TEAM Software by WORKWAVE

TemplaCMS Newsletter

V6.1.0 | Update 2024.01 | January 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 Data Forms

NOTE: For customers licensed for both advanced forms and employee portal.

Please contact the implementation team for assistance with configuration, if there is an open passport to complete the work under, or account management if a passport is required.

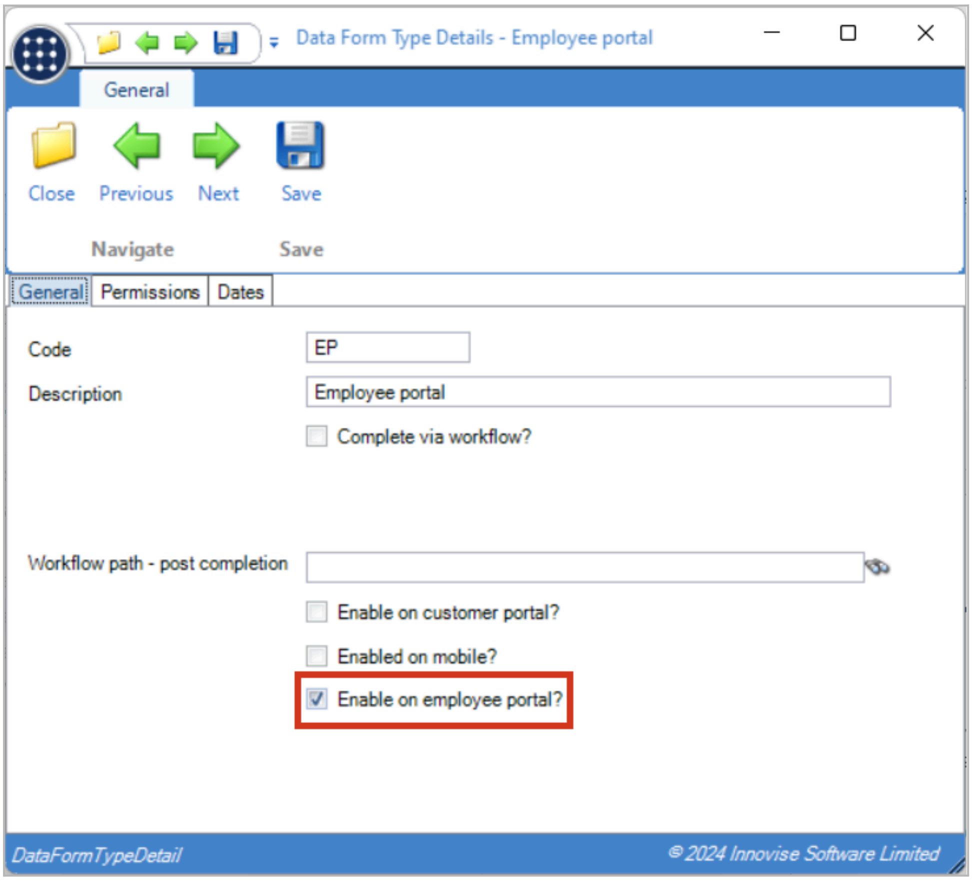
Background

It is now possible to define data forms to be completed by employees using the employee portal. The content below covers these modifications for suitability licensed customers.

Data Form Types

A new *Enable on employee portal?* option has been added to Data form types (Service Point > Customer Service > Maintenance > Data forms).

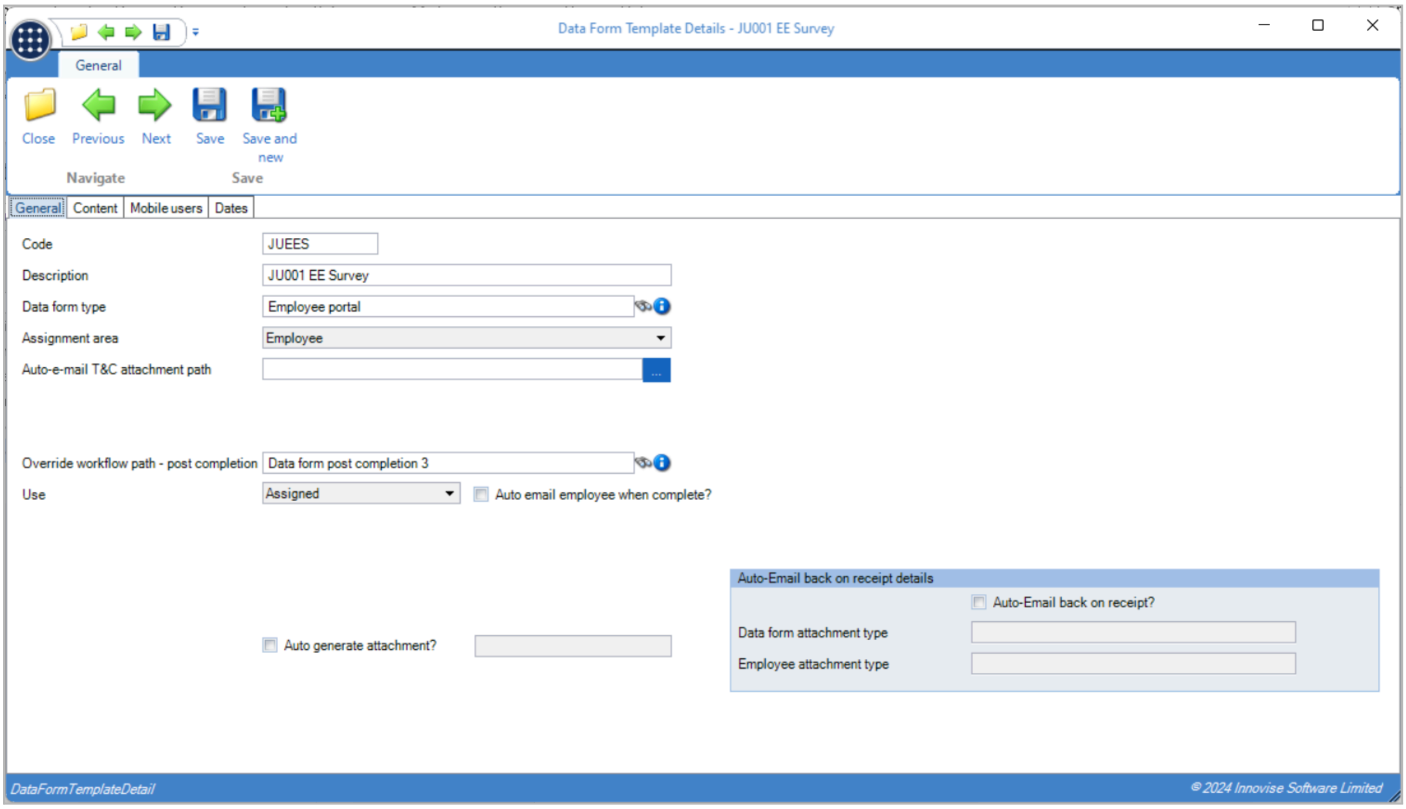
Note: This option cannot be used in conjunction with *Complete via workflow?*, *Enable on customer portal?*, and *Enabled on mobile?*.



Data Form Templates

When a data form type flagged as *Enable on employee portal?* is selected for use on a data form template, it is now possible to define a template for employee completion on employee portal. Selecting such a data form type automatically sets the template to be used for employees only. All other controls that are unrelated to employee portal completion are also removed.

