EmpireSUITE
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What's New in Empire SUITE December 2022?

Contents

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Enhancements in this Release

In addition to bug fixes and ongoing performance improvements, we've added the following new features to the Empire SUITE:

- Make PTO requests from the home page in self-scheduling mode
- Project and Project Portfolio view on the Resource page
- Teams/Portfolios management redesign
- Empire RESOURCE grid view mode
- Redesigned Best Match
- New UI for scheduling recurring assignments
- Multiple resource 'move assignment' capability
- Add/edit Projects from Empire RESOURCE
- Delete multiple selected assignments with a single menu
- Added project information to Empire RESOURCE
- Added the project forecast view to Empire RESOURCE
- PTO Exception Rules

PTO Requests, Reviews and Statements from the User Home Page

Users can now make PTO requests, review any pending approvals and display their PTO statement from the home page when in self-scheduling mode. Click the down arrow to the right of the Add Schedule button to display the PTO request options:
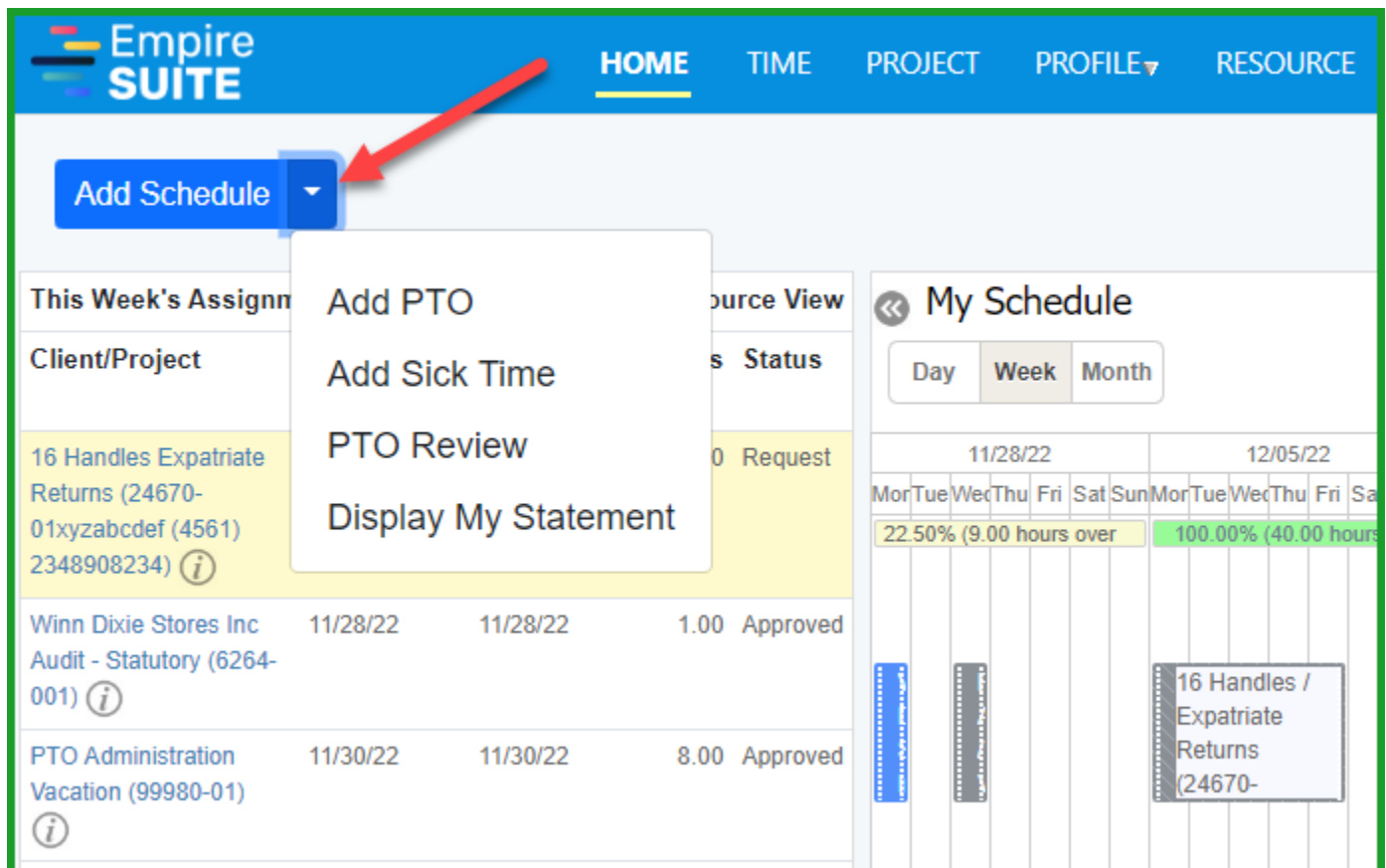
Figure 1 – PTO Requests from My Schedule Page

Project/Project Portfolio View

We've added a project portfolio view and portfolio management capability to the Resource page. Click the Project radio button to change the display to a project-oriented view:
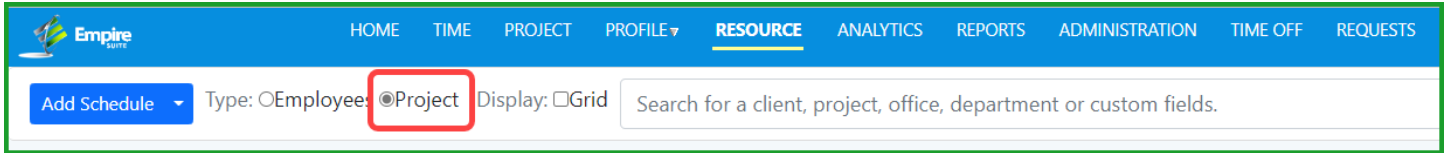

