



TemplaCMS Newsletter

V6.1.0 | Update 2025.03 | March 2025

COMMERCIAL STATEMENT

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INTRODUCTION

This document details changes made to TemplaCMS and features added this month as an update release following the formal release of version 6.1.0.

All menu paths provided are based on the standard UK menu structure, as such certain options may be found in different locations where the menu navigator has been altered by the client.

Training

Note: Where new functionality has been introduced, it is imperative that a full understanding of the implications for set-up and use are resolved by the client.

In some instances, where the new functionality is minimal, the TEAM Software Customer Success Manager can cover this with the client. However, where the functionality is not minimal or has implications elsewhere in the system, training must be provided by the TEAM Software implementation team to the client, a note to this effect will be added to the relevant sections.

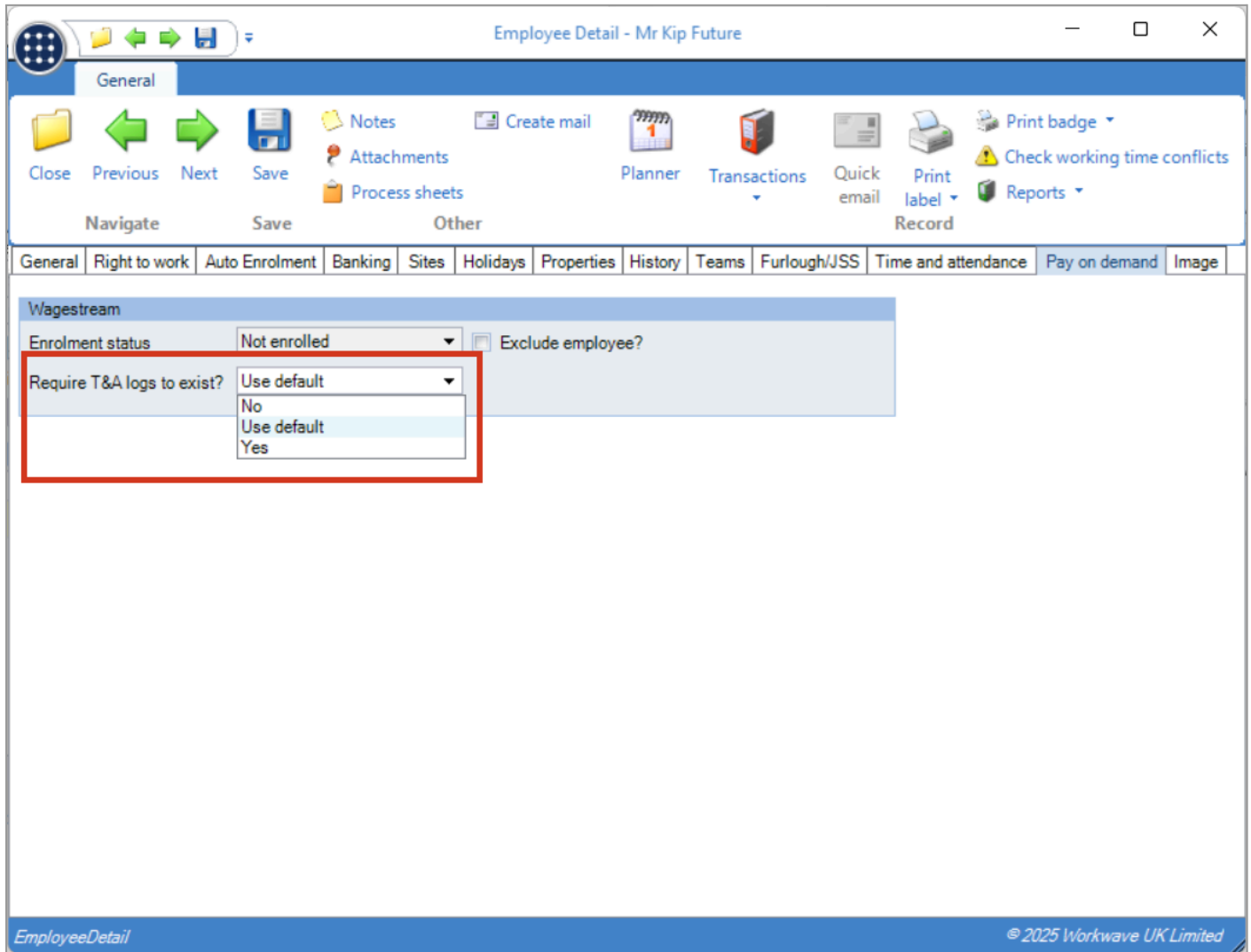
PAY ON DEMAND VARIABLE T&A LOG REQUIREMENTS

