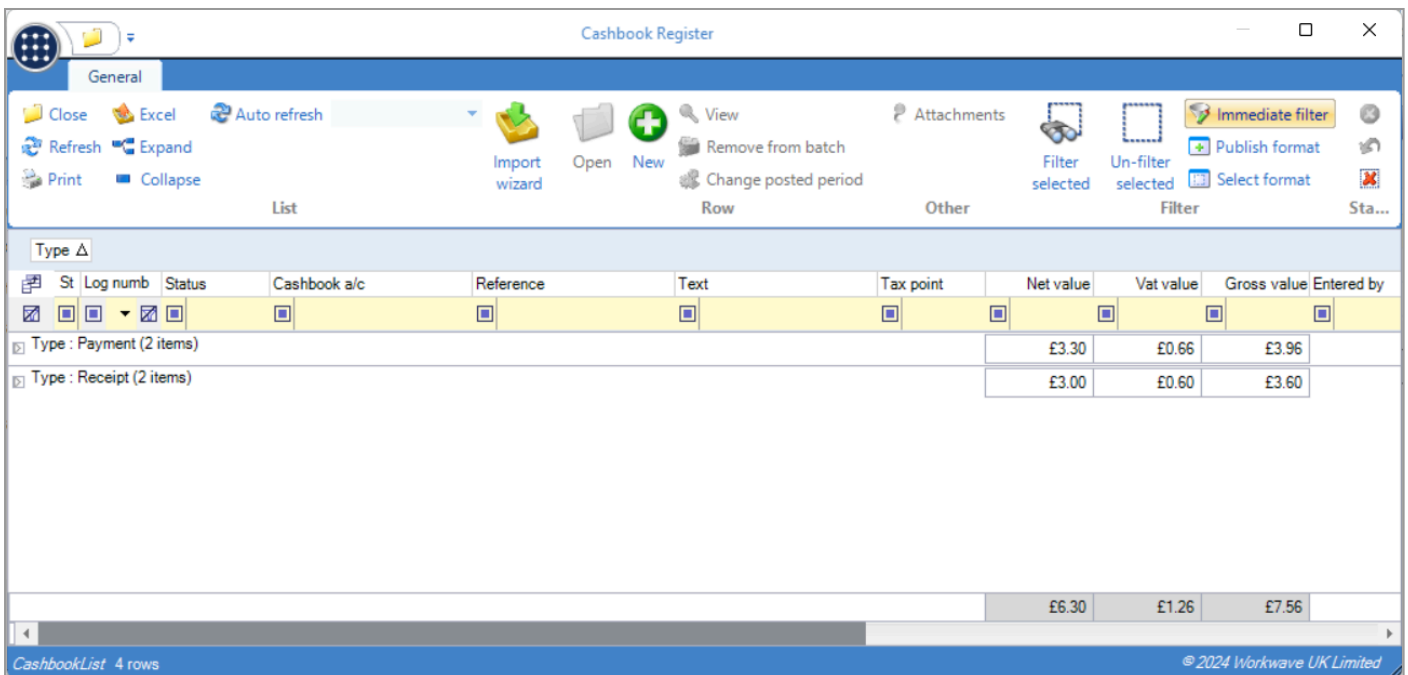
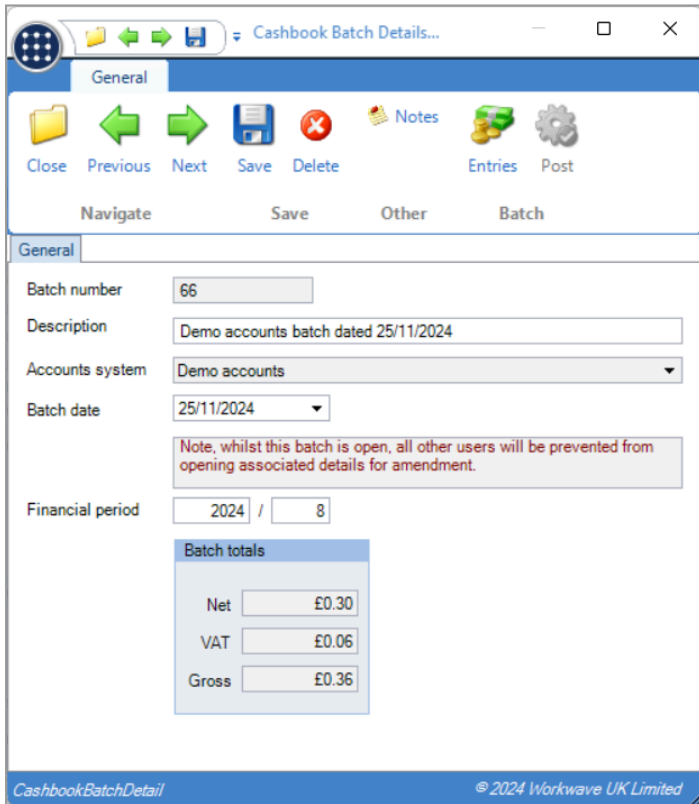
Any number of contact types can be set as a service request contact.

