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What's New in Empire SUITE December 2022?

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What's New in Empire SUITE December 2022?

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:

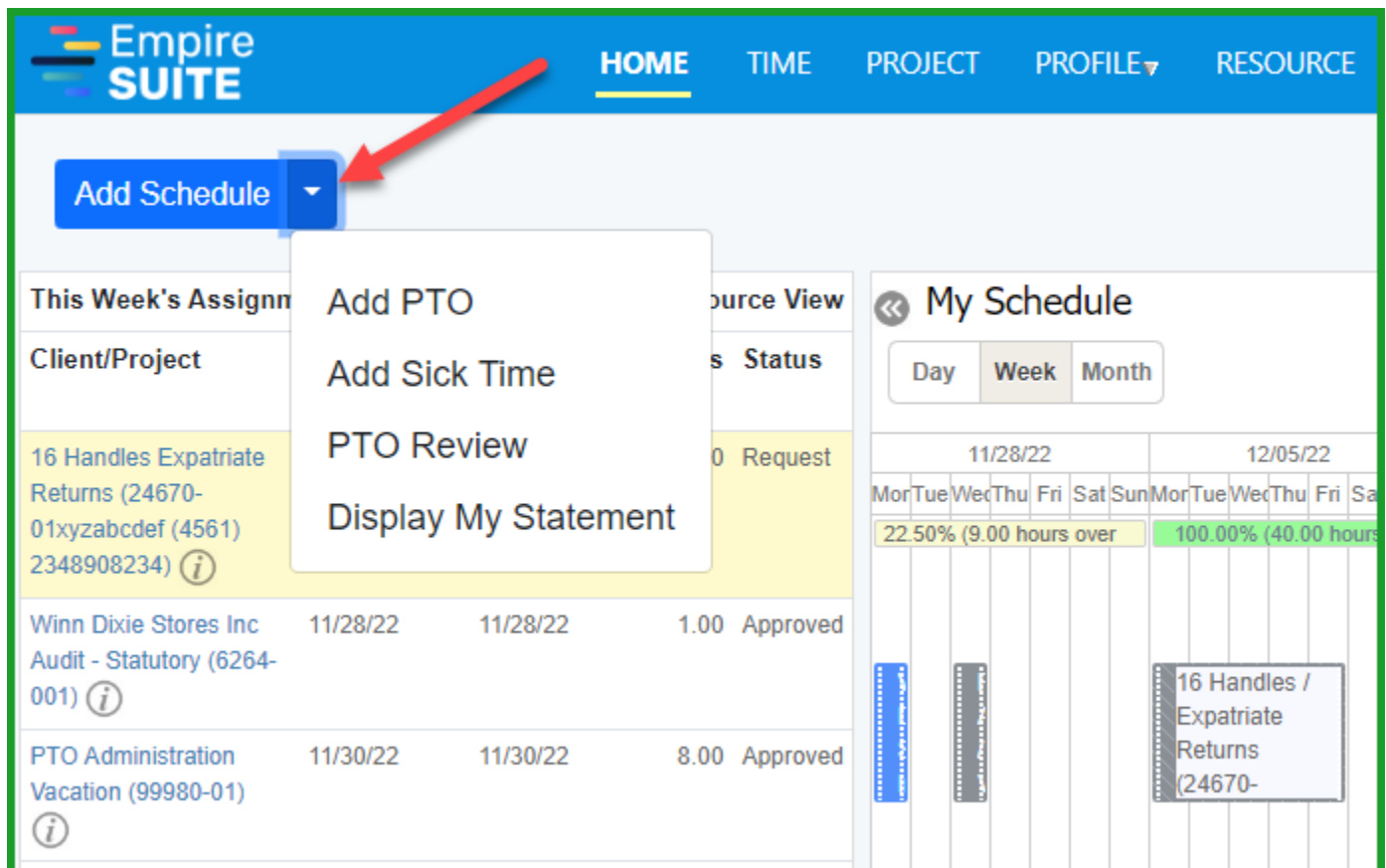


Figure 1 – PTO Requests from My Schedule Page

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:

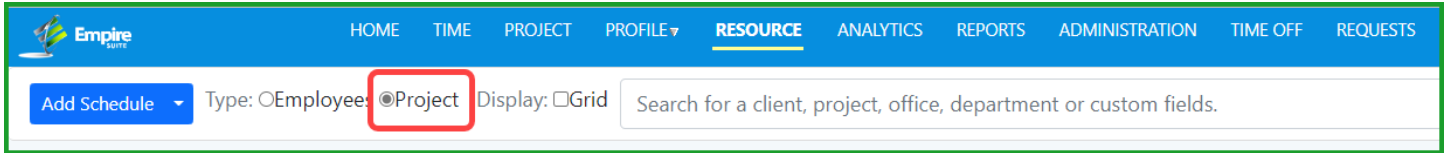


Figure 2 – Resource Page Project View

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:

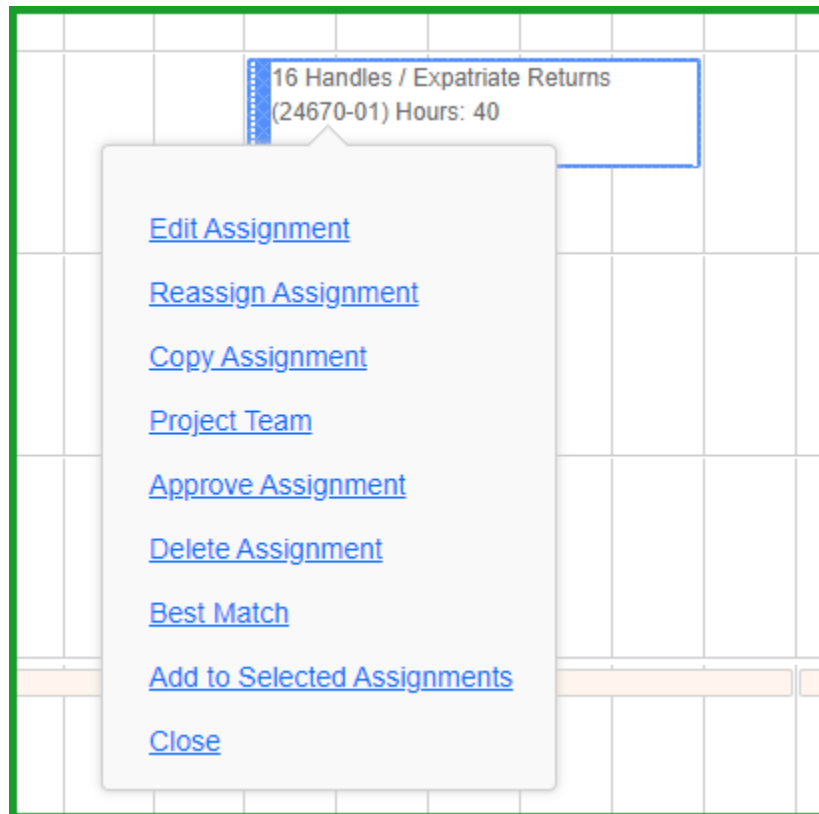


Figure 3 – Project Mode Assignment Menu Options

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:

