TemplaCMS Newsletter

V6.1.0 | Update 2025.01 | January 2025

COMMERCIAL STATEMENT

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Table of Contents

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.

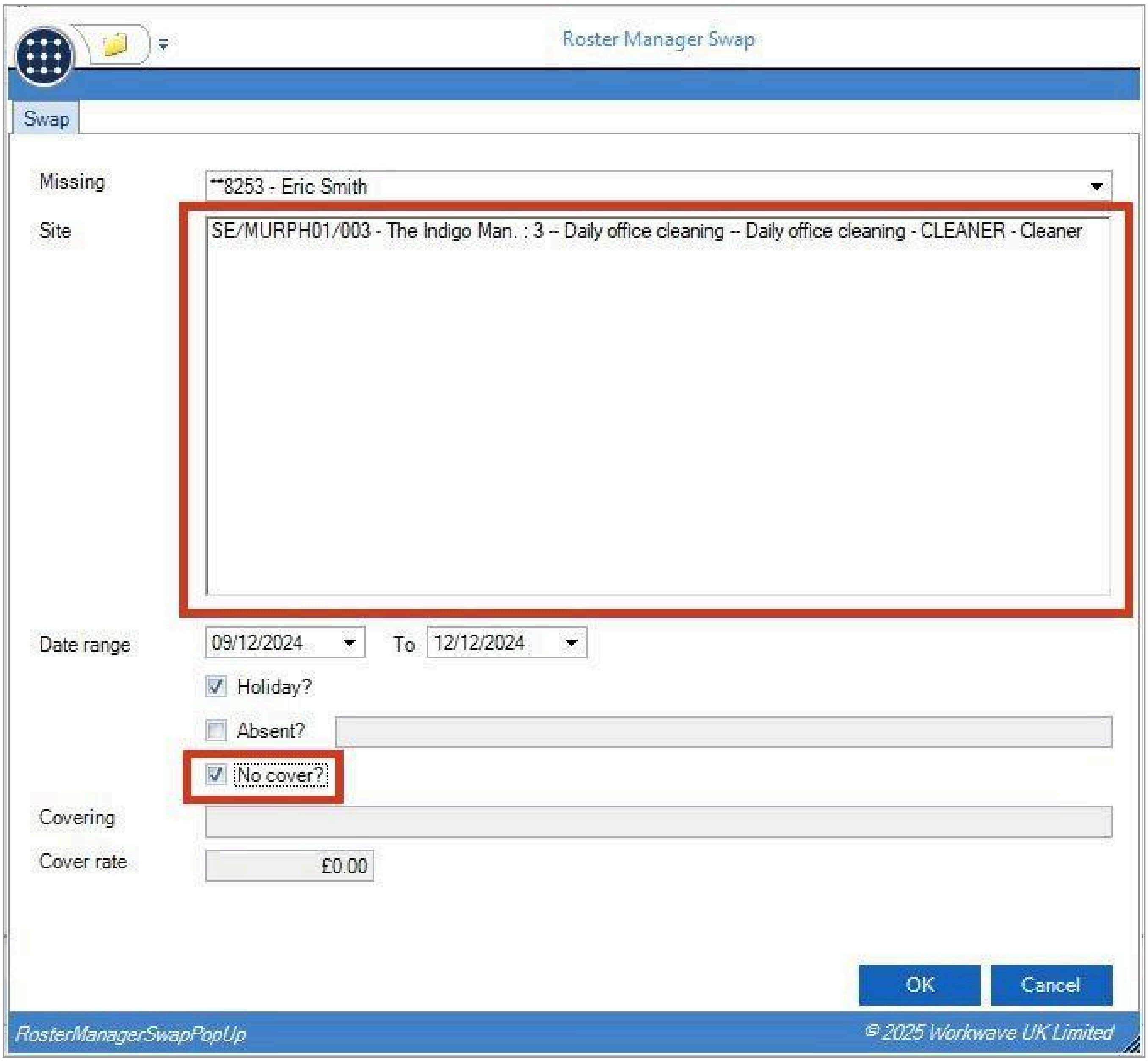
Roster Manager – Swap with No Cover

Background

Previously, the Roster manager swap functionality required a cover employee to be entered, so the user could easily apply multi-day absence or leave, but only if they assign a covering employee. This process has been changed to allow its use without nominating the covering employee.

Roster Manager Swap

A No cover? checkbox has been added:



When this new checkbox is selected, users are no longer required to enter details in the Covering or Cover rate fields.

When not selected, TemplaCMS continues to function as now i.e., Cover details must be defined.

Additionally, a Site box has been added, which displays a list of all sites the missing employee is scheduled to within the date range selected. The user can then highlight the site(s) they should be set as missing for.

Roster Manager – Multi-Toggle

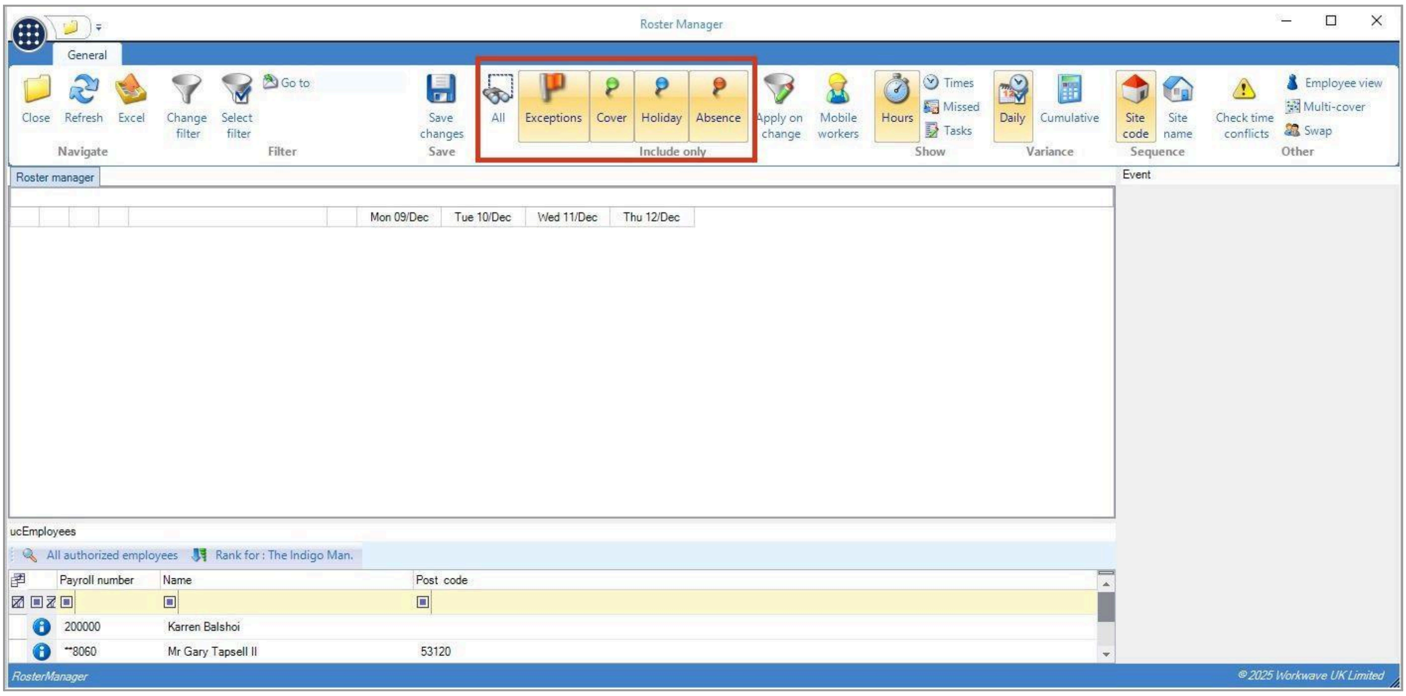
Background

Previously, Roster manager allowed users to select only one toggle either Exceptions, Cover, Holiday or Absence.

This has now been enhanced to remove this restriction.

Roster Manager

Roster manager has been modified so that users can select multiple of the below options in combination:



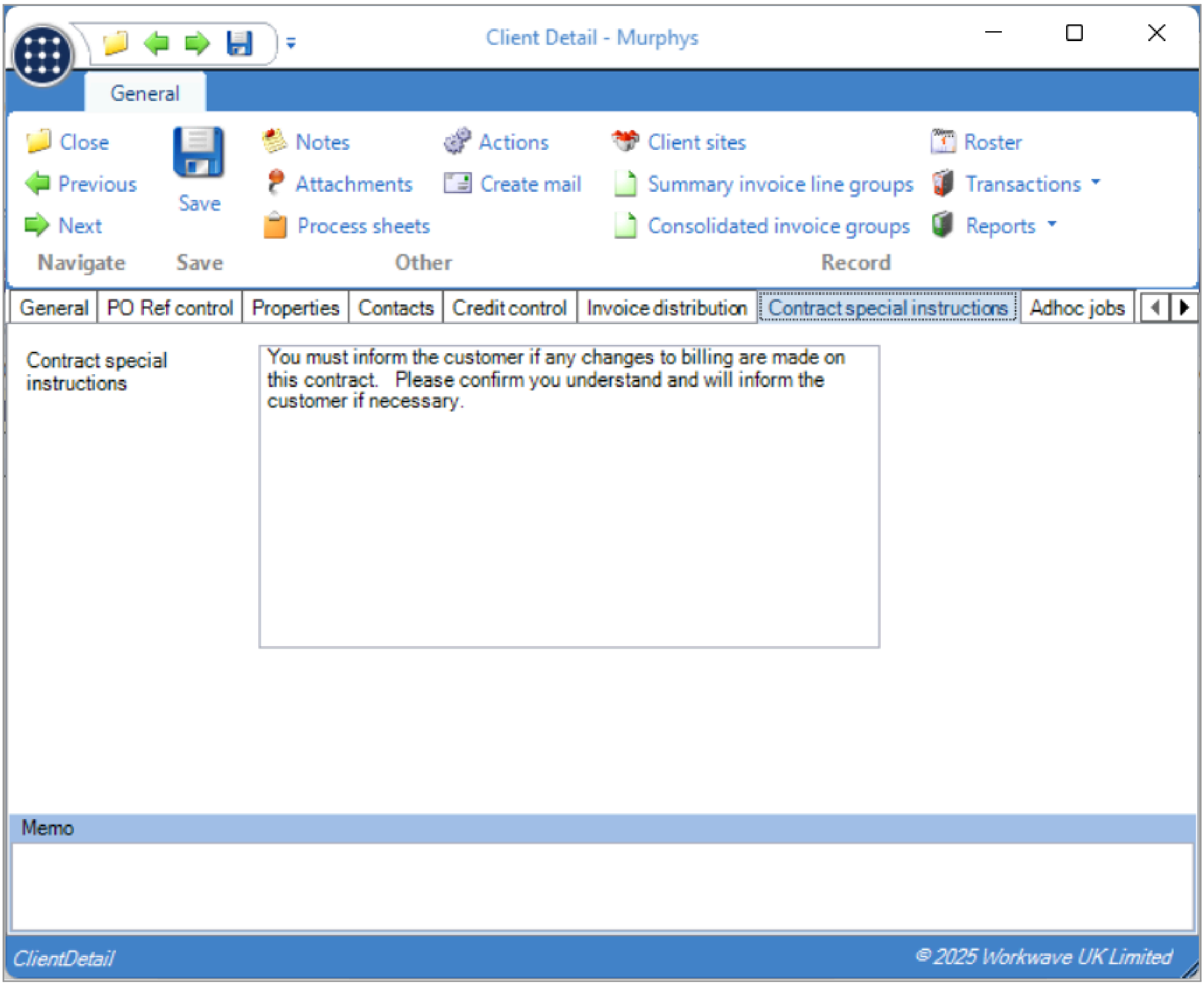
Contract Special Instructions

Background

Similar to the existing memo functionality that provides a pop-up window for client level notes when opening pay batches, a new contract special instructions field has been added to clients to show a pop-up window when creating or amending contracts for the client, with the requirement for the instructions to be acknowledged by the user.

