

H TemplaCMS Newsletter

V6.1.0 | Update 2025.07 | July 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.

CURRENT STAFF REPORT

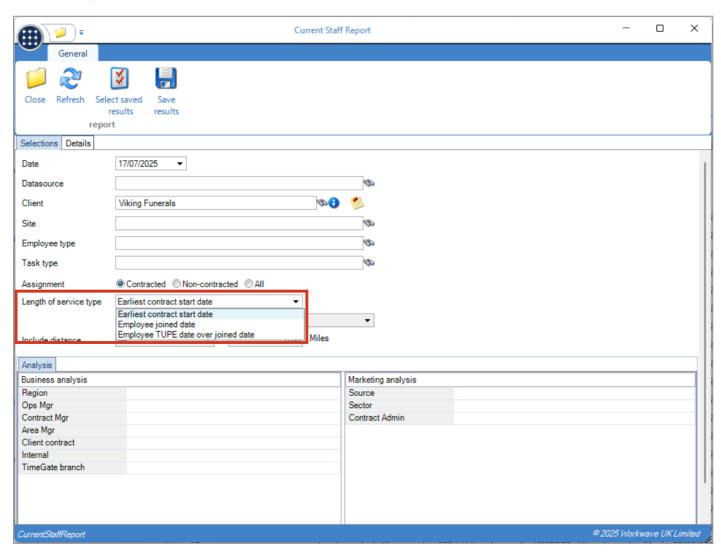
Background

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.

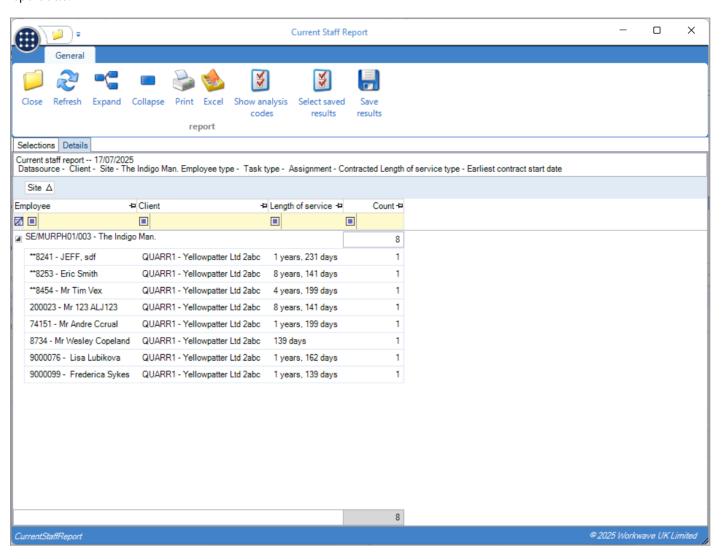
Current Staff Report

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).



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.



LONG TERM ABSENCE REPORT

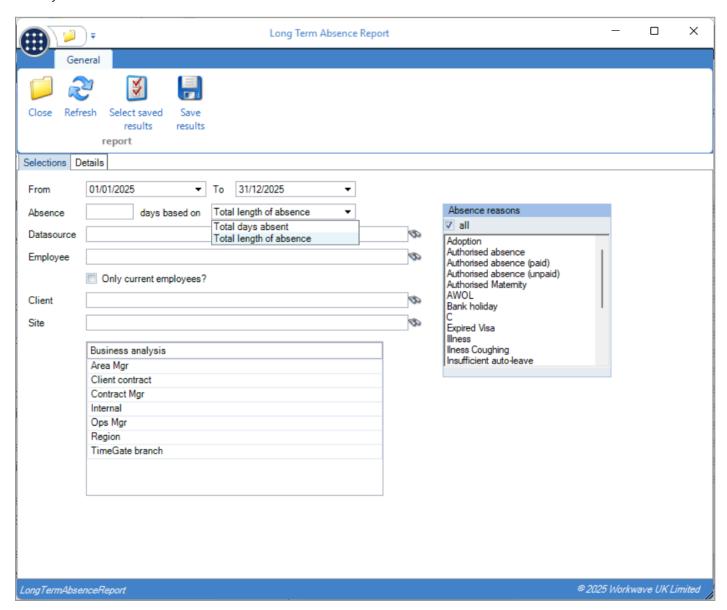
Background

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.