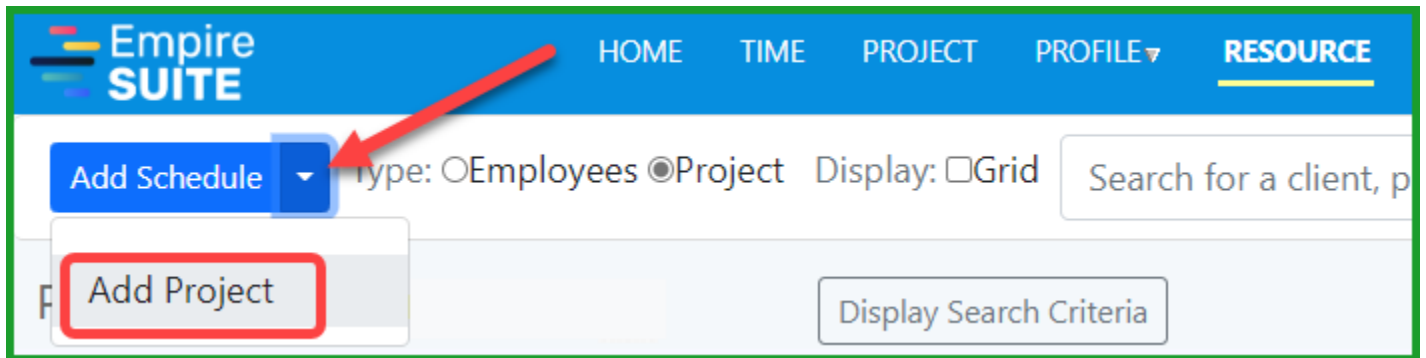


Figure 4 – Adding a Project from the Empire RESOURCE Page

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:

The screenshot shows the 'RESOURCE' page in the Empire Suite application. At the top, there is a navigation bar with 'HOME', 'TIME', 'PROJECT', 'PROFILE', and 'RESOURCE' (highlighted). Below the navigation bar, there are filters for 'Add Schedule', 'Type: Employees Project', and 'Display: Grid'. A search bar is also present. The main content area shows a project named 'projects 2' with a red down arrow icon. Below this, there are tabs for 'Day', 'Week', and 'Month'. The main view is a calendar grid for the date 12/19/22, with columns for Mon, Tue, Wed, Thu, Fri, Sat, Sun, and Mon. A project entry for 'American Axle & Manufacturing Holdings, Inc. / Audit - Statutory' is visible, with a total of 0.00 hours. Below the project entry, there is a list of resources: Holland, Sidra; Maris, Roger; Mischke, Sue Ellen; and Temple, Joe. A red arrow points to the edit icon (a pencil) next to the project name, which is highlighted with a box labeled 'Edit project'.

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:

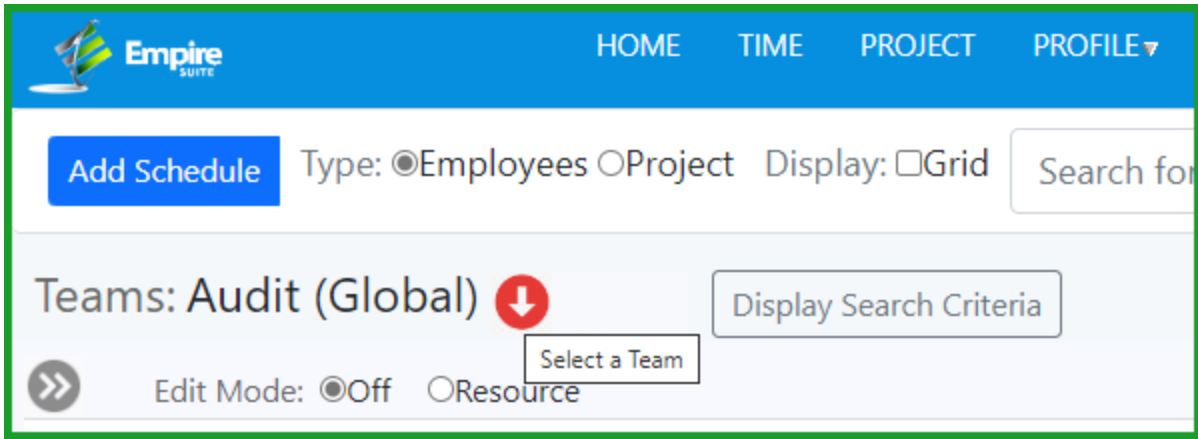


Figure 6 – Selecting a Team

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

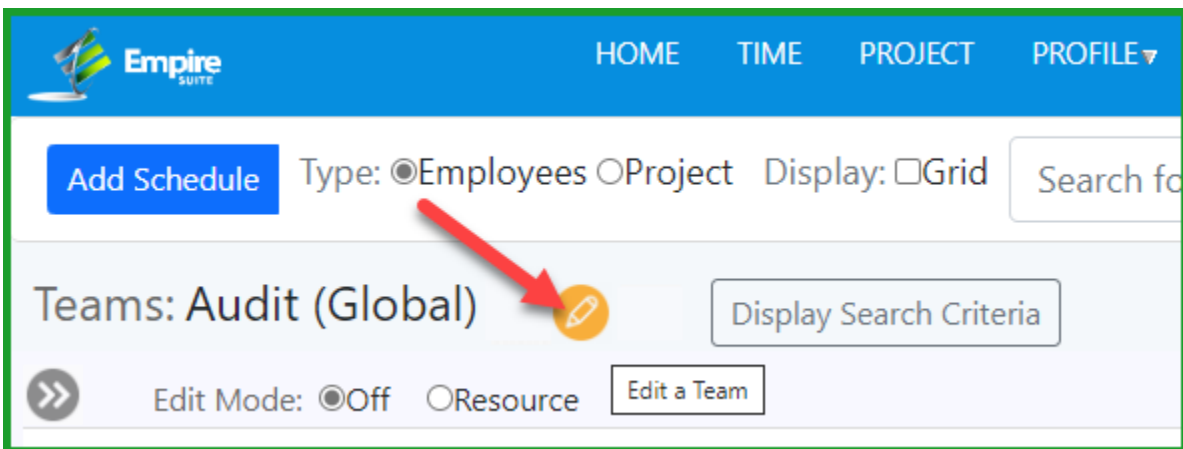


Figure 7 – Editing a Team

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

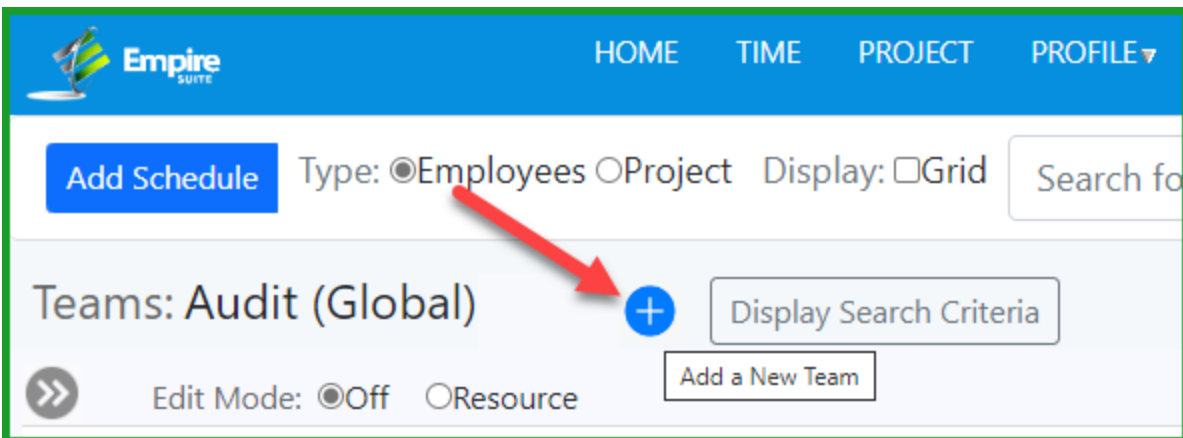


Figure 8 – Adding a New Team

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:

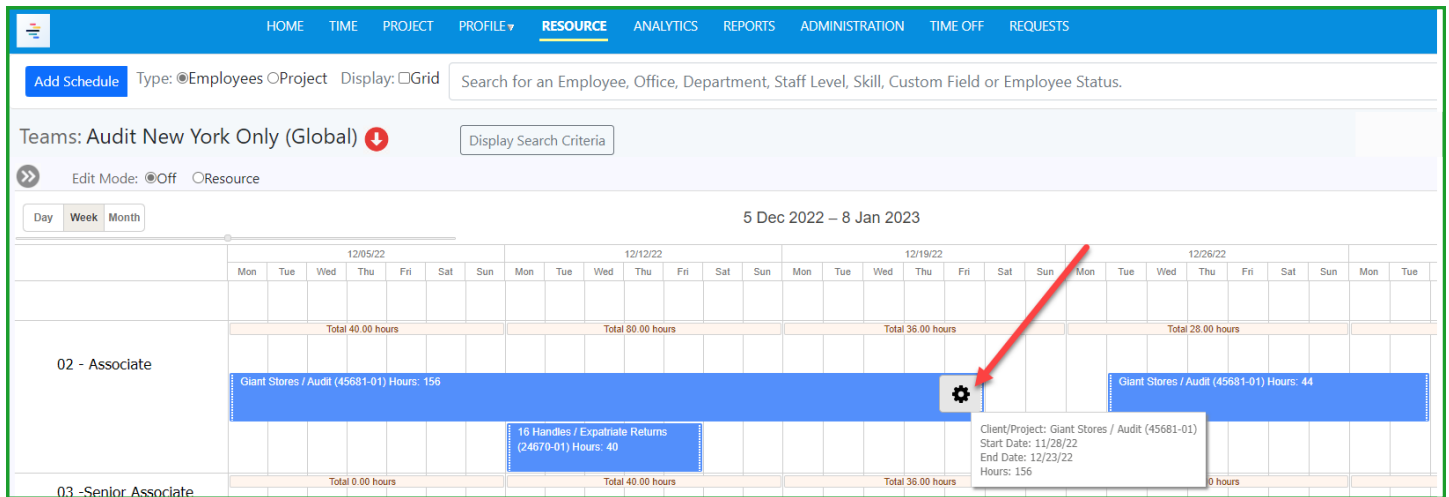


Figure 9 – Adding a Staff Level Assignment to Best Match

The counter in the Select Assignments button will show the total of selected assignments:

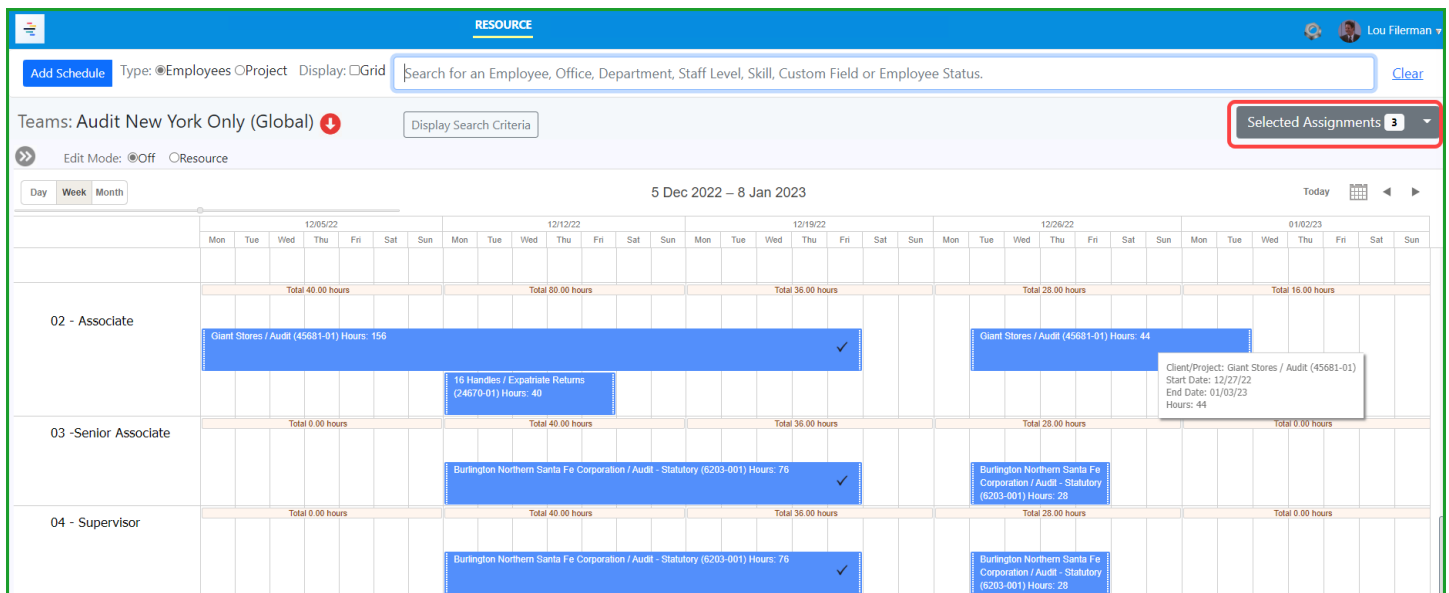


Figure 10 – Selected Staff Level Assignments Counter

Click the Selected Assignments button to get started:

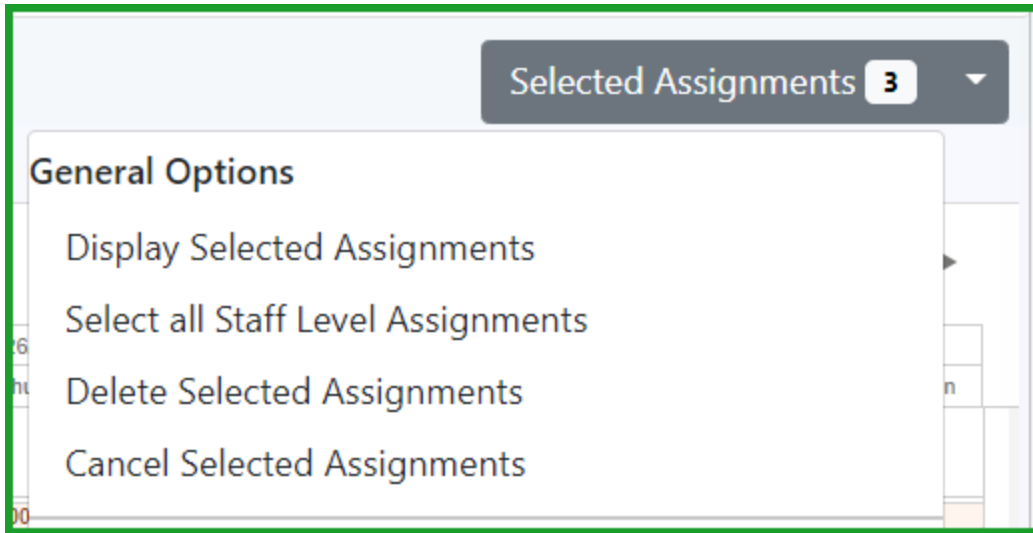


Figure 11 – Selected Assignment General Options

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

Selected Assignments x				
Start Best Match and Save Cancel Selected Assignments				
Remove	Employee/Staff Level	Client/Project	Scheduled Dates	Scheduled Hours
Remove	03 -Senior Associate	Burlington Northern Santa Fe Corporation / Audit - Statutory (6203-001)	12/12/22 - 01/01/23	104.00
Remove	04 - Supervisor	Burlington Northern Santa Fe Corporation / Audit - Statutory (6203-001)	12/12/22 - 01/01/23	104.00
Remove	02 - Associate	Giant Stores / Audit (45681-01)	09/02/22 - 01/03/23	664.00

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:

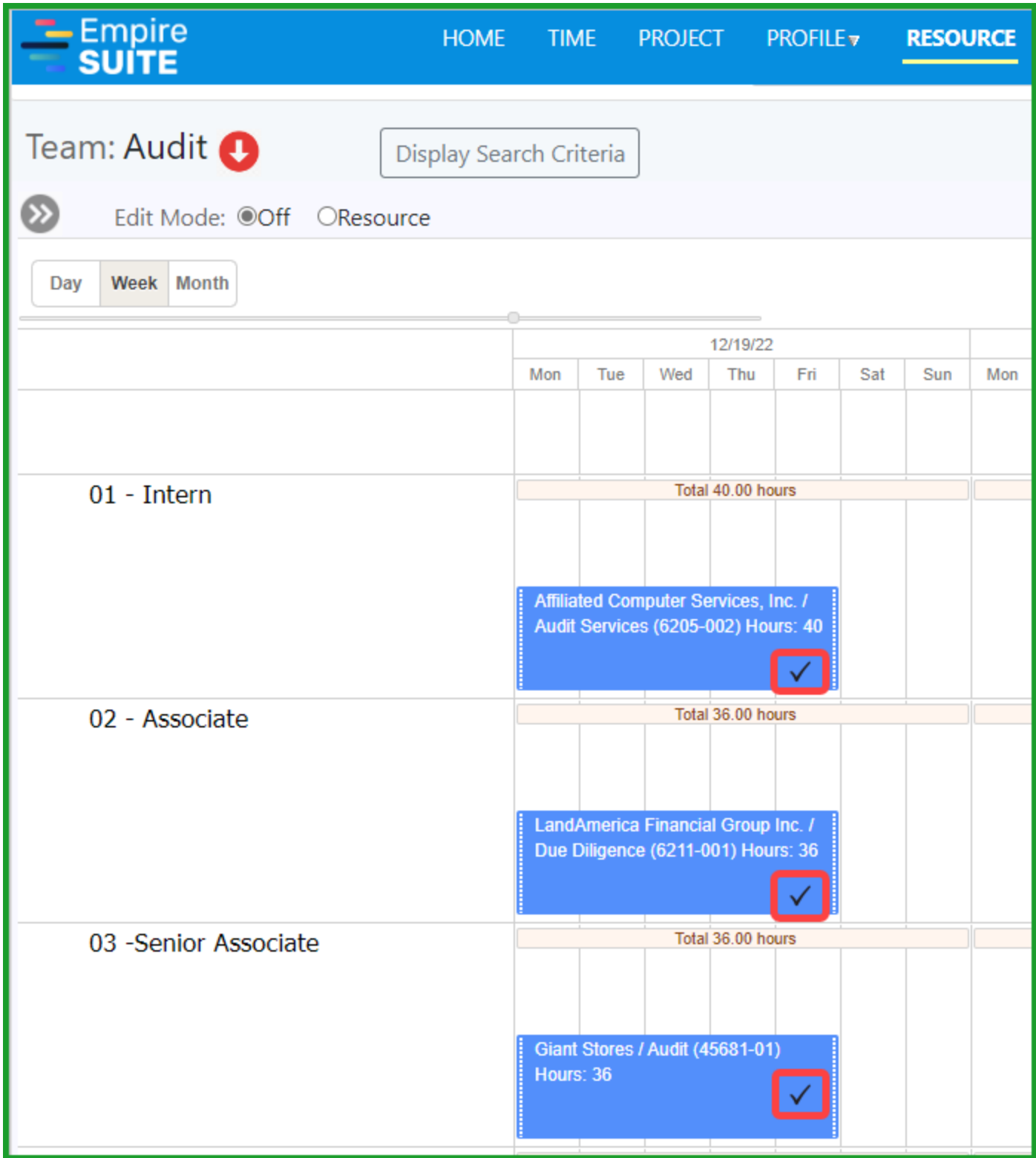


Figure 14 – Selected Staff Level Assignments

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:

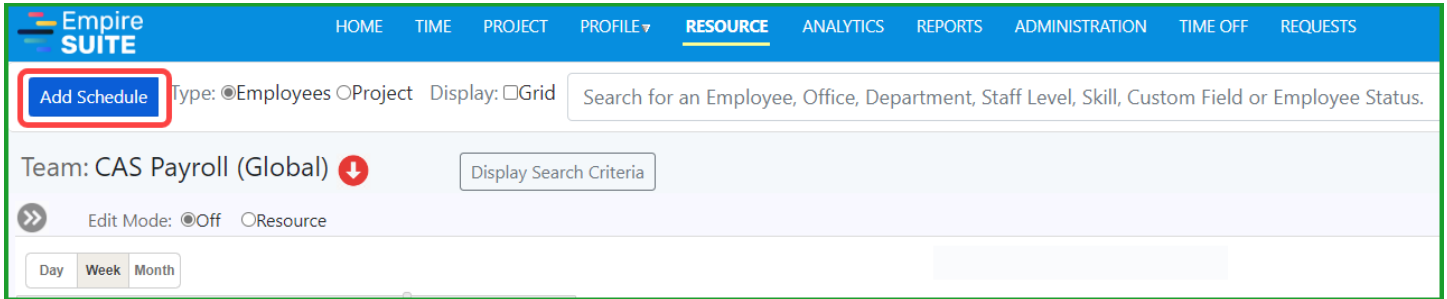


Figure 15 – Empire RESOURCE Add Schedule

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

<< Edit Assignment Save Delete X

START DATE: 12/20/2022 📅 END DATE: 12/20/2022 📅

EMPLOYEE Ipswich, Roger X Requirements

Ipswich, Roger

CLIENT / PROJECT: Maxwell Babinsky & Clark CPAs - It's A Grind - recurring payroll (247485)

TASK LIST / TASK: Bookkeeping - Payroll Processing ()

LOCATION: Client Location

STATUS: Approved Tentative Request ALLOCATION: Hours Full Time 100 Available Time

EMPLOYEE COMMENT: Employee Manager Request

Enter an employee comment.

SCHEDULE DETAILS

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
12/18/22			8.00					8.00

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:

The screenshot displays the Empire Suite interface for resource management. At the top, there are navigation tabs: HOME, TIME, PROJECT, PROFILE, RESOURCE (selected), ANALYTICS, REPORTS, and ADMINISTRATION. Below the navigation is a search bar and a filter section for 'Type' (Employees selected) and 'Display' (Grid selected). The main area shows a calendar for the team 'CAS Payroll (Global)' from 19 Dec 2022 to 22 Jan 2023. A list of employees is on the left, and a calendar grid shows their assignments. A context menu is open over the calendar, with the 'Add to Selected Assignments' option highlighted in red. The menu options are: Edit Assignment, Reassign Assignment, Copy Assignment, Project Team, Delete Assignment, Best Match, Add to Selected Assignments (highlighted), and Close.

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:

The screenshot shows the 'Recurring Assignment Options' dialog box. At the top, there are radio buttons for frequency: 0 Days, Weekly, Monthly (selected), Quarterly, Semi Annual, and Annual. Below this, there are two rows of input fields for 'User Defined' assignments. Each row has an input field for 'Interval - Days' or 'Interval - Weeks', an input field for 'Occurrences', and a 'Save' button.

Figure 18 – Recurring Assignment Options

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

Recurring Assignment Options

0 Days Weekly Monthly Quarterly Semi Annual Annual

User Defined [] [] Save

User Defined 2 8 Save

Figure 19 – Recurring Assignment Setup

And here is the recurring assignment in the calendar:

Empire SUITE

HOME TIME PROJECT PROFILE RESOURCE ANALYTICS REPORTS ADMINISTRATION TIME OFF REQUESTS

Add Schedule Type: @Employees @Project Display: □Grid Search for an Employee, Office, Department, Staff Level, Skill, Custom Field or Employee Status. Clear

Team: CAS Payroll (Global) Display Search Criteria Selected Assignments

General Options Select All Staff Level Assignments

19 Dec 2022 – 22 Jan 2023


Resource	12/19/22	12/20/22	12/21/22	12/22/22	12/23/22	12/24/22	12/25/22	12/26/22	12/27/22	12/28/22	12/29/22	12/30/22	12/31/22	01/01/23	01/02/23	01/03/23	01/04/23	01/05/23	01/06/23	01/07/23	01/08/23	01/09/23	01/10/23	01/11/23	01/12/23	01/13/23	01/14/23	01/15/23	01/16/23			
Abbott, Mickey	66.66% (24.00 hours over 5 working days)															100% Available (4 working days)																175.00% (40.00 hours over 4 working days)
Asquith, Gerri																100% Available (4 working days)																
Chang, Andy																100.00% (36.00 hours over 5 working days)																
Hanke, Jason																111.11% (40.00 hours over 5 working days)																
Ipswich, Roger																72.22% (26.00 hours over 5 working days)																
Mischke, Sue Ellen																100% Available (5 working days)																
Sacamano, Bob																100% Available (5 working days)																

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. . .



[HOME](#)
[TIME](#)
[PROJECT](#)
[PROFILE ▾](#)
[RESOURCE](#)

Add Schedule ▾
 Type: Employees Project
 Display: Grid

Portfolio: Active Projects 2 
Display Search Criteria

»»
 Edit Mode: Off Resource

Day Week Month





	12/19/22							Mon
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
American Axle & Manufacturing Holdings, Inc. / Audit - Statutory	Total 128.00 hours							
 Holland, Sidra 02 - Associate, Denver, Public Audit	American Axle &							
<small>NO PHOTO AVAILABLE</small> Maris, Roger 02 - Associate, Chicago, Public Audit	American Axle &							
 Mischke, Sue Ellen  04 - Supervisor, Chicago, Public Audit	American Axle &							
 Temple, Joe 02 - Associate, Chicago, Public Audit	American Axle &							
Burlington Northern Santa Fe Corporation / Audit - Statutory	Total 0.00 hours							

Figure 21 – Select an Assignment to Move

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

The screenshot shows the 'Empire SUITE' interface. At the top, there are navigation tabs: HOME, TIME, PROJECT, PROFILE, and RESOURCE. Below the navigation, there are filters for 'Add Schedule', 'Type: Employees Project', and 'Display: Grid'. A search bar is present for finding clients or projects.