Figure 2 – Resource Page Project View

You can create approved assignments, tentative assignments and requests in Project mode just as in Resource mode. Click the Add Schedule button in the upper left corner, or as in Resource mode, click and drag in the calendar pane to create a new assignment. You can manage existing assignments in Project mode the same as in Resource mode – simply left-click the assignment to display the menu items and edit, delete or reassign as appropriate:
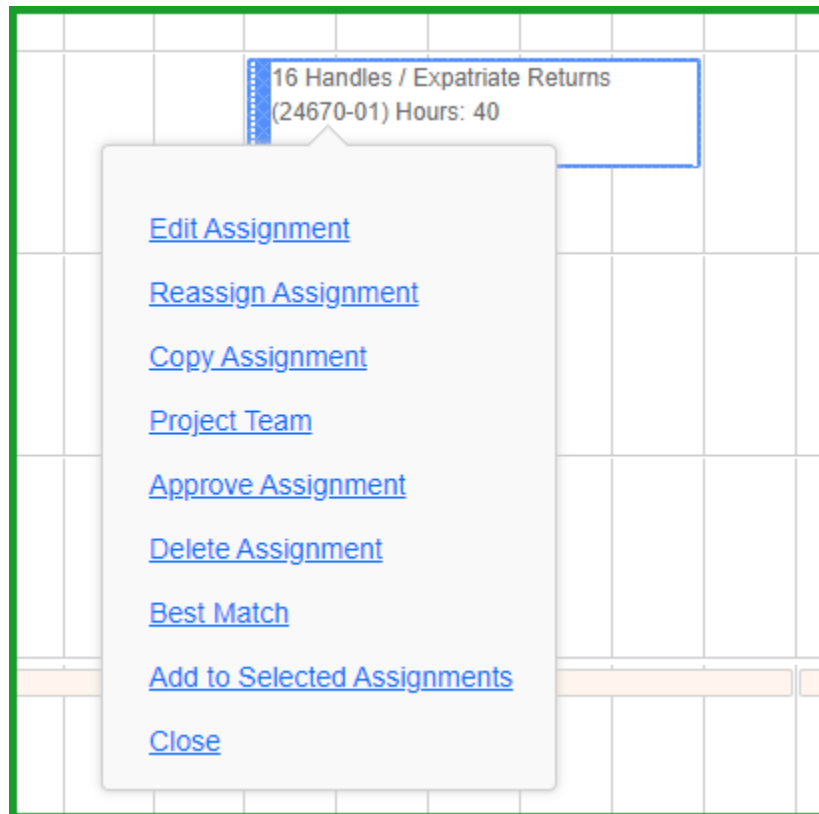
Figure 3 – Project Mode Assignment Menu Options

Add projects, view project and edit project information from the Resource page

Users with the appropriate security permissions can now add new projects and view and edit existing projects without leaving the Resource page. While in Project View mode, click the down arrow to the right of the Add Schedule button:
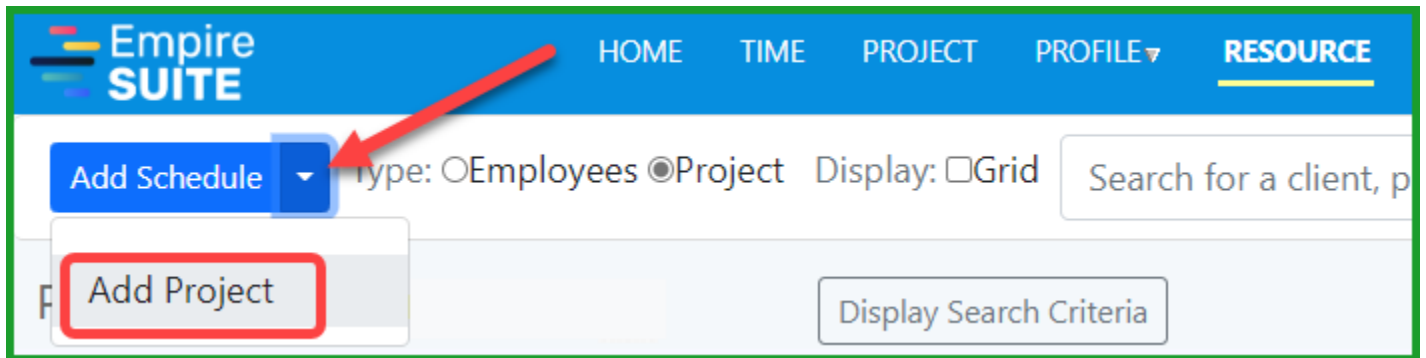

Figure 4 – Adding a Project from the Empire RESOURCE Page

You can also view and edit an existing project from the Resource page while in Project mode by mousing over the project name and clicking the Pencil icon:

Figure 5 – Editing a Project from the Resource Page

Redesigned Teams/Portfolio Management

We've redesigned the UI for creating and managing Teams and Portfolios. To select an existing Team, click the red down arrow:
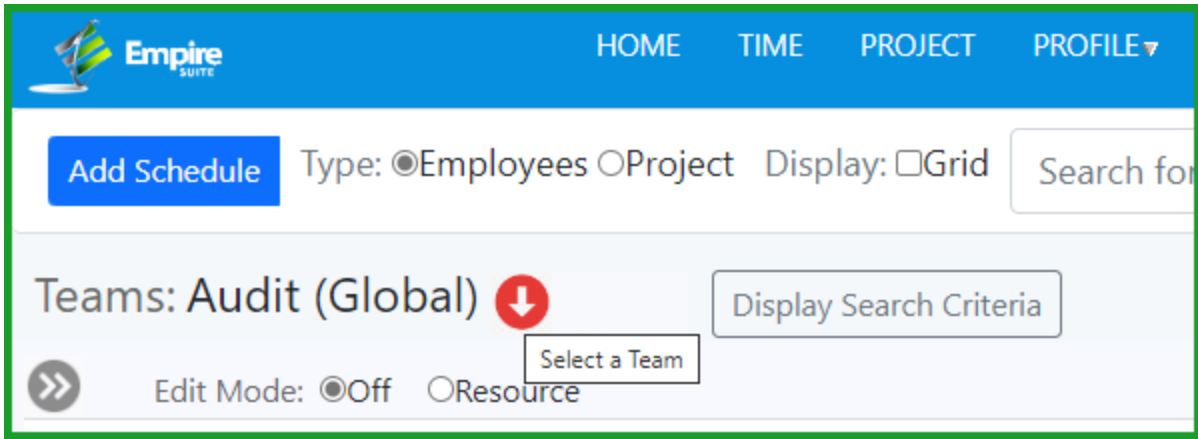
Figure 6 – Selecting a Team

