TemplaCMS Newsletter

V6.1.0 | Update 2025.02 | February 2025

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.

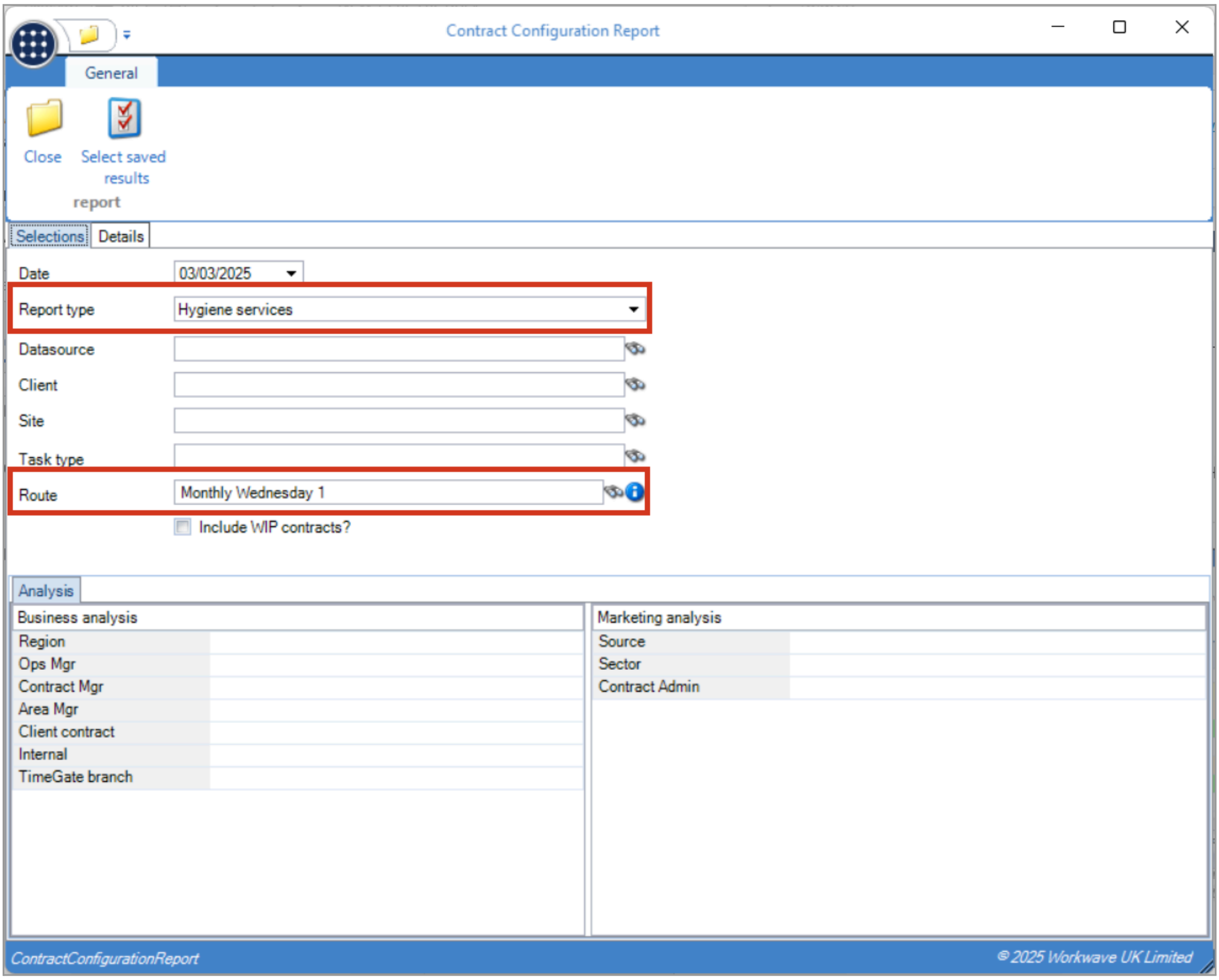
Contract Configuration Report – Hygiene Services

Background

A new report type has been added to the contract configuration report for appropriately licensed environments for hygiene services.

Contract Configuration Report

When licensed for hygiene services, a new report type option of Hygiene services is available on the contract configuration report. A route can also be optionally selected for filtering.



When run, all contract hygiene services matching the entered selection criteria are then shown, along with the billing information and any details that exist on the service. As multiple detail lines may exist on a service, the service details may appear multiple times in the report with different information from the detail line on each report row. The ability to include or exclude the billing and detail columns is also available when run for Hygiene services.

Note: The route shown on the report is the first hygiene service route defined on the detail line. This route is also the route used in filtering based on the selection criteria.

