TEAM Software
by WORKWAVE

Advance Data Forms
TEMPLACMS

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COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

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INTRODUCTION

Background

These training session notes are designed with the intention of providing background information and useful hands on experience of using general CMS functions and the CMS customer service module.

These notes are designed to complement the training and assist you at a later stage when away from the training environment.

Overview

Advance Data Forms provides more comprehensive functionality that the standard original Data Forms functionality, the latter of which is detailed within the Customer Service manual.

Familiarity with the existing TemplaCMS mobile application and the current completion process (e.g. for QA forms) may help users design advance data forms for mobile devices.
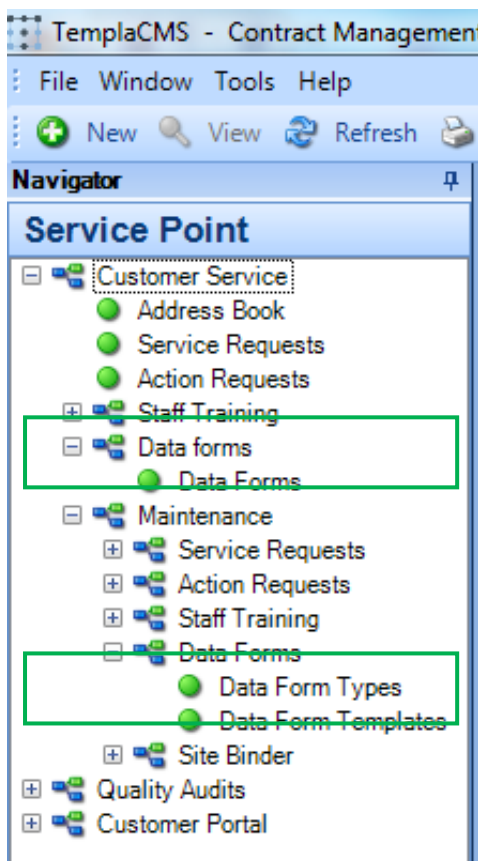
SYSTEM

License

The Advance Data Forms (**AF**) module is separately licensed so a relevant license key must be obtained from Templa and applied to Templa-CMS.

Menu structure / Navigator

The relevant menu options exists under the Service Point > Customer Service menu.

System Control

There are no specific settings on System Control for (Advanced) Data Forms.

Functions & Function Groups

As 'Advanced Data Forms' are an extension of 'Data Forms', the existing data form function groups are relevant:

- ***DATAFORM**   Data Form Functions
- ***DATAFORMV**   Data Form Functions – View

It is up to the Templa-CMS system administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant QA options.

Users / Device Registration – Template assignment

Data form templates need to be assigned to users for them to be used – this can be done via User Maintenance or Device Registration or Data form templates (see below).
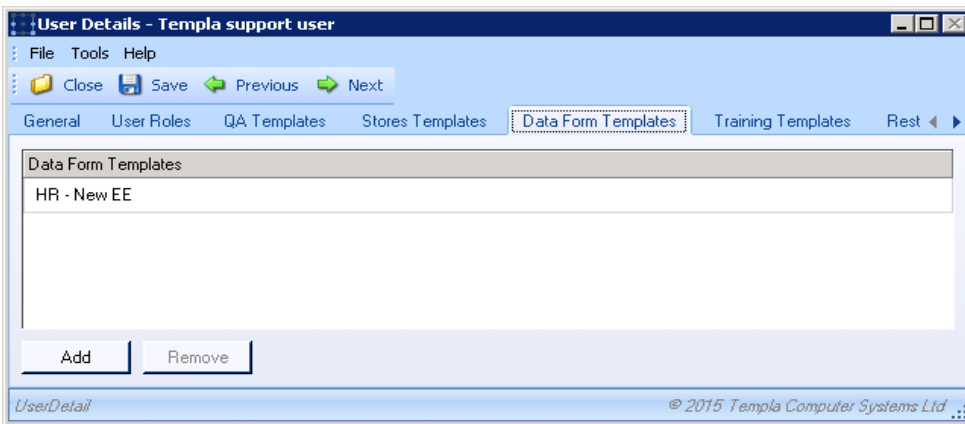

Please note:

- the user's device registration would also need to be updated so that they have visibility of 'Data Forms' and then a 'Send Settings' and perhaps 'Synchronize Now' undertaken in order to load the data form templates to the device.
- if employees are being created off the back of an Advance Form, then a TemplaCMS user must be setup to have authority to add these employees into SelectPay when the 'Send to Payroll' option is selected

Workflow Statuses

A following workflow statuses should be pre-defined for data form control:
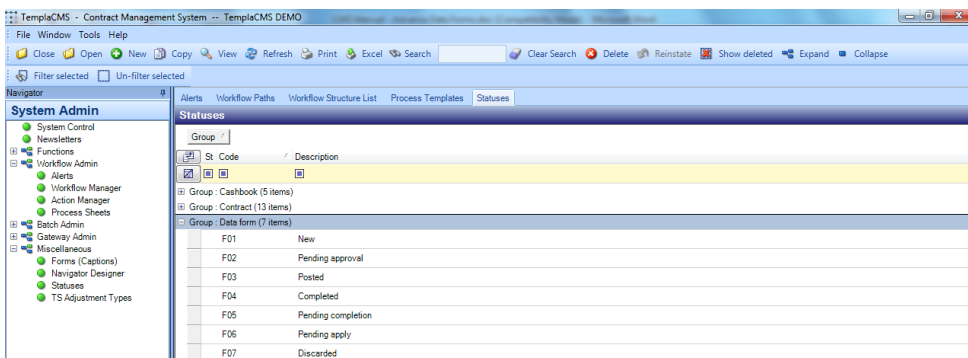
Workflow Paths

It is possible to define workflow paths for (advanced) data forms to control the signoff of information entered on a data form, be that within TemplaCMS or on a mobile device. These workflow paths are defined in the normal way so can have one or more stages. The use of these workflow paths will be covered briefly under data form types below. Set up of workflow paths is covered in greater detail in appendix D.

POST – COMPLETION WORKFLOW PATHS

A post completion workflow path can be defined by either business analysis specific routing, or by the following three rules:

- Vetting site?
- DBS site?
- Other site?

> **NB: If each of the above rules require the data form to be routed to different users then three different stages are required.**

For example:

New starter workflow
Stage 1 : Vetting?
Region A : route to vetting dept, region A user
Region B : route to vetting dept, region B user
Stage 2: DBS?
Region A : route to DBS dept, region A user
Region B : route to DBS dept, region B user
Stage 3: Other
Route to Payroll

Thus an employee on a site that is both vetting and DBS would be routed firstly to the vetting department based on the site BA, then on completion of vetting would be routed to the DBS department, again based on BA. Whilst a site that is neither vetting nor DBS will progress directly to payroll. Note that if there is a requirement for all employees to be routed to payroll then this can be achieved by applying the existing rule 'authority required' rather than 'other site' on the third stage.

Datasource configuration

In order for the function that allows you to send an employees details to payroll, an interfacing user needs to be configured in the SelectPay database. Once a user has been configured in the User ID will need to be entered in the box below:
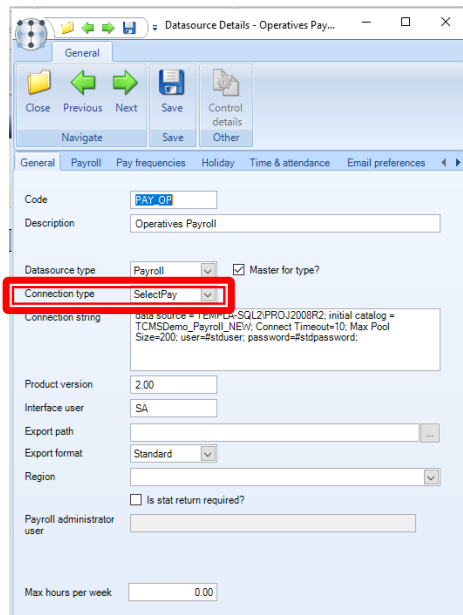

MAINTENANCE

Data forms can be used for anything that requires data capture, not specifically covered elsewhere in TemplaCMS, e.g. employee start-up details, site details, cleaning specification, risk assessment, method statement, holiday request, etc. The original standard data forms were purely for data capture and did not facilitate the data entered on the form to be linked and converted into actual data within TemplaCMS, e.g. employee records, site details, etc; whereas the advance data form module does allow this, plus provides a more flexible designer.   The following notes are therefore geared towards advanced data forms design and implementation; conversely details on the setup and use of the original data forms are outlined in the Customer Service manual.

