

# **TemplaCMS** Newsletter

V6.1.0 | Update 2025.01 | January 2025

# **COMMERCIAL STATEMENT**

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# TABLE OF CONTENTS

Introduction	5
Training	5
Roster Manager – Swap with No Cover	6
Background	6
Roster Manager Swap	6
Roster Manager – Multi-Toggle	7
Background	7
Roster Manager	7
Contract Special Instructions	8
Background	8
Clients	8
Contracts	9
Invoice Line List – Financial Period Filtering	
Background	
Invoice Line List Filter	
Purchase Invoice Import - Error Details	
Background	
Purchase Invoices	
Cashbook Lists Cumulative Values	
Background	
Cashbook Register and Cashbook Line Lists	14
Workbill Cost Accrual Budget Type	16
Background	
System Control – Accounts	
Workbill Cost Accrual Generation	
Debtor Manager Default Sort	
Background	
Debtor Manager	
BILLING REVIEW - END DATE	18
Background	
Billing Review	
Billing Review Items	
User Profile Switching	20
Background	
Users	
Profile Switching	
CUSTOMER PORTAL - DOCUMENT STORE ACCESS	23
Background	
System Control	23
Public Holiday Calculations (Ireland)	
Background	
System Control - Payroll	24
Employees	25

Public Holiday Calculations	
Australian Awards – Paid/Unpaid Breaks	27
Background	27
Award Scheme Details	27
Awards Interpretation	
Australian Awards – Daily Overtime Breaks	29
Background	29
Award Scheme Details	29
Awards Interpretation	29
Australian Awards – HR3Pay Export	
Background	
Datasource Details	
Pay Batch Post	
Log Numbers	

#### 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:

	Roster Manager Swap
Swap	
Missing	**8253 - Eric Smith *
Site	SE/MURPH01/003 - The Indigo Man. : 3 – Daily office cleaning – Daily office cleaning - CLEANER - Cleaner
Date range	09/12/2024 ▼ To 12/12/2024 ▼ ✓ Holiday? ✓ Absent?
Covering Cover rate	£0.00
	OK Cancel
RosterManagerSw	rapPopUp © 2025 Workwave UK Limited

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:

· 🔐 😕 🗧		Roster Manager	- 🗆 X
General Close Refresh Excel Navigate	Change Select filter Filter	Save changes Save Save	Enclose view     Check time     Check time     Conflicts     Conflicts     Other
Roster manager		Event	
ucEmployees			
ucEmployees	oyees 📲 Rank for : The Indigo Man.		
ucEmployees	oyees 💐 Rank for : The Indigo Man.	Post code	
ucEmployees Q All authorized empl Payroll number D D Z D	oyees 📲 Rank for : The Indigo Man. Name	Post code	
ucEmployees All authorized employ Payroll number 2 D 200000	oyees 📲 Rank for : The Indigo Man. Name Tai Karren Balshoi	Post code	

# **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.

		)∓ Con	tract S	Special In:	struction	S	_		×
	Contract Spec	cial Instruc	tions						
l	Client	DBCH				0	1		
	Contract	DBCH 3	01			0	5		
b 1	You must info contract. Ple necessary.	orm the cu ase confir	stome m you	r if any cha i understar	anges to l nd and wil	billing ar II inform	e made the cust	on this omer is	
L									-
	🔲   confirm	have read	IJ						
							c	ancel	
	ContractSpecie	allnstructi	ons			@ <i>2025</i>	Workwa	ve UK L	imited

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.

	) =		С	ontract Not	tes - T	The Green	Man			×
Gen	eral									
	6	<b>i</b>		<b>1</b>						
Close	Save	Save and new	Print	Excel						
Navigate		Save	0	ther						
Classification	By			On	$\nabla$	At ⊽	7			
<b>Z</b> 🔳 🔹 🛛	1				[					
1 - System	JC			08/01/2025	(	08:47:31	Contract special instructions ackr	owledged		
1 - System	JC			08/01/2025	(	08:46:13	Contract special instructions ackr	owledged		
:										<b>4</b> ×
New Note										
							<b>e a a b</b>			
							Classification (s	elect one)		-
Notes								2025 Work	wave UK I	Limited

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.