Clients

A new tab has been added to clients for the Contract special instructions tab where any instructions can be entered.

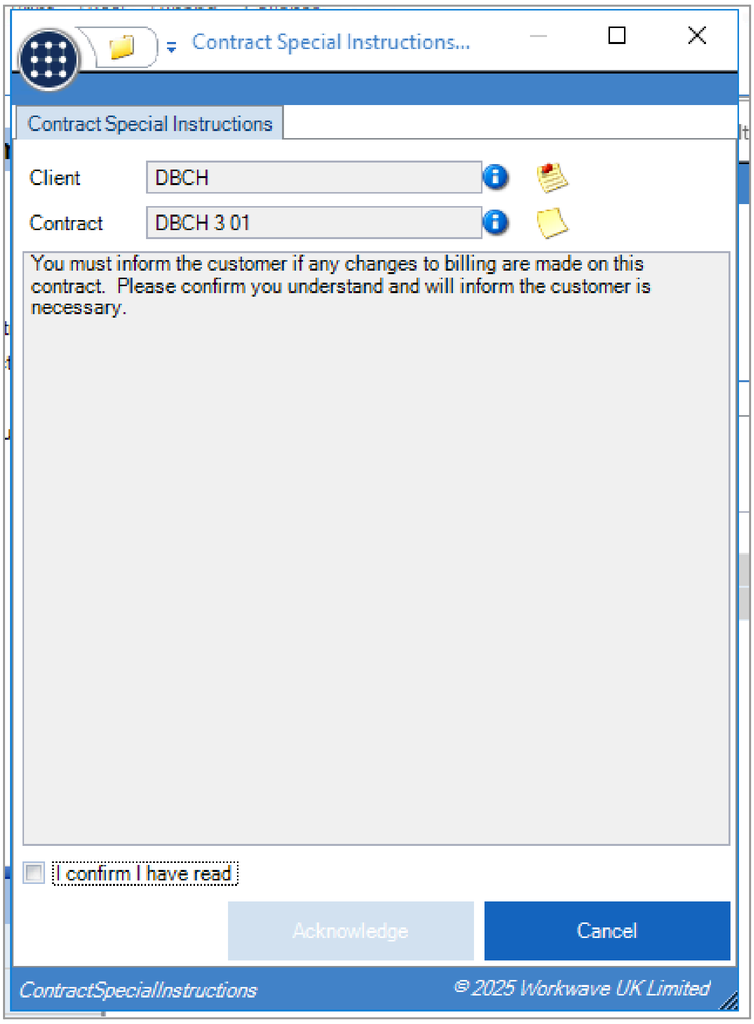


Access to the tab is secured by the following new functions:

- Client - Amend contract special instructions.
- Client - View contract special instructions.

Contracts

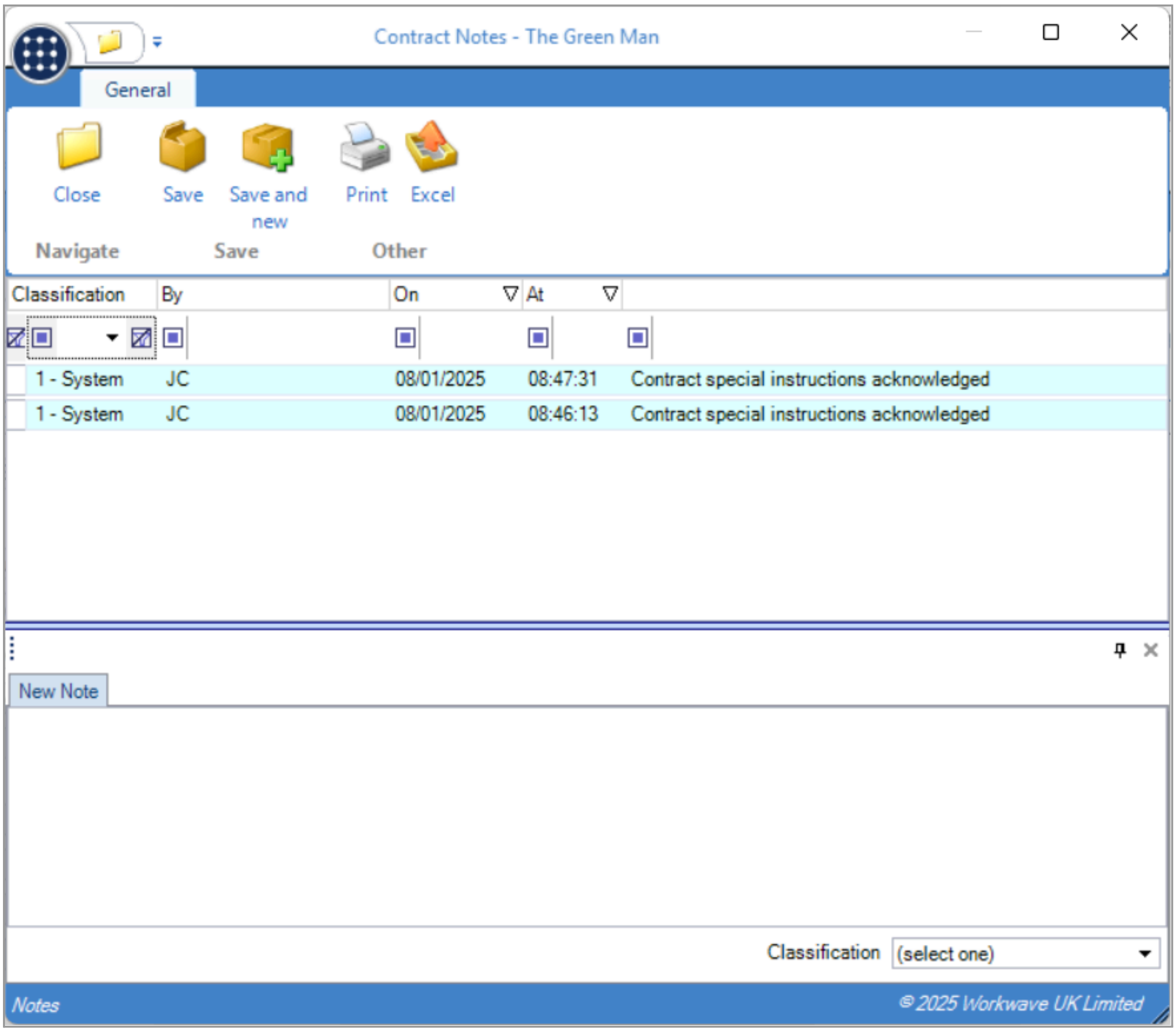
Where contract special instructions have been entered on a client, attempting to create, amend, or terminate a contract for the client displays a new pop-up window where the user must confirm they have read the message in order to continue.



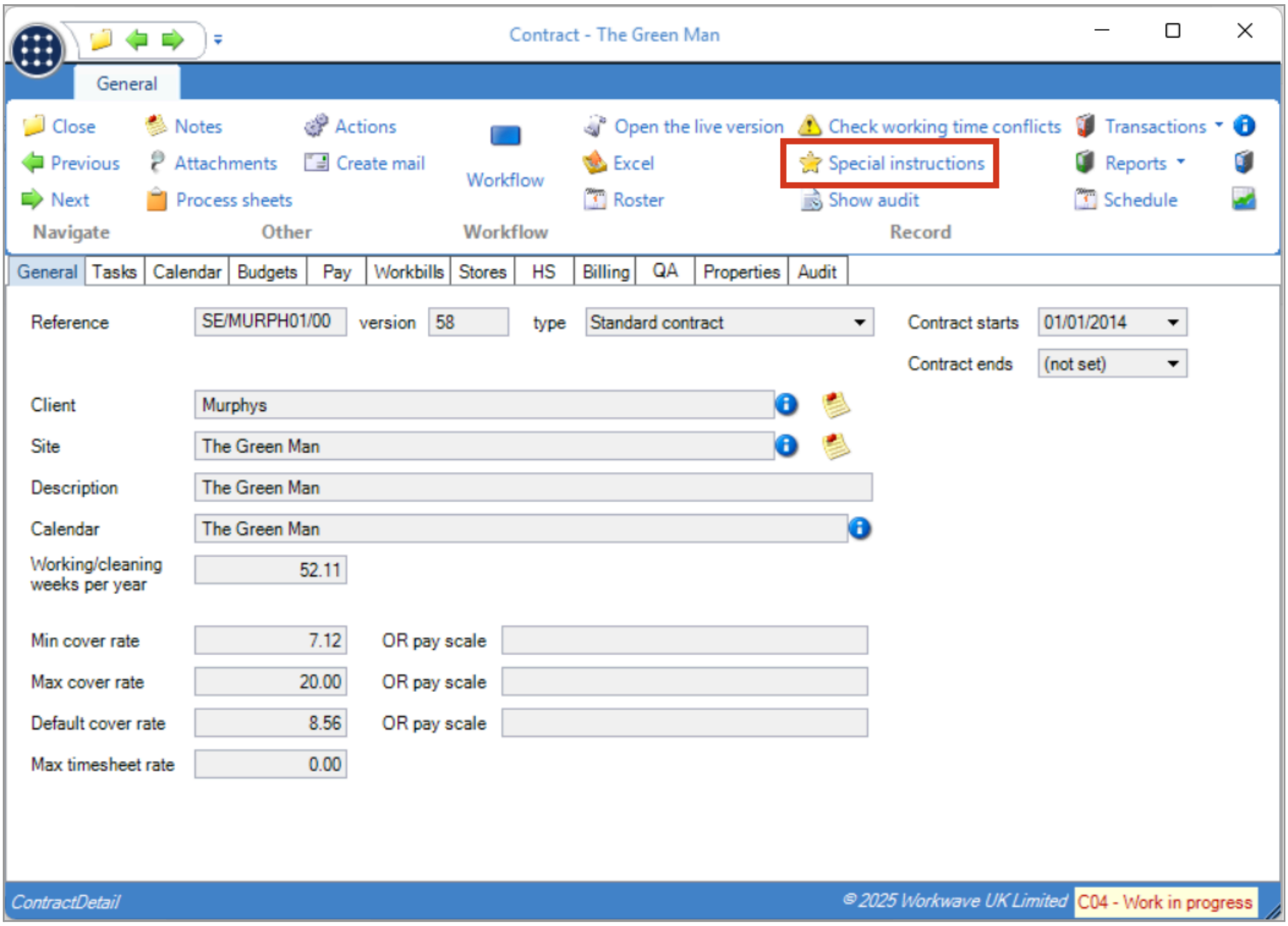
This occurs in the following circumstances:

- When entering or modifying the site on a new contract – Failing to acknowledge removes the entered client and site.
- When creating or opening a new version of a contract – Failing to acknowledge opens the contract in view mode only.
- When choosing the contract option to suspend, release, or terminate – Failing to acknowledge cancels the selected option.
- When rolling back a contract and choosing to send straight to workflow without amending – Failing to acknowledge cancels the rollback.
- When terminating multiple contracts from the list – Failing to acknowledge cancels the termination. Note that the pop-up window displays and must be acknowledged for every contract with a client with contract special instructions.
- When merging multiple contracts from the list – Failing to acknowledge cancels the merge. Note that the pop-up window displays and must be acknowledged for every contract with a client with contract special instructions.