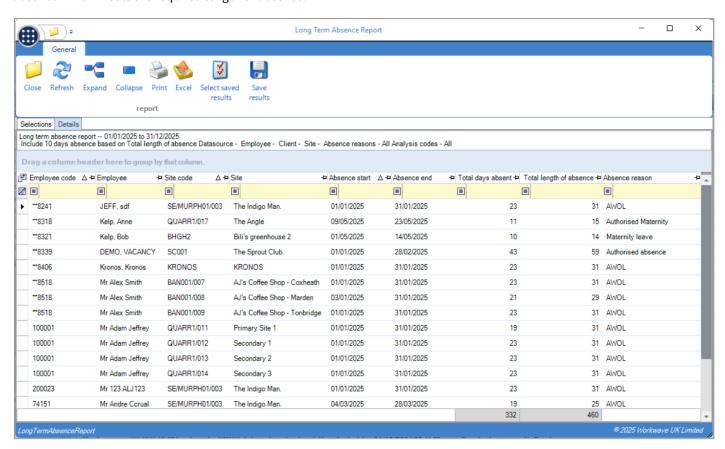
Long Term Absence Report

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



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.



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.

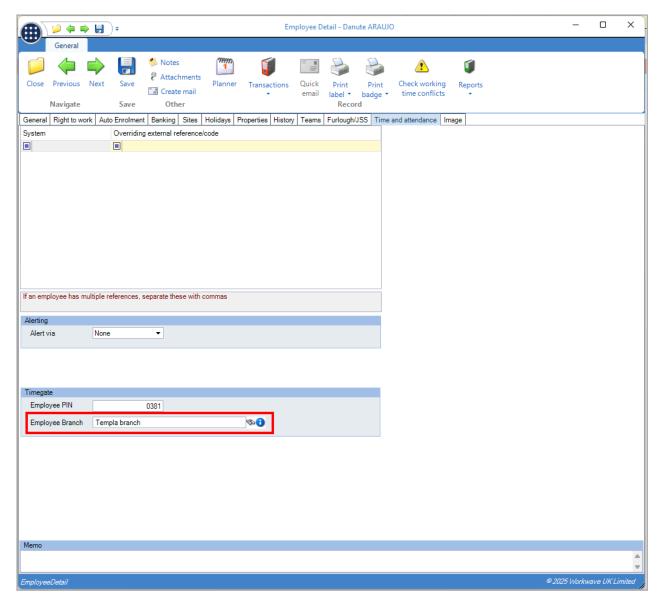
An issue arises when employees are not currently assigned to a site (e.g. mobile workers), as Templa is unable to determine which branch to send. In these cases, the system currently defaults to sending the first available branch. For many Timegate+installations that operate as a single branch, this 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.



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+, etc.).