The main section is titled 'Portfolio: Active Projects 2'. Below this, there are options for 'Edit Mode: Off Resource' and view toggles for 'Day', 'Week', and 'Month'. A calendar grid is displayed for the date 12/19/22, with columns for Mon, Tue, Wed, Thu, Fri, Sat, Sun, and Mon.

The project 'American Axle & Manufacturing Holdings, Inc. / Audit - Statutory' is selected, showing a total of 128.00 hours. A red box highlights a gear icon with a tooltip that says 'Click to automate all assignments'. Below the project name, there is a list of resources assigned to the project:

- Holland, Sidra**: 02 - Associate, Denver, Public Audit
- Maris, Roger**: NO PHOTO AVAILABLE, 02 - Associate, Chicago, Public Audit
- Mischke, Sue Ellen**: 04 - Supervisor, Chicago, Public Audit
- Temple, Joe**: 02 - Associate, Chicago, Public Audit

Each resource has a blue bar indicating their assignment to the project, with a dropdown arrow on the right side of the bar.

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:

Lou Filerman ▾

[Clear](#)

Selected Assignments **4** ▾

General Options

- Display Selected Assignments
- Select All Staff Level Assignments
- Delete Selected Assignments
- Cancel Selected Assignments

Recurring Assignment Options

0 Days
 Weekly
 Monthly
 Quarterly
 Semi Annual
 Annual

User Defined	# of Days	1 Occurrence	Save
User Defined	# of Weeks	1 Occurrence	Save

Move Assignment Options

Week
 Month
 Quarter
 Semi Annual
 Annual

Move By	# of Days	Save
Move By	# of Weeks	Save

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:

Selected Assignments 4

General Options

- Display Selected Assignments
- Select All Staff Level Assignments
- Delete Selected Assignments
- Cancel Selected Assignments

Recurring Assignment Options

0 Days
Weekly
Monthly
Quarterly
Semi Annual
Annual

User Defined	# of Days	1 Occurrence	Save
User Defined	# of Weeks	1 Occurrence	Save

Move Assignment Options

Week
Month
Quarter
Semi Annual
Annual

Move By	# of Days		Save
Move By	4		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.

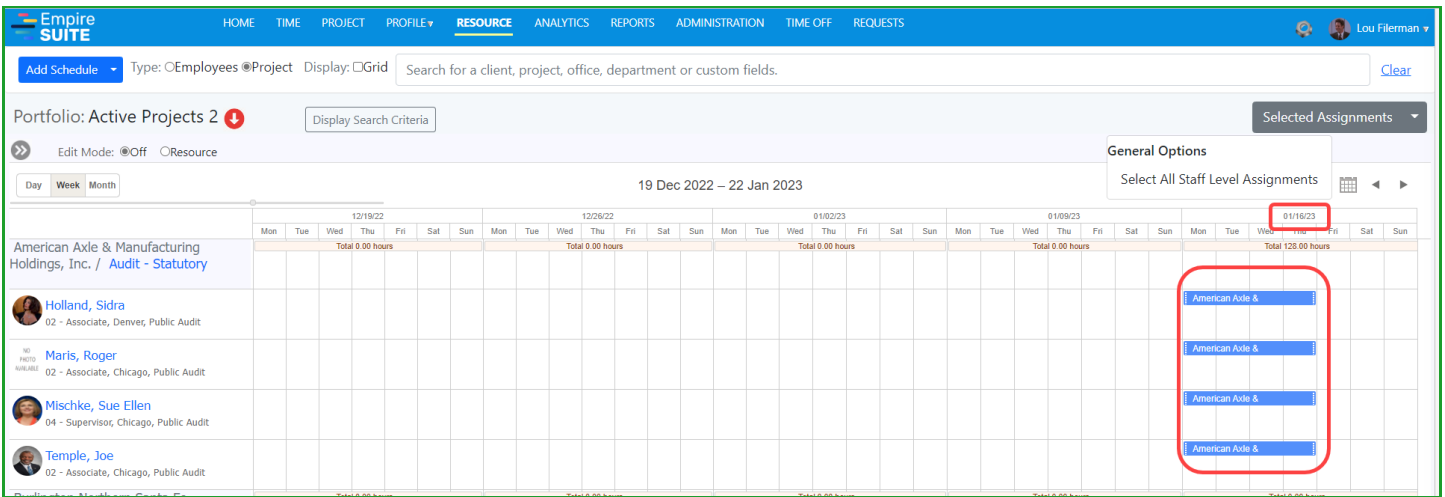


Figure 25 – Selected Assignments After Move By

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. . .

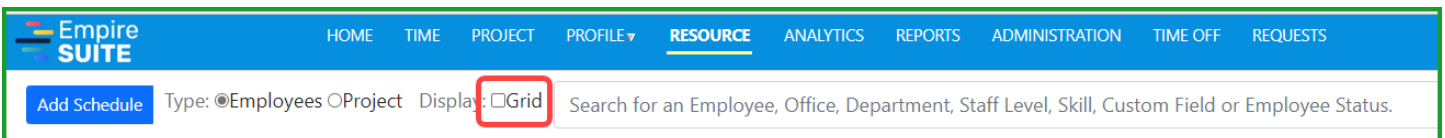


Figure 26 – Empire RESOURCE Grid Mode Checkbox

. . . you can change this view. . .