	)=		Contrac	tt - The Green I	Man			_		×
General										
<ul> <li>✓ Close</li> <li>♦ No</li> <li>♦ Previous</li> <li>♦ At</li> <li>♦ Next</li> <li>● Pr</li> <li>Navigate</li> </ul>	otes 2 Ac tachments 2 Cr ocess sheets Other	tions eate mail Wor	kflow kflow	<ul> <li>Open the</li> <li>Excel</li> <li>Roster</li> </ul>	e live version	🔔 Check	working time conf I instructions audit Record	licts 🥥 Trans 🗊 Repo 🔝 Sche	sactions orts 🔻 dule	- () () ()
General Tasks Cale	ndar Budgets Pay	Workbills Store	s HS	Billing QA	Properties	Audit				
Reference	SE/MURPH01/00	version 58	type	Standard cor	ntract	•	Contract starts	01/01/2014	•	
							Contract ends	(not set)	•	
Client	Murphys					3 🛸				
Site	The Green Man					3 🛸				
Description	The Green Man									
Calendar	The Green Man					0				
Working/cleaning weeks per year	52.11									
Min cover rate	7.12	OR pay scale								
Max cover rate	20.00	OR pay scale								
Default cover rate	8.56	OR pay scale								
Max timesheet rate	0.00									
ContractDetail						@ 20.	25 Workwave UK Lii	mited C04 - We	ork in pro	ogress

# 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.

	<b>⊋</b> Invo	pice Line Filter D	etail - default filter	_		×
General						
📁 🎚	] 🥥 🕈	🖌 🌖				
Close Sa	ve Default Se criteria fi	elect Publish ilter	Select format			
Navigate Sa	ve	Filter				
Invoice filtering crite	ia Site filtering criter	ria				
Invoice type	(all)		•	All dates are relative?		
Invoice batch numb	er			Include posting status		h
Date range	(not set)	<ul> <li>(not set)</li> </ul>	•	Ready to post		
Invoice run type			B	Posted		
Revenue type			S			
Financial year/peri	od ranges					
From	2024 /	11				
То	2024 /	12				
Stores order number	r range					
Goods receipt num	ber range					
Workbill number ra	ige					
Internal invoice nur	ber range					
Accounts invoice n	imber range					
Project number ran	je					
Multi site stores or	er number range					
Multi site goods red	eipt number range					
InvoiceLineFilterDeta				© 2025 Works	wave UK Li	mited

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.

🗰 🎾 🗢 🖶 🕫	Purchase Invoice Details - Invoice: Al3	Ltd on 04/02/2021 due	28/03/2021		— C	x u
General						
Close Previous Next Save Save and new Navigate Save	Oelete     ○ Notes     P Attachments     Rd     ■ Process sheets     ap     ■ Other	equest Workflow proval Workflow	Memos Record			
Invoice Purchase Invoice header						
Batch (not batched) Log number 4619	Type Invoice •	Entered 23 April 2021 08:34:2	1 Master user - [	DO NOT REMOVE.		
Supplier Al3 Ltd	0 🛸					
Supplier ref SI-319461						
Tax point 04/02/2021 ▼ Terms	Due date 28/03/2021 -					
Description 3449		Check totals	Net	VAT	Gross	
Net total £80.60		Invoice	£80.60	£16.12	£96.72	
VAT total £16.12	Disputed?	Cumulative	£80.60	£16.12	£96.72	
Gross total £96.72		Variance	£0.00	£0.00	£0.00	
Drag a column header here to group by t	hat column.					
Tr Ou Pe Ha Quantity Net un	it cost Text	Net	VAT	Gross Project	element no.	Inte
▶ <u>1</u> 1 £	9.440 Extra Light Duty Swing Bin Liner 13"x23"x30" White 10x100	£9.44	£1.89	£11.33 0		
1 £1	4.220 Light Duty Refuse Sack 18" x 29" x 34" Black Roll 10 x 50	£14.22	£2.84	£17.06 0		
Purch Invalid VAT code selected	ed			•	P07 - Incompl	ete import