Data Form Types

Each **data form template** must belong to a **data form type**, where the **data form type** allows for the classification of **data form templates**, plus controls workflow approval requirements and user permissions.
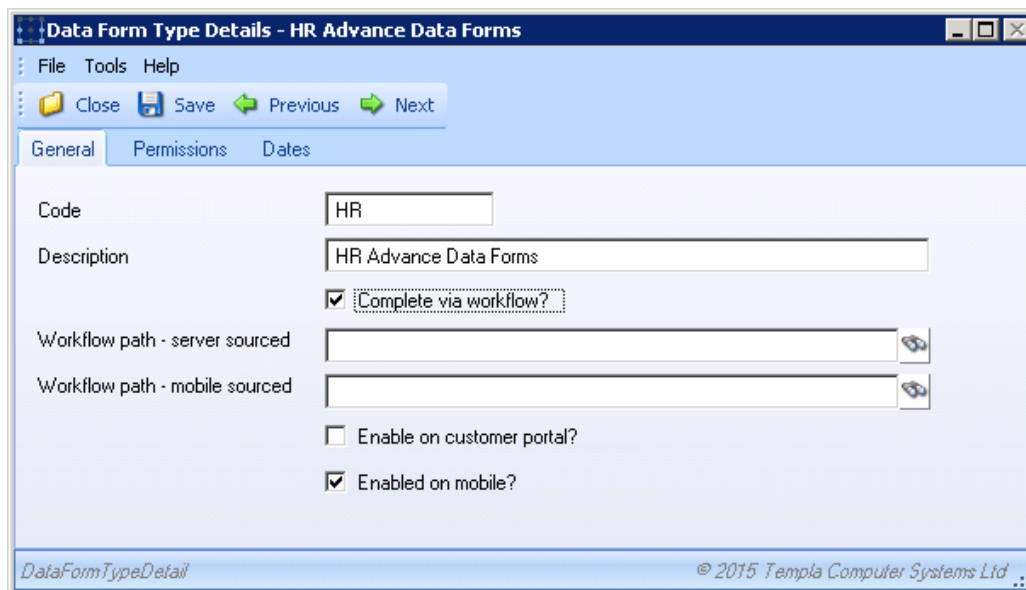
Completed via workflow – checking this checkbox activates the *workflow path* field.

Workflow path(s) – valid **workflow path(s)** with an internal type of 'data form' must be selected, if the 'completed via workflow' is checked. The server-sourced workflow path is to control the delivery of advanced data forms (created within TemplaCMS) to a specific user or users, whereas the mobile sourced workflow path is to control the routing of advance data forms (completed on the mobile) to the relevant user or users.

Enable on customer portal – this must be checked for the data form templates associated with this data form type to appear on the customer portal.

Enable on mobile – this must be checked for the data form templates associated with this data form type to appear on the mobile device(s).
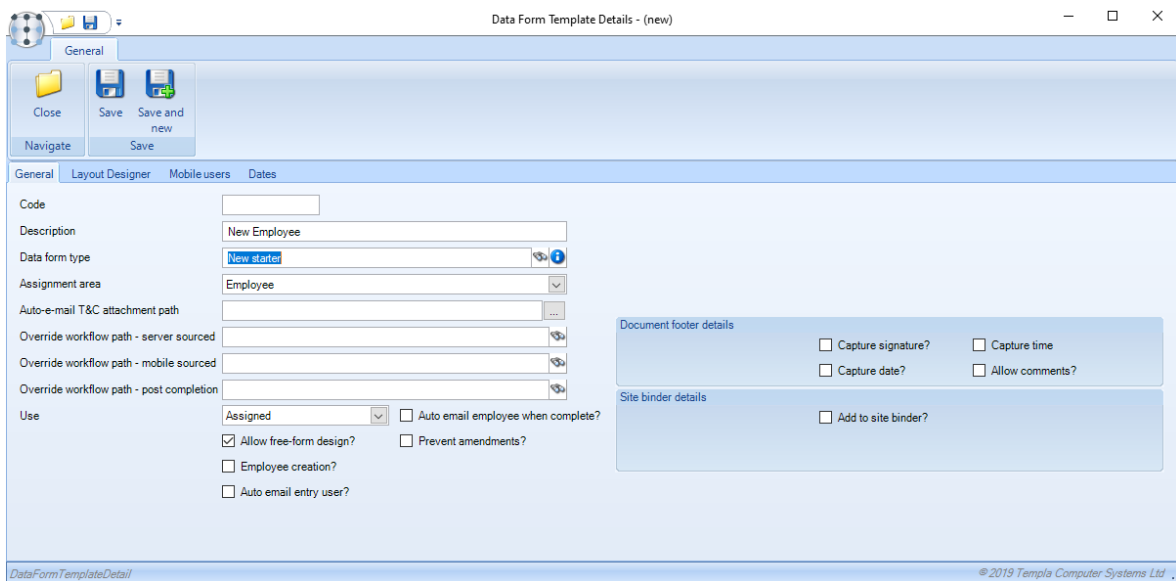
Permissions – these must be defined so the associated **data form templates** can be restricted to specific user roles or assigned to all user roles, as with attachment types
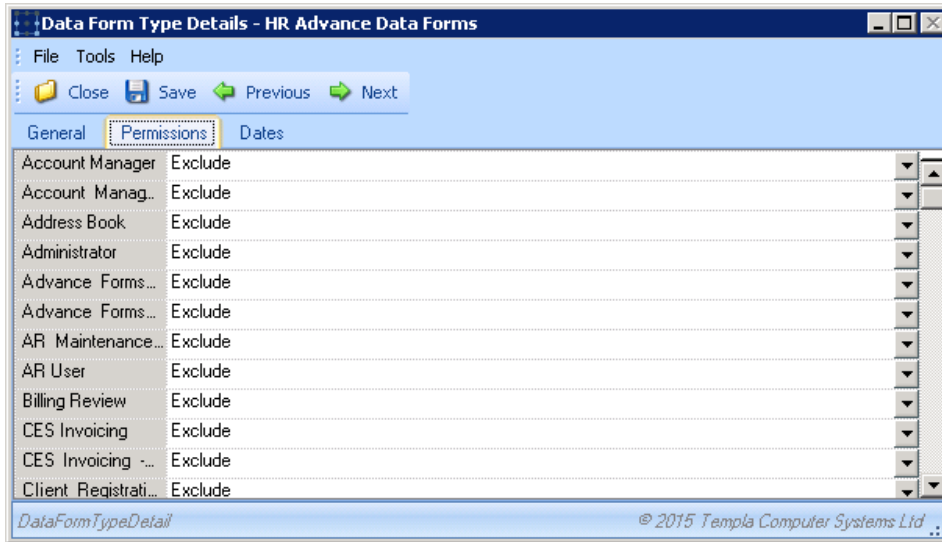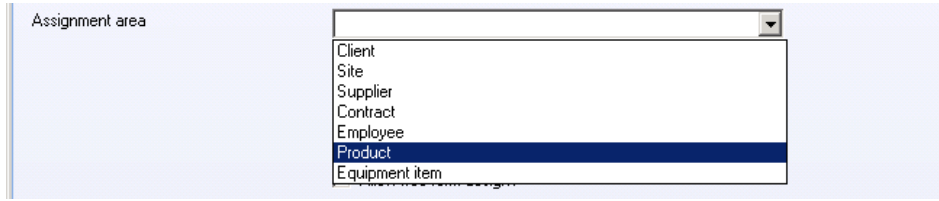

Data Form Templates

Any number of data form templates can be defined, where each one has a combination of header information and internal content:

HEADER INFORMATION

Data form type – this must be selected as detailed above.

Assignment area – data forms can be created for anyone of the following areas

Auto-email T&C attachment path (document) – when defined and when *Auto-email employee when complete?* is also set, then the e-mail sent to an employee automatically on completion of the data form will include the relevant document, e.g. contract of employment's terms & conditions

Override Workflow path(s) – valid **workflow path(s)** with an internal type of 'data form' can optionally be selected; for their use, see data form types above.

Use? – options are 'Assigned', 'Unassigned' or 'Both' so when completing forms, if set as 'Unassigned' the completer will not be asked to select an existing record (e.g. employee) whilst if 'Assigned' then the completer will be asked to select an existing record; so a new starter form would be set as 'Unassigned' but a holiday form would be set as 'Assigned' (or 'Both').

Employee creation? - if checked, this creates a temporary employee on Templa Mobile for use on subsequent forms, i.e. prior to the real employee being created in SelectPay; thus a new starter form could be followed by a holiday request form for the same new employee

Auto-email employee when complete? - if checked, the employee will be auto-emailed when the form is complete (i.e. after any workflow approval), if an email address has been provided; thus, for example, an employee can be emailed back a copy of his 'New Starter' or 'Holiday Request' details.

Auto-email entry user? - if checked, the (mobile device associated TemplaCMS) user (e.g. manager) that entered the form will be emailed a copy of the completed form,

Allow free-form design? – this must be checked to facilitate the advance data form design tab called 'Layout Designer'; if not ticked the original data form 'Content' tab will be available instead, the use of which is described in the Customer Service manual.

Document footer details – checking any of these details will result in a final 'Completion' tab being made available on the mobile device for completion, e.g. for an employee start-up form the completion tab might be something the area manager signs:

- *Capture signature/date/time?* – these force the corresponding information to be entered
- *Allow comments?* – this allows closed notes

Add to site binder – the use of this checkbox and site binders per se is described in the Customer Service manual.