Background

When using a Pay On Demand (POD) system, a payroll datasource “Require T&A logs to exist?” checkbox exists for controlling whether pay can be sent to the POD provider. This setting can now be overridden on individual employees.

Employees

Where a POD system has been defined on the payroll datasource to which the employee belongs, a new “Use default” option has been added to the Pay on demand tab.



Note that “Use default” means that the datasource configured option is applied.

When pay is being prepared to be sent to the POD provider, the employee override is used in preference to the datasource-level option.

Using this option, cover employees working at a site with T&A active but who will not log in and out of that site can still have their pay sent to the POD provider, while other employees only have their pay sent if T&A logs exist.

BUDGET REVIEW BATCH

Background

The Budget Review Batch process allows users to perform bulk amendments to budgets based on multiple criteria.

The process has now been amended to allow bulk end-dating of budgets, along with an extension of the export/import functionality.

Budget Review Batch – End Date

A new Change type of “End date” has been added to the Budget Review Batch Detail form. When selected, a new End date field becomes available.

The screenshot shows a web application window titled "Budget Review Batch - (new)". The interface includes a top navigation bar with "General" selected, and a toolbar with icons for "Close", "Save", "Notes", "Budget review items", "Post", and "Delete". Below the toolbar are tabs for "Navigate", "Save", "Other", and "Batch". The main form area has two tabs: "General" and "Extraction". The "General" tab is active, showing the following fields:

- Batch number:
- Description:
- Accounts system:
- Change type: Value Percentage Rebuild Hourly rate Split wage re-align Single wage re-align End date
- End date:

The "End date" radio button and the "End date" text input field are highlighted with red boxes. The footer of the form contains the text "BudgetReviewBatchDetail" on the left and "© 2025 Workwave UK Limited" on the right.

Note that there are no other options for this change type.

When the batch is generated, the End date is used as the date for selecting active contract budgets.

Budget Review Items

When the batch has completed generation and the review items have been created, the Effective date to column can be seen on the item list.

The screenshot shows a window titled "Budget Review Item List" with a "General" tab. The interface includes a toolbar with options like "Close", "Excel", "Auto refresh", "Refresh", "Expand", "Print", "Collapse", "List", "Row", "Fil...", "St...", "Excel", "Create import template", and "Import template". Below the toolbar is a table with the following data:

| Current value | | | | | Contract weekly employees | | End date | |
|---------------|-------|-------|-------|---------|---------------------------|------|-------------------|------------------|
| Thu | Fri | Sat | Sun | Total | Value | Hour | Effective date to | Note |
| 0.00 | £0.00 | £0.00 | £0.00 | £100.00 | £0.00 | | 31/12/2025 | Review batch 725 |
| 0.00 | £0.00 | £0.00 | £0.00 | £200.00 | £0.00 | | 31/12/2025 | Review batch 725 |
| 0.00 | £0.00 | £0.00 | £0.00 | £300.00 | £0.00 | | | |

Review items can be opened and the Effective date to altered from that set by the batch End date, with validation to prevent the date being beyond the end of the associated task.