# 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.

		TemplaCMS	B - Contract Man	agement Sys	tem Templ	aCMS DEV			_	= x
General										
📁 📁 Close 🔹 Excel 🛛 🖓 Auto refresh	- 🔥	🗐 Open  🍘	Add to batch	21	Attachments		😵 Apply last filter	💽 Publish format	0	
🤁 Refresh 📲 Expand	<b>~</b>	🔂 New 🇯	Remove from bat	ch		Un-filter selected	🌱 Change filter	🔝 Select format	3	
🝰 Print 💻 Collapse	Import wizard	🔍 View 🔹	Change posted p	eriod		💱 Immediate filter	Select filter	🔒 My assignments	2	
List			Row		Other		Filter		Status	
Navigator	Alerts Cashbook R	egister								х
Transaction Register	Cashbook Regis	ster								
Purchase Register		and as have to	annun hutbat a	luna						
Purchase Batches	Drag a column n	leader nere to	group by that ca	piumn.						
Purchase Invoice Line List		x point	Net value	Vat value	Gross value	Cumulative net value	e Cumulative va	t value Cumulative gr	oss value	Entered
				L						
Favourites	25	/11/2024 0	£1.00	£0.20	£1.20	-£1.00		-£0.20	-£1.20	25/11/20
Contract Admin	25	/11/2024 0	£2.00	£0.40	£2.40	-£2.00		-£0.40	-£2.40	25/11/20
Pavroll	25	/11/2024 0	£1.10	£0.22	£1.32	£1.10		£0.22	£1.32	25/11/20
	25	/11/2024 0	£2.20	£0.44	£2.64	£2.20		£0.44	£2.64	25/11/20
workbills	_									
Billing										
Transaction Register										
Stores										
Reports										
Period/Year End										
Maintenance										
Service Point										
Hygiene Services			£6.30	£1.26	£7.56	£0.30		£0.06	£0.36	
4 4 4 4 4 4	» Cashbooklist A row	10						© 2025 Worker	ave lik Li	mited
© 2025 Workwave UK Limited	CashbookList 410w	5					4	A A A NUM 22/0	01/2025 1	10:48

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Close	Refresh	Print	Excel	Expand	Collapse				Open	View	Filter	Un-filter	Immediate	Apply last filter	Change filter	Select	Publish	1	
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Navigato	r				ą	Alerts C	ashbook Lines												×
Trans	saction	Regi	ister			Cashbo	ook Lines												
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00	Cashbook L	ine List			E	roved by	Approved		Net value	Vat	t value (	Gross value	Cumulativ	e net value	Cumul	ative vat v	alue (	Cumulative gross value	/AT code
	ournais	19.1				·								L	┛				
Favouri	Journals     Favourites     Contract Admin								£1.00		£0.05	£1.05		-£1.00		-£(	0.05	-£1.05	2 - 2 (5%
Contrac	Favourites								£2.00		£0.40	£2.40		-£2.00		-£(	0.40	-£2.40	1 - 20 Pe
Payroll									£1.10		£0.06	£1.16		£1.10		£	0.06	£1.16	2-2 (5%
Workbil	avourites iontract Admin Yayroll Maekhille							£2.20		£0.44	£2.64		£2.20		£	0.44	£2.64	1 - 20 Pe	
Billing																			
Dining		•																	
Transac	ction Regi	ster																	
Stores						-													
Reports	5																		
Period/	Year End																		
Mainter	nance																		
Service	Costilicour une Liss Journals Favourites Favourites Contract Admin Payroll Workbills Billing Fransaction Register Stores Reports Period/Year End Maintenance Service Point Hygiene Services					_													
Hygiene	Services								£6.30		£0.95	£7.25		£0.30		£	0.05	£0.35	
				40 40 40		Cashbook	linelist Arous											© 2025 Workwave UK	l imited
@ 2025 V	Vorkwave l	UK Limite	ed			Cashbook	LINCLISE 4 TOWS									4	ê ê	NUM 22/01/2025	10:49

# 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:

	System	Control - Accounts				×
General						
📁 🔒						
Close Save						
Navigate						
Accounts Accruals	Purchase invoice matching	Default analysis for prospects	Debtor Manager			
Accrue timesheet b	udgets	When date is zero	-	·		
Unused holiday acc	crual task type	Daily office cleaning	<b>B</b>			
Uninvoiced stores of	order cost accrual level	Summarised	•	·		
Workbill cost accru	al %	80.00%				
Workbill accrual typ	pe	Standard	-	·		
Workbill budget acc	crual type	Both Both Labour Supplier Hecrae uninvoiced stores of		•		
SystemControl_Accou	nts		6	2025 Workwa	ave UK Li	imited

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:

<b>a</b>	<b>)</b> =					Debtor Manager						- 0	×
	General												
Clo Navi	se in fragate	itents Transaction ites Overdue nvoices V Promises Includ	s 🗶 Broken pro Disputed On stop le	omises View	Send Put on letter stop	<ul> <li>Statement</li> <li>Statement document</li> <li>Attachments</li> <li>Client</li> </ul>	E Send letter Statement Attachments Site	Send Chang letter promis Transacti		🤁 Refresh 🎲 Print 🍲 Excel	Collapse Default sort	<ul> <li>Change filter</li> <li>Select filter</li> <li>Filter selecte</li> <li>Filter</li> </ul>	r 🛄 ed 🛄
Drag	Drag a column header here to group by that column.												
🚰 Rec	ord type	St Datasource	Client code	∆ Client name	Site code	∆ Site name	Balance	Future	Up to 30 Days	31 - 60 Days	61 - 90 Days	91 - 120 Days	0
										] [			
2	Client	Demo accounts	ABC1201	abc123			£10.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	Site	Demo accounts	ABC1201	abc123	*unknown	*unknown	£10.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	Transaction	Demo accounts	ABC1201	abc123	*unknown	*unknown	£10.00	£0.00	£0.00	£0.00	£0.00	£0.00	
2	Client	Demo accounts	ABP001	New Client Ltd			£5,606.41	£0.00	£0.00	£0.00	£0.00	£0.00	
	Site	Demo accounts	ABP001	New Client Ltd	*unknown	*unknown	-£264.89	£0.00	£0.00	£0.00	£0.00	£0.00	
	Transaction	Demo accounts	ABP001	New Client Ltd	*unknown	*unknown	-£300.89	£0.00	£0.00	£0.00	£0.00	£0.00	
													- × *
Commun	ication notes					<b>дх</b> Ас	tion notes						ąχ
1 🔍 V	iew 🥭 Refr	resh 🐁 Print 👈 Exc	:el			1	🚯 New 🔍 View	🧬 Refresh 🐁	Print 🐁 Exce				
圉	By	On $\bigtriangledown$ At	$\nabla$			F	By O	n ⊽ At	$\nabla$				
						20							
DebtorM	lanager 236 ro	ows									@20	25 Workwave UK L	imited 🖌

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 Batch Details - (new)			×
General				
	Notes			
Close Sav	ve Delete Post			
Navigate	Save Other Batch			
General Extraction				
Batch number	new batch			
Description	End Date Billing Lines			
Accounts system	Demo accounts	*		
Review type	Value Frequency End date			
End date				
Reason for chang	e			
BillingReviewBatchDe	etail	© 2025 Workw	ave UK L	imited

# **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.

	🔿 🛃 🗧		Billing Review Item			8_3		×
General								
		🙆 Delete						
Close Previous	Next Save							
Navigate		Save						
Review Item								
Batch	End Date Billing	Lines						
Contract	The Apple Tree			0	1	Vie	w billing l	ine
Date								
Effective date to	28/01/2025	•						
								_
Reason for chang	le							
BillingReviewItemD	etail				© 202	5 Workw	ave UK Li	mited

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:

	ji 🔶 🗐		I)=	U	ser D	etails - Dav	/e Tell	_		×
$\mathbf{w}$	General									
Close	Previous		t Save							
	Navigate		Save							
General	Portals / M	obile	User Roles	User Groups	QA	Templates	Stores Templates	Data Form Templates	Training	TI I F
User Id			DT					_		
Name			Dave Tell							
Job title	•		Dogs body				6	•		
Telepho	one		22							
Direct d	lial									
Fax										
Mobile										
Email a	ddress		Dave.Willian	n.Tell@templa.	com					
		Ì	BCC this	address when a	send	ing emails?				
Sales p	erson									
User lev	vel		FULL		•					
Workflo	w level		Manager		•					
Alerting	option		Alert		•					
Initial fo	orm		Alerts		•					
Overrdi	ing windows		English				6	•		
languag			Change p	assword on nex	kt log	jin?	Block format ch	anges on filtered lists?		
			Restrict a	ccess to value	s?		Suppress billing	g review history update?	,	
			Suppress	license warnin	g?		View my user g	roup's ad hoc jobs only?	?	
			Allow view	w of archived d	ata?		Restricted acce	ess to user group ad hoc	jobs?	
			Filter note	es by user role?	?		Exclude from a	uto-expiry?		
			Restrict c	ontacts to user	s sit	es only?				
		- 6	Allow pro	file switch?						1
UserDeta	ail							© 2025 Workv	vave UK L	imited ,

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.