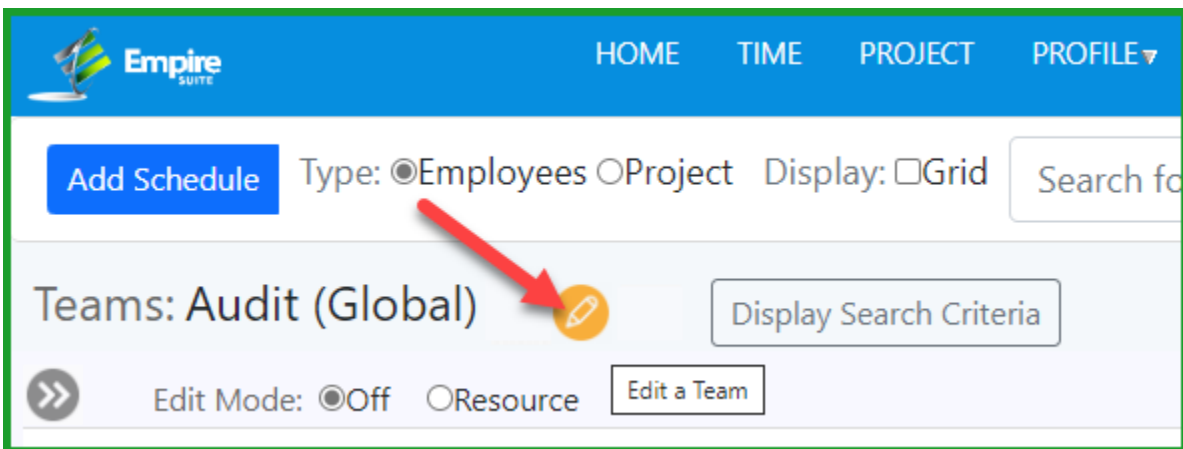To edit an existing team, click the yellow pencil icon:

Figure 7 – Editing a Team

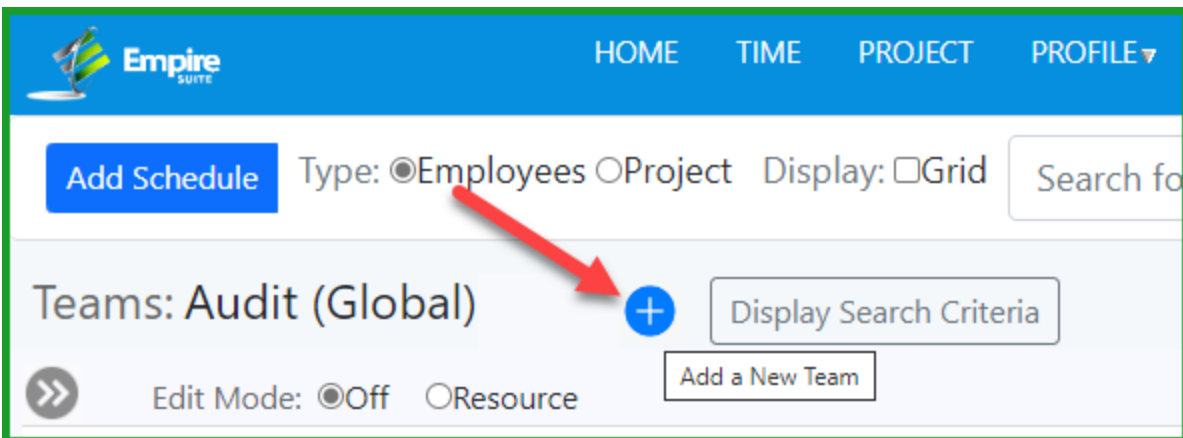To add a new Team, click the blue Plus Sign icon:

Figure 8 – Adding a New Team

Redesigned Best Match

We've updated our Best Match capability by changing the assignment selection from all assignments to allow the user to select which assignments to apply Best Match to. Click the Gear Icon to add a Staff Level assignment to Best Match:
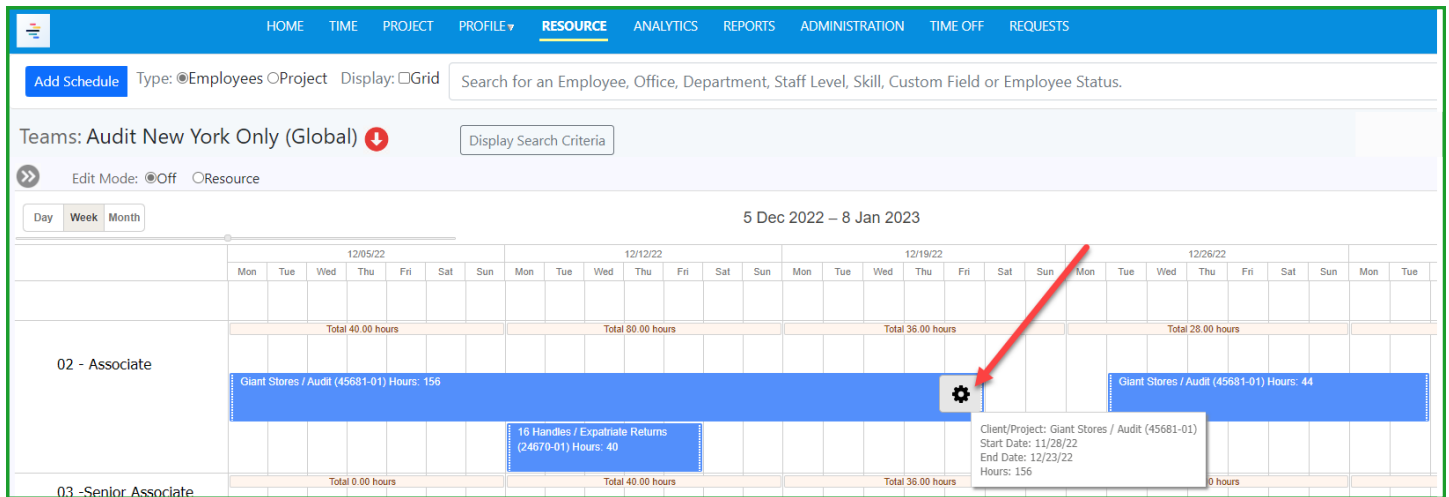
Figure 9 – Adding a Staff Level Assignment to Best Match