Note that the free form designer cannot be used with data form templates for the employee portal, as the portal uses adaptive scaling to handle screen sizes from desktop to mobile phone, meaning that controls must be laid out in a more consistent format.



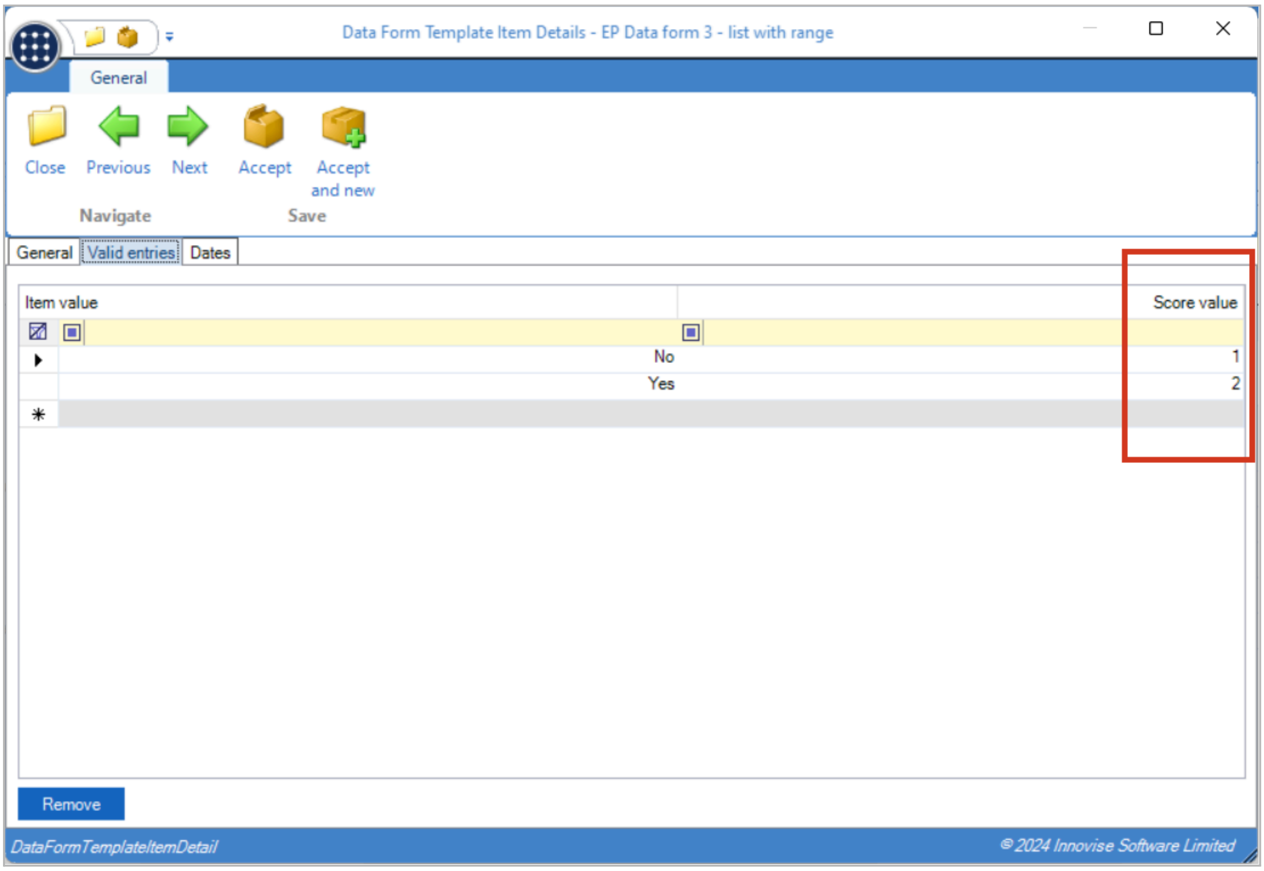
When entering template items, entry allows a line text to be entered along with the data type, being one of:

- Check box
- Date and time
- Image
- Label
- List
- Logo
- Multiline text
- Numeric (0dp – 4dp)
- Section heading
- Signature box
- Text
- URL

Items can be flagged as mandatory where data entry is required.

When a section heading is added to the template a new *Manager completion section?* option is available, identifying the section and any controls within as requiring entry by a TemplaCMS user after completion by the employee. Both the section and any such controls are hidden from the completing user on the employee portal. Additionally, the entry of condition formulae is not enabled on Section headings.

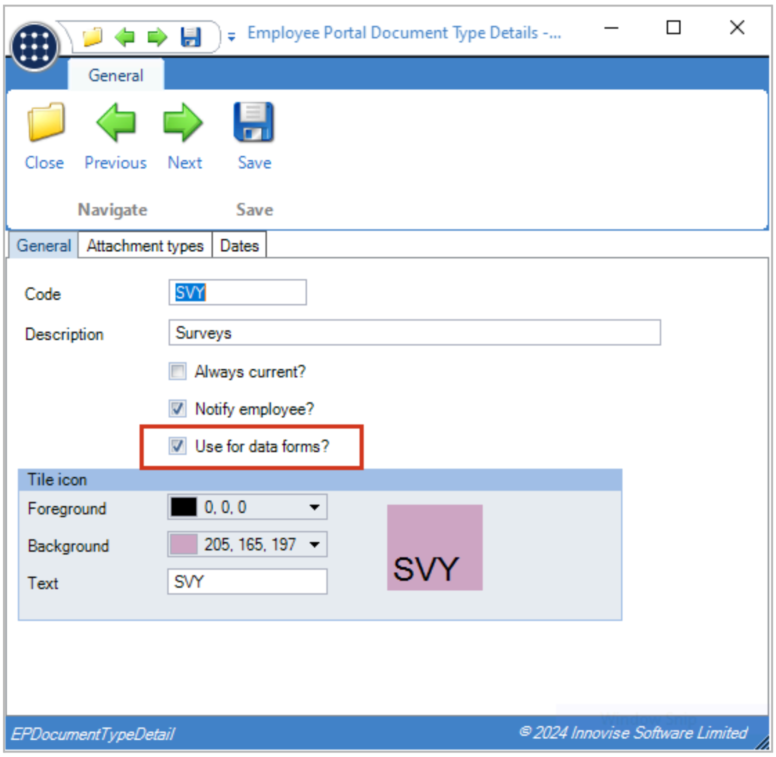
The Valid entries grid on List template items has been extended with a new Score value column allowing the entry of a value against each answer. Using this it is possible to route data forms in post-completion workflow as described in the Workflow section below.



When mapped to the employee portal, the template item line text will become the left column of data form entry, with the right column being the control which allows data entry. As such, a label will therefore render within the left column with no control in the right, whilst a section heading will render across both columns.

