



TemplaCMS Newsletter

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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.

CURRENT STAFF REPORT

Background

The current staff report is displayed at employee/site level, and as such, the length of service is calculated from the earliest contract start date for an employee at that site. The ability to select a different length of service type is now available on the report.

Current Staff Report

A new **Length of service type** option has been added to the Current staff report with options for:

- Earliest contract start date (the existing logic with the length of service date coming from the earliest contracted assignment from the employee, and where there's no date returned on non-contracted employees).
- Employee joined date.
- Employee TUPE date over joined date (the TUPE date will be used in preference to the employee joined date if one exists).

The screenshot shows the 'Current Staff Report' application window. The 'General' tab is active, displaying a toolbar with 'Close', 'Refresh', 'Select saved results', and 'Save results' buttons. Below the toolbar, the 'Selections' tab is selected, showing a form with fields for 'Date' (17/07/2025), 'Datasource', 'Client' (Viking Funerals), 'Site', 'Employee type', and 'Task type'. The 'Assignment' section has radio buttons for 'Contracted' (selected), 'Non-contracted', and 'All'. The 'Length of service type' dropdown menu is open, showing four options: 'Earliest contract start date' (selected), 'Earliest contract start date', 'Employee joined date', and 'Employee TUPE date over joined date'. The 'Include distance' checkbox is checked, and a 'Miles' field is visible. The 'Analysis' tab is also visible, showing 'Business analysis' and 'Marketing analysis' sections with various filters and data fields. The footer of the application window displays 'CurrentStaffReport' and '© 2025 Workwave UK Limited'.

When run, the selected length of service type is used in determining the employee’s length of service and is visible in the report title.

Current Staff Report

General

CloseRefreshExpandCollapsePrintExcelShow analysis codesSelect saved resultsSave results

report

SelectionsDetails

Current staff report -- 17/07/2025
Datasource - Client - Site - The Indigo Man. Employee type - Task type - Assignment - Contracted Length of service type - Earliest contract start date

Site

Employee	Client	Length of service	Count
SE/MURPH01/003 - The Indigo Man.			8
**8241 - JEFF, sdf	QUARR1 - Yellowpatter Ltd 2abc	1 years, 231 days	1
**8253 - Eric Smith	QUARR1 - Yellowpatter Ltd 2abc	8 years, 141 days	1
**8454 - Mr Tim Vex	QUARR1 - Yellowpatter Ltd 2abc	4 years, 199 days	1
200023 - Mr 123 ALJ123	QUARR1 - Yellowpatter Ltd 2abc	8 years, 141 days	1
74151 - Mr Andre Ccrua	QUARR1 - Yellowpatter Ltd 2abc	1 years, 199 days	1
8734 - Mr Wesley Copeland	QUARR1 - Yellowpatter Ltd 2abc	139 days	1
9000076 - Lisa Lubikova	QUARR1 - Yellowpatter Ltd 2abc	1 years, 162 days	1
9000099 - Frederica Sykes	QUARR1 - Yellowpatter Ltd 2abc	1 years, 139 days	1
			8

CurrentStaffReport

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LONG TERM ABSENCE REPORT

Background

A new Long Term Absence Report has been added to TemplaCMS to allow the easy identification of employees who have been absent at a site for more than a specified number of days.

Long Term Absence Report

A new Long Term Absence Report has been added to TemplaCMS, by default under Reports > Employees > Performance. Selection criteria exist for:

- Date range, defaulting to the current year
- Absence days, with the ability to report by either Total length of absence or Total days absent
- Optional datasource
- Optional employee
- Filtering to current employees only
- Optional client
- Optional site
- Optional business analysis levels
- Any number of absence reasons

The screenshot shows the 'Long Term Absence Report' window. It has a 'General' tab and a toolbar with 'Close', 'Refresh', 'Select saved results', and 'Save results' buttons. Below the toolbar are 'Selections' and 'Details' tabs. The 'Selections' tab is active, showing fields for 'From' (01/01/2025) and 'To' (31/12/2025). There are also fields for 'Absence' (days based on), 'Datasource', 'Employee', 'Client', and 'Site'. A dropdown menu for 'Absence' is open, showing 'Total length of absence' and 'Total days absent'. A checkbox for 'Only current employees?' is present. A list of 'Business analysis' levels is shown: Area Mgr, Client contract, Contract Mgr, Internal, Ops Mgr, Region, and TimeGate branch. A list of 'Absence reasons' is also shown: all, Adoption, Authorised absence, Authorised absence (paid), Authorised absence (unpaid), Authorised Maternity, AWOL, Bank holiday, C, Expired Visa, Illness, Illness Coughing, and Insufficient auto-leave. The footer of the window displays 'LongTermAbsenceReport' and '© 2025 Workwave UK Limited'.

When run, the report extracts all relevant absences from timesheets and builds a row at employee/site level for any absence which meets the required length of absence.

