

# TemplaCMS

## uComply INTEGRATION



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# INTRODUCTION

## Background

These training session notes are designed to provide background information and useful hands-on experience of using the general CMS function. These notes are designed to complement the training and assist you at a later stage when away from the training environment.

## Overview

The **uComply** module allows TemplaCMS to communicate with **uComply** (as Right to Work provider) which it does by building on the existing Advanced Form (AF) functionality, meaning that the Advance Form module is required.

# SYSTEM

## License

The **uComply** module is separately licensed so a relevant license key must be obtained from TEAM Software and applied to TemplaCMS.

## System Control

There are no specific settings on System Control for the **uComply** module.

## Functions and Function Groups

The **uComply** module spans across three fundamental areas of TemplaCMS:

1. Employees – for returned check details.
2. Maintenance – for set up and review.
3. Data Forms – for resulting data forms

The following three function groups could be applied to a user depending on the level of authority required:

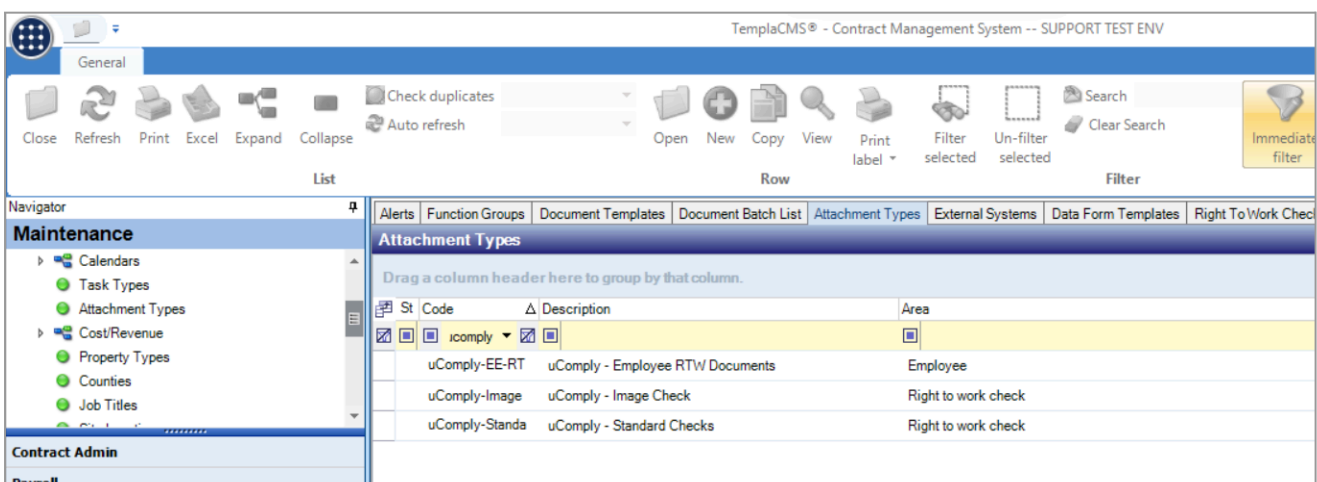
- \*EMP\* – Various function groups that give access to employee details.
- \*MAINT – Maintenance functions which includes the Right to work options.
- \*DATAFORM - Data Form Functions (and which also includes the Right to work options).

It is up to the TemplaCMS administrator to add these (or other bespoke) function groups into their existing function group structure so that only the relevant users see the relevant menu options.

## Attachment Types

Create three new Attachment Types for **uComply**, two being ‘Right to Work check’ attachment types:

- Check Standard attachment type– Used to save the check PDF document against the TemplaCMS check record.
- Check image attachment type- Used to save the employee photo against the TemplaCMS check record.
- Employee standard attachment type – Used to save the check PDF document against the TemplaCMS employee record.



## External System

All configuration on the General tab will be set up by TEAM Software as part of the implementation process to allow communication with **uComply**. This should not be altered once configured.

Via the System Admin > Gateway Admin > External Systems menu option, create a new external system for **uComply**.

On the General tab, define the following:

The screenshot shows the 'External System Details - uComply' configuration window. The 'General' tab is active, displaying the following fields:

- Code: uComply
- Description: uComply
- File format: uComply
- Sleep cycles: 10
- Queue number: 1

Below the General section are two sub-sections:

**Source details**

- Transfer type: none
- Path/URL/DB: (empty)
- User: (empty)
- Password: (empty)

**Target details**

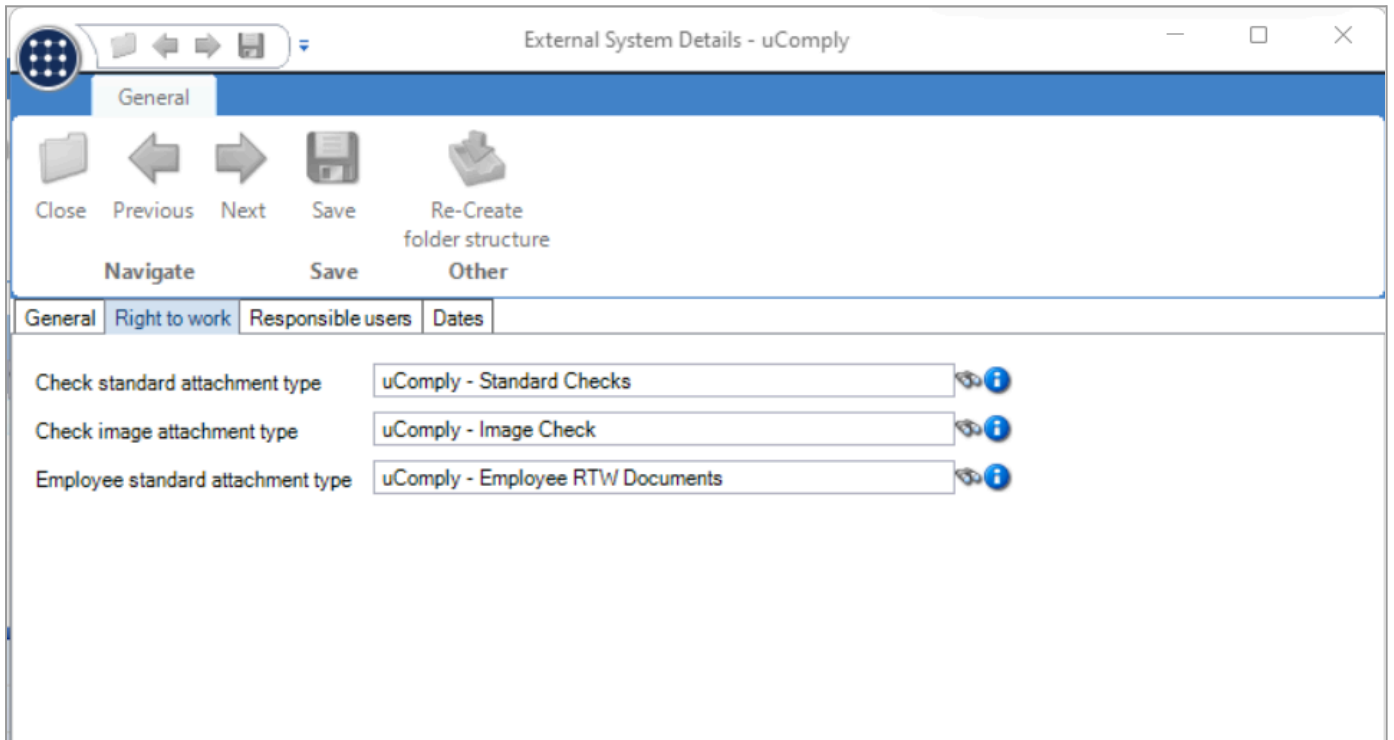
- Transfer type: WebService
- Protocol: Tls12
- Path/URL/DB: https://ucomplyrtwapiproduction.azurewebsites.net/api/v1.0/
- User: (empty)
- Password: (empty)

File format – This will be **uComply**, so the customer will need to be licenced.

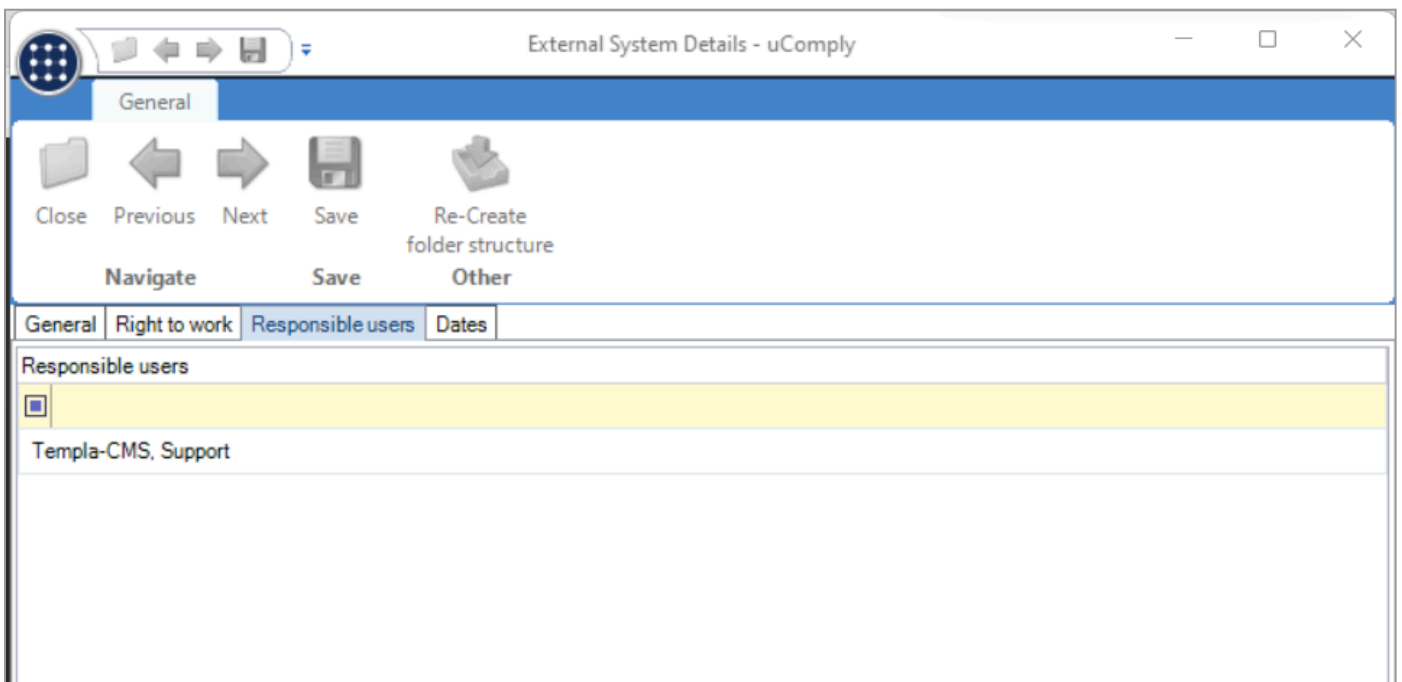
Target Details:

- Transfer details only required.
- User and Password will be provided to the customers.
- Path will remain the same for all customers.

On the Right to work tab, select the previously created attachment types:



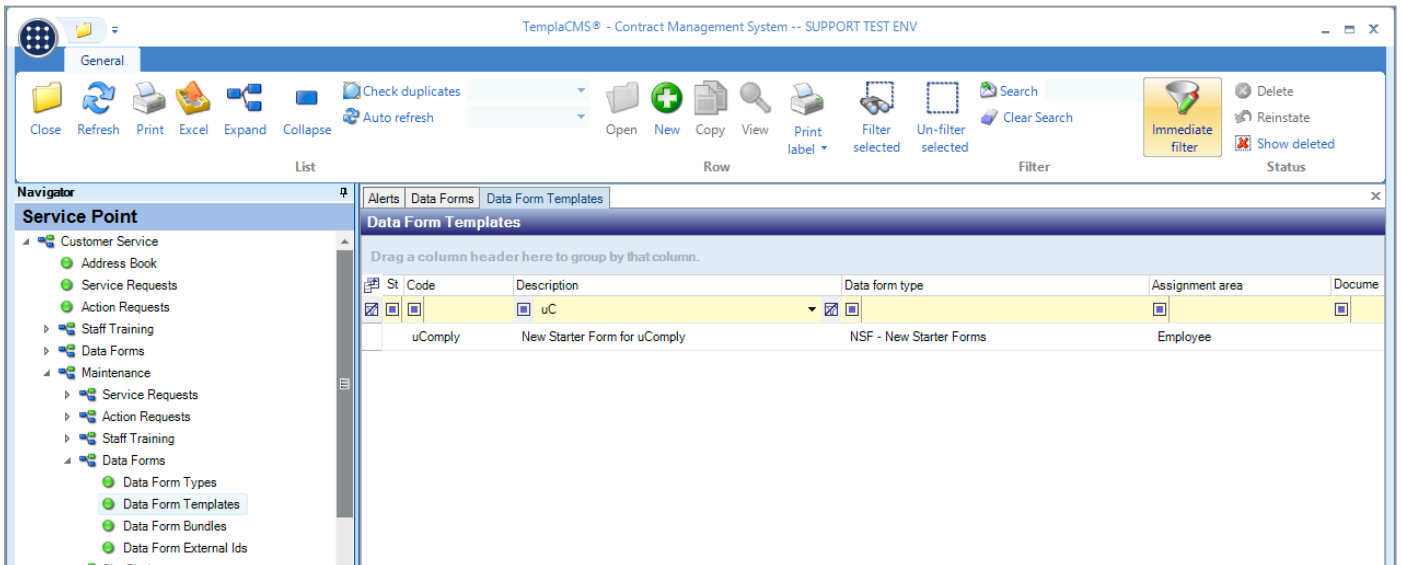
On the Responsible users tab, select the required users to be alerted for all errors:



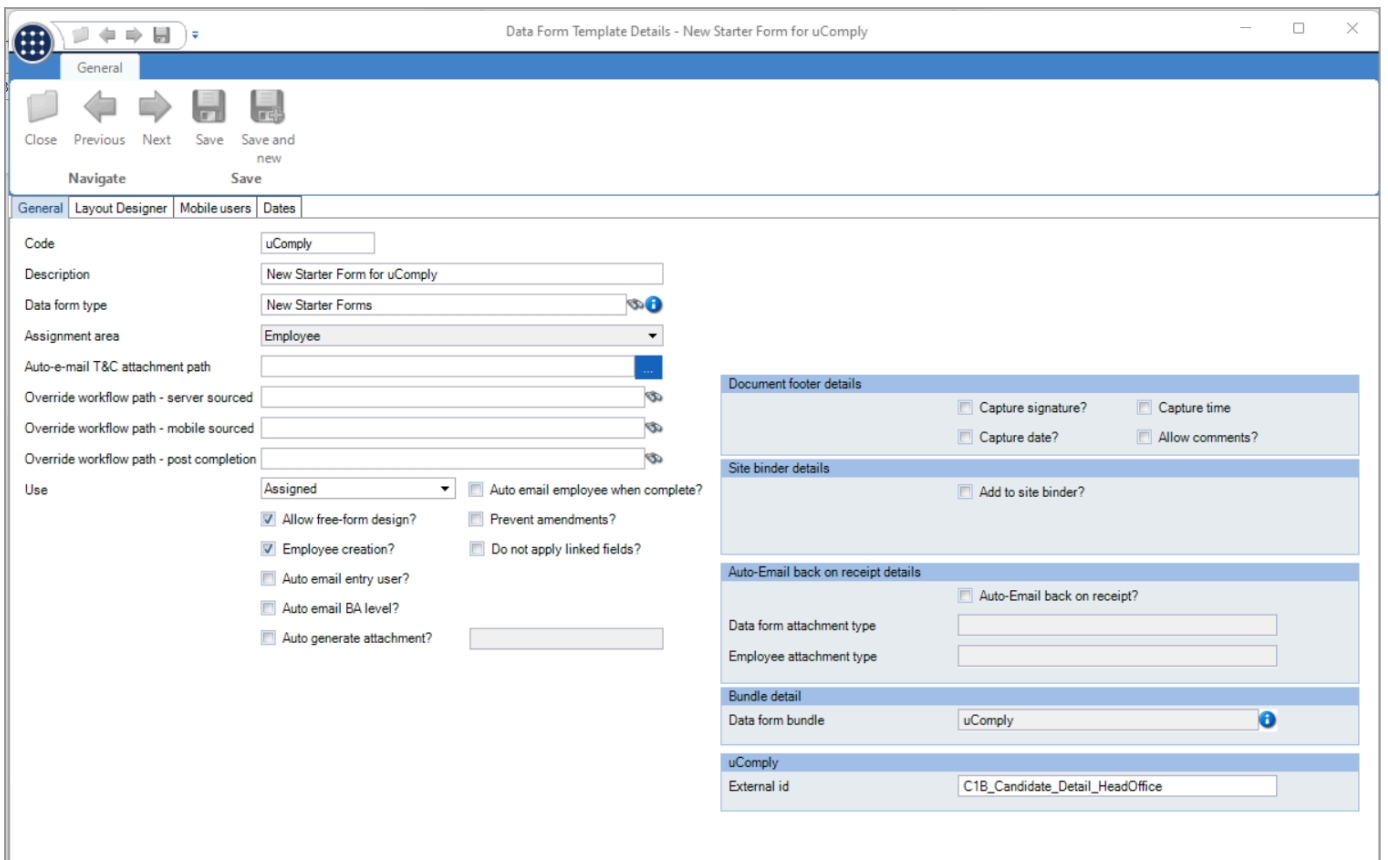
# MAINTENANCE

## Data Form Templates

Via the Service Point > Customer Service > Maintenance > Data Forms > Data Form Templates menu option:



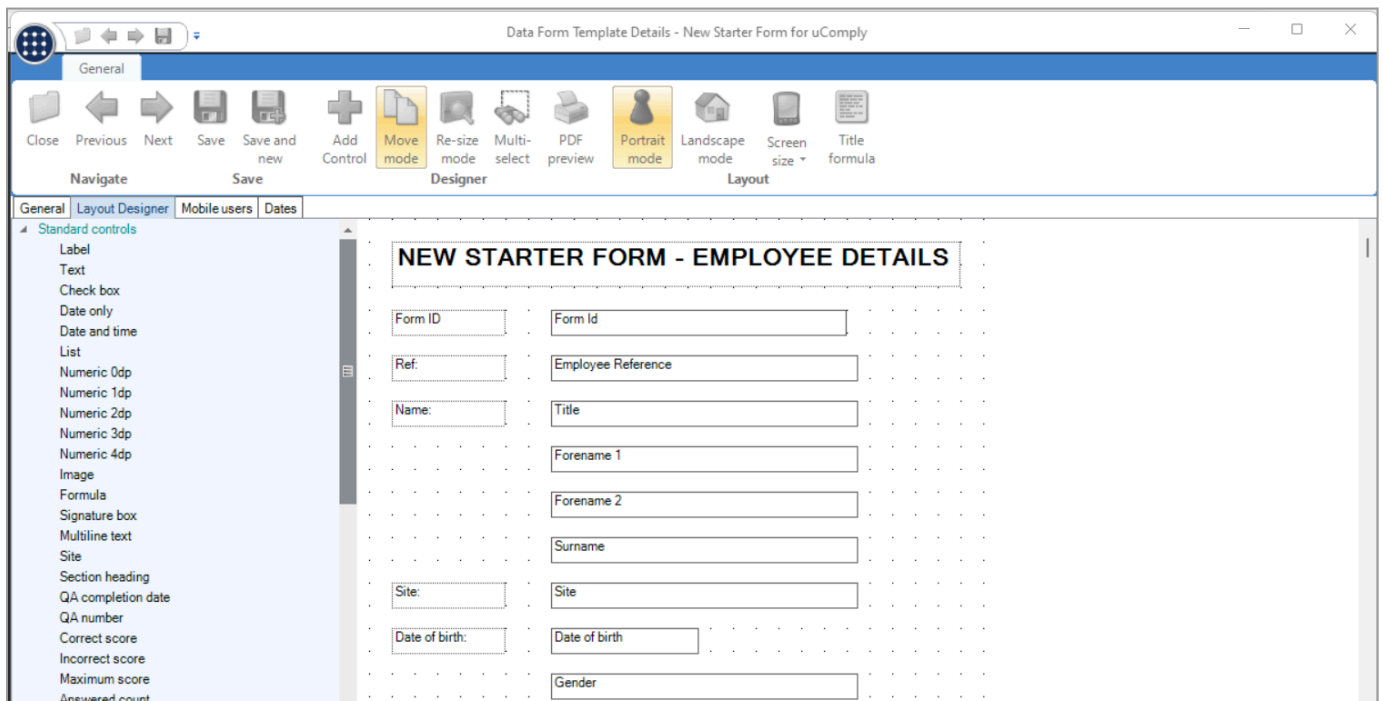
Create a new data form template for **uComply** (which perhaps can be created from an existing new starter form) where for any form flagged on the General tab for Employee Creation?, the **uComply** pane (bottom right) will then display:



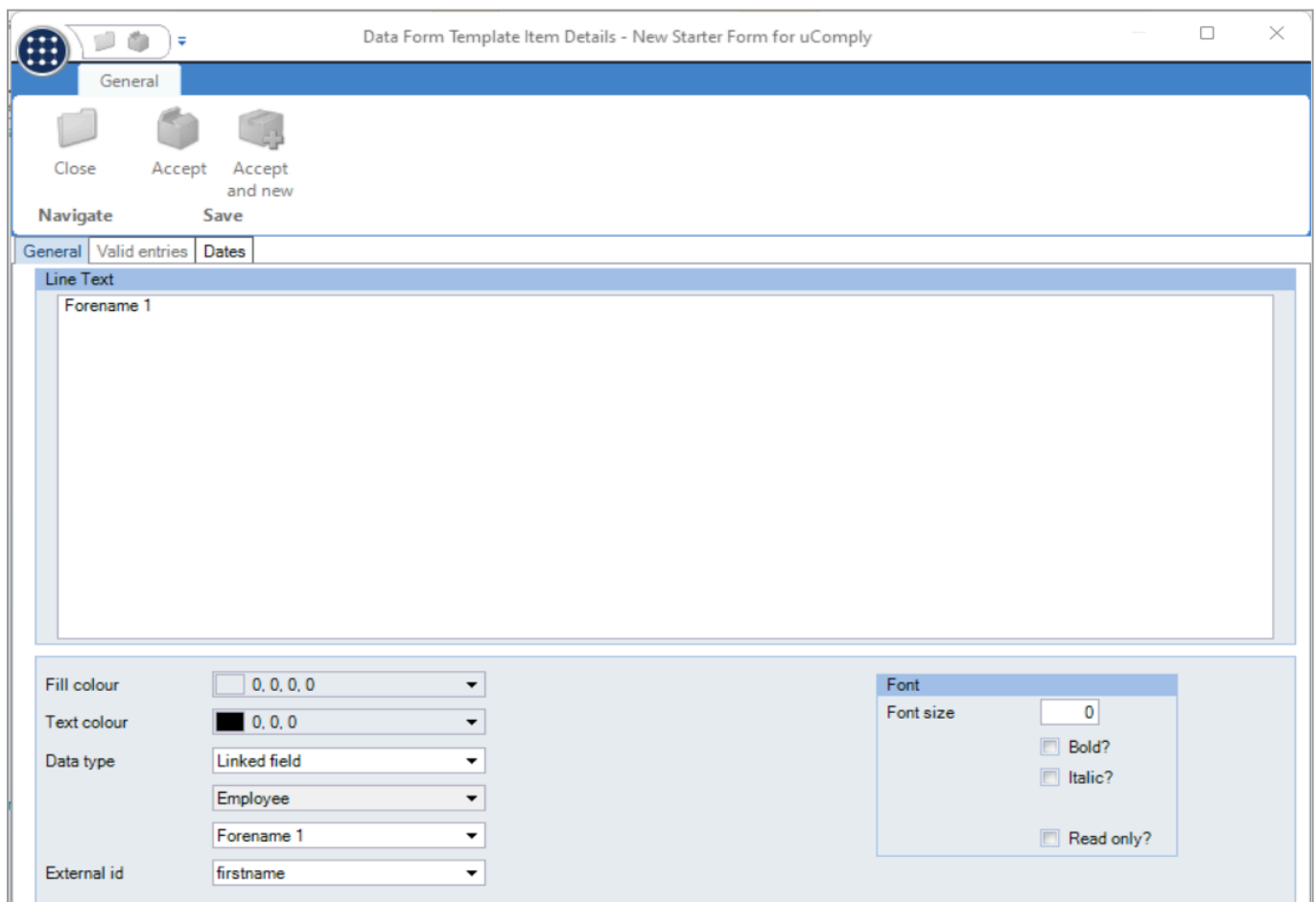
External id – This will need to be set up so that the relevant form is populated dependent on the employee and their location and where **this external id must match the uComply form id.**



On the Layout Designer tab, design the form to include the required fields:



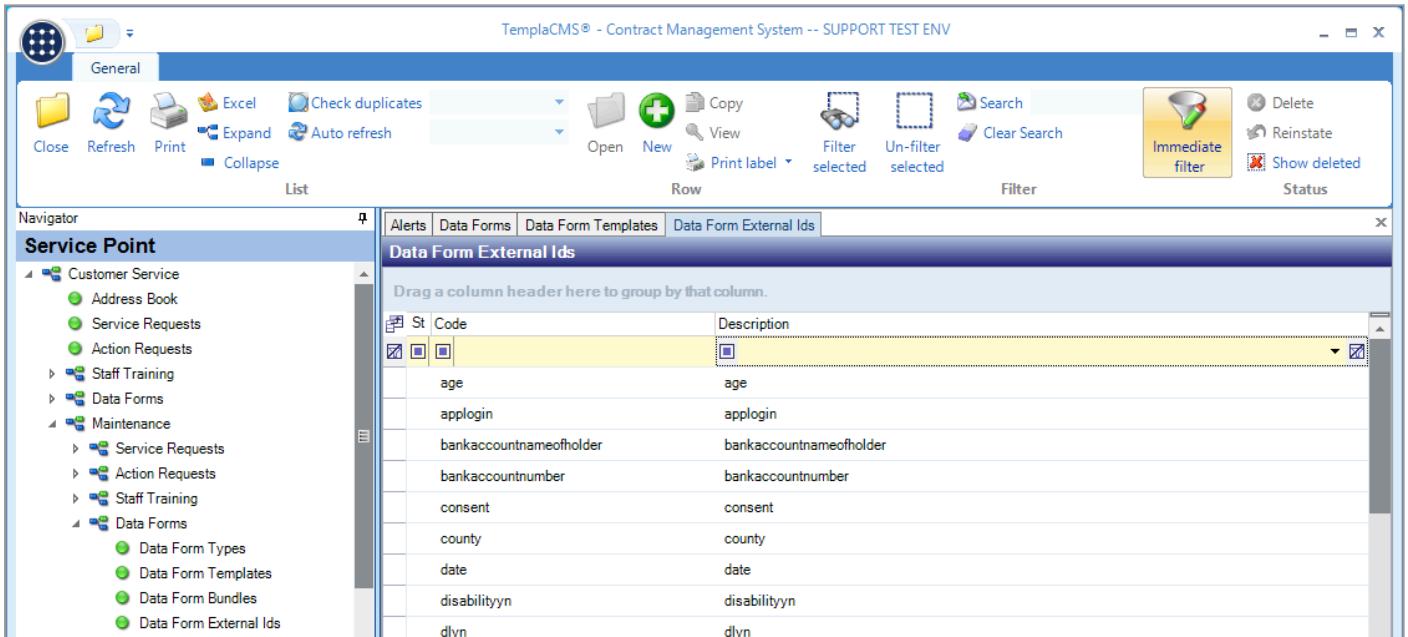
For each field created right-click on the field to use the Edit Control option:



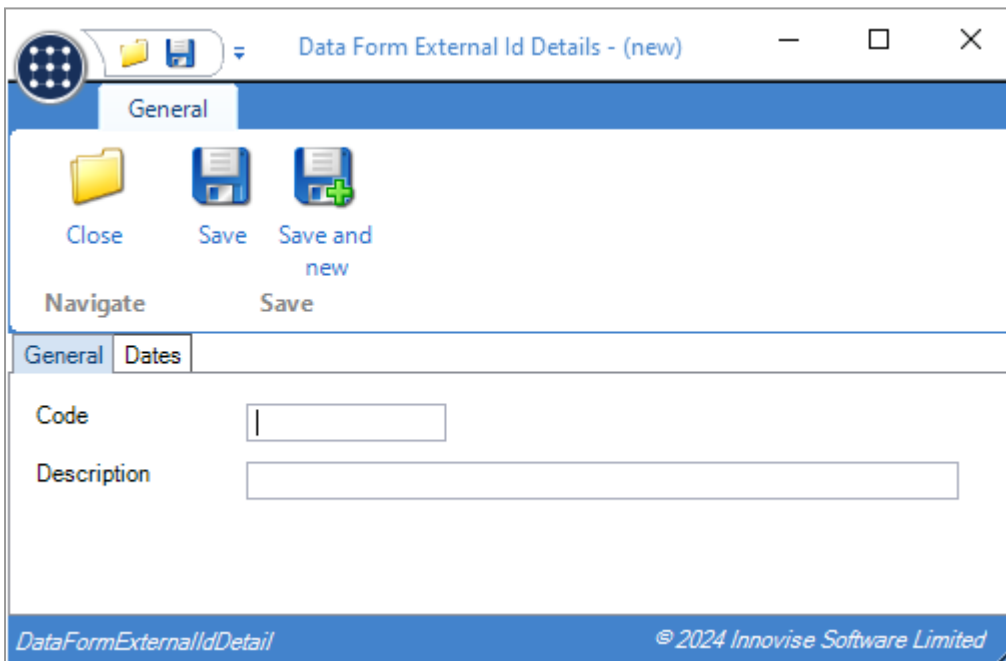
External id – This will need to correspond with the data the customer wants to populate into the Advance Form field from a field on the **uComply** form where the dropdown menu can be used to search for the correct option.

## Data Form External Ids

When a new form is created in uComply, then the first time it is downloaded TemplaCMS will attempt to extract from this uComply form, all the external id's needed for the Data Form controls which means for a new uComply form, an initial download needs to be actioned before a data form template can be completed referencing these external id's. However, via the new Service Point > Customer Service > Maintenance > Data Forms > Data Form External Ids menu option, the list of available external ids can be viewed:

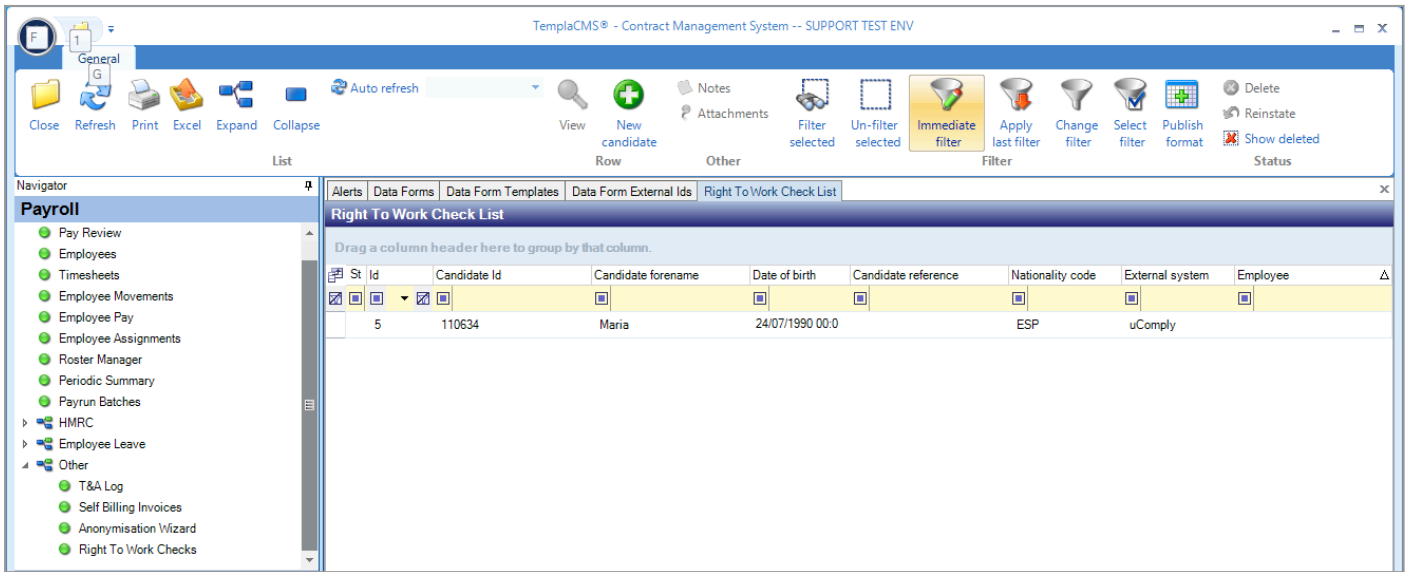


Additionally, if necessary (if the initial download did not manage to locate all the new external ids), new external ids can be manually added where the code must match the external id held within uComply while the external id description can be entered or updated so that it's clear when selected within a data form template, e.g., "dob" to "Date of birth".

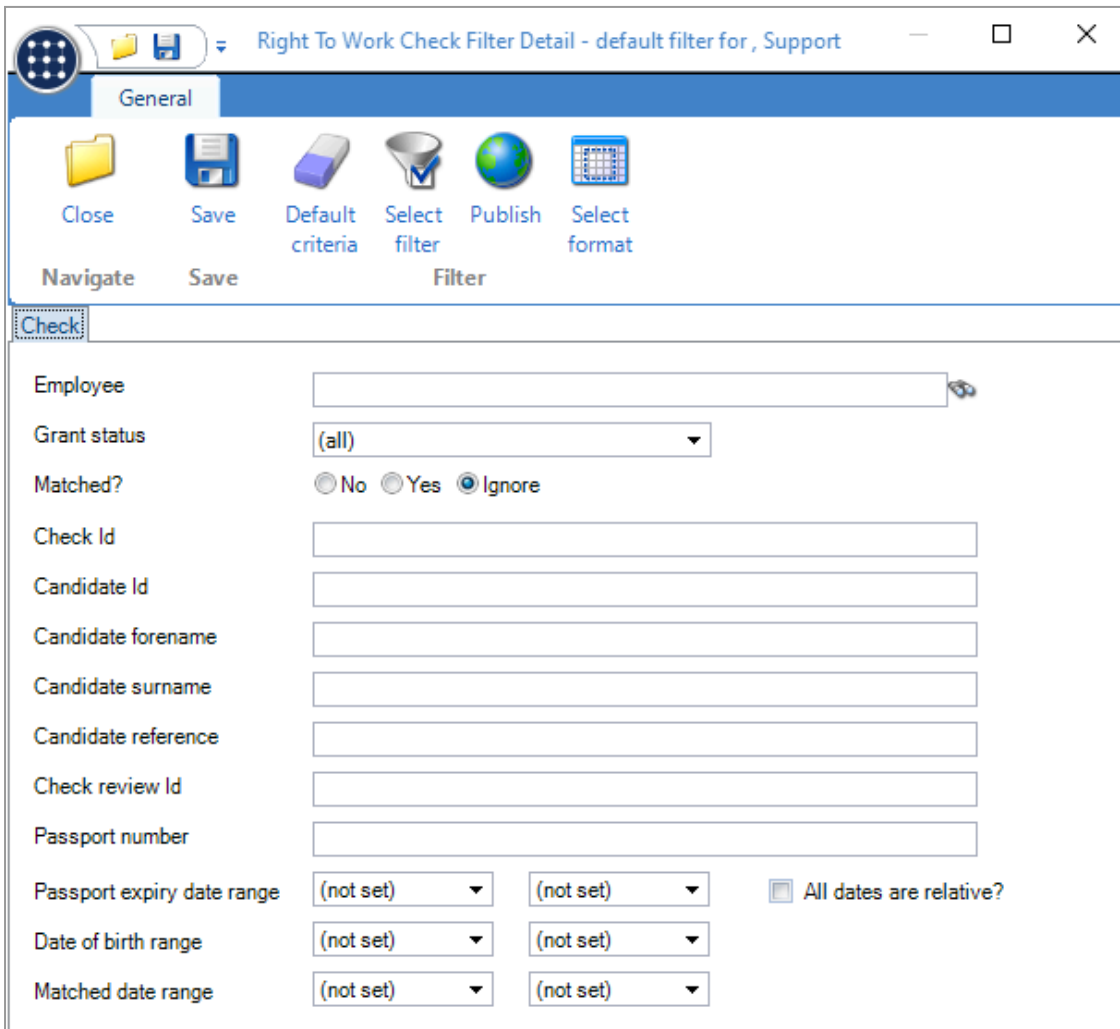


# RIGHT TO WORK CHECKS

To run the **uComply** option, access the Payroll > Other > Right to Work checks menu option:

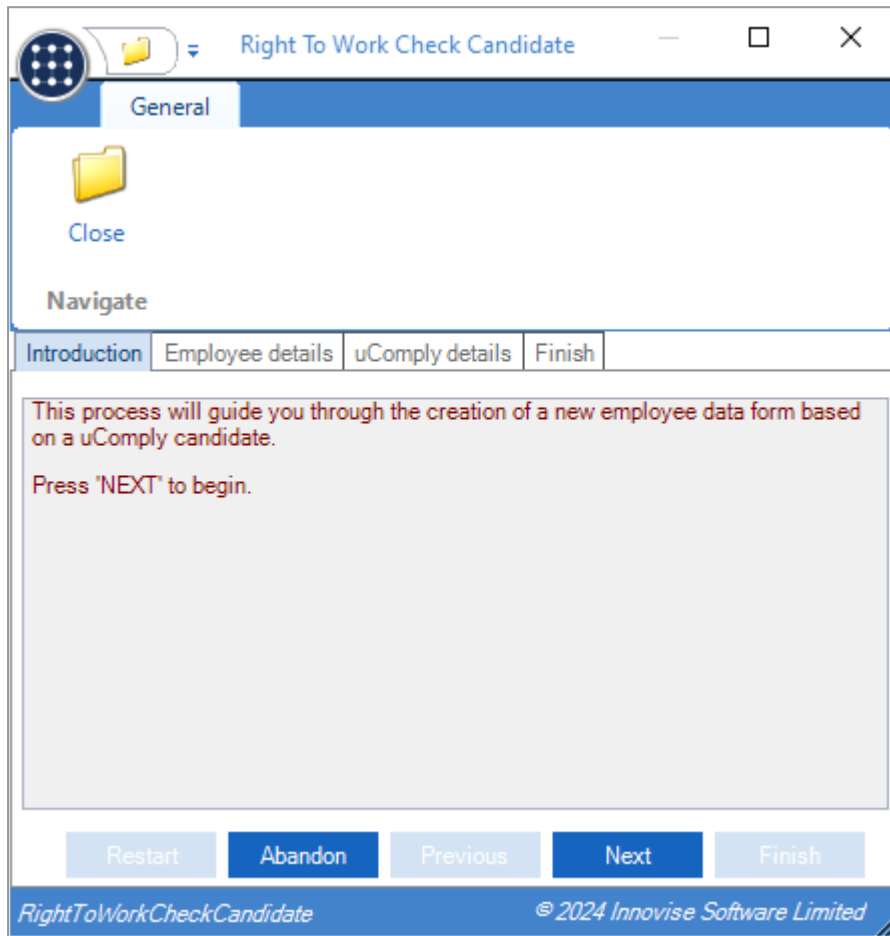


The filter allows the following options:



## New Candidate

Click on New Candidate to add information.



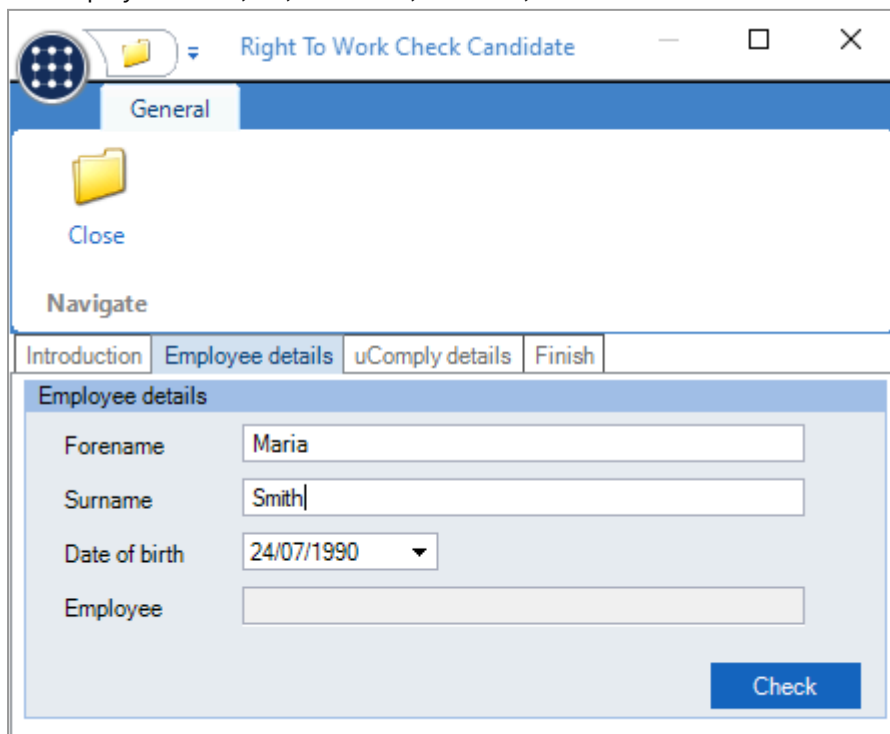
The screenshot shows a software window titled "Right To Work Check Candidate". The window has a blue header bar with a "General" tab selected. Below the header, there is a "Close" button and a "Navigate" section. The main content area displays the following text:

This process will guide you through the creation of a new employee data form based on a uComply candidate.  
Press 'NEXT' to begin.

At the bottom of the window, there is a navigation bar with buttons for "Restart", "Abandon", "Previous", "Next", and "Finish". The "Next" button is highlighted in blue. The footer of the window contains the text "RightToWorkCheckCandidate" and "© 2024 Innovise Software Limited".

Click Next.

Add employee details, i.e., Forename, Surname, and Date of Birth:



The screenshot shows the same software window, but now the "Employee details" step is active. The "Employee details" section contains the following fields:

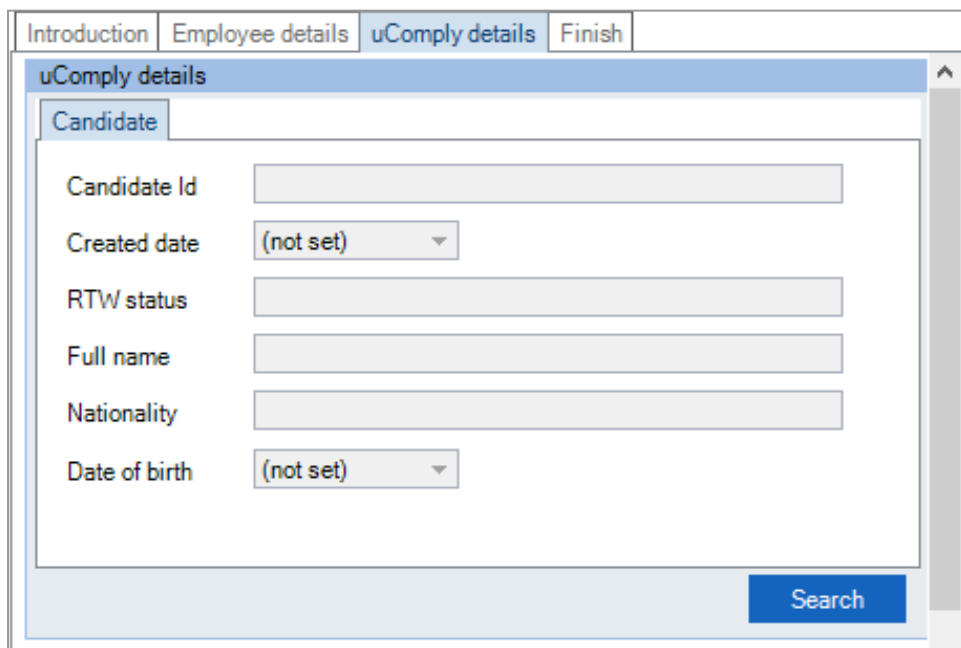
- Forename:
- Surname:
- Date of birth:  (with a dropdown arrow)
- Employee:

A blue "Check" button is located at the bottom right of the "Employee details" section. The "Next" button in the navigation bar is no longer highlighted.

Once data is entered press the tab button to enable the check button then click Check.

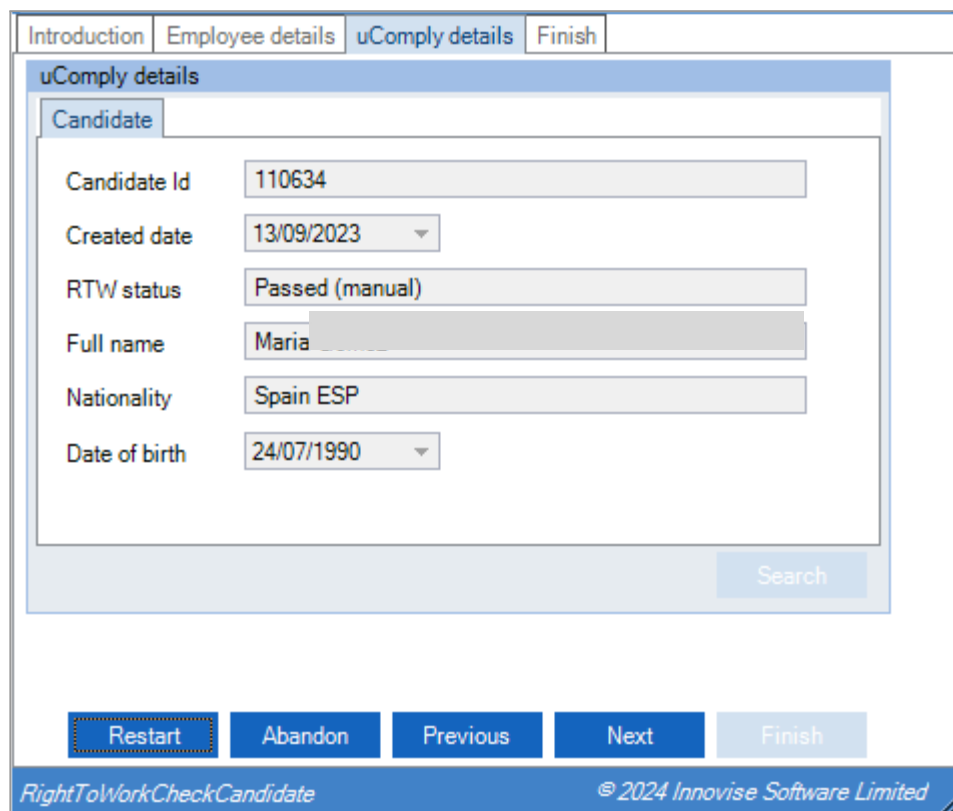
The Check option will determine if the candidate matches an existing employee, showing the user the results and therefore allowing them to abandon the process. If no matches are found, the user will progress to the uComply details tab.