The screenshot shows a window titled "Budget Review Item" with a "General" tab. The interface includes a toolbar with options like "Close", "Previous", "Next", "Save", and "Delete". Below the toolbar is a form with the following fields:

Batch: test2703
Contract: WITESTNEW
Description: test 2
Budget group: More revenue!
Budget period: 1 Months
Linked pay scale: [empty]

End date
Effective date from: 01/01/2023
Effective date to: 31/12/2025

Reason for change: Review batch 725, end date

On posting an End date Budget Review Batch, the existing budget lines are end-dated and no new budget lines are created. Note that if a primary budget line is end-dated, then related secondary budget lines are also end-dated.

Budget Review Items – Export Template

When creating an Export template for an End date Budget Review Batch, the Effective date to column is present and is the only column that allows change.

| Q | R | S | T |
|---------------------------|-------|-------------------|----------------------------|
| Contract weekly employees | | End date | |
| Value | Hours | Effective date to | Note |
| 0.00 | | 31/12/2025 | Review batch 725, end date |
| 0.00 | | 31/12/2025 | Review batch 725, end date |

Budget Review Items – Delete Rows on Import

When budgets are imported from an Import Template, the import process checks whether any rows have been deleted in the template. If any rows have been deleted, then the user is prompted to choose whether to delete them.

Confirm action

Rows have been deleted from the import template. Do you want to keep these rows in the batch, or delete them?

Keep
Remove

- **Keep** - This imports the rows from the template, but where rows have been deleted from the template, these are not deleted from the Batch Review Item list.
- **Delete** - This imports the rows from the template, and where rows have been deleted from the template, these are also deleted from the Batch Review Item list.

