

# **TemplaCMS** Newsletter

V6.1.0 | Update 2025.09 | September 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.

#### QUERY REPORT PIVOT DRILLDOWN

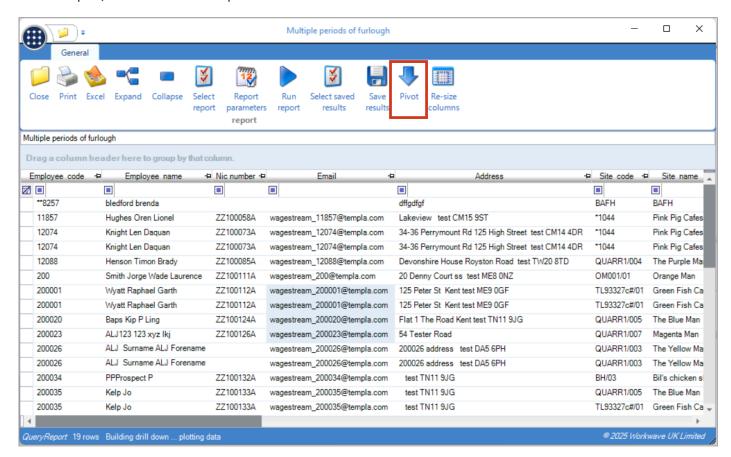
## **Background**

The ability to select one or more rows on a query report and pivot the data to a new grid view has been added.

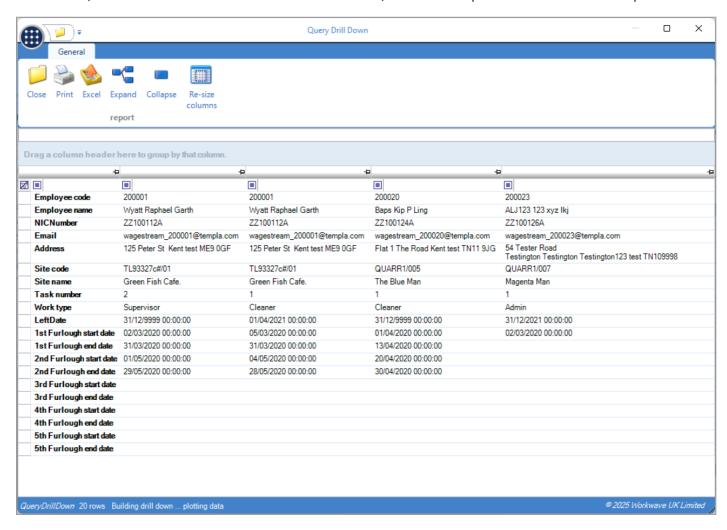
#### **Query Reports**

The generic requirement to pivot data directly from within TemplaCMS on query reports is now available for one (or more) selected rows. This also improves readability where a single cell contains a large amount of multi-line data, which results in hover text that can be hard to read.

On a run report, a new Pivot taskbar option is available when one or more cells are selected.



When clicked, each distinct row from the selected cells is extracted, and the data is pivoted to a new drilldown report.



The report allows normal print/export to Excel/expand/collapse, and like the query report allows the resizing of columns via a taskbar button. Additionally, all cells are activated so text can be directly copied into the local computer clipboard. Multi-line text is also handled in the drilldown.

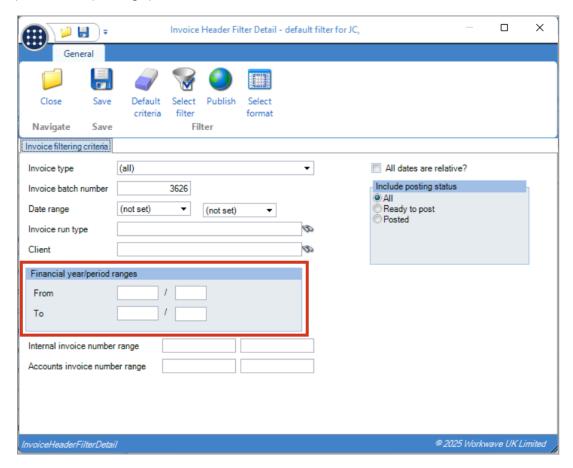
#### INVOICE LIST ADDITIONS

# **Background**

The ability to filter the invoice list by financial year and period has been added, along with the ability to see the **Our ref** column on the list.