The counter in the Select Assignments button will show the total of selected assignments:
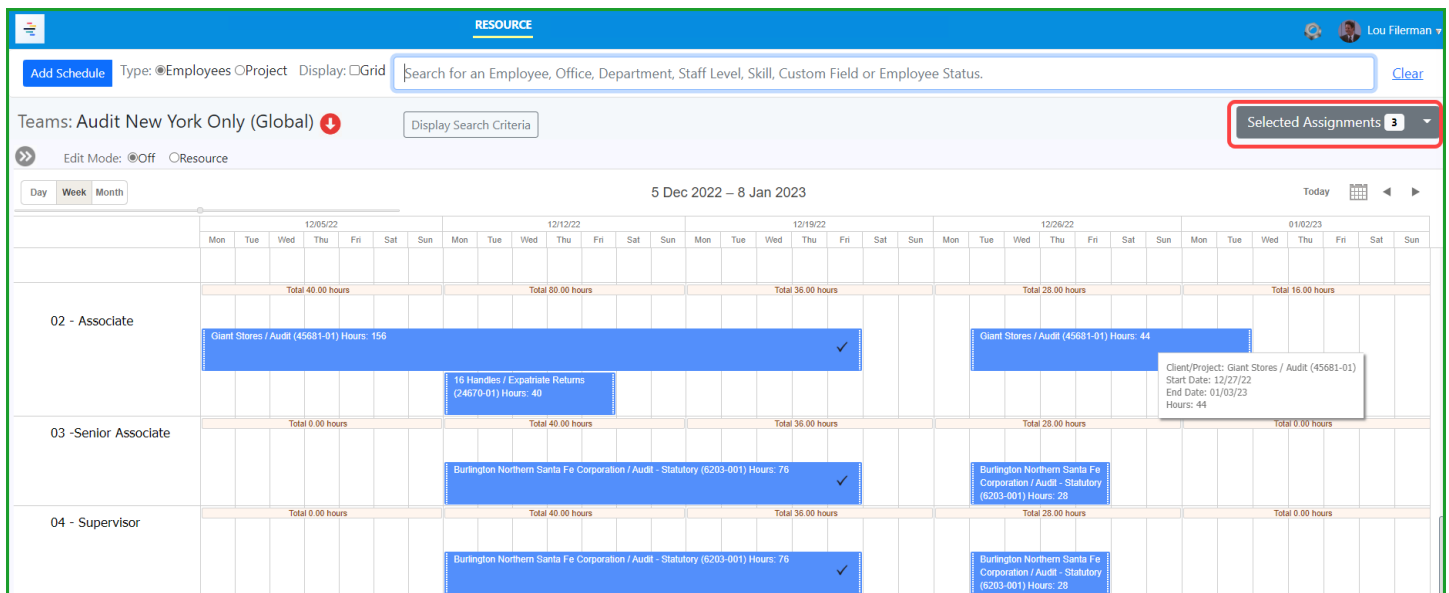
Figure 10 – Selected Staff Level Assignments Counter

Click the Selected Assignments button to get started:
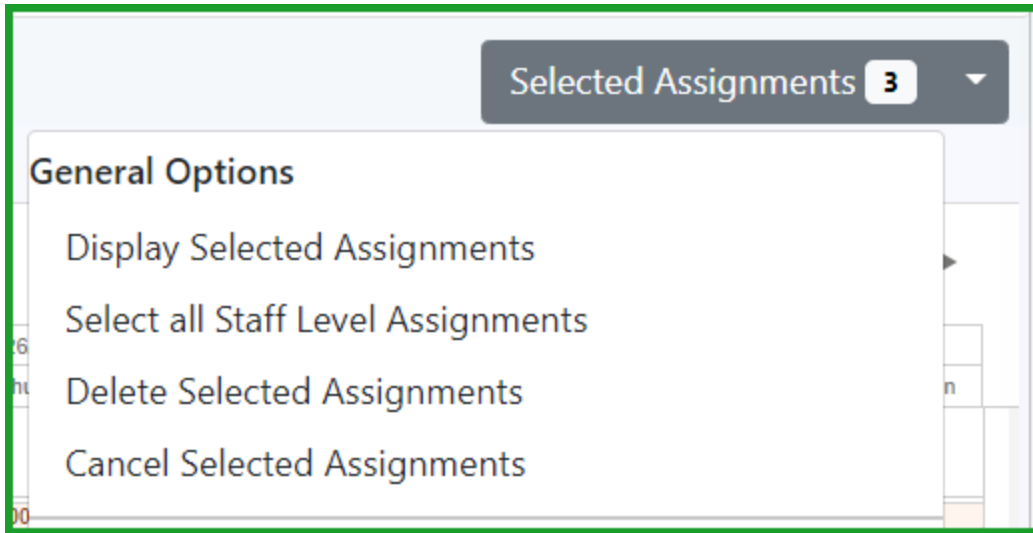
Figure 11 – Selected Assignment General Options