Service Requests

When a service request is assigned to a site, client, supplier or contract, the contact selection process now looks for the first contact assigned with a contact type set as Service request contact. If no such contact is found, the first contact is assigned as before.

CASHBOOK BATCH NET/VAT TOTALLING

The totals that are shown on cashbook batches and the cashbook batch list now sum the totals as payments less receipts, rather than a simple sum of the items.



BUDGET ROSTER VACANCY PROCESSING

Note: This modification is only relevant to Australian Awards Interpretation, though similar processes for vacancy handling have been in place for UK installations for a number of years.

Background

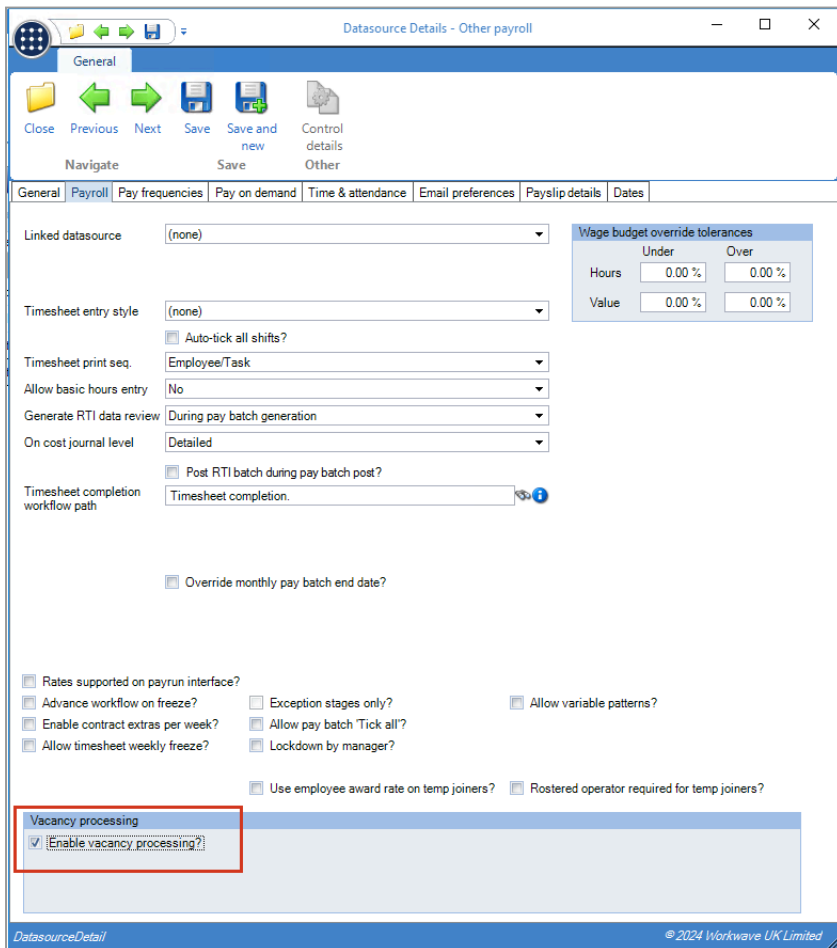
The Budget Roster of a contract defines the types of operatives required, and their working patterns. Employees are then assigned to these operatives, and it is these assigned employees that drive the build of Roster Manager in TemplaCMS, and the duties exported to Timegate.