LAYOUT DESIGNER
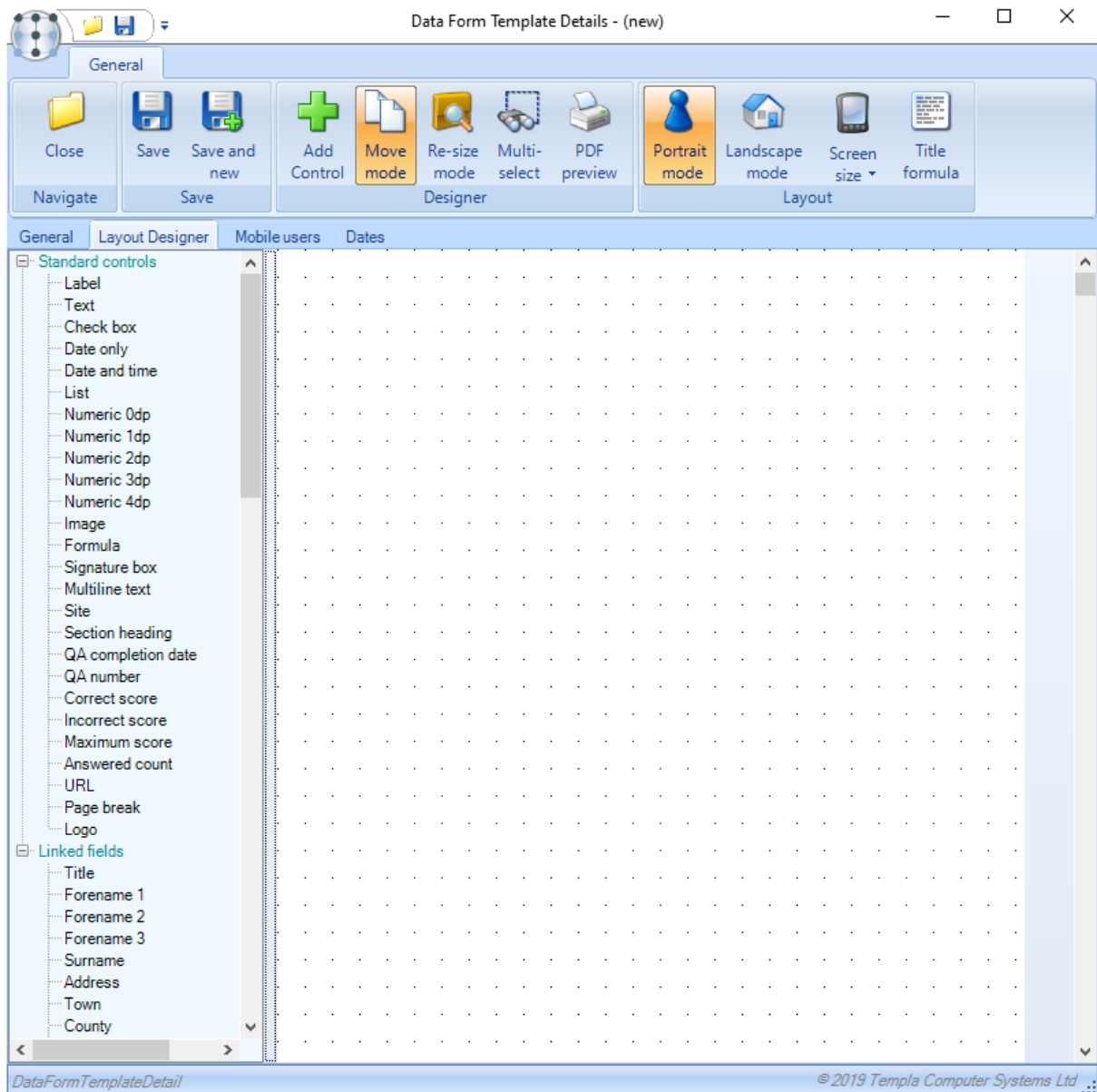
Add control – this allows a data field to be added to the form (see below); if used from the top of the screen, the control will be added 'top left' so click on a specific point on the form layout or *right-click* (as below) to get the field to position at a certain point.

Move mode – this allows a data field to be moved within the layout by highlighting it and then moving it to the new location.

Re-size mode – this allows a data field to be re-sized, i.e. the surname field to be extended or the photo box to be enlarged.

Multi-select – this allows multiple data fields to be moved together; each data field should be clicked on in turn (which will result in the field boundaries turning green) before dragging and dropping the group to a new location on the form.

Portrait or Landscape mode – the ability to toggle the designer between a portrait and landscape layout can be done using the buttons top-right. However, this will not prevent data form templates being designed that potentially do not fit on a mobile device screen, so requiring the user to scroll left/right or up/down.

Screen size – this reduces the size of the design page to either 5" (for a phone) or 7" (for a small palmtop / tablet) from the 10" standard design page aimed at a large tablet

Title formulae – this allows the default Advance Form title to be auto-created in a pre-determined manner from other fields on the form

Right-clicking *on any control* – this will allow the options: Edit Control, Copy Control, or Delete Control

Right-clicking on the design surface will allow the following options:
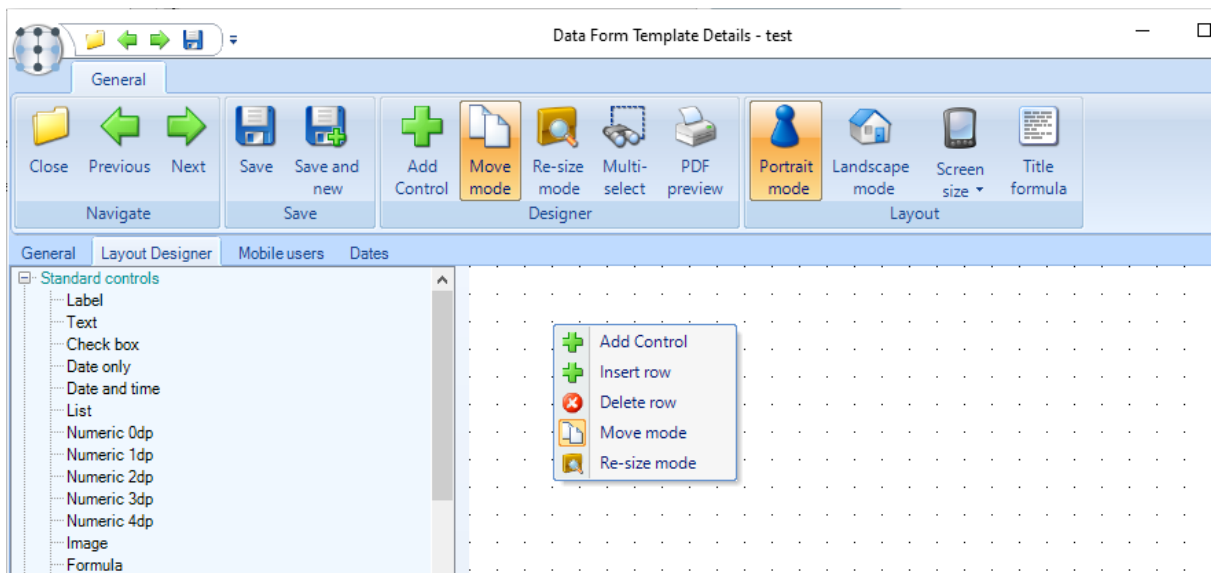
Add Control

This is the key area that allows each field on the form to be designed:

Line text – if the data type is 'None' (i.e. it is a label) then the value entered here will appear on the resulting form; if not, then the value entered here will act as a watermark.

Fill/Text Colour – controls the colour of the background (fill colour) or the text

Font – controls the font format style, i.e. size, bold, italic, underline; the '*Read only?*' checkbox also controls whether the field is informational or enterable – **this is key,** as only fields of data type 'None' are normally read only

Data type – data type must be defined where the options are (as partly shown), i.e.: none, text, check box, date only, date & time, list (see below), numeric value (of various sizes), image, formula**, linked field,** signature, multi-line text.   Some of these data types prompt further options, as follows:

A **list** will activate a tab for valid entries:

NB: UDP lists will automatically bring over their valid entries
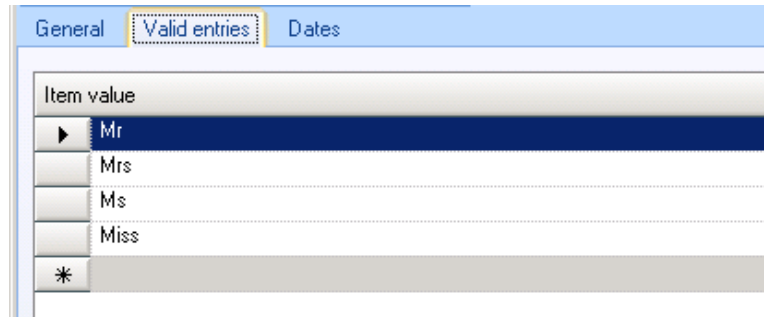
A **formula** prompts a tab for formula details, with the data type of each potential data source field shown to the right – this requires careful use but any number of numeric fields could be linked together, e.g. for a site quotation sheet:
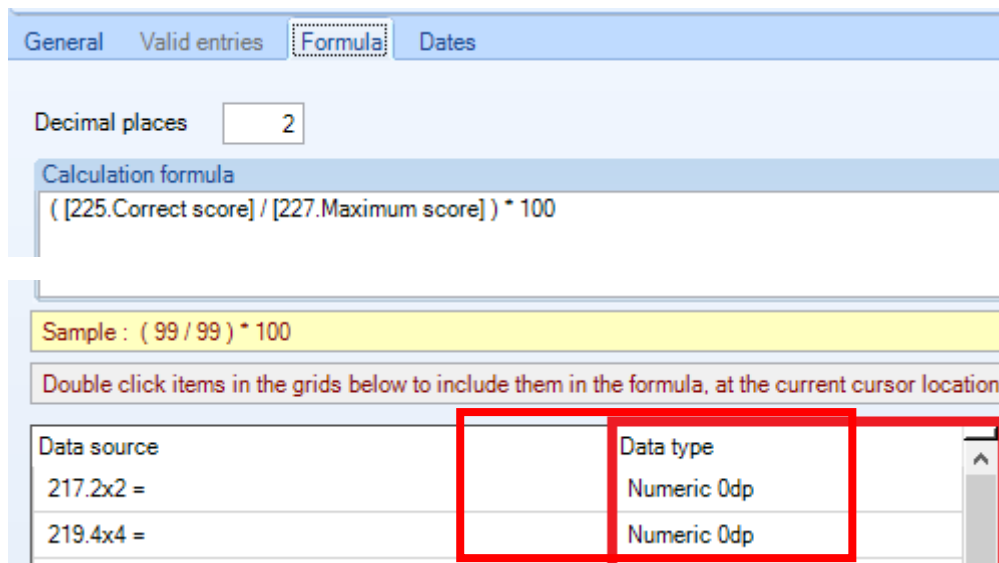
A **linked field** will prompt for a TemplaCMS data field – see **Appendix A** for a full list
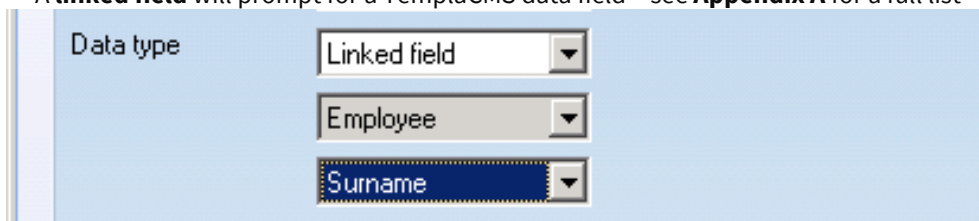
An **image** prompts for either a file path (i.e. if an image is to be displayed, such as the company logo) or an attachment type (i.e. if an image is to be captured)
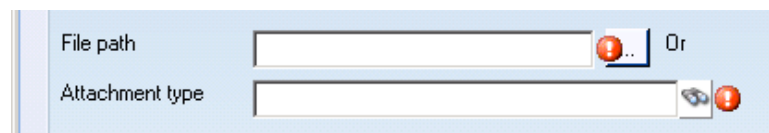
A **logo** will use the file named 'DataFormLogo.png' located in the 'Images' folder of TemplaCMS folder and no further action is required; this saves defining a specific 'Image' control with a file path the relevant company logo.

A **signature** prompts just for an attachment type:

Mandatory? – forces this data field to be completed; if set for an image (e.g. employee photograph) with an attachment type, then 'Templa Mobile' will force an image to be taken.

Default value? – a default value can be optionally specified; depending on the data type, the default value field will change, e.g. for a checkbox it will be a checkbox, for a list it will allow a 'Valid Entry' to be selected, for a multi-line text it could be whole paragraph, etc.

Section Headings/Conditional Sections

Where the control type of "Section heading" is selected, an additional tab for "Condition" is displayed which controls whether the user will complete the "Section" or not, e.g. if the condition is "DBS required? = Yes" then this will demand that the user completes a number of further fields in the following section.
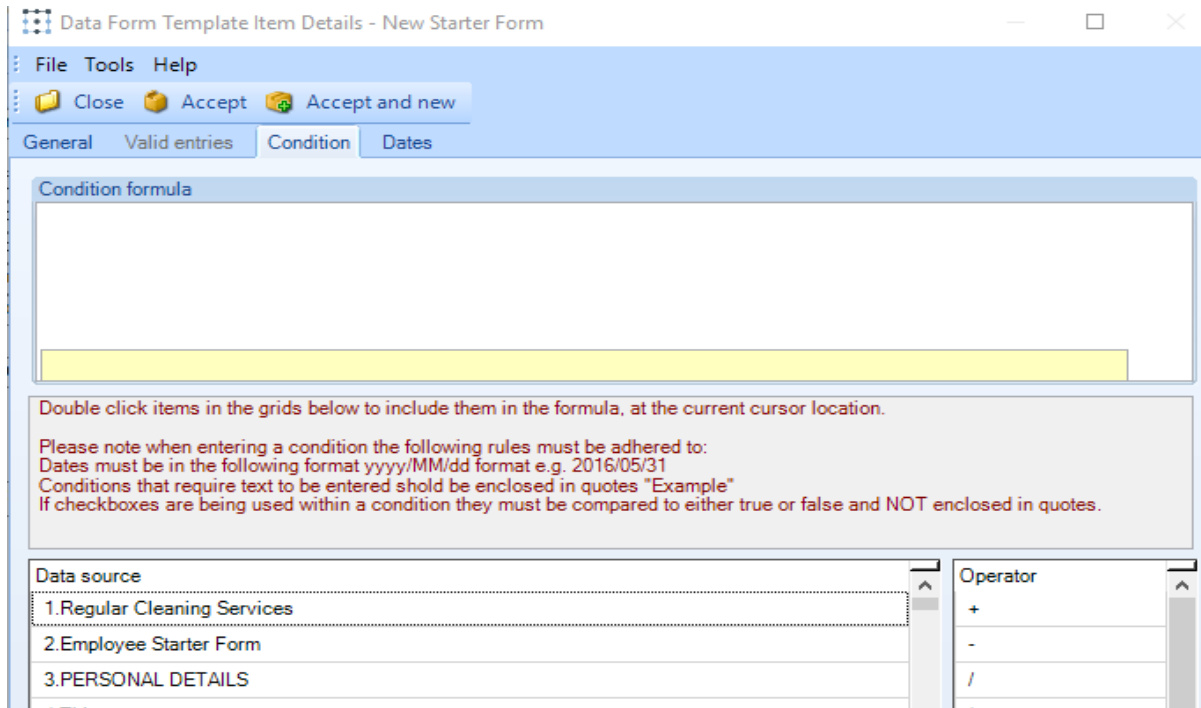
Where a section is to be conditional a formula must be entered on the above tab, a decision as to whether the section is available for completion is then made based on this criteria. The type of formula's accepted can be any of the following:

- A sum e.g. field A + field B – field C = 10
- An If statement e.g If field A = 10 or 11, If field A and B = 10 etc.
- True or False e.g Field A = True (Can only be used where the datasource is a checkbox)

Once a "Section Heading" has been added, everything below that point within the form is deemed to one or more sections. As such, after a generic set of questions, there could be more specific sections for DBS, Right to Work, etc

URL

TemplaCMS and Templa Mobile have been extended to now include a URL control to advanced data forms. This not only provides for the ability to reference videos, but also allows a link into any other information (e.g. company privacy policy webpage).

When the TemplaCMS user adds the new URL control, it will be highlighted in red, this is to force the user to enter a valid URL

When a data form is created using a template that contains a URL control, the control will be rendered as a label, the label can be clicked and the URL that was entered will be shown within the default web browser on the TemplaCMS users PC. When a data form is sent to (or created on) a mobile device, the URL control will be rendered as a label, when the Templa Mobile user taps the URL control the devices default browser will navigate to the URL that has been defined for the control, when the default web browser is displayed the user may press the back button on their device to take them back to the data form within the Templa Mobile application.

Correct Answers

The ability to define a 'correct answer' for items on an advanced form, along with scoring based on this in order to create forms such as a 'language test' that result in a pass or fail.

The 'Prevent amendments?' checkbox is available on the data form template general tab; this is only shown if the 'Allow free-form design?' check box has been checked. When the new 'Prevent amendments?' checkbox is ticked, once all items have been 'answered', they will be locked down to prevent further changes.

Each numeric, text, or list data item added to the form layout now allows the user to optionally specify a 'correct answer':
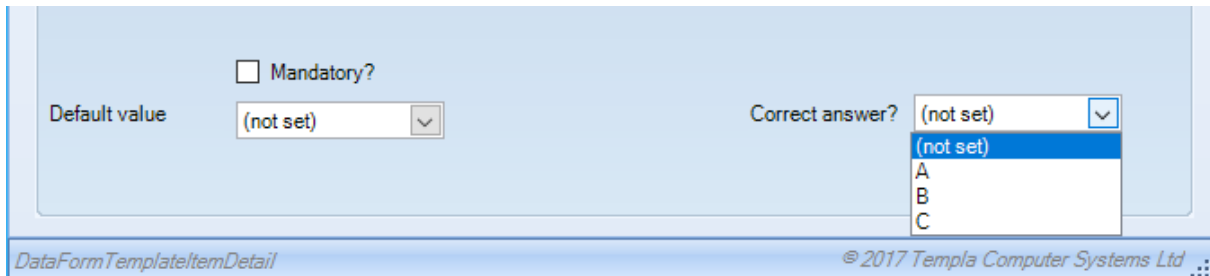
Further controls exist in the 'Standard controls' list within the layout designer:

- *Correct Score* – this will be a count of all the scores that have been answered correctly (The value will not appear until all items have been answered)
- *Incorrect Score* – this will be a count of all the scores that have been answered incorrectly (The value will not appear until all items have been answered)
- *Maximum Score* – this will be a count of how many of the controls have been flagged to have a 'Correct Answer'
- *Answered Count* – this will be a count of how many of the controls with 'Correct Answer' have been answered

These new controls are all numeric thus allowing the option of including these within any formulae required to calculate percentage pass marks.

When completing a data form, any control with a 'Correct Answer' will be given the score of 1 if the answer entered matches the 'Correct Answer' or 0 if the answer entered does not match the 'Correct Answer'. Once all answers have been supplied, the totals will be calculated and the answers may be locked from amendement (based on the 'Prevent amendment' setting). By using these totals in conditional sections, the designer of the form could therefore show the user a success or failure message.