When acknowledging contract special instructions, a note is added to the contract to confirm which user acknowledged and at what time.



On any contract where the client has contract special instructions, a new taskbar button provides access to the same contract special instructions pop-up window, but without the ability to acknowledge.



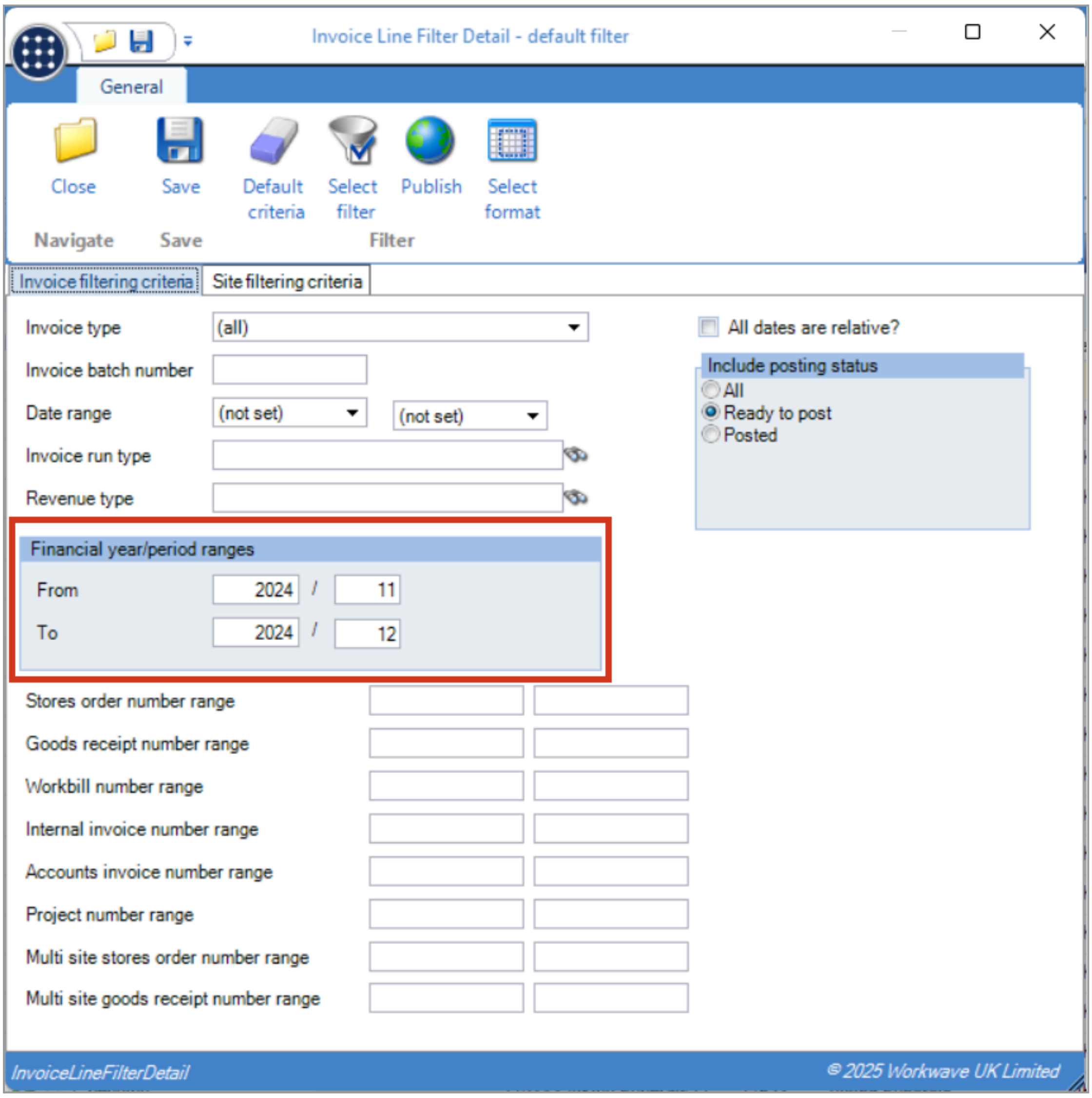
Invoice Line List – Financial Period Filtering

Background

The ability to filter the invoice line list by financial year and period has been added, bringing it in line with similar filtering on the purchase register.

Invoice Line List Filter

New options have been added to the Invoice line list filter to allow filtering by financial year and period from and to.



When a filterable invoice line list loads, it now takes into account any financial year and period filtering entered.

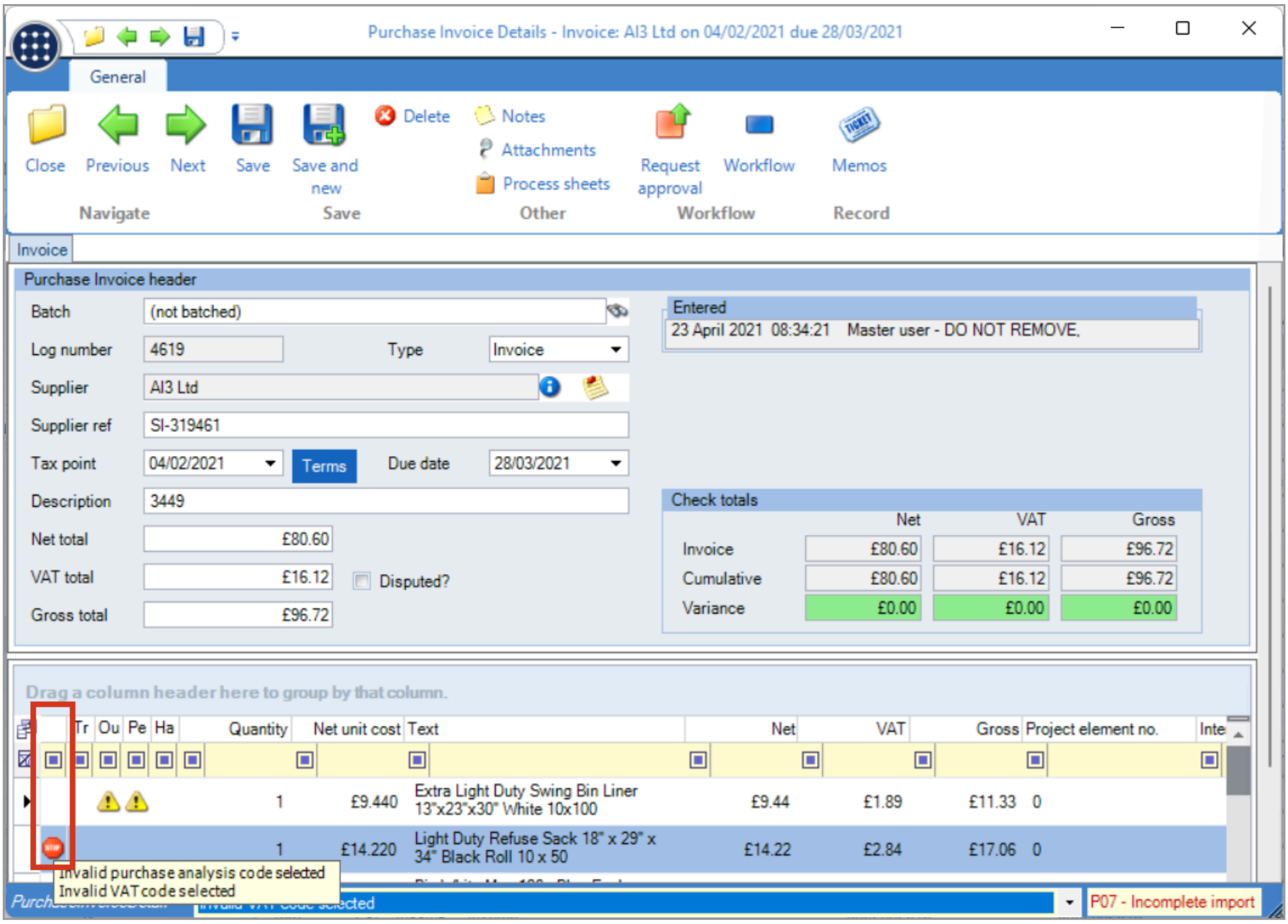
Purchase Invoice Import – Error Details

Background

When purchase invoice lines are imported, the lines may be accepted in error and the header put to a status of Incomplete import. To make it easier to identify which lines are in error, a new error column has been added to the lines grid on the purchase invoice.

Purchase Invoices

When a purchase invoice is at the status of Incomplete import, upon opening the purchase invoice, all lines are validated, and a new error column indicates which lines have any errors. The user can then scroll through the lines grid, or use the in grid filter to find all lines with an error.