The Display Selected Assignments option will show the currently selected Assignments:

Figure 12 – Display Selected Staff Level Assignments

The Select All Staff Level Assignments option will add any existing Staff Level assignments that haven't been selected into the group. Staff Level Assignments added by the Select All option will have a check mark indicating they have been added to the group:
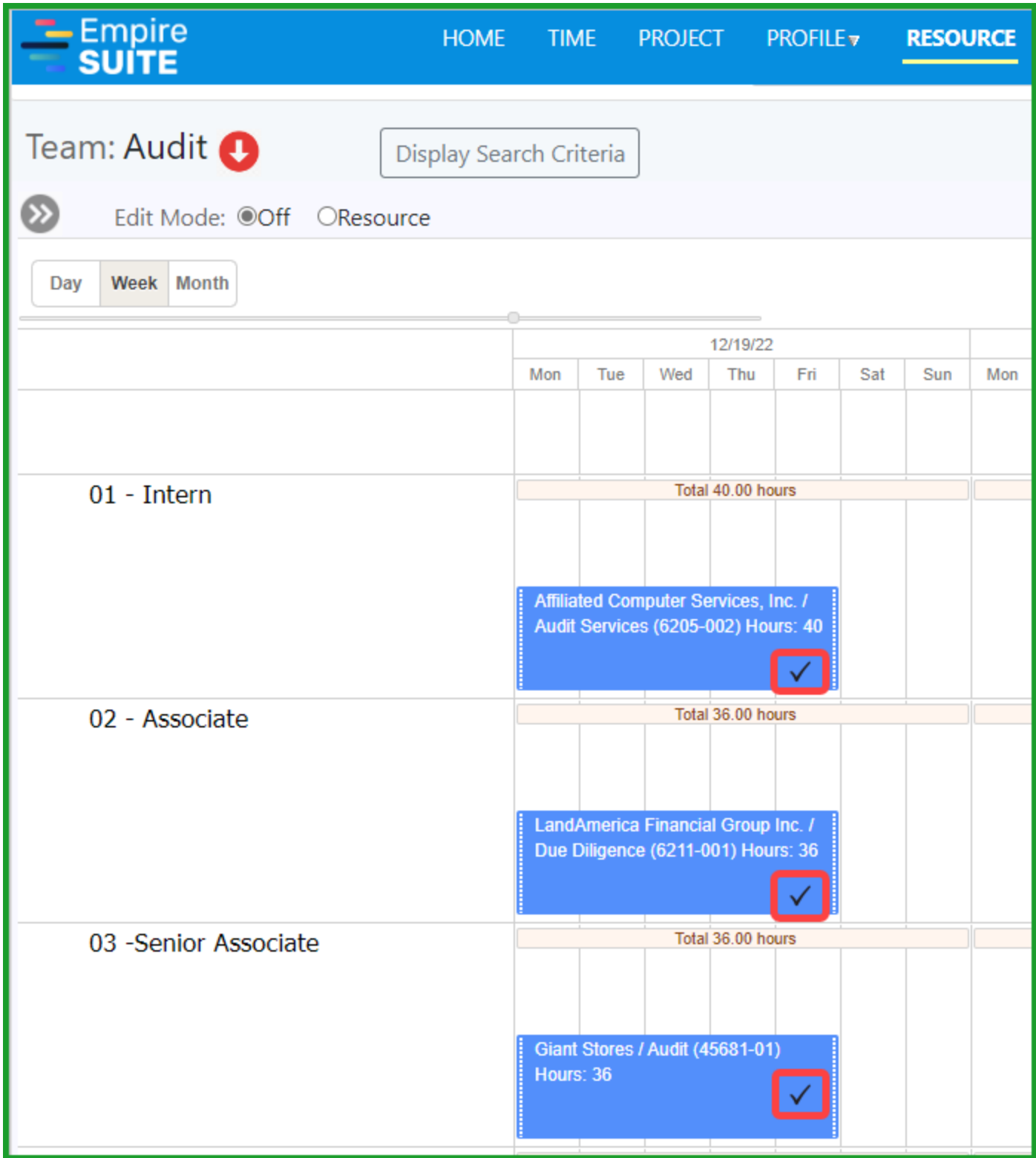
Figure 14 – Selected Staff Level Assignments

We have also enhanced our Skills functionality so it can be included as a requirement for resource assignments as appropriate.

Recurring Assignments

We've added a new UI to support recurring assignments. Recurring assignments can be created in Empire RESOURCE in either employee or project view mode. To create a recurring assignment, create an assignment by either clicking and dragging in the calendar pane or by clicking the Add Schedule button in the upper right corner of the page:
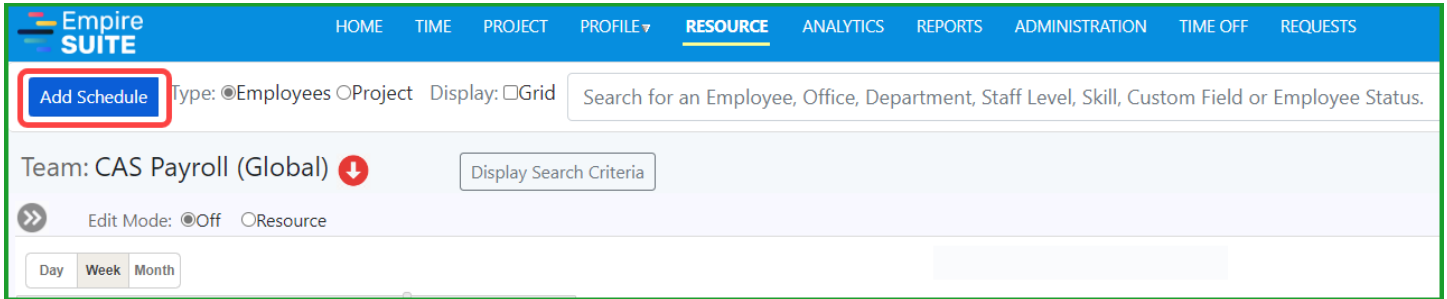
Figure 15 – Empire RESOURCE Add Schedule