Where the Contract Budget Roster has been defined but not all operatives have been assigned specific contracted employees, the duties relating to these operators have not previously been generated. As such it was not possible to fill these vacant duties either within TemplaCMS or Timegate, as they do not exist.

This update introduces a new process to allow these vacant duties to be exported via the definition of a specific Vacancy employee.

Datasource Details

A new checkbox has been added to payroll datasources.



Selecting this checkbox enables the new vacancy process for this payroll.

Employee Details

With the above checkbox selected, it is possible to create an employee with an account type of Vacancy.

The screenshot shows the 'Employee Detail - vacancy' window. The 'Personal details' section includes fields for Name (vacancy), Address, Suburb, State, Postcode, Sex (Male), Date of birth (not set), and Passport (not set). The 'Payroll' section includes Payrun (Cleaners Payroll-Two Weekly), Payroll number (7992), Pay frequency (Two Weekly), and NIC number. The 'Account type' dropdown menu is highlighted with a red box and set to 'Vacancy'. The 'Employee group' field is empty. A 'Mobile worker?' checkbox is also present.

Note that it is only necessary to create a single vacancy employee for each payroll datasource, and the vacancy employee does not need to be assigned to any contracts. This employee simply needs to exist to allow the Roster Manager and Timegate duty export to build the vacant duties.

Roster Manager

Where a vacancy employee exists and the contract budget roster has unassigned operatives, the Roster Manager now shows these duties under the vacancy employee, automatically marked as absent. It is therefore possible to assign employees to cover these duties.

The screenshot shows the Roster Manager interface with a toolbar containing various icons for navigation and management. The main area displays a roster for 'PARK - Park Pharmacy' with columns for days from Tuesday 07/Jan to Tuesday 14/Jan. The rows list different duty assignments, including vacancies and a cleaner's duties.

	Tue 07/Jan	Wed 08/Jan	Thu 09/Jan	Fri 10/Jan	Sat 11/Jan	Sun 12/Jan	Mon 13/Jan	Tue 14/Jan
PARK - Park Pharmacy	4 (9.5)	4 (9.5)	4 (9.5)	4 (9.5)			4 (9.5)	4 (9.5)
**7992 - vacancy : - Full Time Grade 1	06:00-10:00	06:00-10:00	06:00-10:00	06:00-10:00			06:00-10:00	06:00-10:00
**7992 - vacancy : - Full Time Grade 1	08:00-10:00	08:00-10:00	08:00-10:00	08:00-10:00			08:00-10:00	08:00-10:00
**7992 - vacancy : - Full Time Grade 1	15:00-18:30	15:00-18:30	15:00-18:30	15:00-18:30			15:00-18:30	15:00-18:30
HG0031 - forename surname : CLEANER - P	07:00-11:00	07:00-11:00	07:00-11:00	07:00-11:00			07:00-11:00	07:00-11:00

Timegate Duty Export

For a site linked to Timegate, and where the "Roster management in Timegate" option is selected on the Timegate external system definition, the export of duties to Timegate now include these as open duties, thus allowing them to be filled within Timegate.