#### **Invoice List**

The invoice filter now has additional options to filter by financial year and period from and to. These options filter exactly as per the corresponding options on the invoice line filter.



A new **Our ref** column has also been added to the column chooser.

As the invoice filter shows header level information, and Our ref is held at invoice line level, this column shows the same Our ref details that would print on the invoice itself when distributing. As such, the column is only filled on a header where a single, consistent reference appears on all the invoice lines on an invoice header.

### **BUDGET REVIEW**

# **Background**

The format of the Excel import template has been expanded.

# **Excel Import Template**

The budget review batch import template has been amended to include the contract budget description as a new read-only column between task and pay scale.



#### MAP BROWSER

#### **Background**

The equivalent of a web browser window is embedded in various places within TemplaCMS. It's currently used for two different purposes:

- Rendering blocks of text with rich formatting bold, font size, colours, etc.
- Rendering Internet-based web pages primarily for displaying and interacting with maps.

The browser component previously used within TemplaCMS was of an older generation, which was leading to errors and the inability to view pages from certain sources.

## **Upgraded Browser Component**

TemplaCMS has been upgraded to use the Microsoft WebView2 browser component, which is based on the Microsoft Edge browser. This improves compatibility with external websites, reduces rendering errors, and increases security.

### **Operating System Support**

The impact of this change depends on the version of Windows users are running.

- Windows 11 Nothing to do the WebView2 runtime is preinstalled with all versions of Windows 11.
- **Windows 10** Most devices will have received the WebView2 runtime as part of Windows automatic updates. It was first made available to consumers in April 2021.
- **Older** Uusers will most likely need to manually install WebView2, or they may experience a warning when opening relevant areas of TemplaCMS.

#### **Manual Installation**

If users need to manually install Microsoft WebView2 it can be accessed by opening the link below.

Look for the "Evergreen Bootstrapper" download for WebView2.

WebView2 automatically updates to ensure the latest browser security is maintained.

https://go.microsoft.com/fwlink/p/?LinkId=2124703

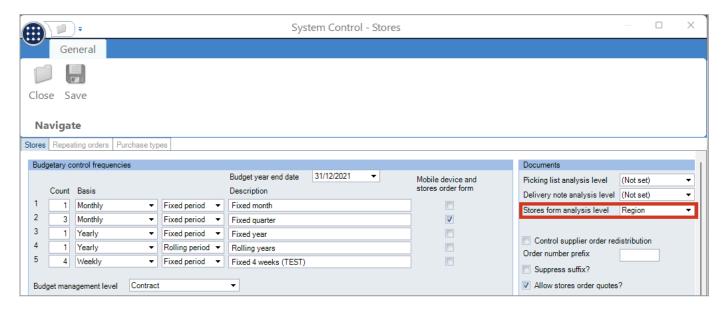
#### STORES ORDER DOCUMENTS

### **Background**

There is an existing option on System Control that allows a business analysis level to be selected to be printed on manual stores order forms. The same analysis details is now printed on the supplier copy of the stores order.

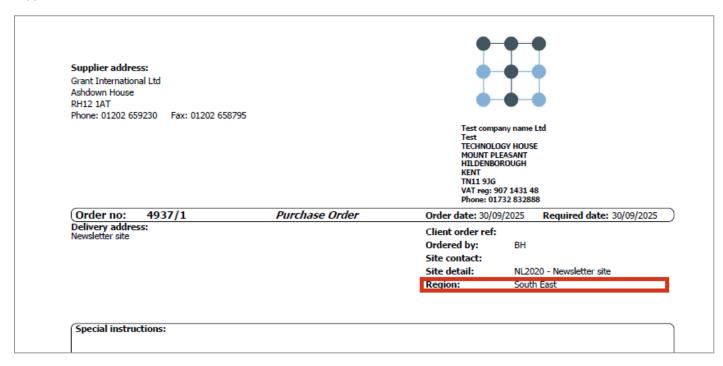
#### **System Control**

The business analysis level to be printed on the stores order documents is defined in System Control - Stores.