Initially, the screen will be blank, as displayed below:



The screenshot shows a web application interface with a navigation bar at the top containing tabs: "Introduction", "Employee details", "uComply details" (which is selected and highlighted in blue), and "Finish". Below the navigation bar is a form titled "uComply details" with a sub-tab "Candidate". The form contains several input fields: "Candidate Id" (text box), "Created date" (dropdown menu with "(not set)" selected), "RTW status" (text box), "Full name" (text box), "Nationality" (text box), and "Date of birth" (dropdown menu with "(not set)" selected). A blue "Search" button is located at the bottom right of the form area.

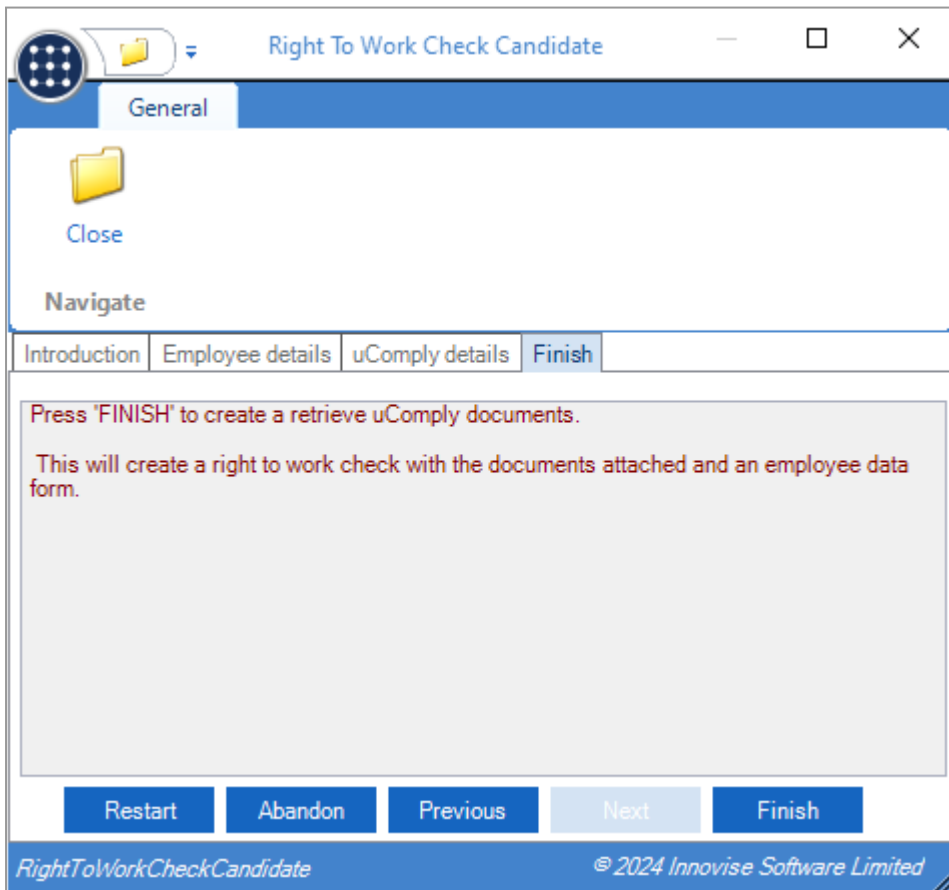
When clicking Search, the fields will be populated if the TemplaCMS webservice can find a corresponding candidate record (sample data below) within **uComply**:



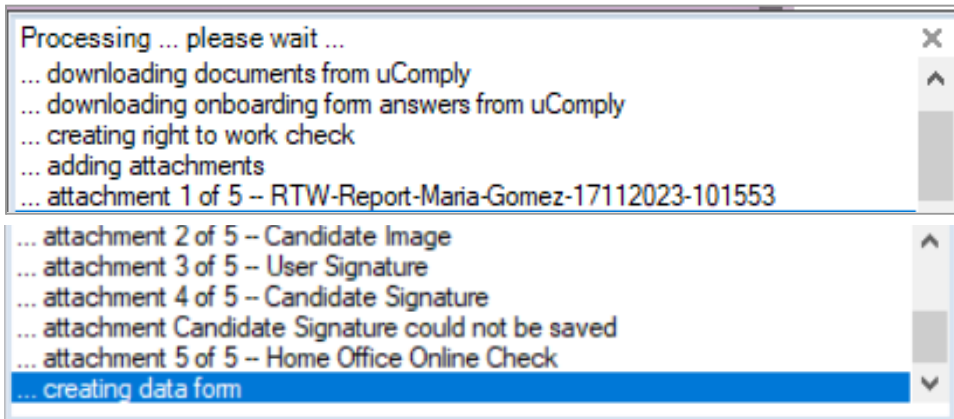
The screenshot shows the same web application interface as above, but the "uComply details" form is now populated with data. The "Candidate" sub-tab is still selected. The input fields are filled with the following values: "Candidate Id" is "110634", "Created date" is "13/09/2023", "RTW status" is "Passed (manual)", "Full name" is "Maria", "Nationality" is "Spain ESP", and "Date of birth" is "24/07/1990". The "Search" button is now disabled and appears as a light grey button. Below the form, there is a row of navigation buttons: "Restart" (highlighted with a dashed border), "Abandon", "Previous", "Next", and "Finish". At the bottom of the page, there is a footer with the text "RightToWorkCheckCandidate" on the left and "© 2024 Innovise Software Limited" on the right.

**Note:** The same candidate details can be entered more than once, so care must be taken not to generate duplicate employees if downloading the data repeatedly and is why the Check option exists.

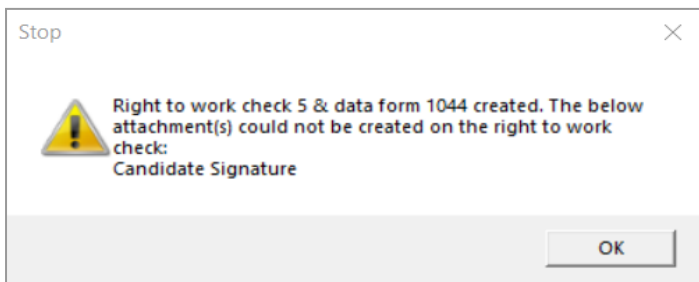
Click Next to view the Finish tab:



Click Finish, whereupon TemplaCMS will run a set of steps to download the documentation and create a data form:

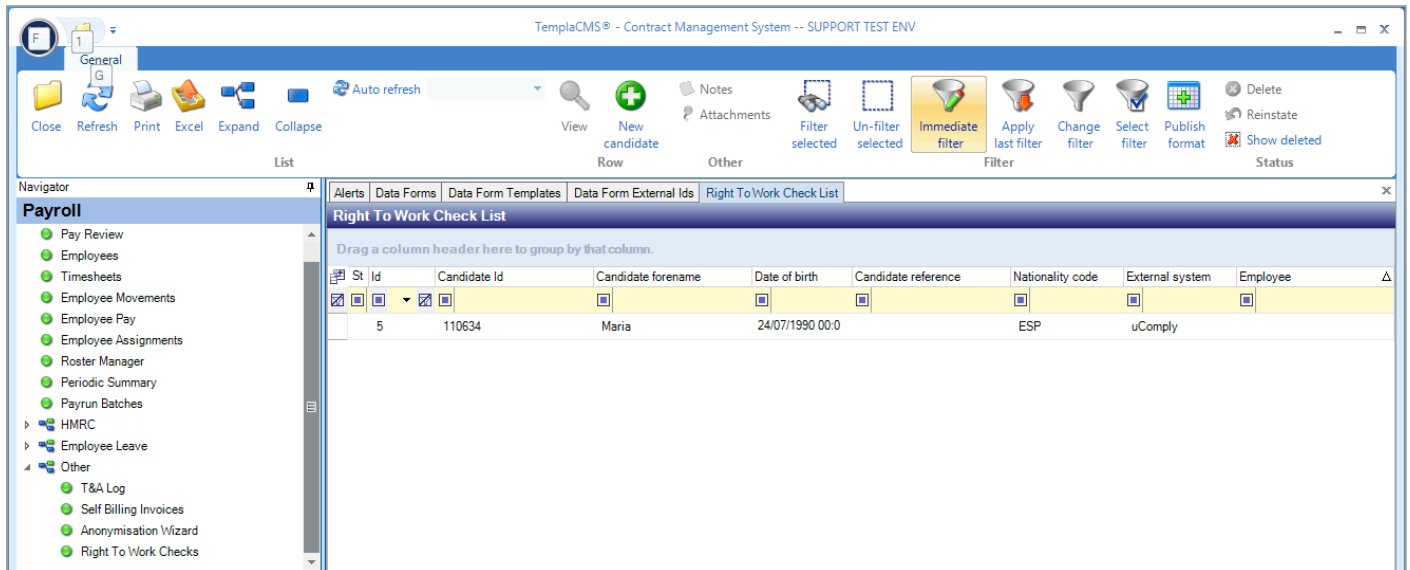


On completion, the message will detail the data form number created:



## Downloaded Candidate Details

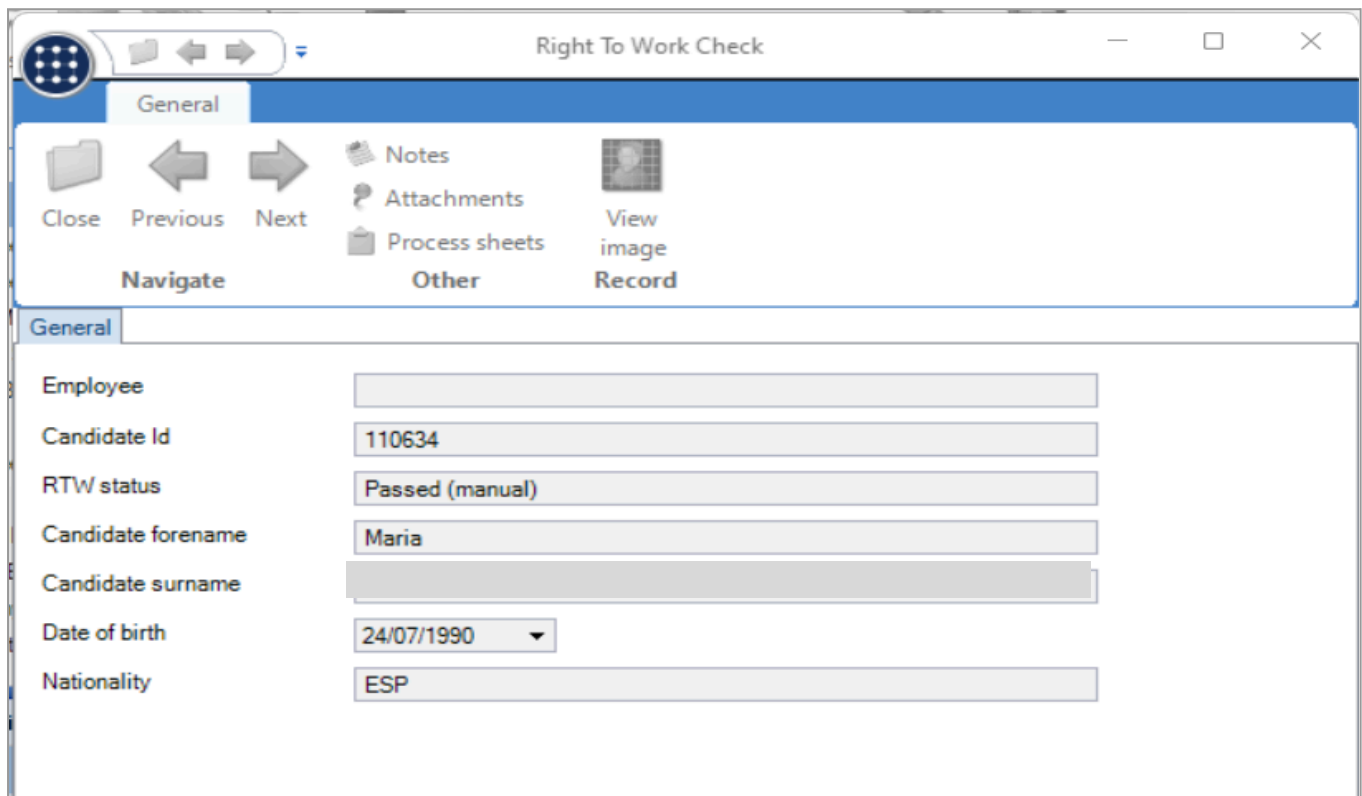
Click on the completed candidate to view documentation and checks that have been carried out.



The screenshot shows the TemplaCMS interface with the 'Right To Work Check List' table. The table has the following columns: St, Id, Candidate Id, Candidate forename, Date of birth, Candidate reference, Nationality code, External system, and Employee. The data row shows: St: 5, Id: 110634, Candidate Id: 110634, Candidate forename: Maria, Date of birth: 24/07/1990 00:0, Candidate reference: (empty), Nationality code: ESP, External system: uComply, and Employee: (empty).

St	Id	Candidate Id	Candidate forename	Date of birth	Candidate reference	Nationality code	External system	Employee
5	110634	110634	Maria	24/07/1990 00:0		ESP	uComply	

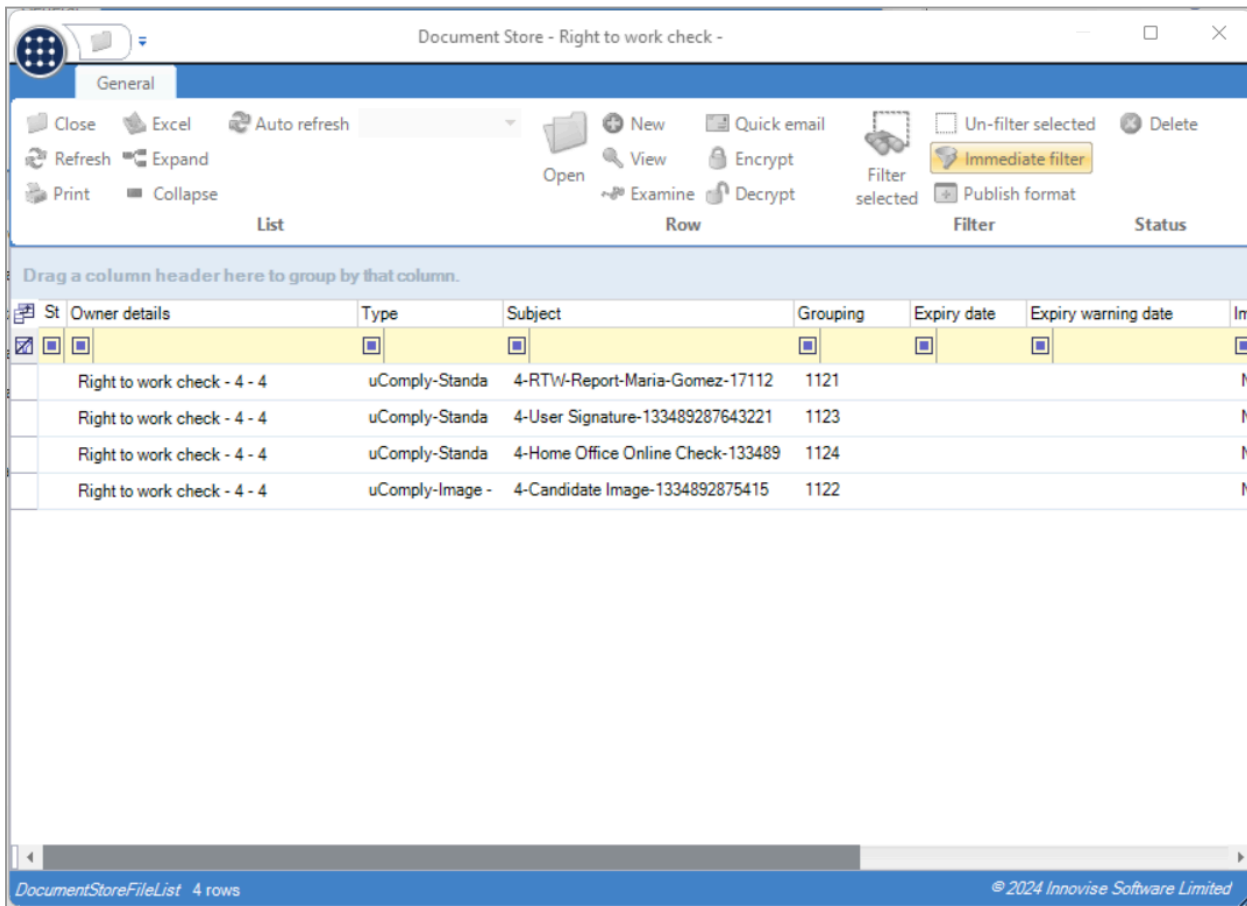
Different attachments can now be viewed by simply clicking on the Attachments option.



The screenshot shows the 'Right To Work Check' form with the following fields:

- Employee: (empty)
- Candidate Id: 110634
- RTW status: Passed (manual)
- Candidate forename: Maria
- Candidate surname: (empty)
- Date of birth: 24/07/1990
- Nationality: ESP

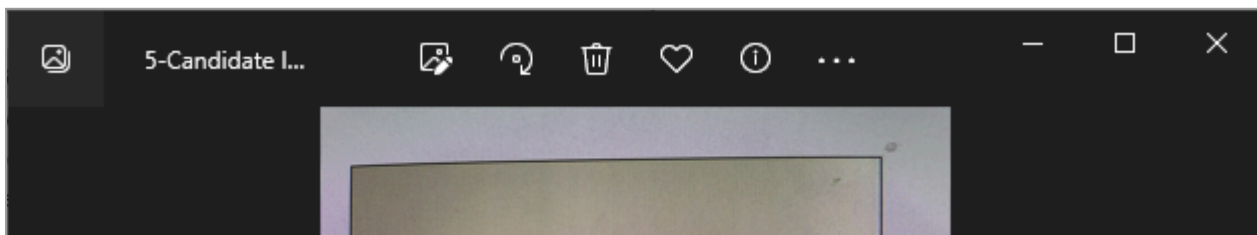
Click Attachments to view the documents that have been created then right-click a document to Examine:



**Note:** These documents:

- Are also available via the Maintenance > Document Management > Document Store.
- Will also appear behind the relevant employee screen (once the employee has been created from the candidate)

Click View Image to view the photo of the candidate:



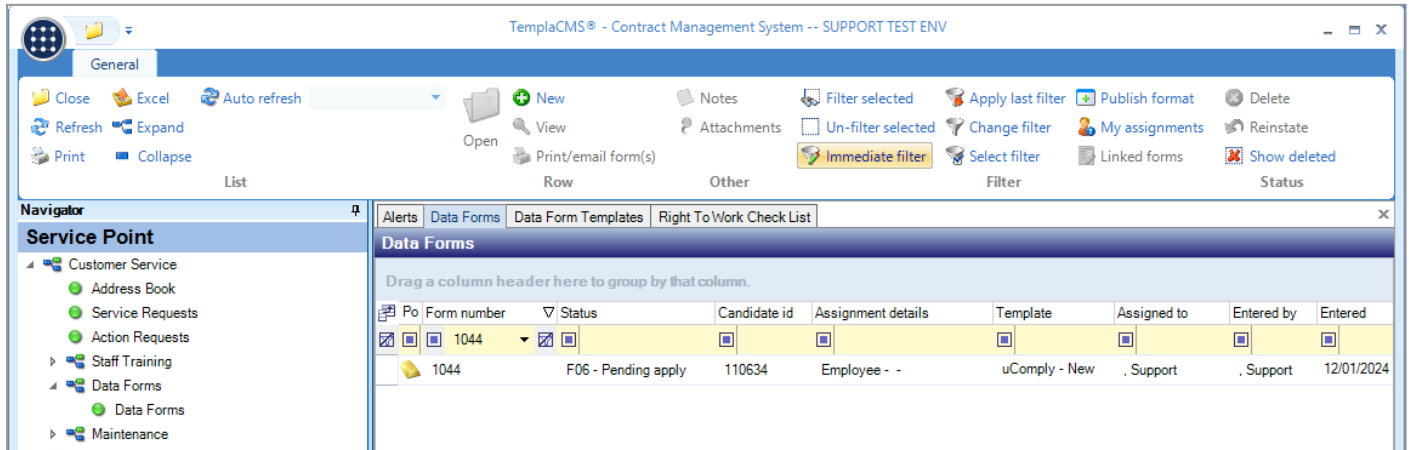


# Auto-Created Data Forms for New Candidates

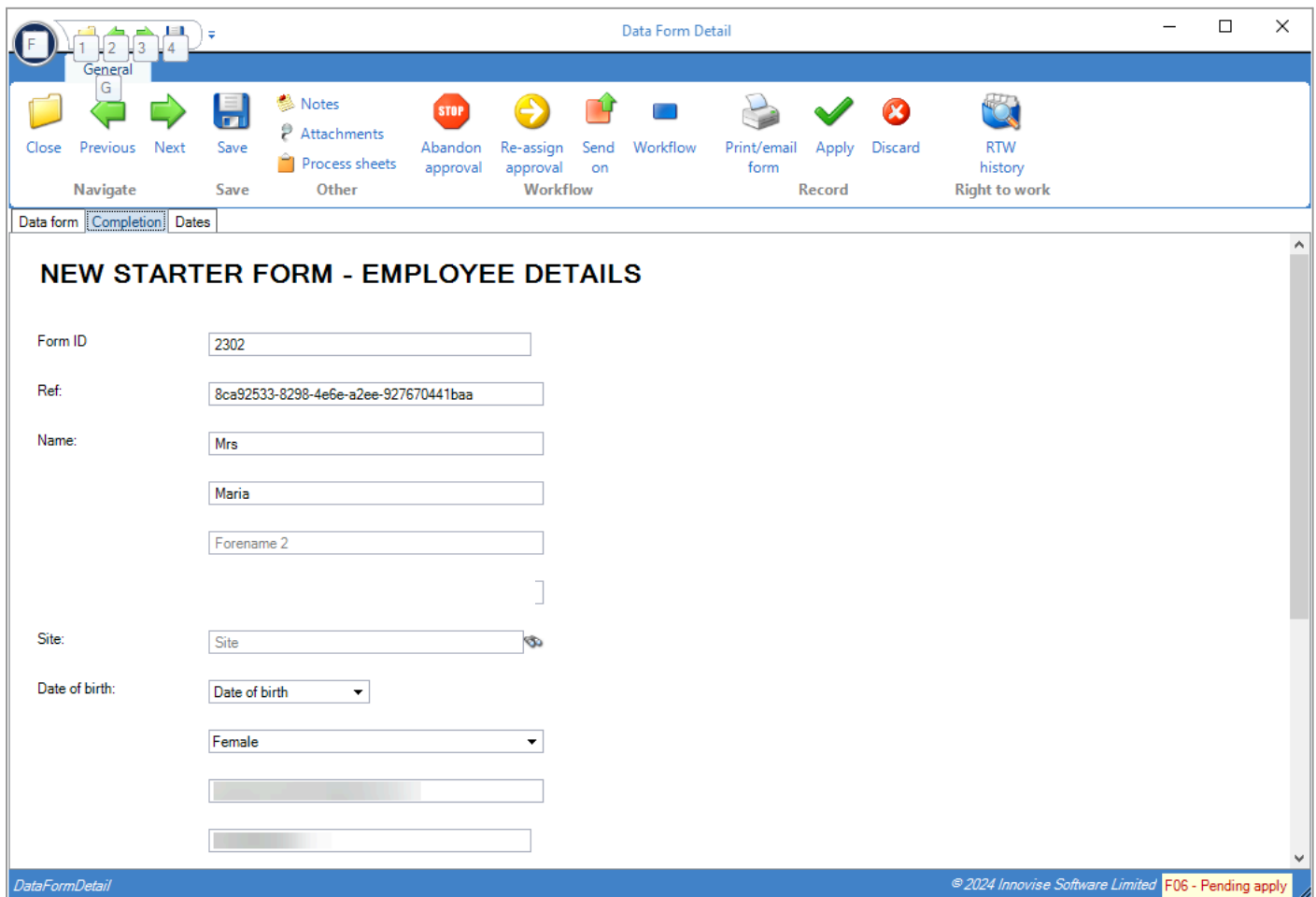
The system has also built a data form as part of the process.

View this via the Service Points > Customer Service > Data Forms menu option, filtering the Data Form List appropriately, e.g., by Added date range, etc.

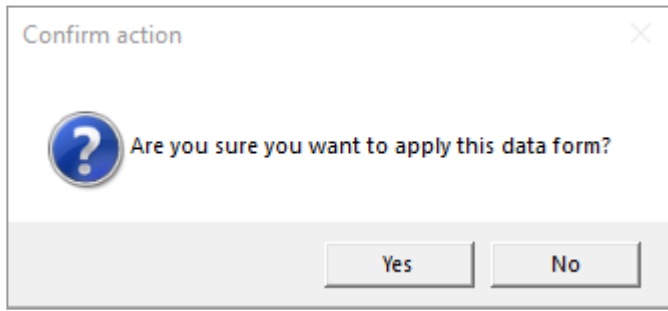
Locate the new data form and double-click to view.



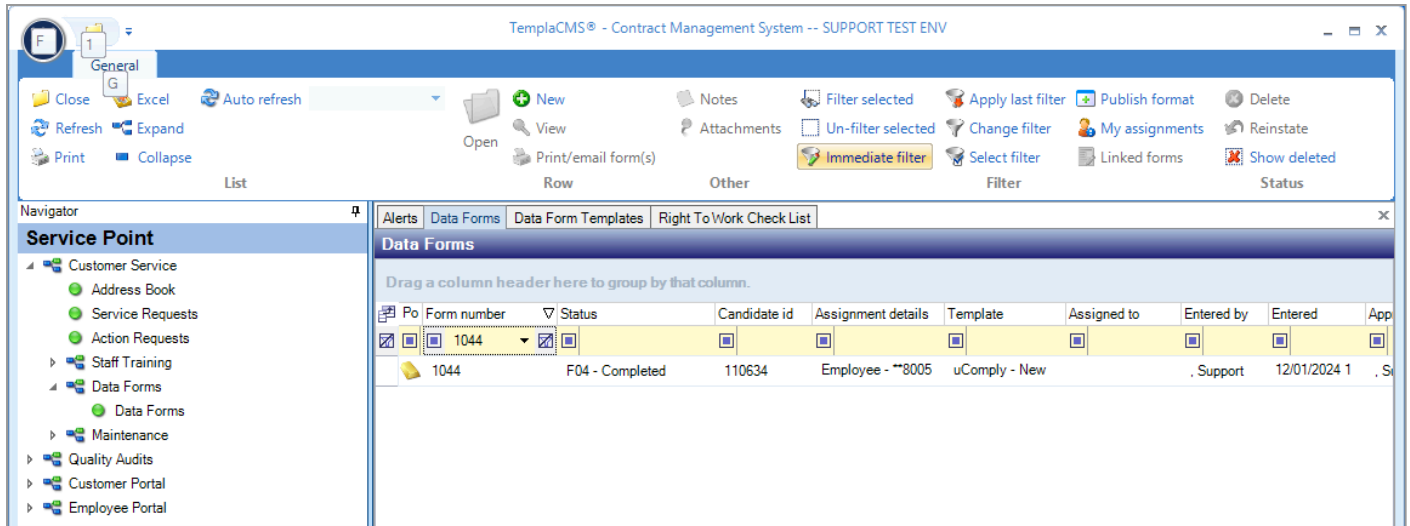
The Data Form for the downloaded candidate can now be displayed.



Click the Apply option to receive the following message prior to loading the TemplaCMS employee screen:



Thereafter, select a payroll and Send to Payroll, and after returning to the Data Forms List, the employee code will be displayed:



Any candidate attachments will also be stored behind the TemplaCMS employee.

**End of Document**



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