Hygiene Service Run

Background

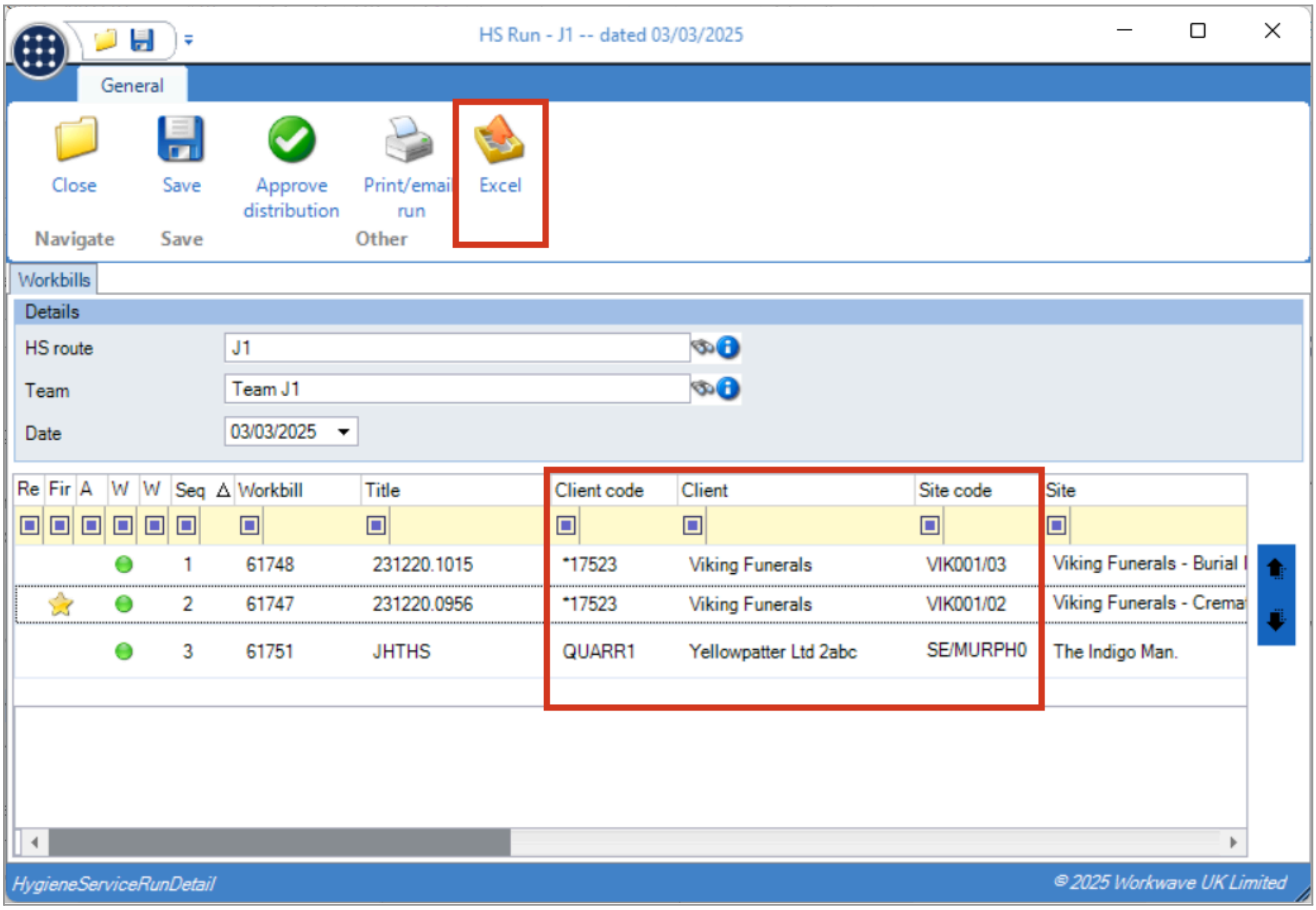
Improvements have been made to the useability of hygiene service run details view, adding further columns and allowing export of the grid to Excel.

Hygiene Service Runs

The details grid on hygiene service runs has been extended with new columns for:

- Site code
- Client code
- Client description

In addition, a new taskbar option allows the export of the workbills grid contents to Excel.