In this example, we've created a one day a week payroll processing assignment:

Figure 16 – Weekly Payroll Processing Assignment

Once the assignment is created, click the Gear icon for the assignment, or left-click the assignment and select Add to Selected Assignments:

Figure 17 – Add to Selected Assignments

The Selected Assignments counter has been incremented to include the new selected assignment. Click the down arrow at the right of the Selected Assignments to open the menu:

Figure 18 – Recurring Assignment Options

In this example, we'll set up an assignment for every other Tuesday for eight occurrences:

Figure 19 – Recurring Assignment Setup

And here is the recurring assignment in the calendar:

Figure 20 – Recurring Assignments in the Calendar

You can create recurring assignments using Daily, Weekly, Monthly, Quarterly, Semi-Annual and Annual intervals and occurrences. Be sure to have the Calendars, Summary Periods and Approval Periods configured to allow the desired intervals and occurrences.

Enhanced Move Assignment Capability
You can now select and move assignments for multiple resources instead of one resource at a time. Click the Gear icon to select the assignments you want to move. . .

Figure 21 – Select an Assignment to Move

. . .or click the Gear icon by the project name to select all assignments for a project:

Figure 22 – Select All Assignments for a Project

This will update the Selected Assignments counter. Click the down arrow to the right of the Select Assignments button to open the menu which includes Move Assignment Options:

Figure 23 – Move Assignment Options

In this example, to move all the assignments by 4 weeks, enter 4 in the Move By # of Weeks field and click Save:

Figure 24 – Moving the Selected Assignments

You can move by Days, Weeks, Months, Quarters, Semi-Annually or Annual increments. Please make sure your Calendars, Approval Periods and Summary Periods have been configured to support the desired change. Here you can see the selected assignments have been moved out 4 weeks. You can move assignments back by entering a negative number in the Move By Days or Move By Weeks field.
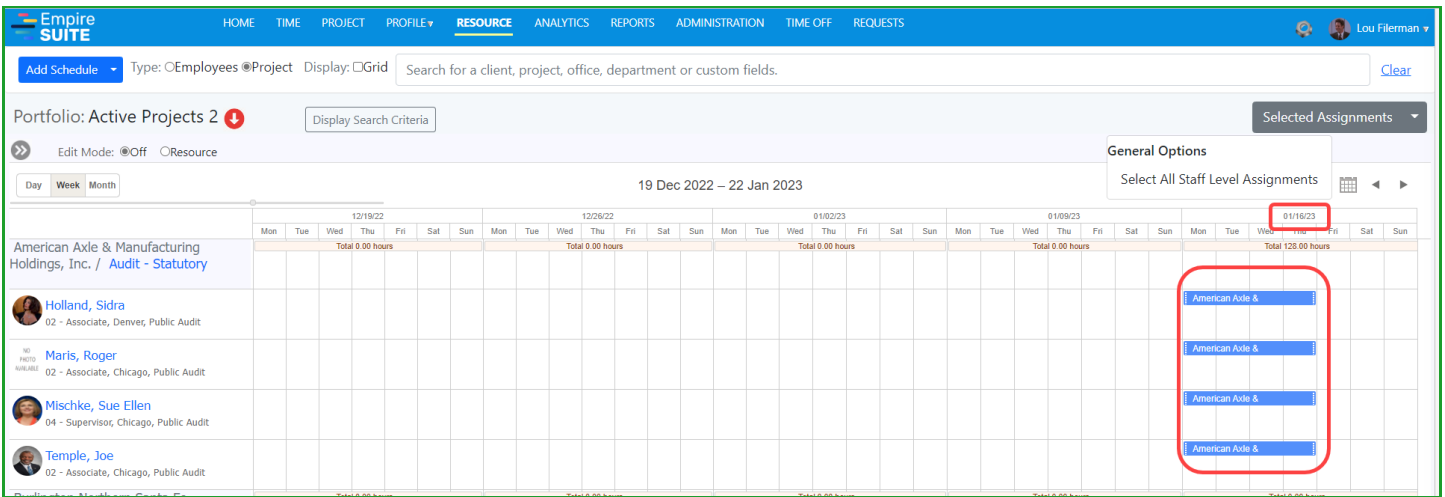
Figure 25 – Selected Assignments After Move By

You can also delete assignment by selecting them into the list or remove all the selected assignments from the list using the Delete Selected Assignments and Cancel Selected Assignments options as seen in Figure n above.

Empire RESOURCE Grid View

We've added a grid view mode to the Resource page. By clicking the Grid checkbox. . .
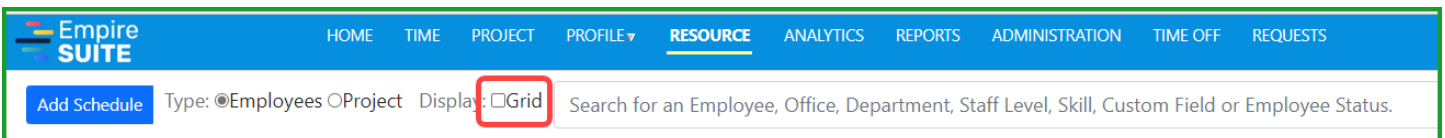