EMPLOYEE PORTAL - REAPPLY APPROVED REQUESTS

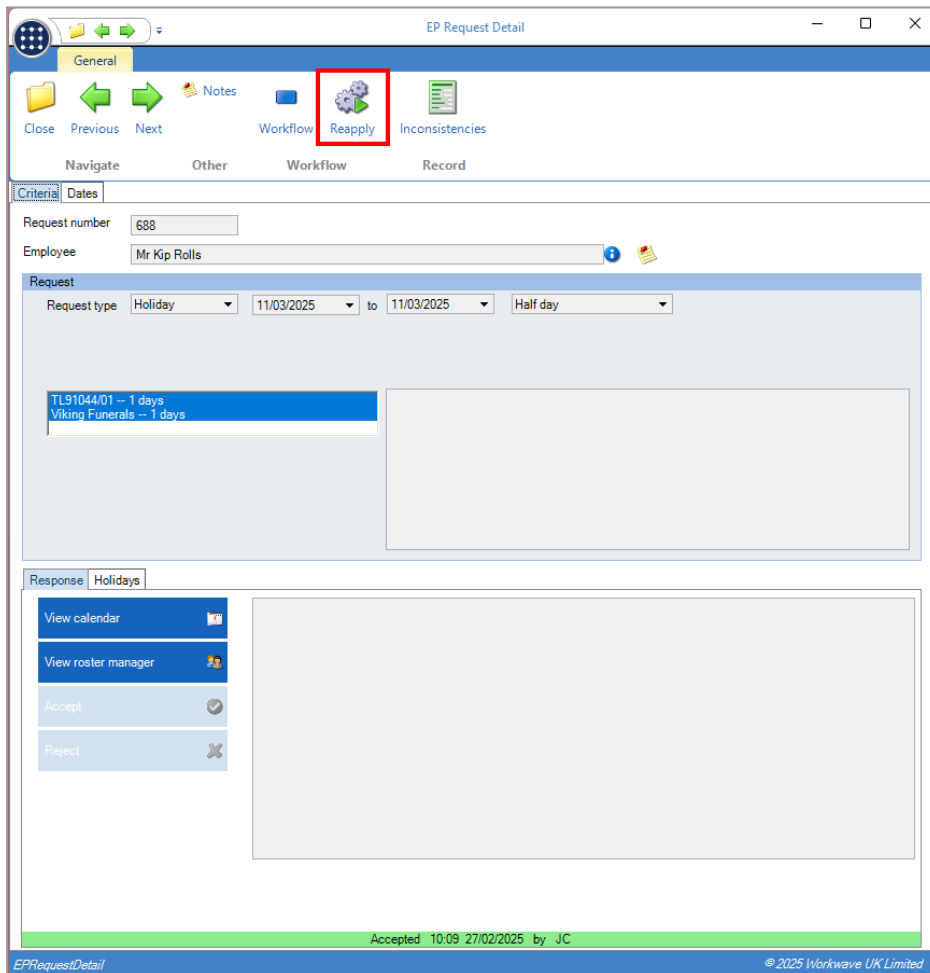
Background

When Employee Portal (EP) requests are approved/accepted via workflow, the application of the request creates the necessary employee plan events for holiday or absence. On occasion these events are subsequently deleted by users (via Roster Manager, Employee Plan, of Timesheets).

A new facility has been added to allow the reapplication of an accepted request in order to recreate the deleted employee plan events.

Employee Portal Requests (EP Requests)

A new toolbar button has been added to the form for EP Request records. This button is only available for requests which have already been accepted.



When clicked, a confirmation displays before the reapply process begins. Unlike the initial acceptance of the request, employees are **not** auto-emailed as part of the reapply process.

Visibility of this button is secured by the following new function:

- EPRequest.Reapply

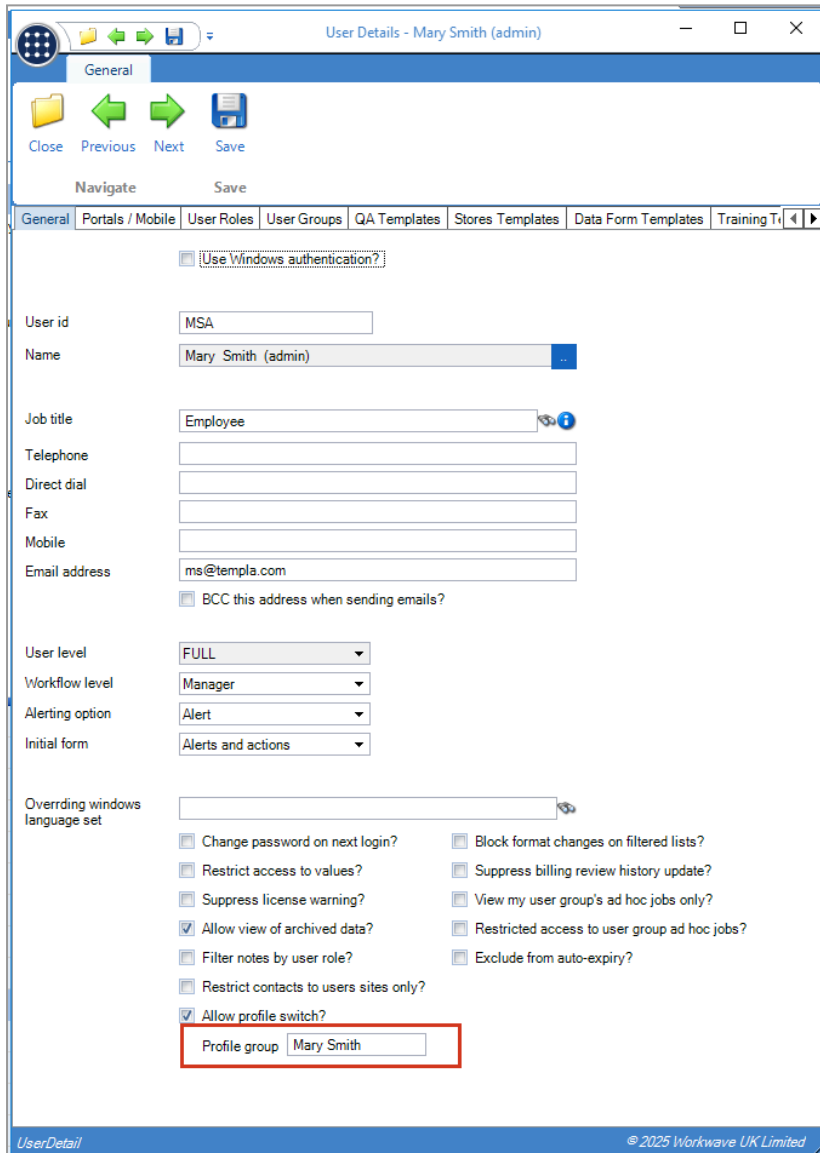
PROFILE SWITCHING – CUSTOM GROUPING

Background

Previously, grouping of users for profile switching was based on the email address being consistent across the users in the group. However, there are scenarios where employees have multiple accounts with different email addresses for the (different operations they work for) but still require profile switching between them.

Users

A new Profile group field has been added to the User Details form. This allows administrators to define custom groupings of users for profile switching purposes.



When a user selects Switch Account from the Templa menu or double-clicks their name in the status bar, the Switch Account popup now displays all users who share the same Profile group value as the current user.

When profile switching is enabled for a user for the first time, their current email address is copied to the Profile group box.

For users who already have profile switching enabled, their existing email address is automatically copied into the new Profile group field during the upgrade process.

STORES ORDERS – UNDELIVERED CANCELLATION

Background

Processes already exist to automatically cancel outstanding items on part delivered stores orders, based on the elapsed days after the part delivery. However, items that were never delivered could result in orders remaining open indefinitely.

New settings have been introduced to handle this scenario.

System Control

New options have been added to System Control > Stores.

The screenshot shows the 'System Control - Stores' configuration window. The 'Cancel Reminders' section is highlighted with a red box. It contains a table with columns for 'Direct', 'Transfer', and 'To stores'. The 'Never delivered' row is set to 60 days for all three categories. Other sections include 'Budgetary control frequencies', 'Documents', 'Defaults', 'Supplier/product cost change tolerance', 'Billing', and 'Transfer costing'.

| Count | Basis | Description | Mobile device and stores order form |
|-------|---------|----------------|-------------------------------------|
| 1 | Monthly | Fixed period | Monthly |
| 2 | Monthly | Rolling period | Rolling quarter |
| 3 | Monthly | Rolling period | Rolling year |
| 4 | Not set | Rolling period | |
| 5 | Not set | Rolling period | |

| Cancel Reminders | Direct | Transfer | To stores |
|--------------------------|--------|----------|-----------|
| On first receipt | No | No | No |
| Part delivered | 5 | 5 | 5 |
| Days after first receipt | 5 | 5 | 5 |
| Never delivered | 60 | 60 | 60 |
| Days after required date | 60 | 60 | 60 |

As with the pre-existing Part Delivered settings, a non-zero entry in Never Delivered enables the processing.

Once enabled, the overnight process that cancels reminders applies these settings. Therefore, any existing orders that meet the criteria have their remaining quantities cancelled.

Note that Never Delivered applies to the line on the stores order that has had no delivery and is past the number of days after the required date, whereas Part Delivered applies to the entire remaining lines on a stores order that has had at least one delivery.

This processing has been implemented on both *Stores Orders* and *Multi-Site Stores Orders*.

MIGRATION WIZARD – CONTRACT BUDGET DAILY VALUES

Background

The existing MIGRATION: Contract Budget option within the Migration Wizard has been extended to include additional daily budget columns, relevant to payroll budgets.

Migration Wizard – Contract Budgets

The spreadsheet generated for the import of Contract Budget details has now been expanded to include the following additional columns:

- Employee count
- Monday hours
- Monday value
- Tuesday hours
- Tuesday value
- Wednesday hours
- Wednesday value
- Thursday hours
- Thursday value
- Friday hours
- Friday value
- Saturday hours
- Saturday value
- Sunday hours
- Sunday value

The new columns are only relevant if:

- The frequency period is set to one week.
- A payroll budget group is used.
- The period level value and hours are not set.