Employee code	Employee	Site code	Site	Absence start	Absence end	Total days absent	Total length of absence	Absence reason
**8241	JEFF, sdf	SE/MURPH01/003	The Indigo Man.	01/01/2025	31/01/2025	23	31	AwOL
**8318	Kelp, Anne	QUARR1/017	The Angle	09/05/2025	23/05/2025	11	15	Authorised Maternity
**8321	Kelp, Bob	BHGH2	Billi's greenhouse 2	01/05/2025	14/05/2025	10	14	Maternity leave
**8339	DEMO, VACANCY	SC001	The Sprout Club.	01/01/2025	28/02/2025	43	59	Authorised absence
**8406	Kronos, Kronos	KRONOS	KRONOS	01/01/2025	31/01/2025	23	31	AwOL
**8518	Mr Alex Smith	BAN001/007	AJ's Coffee Shop - Coxheath	01/01/2025	31/01/2025	23	31	AwOL
**8518	Mr Alex Smith	BAN001/008	AJ's Coffee Shop - Marden	03/01/2025	31/01/2025	21	29	AwOL
**8518	Mr Alex Smith	BAN001/009	AJ's Coffee Shop - Tonbridge	01/01/2025	31/01/2025	23	31	AwOL
100001	Mr Adam Jeffrey	QUARR1/011	Primary Site 1	01/01/2025	31/01/2025	19	31	AwOL
100001	Mr Adam Jeffrey	QUARR1/012	Secondary 1	01/01/2025	31/01/2025	23	31	AwOL
100001	Mr Adam Jeffrey	QUARR1/013	Secondary 2	01/01/2025	31/01/2025	23	31	AwOL
100001	Mr Adam Jeffrey	QUARR1/014	Secondary 3	01/01/2025	31/01/2025	23	31	AwOL
200023	Mr 123 ALJ123	SE/MURPH01/003	The Indigo Man.	01/01/2025	31/01/2025	23	31	AwOL
74151	Mr Andre Ccual	SE/MURPH01/003	The Indigo Man.	04/03/2025	28/03/2025	19	25	AwOL
						332	460	

Note that the options for **Total length of absence** or **Total days absent** has a significant effect on the results seen in this report. For example, if an employee only works one day a week and is absent for three weeks in a row, this is just three days of absence, but would be seen as fifteen days in terms of length (i.e. the number of days between the first and last absence recorded in this contiguous block of absence).

TIMEGATE+ INTEGRATION – EMPLOYEE BRANCH

Background

In Timegate+, employees are associated with a branch. In TemplaCMS, there is no native concept of a “branch,” but the Timegate+ integration configuration allows customers to nominate a Business Analysis Level to represent branches.

An issue arises when employees are not currently assigned to a site (e.g. mobile workers), as Templa is unable to determine which branch to send. In these cases, the system currently defaults to sending the first available branch. For many Timegate+ installations that operate as a single branch, this is not a problem. But for those with multiple branches, this can result in the employee moving between branches depending on where (TemplaCMS or Timegate+) it was last updated.

This process has now been enhanced to allow TemplaCMS employees to be directly assigned to a branch.

Employee Details

A new optional **Time and attendance** field has been added to allow users to explicitly view and set an Employee’s Timegate+ Branch.

This field is only visible when the Timegate+ integration is enabled via the External Systems configuration.

The screenshot displays the 'Employee Detail' window for 'Danute ARAUJO'. The 'General' tab is active, showing a toolbar with icons for Close, Previous, Next, Save, Notes, Attachments, Planner, Transactions, Quick email, Print label, Print badge, Check working time conflicts, and Reports. Below the toolbar, a tabbed interface includes 'General', 'Right to work', 'Auto Enrolment', 'Banking', 'Sites', 'Holidays', 'Properties', 'History', 'Teams', 'Furlough/USS', 'Time and attendance', and 'Image'. The 'Time and attendance' tab is selected, revealing a 'System' section with 'Overriding external reference/code' and a table with one row. A red box highlights the 'Employee Branch' field, which is set to 'Templa branch'. Other fields include 'Employee PIN' (0381) and 'Alerting' (Alert via: None). The footer shows 'EmployeeDetail' and '© 2025 Workwave UK Limited'.

Integration Priority

- If a value is set in the new field, it overrides the existing derived Business Analysis Level functionality.
- If the new field is empty, existing derived Business Analysis Level functionality remains in place.
- If bi-directional (or Timegate+ to Templa) integration is enabled, any branch updates made in Timegate+ populate the new field in Templa. Once populated, the Business Analysis Level derivation is no longer used for that employee.

Over time, as employee records are updated from Timegate+, more employees are explicitly assigned a branch in TemplaCMS, thus reducing reliance on derived data and giving users clearer, more consistent control.

TIME AND ATTENDANCE LOGS

T&A Logs

Validation has been introduced when creating T&A logs (for clock in/out) to prevent the confirmation of actual dates that are future of today.

This validation applies to the manual creation or amendment of logs via the TemplaCMS windows application, as well as to the automatic creation of logs via a T&A system interface (for example, Timegate, Timegate+, etc.).