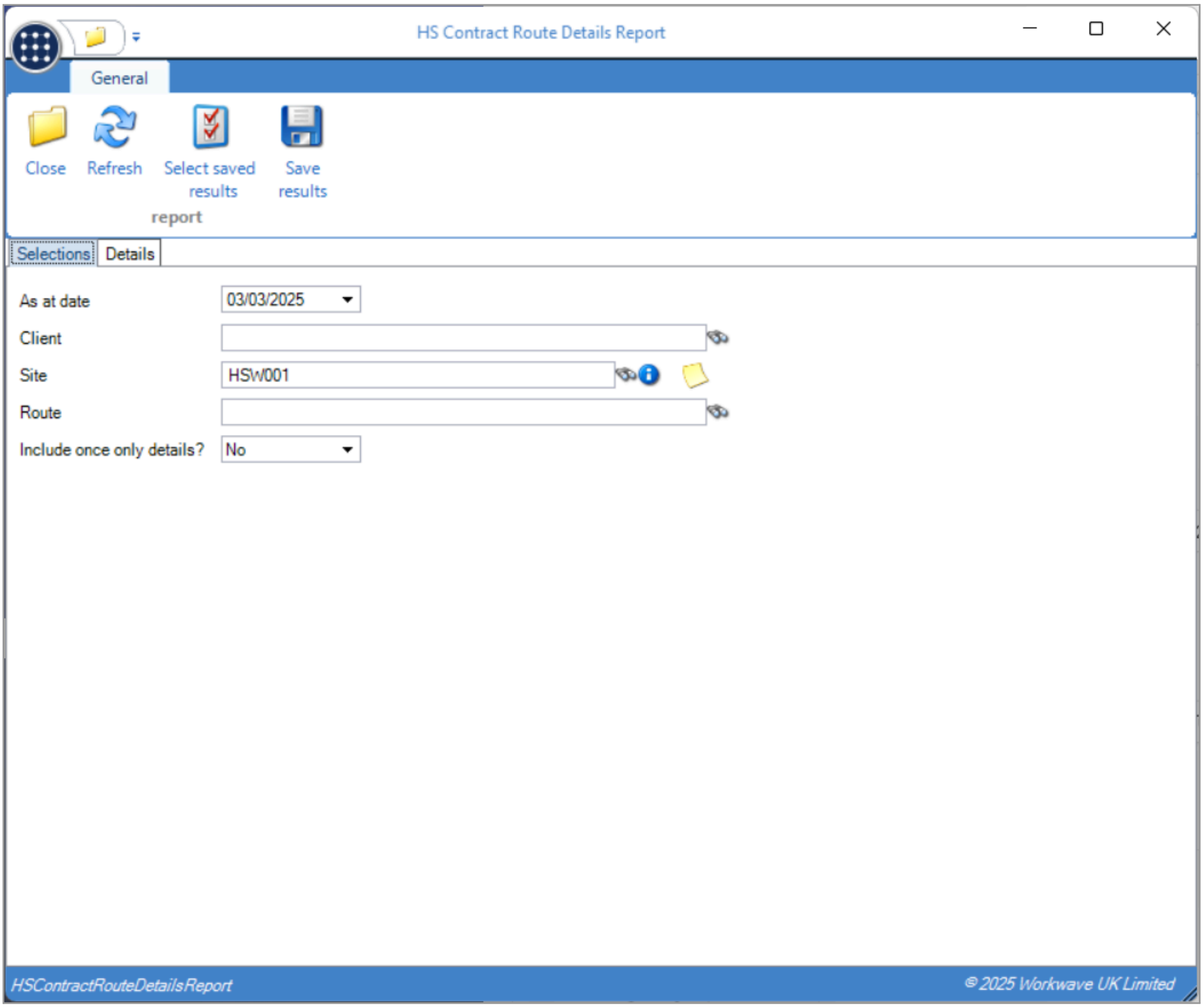
HS Contract Route Details Report

Background

A new HS Contract Route Details Report allows reporting of contract service lines, their client charge, and to help identify lines where the frequency of services and details do not match.

HS Contract Route Details Report

A new HS Contract Route Details Report is available, added to the navigator by default under Hygiene Services. The user must specify the "As at date", but all other selections are optional.