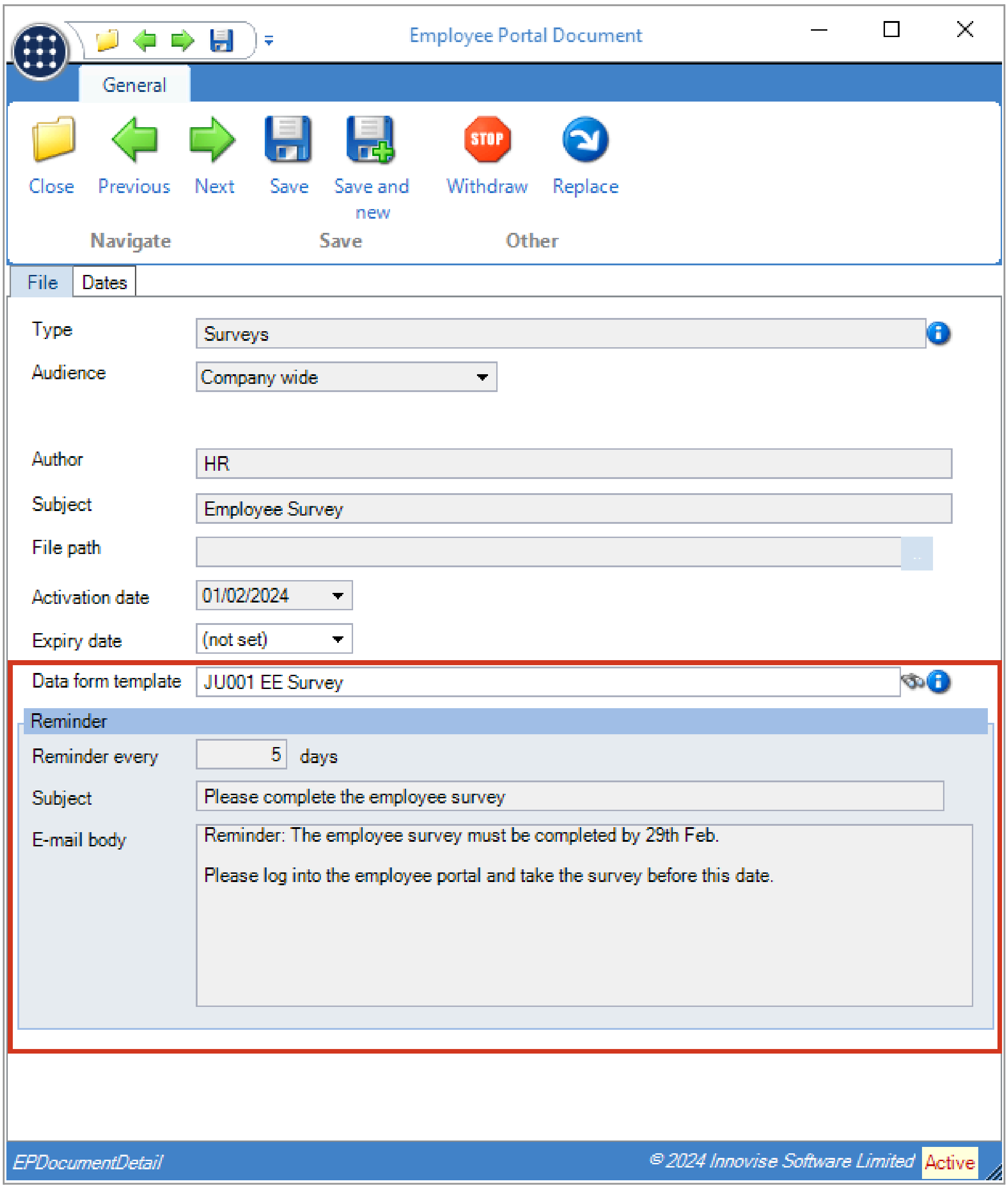
Employee Portal Document Types

A new option has been added to Employee portal document types (Service Point > Customer Service > Employee Portal > Maintenance) for *Use for data forms?*.



Employee Portal Documents

When selecting an document type Service Point > Customer Service > Employee Portal) flagged as *Use for data forms*, the user must now select a data form template, rather than a file path, along with optional reminder details:



Where reminder details exist, a new nightly batch job determines which employee portal data forms have not been completed and emails a reminder to relevant employees.

Employee Portal Document Activation

When an employee portal document is activated with a data form template assigned, a copy of the data form template is made so any subsequent changes to the data form template do not impact the document. The EP document is then sent to the employee portal as per normal, along with the additional data form details.

As each data form is assigned to the correct employees based on the defined audience, a data form within TemplaCMS is also generated for each employee and set to a status of “Pending completion”. When completed via employee portal, the data form will be completed with the employee details and sent for post-completion workflow (should a path exist).

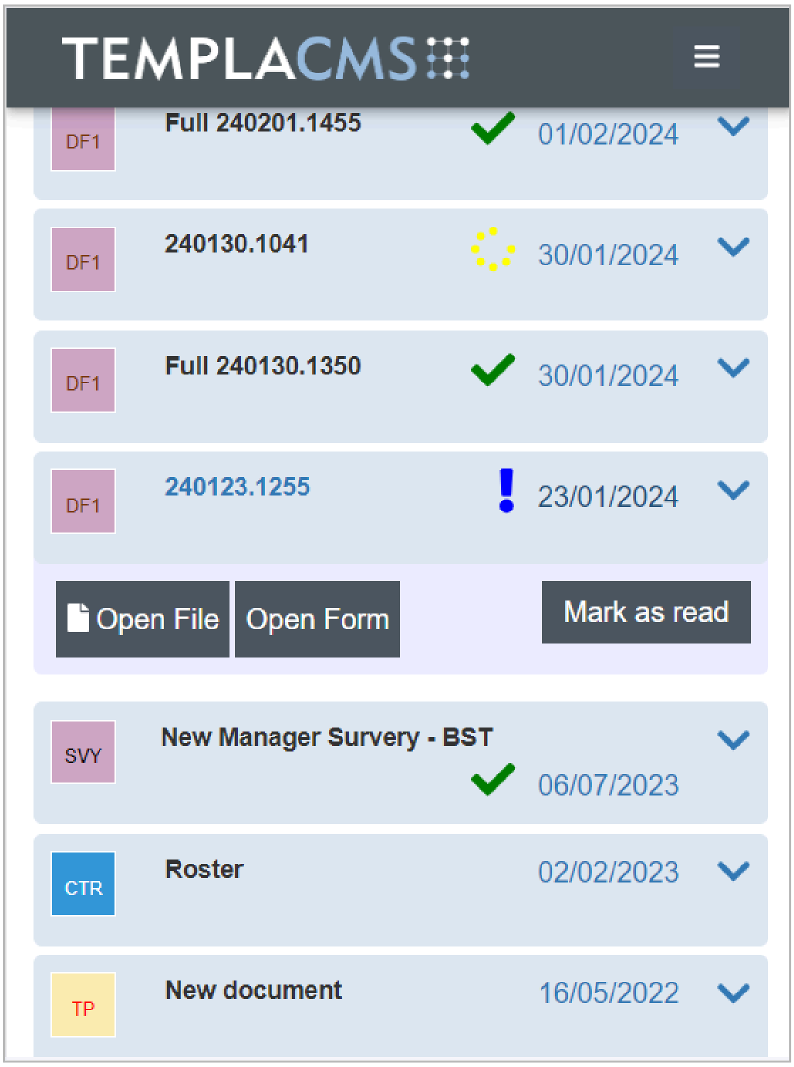
Employee Portal Document Withdrawal/Expiry

When an employee portal document is withdrawn or expired, any un-completed data forms which exist within TemplaCMS are now set to a status of Discarded. Any completed data forms remain unchanged.