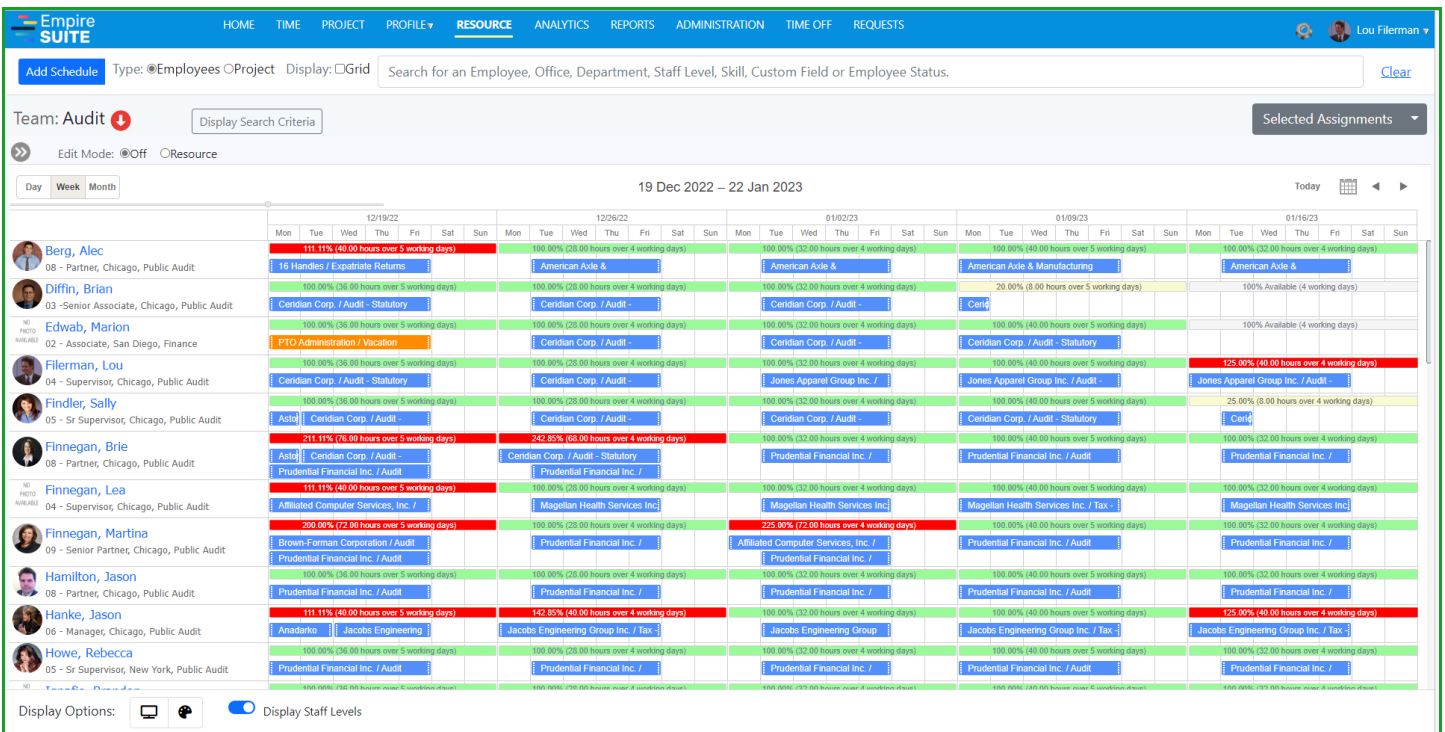


Figure 27 – Empire RESOURCE Calendar View Mode

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

		December 19, 2022 - March 12, 2023														Today	>
Day	Week	Month	Employee/Code	Project	12/19	12/26	01/02	01/09	01/16	01/23	01/30	02/06	02/13	02/20	02/27	03/06	Total
±	Add		Alec Berg (2229)		40.00	28.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	172.00
±	Add		Brian Diffin (2214)		36.00	28.00	32.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	104.00
±	Add		Marion Edwab (8413)		36.00	28.00	32.00	40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	136.00
±	Add		Lou Filerman (2227)		36.00	28.00	32.00	40.00	40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	176.00
±	Add		Sally Findler (8427)		36.00	28.00	32.00	40.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	144.00
±	Add		Brie Finnegan (2228)		76.00	68.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	248.00
±	Add		Lea Finnegan (7245)		40.00	28.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	172.00
±	Add		Martina Finnegan (4556)		72.00	28.00	72.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	244.00
±	Add		Jason Hamilton (2217)		36.00	28.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	168.00
±	Add		Jason Hanke (2216)		40.00	40.00	32.00	40.00	40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	192.00
±	Add		Rebecca Howe (8404)		36.00	28.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	168.00
+	Add		Brandon Ianafio (7244)		36.00	28.00	32.00	40.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	168.00

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:

Empire SUITE
HOME
TIME
PROJECT
PROFILE ▾
RESOURCE
ANALYTICS
REPORT

Add Schedule ▾
Type: Employees Project
Display: Grid

Portfolio: Active Projects 2
Hide Search Criteria
Prudential Financial Inc. x

Edit Mode: Off Resource

Day
Week
Month
19

	12/19/22							12/26/22				
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Prudential Financial Inc. / Audit Services Click to automate all assignments	Total 180.00 hours							Total 140.00 hours				
Finnegan, Brie 08 - Partner, Chicago, Public Audit	Prudential Financial Inc. / Audit							Prudential Financial Inc. /				
Finnegan, Martina 09 - Senior Partner, Chicago, Public Audit	Prudential Financial Inc. / Audit							Prudential Financial Inc. /				
Hamilton, Jason 08 - Partner, Chicago, Public Audit	Prudential Financial Inc. / Audit							Prudential Financial Inc. /				
Howe, Rebecca 05 - Sr Supervisor, New York, Public Audit	Prudential Financial Inc. / Audit							Prudential Financial Inc. /				
<small>NO PHOTO AVAILABLE</small> Ignafio, Brandon 07 - Senior Manager, Chicago, Public Audit	Prudential Financial Inc. / Audit							Prudential Financial Inc. /				

Figure 29 – Selecting All Assignments for a Project

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

The screenshot shows the Empire Suite interface. At the top, there is a navigation bar with options like HOME, TIME, PROJECT, PROFILE, RESOURCE, ANALYTICS, REPORTS, ADMINISTRATION, TIME OFF, and REQUESTS. Below this, there is a search bar with the text "prude" and a "Clear" button. The main area displays a resource grid for "Prudential Financial Inc. / Audit Services" covering the period from 19 Dec 2022 to 22 Jan 2023. The grid shows assignments for five staff members: Finnegan, Brie; Finnegan, Martina; Hamilton, Jason; Howe, Rebecca; and Ignafio, Brandon. A dropdown menu is open next to the "Selected Assignments 5" button, showing options for "General Options".

Figure 30 – Selected Assignments Menu Control

Select Delete All Assignments to delete the selected assignments:

This is a close-up screenshot of the dropdown menu from Figure 30. The menu is titled "General Options" and contains four items: "Display Selected Assignments", "Select All Staff Level Assignments", "Delete Selected Assignments", and "Cancel Selected Assignments". The "Delete Selected Assignments" option is highlighted with a red rectangular box.