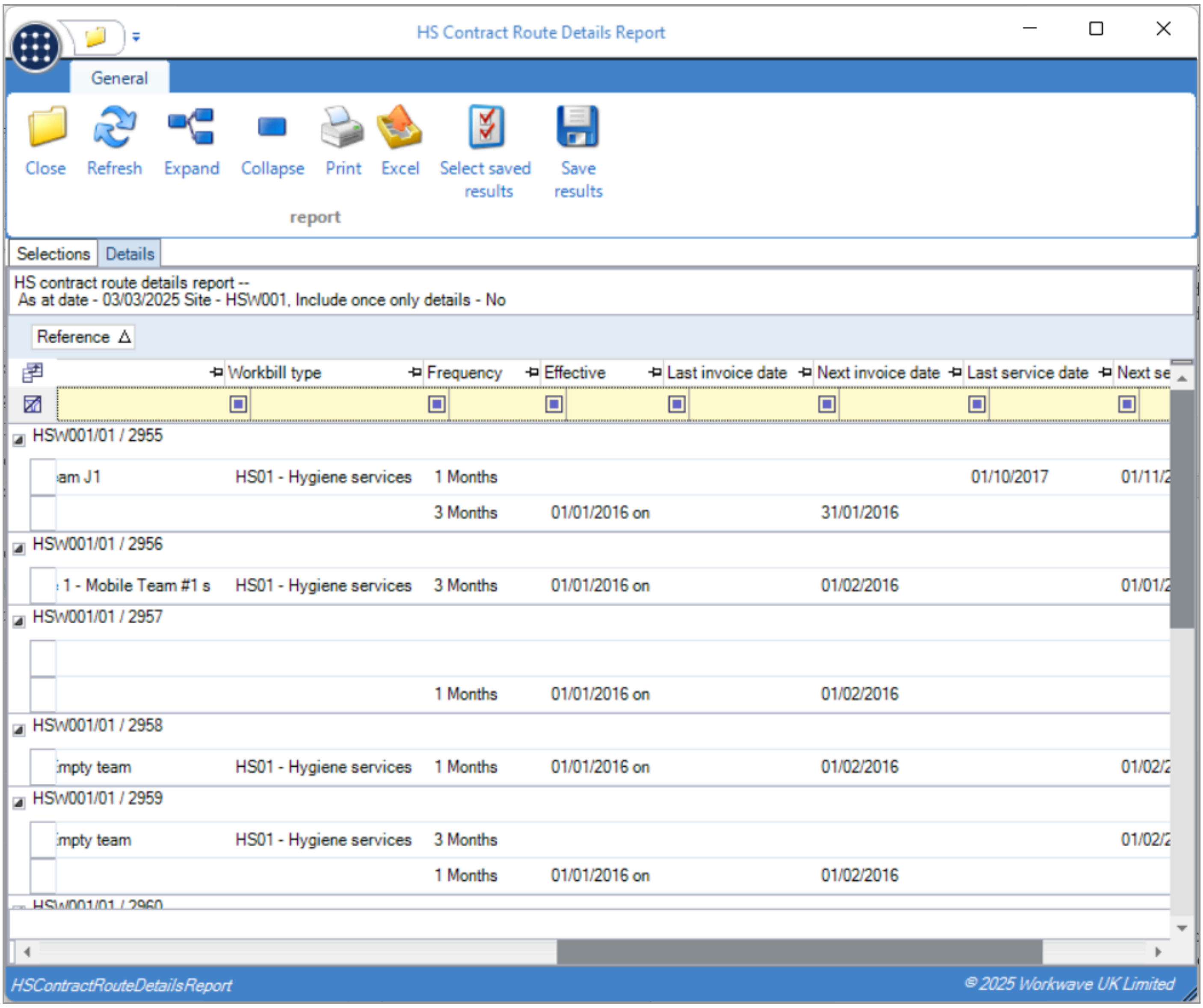


When run, all contract hygiene service lines effective at the entered date, and matching the other criteria are extracted. All detail lines for these services are also extracted, assuming they match the route, and their frequency matches the include once only details option. The data is then plotted and grouped by reference – a composite field of contract code and hygiene service Id along with columns for:

- Title
- Site
- Client
- Route (the first route entered on the HS detail)
- Team

- Workbill type
- Frequency
- Effective
- Last invoice date
- Next invoice date
- Last service date
- Next service date
- Client charge

Where a single service line exists with a single detail line and they share the same frequency, a single row exists under the grouped reference containing all information from the service and detail line. Where multiple detail lines exist, or the frequency does not match, then a line containing the service details is added along with lines for the details.



The normal ability to expand, collapse, print, and export to Excel exist along with the ability to save and load reports and run on batch.

Third Party QA Forms – Task Integration

Background

Third party QA integration allows QA forms to be created in TemplaCMS, while the actual QA process is handled by a third-party system (e.g., Lighthouse). Third-party QAs are then imported via the Gateway, and the QA form in TemplaCMS is optionally marked as complete. Both normal and third-party QA forms are visible on the QA section of Customer Portal. Third party QAs can be imported with attachments that are then added to the Third party QA form.

Third party QA integration has been extended to allow the import of Tasks from the third party system.

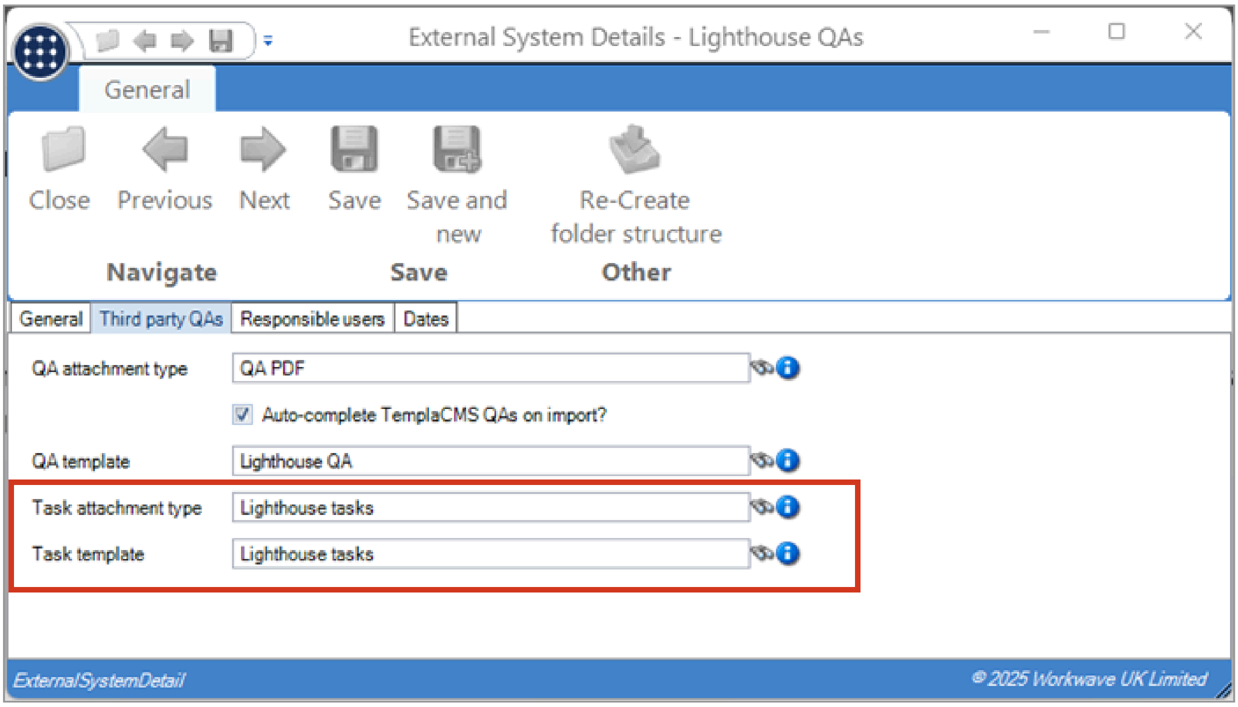
QA Structure

A new QA template must be set up to facilitate this feature:

- Site Structure = Lighthouse tasks.
- Template Type = Lighthouse tasks - This must be enabled for the Customer Portal.
- Attachment Type = Lighthouse tasks.