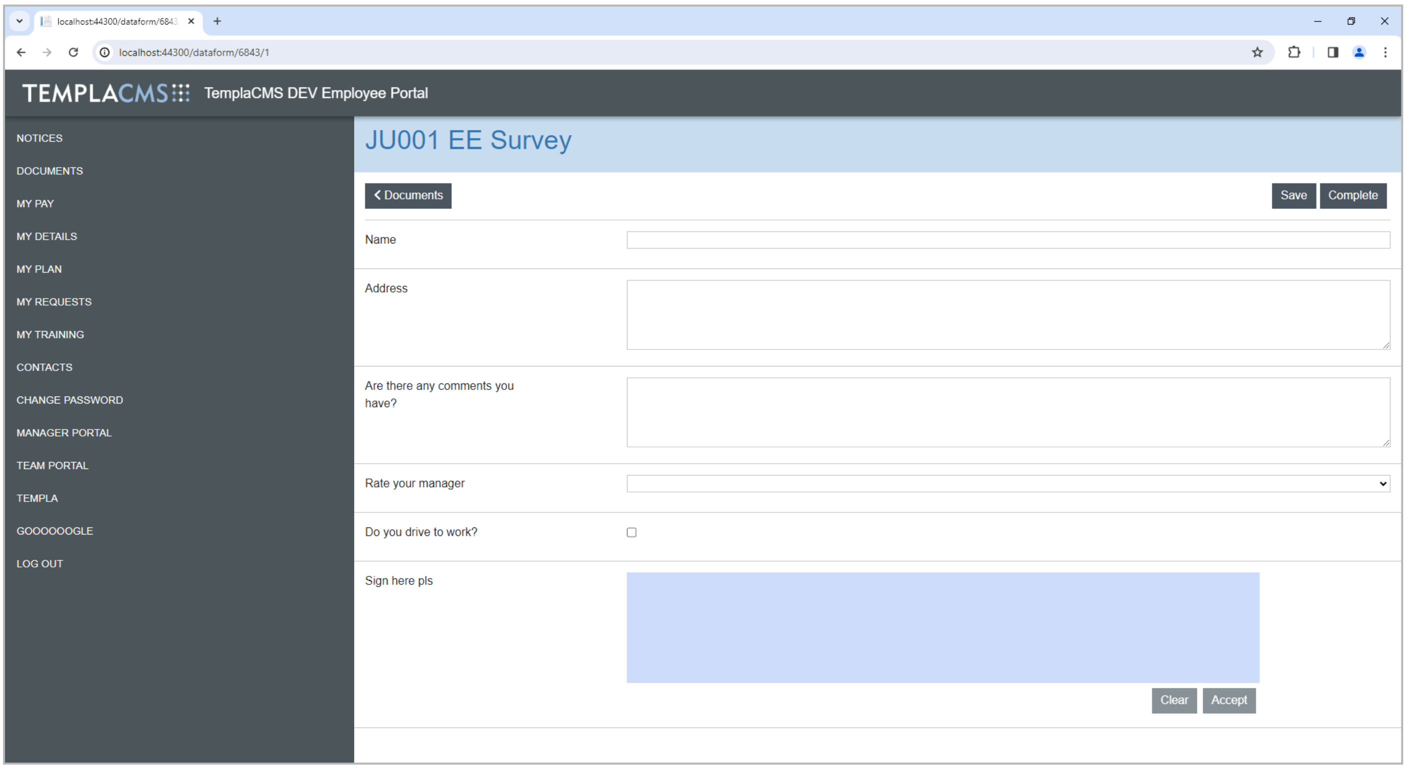
Employee Portal

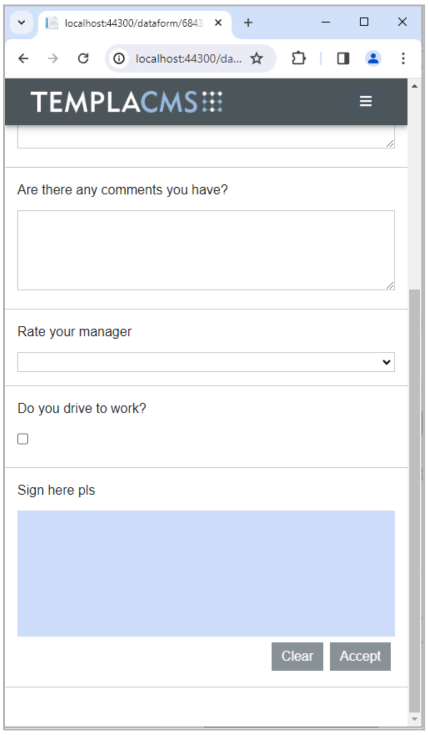
The documents list within the employee portal has been expanded to handle data forms. A new icon indicates any documents with a data form, showing:

- A blue exclamation mark where a data form exists which has not been started.
- A red exclamation mark where a data form exists which has not been started, but the form has been marked as read.
- A yellow pending symbol where a data form exists with saved, but not completed details.
- A green tick where a data form has been completed.



A new Open Form button within the data form takes the employee to the data form for completion. Here, the controls are laid out as per the designed form in two columns for data entry, though the rendering will automatically change when accessed on smaller screens:



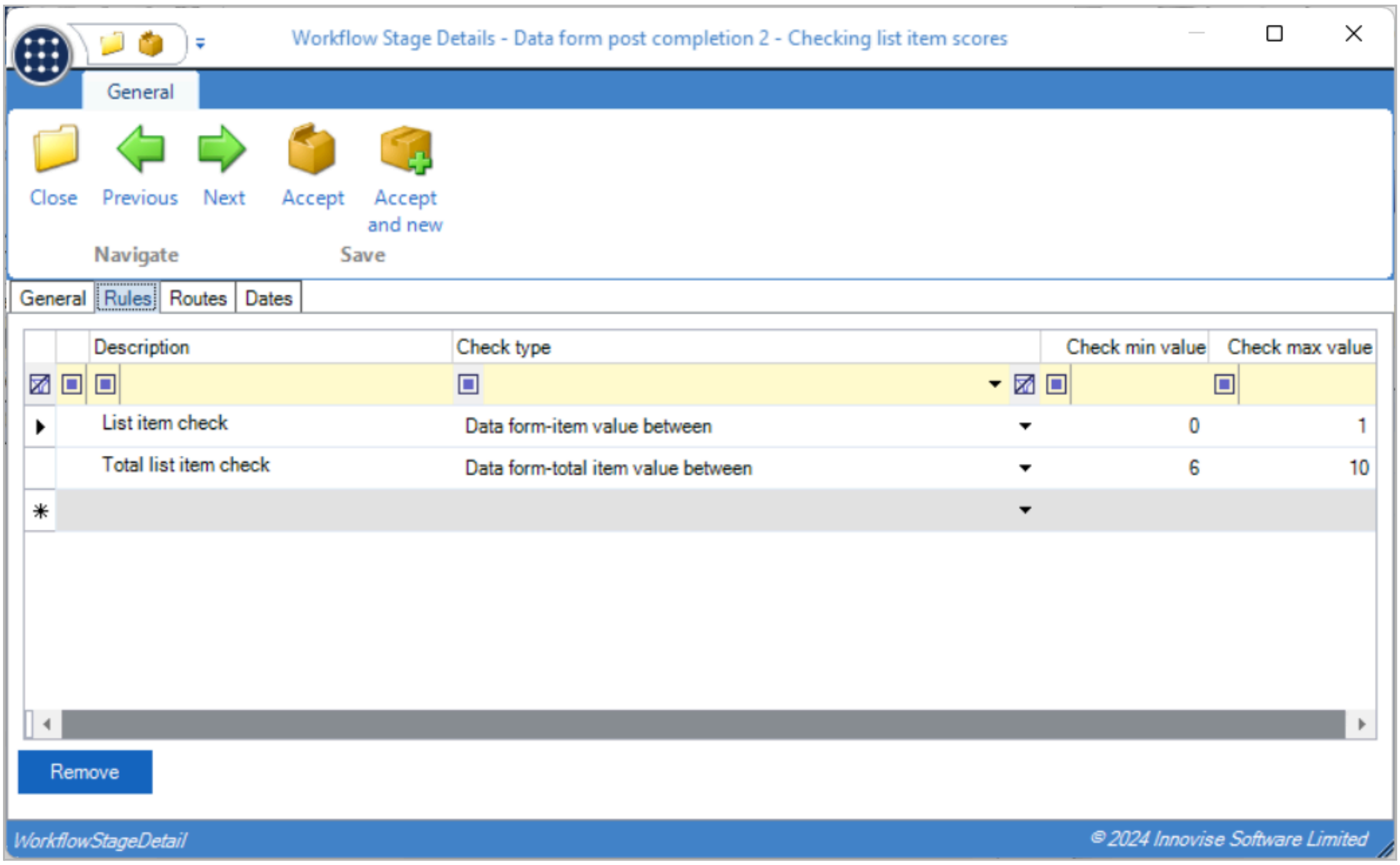


A form may be saved if no items are in error – i.e., outside of an allowed range.

A form may be marked as completed if no mandatory items are missing. Once completed, the data form may no longer be edited and is returned to TemplaCMS and put into the post-completion workflow (where set up).

Data Form Post-Completion Workflow

Two new workflow rule types are available on Data from post-completion workflow stages for *Data form-item value between* and *Data form-total item value between*, where check min value and check max values can be defined.



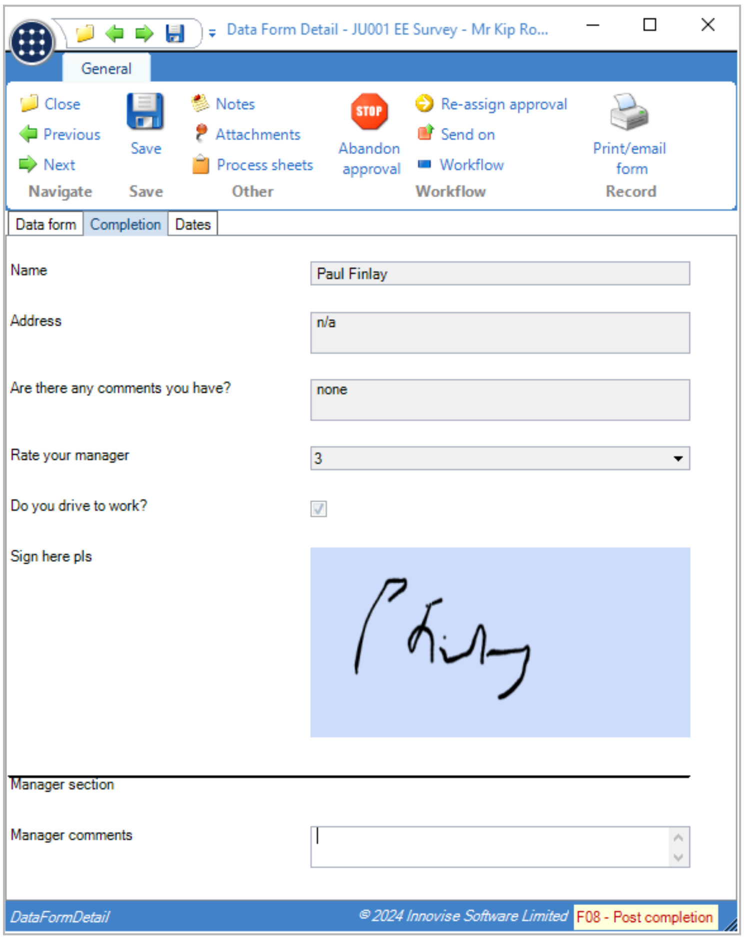
When a data form is completed and goes into post-completion workflow, the new rule type checks are considered as such:

- Data form-item value between – if any data form list item's value fits within the range.
- Data form-total item value between – it the sum of all data form list item's value fits within the range.

Additionally, routing has been extended to allow business analysis routing based on each employee's home site, i.e., the employee's earliest effective current site.

Data Forms

Whilst the data form template is set up without free form design, the data form that is generated when assigned to an employee is automatically laid out with a similar design to the employee portal data form in a free form style. This extends to printing of the document.



As can be seen from the above screenshot, such a dataform in post-completion workflow will allow the assigned user to both see and amend the controls within any defined manager completion section.

Pay Assist Payroll Export

NOTE: For non-Select Pay clients.

Background

TemplaCMS has been modified to export pay data in the format required by Pay Assist.

Datasources

To export in the format required for Pay Assist, a new Pay Assist export format option has been added to Payroll datasources with connection type of Other Payroll.

Payroll Export

For payrolls that are set to export to Pay Assist, the export will be to an Excel file in the appropriate format.

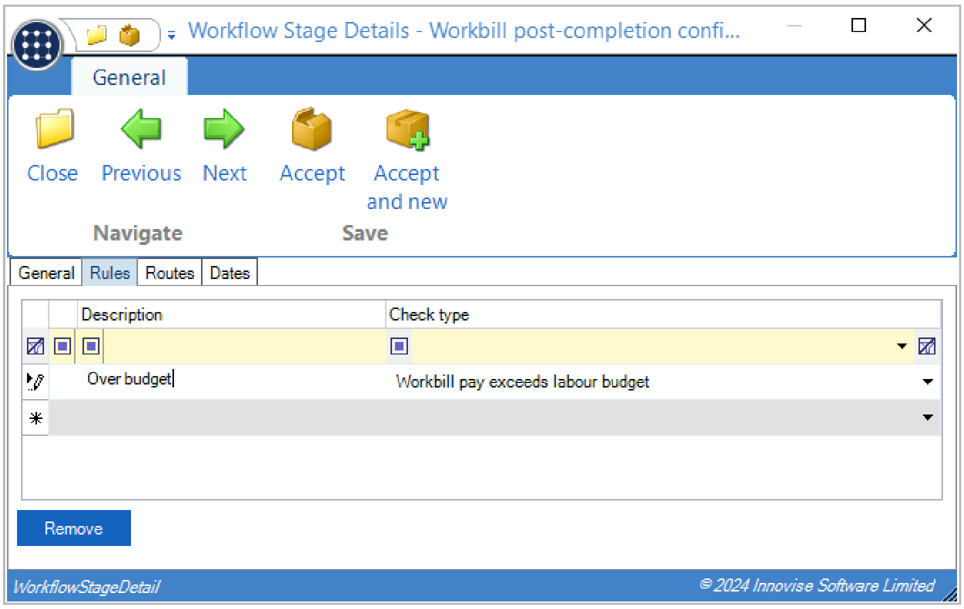
Workbill Post-Completion Workflow

Background

The option to perform labour budget checks on fully completed workbills has been added to TemplaCMS.