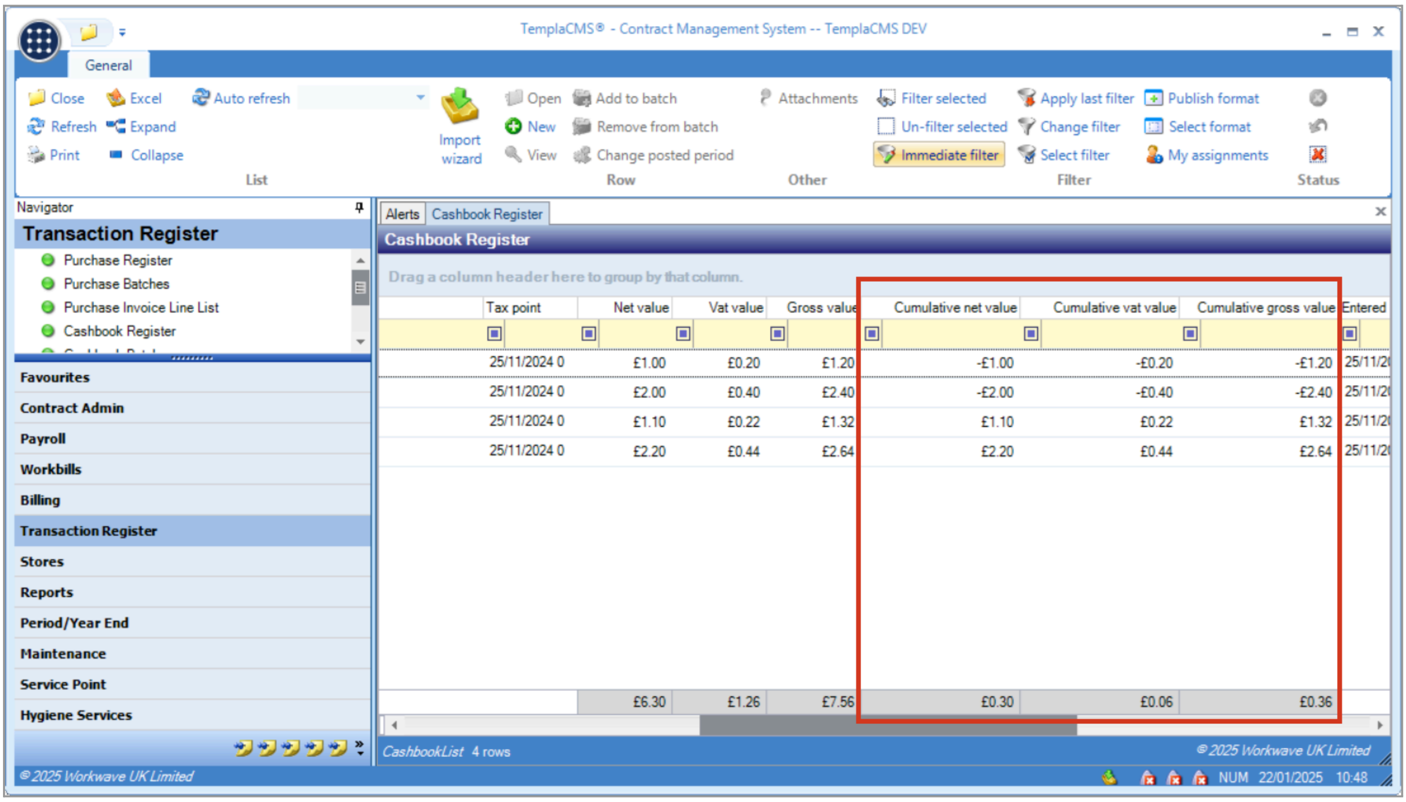
Cashbook Lists Cumulative Values

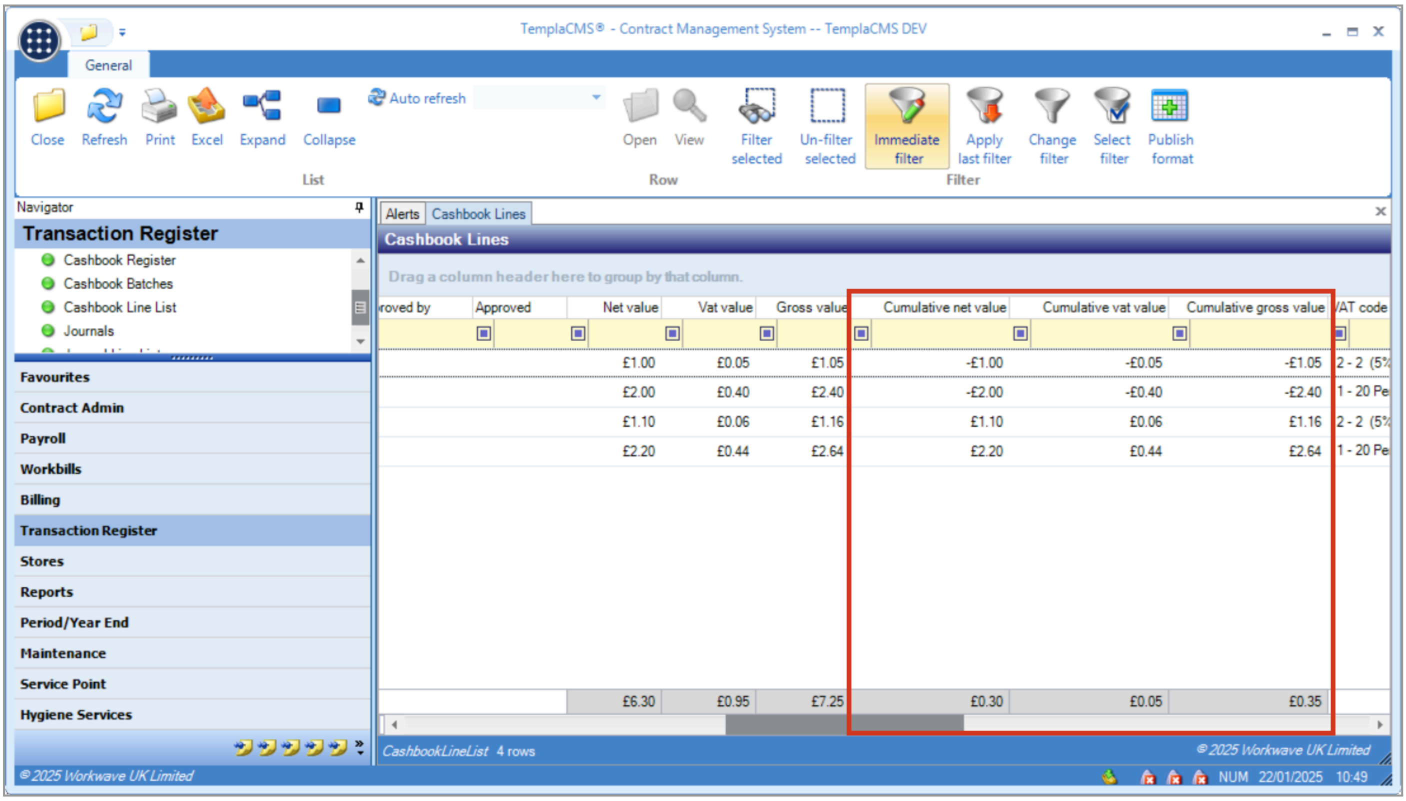
Background

A recent modification in the November 2024 update changed the way that cashbook batches handle net, vat, and gross totalling to sum payments minus receipts. New totals on the cashbook and cashbook line lists now allow the same totalling to be seen.

Cashbook Register and Cashbook Line Lists

A new set of columns for Cumulative net, vat, and gross value have been added to the cashbook register and cashbook line lists. Each new cumulative column matches the totalling done via the batch, with payments treated as positive, while receipts are negative.





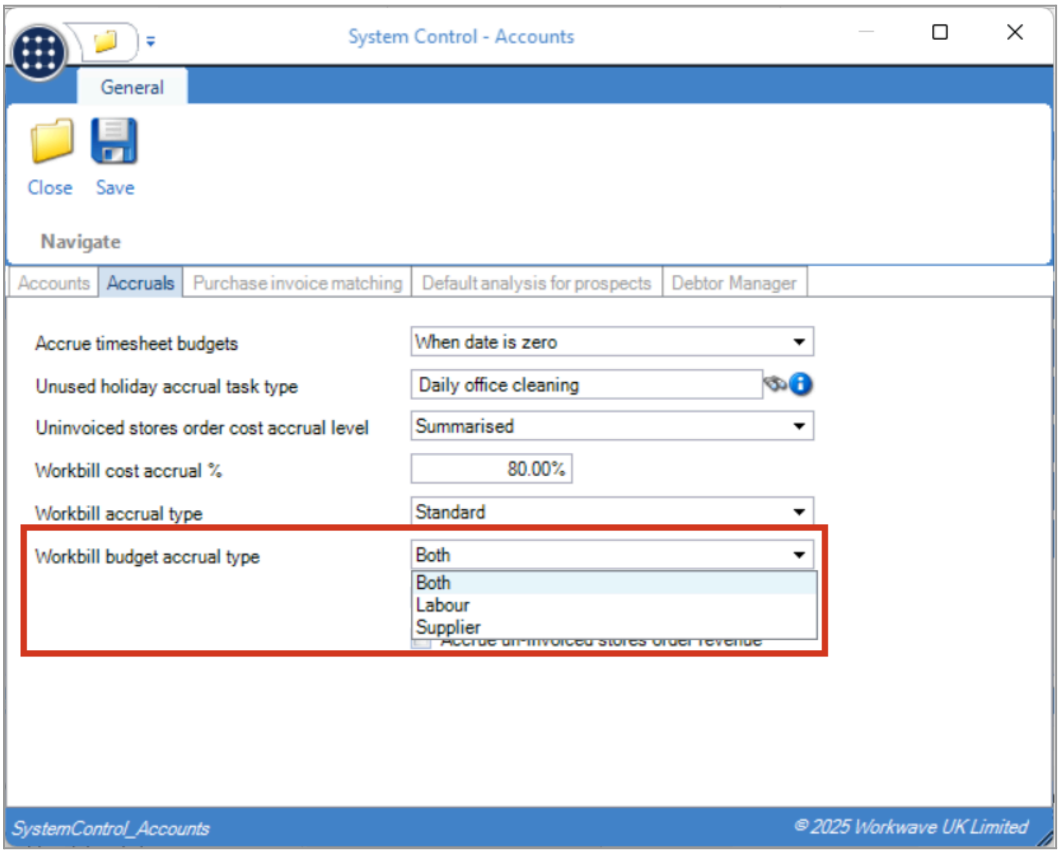
Workbill Cost Accrual Budget Type

Background

Previously, when generating workbill cost accruals, only the supplier budget had been considered. It is now possible to choose to also include labour budgets in these accruals.

System Control – Accounts

A new option is available on System Control – Accounts:



At installation time, this is defaulted to Supplier to preserve existing functionality.

Workbill Cost Accrual Generation

When workbill cost accrual batches are generated, the new Workbill budget accrual type is now taken into account and the relevant workbill budget is used for generation.

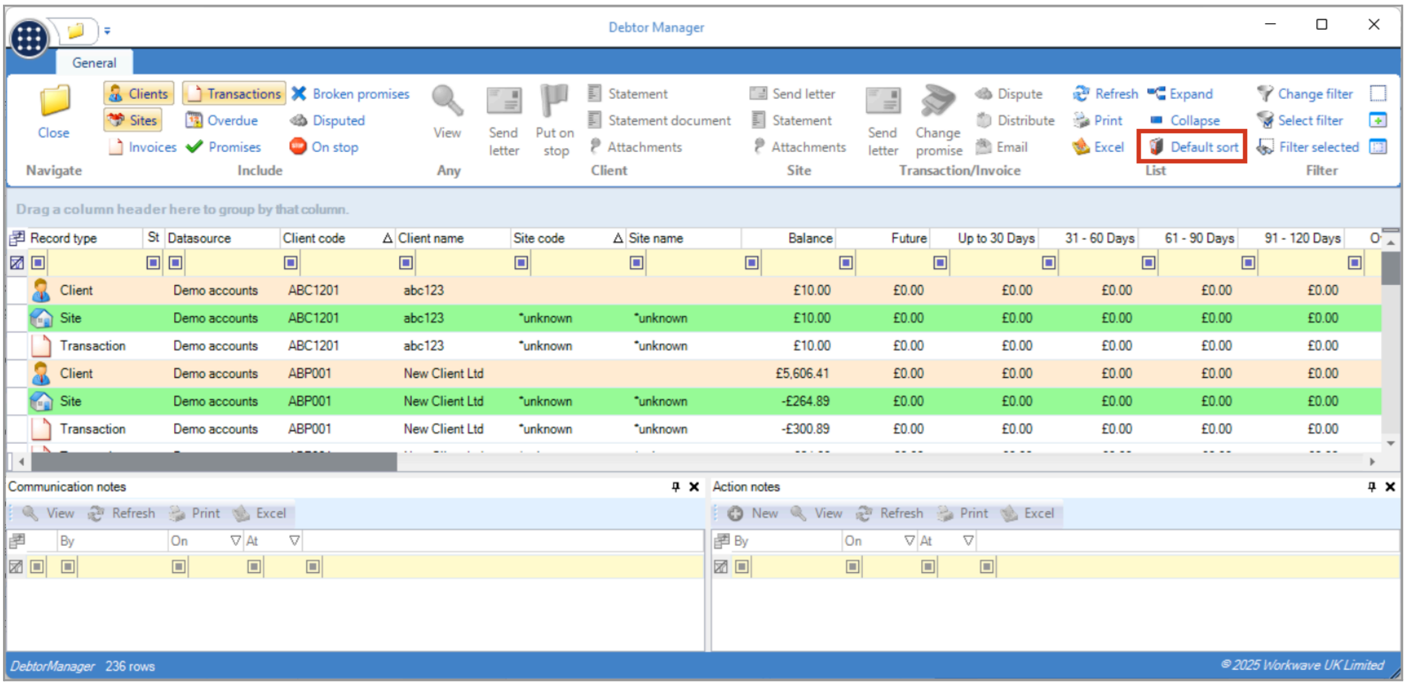
Debtor Manager Default Sort

Background

The debtor manager contains a number of informational columns, and when sorted, it can be difficult to resequence back into a usable order. A new default sort option has been added to the Debtor manager to allow easier sorting.