AUTO PAY ACCRUED HOLIDAY

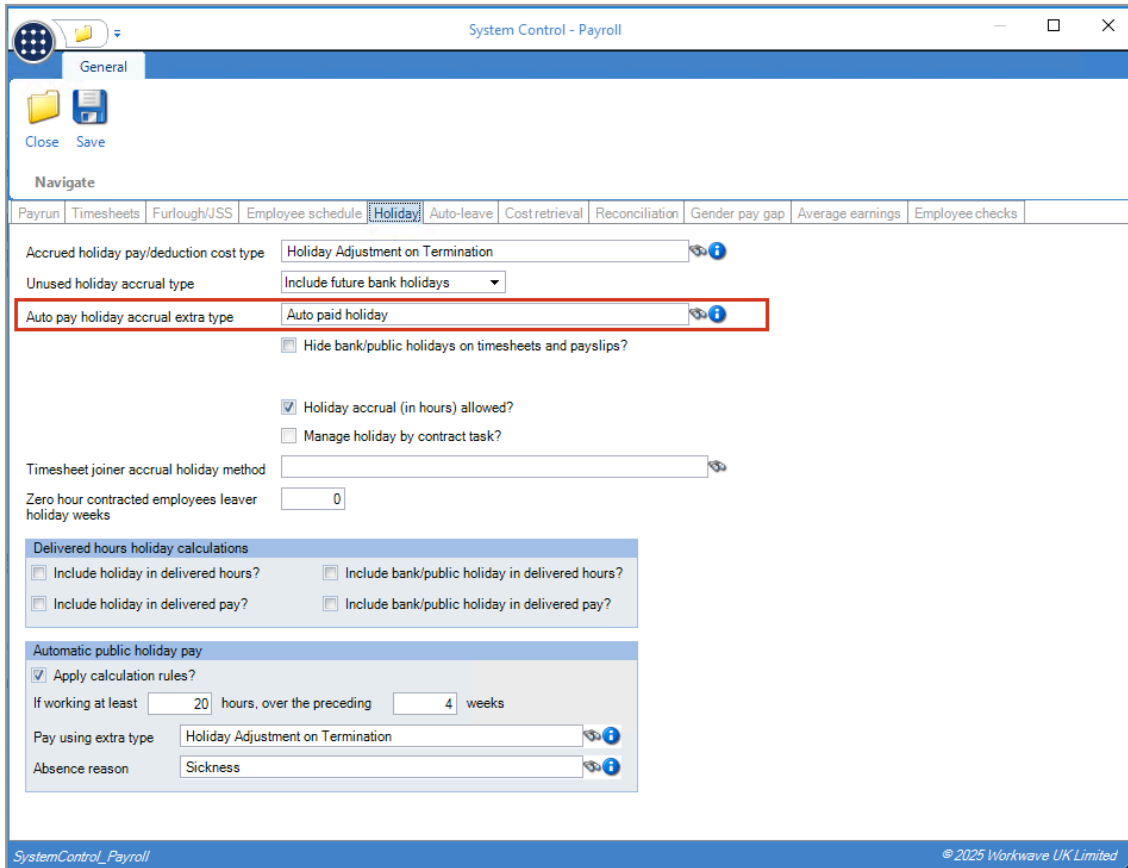
This modification is only applicable to installations using the UK payroll process.

Background

Recent legislative change means that employees working irregular hours can now be paid for the holiday they accrue each pay period, rather than take the holiday. TemplaCMS has been enhanced to allow accrued holiday to be automatically paid.