Workbill Post-Completion Workflow

A new Workbill post-completion confirmation workflow path type has been added, with a single rule check type of *Workbill pay exceeds labour budget*.



A maximum of one workflow path of this type is allowed.

Workbill Completion

When a workbill is flagged as fully complete, it will be sent into workflow on the Workbill post-completion confirmation workflow path (if one exists).

If the rule check fails, then the workbill will be routed to the nominated user to approve or revise the workbill employee pay.

Note that this check does not apply to Hygiene Service workbills.

Per Shift Roster Allowances

NOTE: This change is only applicable to installations licensed for Australian Awards Interpretation.

Background

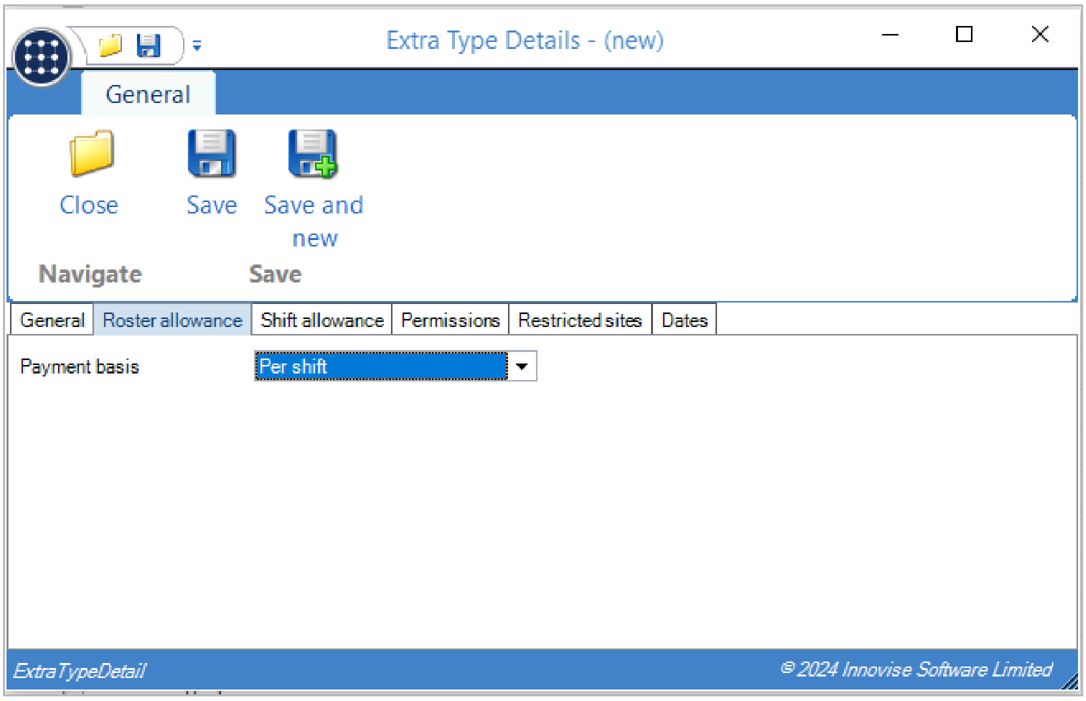
TemplaCMS has previously allowed the definition of Extra Types as being roster allowances that are applied on a per hour basis.

Each configured operator on a rostered contract budget roster could then be configured to apply these allowances, which are paid based on the number of hours of work performed.

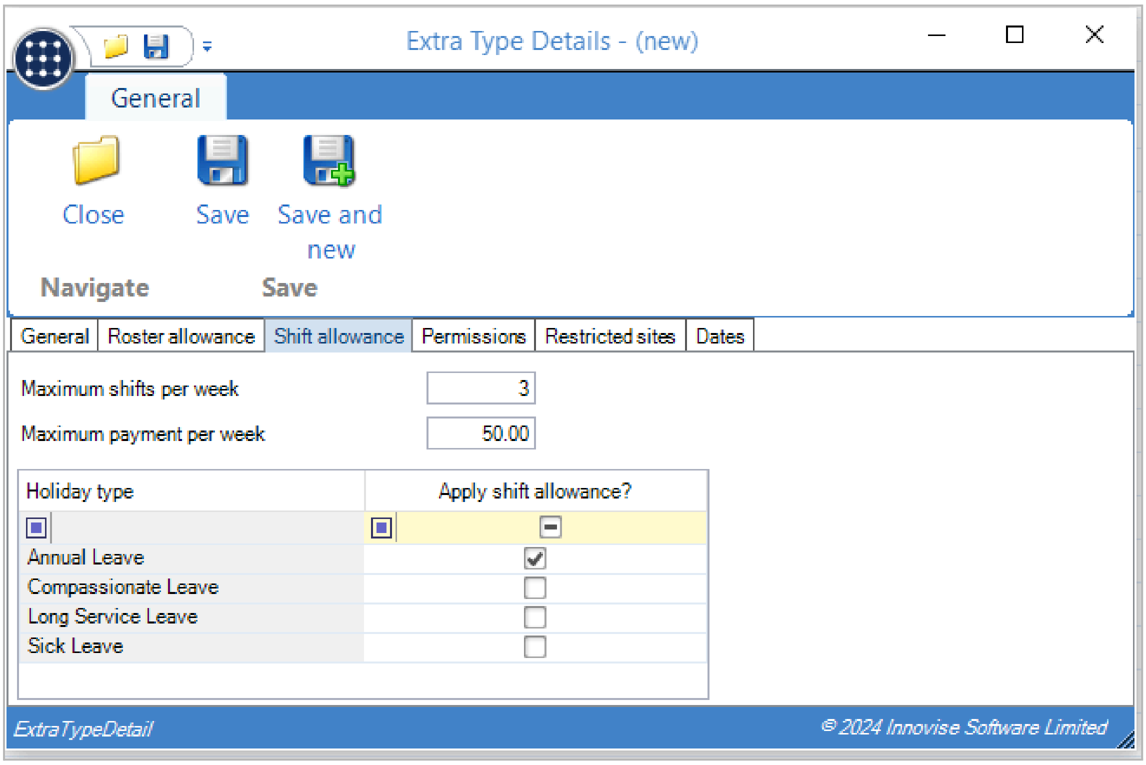
Roster allowance extra types can now additionally be defined to be applied on a per shift basis. These are then paid if the operator performs any work on a rostered shift. Per shift allowances can optionally be paid for selected holiday types, and it is possible to cap the value or number of such payments per week.

Extra Types

Extra Types now allow for the selection of a new payment basis:



If a roster allowance extra type is defined as *Per shift*, then the Tracked Pay Types grid is removed and a new Shift allowance tab is displayed.



The Shift allowance tab allows the definition of the Maximum shifts per week and the Maximum payment per week. If a maximum is not entered, then there is no limit.

The Holiday type grid allows discrete holiday types to be selected. Any holiday type selected will cause the allowance to be paid when holiday of that type is used in place of working a rostered shift.

Contract Budget Roster Operators

The extra types that apply to each operator are selected in the same way, irrespective of whether they are per hour or per shift.