Debtor Manager

A new taskbar option has been added to the debtor manager for Default sort:



Selecting the default sort applies sorting by Client code, Site code, and Transaction date.

Billing Review – End Date

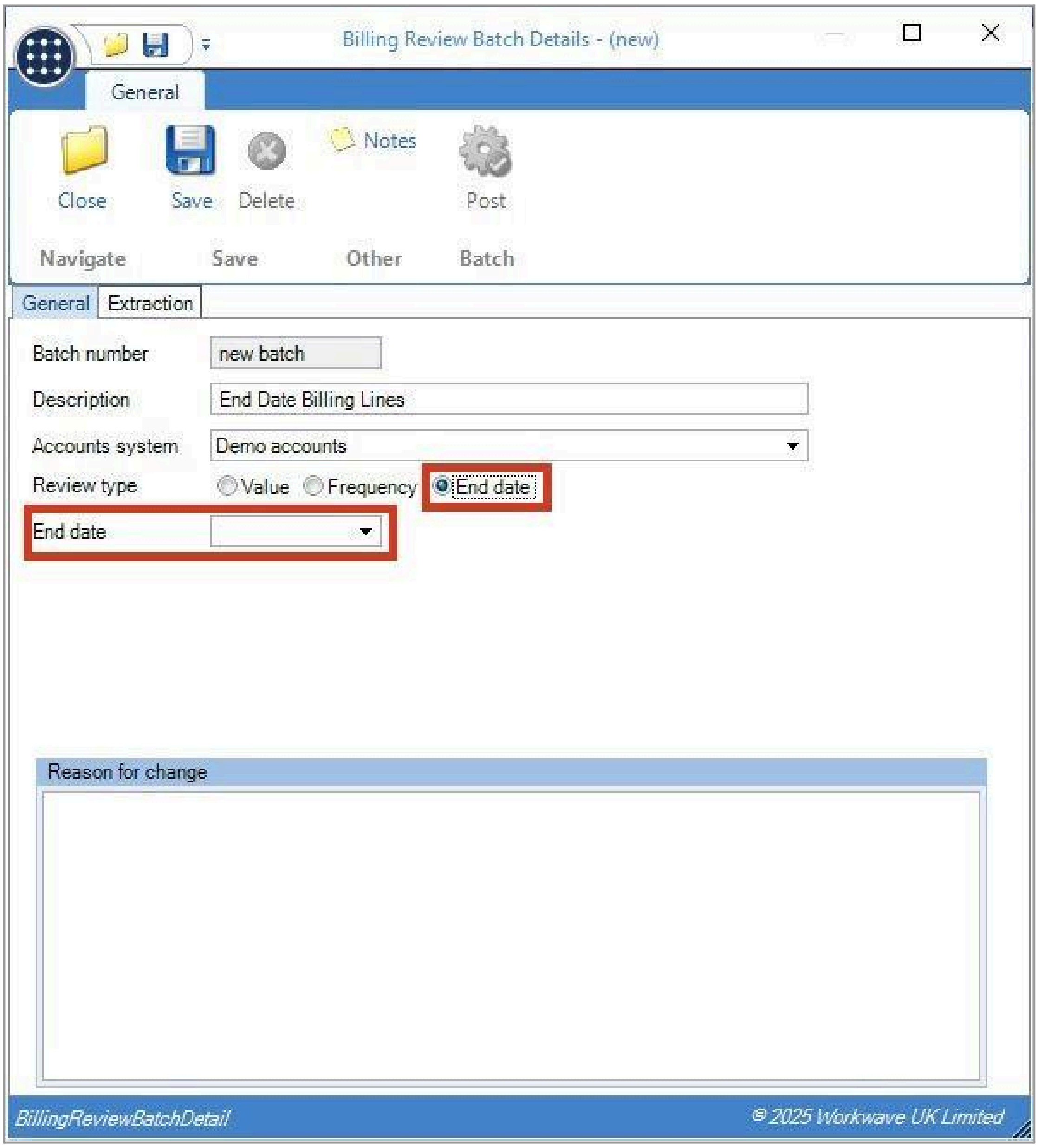
Background

The billing review batch process previously allowed an end date to be set. However, the process didnot allow just the end date to be set. This facility has now been introduced.

Billing Review

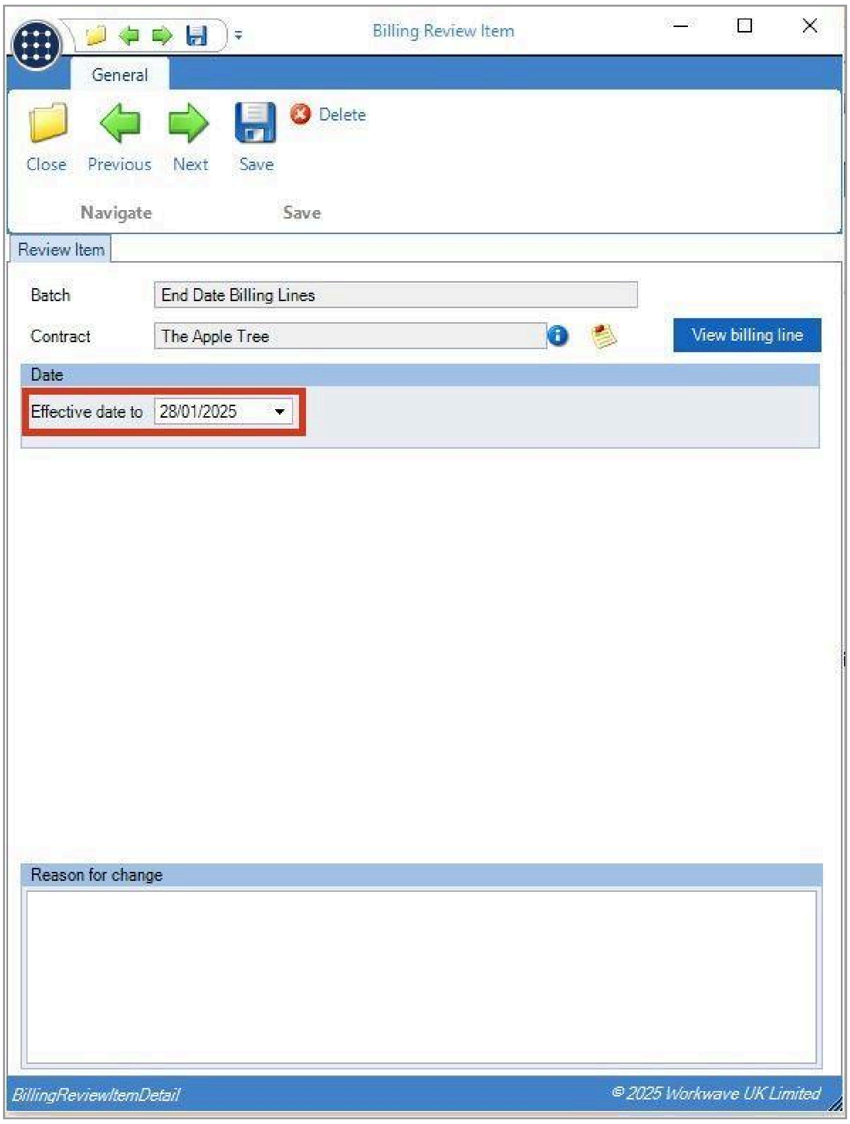
A new Review type of End date has been added to the billing review batch form.

When End date is selected, a new End date field is now available.



Billing Review Items

When the batch has completed generation and the review items have been created, billing review items can be deleted as now and can be opened and the “Effective date to” altered from that set by the batch End date.



On posting an End date Billing Review Batch, the existing billing lines are end-dated and no new billing lines are created.

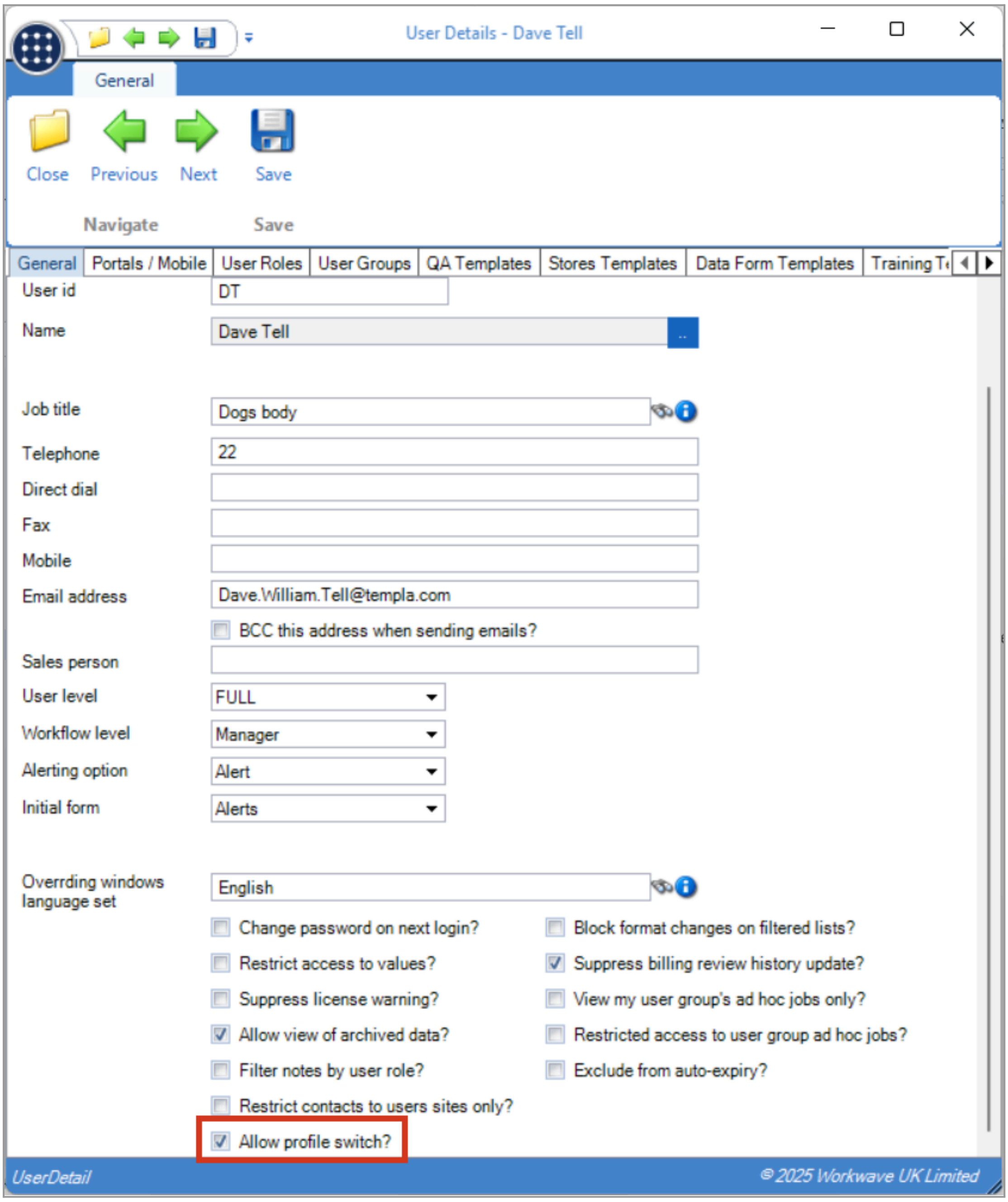
User Profile Switching

Background

The ability to switch between different user profiles has been added for users that share the same email address. This allows fast switching between users who may have different security levels associated with different companies within the database.