Contract Assignment

A new control of 'Employee contract assignment' has been added to the data form template form, when the new control has been added via the 'Layout designer' the control will be highlighted in red, this is to force the TemplaCMS user to enter the 'Shift pattern days':
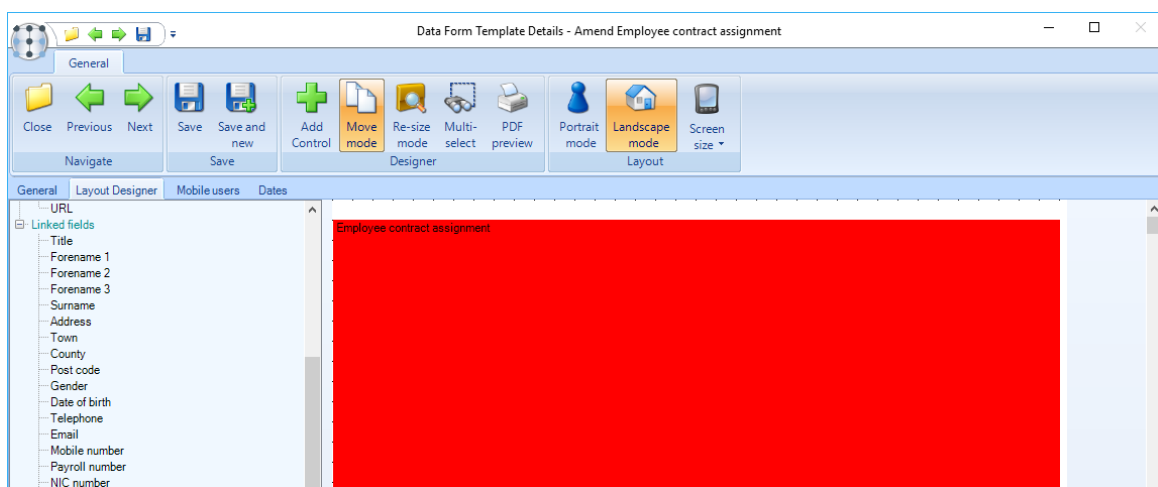
The control must be edited to define the 'Shift Pattern':

Once the 'Shift pattern days' has been defined the control will automatically re-size. It is recommended that the 'Employee contract assignment control' is setup before other controls are positioned on the design surface.

Planned Event

TemplaCMS has been extended to allow for employee staff plan events to be captured on Advanced Forms, e.g. absence, holiday, cover, etc.

When the 'Planned Event' control is added to the 'Layout designer' it will auto size the control and no amendments to the size of the control will be allowed.
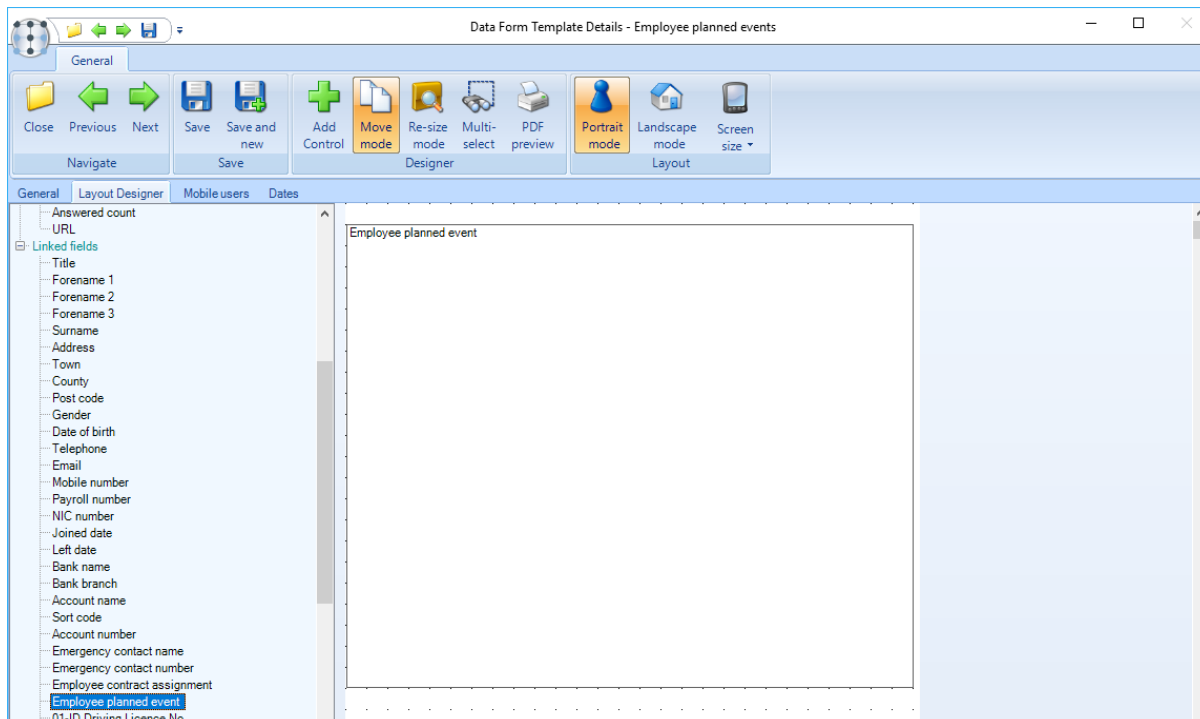
Please note: it will be possible to add multiple instances of the "Employee Planned Event" to a single template. However, if adding multiple controls then this would eventually affect performance on the Templa Mobile app; furthermore, when applying these changes to the Employee Planner each event will be validated and applied in turn.

A new control of 'Employee contract assignment' has been added to the data form template form, when the new control has been added via the 'Layout designer' the control will be highlighted in red, this is to force the TemplaCMS user to enter the 'Shift pattern days':

Page control

The data form template 'Layout designer' shows a page break guide to indicate where the page breaks would naturally occur:

In addition, a manual 'Page break' control can also be added to a form to force a page break at a particular location:
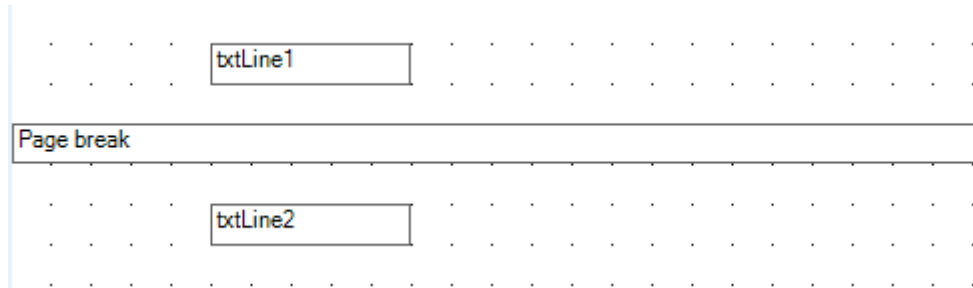
When adding a 'Page break' control, any following page break guides will be adjusted as necessary, i.e. whilst a manual page break will always be respected, the automatic page break guides are purely there to help in the design process. It should also be remembered that multi-line text boxes will expand based on the amount of data a user enters so that these *could* cause actual page overflow to occur differently to the template page guides and, as such, where multi-line text boxes are used, consideration should be given to their likely expansion size when designing the template.

USERS
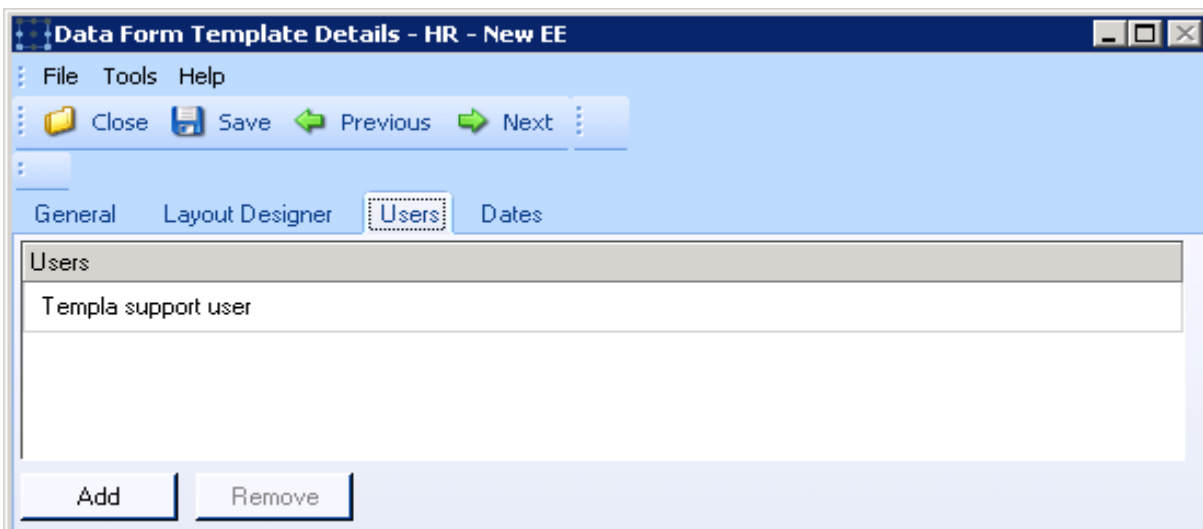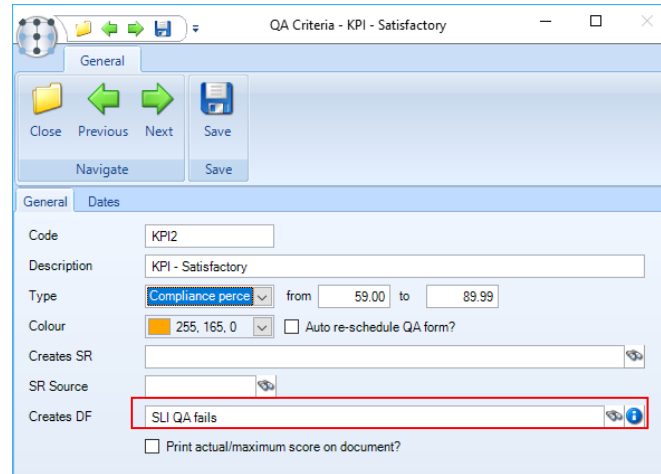
Only users assigned to the template will be able to utilise this data form on the system or on their mobile devices – this user assignment is also available at user and device registration level.