External System Details

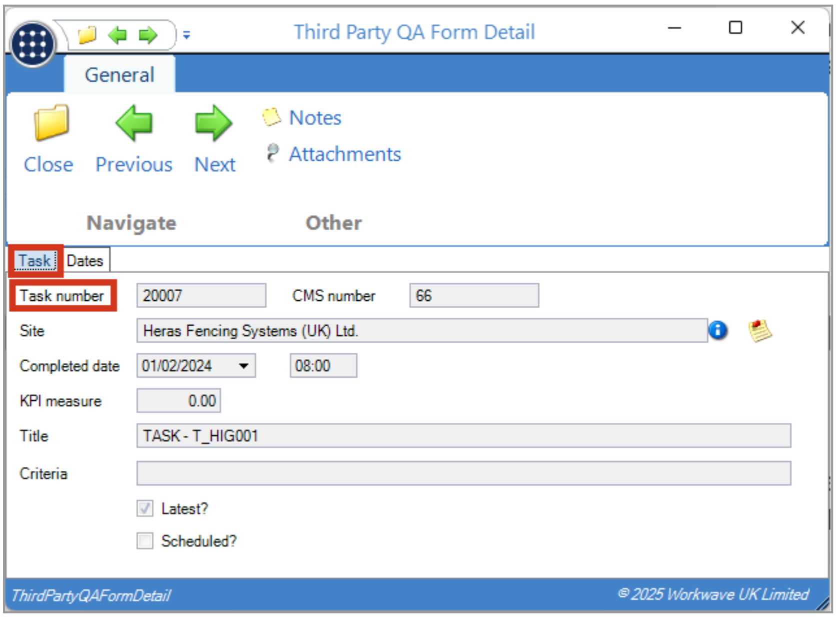
Additional options have been added to the definition of the External System definition for Third party QA:



- Task attachment type - As with Audit import, define the attachment type to be used when an imported document (PDF) is attached to a third party QA (task) form.
- Task template type - If the Auto-complete checkbox is selected, the template type must be defined. As with audit import, the template type is used to locate the scheduled QA form that is to be completed when the task is received.

Third Party QAs

A new Task? column has been added to the column chooser on the Third party QA Form list screen. On the detail screen, tasks are indicated by the wording on the screen:



Gateway Import

Task import works in the same way as Audit import. When a task is successfully imported, it creates a Third party QA Form that is flagged as a Task. Any associated attachment is added to the Third party QA form with the appropriate Attachment type. The auto-complete process identifies any TemplaCMS QA forms that have the appropriate Task template, where the site and scheduled date (month/year) match the site and completed date (month/year) of the import file, and mark them as completed.

Customer Portal

Third party tasks are visible on the QA forms list, together with their associated attachments.   Third party tasks are excluded from any monthly KPI calculations (as they have zero KPI, they should not be included).