## **Supplier Order**

If defined in System Control, then the selected analysis level and the site's analysis code for that level is printed on the Supplier Order as shown below.



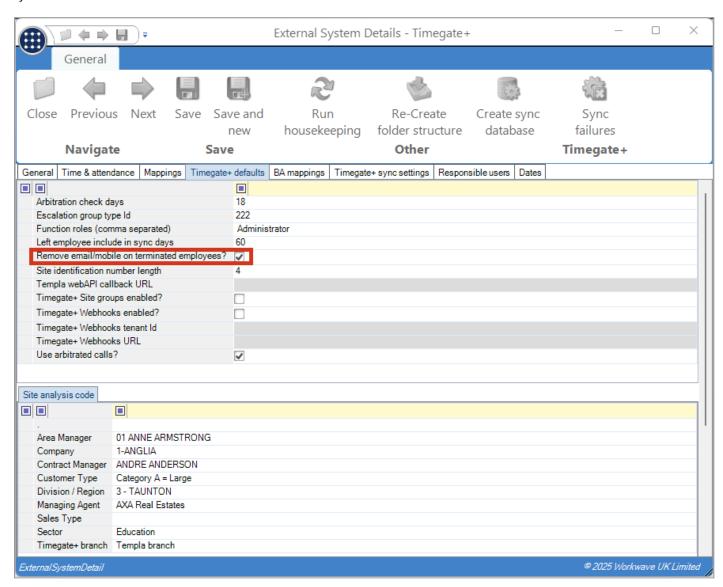
#### TIMEGATE+ TERMINATED EMPLOYEES

## **Background**

Timegate+ does not permit duplicate email addresses or mobile numbers across employees. This causes an issue when a previous employee is reemployed with a new employee number but with the same email address and/or mobile number, as the export from TemplaCMS to Timegate+ will be rejected.

#### **External System**

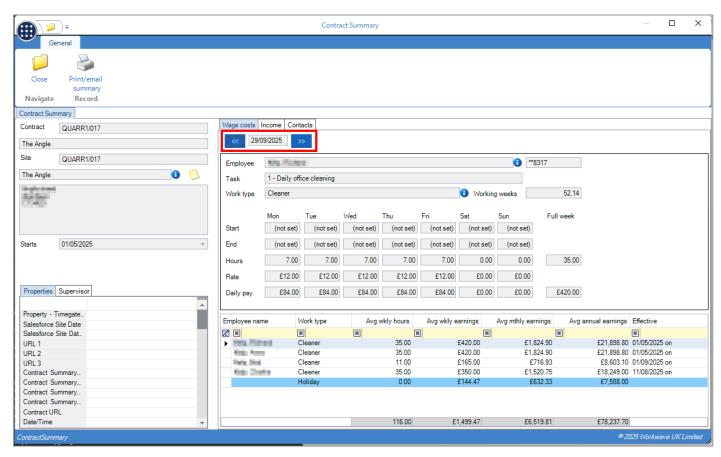
A new **Remove email/mobile on terminated employees?** option has been added to the Timegate+ defaults tab on External System Details.



When selected, the export of employee details from TemplaCMS to Timegate+ removes the email address and mobile number from Timegate+ if the employee has a Left date in TemplaCMS.

#### **CONTRACT SUMMARY WAGE COSTS**

The date navigator on the Contract Summary form has been moved such that it applies to the entire Wage Costs tab rather than just the currently selected employee. This means that the list of employees at the bottom of the form reflects those effective on the selected date rather than only listing those which are effective as of today's date.



# Log Numbers

This enhancement update contains the following log numbers:
WI5996
WI6073
WI5993
WI5994
WI5995
WI2788



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.