Data Forms Auto-Creation from Quality Audits

NB: this section is only relevant if licensed for Quality Audit
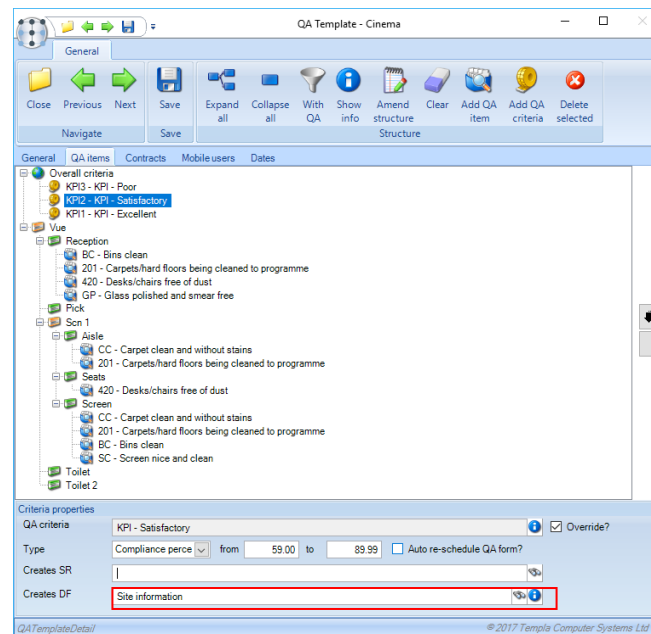
QA MAINTENANCE

The QA criteria now includes a new option of 'Creates DF' (DF = Data form); this new option is optional and can be used with any KPI type. The option allows the TemplaCMS user to select a site-based data form template:

It is also possible to override the 'Creates DF' option on the QA criteria at QA template level:

Two controls have been added for use on advanced data form templates:

- 'QA completion date'
- 'QA number'

Where these controls exist on an advanced data form which has been generated by the QA completion process either within TemplaCMS or the Templa Mobile application the corresponding data will be automatically generated on the advanced form and it will then not be possible for TemplaCMS users to manually overwrite the data.

QA COMPLETION

At the point the QA form is completed and assessed against the criteria, the criteria will be checked to see if a data form template has been entered in to the new 'Creates DF' option, if it has, a new data form will be created using the template defined, the new data form will have the 'Assignment' set to the site that the QA was for.

As with the TemplaCMS QA completion process, the mobile application will also generate a data form if one has been defined on the met QA criteria, if the data form has been auto generated on the mobile device at the point the QA is sent back to TemplaCMS and the completion process is run, the system will detect that a data form already exists for the QA on the mobile device and a duplicate will not be created. When the data form is sent back from the mobile device, the QA will be retrieved and the QA number will be populated within the new 'QA number' control if one is present.

When the data form is generated the mobile user will be alerted to the fact a new data form has been created.
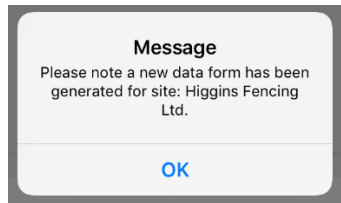
DATA FORMS

The processing of data forms mirrors staff training forms in many aspects.

Data Forms – List & Filter

This filterable list allows the following **data form** specific filters to be used:

Owned by – if selected then an appropriate entry (i.e. client, site, supplier, contract, employee, product or equipment item) can be added in the following search/entry field.

Data Forms – Imported from Templa Mobile

When a new data form arrives from the mobile application a temporary employee code will be created which is shown on the Data Form List along with the employee's name:

The new temporary employee is also visible on the data form header but this information will not be visible once the original employee creation data form has been applied and the employee has a 'real' employee code:

A 'Linked forms' button is also available on the 'Data Form list' and the 'Data form' itself and when pressed will show all the data (and training) forms that are linked to this employee:

When the original data form that was used to create the employee is completed and applied (see below) then all other linked data (and training) forms will be automatically updated to reference the 'real' employee and if any subsequent linked forms arrive from the mobile device the 'Real' employee code will be automatically assigned.

Data Forms – New

This option would be used for server-side one-off creation of data forms.

Area (i.e. Owned by) – the specific area to which the data form relates must be specified, i.e. client, site, supplier, contract, employee, product or equipment item.   An appropriate entry – i.e. client, site, supplier, contract, employee, product or equipment item – can then be added in the following search/entry field, if this data form is for a particular client, site, supplier, employee, etc.

Data form template – this must be entered.

Data Forms – Post

Once the details have been entered, the **data form** must be posted to activate it; multiple **data forms** can be selected at once from the **data form list** for posting:
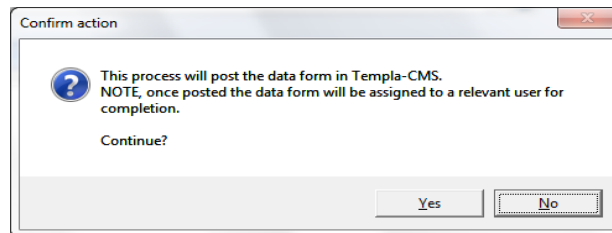
Once posted, the relevant server-sourced **workflow path**, as defined on the **data form type**, will be used to assign the **data form** to the appropriate user; if no workflow path is defined then the data form will not be assigned and can only be completed on the TemplaCMS, i.e. not on the mobile device. If the resulting posted **data form** needs to be re-assigned, then this can be resolved in the normal manner via the Workflow Manager option.

Furthermore, posting the **data form** will generate the necessary structure.

Data Forms – Completion and Signoff

Once the **data form** has been assigned to a user, then it can be completed, either on the main Templa-CMS system (see the Customer Service manual) or on the mobile device; where the data form being completed includes conditional sections, the form will dynamically include or exclude sections based on the data entered to the relevant conditioning controls. If completed on a device as opposed to the main system, the user will need to synchronise the mobile device in order to send the data back where it will appear on the Data Forms list (see above).

APPLY OR DISCARD?

On the Data Forms list, if there are no linked fields (or if this is an original data form), the **data form** status will be advanced to '**Completed**' by workflow. Alternatively, if there are linked fields then the data form will go to '**Pending Apply**' and on opening the data form from the Data Form list, the user will have the option to '**Discard**' or '**Apply**':
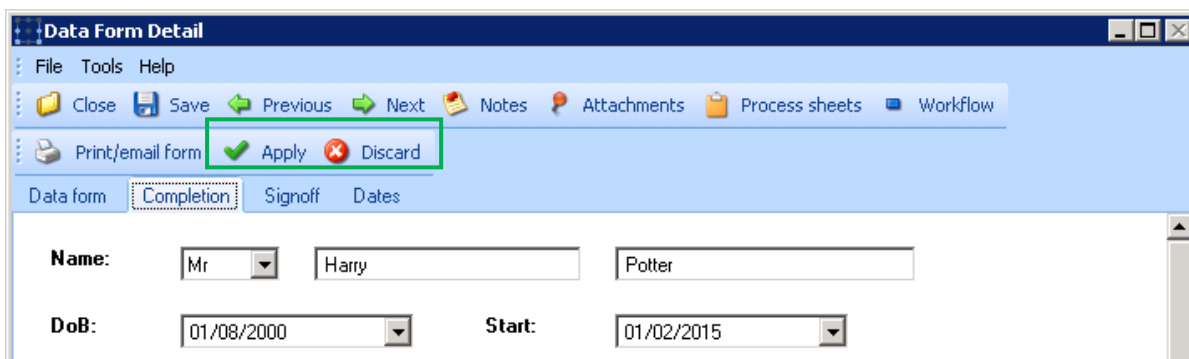
- If '**Discard**' is selected and the form is flagged for 'Allow un-assigned use?' then this will result in the form being deleted; if 'Allow un-assigned use?' is not checked then the user will have the choice of whether to delete or retain the data.

- If '**Apply**' the owner record will be shown (i.e. client, site, supplier, contract, employee, product or equipment item) with all writable linked fields populated from the data form – it is then the user's responsibility to complete any remaining fields. Once saved, the data form will be marked as 'Completed' and be automatically assigned to the newly created record, i.e. client, site, supplier, contract, employee, product or equipment item.