Purchase Invoice – PDF Attachment

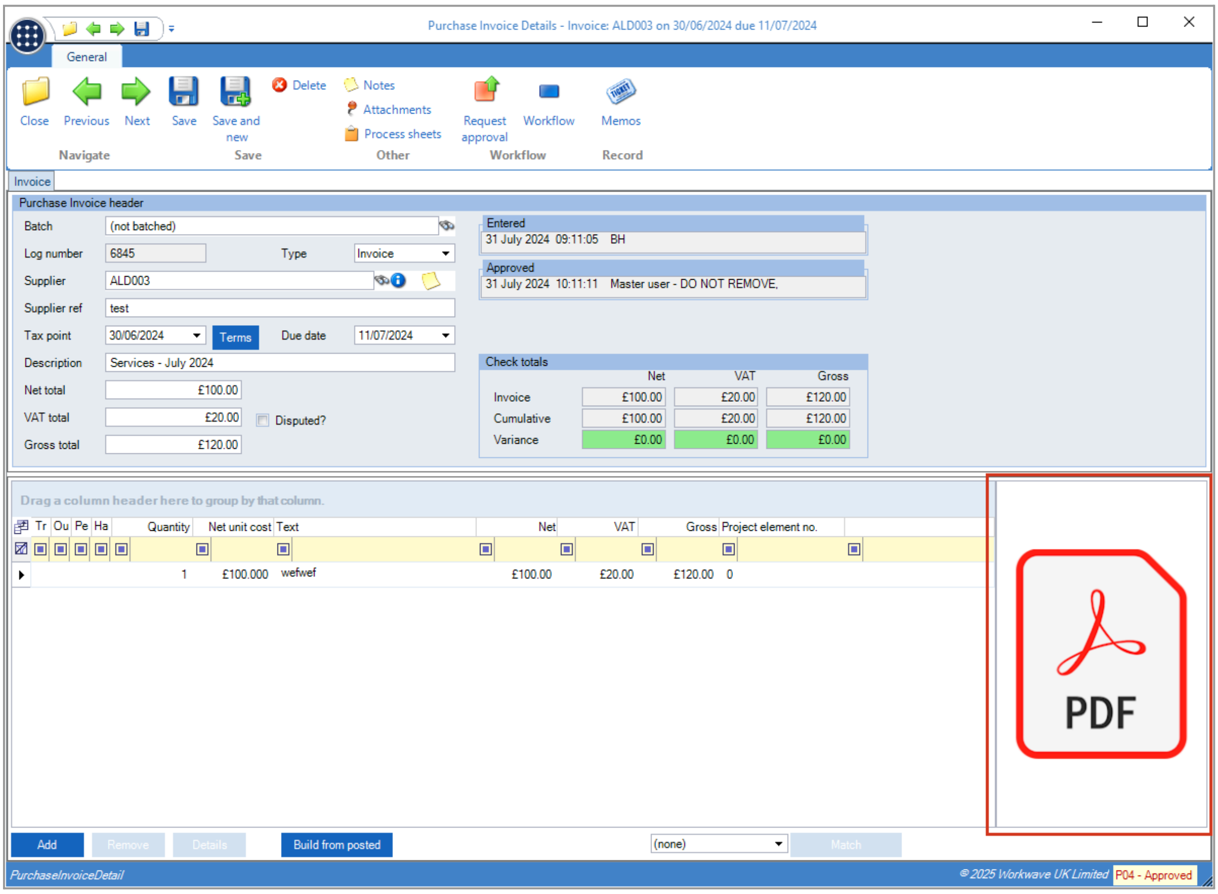
Background

In a previous update to TemplaCMS it was made possible to identify a certain purchases invoice attachment type as being for record display. This meant that where an image of this type was attached to a PI, a thumbnail would show, providing single click access to the scanned image of the invoice.

This facility only supported the use of image files, not PDFs.

Purchase Invoice Details

Where a PDF of an invoice has been attached using the nominated attachment type, it is not possible to show a thumbnail of the PDF. However, the routine has been modified to show a specific button in place of the thumbnail, identifying that a PDF exists.



As with the image thumbnail, clicking this PDF button provides single-click access to view the invoice document.

Client and Supplier – Account Types

Background

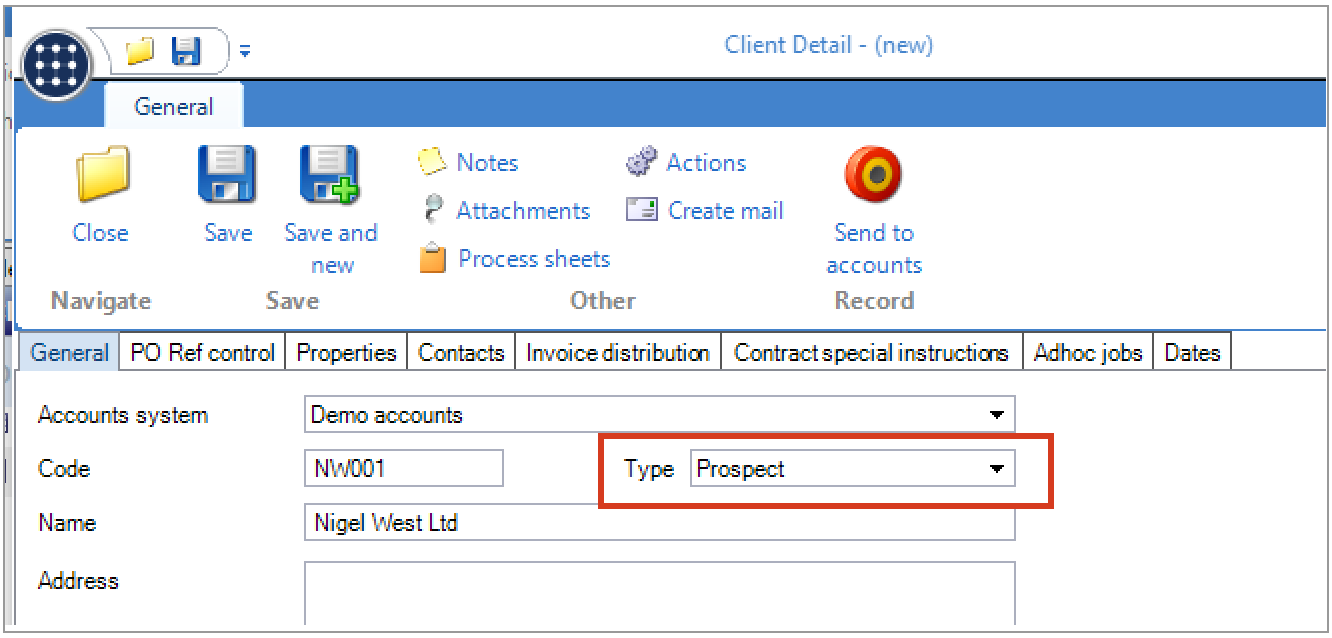
When creating clients or suppliers, the user nominates the Account Type as one of the following:

- Owned – Where the account is owned by Dimensions accounts.
- Managed – Where the account is managed solely within TemplaCMS.
- Prospect – Where the account is a prospect that may ultimately be converted to either Owned or Managed.

The defaulting of this setting has now been improved.

Client and Supplier Details

When adding a new account (either Client or Supplier), the Account Type is now be automatically set based on the accounts system selected.



Where the accounts system selected is Dimensions, the type defaults to Prospect. Otherwise it defaults to Managed.