	<b>1</b>	ontract Management Sys	: System UK STAGING				- = x			
	Tools	•			y	8			<b>9</b> .	8
	Window	•			י וplete		Filter selected	Un-filter selected	🜱 💄 🗑 🧭	
0	About TemplaCMS				(	Other		Filter		Status
P <sup>4X</sup> .q	Captions					_	_	_	_	×
9	Enable grid pins									
3	Print screen				Owner o	details		:	Subject	
1	Email screen									
1	Reset window									
		😨 Switch	account 🔋 Log off	📲 Exit 📁 Close						
Billing										
Transad	ction Register									
Stores										•
22	999999	ActionLis	st 0 rows	-				© 2025 Wa	vrkwave UK	Limited
© 2025 V	Vorkwave UK Limited		Mary Smith (cleaning)			6		A NUM	06/02/2025	14:13

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.

<b>()</b>	vitch account —	
General		
Close		
Navigate		
Account		
Current		
-	Mary Smith (security)	
Keep windows op	en?	
Switch to:		
- N	Mary Smith (cleaning)	
-	Mary Smith (admin)	
-		
-		
-		
-		
	@ 2025 W.	leven IIV Linete A
SwitchAccount	© 2025 Wor	kwave UK Limited

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.

General					
se Save					
avigate					
omer Portal Password Settings	Links Binder Links				
ser Guide	and the second se				
User guide					
reas					
Clients	Display at logon?				
V Sites	Display at logon?				
Contracts	Display at logon?				
Employees	Display at logon?				
Quality Audits	Display at logon?				
Service Requests	Display at logon?				
T&A Clocking	Display at logon?				
T&T Checks	Display at logon?				
Vorkbills	☑ Display at logon?				
3rd party T&T checks	🔲 Display at logon?				
👿 3rd party Drop management	Display at logon?				
3rd party RAMS	Display at logon?				
Quick View					
ervice Request Creation					
Default SR source	Auto from QA	<b>6</b> <i>w</i>			
Default contact type	Main contact	<b>6</b> 0			
Default job title	Operations Manager	<b>6</b> 0			
Default note class	High	ØØ			
Other					
Login URL	http://localhost:9856				
ile Download					
	Use access token for docume	ent store downloads?			
Access token	sv=2022-11-02&ss=f&srt=o&sp= 21T09:26:33Z&spr=https&sig=rg 3D	rl&se=2025-01-24T17:26:33Z&st=2025 aS3yAaMZ0tiE7Q1htjleZgHhh7clN5pF	-01- sVc3u0%2F18%		

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.

	System Control - Payroll	22		×
General				
Close Save				
Navigate				
Payrun Timesheets Furlough/JSS Emp	oyee schedule Holiday Auto-leave Cost retrieval Reconciliation Gender pay gap	Average earnings	Employeed	hecks
Accrued holiday pay/deduction cost type	Leaver holiday pay			
Unused holiday accrual type	Exclude future bank holidays			
	Hide bank/public holidays on timesheets and payslips?			
	V Holiday accrual (in hours) allowed?			
	Manage holiday by contract task?			
Timesheet joiner accrual holiday method	Ø			
Zero hour contracted employees leaver holiday weeks	0			
Delivered hours holiday calculations				
Include holiday in delivered hours?	Include bank/public holiday in delivered hours?			
Include holiday in delivered pay?	Include bank/public holiday in delivered pay?			
Automatic public holiday pay				
Apply calculation rules?				
If working at least 20 hours, ov	ver the preceding 5 weeks			
Pay using extra type Bank holiday p	ayment 🔊 🚳			
Absence reason Bank holiday	<b>6</b> @			