Users

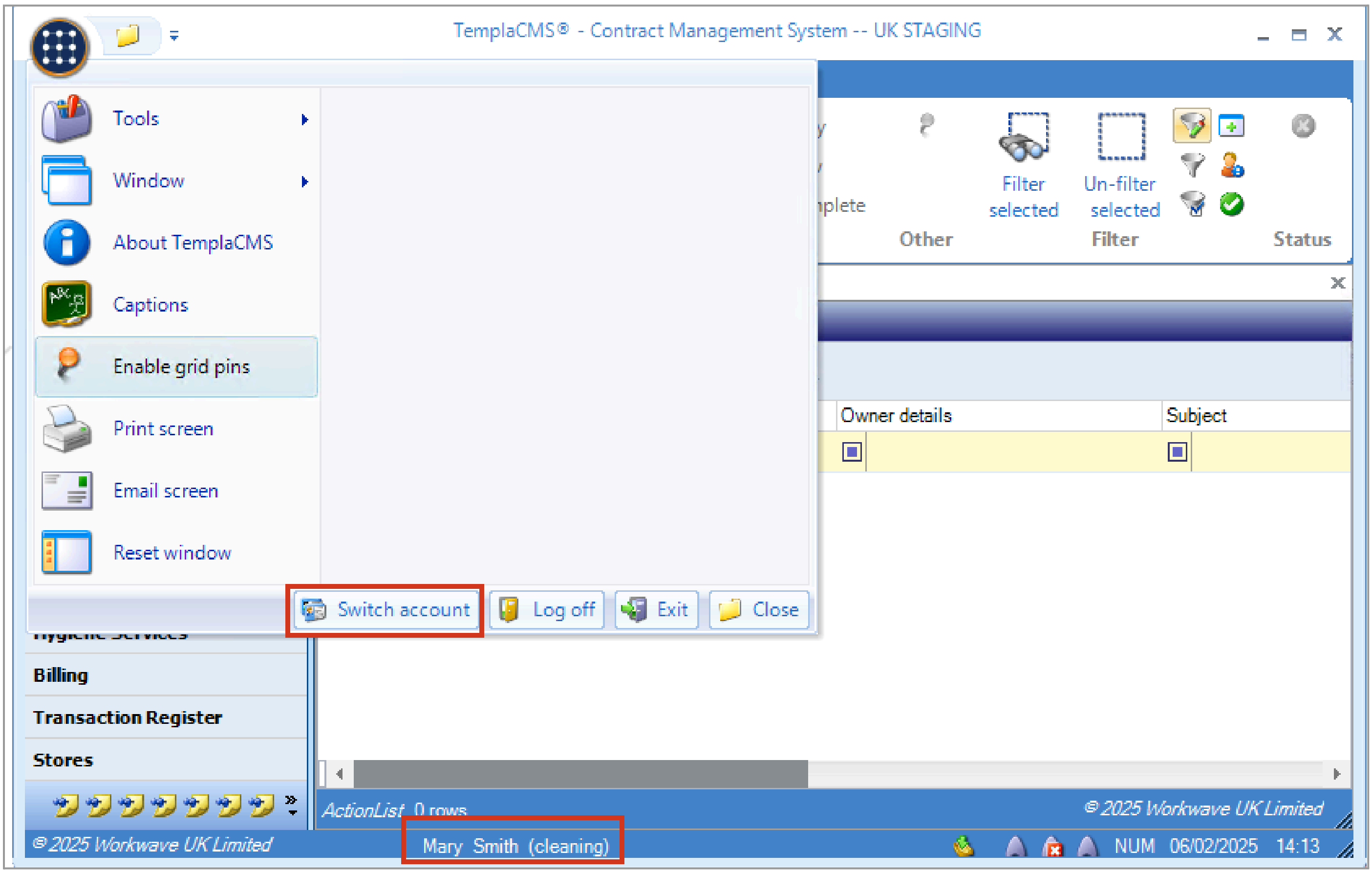
A new checkbox has been added to the General tab of users:



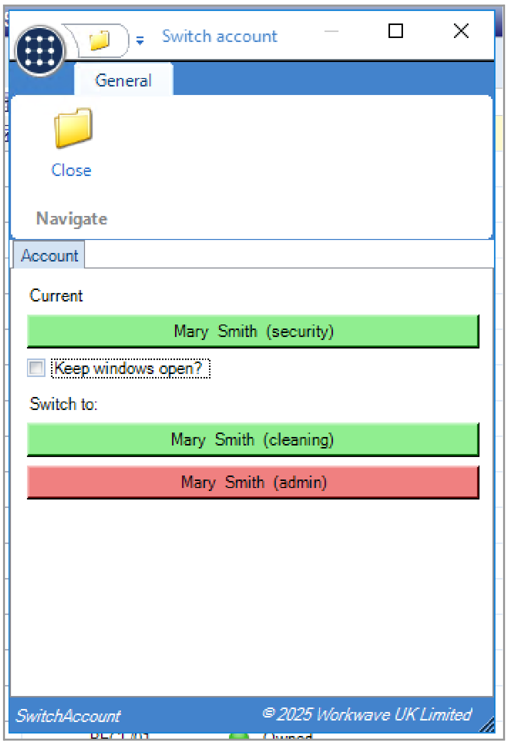
Selecting this checkbox allows this user to be either the source or target of a profile switch to another similarly flagged user with the same email address, as described below.

Profile Switching

When a user logs in with Allow profile switching enabled, a new Switch account option is available via the main TemplaCMS window icon (top left), or by double-clicking the user's name at the bottom of the screen.



Choosing to switch accounts brings up a new window showing the current user, a Keep windows open? checkbox, and a list of users to which the user can switch.



Each user is color-coded red or green based on whether a profile switch has previously been performed in this direction.

Log Off and On

When selecting the new user, if the user had previously signed on as the new user, the log off process takes place with the user prompted to save any changes to open windows. They are then automatically logged back in as the new user. If the user has not previously signed in as the new user, they are then prompted to enter the correct password. If logged in successfully, the next switch to the user is pre-authenticated.

Keep Windows Open

When keeping windows open, any list screen which was previously open reopens for the newly signed-in user, with the following caveats:

- If filterable, the reopened screen automatically applies the filter for the new user.
- The filter does not transfer from the previous user to the new user.

This may mean the list is different if the list is site based and the users have different restrictions

Any non-list window, e.g., a timesheet, prompts for save but does not reopen when signed in as the new user.

User Password Change

Should any user change their password, any pre-authenticated switches are automatically deleted. Thus, any user switching to this user needs to re-authenticate when changing to them.

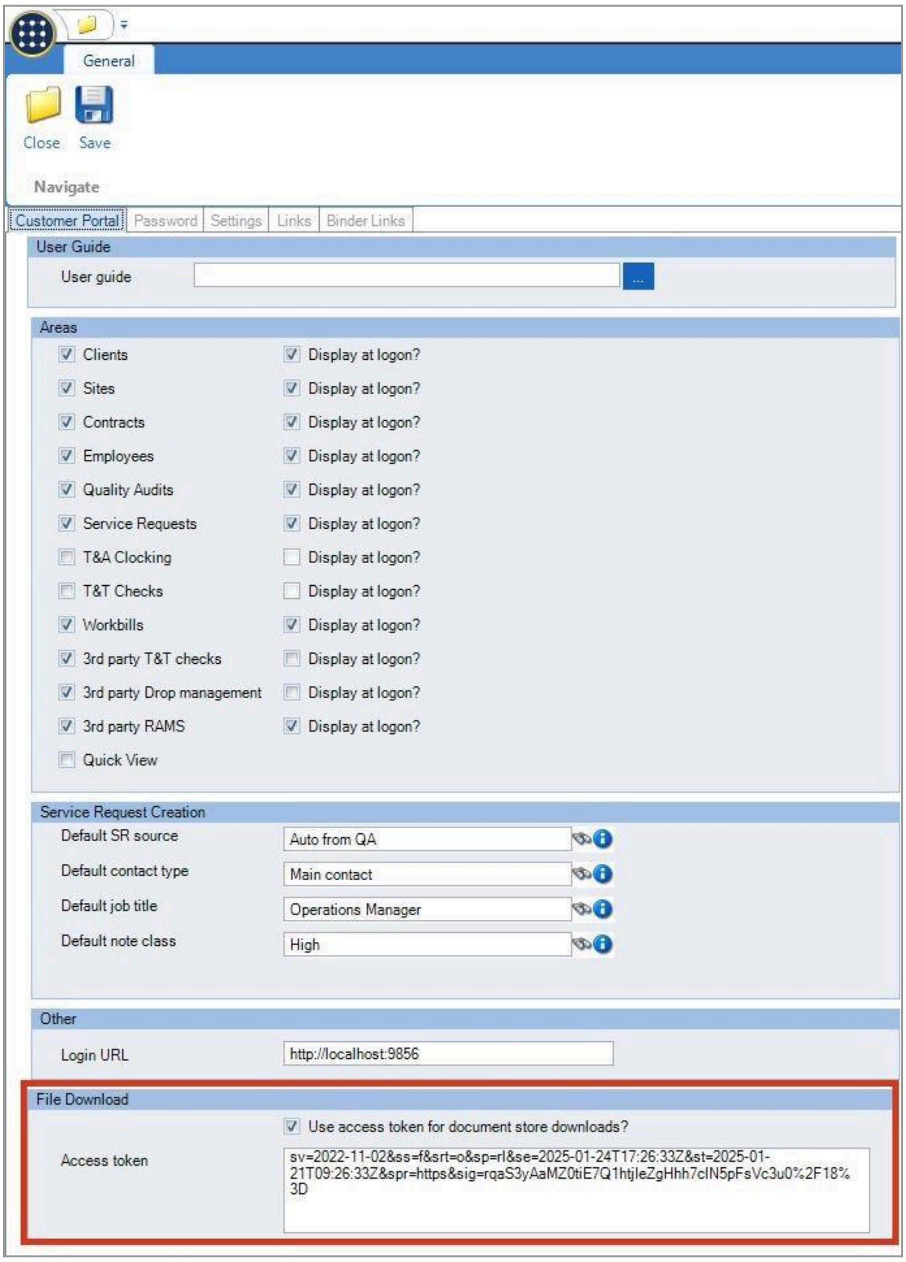
Customer Portal – Document Store Access

Background

When implemented in a hosted environment, it was previously not possible to download files from the TemplaCMS document store to Customer Portal. TemplaCMS and the Customer Portal have both been enhanced to allow the secure download of files within Customer Portal.

System Control

A new File Download section has been added to System Control – Customer Portal.



If an Access Token has been defined, this is used to download any hosted files from the document store on Customer Portal. No Customer Portal UI changes have been made.