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:

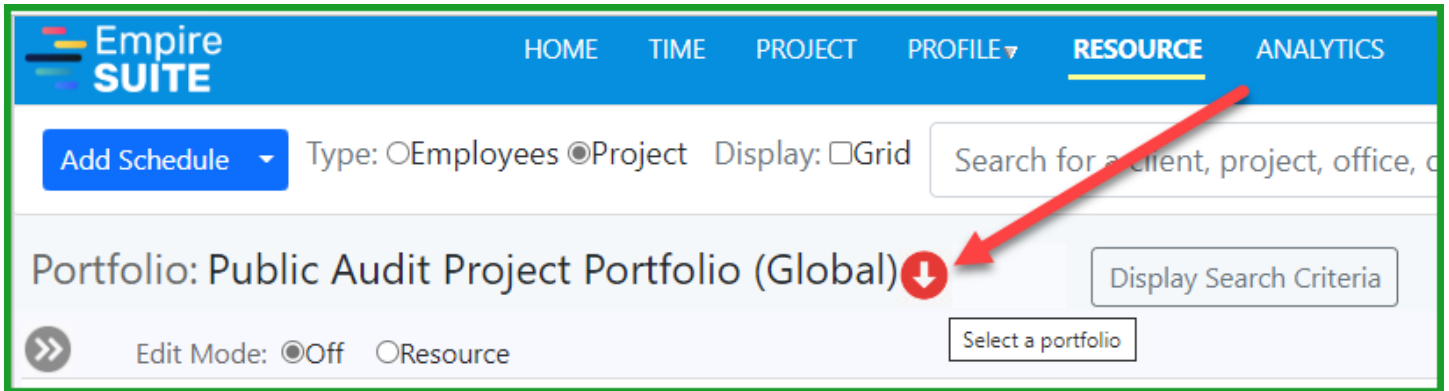


Figure 32 – Select a Portfolio

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

Project Display: Grid Search for a client, p

186

Public Audit Project Portfolio (Global)

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



168

Active Projects 2 (Global)

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



1

CVS Client Portfolio (Global)

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



168

Active Projects (Global)

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



1

New York Projects (Global)

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



Custom Search

All Portfolios

12/19/22							
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
Total 116.00 hours							
16 Handles / Expatriate Returns							
16 Handles / Expatriate Returns							
16 Handles / Expatriate Returns							
Total 80.00 hours							
Affiliated Computer Services, Inc. /							
Affiliated Computer Services, Inc. /							

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:

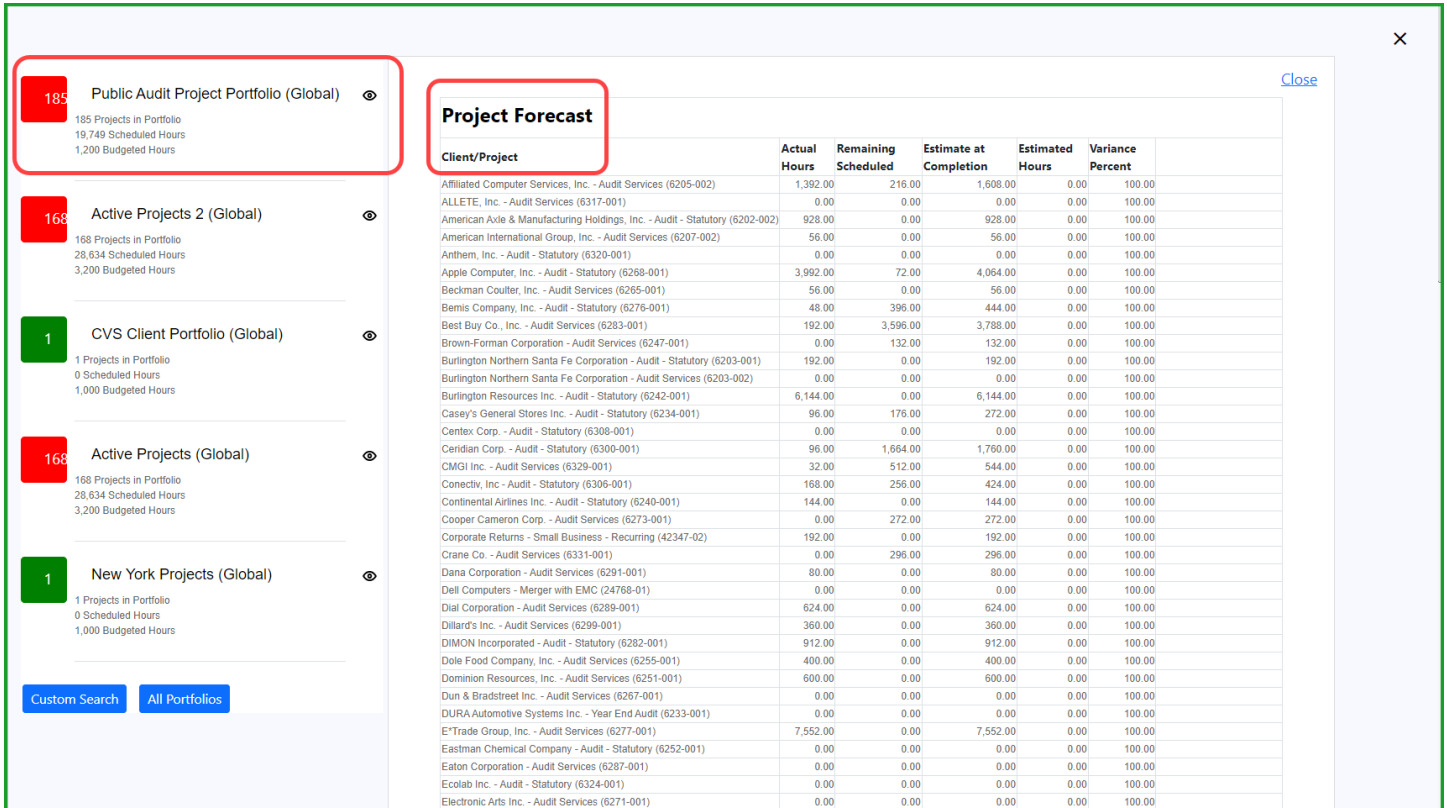


Figure 34 – Project Estimate Information

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:

X Close

Time Off Policies

Calendar for Time Off Policies

US Calendar (Default)
▼

Time Off Type

Vacation - (VACATION)
▼

Time Off Exception Rules

Process PTO Requests as exceptions when total PTO (requests and taken) exceed the limits set below:

Total Requested

Hours

% (Standard Hours)

Calendar Week

Hours

% (Standard Hours)

Calendar Month

Hours

% (Standard Hours)

Calendar Year

Hours

% (Standard Hours)

Date Range

Hours

% (Standard Hours)

Starting days before the request

Ending days after the request

Save

Clear

Delete

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.