# **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

	🗭 🛃 🗧 Employee Detail - Mr Alex Smith			8000		×
General General Close Previous Navigate	Image: Next     Image: Notes     Image: Create mail     Image: Create mail	Check working time conflicts	Reports			
Personal details	vork   Auto Enroiment   Banking   Sites   Holidays   Properties   History   Leams   Furlougn/JSS   Time and attendance   Fa	y on demand   Ima	ge			
Name Address Town County	Mr Alex Smith     Telephone       120 High Street     Image: Company phone       Tonbridge     Company phone       Kent     Company email					
Postcode Sex Date of birth Passport	TN9 2RF     Dates       Male     ✓       (not set)     ✓       Expiry     (not set)       TUPE     (not set)	• •				
3ank holiday contro	ol? Pay both   Rate £15.49 Hours 2.25 Emergency contact information					
Payroll Payrun Payroll number Pay frequency	Demo payrollMonthly     Contact name       **8518     Owned       Monthly     NIC number   Max hours per week	0.00				
Employee group						
Employee group	P46 details         Suppress holiday pay adjustment calculations?         Block Employee Portal log-in?         Mobile worker?         No P46 required         No P46 required         No P46 or P46 incomplete					
Approval Approval level Site Employee						
nploveeDetail			62	025 Workwa	ive UKL	imite

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.

Award Scheme Details - Modern Cleaning Award	_		×
General			
📁 🔶 📄 🔒			
Close Previous Next Save Save and			
Navigate Save			
General Award rates Shift identification rules Calculation rules Dates			
Code MODC			
Description Modern Cleaning Award			
Start time buffer (minutes)			
End time buffer (minutes)			
Minimum gap for day adjustment (minutes)			
Maximum gap for continuing session (minutes)			
Maximum gap for continuing breaks (minutes)			
Standard breaks Daily overtime breaks			
Paid for breaks? Use shift-prefer paid			
First break 0.5 (hours) after first 5 (hours)			
Subsequent breaks 0.25 (hours) every 2 (hours)			
Break buffer (minutes)			
<ul> <li>Apply shift identification to leave adjustments?</li> <li>Suppress hours roll-up when rate below basic?</li> </ul>			
Include missed rostered hours in overtime calculations? Configure missed hours			
AwardSchemeDetail	© 2025 Workwa	ave UK Li	mited /

#### **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.

Award Scheme Details - Modern Cleaning Award	_		×
General			
📁 🔶 📄 🔡			
Close Previous Next Save Save and			
Navigate Save			
General Award rates Shift identification rules Calculation rules Dates			
Code MODC			
Description Modern Cleaning Award			
Start time buffer (minutes)			
End time buffer (minutes)			
Minimum gap for day adjustment (minutes)			
Maximum gap for continuing session (minutes)			
Maximum gap for continuing breaks (minutes)			
Standard breaks Daily overtime breaks			
Pattern for paid breaks in overtime beyond the maximum hours per day			
First break 0.5 (hours) after first 3 (hours)			
Subsequent breaks 0.25 (hours) every 1 (hours)			
Apply shift identification to leave adjustments?			
Suppress hours roll-up when rate below basic?			
Include missed rostered hours in overtime calculations? Configure missed hours			
AwardSchemeDetail	© 2025 Workw	ave UK Li	mited

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.

•	Datasource Details - Cleaners	Payroll	- 🗆 X
General			
📁 🔶 🌳 💭 🛃 🛛			
Close Previous Next Save Save and Co	ontrol letails		
Navigate Save O	ther		
General Payroll Pay frequencies Pay on demand T	ime & attendance Email preference	es Payslip details Dates	
Linked datasource (none)		✓ Wage budget	override tolerances
		Hours	nder Over
Timesheet entry style ANZ shifts		▼ VI	0.00 %
Auto-tick all shifts?		Value	0.00 % 0.00 %
Timesheet print seq. Employee/Task		•	
Allow basic hours entry Timesheets With Contracted	d and Non-Contracted Employees		
Generate RTI data review During pay batch generation	1	▼	
On cost journal level Summarised		<b>▼</b>	
Post BTI batch during par	v batch post?		
Timesheet completion Timesheet completion.	, baton poor.	<b>6</b> 0	
Send to payroll			
Un-paid absence? Pay type			
Paid breaks? Pay type P	aid breaks	Ø	
Override monthly pay based on the second	atch end date?		
Rates supported on payrun interface?			_
Advance worknow on freeze?     Exception     Exception     Exception     Advance worknow on freeze?	on stages only? w batch 'Tick all'?	Allow variable patterns	£
Allow timesheet weekly freeze?     Lockdow	vn by manager?		
Suppress payroll costs import?	bloyee award rate on temp joiners?	Rostered operator requ	ired for temp joiners?
Vacancy processing			
Enable vacancy processing?			
DatasourceDetail			© 2025 Workwave UK Limited

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		



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