System Control - Payroll

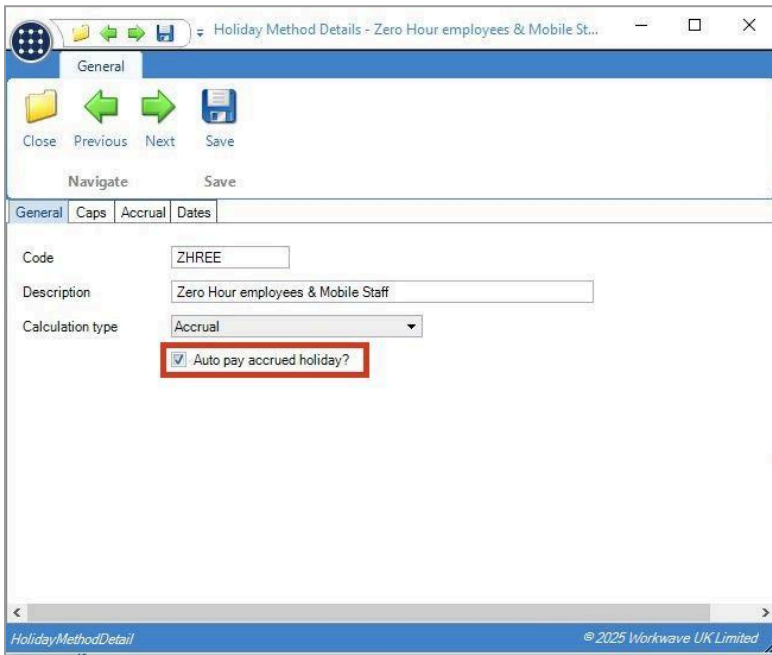
A new option has been added to System Control > Payroll > Holiday:



If this is specified, then the below modifications are enabled.