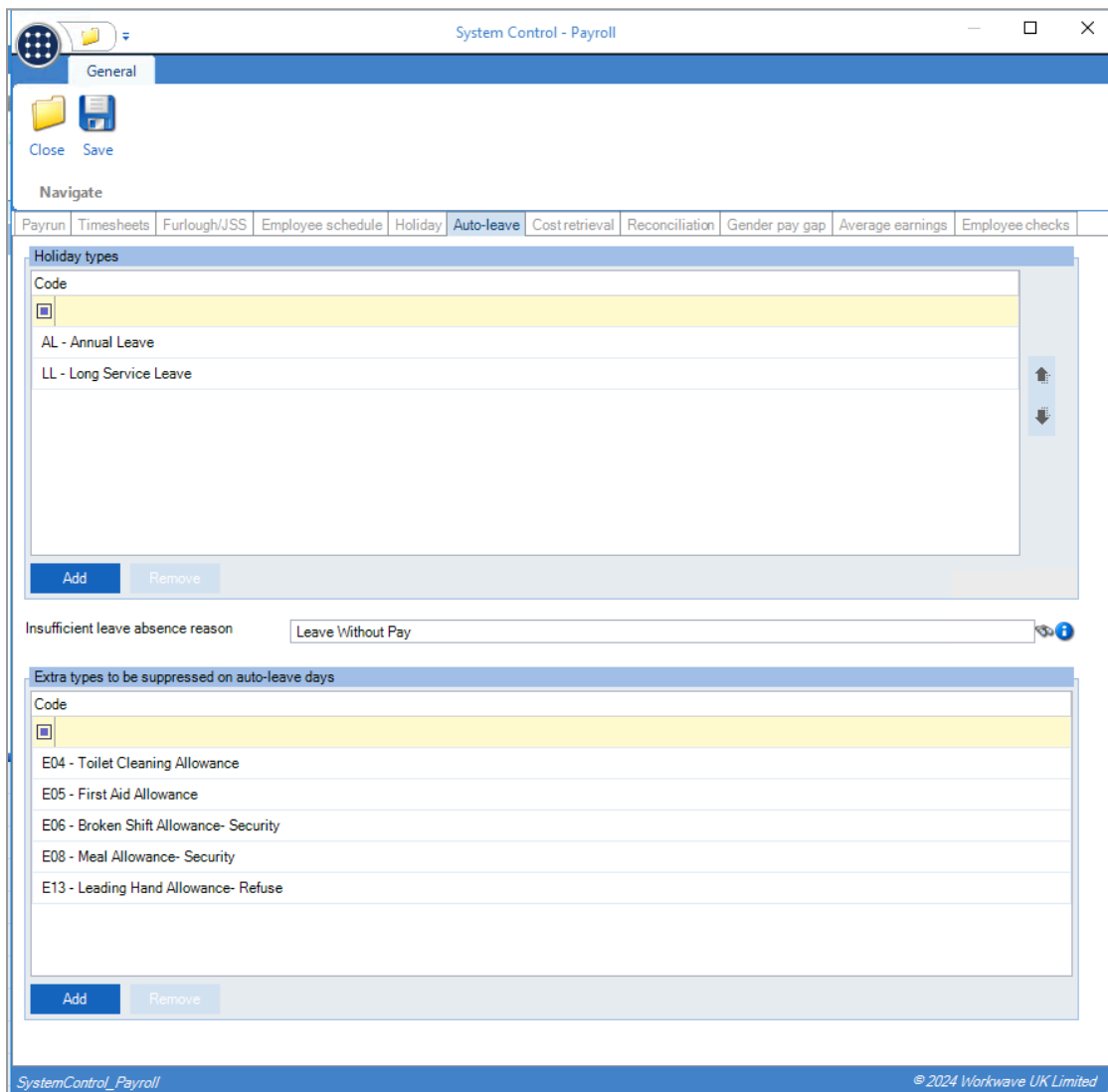
AUTOMATED LEAVE

Background

A new feature has been added to allow the definition of calendar periods where a site is closed and employees assigned to that site will be forced to take leave (or absence) during those periods.

System Control – Payroll

A new Auto-leave tab has been added to the Payroll section in System Control.