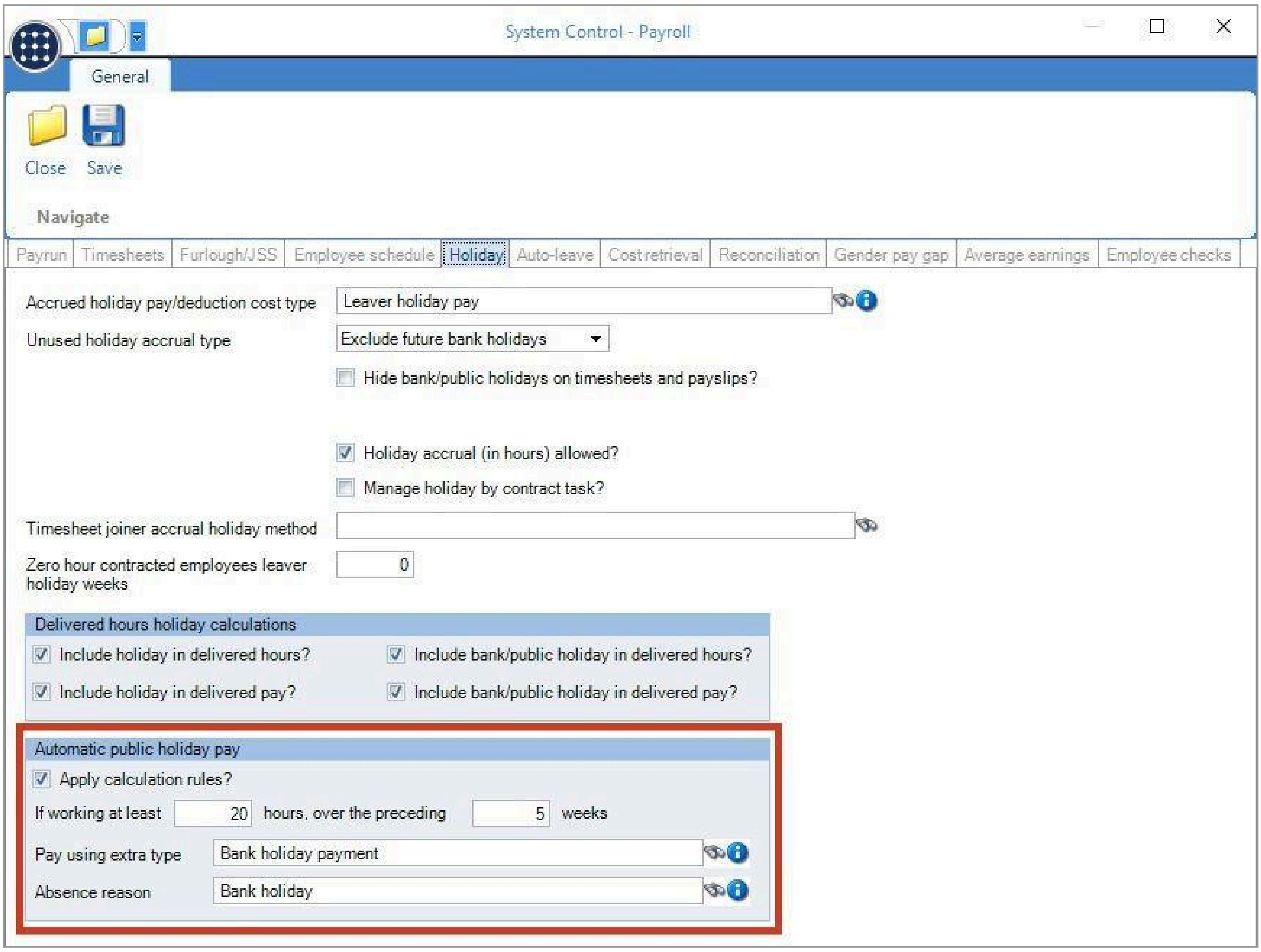
Public Holiday Calculations (Ireland)

Background

TemplaCMS had for many years automatically calculated public holiday payments for Ireland based on a set of complex rules that made it very hard to justify the payments. This process has now been simplified.

System Control - Payroll

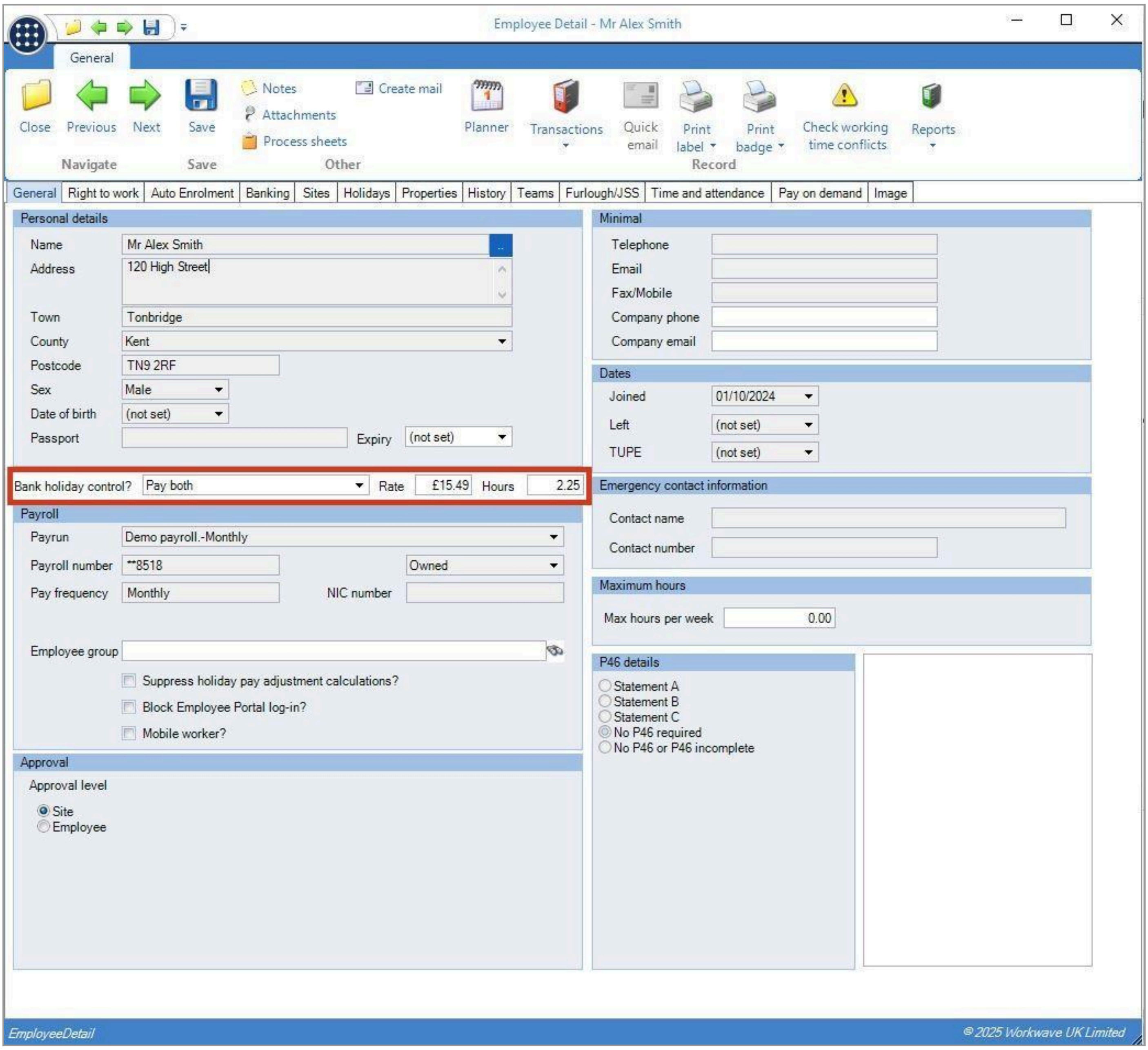
Some of the options used to calculate the employees public holiday payments have been removed to simplify the process. No new options have been added.



Employees

The Bank holiday control? options have been changed and now allow the following to be selected:

- None
- Pay contracted hours and rate
- Pay fixed hours and rate
- Pay both



If either “Pay fixed hours and rate” or “Pay both” are selected, two new controls are made available for entry of Rate and Hours.

Public Holiday Calculations

Whenever a change is made to a timesheet and is saved, the automatic public holiday calculation is carried out.

Depending on the Bank holiday control settings defined on the employee (See above section), the calculation is as follows:

- Pay contracted – One extra is added per public holiday date for the employee contracted hours, and contracted rate.

  Example: If an employee is contracted to work 8 hours at £12, an extra is added for that day of £96.

- Pay fixed – One extra is added per public holiday date for fixed hours, and fixed rate as defined on the employee (See above section) based on proportion of this site to all sites.

  Example: If an employee is contracted to work on two sites for 3 hours each and the employee has 8 fixed hours defined with a fixed rate of £12, an extra is added to each of the employees timesheets, one for 4 hours at £12 an hour and the other for 4 hours at £12 an hour, giving a total of £96 but spread evenly across both site timesheets.

- Both – Adds 2 extras per public holiday date to each timesheet employee, as per above .

Australian Awards – Paid/Unpaid Breaks

Note: This modification is only relevant to Australian Awards Interpretation.

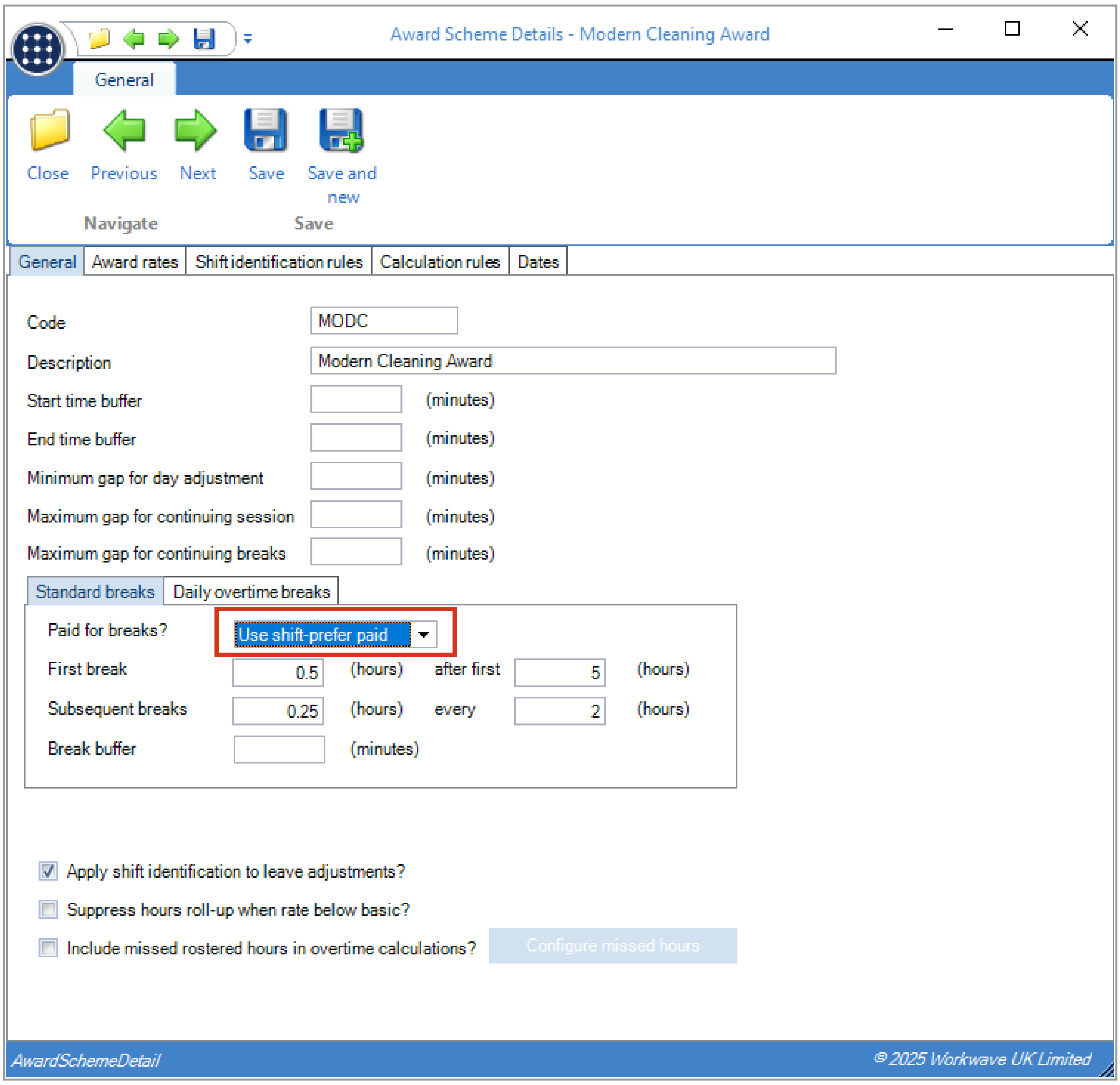
Background

On an Award Scheme, TemplaCMS allows the user to define the frequency of breaks, and whether they are paid or unpaid. Often, this is set to Use Shift, meaning that the payable nature of the break is determined based on the shift into which it falls.