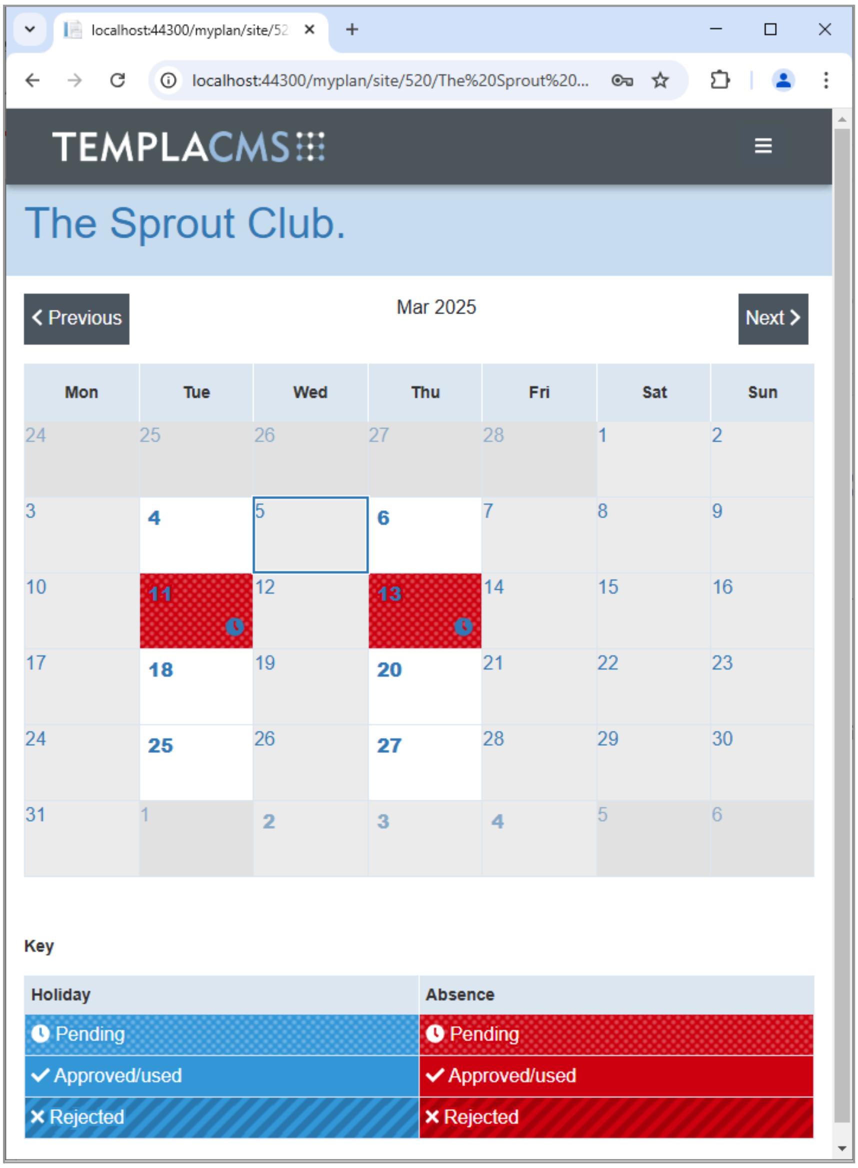
Employee Portal – Contracted Working Hours

Background

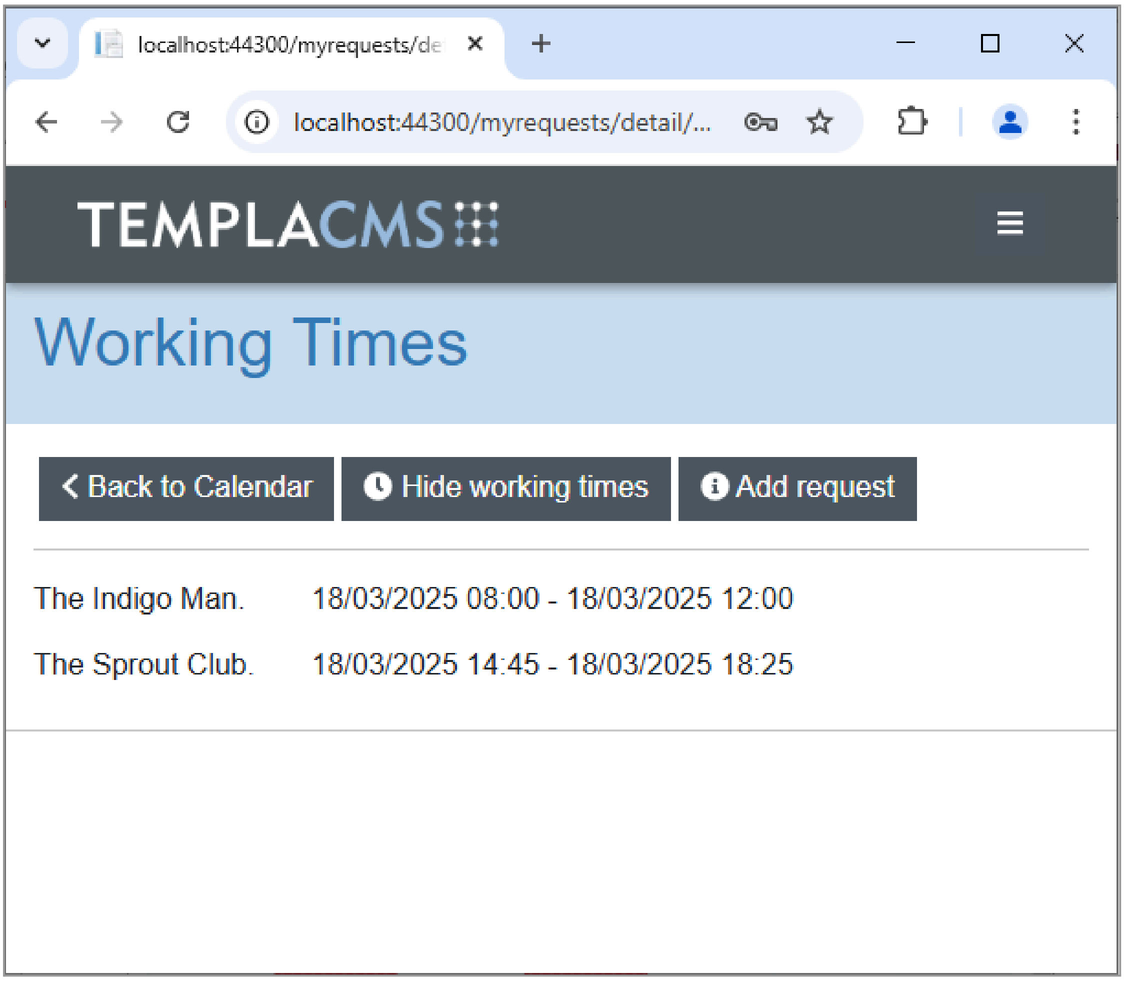
The Employee Portal allows the user to view a calendar of their holiday and absence requests via the My Plan option. This has been enhanced to show their working days and times.