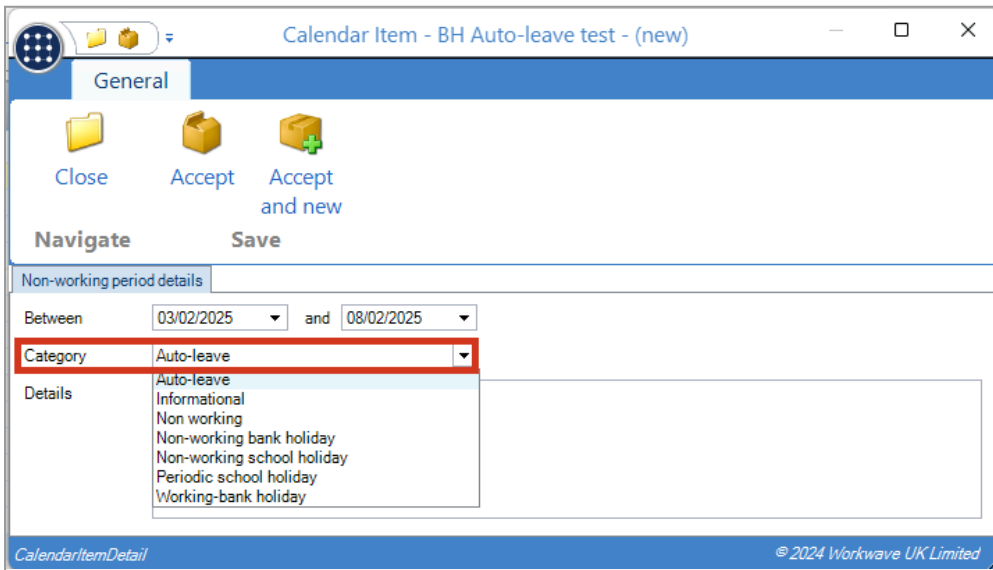
To enable auto-leave processing, one or more holiday types need to be selected. If a user does not select any holiday types, then auto-leave dates can still be defined, but they behave no differently to informational calendar entries.

The Holiday Types grid is used to specify the sequence of holiday types to be applied by auto-leave processing, with the absence reason being used when an employee has insufficient leave.

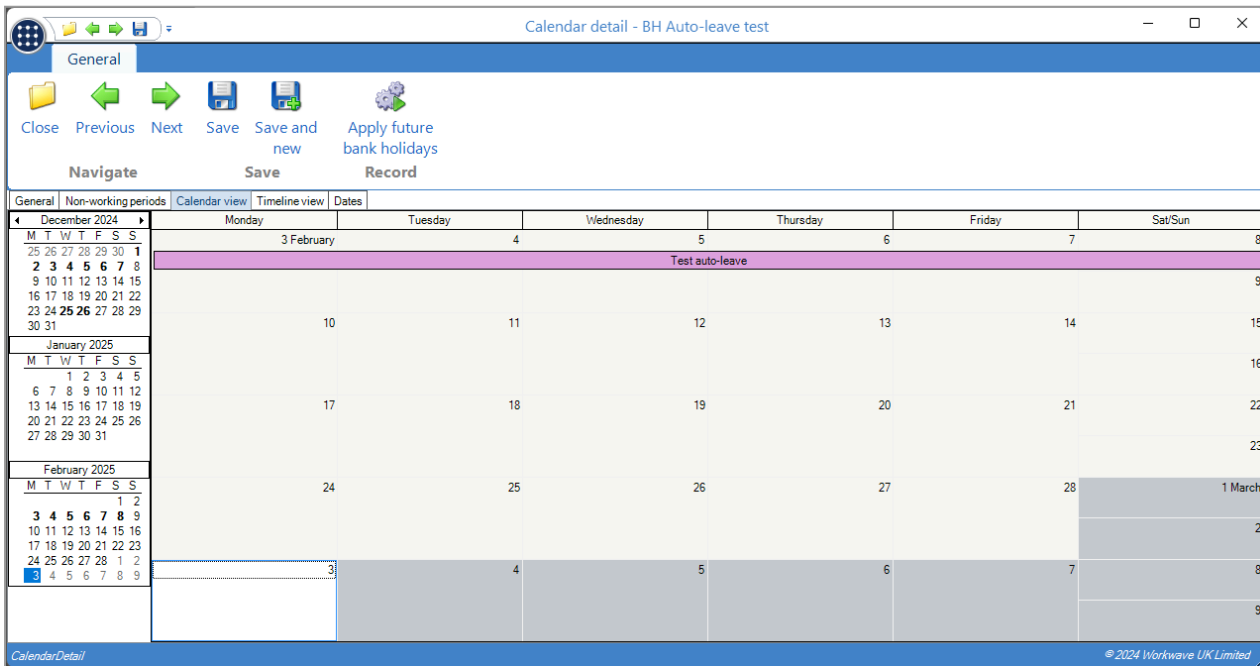
The Extra Types grid is used to specify which contracted extra types should have their quantities reduced based on the number of auto leave dates in a pay period.