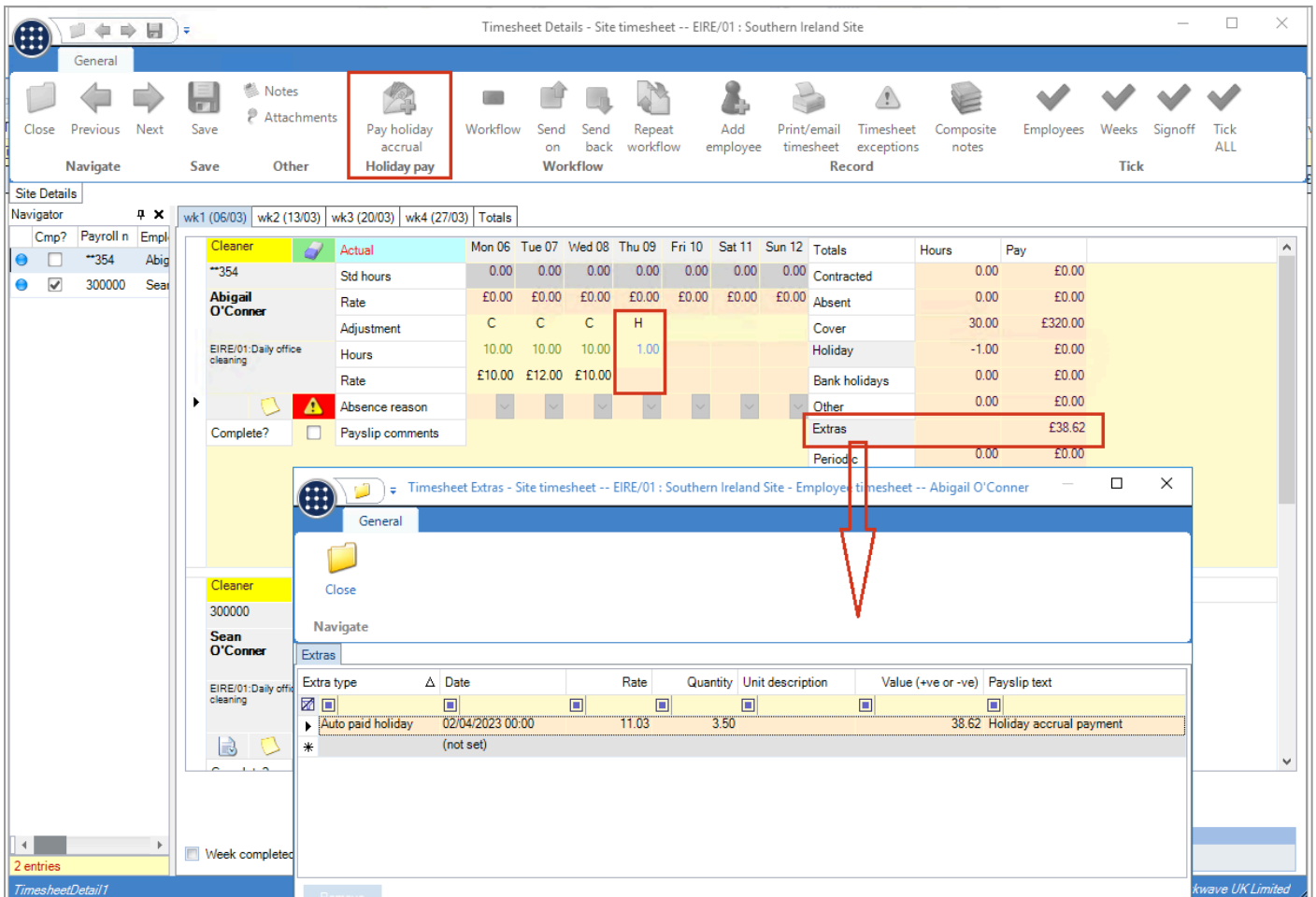
Holiday Method

A checkbox has been added to the definition of accrual holiday methods:



Timesheets

A new **Pay holiday accrual** button has been added to the timesheet toolbar.



This is only visible if any employees on the timesheet are assigned to a holiday method that have the new “Auto pay accrued holiday” option selected.

If the new button is clicked, all relevant employees that qualify for the automatic accrual payment are processed in turn and a single extra is generated for each employee, where this extra is for hours accrued within this pay period, at the average rate of the worked hours that triggered the accrual.

This calculation is also performed automatically when the timesheet is saved.

By clicking the Extras button, the result can be seen, but this extra cannot be amended or removed.

Holiday taken within the timesheet (via the “H” adjustment) for an employee on such a holiday method can still be recorded for reference but are forced to a rate of £0.

Holiday Transactions

At the point the pay batch is posted, holiday transactions are created:

- An entitlement (positive) transaction for the holiday accrued in the period.
- A usage (negative) transaction for the accrued holiday payment.
- A usage (negative) transaction for any H hours recorded.
- A usage (positive) as a reversal of the H hours recorded.

Thus, the sum of the above nets to zero for each pay period.

| St | Employee | Holiday | Contract | Qty | Unit | Task | Dated | Description |
|----|----------|---------|----------|------------|-------|------|--------------|-----------------------|
| | **354 - | 2023 | EIRE/0 | -1.0000000 | Hours | 0 | 09/03/2023 0 | 1.00 hours |
| | **354 - | 2023 | EIRE/0 | 1.0000000 | Hours | 0 | 09/03/2023 0 | reversal 1.00 hours |
| | **354 - | 2023 | EIRE/0 | -3.5000000 | Hours | 0 | 02/04/2023 0 | £38.62 paid as extra |
| | **354 - | 2023 | EIRE/0 | 3.5000000 | Hours | 0 | 02/04/2023 0 | 29 hours at 0.1207000 |
| | | | | 0.0000000 | | | | |

HolidayTransactionList 4 rows © 2025 Workwave UK Limited

EMPLOYEE HOLIDAY TAB ACTIVE/CURRENT YEAR

Background

Previously, the Current option on the Holiday tab on the Employee displayed the most recent open holiday year.

The holiday year end is often run in advance of its end date to open up the next year for requesting holiday via Employee Portal. In this scenario, the current year (based on date) would not be immediately visible when looking at the employee holiday tab.

Employee Details

By default, the Holiday tab now displays cards for the current holiday year (as at today), along with any subsequent open holiday years.

To reflect this new logic, the radio button label has been updated from “Current year” to “Active year(s)”, clarifying that the display includes the present year and any future years that are open.

LOG NUMBERS

This enhancement update contains the following log numbers:

WI4384

WI4465

WI5293

WI5354

WI5355

WI5356

WI5419



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