Once the form has been completed, and the form contains the 'Employee contract assignment' or 'Employee planned event' control, new tool bar options will be available:

a) **Apply employee -** this will only be available when a new employee is added, or other employee linked fields have been added to the form

b) **Apply contract** - this will only be available once the employee exists, i.e. they previously existed, or have just been created by via the above mentioned **Apply employee** button.

c) **Apply planned event** - this will only be available once the employee exists, i.e. they previously existed, or have just been created by via the above mentioned **Apply employee** button.

Discrete functions exist to control the apply or discard/abandon process, i.e. separate functions exist for 'Apply employee', 'Apply contract' and 'Apply planned events' in addition to the generic 'Apply'; conversely, the 'Request Approval' function will only allow users to 'Send On' but not to apply, discard or abandon a form.

> **NB: if employees are being created off the back of an AF, then a TemplaCMS user must be setup to have authority to add these into SelectPay when 'Send to Payroll' is pressed.**

ADD OR UPDATE?

Forms can create or update records held in TemplaCMS. However, for non-TemplaCMS employee data held in SelectPay, only certain fields can be updated as follows:

- Code
- Title
- Surname
- Forename 1
- Forename 2
- Forename 3
- Sex
- Birth date
- Telephone
- Fax/Mobile
- Email
- Address
- Town
- County

- Postcode
- Emergency contact name
- Emergency contact number
- Pay frequency
- NIC number
- Passport number
- Bank name
- Bank branch
- Bank account name
- Back account number
- Bank sort code
- Bank reference
- Joined date
- Left date

Data Forms – Un-complete

Once completed it is possible to un-complete any data form via the **Un-Complete** button on the training form header which will prompt the following message:
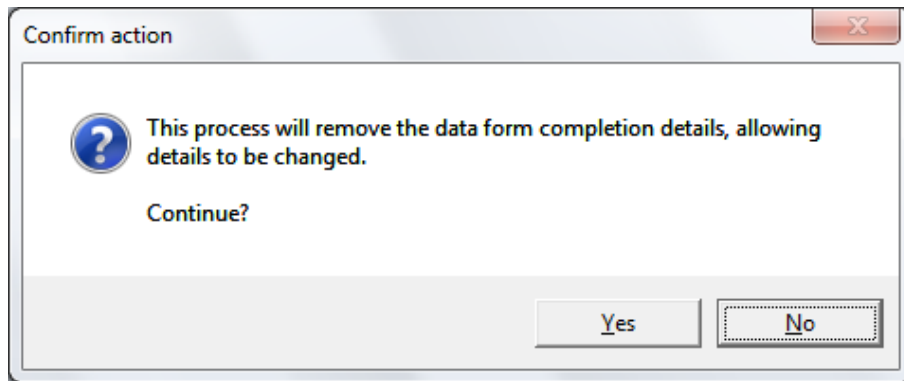

Data Forms – Print & Email

A PDF version of the **data form** can be generated for print or email at any point on a posted **data form**. Thus, the **data form** can be completed on paper and then entered to TemplaCMS at a later stage. When printed it takes into account the settings on the **data forms template**.

Data Form details (elsewhere)

When looking at a contract, site or employee it is possible to drilldown into their data forms and any pictures or signatures will be saved as attachments.
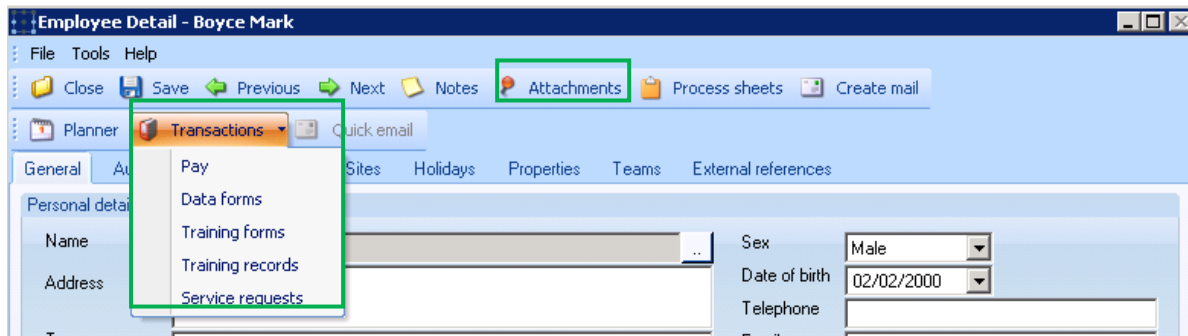
WORKFLOW SETUP

From *Maintenance -> Workflow -> Workflow paths* choose the required workflow path from the list (if it exists).

If a new workflow path is needed, click on *New* and choose the correct path type then enter a unique code and description.

Adding a stage

If the required stage already exists double click to open it, if not click on **Add** and enter a description and the **Status whilst on this stage** for example will the item be awaiting completion or waiting for approval etc. All other fields can be left blank.
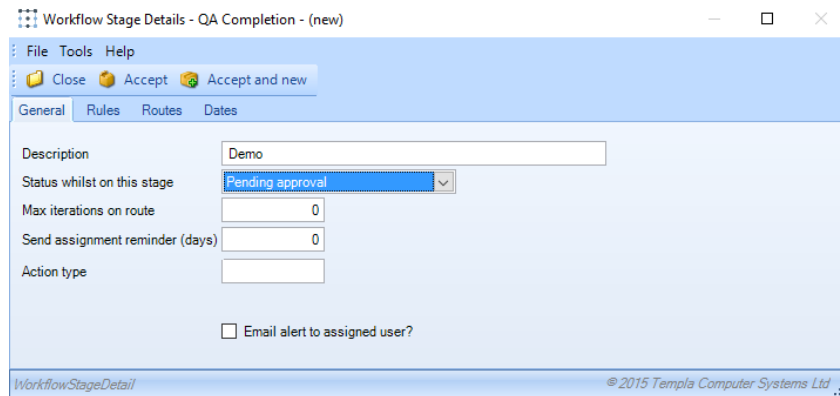
Rules

Rules define how items are processed as they pass through workflow, on most occasions the only check type will be authority required. The user must enter a description for this.

> **NB:** Where a workflow path is being set up for Contract approval *TemplaCMS* allow specific rules to be defined based on each element that can be amended on the contracts. The user should add each required rule as applicable, while following all other steps detailed in this guide
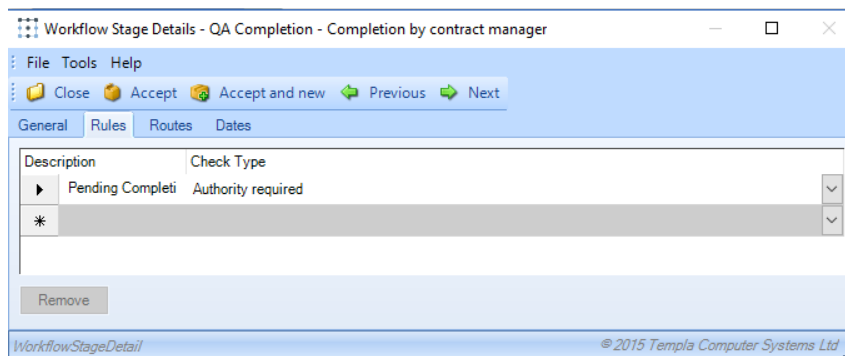
Routes

Routes are used to send workflow items e.g. Data form's to the correct user.

Click **Add** to create a new route or double click on an existing route to make an alteration.
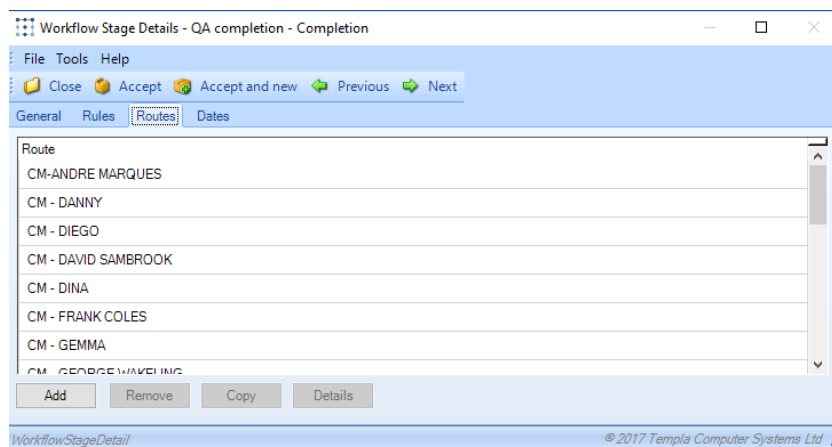
CONNECTING A ROUTE TO A BUSINESS ANALYSIS CODE – ROUTE (GENERAL)

Enter a relevant description and then choose the business analysis level that applies to this route from the drop down e.g. *Area manager, Regional manager* etc. This will then filter the options shown when clicking the binoculars on the adjacent field to only codes which exist at that level, choose the code which corresponds to the user the route is being set up for.

CONNECTING A ROUTE TO A USER

Nodes relate to the level of the user on the route e.g. the users on the lowest node will receive the workflow item and be responsible for its completion. Users on higher nodes will be able to view the items after they are assigned but are not responsible for completing them.

> *NB:* **Where multiple users exist on a node the items will be shared evenly between them i.e. One item to each.**

Click **Add** or double click on an existing node to add/ change users.

Nodes (General)

Enter a relevant description, all other fields can remain blank.

