What’s New in Empire SUITE August 2023?

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

- Enhanced Performance Evaluations functionality
- Expanded Employee Profile Management functionality
- Assignment summarization
- Improved Teams management
- Best Match improvements
- International phone numbers and address support
- Assignment drill downs in Resource and Analytics
- Future Exception Time events now available in Empire RESOURCE
- Practice Engine integration
- Resource and Project Custom View Toggle
- Include/Exclude Pending PTO Events from Home Page Banner
- Option to sort and view staff in a resource view alphabetically or by staff level alphabetically

Employee Profile Management

We've enhanced our Skills management functionality to include user defined Profile Types. For example, you can add an Industry profile type so you can keep track of staff industry expertise or Certifications profile type to keep track of staff certifications such as CPA, CFE, MBA, etc. From the Profile menu, select Setup Profile Type:

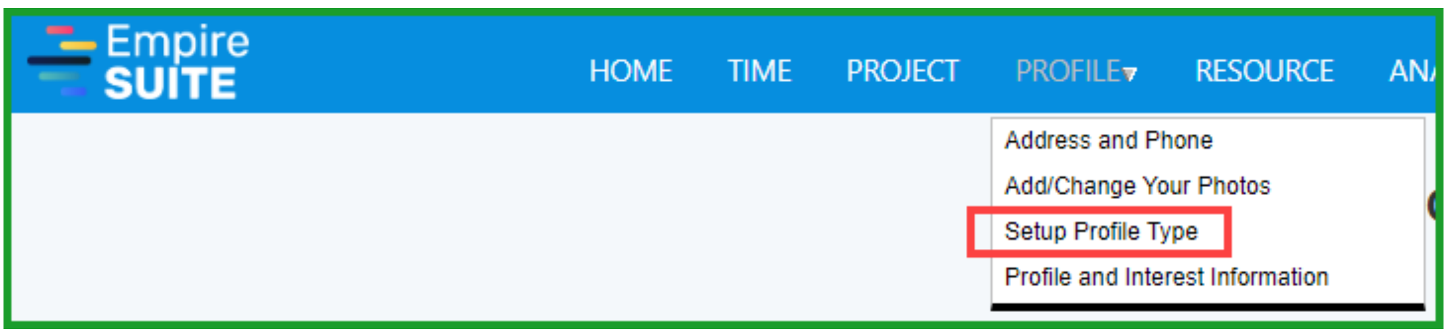
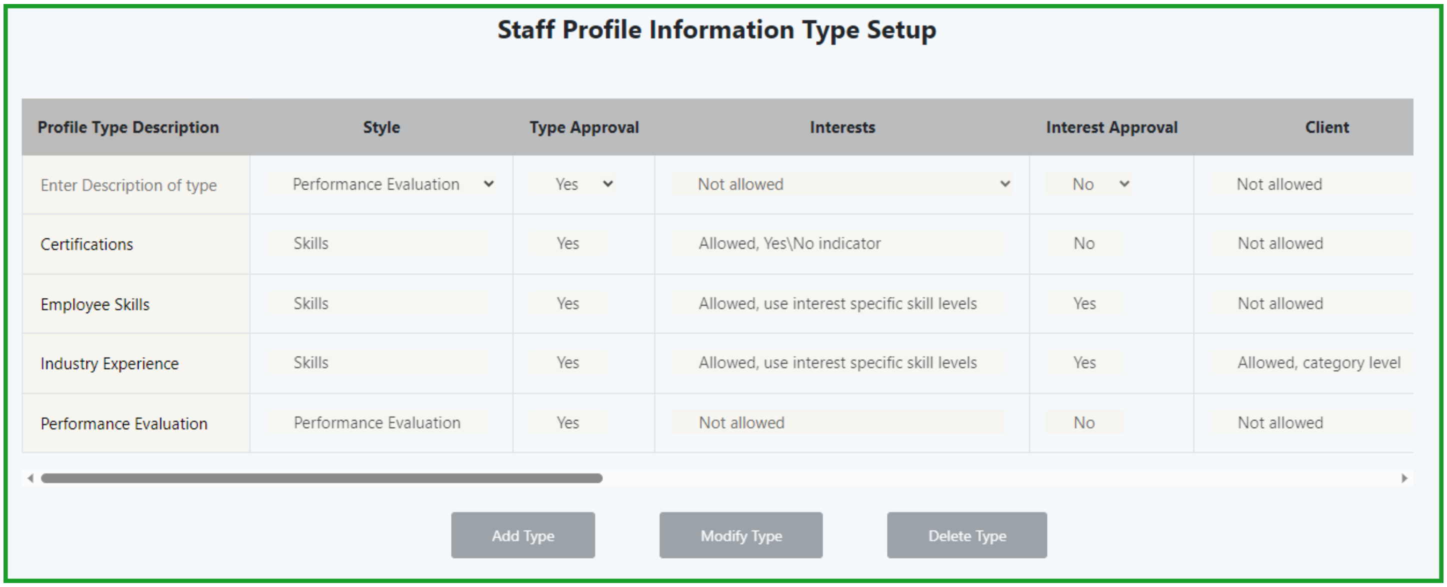


Figure 1 – Setup Profile Type

Depending on the Profile Type, the Style can be Skills-based or Performance Evaluation-based:



Staff Profile Information Type Setup

Profile Type Description	Style	Type Approval	Interests	Interest Approval	Client
Enter Description of type	Performance Evaluation	Yes	Not allowed	No	Not allowed
Certifications	Skills	Yes	Allowed, Yes\No indicator	No	Not allowed
Employee Skills	Skills	Yes	Allowed, use interest specific skill levels	Yes	Not allowed
Industry Experience	Skills	Yes	Allowed, use interest specific skill levels	Yes	Allowed, category level
Performance Evaluation	Performance Evaluation	Yes	Not allowed	No	Not allowed

Figure 2 – Staff Profile Type Setup

As with Skills, you can define proficiency levels as your company requires, and depending on the profile type, your staff can indicate whether or not they are 'interested' in a particular skill or industry. Interest in a particular skill or industry indicated by staff can be used when creating assignments.

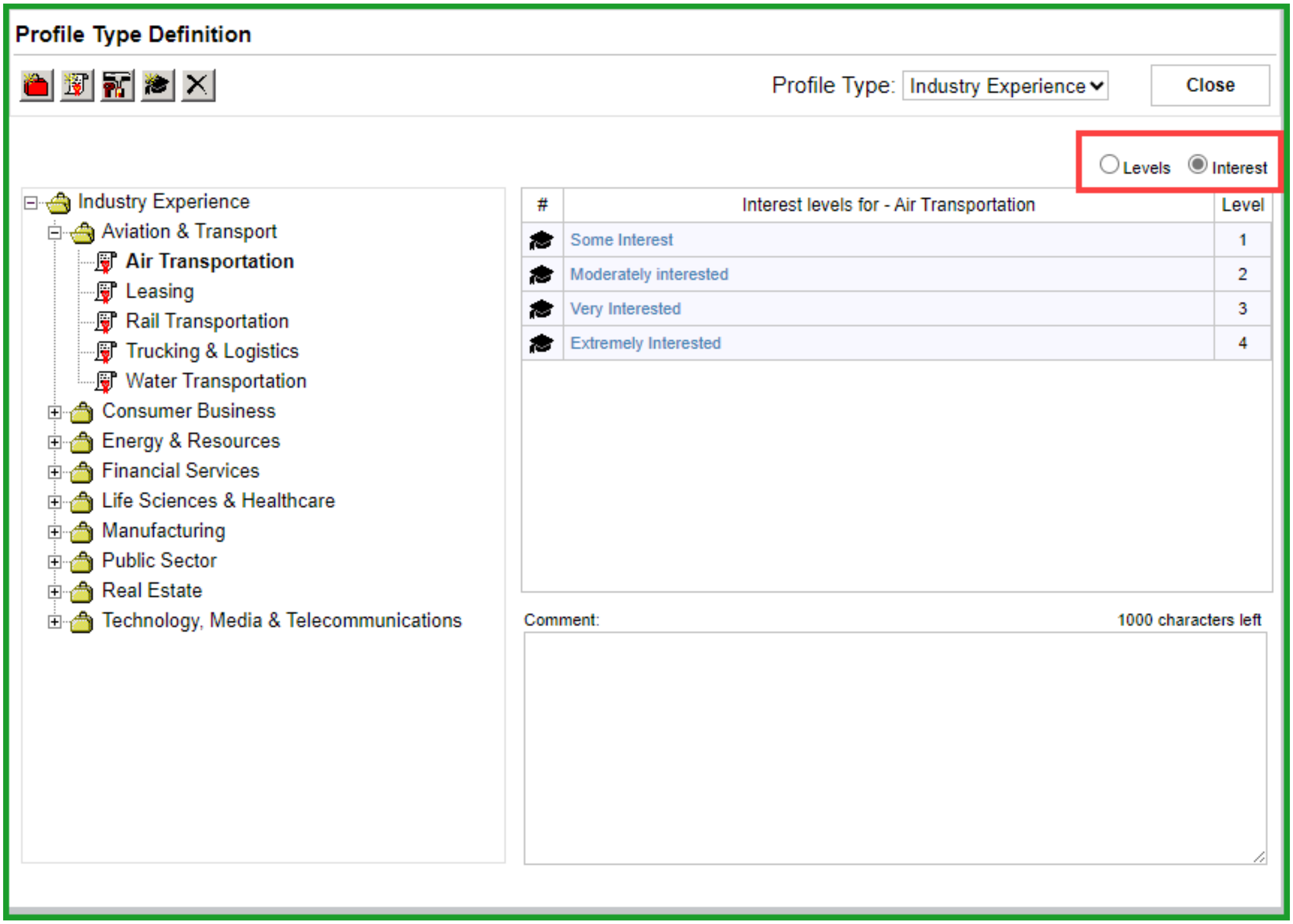


Figure 3 – Defining Interest Levels

There are Excel-based imports available for adding detailed profile type information as well as importing proficiency levels and interest levels

Managing Profile Types and Interests

If you allow your staff to self-assign their proficiency level in a specific Profile Type, you can now require manager approval for assessments outside of a defined range. For example, an employee may define themself as a native Spanish speaker or an Expert in Mergers & Acquisitions, but you can require a manager to approve the assessment before it is applied to the staffer:

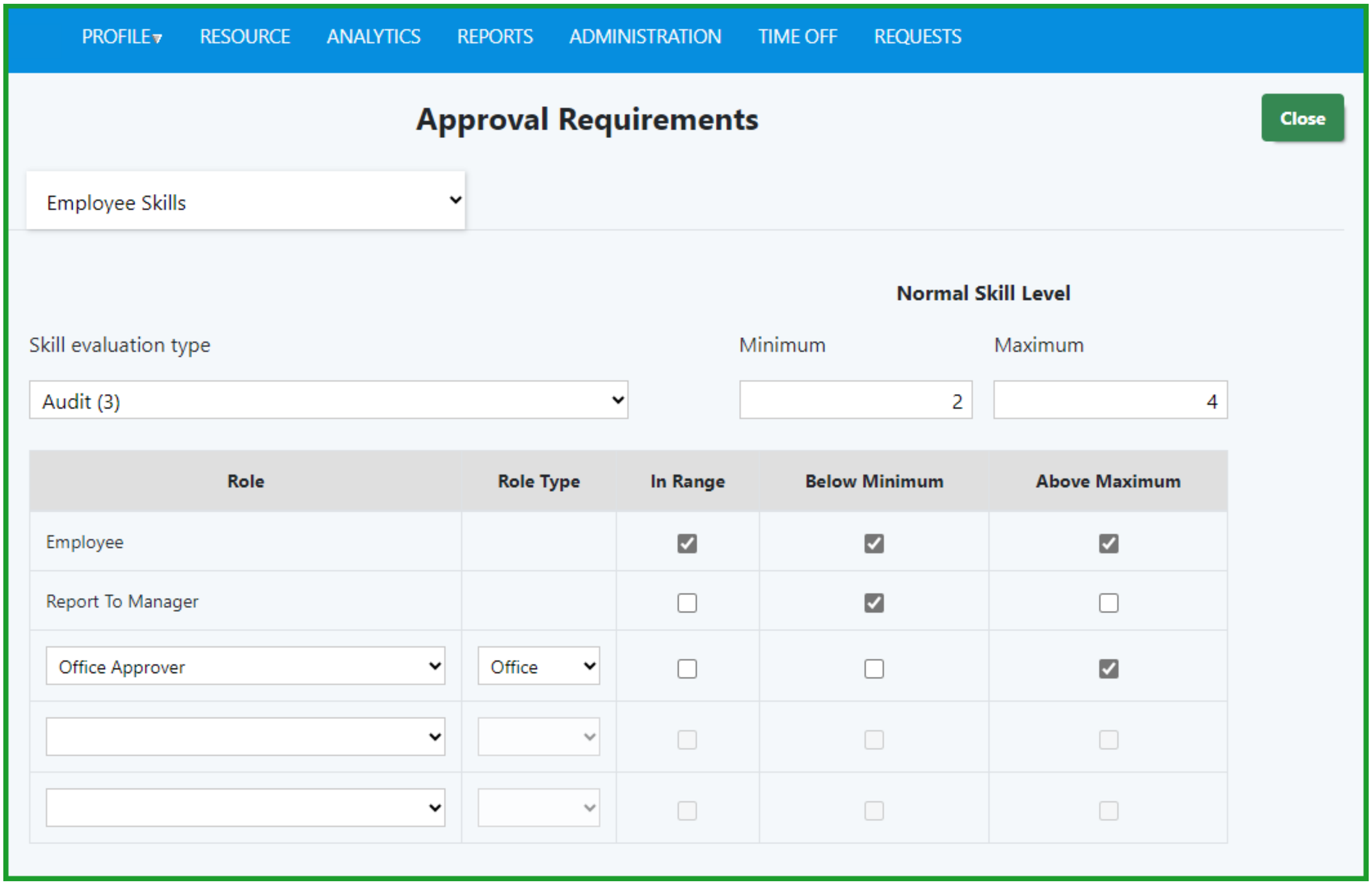


Figure 4 – Employee Profile Approval Setup

Staff can define their interest level in a Profile Type from the Profile and Interest Information page:

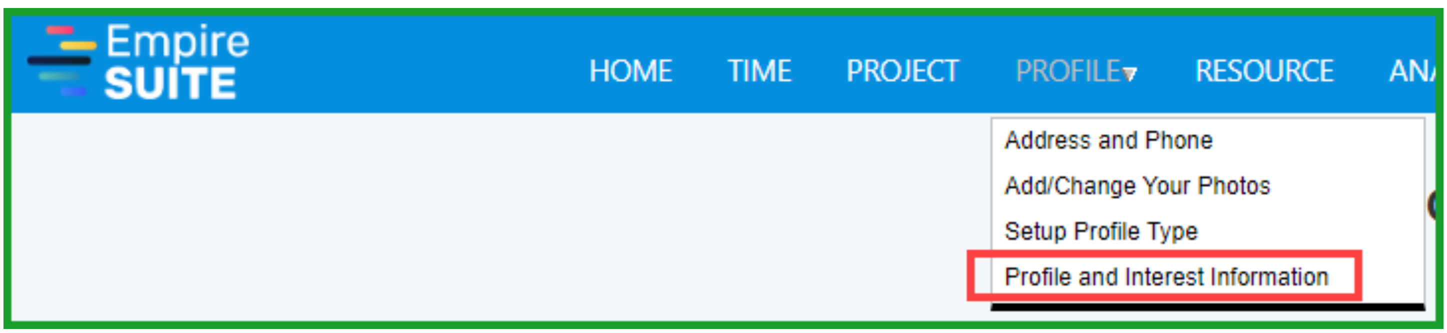


Figure 5 – Profile and Interest Information

Users can define their level interest for all the defined profile types:

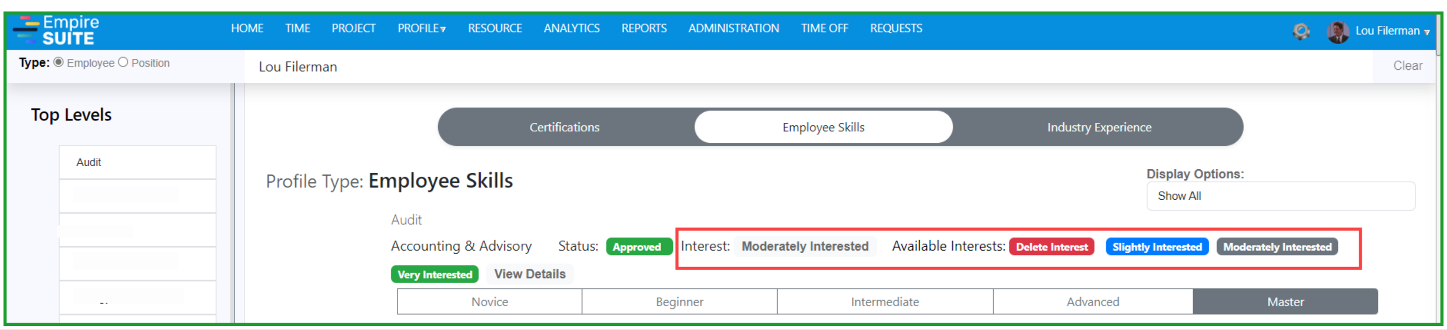


Figure 6 – Interest Levels

Improved Teams and Portfolio Management

We've changed the way users can manage Teams and Portfolios and update Team/Portfolio information. When you're working with a Team or Portfolio, click the Pencil Icon to either edit the Current View or switch to a Custom View and Edit the selection criteria:

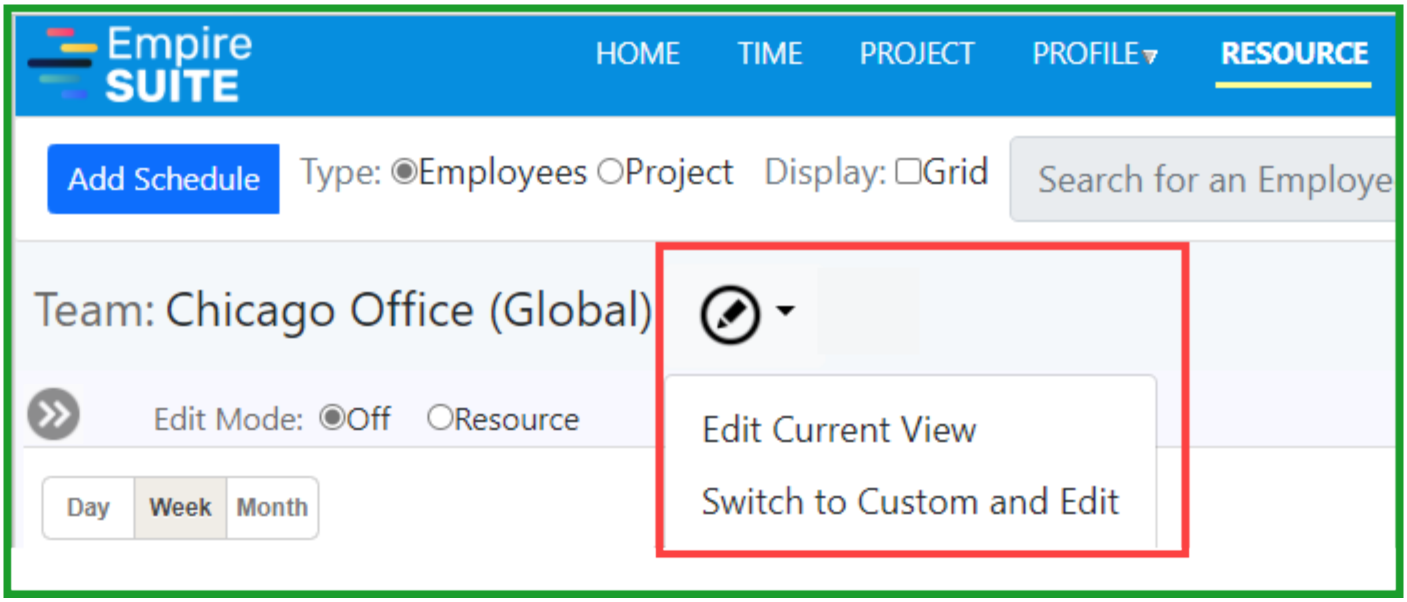


Figure 7 – Editing Teams

Mousing over the **Red** down arrow enables several options:

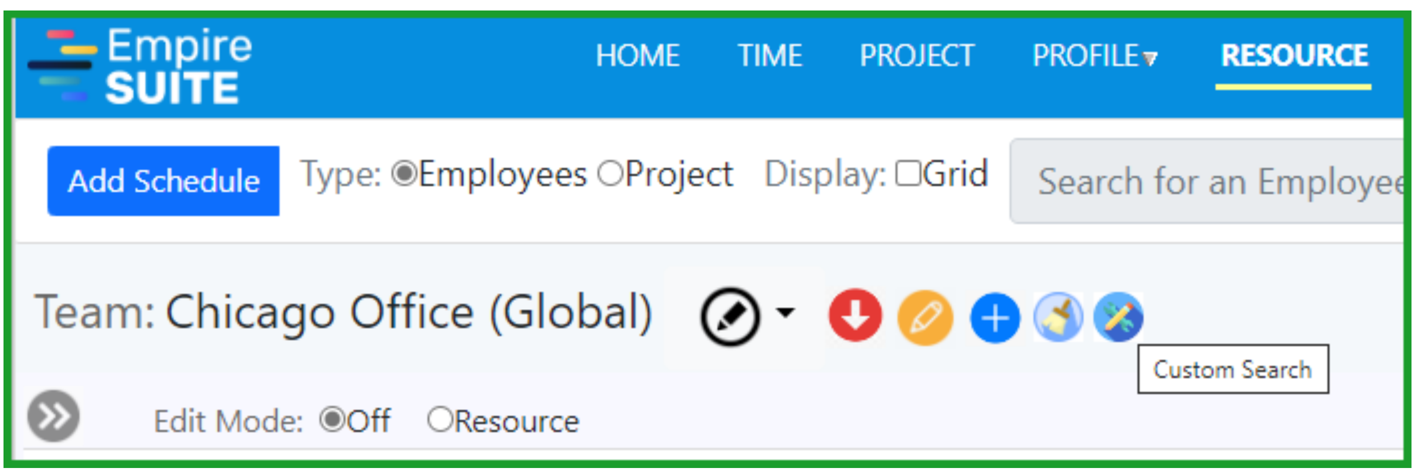


Figure 8 – Teams Management Options

- The red 'Down Arrow' icon launches the Teams management page showing up to three (3) of the most recently used Teams. Click All Teams. . .

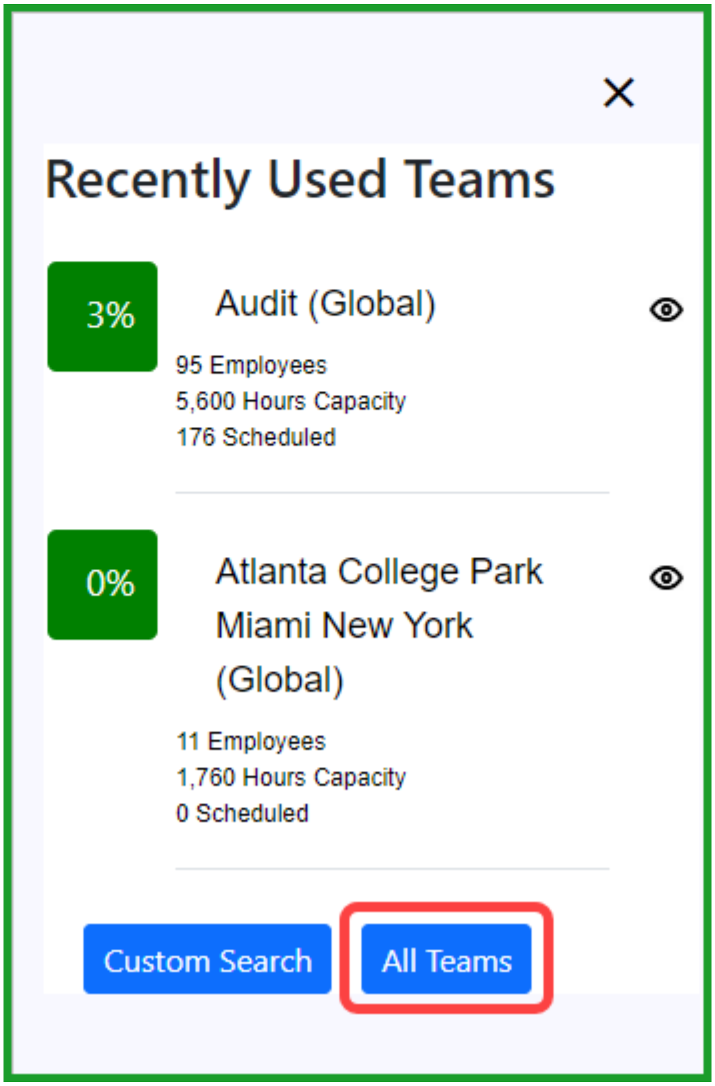


Figure 9 – All Teams

. . .and select a Team Type to see the available Teams based on the Team attributes:

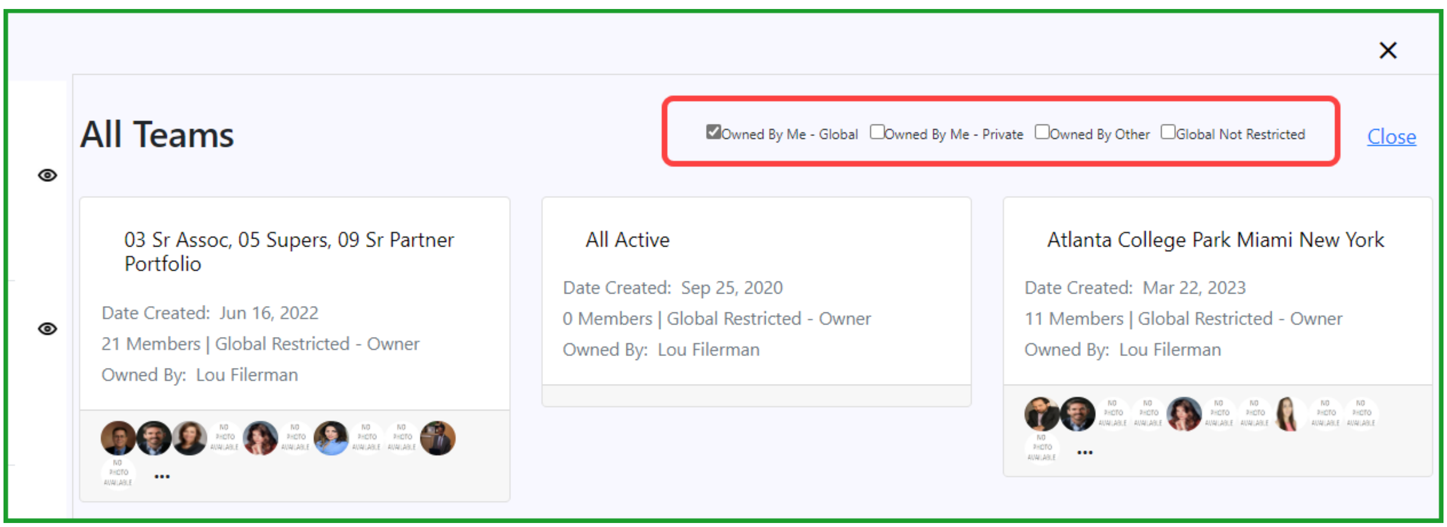


Figure 10 – Team Types

- The yellow ‘Pencil’ icon launches the Edit Team page:

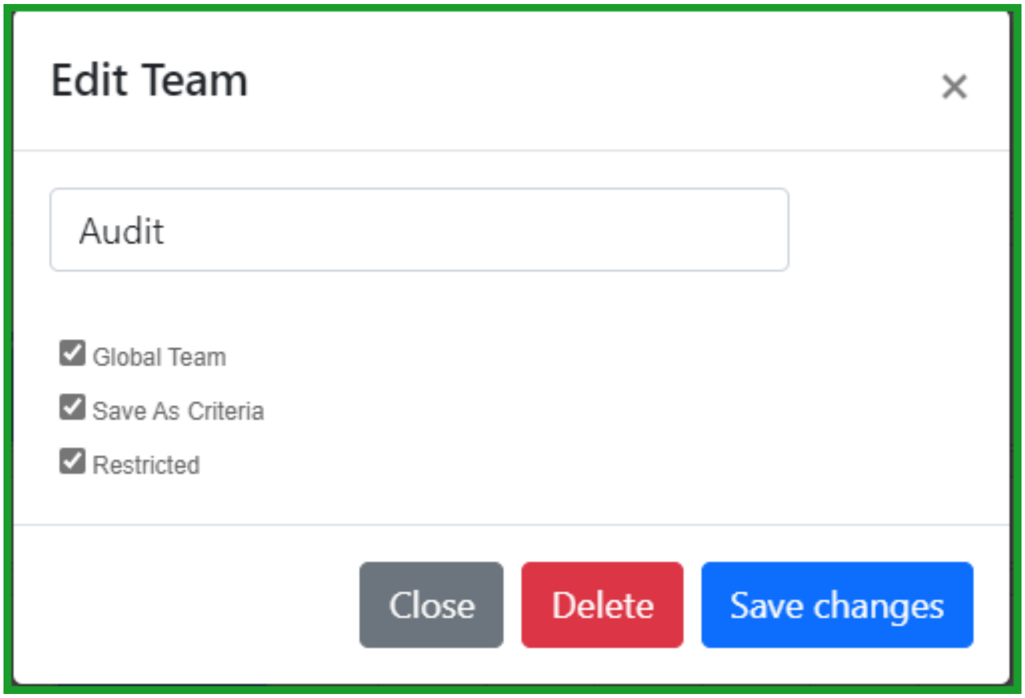


Figure 11 – Edit Team Page

- The blue ‘Plus’ icon launches the Create a New Team page

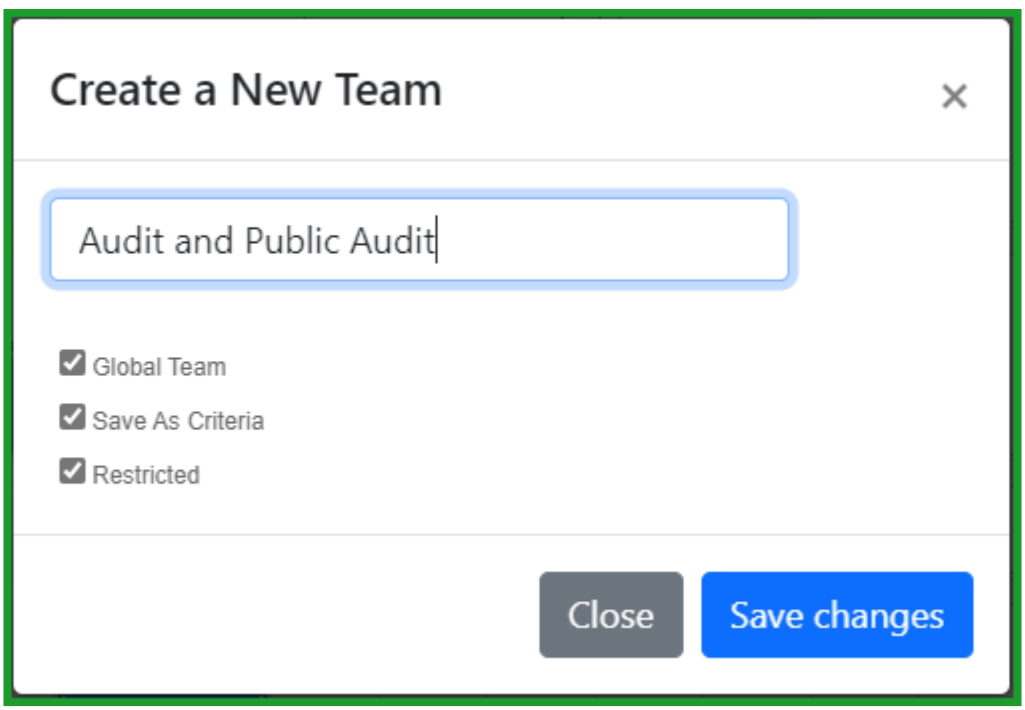


Figure 12 – Create a New Team

- The white/blue paint brush option clears all the Team tags
- The light blue ‘Pencil and Wrench’ icon launches the Custom Search view which displays search results from the most recent custom search session.

We also added a new permission to allow users to manage global restricted teams when they are not the team owner.

Saved and Named Assignment Requirements

You can now save assignment requirements and name the requirements set so it can be used again without having to redefine the requirements each time.

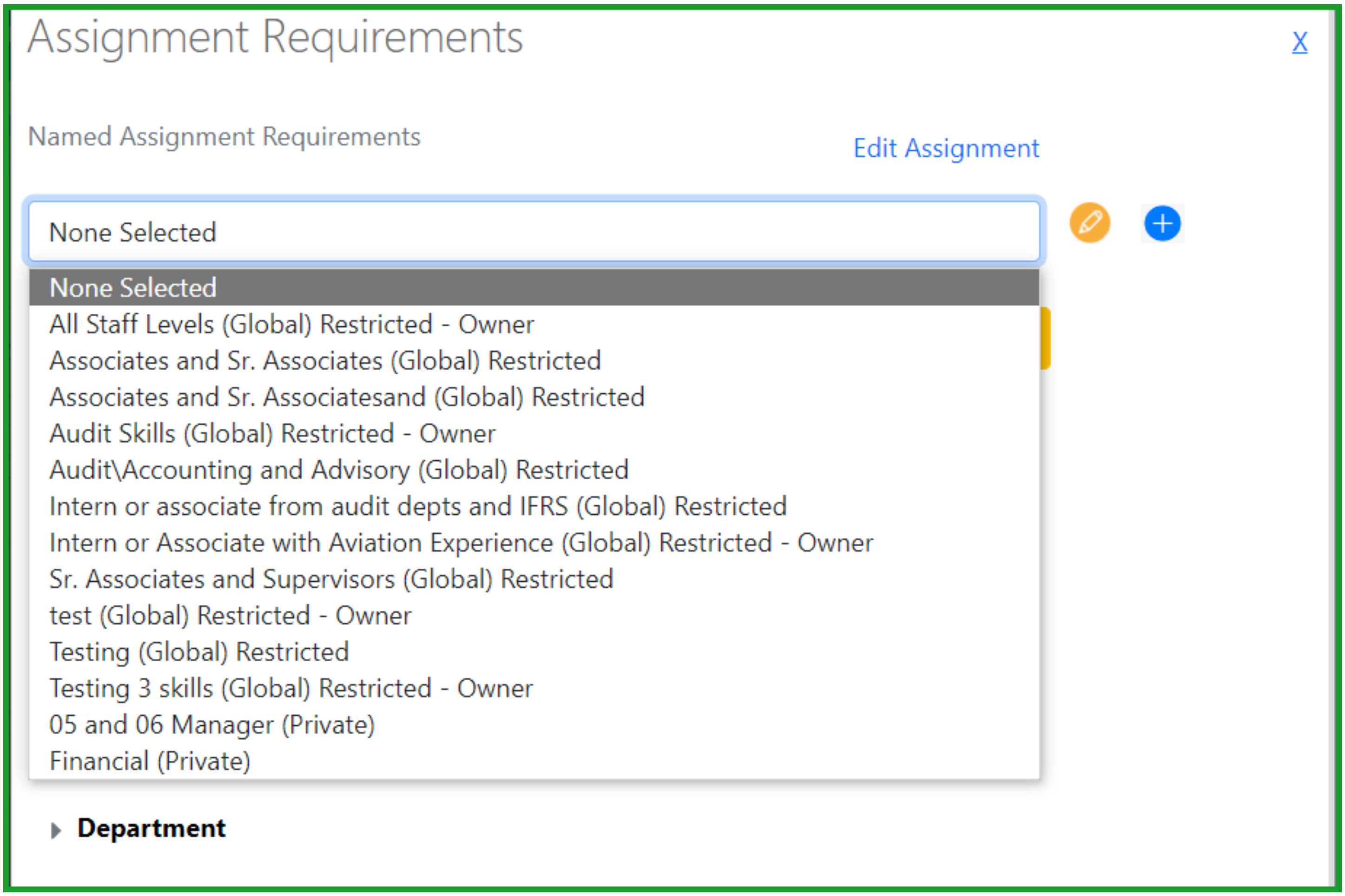


Figure 14 – Saved Assignment Requirements

Improved Best Match Scheduling

Best Match scheduling now includes matching assignment requirements (Staff Levels, Offices, Departments and Skills) with employee interest in the particular requirement. For example, if an Assignment requires Audit Skills. . .