Contract Budget Roster Awards Interpretation

The AI calculations for the contract budget roster are performed for a single week on each operator. This now includes both per hour and per shift allowances. If a per shift allowance has a weekly maximum defined, then the calculated allowances will be capped appropriately.

If an operator is rostered for two sessions in a day, then each session is treated separately, so may result in an allowance being paid.

Contract Budget Roster Comparison

This shows the results of the Awards Interpretation, so the Assigned and Budget Allowance values include both per hour and per shift allowances.

Timesheet Awards Interpretation

The Awards Interpretation process has been extended to include both the existing per hour allowances, and the new per shift allowances.

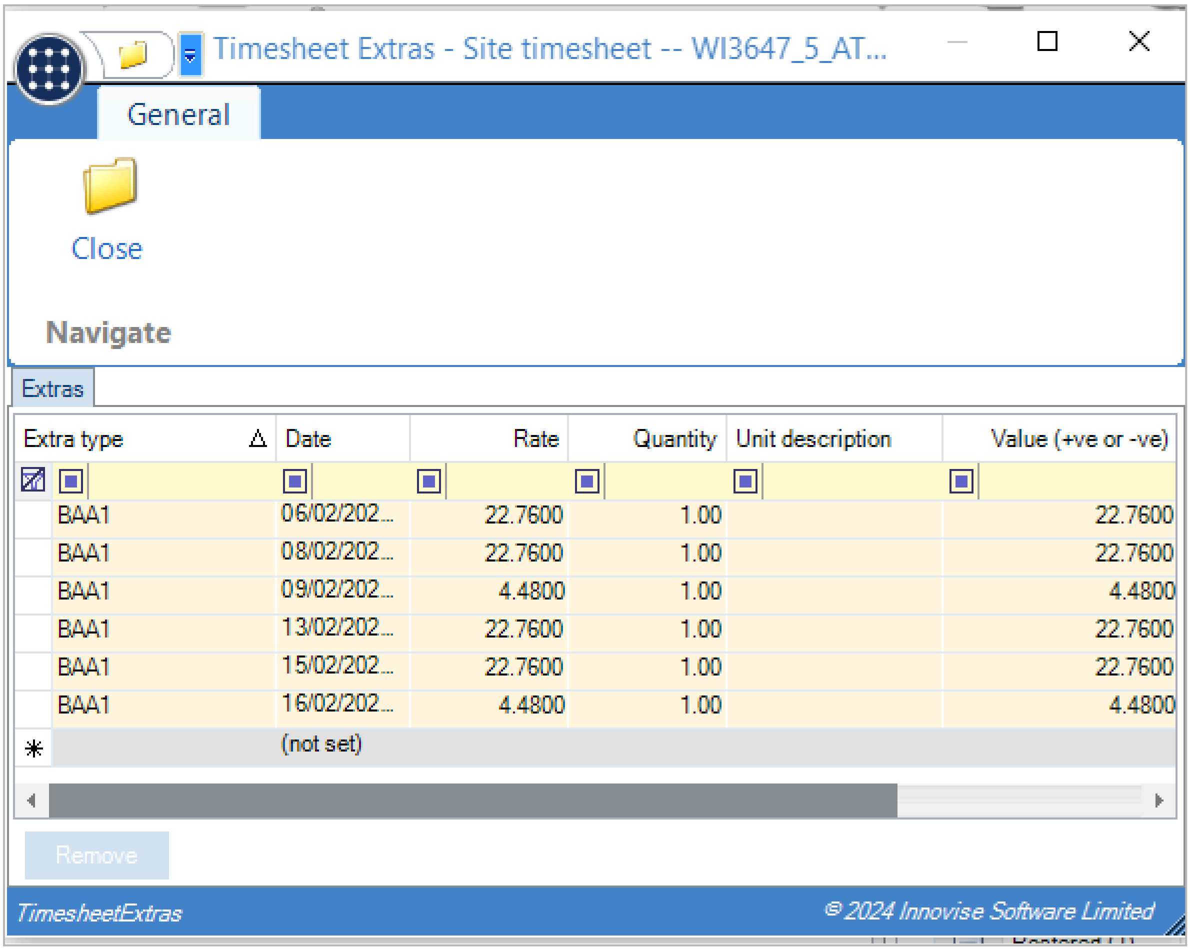
Where an employee is attached to an operator with per shift allowances, then the allowance will be payable if the employee performed any work for the rostered shift. If an employee does not work any part of a rostered shift, then the allowance will still be payable if the employee has any holiday for the missed shift that matches the holiday types defined on the extra type.

Note that it is the operator selected for the day on the timesheet that drives the attendance allowance and not the operator assigned to the employee via the contract.

For the weekly maximum threshold checks, weeks are based on day one being the first day of the pay run.

Timesheet Extras

Each per shift allowance payable will result in an appropriate timesheet extra, with quantity of 1. If the weekly maximum payments value is exceeded, then the final extra for the week could be for a lower value. For example, the weekly maximum here is $50.00:



Extra type	Date	Rate	Quantity	Unit description	Value (+ve or -ve)
BAA1	06/02/202...	22.7600	1.00		22.7600
BAA1	08/02/202...	22.7600	1.00		22.7600
BAA1	09/02/202...	4.4800	1.00		4.4800
BAA1	13/02/202...	22.7600	1.00		22.7600
BAA1	15/02/202...	22.7600	1.00		22.7600
BAA1	16/02/202...	4.4800	1.00		4.4800
	(not set)				

Timesheet Budget Roster Comparison

This shows the results of the Awards Interpretation, so the Actual, Assigned and Budget Allowance values all include both per hour and per shift allowances.

Dashboard Item Refresh

NOTE: For clients licensed for the Dashboard module.