BILLING REVIEW – DAY PATTERN

Background

The Billing Review process allows maintenance of Day pattern billing, with the pattern being a free-format string. This has been modified to use the predefined billing frequency patterns to bring it into line with Contract Billing.

Billing Review Batch

When the change Frequency is Day pattern, the Pattern is now selected from the predefined Billing frequency patterns. The pattern text (e.g. 28/28/28/35) is shown alongside for reference. As before, if the change is set to Day pattern, then only contract billing lines that are defined as **Use daily rate** are included when the batch is generated.

Billing Review Batch Details - (new)

General

CloseSaveDeleteNotesPost

NavigateSaveOtherBatch

GeneralExtraction

Batch numbernew batchDescriptionNL FrequencyAccounts systemDemo accountsReview typeValueFrequencyEnd dateReview date31/05/2025

Change

BasisunchangedFrequencyDay patternPatternPattern 128/28/28/35Position1

Reason for change

On the Extraction criteria, it is now possible to select a Frequency of Day pattern, in which case a Pattern must be selected.

Billing Review Batch Item - NL Frequ...

General

Close

Accept

Accept and new

Navigate

Save

Extraction

General

Business Analysis

Properties

Client

Site

Contract

Task type

Invoice run type

Frequency

Day pattern

Pattern

BillingReviewBatchItemDetail

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If **Day pattern** is selected on the criteria, only contract billing lines with the selected Pattern are included when the batch is generated.

On the Item list, the existing Pattern and New pattern columns show the pattern text. Additional columns showing the Billing frequency pattern and the New billing frequency pattern are not shown by default but can be selected from the column chooser.

Billing Review Item List

General

Close

Refresh

Print

Open

Filter

Add new notes

Create import template

Import template

Comparison view

List

Row

Filt

S...

notes

Excel

View

Drag a column header here to group by that column.

Our ref	Reason f	Item stat	Frequen	New fre	Pattern	New pattern	Billing frequency pattern	New billing frequency pattern	Previous
OR5	Accept	Arrears	Arrears	Arrears	28/28/28/35	28/28/28/35	Code1 - Pattern 1	Code1 - Pattern 1	Accept
	Accept	Arrears	Arrears	Arrears	10/10/10	28/28/28/35	TEN - 10	Code1 - Pattern 1	Accept
	Accept	Arrears	Arrears	Arrears	10/10/10	28/28/28/35	TEN - 10	Code1 - Pattern 1	Accept
	Accept	Arrears	Arrears	Arrears	10/10/10	28/28/28/35	TEN - 10	Code1 - Pattern 1	Accept
	Accept	Arrears	Arrears	Arrears		28/28/28/35		Code1 - Pattern 1	Accept

BillingReviewItemList

5 rows

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On the Item detail screen, the Pattern text has again been replaced by the billing frequency pattern selector.

Billing Review Item

General

ClosePreviousNextSaveDelete

NavigateSave

Review Item

BatchNL Frequency

ContractBili's greenhouse 2

View billing line

Current details

BasisArrears

FrequencyDay pattern

Pattern10

10/10/10

Position1

Next invoice31/01/2024

New details

BasisArrears

FrequencyDay pattern

PatternPattern 1

28/28/28/35

Position1

Next invoice28/04/2024

Reason for change

BillingReview/ItemDetail© 2025 Workwave UK Limited

On the Import template, the New pattern column has been replaced with the New pattern code column, and, if required, must be populated with a valid Billing frequency pattern code, rather than the pattern text.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Billing Frequency Review Item Template															
01 August 2025															
State Id	Batch number	Client	Site	Contract	Invoice text	Frequency	New period basis	New frequency period	New frequency	New arears frequency	New pattern code	New pattern position	Next invoice date	Reason for change	
Ref: 14547	1439	WSB013	BHGH2	IWI5686A	Billing Day Pattern 3	Arears Day pattern 2	Arears	Day pattern	0	0	Code1	1	30/04/2025		
Ref: 14548	1439	WSB013	BHGH2	IWI4347A	Billing line 3 3 month	Arears Day pattern 1	Arears	Day pattern	0	0	Code1	1	28/04/2024		
Ref: 14549	1439	WSB013	BHGH2	IWI4347A	Billing line 4 pattern 10	Arears Day pattern 1	Arears	Day pattern	0	0	Code1	1	28/04/2024		
Ref: 14550	1439	WSB013	BHGH2	IWI4347A	Billing line 5 pattern code 1	Arears Day pattern 1	Arears	Day pattern	0	0	Code1	1	28/04/2024		
Ref: 14551	1439	WSB013	BHGH2	IWI4347A	Billing line 6 day pattern code 2	Arears 1 Months	Arears	Day pattern	0	0	Code1	1	28/04/2024		

On batch post, the contract billing lines are updated with the new pattern code.

LOG NUMBERS

This enhancement update contains the following log numbers:

WI4347

WI5732

WI5734

WI5819

WI5865



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