Calendars

A new calendar category of Auto-leave has been added. This can be selected on Site Calendar Items and can be defined for a date range.



In the calendar view, auto-leave entries are colored purple:

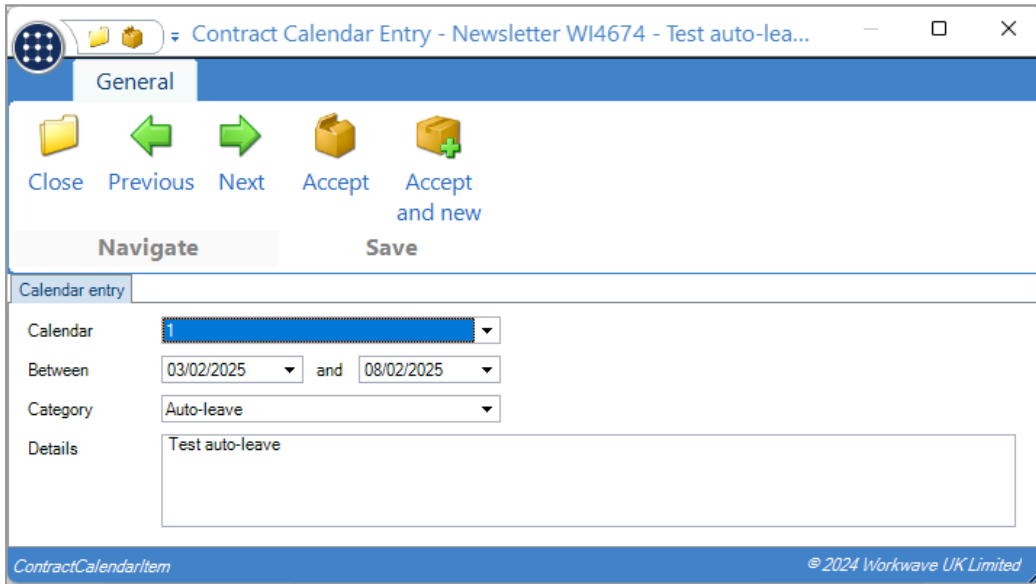


Note that unlike future public holidays defined in the calendar, future auto-leave dates do not require the employee to take holiday (as it may be absent if there is not enough holiday). As such, these dates are not considered part of the employee's committed leave when showing holiday summary information in TemplaCMS or the Employee Portal.

On the calendar list, there are also new columns for Auto-leave day count and Auto-leave week count, which are visible when the year start date is defined.