Nodes (Users)

Add a user from the list displayed when clicking **Add** or highlight a user and click remove as necessary.
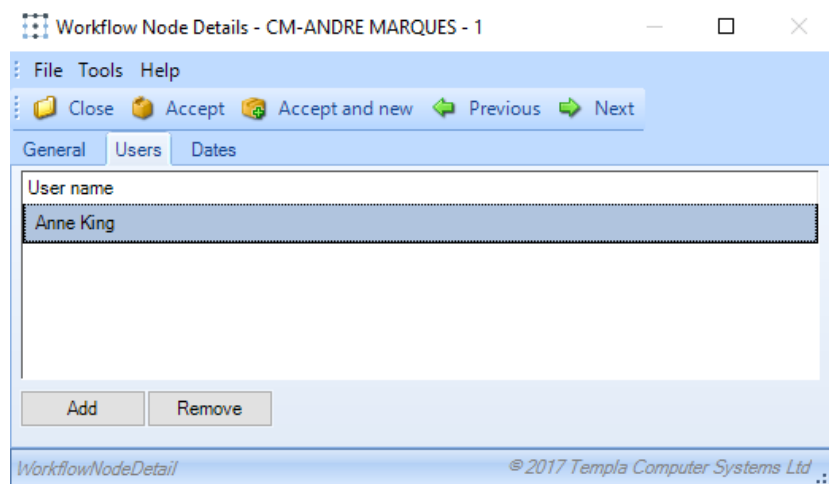
Once the correct user has been selected the user must click **Accept.**

After the required nodes have been added users will return to the Workflow route window, and should click **Accept** once all required routes have been added. Then click on **Accept** on the stages window, again after ensuring all required stages have been added.

ADVANCED FORMS – AUTO EMAIL
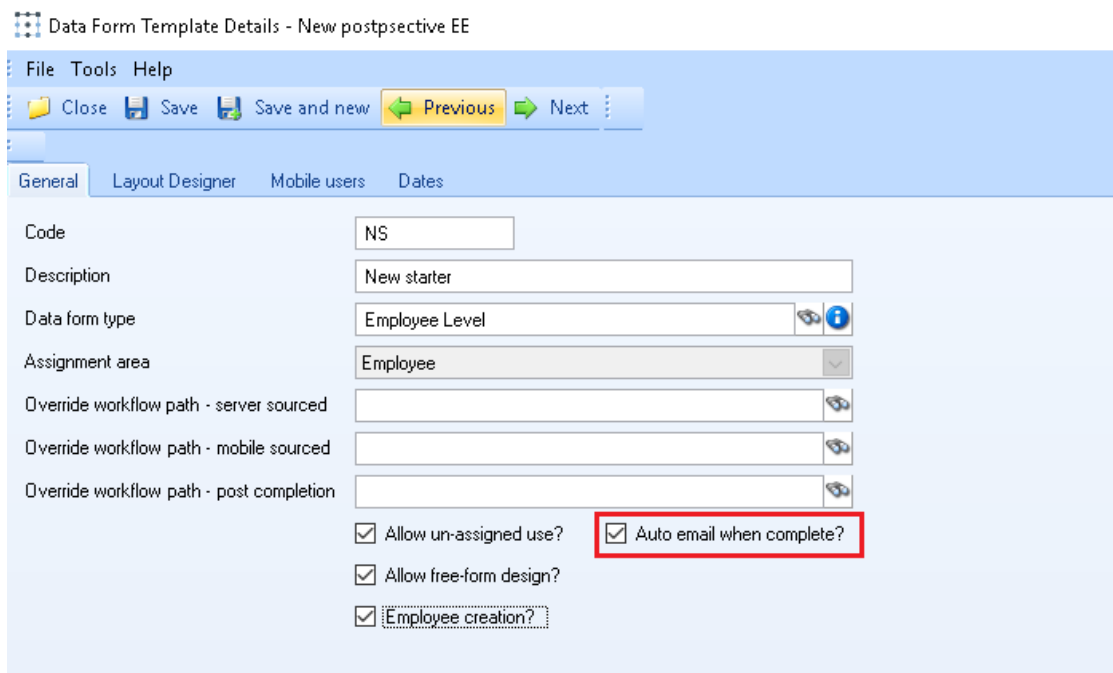
The **Auto email when complete?** option can only be selected on an **Employee** data form.

Note that if the form is ticked for 'allow un-assigned use' (i.e. for the creation of a new employee), then it will be necessary to add a mandatory 'email' linked field to the form details.

Forms will <u>only</u> be auto-emailed at the point the form has been marked as completed (and therefore applied if necessary), and this will be prior to any post-completion workflow, if defined.

Once emailed, a note to this effect will be recorded on the form.

# ADVANCE FORMS ON TEMPLACMS MOBILE APPLICATION V2

From either the site/ employee manager list or specific site/ employee records swipe from the left to the right of the screen to display a list of available modules:
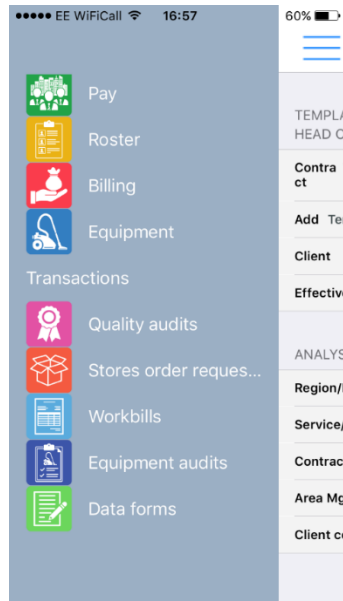
Selecting data forms will display the below screen which allows users to view all data forms which are assigned to them on the "To Do" tab and all other data forms that they have the authority to see on the "All" tab.
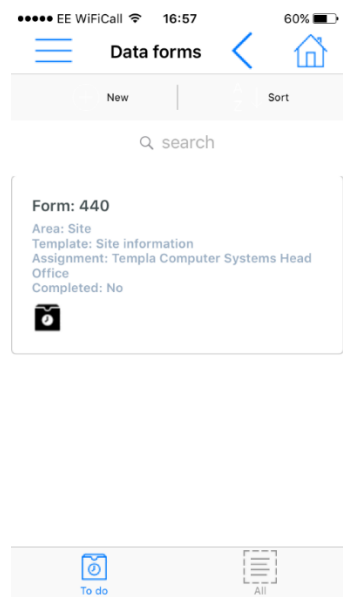
From the above menu, it is also possible to create a new data form based on a template which the user has been assigned to by selecting "New".
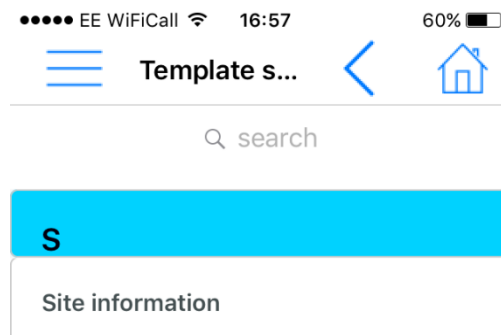
When a specific site/employee is pre-selected the assignment field will be automatically populated with this information on the "Header" tab.

The "Results" tab will display portray the form exactly as it was created within TemplaCMS, where a field is mandatory this will be outlined in red.

On the "sign off tab" there are several options available within the sign off field, these are:

- Not signed – no one has signed to mark the form as complete
- A list of contact names – if there are contacts assigned to the site within CMS
- Someone else – allows the user to enter text into the "Name" field to identify who has signed the document as complete

APPENDIX A: LINKED FIELDS

- **Client / Prospect**
  - Code
  - Name
  - Address
  - Town
  - County
  - Post code
  - VAT code
  - User defined properties
- **Site / Prospect**
  - Client
  - Code
  - Name
  - Address
  - Town
  - County
  - Post code
  - Working weeks per year
  - DBS check required?
  - User defined properties
  - Business analysis codes
  - Marketing analysis codes
- **Supplier / Prospect**
  - Code
  - Name
  - Address
  - Town
  - County
  - Post code
  - VAT code
  - Settlement terms
  - User defined properties
- **Contract**
  - Reference
  - Start date
  - End date
  - Site
  - Description
  - Calendar
  - User defined properties
- **Equipment item**
  - Code
  - Description
  - Category
  - Last/next PAT test dates
  - PAT test frequency
  - Purchase date
  - Purchase cost
  - Asset number
  - Current Site
  - User Defined Properties

- **Employee / Prospect**
  - Title
  - Forenames
  - Surname
  - Address
  - Town
  - County
  - Post code
  - Gender
  - Date of birth
  - Telephone
  - Email
  - Mobile number
  - Payroll number
  - NIC number
  - Joined date
  - Left date
  - Bank name
  - Bank branch
  - Account name
  - Sort code
  - Account number
  - Emergency contact name
  - Emergency contact number
  - Contract assignment
  - Planned Event
  - P46 details
  - User defined properties
- **Product**
  - Code
  - Description
  - Category
  - VAT code
  - COSHH?
  - Monitored?
  - Non-stock?
  - Ad-hoc?
  - Creates equipment?
  - Equipment category
  - Purchase unit and qty
  - Sales unit and qty
  - Stock unit
  - Preferred supplier
  - Supplier part number
  - Supplier cost
  - Min/max order qty
  - User defined properties

GLOSSARY OF TERMS

Data form – the resultant data form for an area, built from the selected *data form template*

Data form type – allows classification of data form templates

Data form template – the design of a *data form*, requiring a *data form type*, printing criteria and the assignment of data items

Linked field – a field linked to a data field within TemplaCMS

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