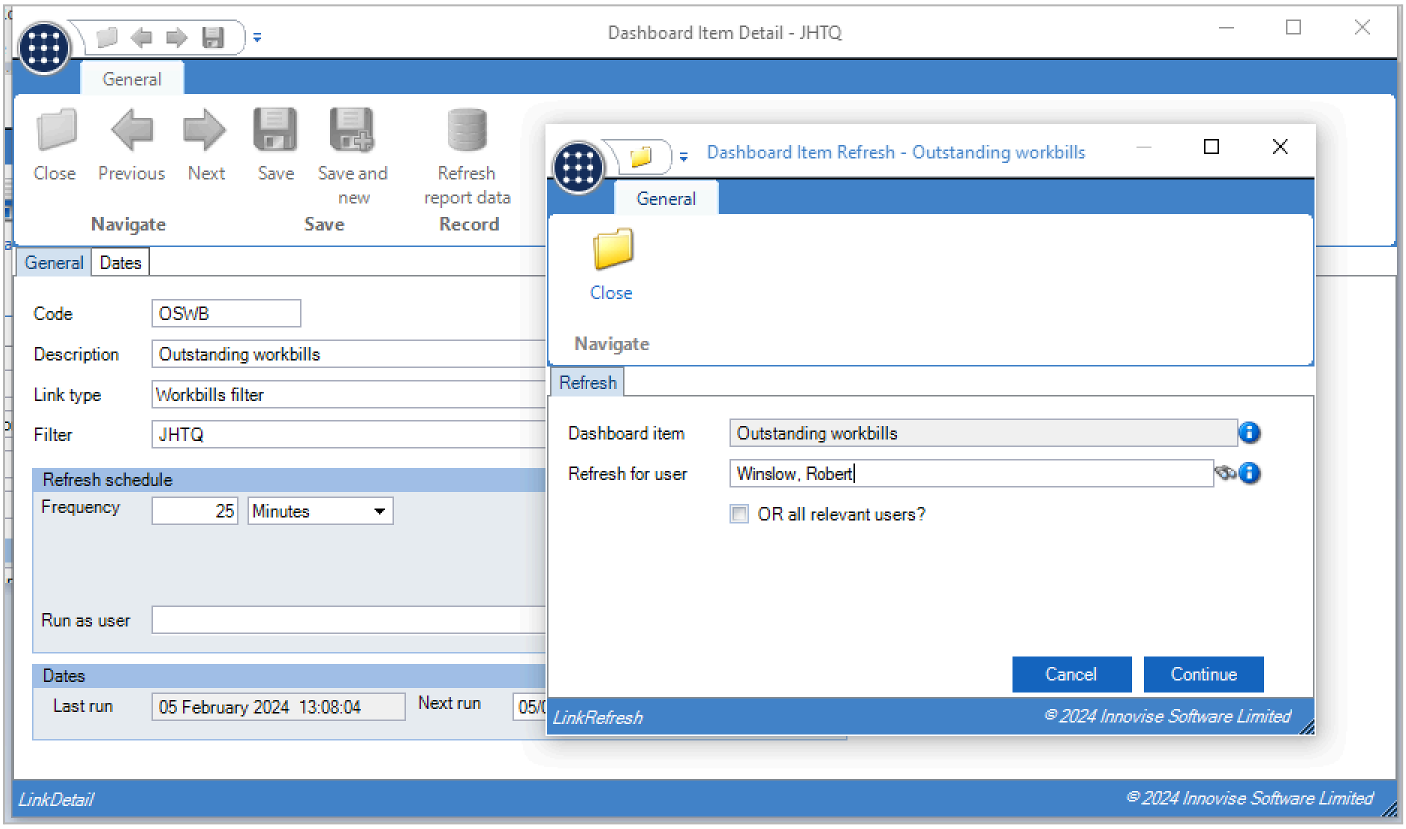
Background

TemplaCMS dashboards contain items linked to reports or filters, and the contents of these are automatically refreshed on a defined frequency. There are occasions, however, when a user requires to force a refresh immediately. This can be done for all items on a selected dashboard, or for individual dashboard items.

When an item refresh is requested TemplaCMS determines each distinct user that can see the item, and performs a refresh for each in turn. In this way the same item can yield different results for each user, as the refresh is performed under the authority context of each. This forced refresh is carried out on the requesting user's desktop, meaning they must wait for it to complete before they can continue with other work.

Dashboard Item Detail

When the Refresh report data toolbar button is clicked, a new confirmation window will now be displayed as below:

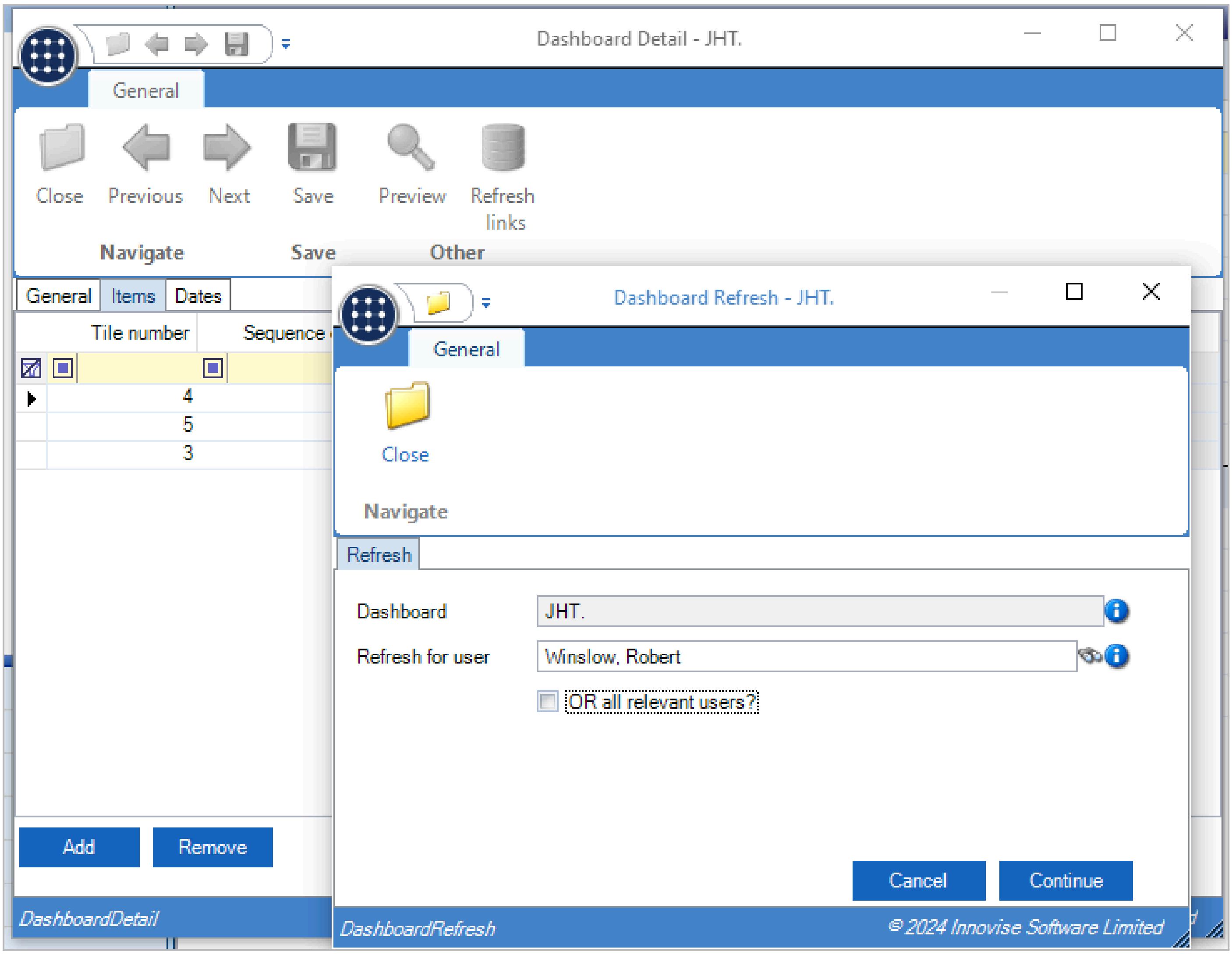


This will default to requesting a refresh for the current user, though this may be changed to another selected user, or requested for all relevant users. On continue, the refresh will now be sent as a background job to the batch processing queue.

Note that if the dashboard item has a specific "Run as user" defined, then the refresh can only be performed for this user, with no ability to request another.

Dashboard Detail

Similar to the above, when the Refresh links toolbar button is pressed, a new confirmation window will now be displayed as below:



This will default to requesting a refresh for the current user, though this may be changed to another selected user, or requested for all relevant users. On continue, the refresh will now be sent as a background job to the batch processing queue.

Log Numbers

This enhancement update contains the following log numbers:

WI3713

WI3735

WI3759

WI3647

WI3676

TEAM Software

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