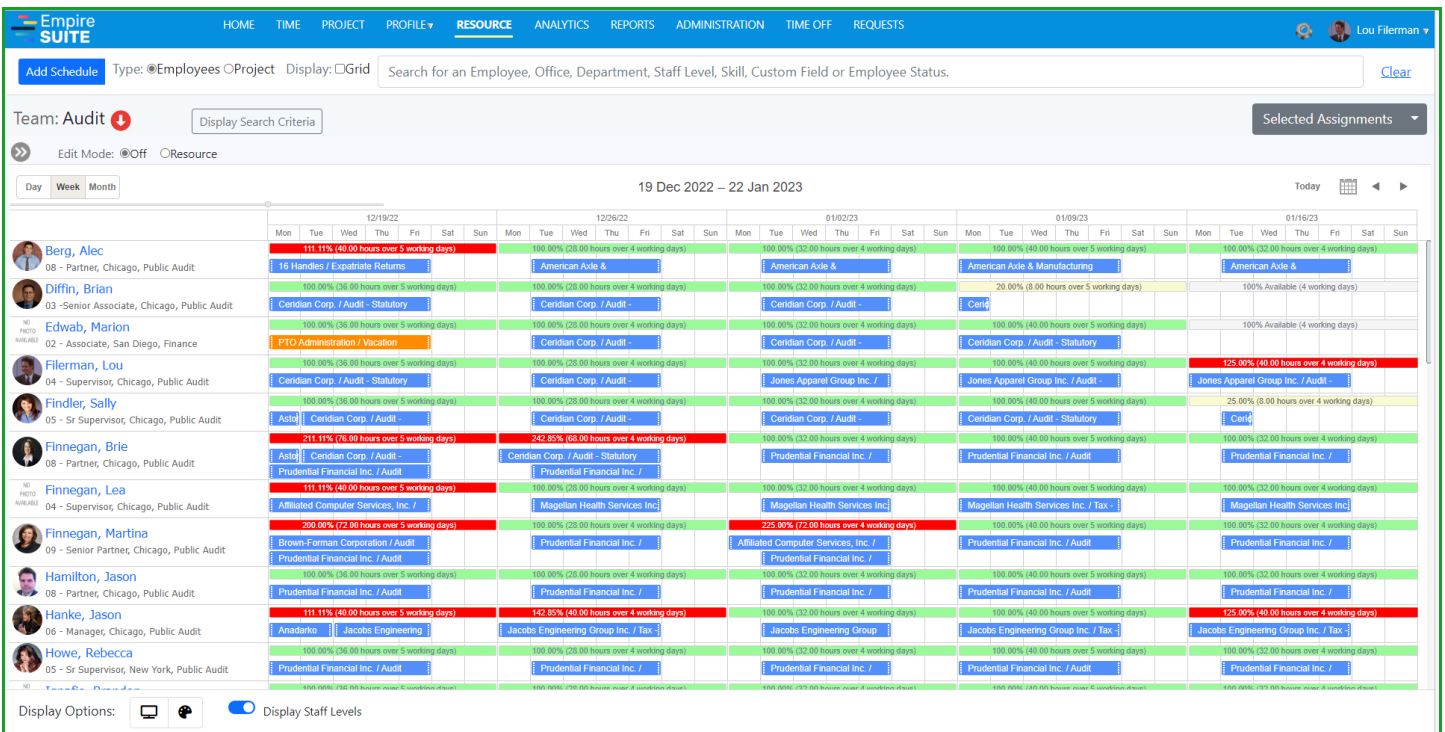Figure 26 – Empire RESOURCE Grid Mode Checkbox

. . .you can change this view. . .

Figure 27 – Empire RESOURCE Calendar View Mode

. . .to this view. Please note the totals at the right-hand edge of the page for the displayed date range:

Figure 28 – Resource Page in Grid Mode

Multiple Assignment Delete

You can now delete multiple assignments instead of deleting assignments one by one. To delete all assignments for a project, click the Gear icon to select the assignments:

Figure 29 – Selecting All Assignments for a Project

Click the down arrow to the right of the Selected Assignments button to open the menu:

Figure 30 – Selected Assignments Menu Control

Select Delete All Assignments to delete the selected assignments:

Figure 31 – Deleting All Selected Assignments

Project Forecast View in Resource Page

You can now see project forecast information in the Resource page. In Project mode, click the Red down arrow to see a list of Portfolios:
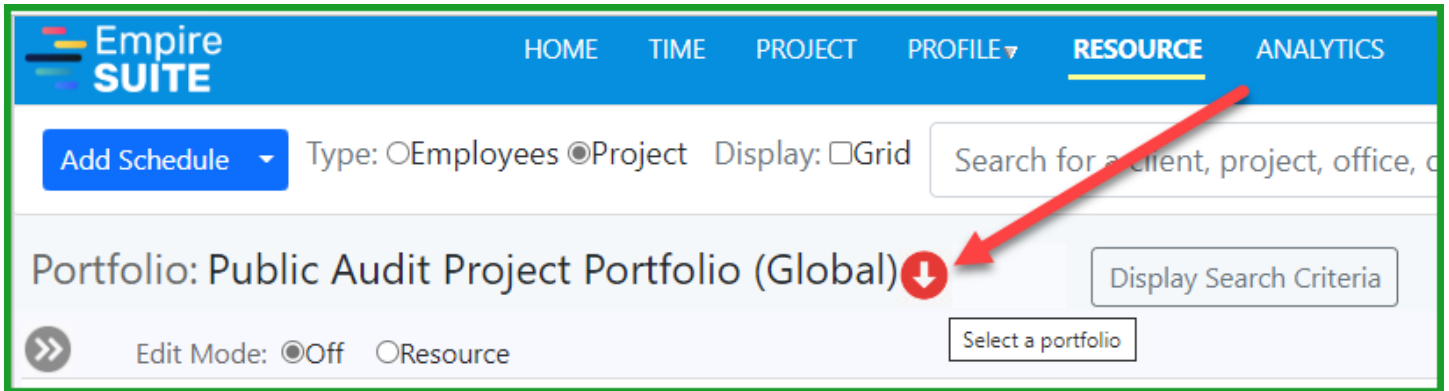