My Plan

Having selected a site card, the calendar presented now displays contracted working days as white, and non-contracted days as grey.

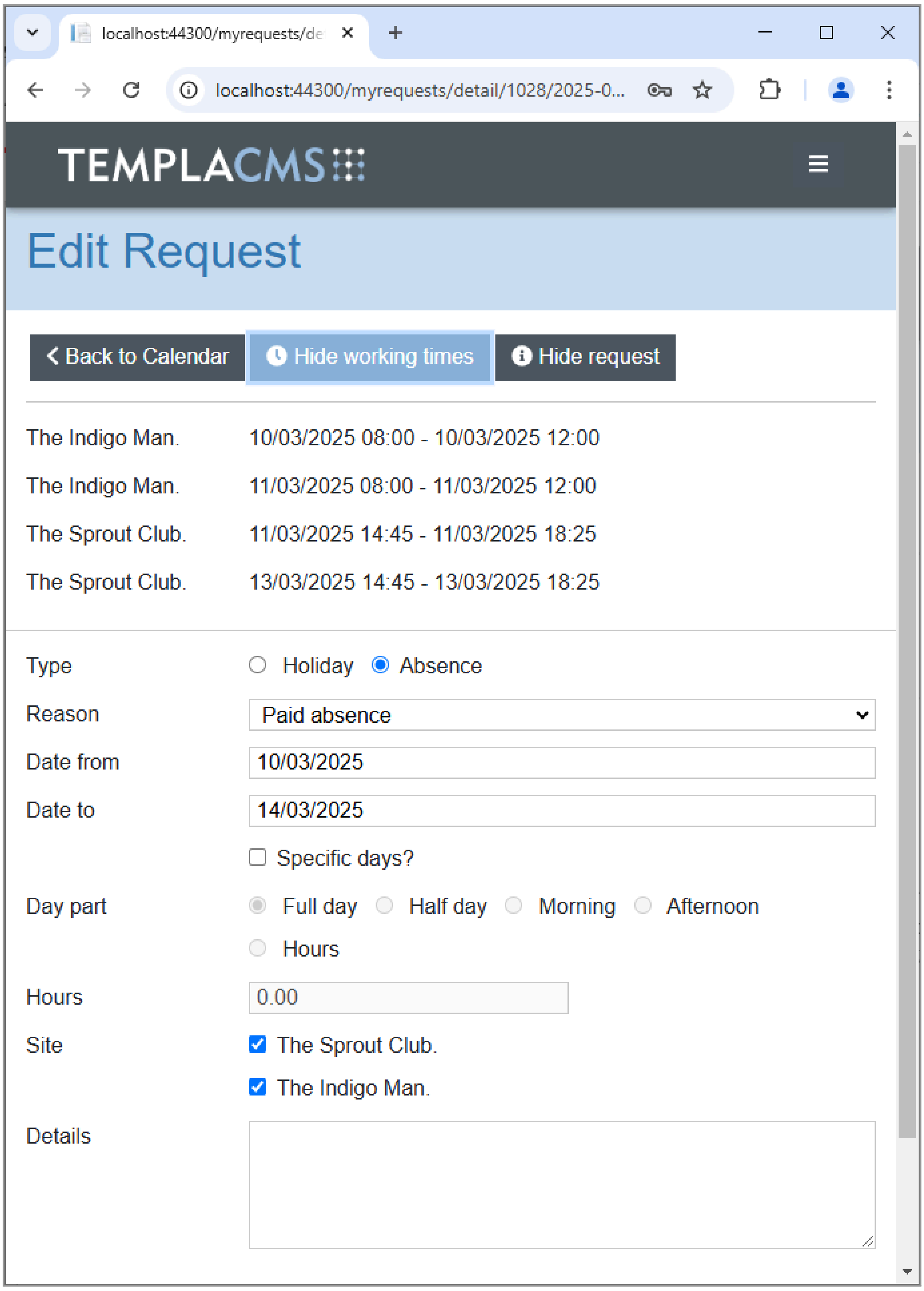


Tapping/clicking on a contracted day now takes the user to a view of their contracted working times on that day.



Note that even though the calendar was for a single selected site, contracted working times for all sites are shown (where they exist). If the employee wishes to request absence of holiday for this day, this pre-existing process can be accessed via the Add request button.

When viewing an existing request, a corresponding button for Show working times allows all the working times relevant to the request to be seen:



Log Numbers

This enhancement update contains the following log numbers:

WI4011

WI4743

WI5222

WI5223

WI5270

WI5278

TEAM Software

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.