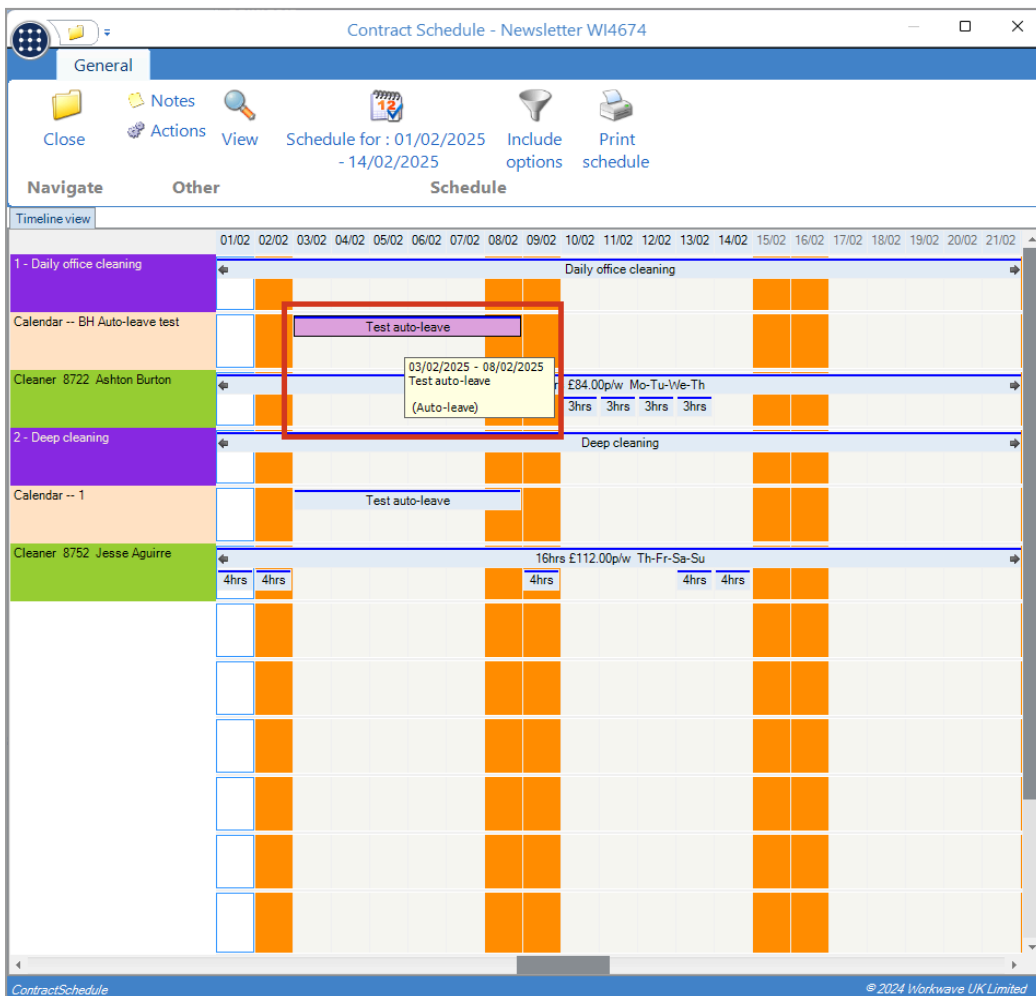
Contract Calendars

The new Auto-leave category can also be selected when maintaining contract task specific calendars.



Contract Schedule

The new Auto-leave category can be seen and is colored purple when selected, with appropriate hover text.



Timesheet Generation

When generating a pay batch, if a calendar entry of auto-leave exists for a date and the employee does not yet have any adjustments (applied from the staff planner, for example) for the date, then the system applies auto-leave.

This process adds holiday adjustments using the sequence as defined on system control. If the employee does not have enough entitlement for the holiday type (based on the payroll datasource or system level holiday resolve setting, and the holiday type specific overuse option), then the next type is used until a holiday type can be assigned. In the event of an employee not having enough holiday entitlement for any of the defined holiday types, then an absence adjustment is applied instead, using the absence reason defined on system control. Note that this process could result in split adjustments.

As timesheets are generated one at a time, if an employee is on two sites and both sites have auto-leave dates, the leave is applied on the first site, then the second. So it could be that all leave is used on the first site, and the employee is set to absent on the second.

The auto-leave adjustments appear on timesheets and roster manager as regular timesheet adjustments and are added to as staff plan events as normal.

When building the contracted extras, if these are on the list of extras to be suppressed during auto-leave (see system control) then the quantity of each extra is reduced by the number of auto-leave days where the employee was contracted to work. For example, a contract employee has an extra with quantity 20 for the pay period and there are 5 auto-leave days, of which the employee is contracted to work four days. In this case, the quantity on the extra is reduced to 16.

Timesheet Fixup

Timesheet fixup, whether in batch, or online from Roster Manager, recalculates the contracted extras and applies any newly added auto-leave dates where an employee does not have any existing adjustments. It does not reapply auto-leave that had been applied but where the adjustment was removed by a user. Equally, it does not remove auto-leave adjustments that have been previously applied in the case of auto-leave being removed from the calendar.

T&A Shift Export

During the export of duties to Timegate, if there is a roster that is attached to a contract that has a calendar with any “non-working auto leave” category dates, these hours are not sent out to Timegate and therefore no open duties are created as is currently created when a manual holiday/absence is entered.