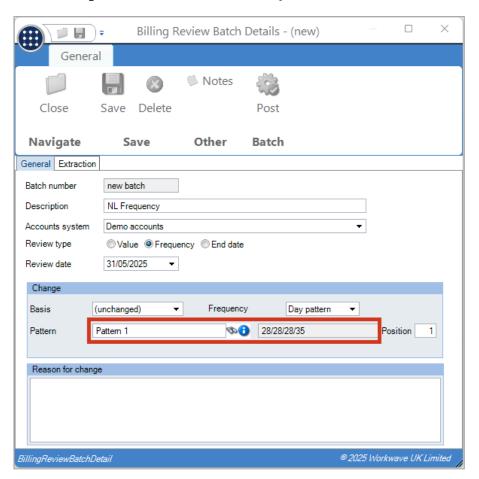
BILLING REVIEW - DAY PATTERN

Background

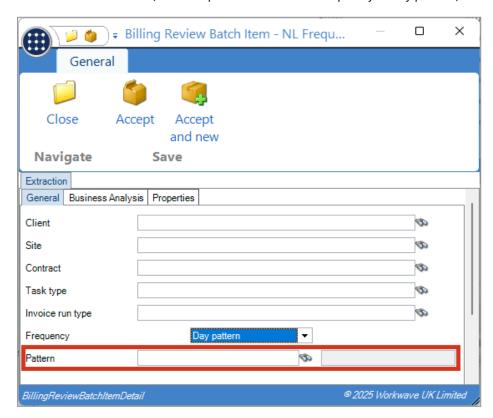
The Billing Review process allows maintenance of Day pattern billing, with the pattern being a free-format string. This has been modified to use the predefined billing frequency patterns to bring it into line with Contract Billing.

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.

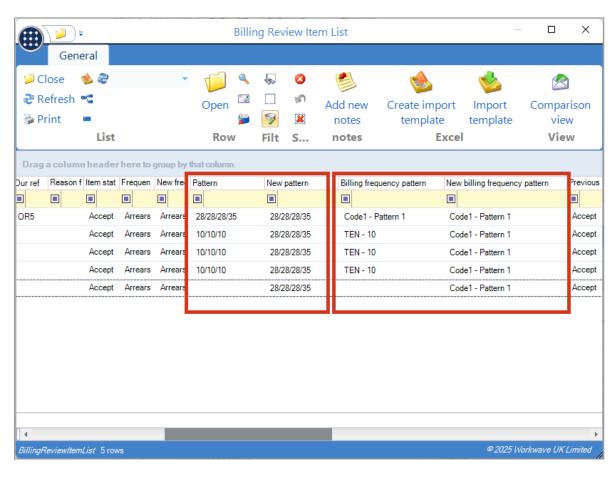


On the Extraction criteria, it is now possible to select a Frequency of Day pattern, in which case a Pattern must be selected.

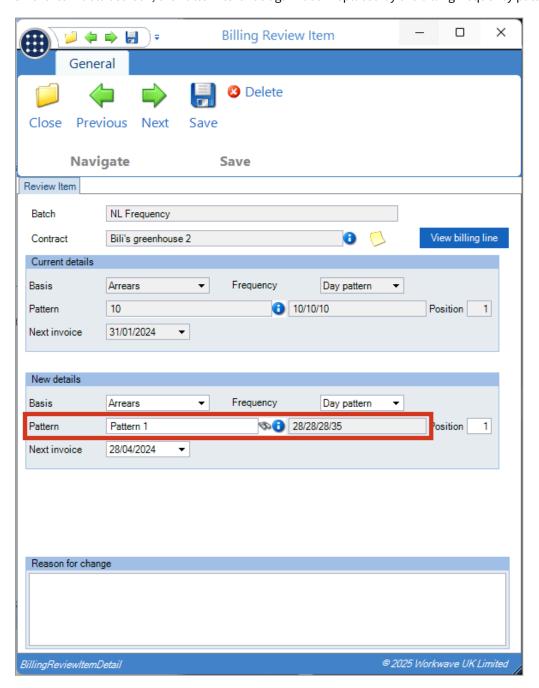


If **Day pattern** is selected on the criteria, only contract billing lines with the selected Pattern are included when the batch is generated.

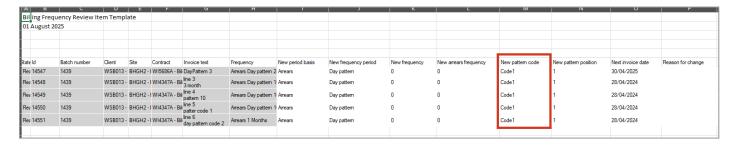
On the Item list, the existing Pattern and New pattern columns show the pattern text. Additional columns showing the Billing frequency pattern and the New billing frequency pattern are not shown by default but can be selected from the column chooser.



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



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.



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

Log Numbers

WI5865

This enhancement update contains the following log numbers:
WI4347
WI5732
WI5734
WI5819



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.