A requirement has been identified to allow for all breaks in a working session to be forced to be paid, if the employee works any part of that session in a shift where breaks would be paid.

Award Scheme Details

A new option has been added to the Paid for breaks? setting of the award scheme.



Awards Interpretation

The awards interpretation process used in the contract budget roster and in the timesheet now take this new option into account.

Where a working session spans more than one shift and one of those shifts requires breaks to be paid, or there are paid overtime breaks (see later) in the session, all breaks assigned to the session become paid. This happens regardless of whether breaks are actually plotted into the shift that requires paid breaks.

Australian Awards – Daily Overtime Breaks

Note: This modification is only relevant to Australian Awards Interpretation.

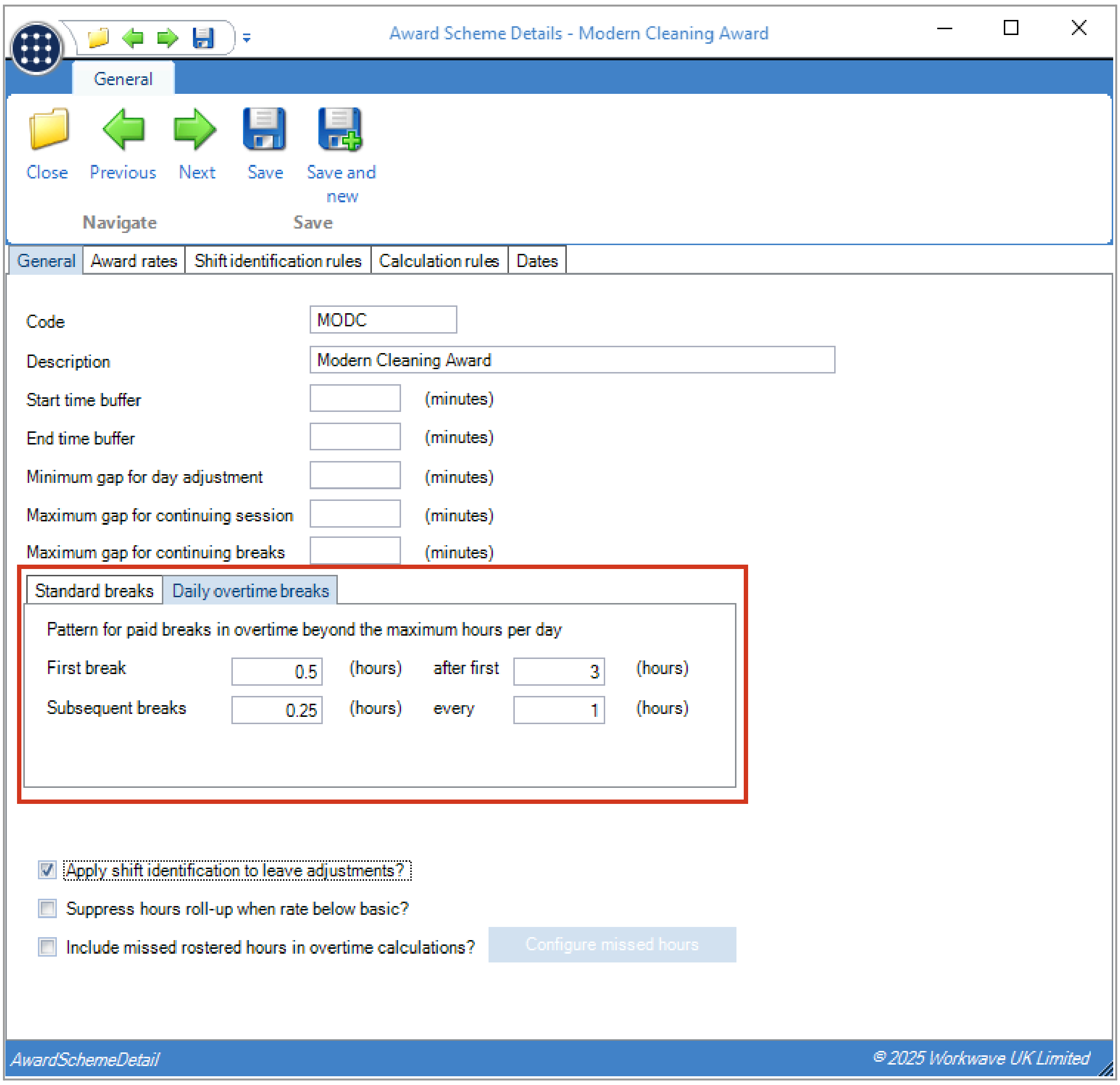
Background

On an Award Scheme, TemplaCMS allows the user to define the frequency of breaks.

A requirement has been identified to allow for the pattern of breaks to be changed as soon as the employee exceeds the maximum hours per day and therefore crosses into daily overtime.

Award Scheme Details

A new tab has been added to allow the definition of Daily overtime breaks on the award scheme.



As with standard breaks, this allows the first and subsequent breaks to differ. However, all breaks within daily overtime will implicitly be paid.

Awards Interpretation

During timesheet awards interpretation, the point at which an employee crosses over into daily overtime (i.e., after 7.6 hours of work) is now determined, and beyond this time the daily overtime breaks pattern take effect. Note that where an employee works multiple sites and/or multiple sessions per day, the cutover to the overtime pattern is calculated as 7.6 hours from the start of the earliest session, adjusted so that it falls within a working session.

Australian Awards – HR3Pay Export

Note: This modification is only relevant to Australian Awards Interpretation.

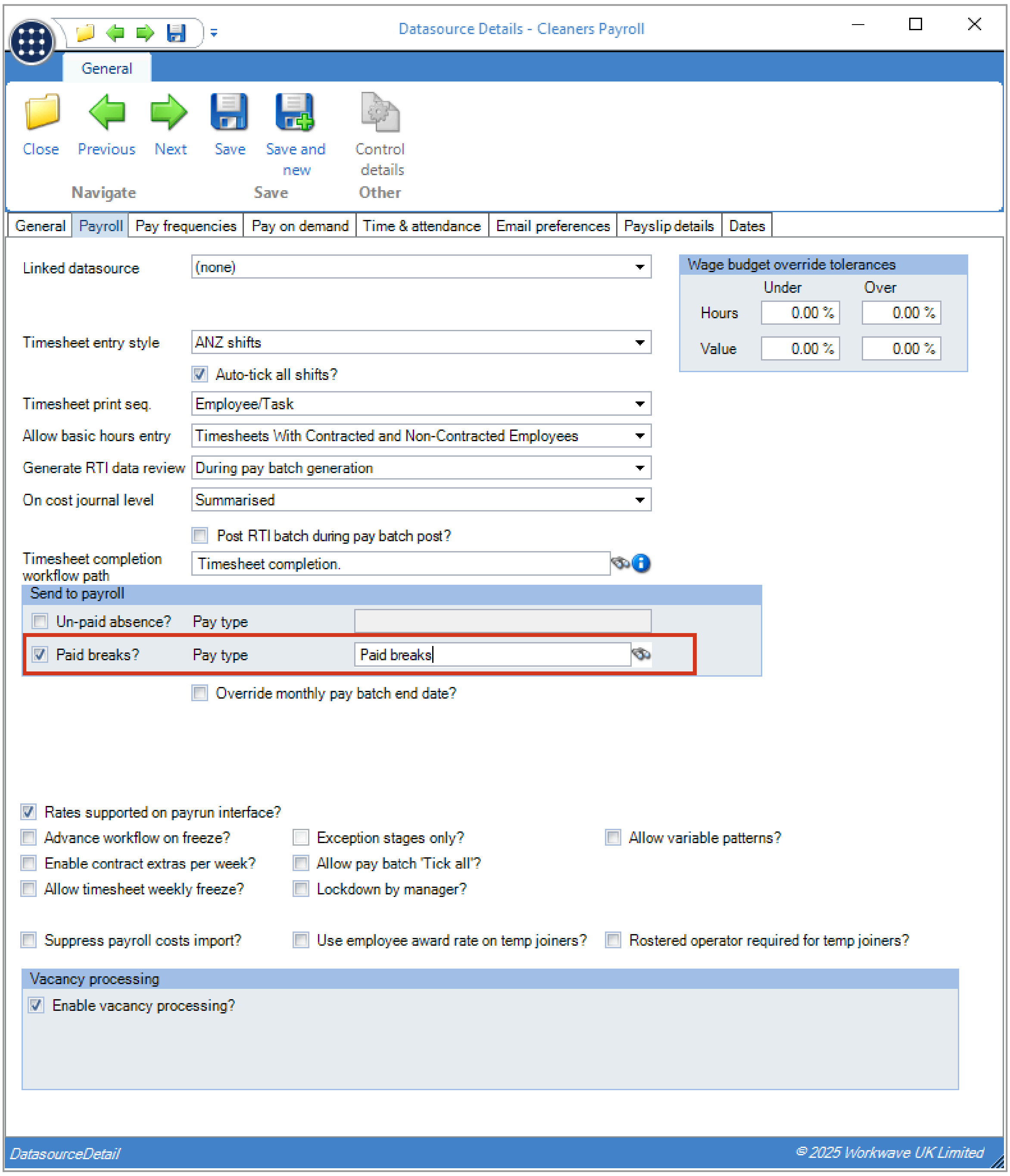
Background

The Awards Interpretation process can result in a mix of paid and unpaid breaks across the working sessions in the pay period. Unpaid breaks clearly reduce the amount of pay under the relevant pay type for the shift in which they occur, whereas paid breaks do not. There has historically been no information passed to the payroll to quantify the hours of paid breaks the employee should have received.

In order to reduce queries on the payroll department, it is now possible to pass paid break information to HR3Pay.

Datasource Details

On a payroll datasource connected to HR3Pay, new options have been added to enable the send of paid breaks to payroll.



If the new Paid breaks checkbox is selected, then a pay type must be specified, as all data exported to HR3Pay must relate to a pay type.

Pay Batch Post

During pay batch post, the payroll export file is created. Based on the above new settings, the sum total of paid breaks for each employee is included in the file, where each identifies the pay type, number of hours of paid breaks, and a zero pay rate (as the pay is included in the other pay types).

Log Numbers

This enhancement update contains the following log numbers:

WI4509

WI4510

WI4774

WI4850

WI4866

WI4867

WI4896

WI4905

WI4955

WI5017

WI5018

WI5019

WI5020

WI5151

TEAM Software

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