Figure 32 – Select a Portfolio

Click the Eye icon next to a Portfolio to see forecast information for all the projects in the Portfolio

✕

186   Public Audit Project Portfolio (Global)   👁

186 Projects in Portfolio
20,165 Scheduled Hours
1,320 Budgeted Hours

oject   Display: ☐ Grid   Search for a client, p

rtfolio (Global) ⬇

168   Active Projects 2 (Global)   👁

168 Projects in Portfolio
28,634 Scheduled Hours
1,120 Budgeted Hours

12/19/22

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon

Total 116.00 hours

1   CVS Client Portfolio (Global)   👁

1 Projects in Portfolio
0 Scheduled Hours
1,000 Budgeted Hours

16 Handles / Expatriate Returns

16 Handles / Expatriate Returns
16 Handles / Expatriate Returns

Total 80.00 hours

168   Active Projects (Global)   👁

168 Projects in Portfolio
28,634 Scheduled Hours
1,120 Budgeted Hours

Affiliated Computer Services, Inc. /

1   New York Projects (Global)   👁

1 Projects in Portfolio
0 Scheduled Hours
1,000 Budgeted Hours

Affiliated Computer Services, Inc. /

Custom Search   **All Portfolios**

Figure33 – Portfolio List

The forecast information includes actual hours recorded, remaining scheduled hours, estimated hours at completion, the estimated hours from the project setup page, and the variance between the Estimated hours at completion and the estimated hours:
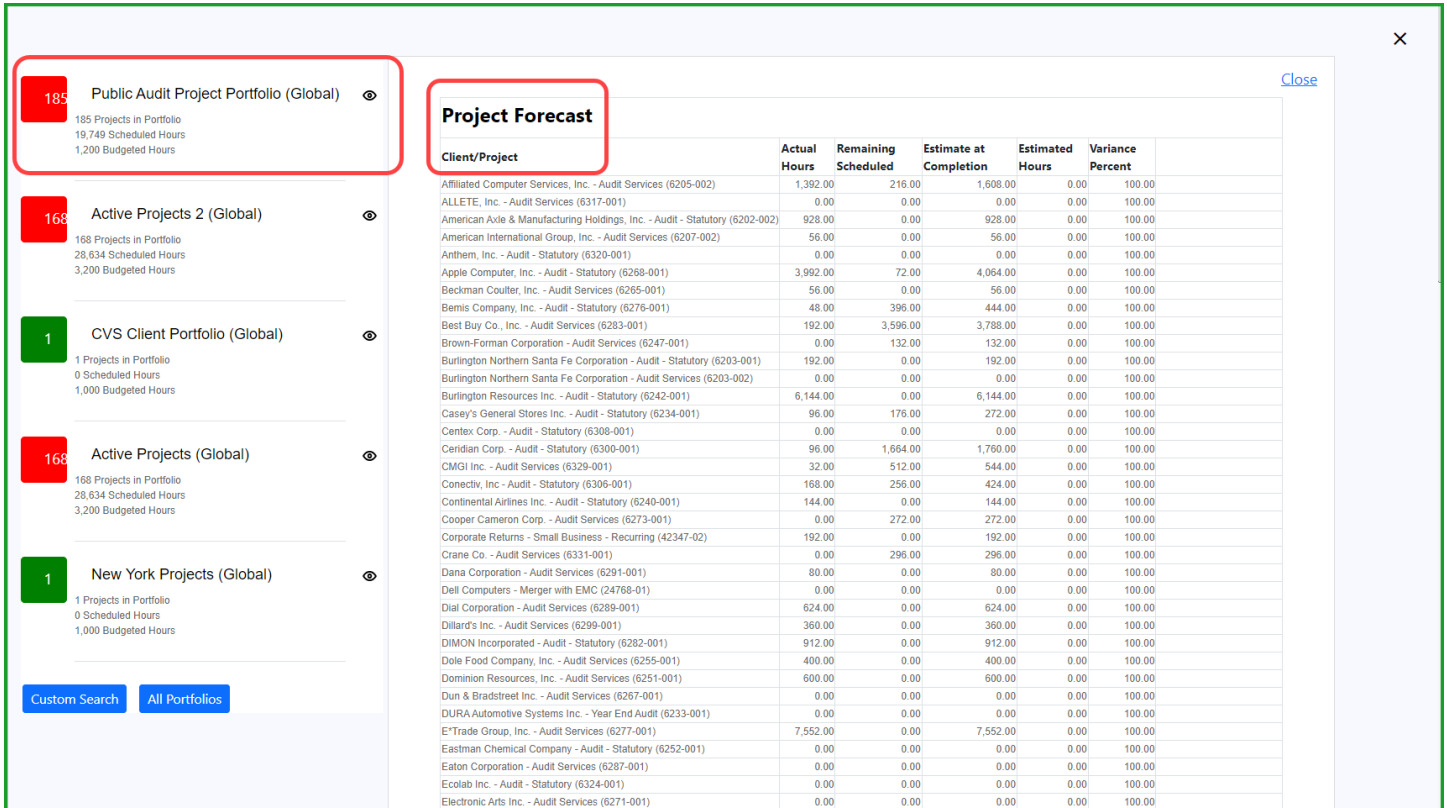

Figure 34 – Project Estimate Information

PTO Exception Rules

We've added a new feature allowing administrators to define PTO request 'Exception' rules. These options can be used to require an additional approval when the set limits are exceeded. From the Time Off menu, select Administration \ PTO Policies. Then click the PTO Exception Rules radio button:

Figure 35 – PTO Exception Rules Setup

These settings allow you require an extra approval if the amount requested exceeds the defined limits for the total request amount, in a week, in a month, in a calendar, year or across a defined date range. You can also set a limit requiring an additional approval if the request amounts exceed a percentage of the standard hours for the requested period.