Roster Manager

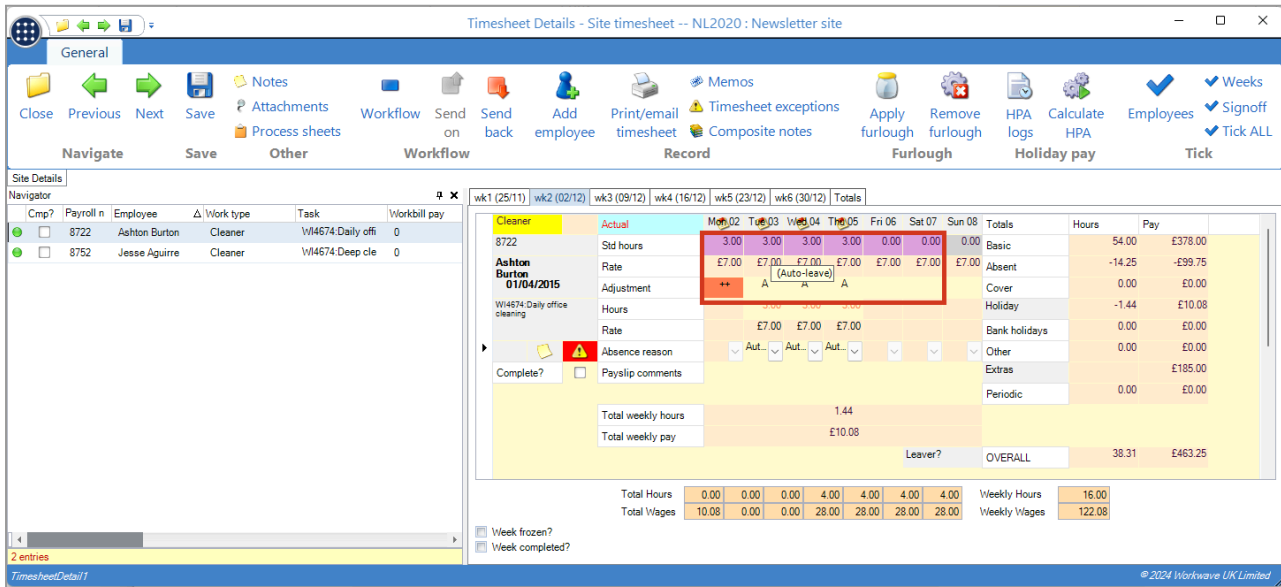
In the Roster Manager, auto-leave dates are colored purple, with appropriate hover text.

The screenshot shows the Roster Manager application window. The main area displays a roster grid with columns for days of the week (Mon 16/Dec to Sun 22/Dec) and rows for different sites and employees. The grid shows hours worked, with some cells containing '0 (4)' and others containing '4'. A red box highlights a row for '8752 - Jesse Aguirre : Cleaner' where the Thursday 19/Dec cell is purple and contains '4' and 'auto-leave'. Below the roster grid, there is a section for 'ucEmployees' with a table of authorized employees.

Payroll number	Name	Post code
200000	Karren Balsshoi	
**8060	Mr Gary Tapsell II	53120

Timesheets

In Timesheets details, Auto-leave dates are colored purple, with appropriate hover text. This applies to all timesheet entry styles that show individual dates. For example:



Timesheet Print and Excel

Auto-leave dates are denoted by the text “AL” and are colored purple in all timesheet documents that show individual dates:

TemplaCMS DEV
Payrun: Demo payroll.-Monthly 2020 run 06 (01/12/2024 to 31/12/2024)
Site: NL2020 - Newsletter site
Region: France >> Ops Mgr: NA >> Contract Mgr: NA >> Area Mgr: NA >> Client contract: NA >> Internal:

	Week 1							Week 2							Week 3									
	Mon 25	Tue 26	Wed 27	Thu 28	Fri 29	Sat 30	Sun 01	Mon 02	Tue 03	Wed 04	Thu 05	Fri 06	Sat 07	Sun 08	Mon 09	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18
Employee 8722 Burton, Ashton																								
Task W14674 - Daily office cleaning																								
Work type Cleaner																								
Std hours							AL	AL	AL	AL	AL	AL												
Rate:							7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
Adjustment								A	A	A														
Hours								3	3	3														
Rate								7	7	7														
Absence reason	IAL IAL IAL																							

LOG NUMBERS

This enhancement update contains the following log numbers:

WI3920

WI4377

WI4529

WI4540

WI4550

WI4674

WI4695

WI4732



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.