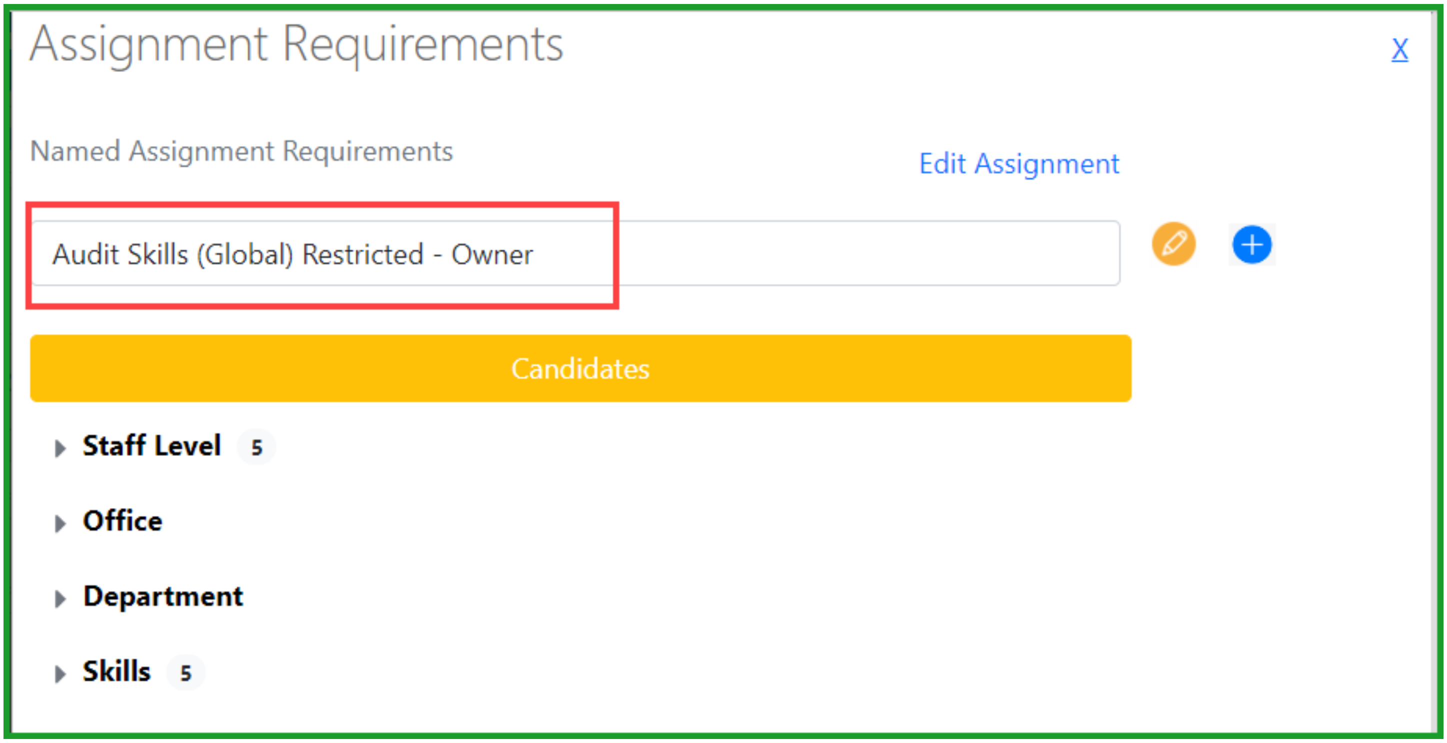


Figure 15 – Audit Skills Requirements

. . .you can click the Candidates bar and see which candidates meet the assignment requirements and which candidates are interested in the skills required for the assignment:

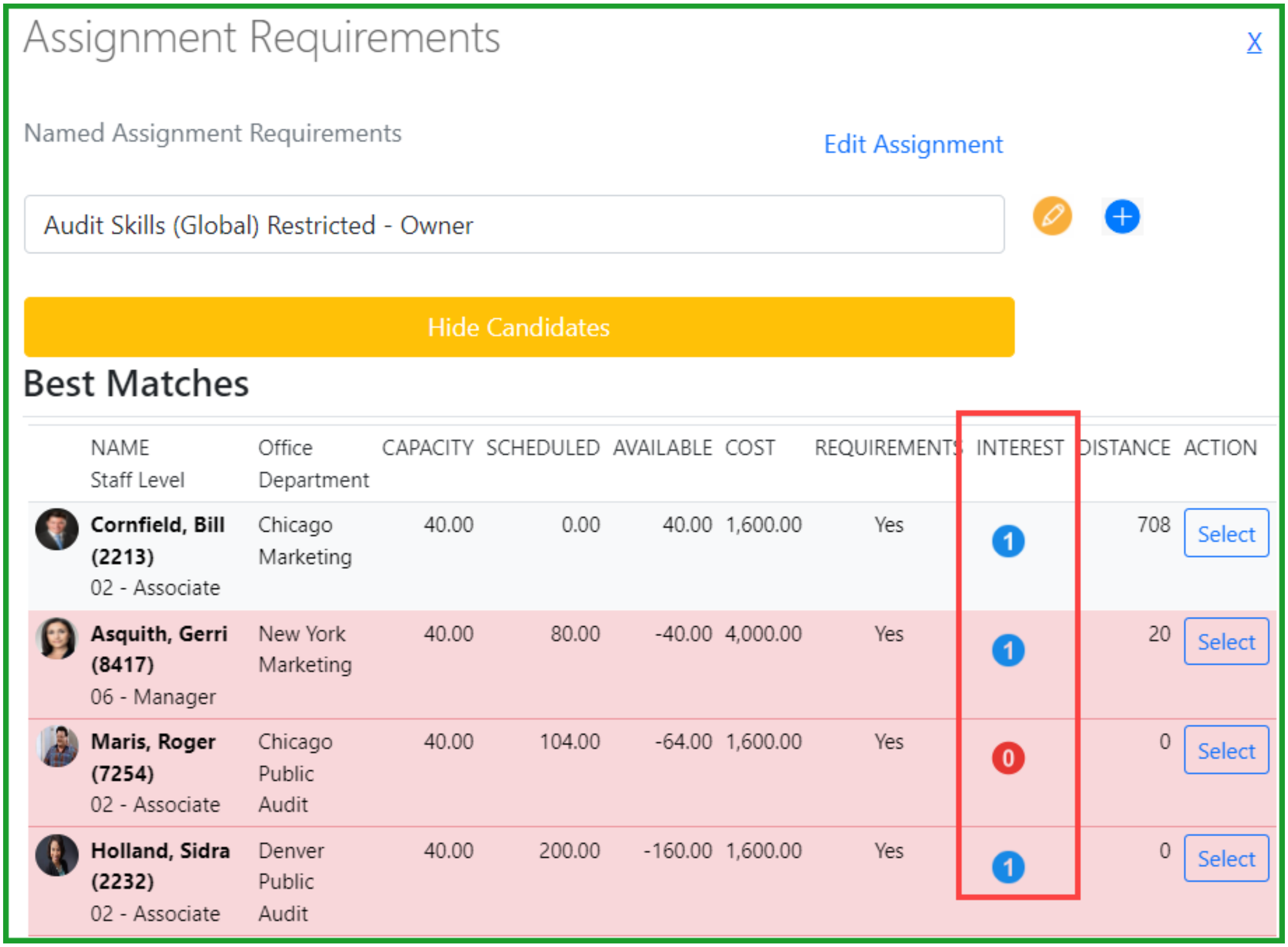


Figure 16 – Candidates and Interests

You can also launch the Assignment requirements page by mousing over the assignment and clicking the three-bar icon:

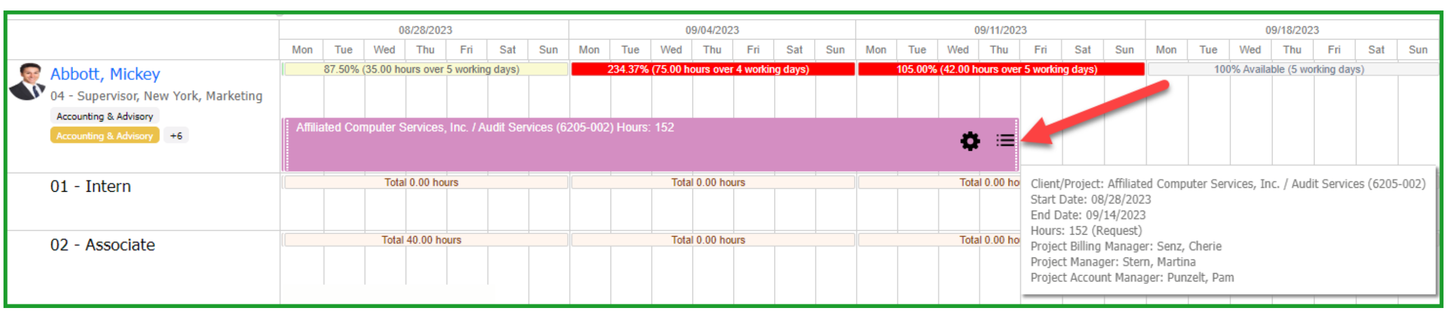


Figure 17 – Assignment Requirements Link

Best Match automation can also help you find the optimal resource based on several factors:

- Travel Distance – Office to Employee Home
- Cost – based on the employee or staff level cost rate
- Interest – You can prioritize based on Employee Interest in the particular assignment requirements

Please note you can select either prioritize by Cost or by Employee Interest, but not both:

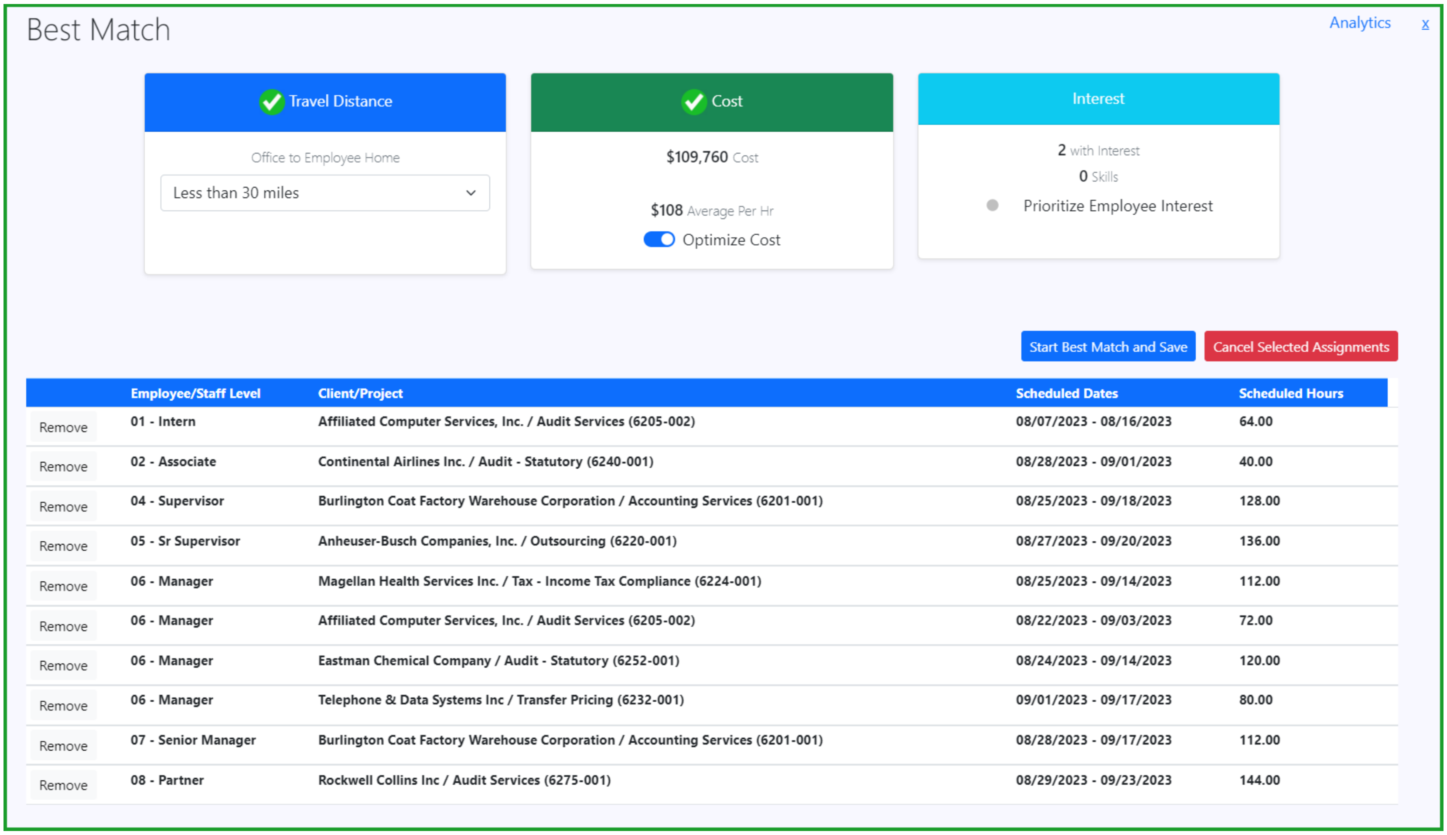


Figure 18 – Best Match Priorities

Assignment Drill Downs in Resource Project View Grid Mode

You can drill down on project assignments in Resource grid mode by clicking the Expand icon:

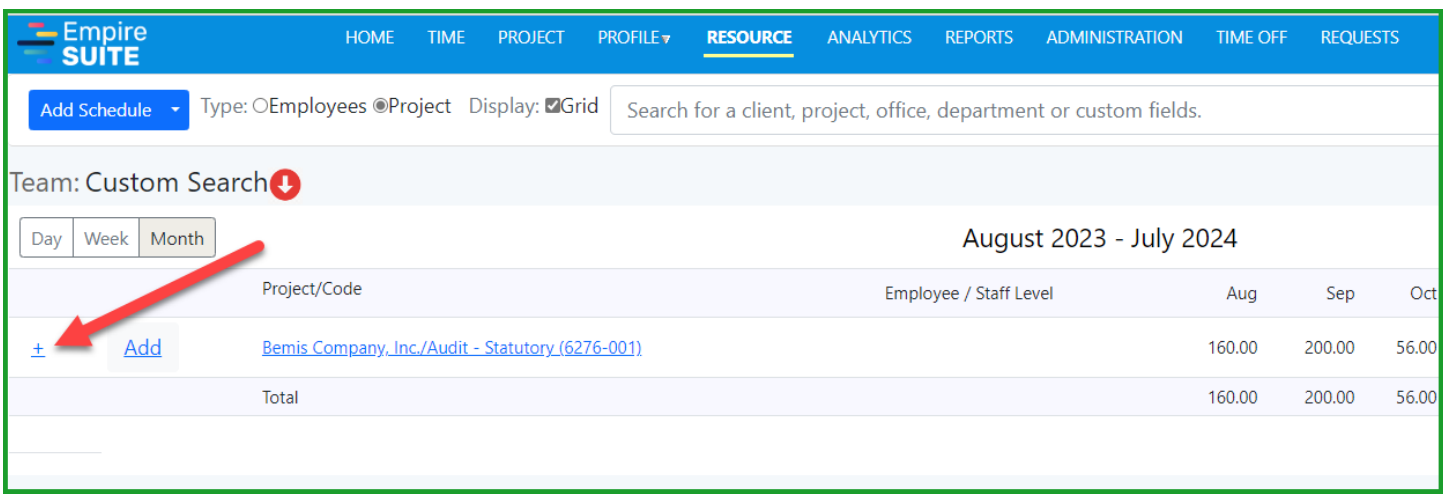


Figure 19 – Project View Grid Mode Drill Down

Clicking the expand icon will display all the assigned staffers:

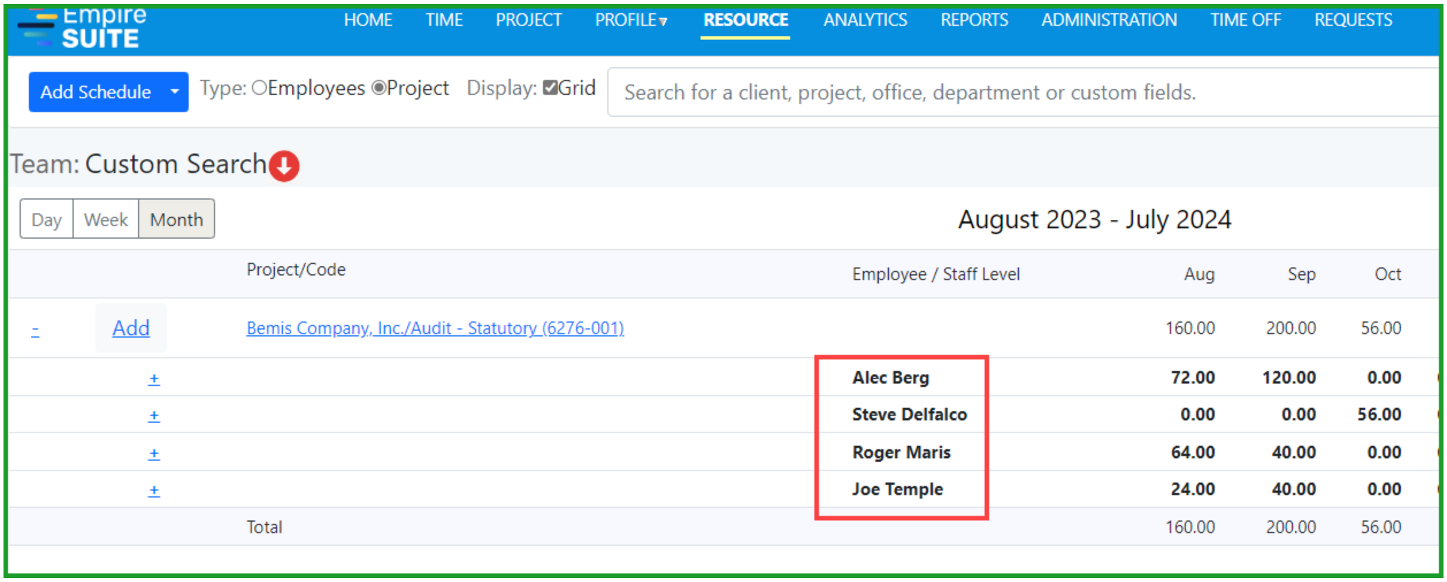


Figure 20 – Expanded Project View

Summarize Assignments into a Single Row

You can now view multiple assignments for the same staffer in a single, summarized row in Project view mode in the Analytics page or in the Resource page in Grid mode. In the example below, Alec Berg has several assignments on the Bemis Company Audit in August and September:

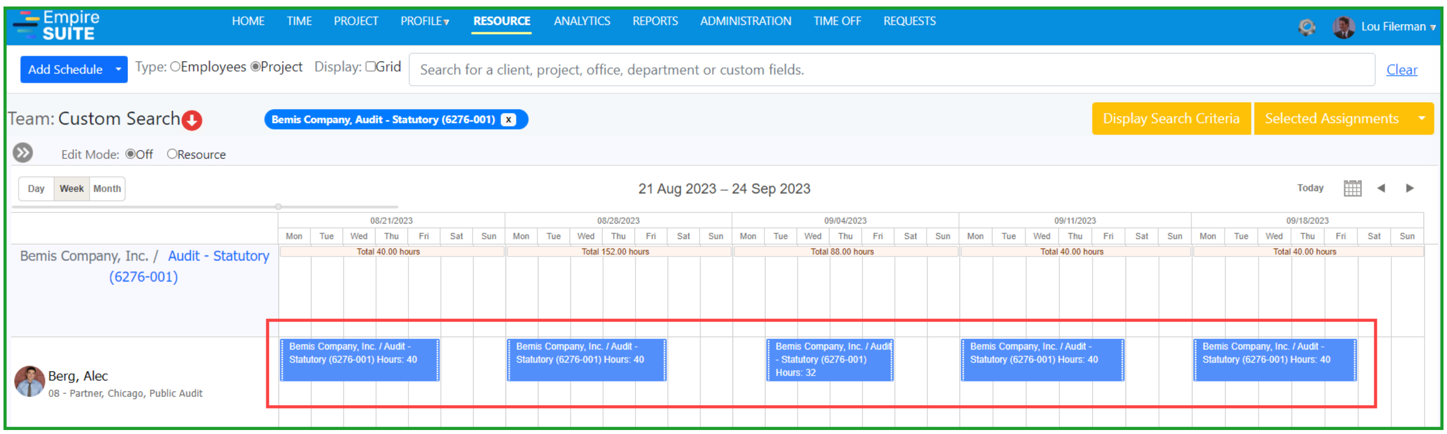


Figure 21 – Multiple Assignments

However, in Resource Grid mode, you can see them in a single row. . .

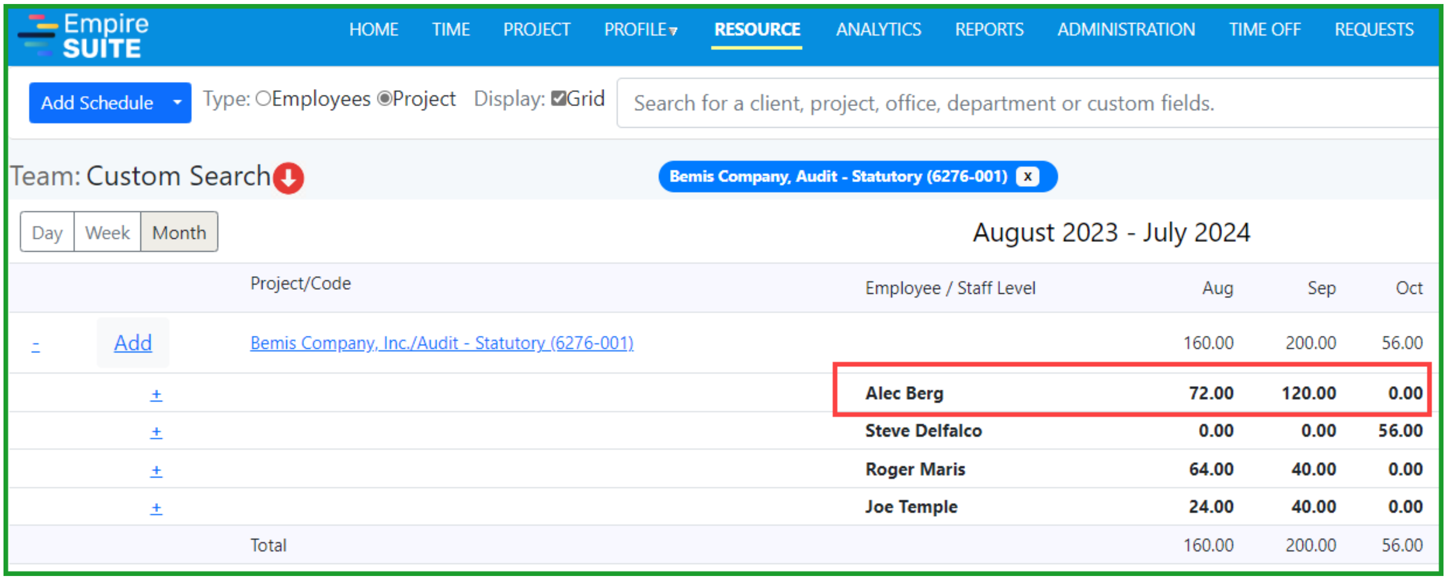


Figure 22 – Summarized Assignments

. . .or you can see each assignment in a separate row:

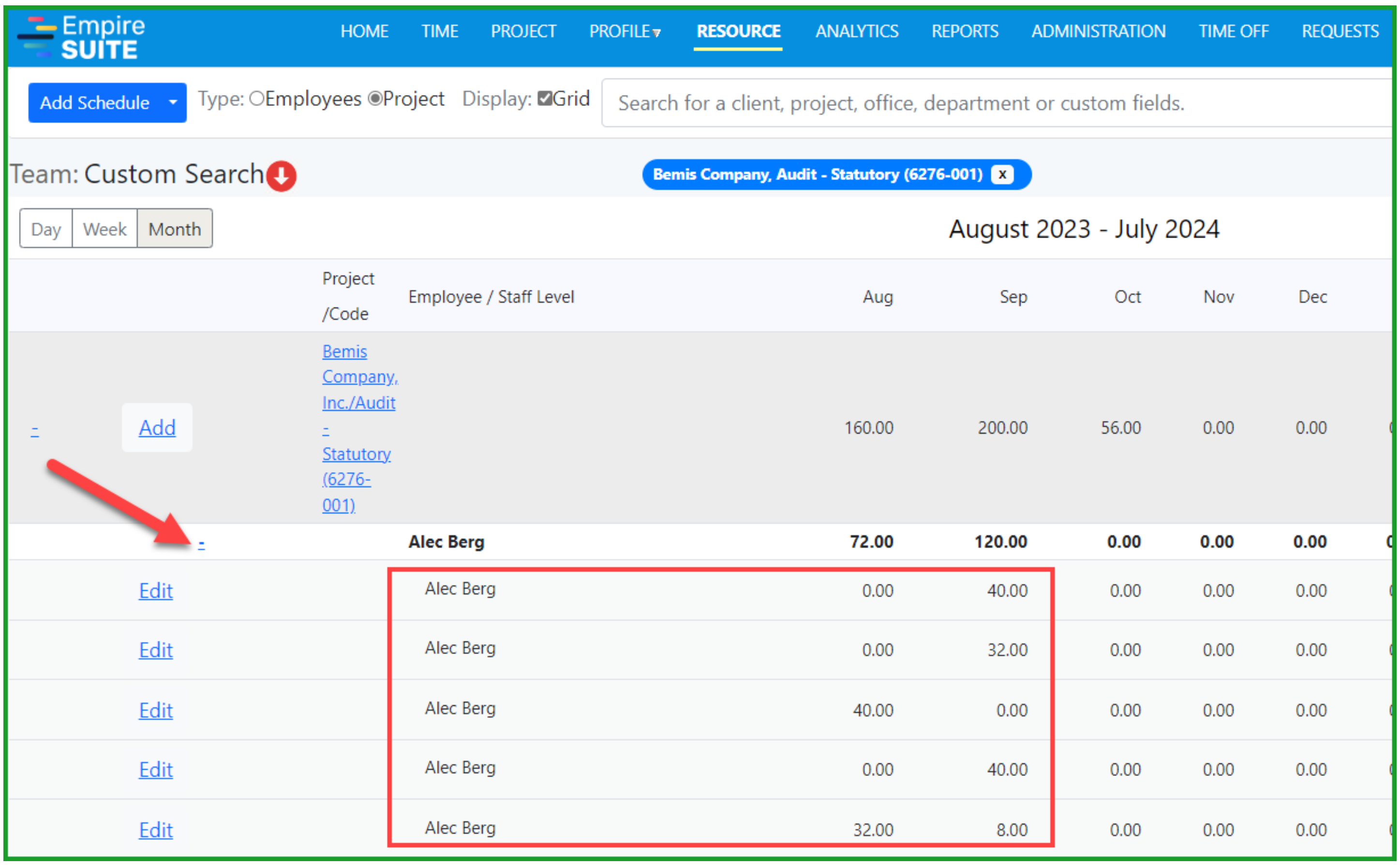


Figure 23 – Assignments by Row

Practice Engine Integration

We are pleased to announce integration between Practice Engine™ and Empire SUITE. Our integration uses the Practice Engine APIs to populate employees, clients and jobs (projects) in Empire SUITE. Filtering options based on Empire SUITE Teams and Portfolios are available so users can control the downloaded data:

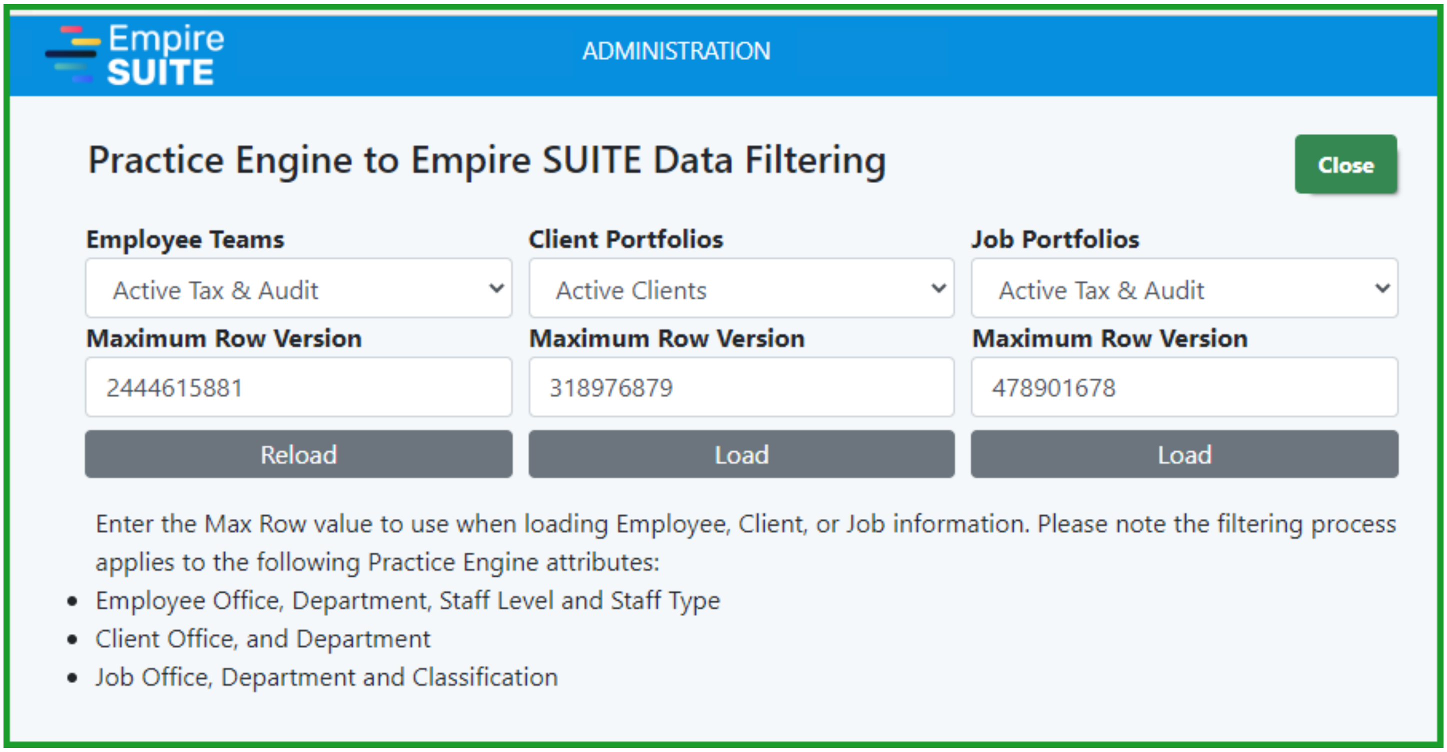


Figure 24 – Practice Engine Integration Data Filtering

Users can also control when the integration queries the Practice Engine database to downloaded updated employee, client and jobs data:

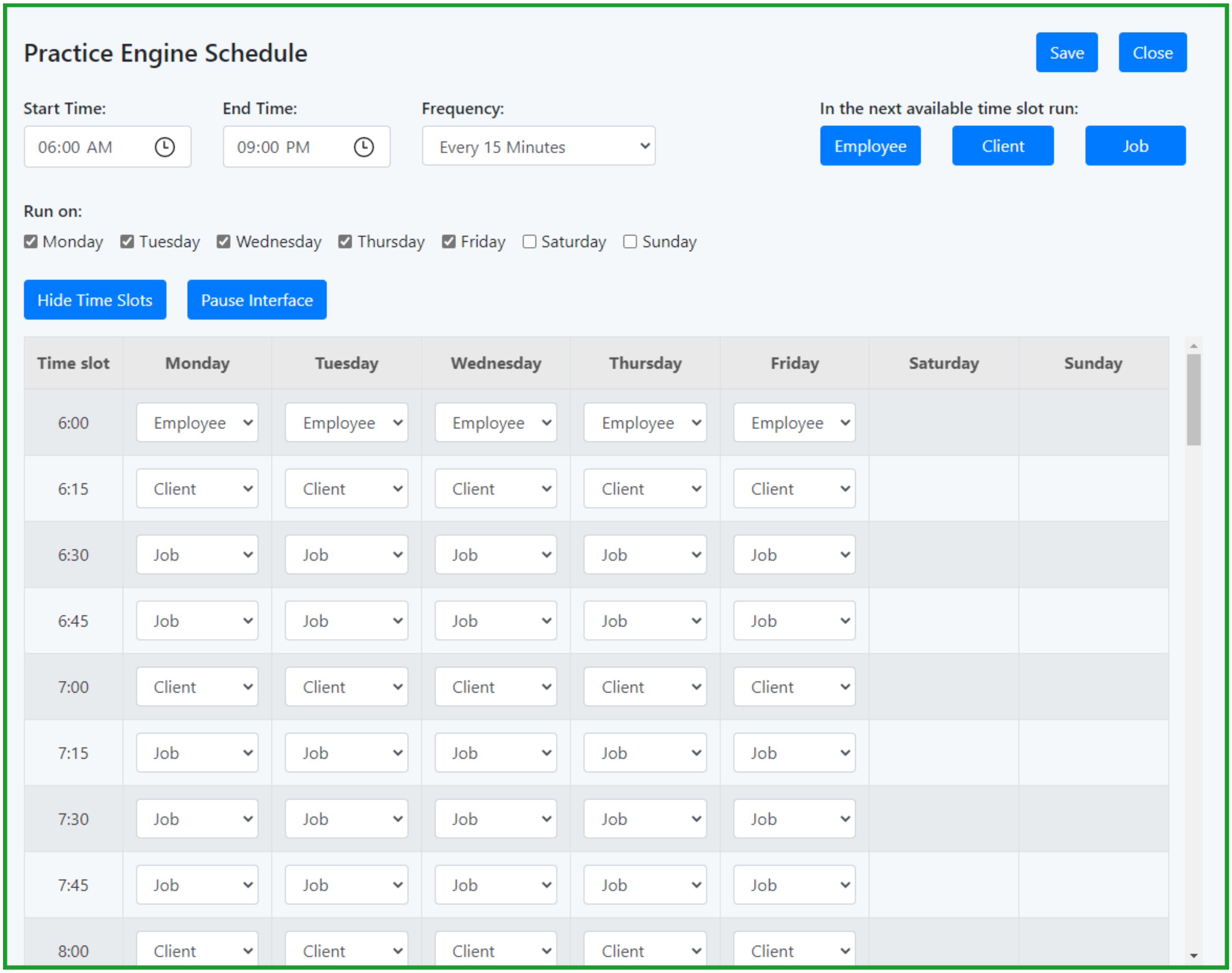


Figure 25 – Practice Engine Integration Schedule

If your firm uses Practice Engine for practice management, let us show you how integration between the two applications will improve your ability to schedule your employees more effectively for audit, tax compliance and CAS jobs.

Include/Exclude Pending PTO Events

We've added the ability to include or exclude Pending PTO Events from the Home Page banner. Click the Funnel icon to open the filter and click the checkbox to include Pending PTO events as appropriate:

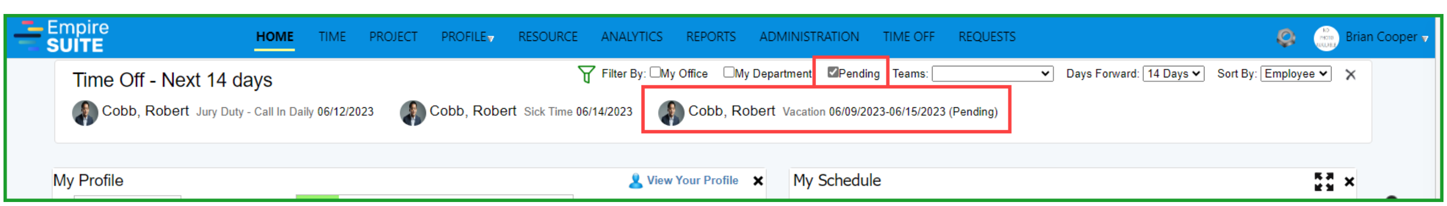


Figure 26 – Pending PTO Events

Option to sort and view staff in a resource view alphabetically or by staff level alphabetically

We’ve added an option in the Resource Display Options to allow users to view employees either alphabetically or alphabetically by staff level:

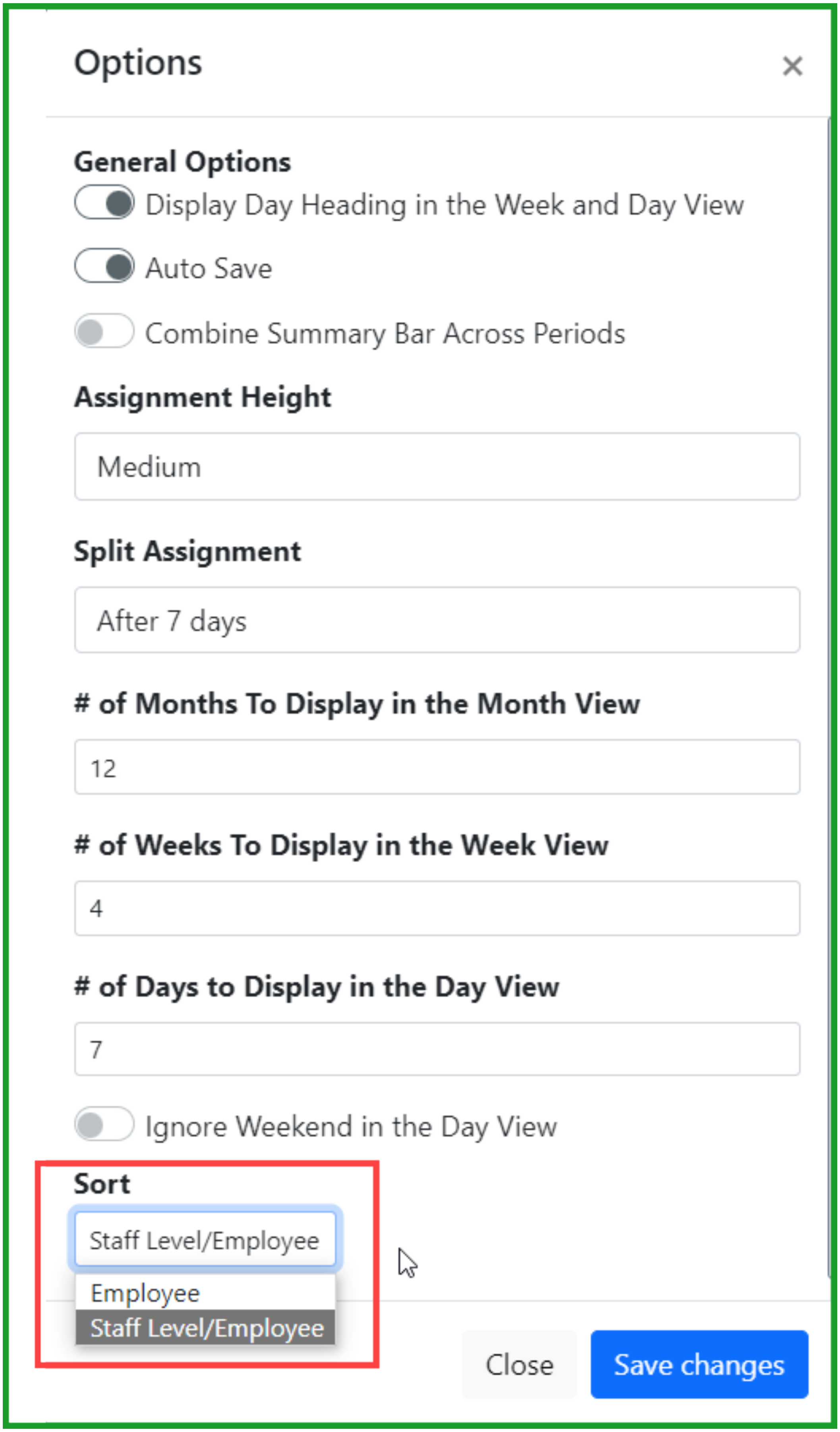


Figure 27 – Resource Page Staff View Options

Users are now sorted alphabetically, but by staff level:

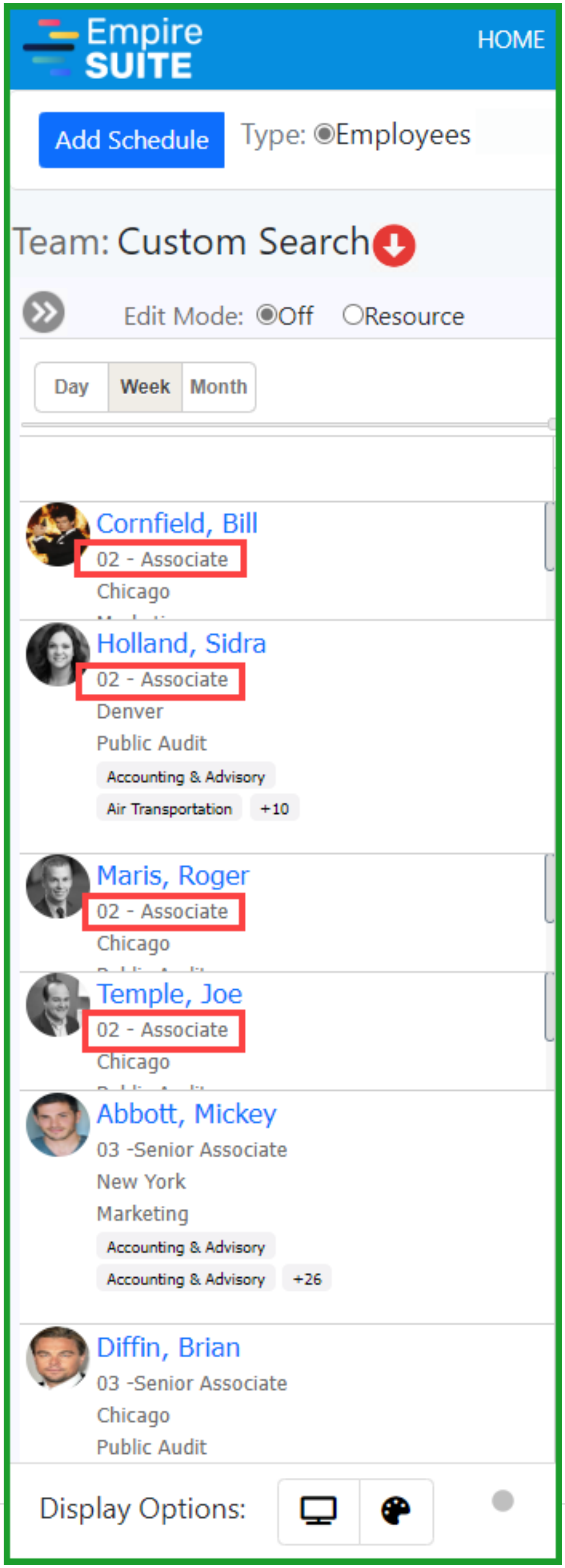

Empire SUITE
HOME
Add Schedule
Type: Employees
Team: Custom Search
Edit Mode: Off Resource
Day
Week
Month
Cornfield, Bill
02 - Associate
Chicago
Holland, Sidra
02 - Associate
Denver
Public Audit
Accounting & Advisory
Air Transportation
+10
Maris, Roger
02 - Associate
Chicago
Temple, Joe
02 - Associate
Chicago
Abbott, Mickey
03 -Senior Associate
New York
Marketing
Accounting & Advisory
Accounting & Advisory
+26
Diffin, Brian
03 -Senior Associate
Chicago
Public Audit
Display Options:

Figure 28 – Alphabetically by Staff Level Mode

Home Page Improvements – Opportunities and Skills/Interests Buttons

We've added Skills and Interests and Review Opportunities buttons to the user's home page when the user is configured in Full Screen mode:

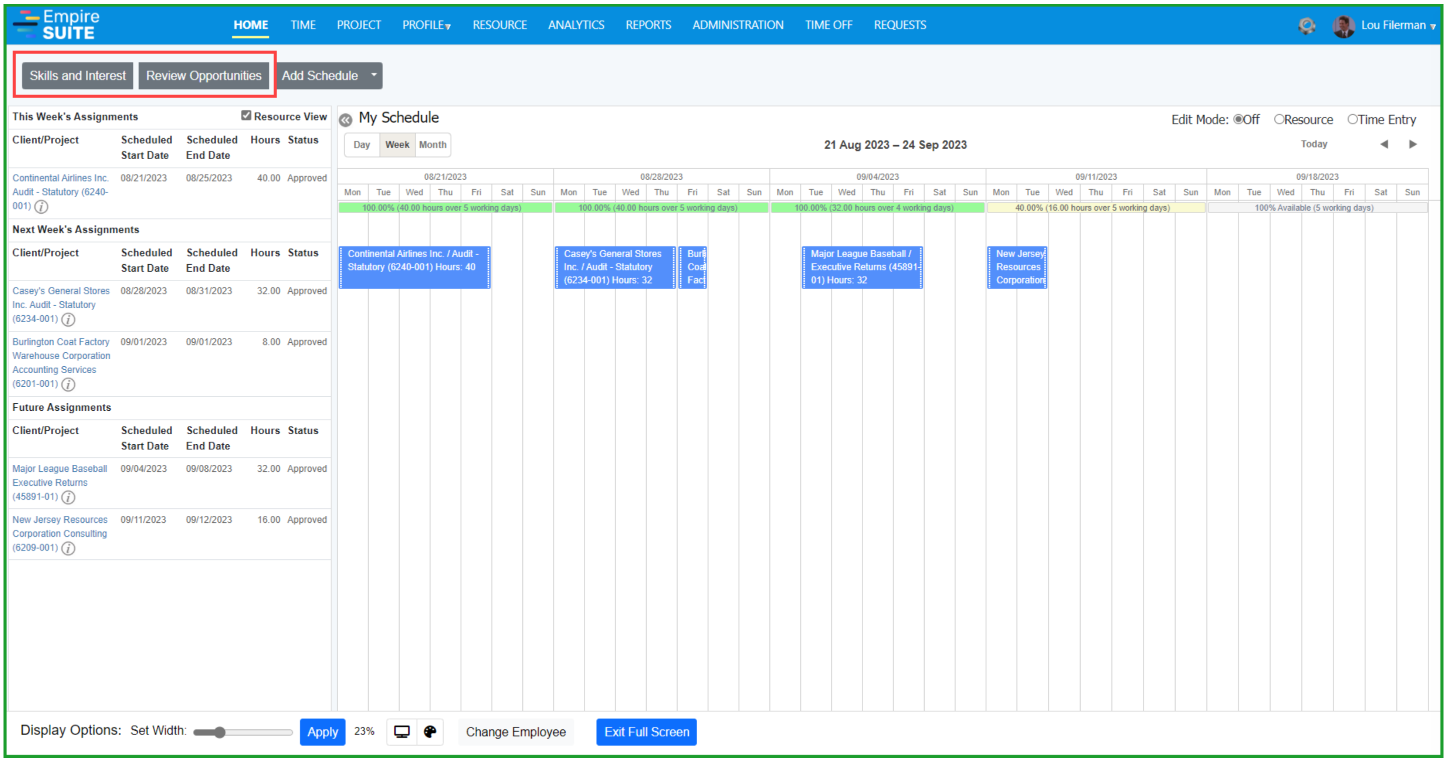


Figure 29 – Opportunities and Skills Home Page Buttons

Employee Profile and Custom Fields

The employee profile page now includes Custom Fields:

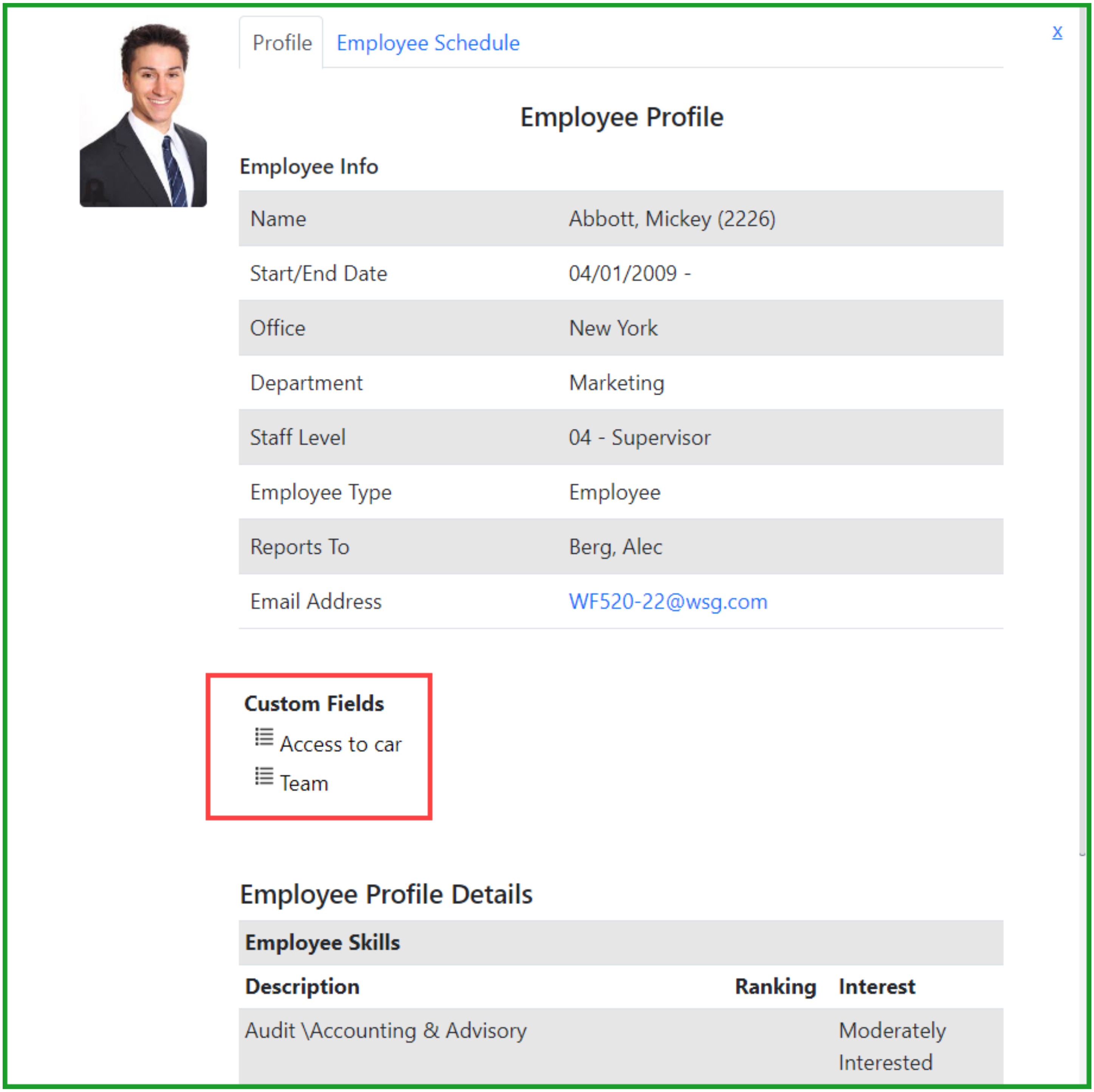


Figure 30 – Employee Profile and Custom Fields

Toggle Between Assignment Requirements and Edit Assignment

You can now toggle between assignment requirements and the assignment. From the Requirements page, click the Edit Assignment link:

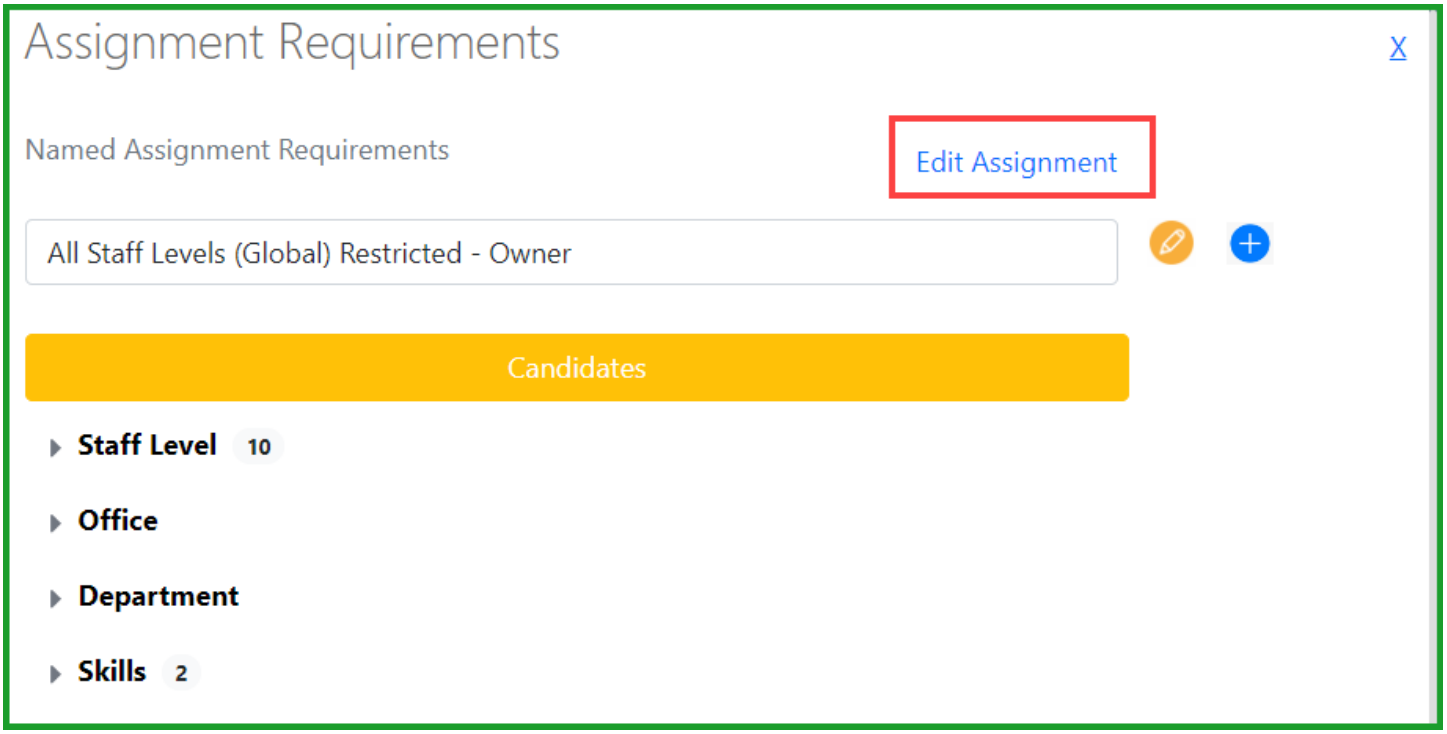


Figure 31 – Assignment Requirements/Edit Assignment Toggle

To toggle to the Assignment Requirements from the Edit Assignment page, click the Edit link:

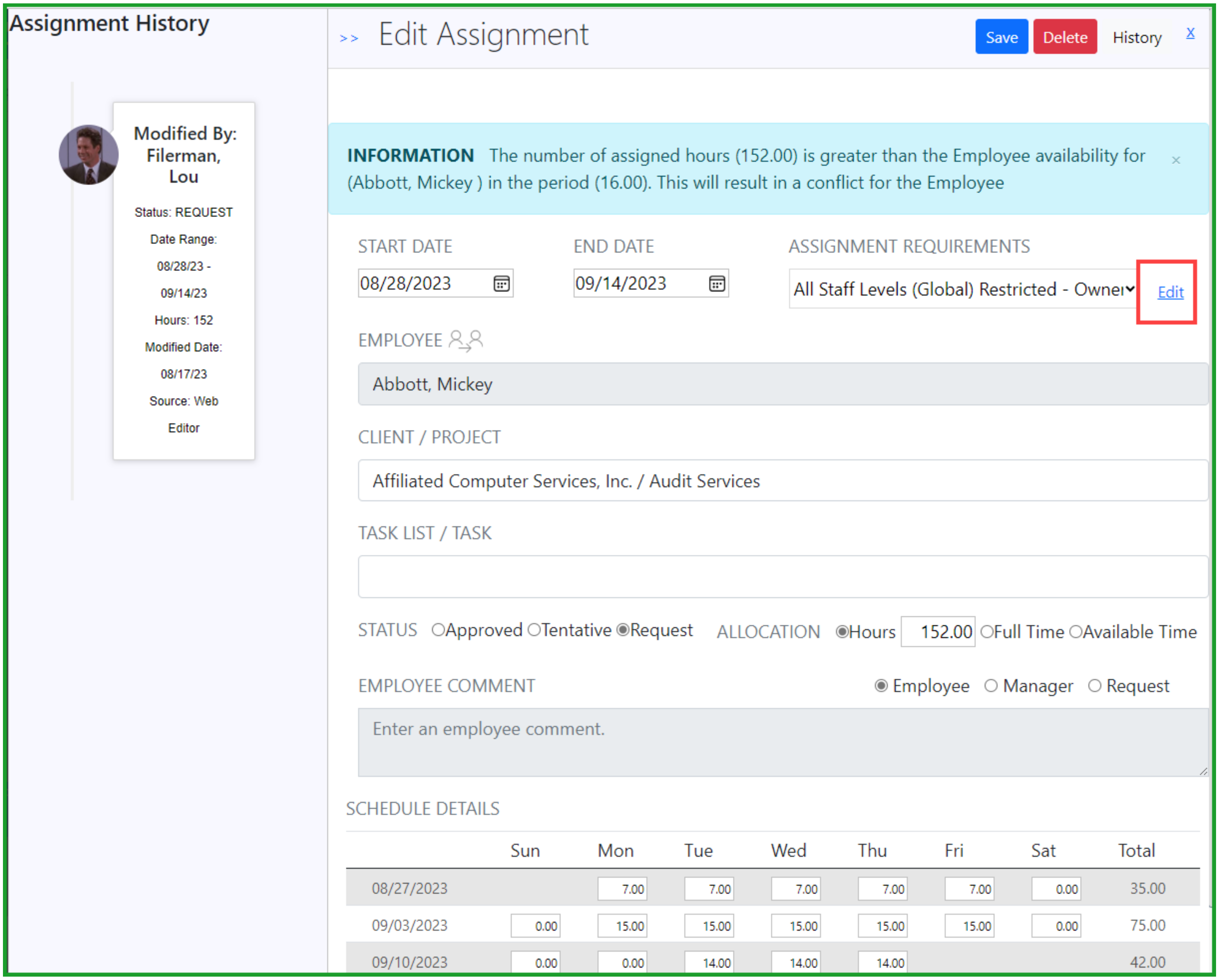


Figure 32 – Assignment Requirements Toggle

Performance Evaluations Enhancements

We've enhanced our Performance Evaluations functionality by adding a user configurable approval process, as well as adding support for importing Performance Evaluations criteria. Users with the appropriate security permission can define the Performance Evaluations approval process based on the evaluation type – annual, disciplinary, etc. – and assign reviewers and due dates:

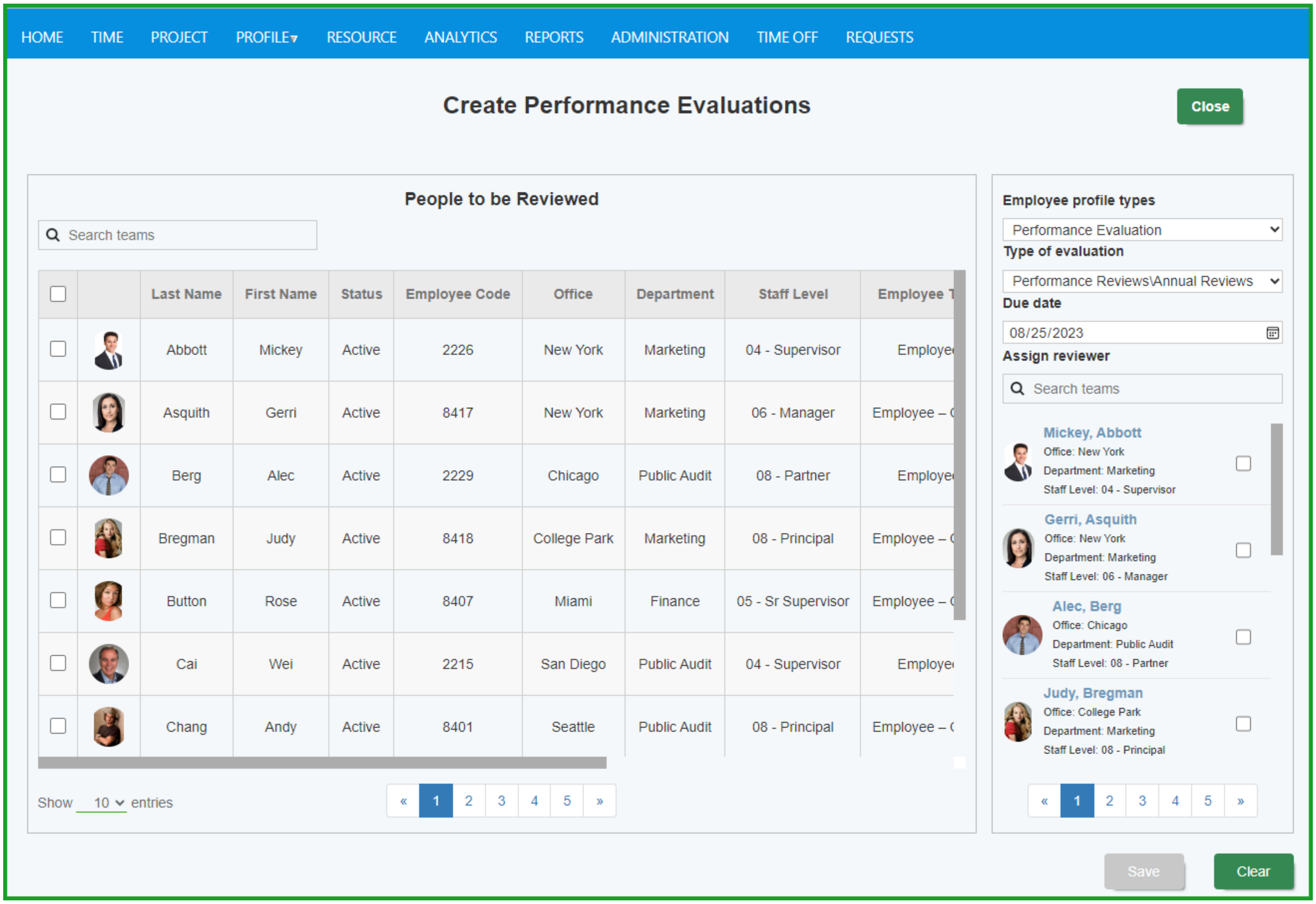


Figure 33 – Creating Performance Evaluations