EmpireSUITE
by wsg systems corp

WSG Systems Corp
630 9th Avenue,
Suite 301
New York, NY 10036

What's New in Empire SUITE January 2022?

Contents

What's New in Empire SUITE January 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

- Empire RESOURCE Analytics page project view
- Enhanced Empire RESOURCE and Analytics Employee Profile view
- Employee profile page address information
- Resource Assignment Excel-based Import
- Improved and reformatted Empire RESOURCE Excel exports
- New "Assignment – Employee Upcoming Schedule with Comments" Email
- Employee and Project/Employee specific rates
- New Company General Settings menu option
- New Approve Assignment permission
- New Review Opportunities permission
- Timesheet Status extract now includes timesheet status information from Terminated employees

Empire RESOURCE Analytics Page Project View

Users can now view and add assignments by project in addition to the existing assignment view by resource. From the Analytics page, click the Project Type radio button to toggle the display from Employee-based to Project-based:

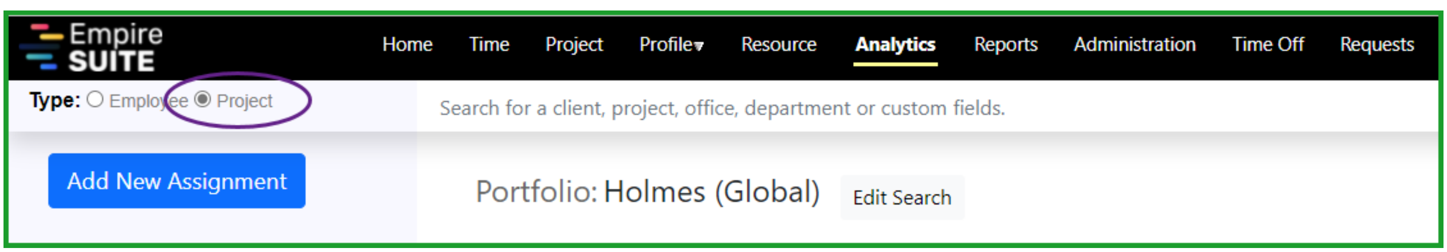


Figure 1 – Project View Toggle

The Project view supports user-defined project Portfolios which use similar type controls as the Teams feature in the Resource view. You can use the Custom Search button to search for projects by client, project name or code, office, department, status, or custom fields. You can save and edit your project Portfolio as you would a resource Team with any combination of the same Global, Criteria and Restricted attributes:

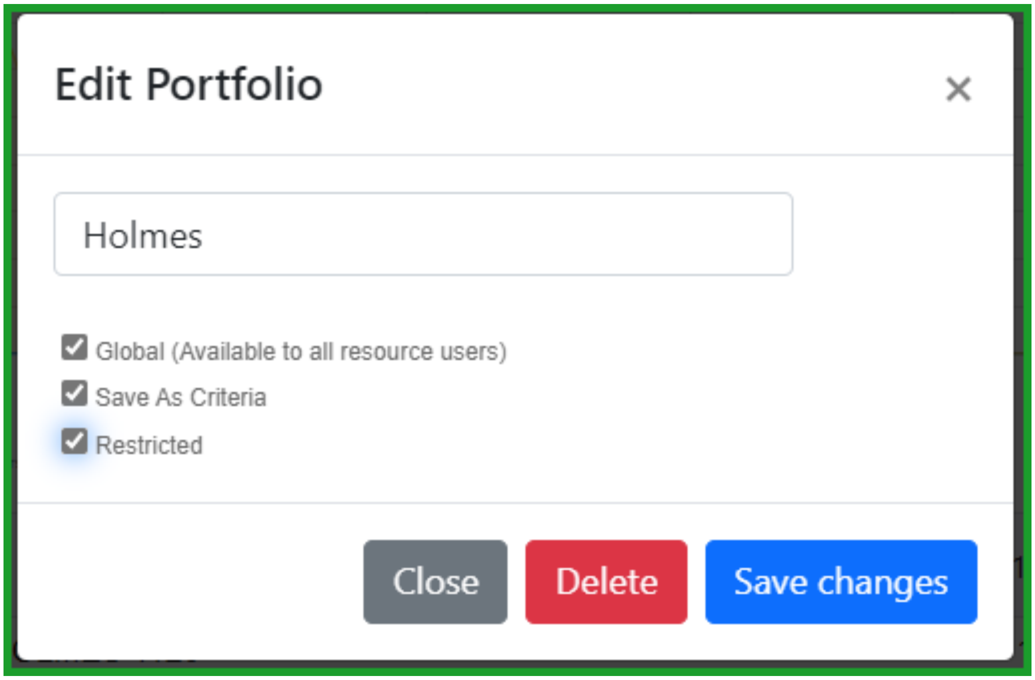


Figure 2 – Project Portfolio

In the screenshot above, we've created a 'Holmes' portfolio using the client 'Holmes Fans' as the criteria basis of the portfolio – that is, any project created for the client Holmes Fans will be automatically included in the Portfolio.

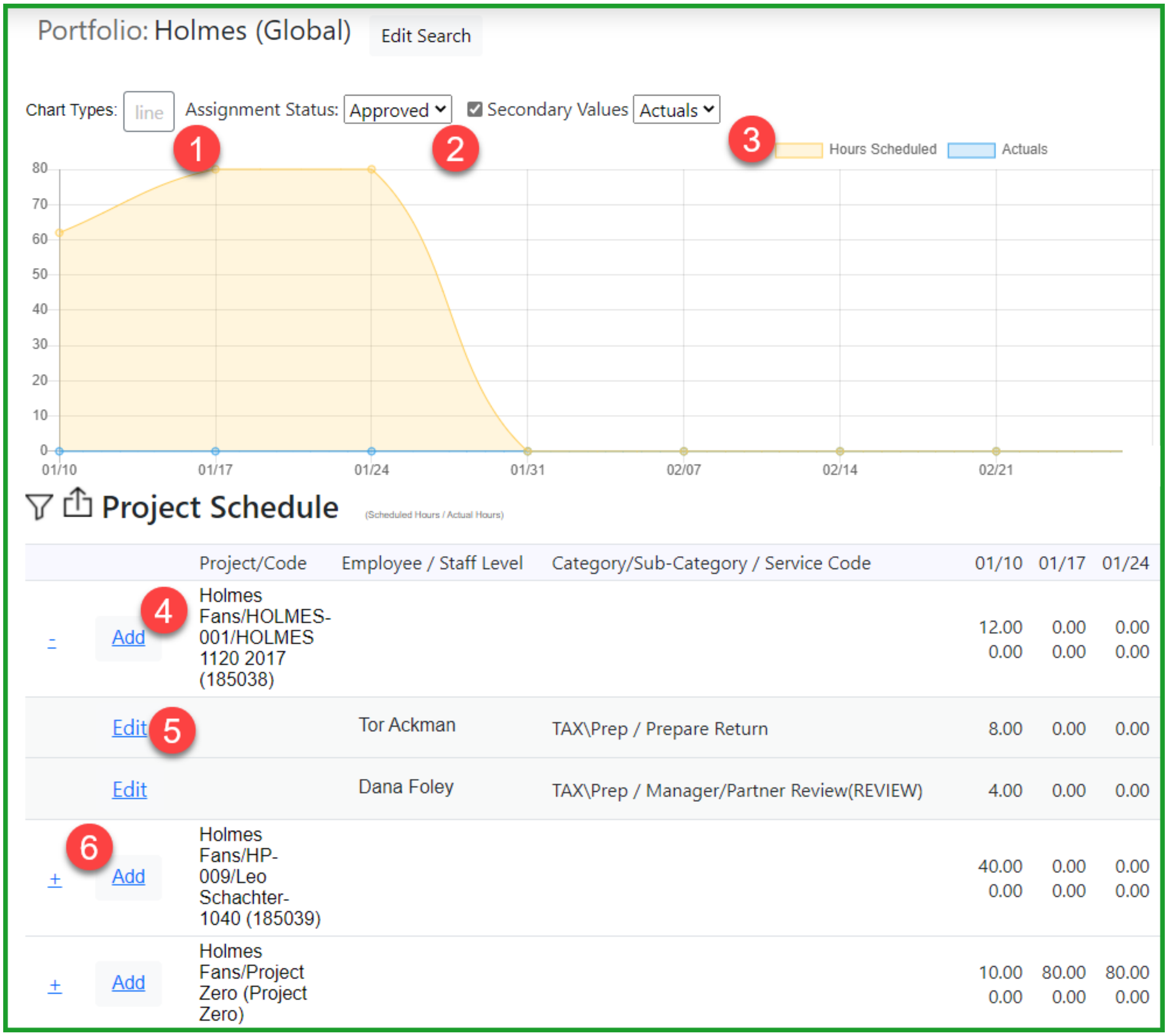


Figure 3 – Project View Analytics Page

A few things to note on the Analytics page Project View:

1. You can select from a variety of different chart types:
   a. None
   b. Line
   c. Bar
   d. Doughnut
   e. Pie
   f. Radar
   g. Map
2. You can display the results based on different Assignment Status selections
   a. All
   b. Approved
   c. Tentative

   d. Request
3. You can include Actuals as a Secondary Value in the display. If there are timesheet actuals for the projects in the portfolio, you'll see them in the chart in a different color
4. Click the Add link to open the Add New Assignment page
5. Click the Edit link to open the Edit Assignment page
6. Click the plus/minus link to expand or collapse the display to summarize the assignments or display the assignment details

Enhanced Empire RESOURCE and Analytics Employee Profile View

To see extensive details about a resource, click the resource picture in the Resource page. . .

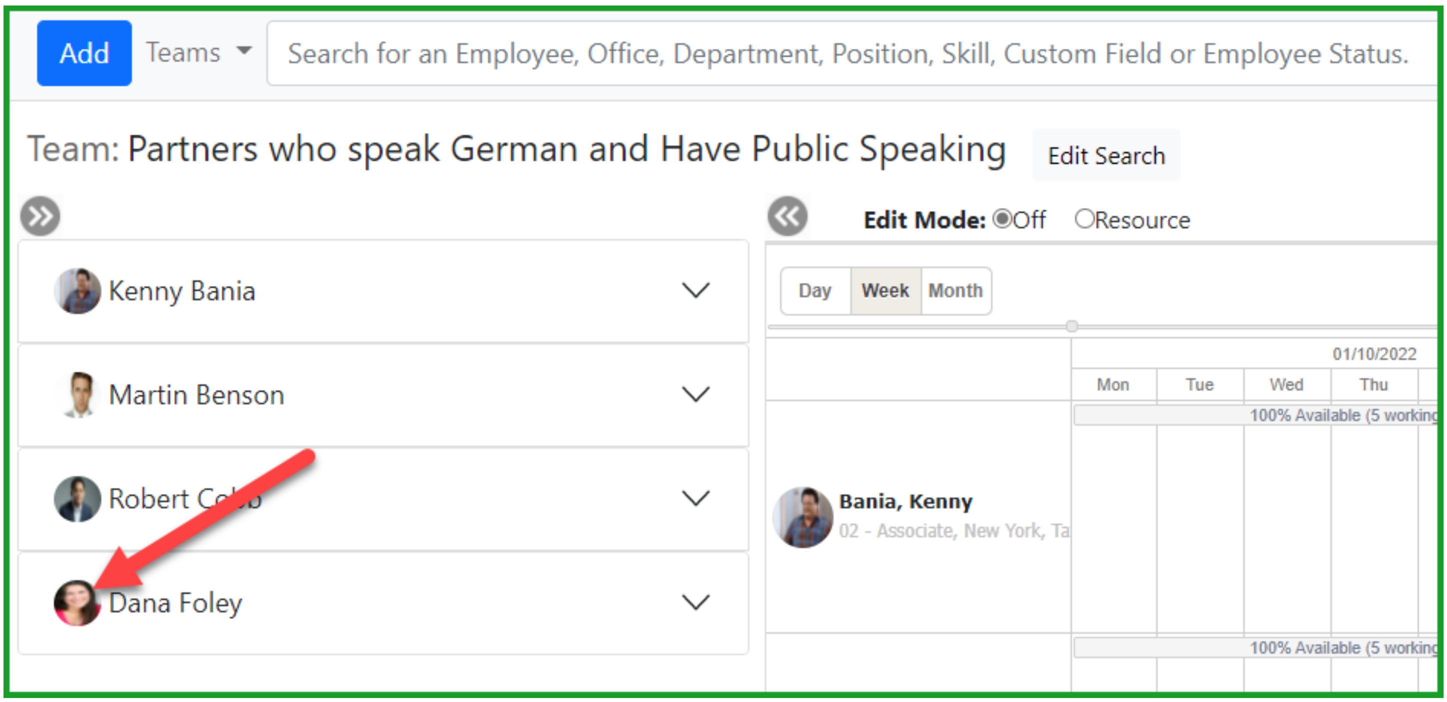


Figure 4 –Resource Profile

. . .and a complete Employee Profile page will launch to display basic information such as Office, Department and Staff Level information, as well as Skills and Custom Field information:

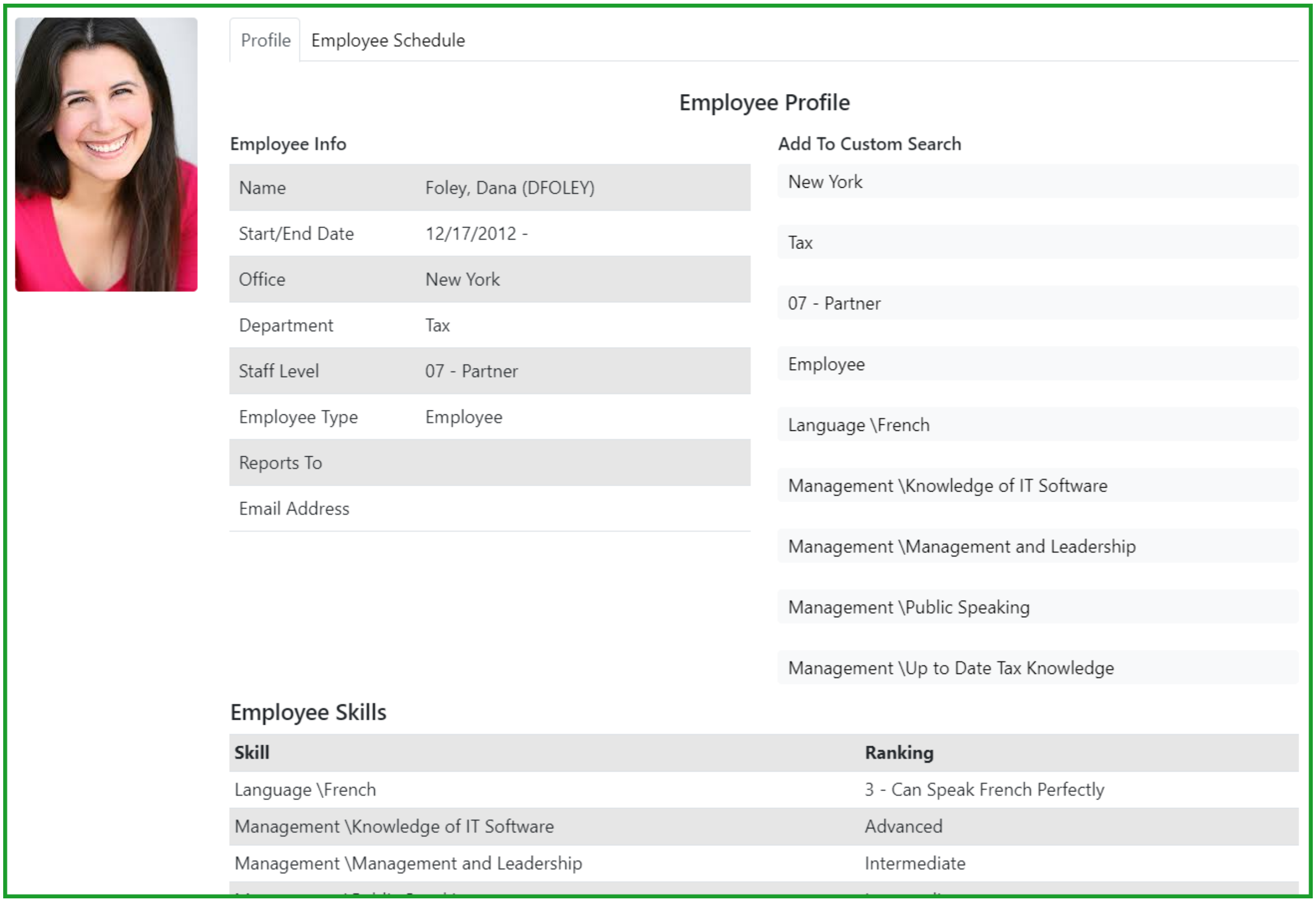


Figure 5 – Expanded Resource Profile Page

Employee Profile Page Address Information

We've added fields for employee address and phone information in the Employee Profile page. Click Edit Profile from the Profile option in the Main menu bar:

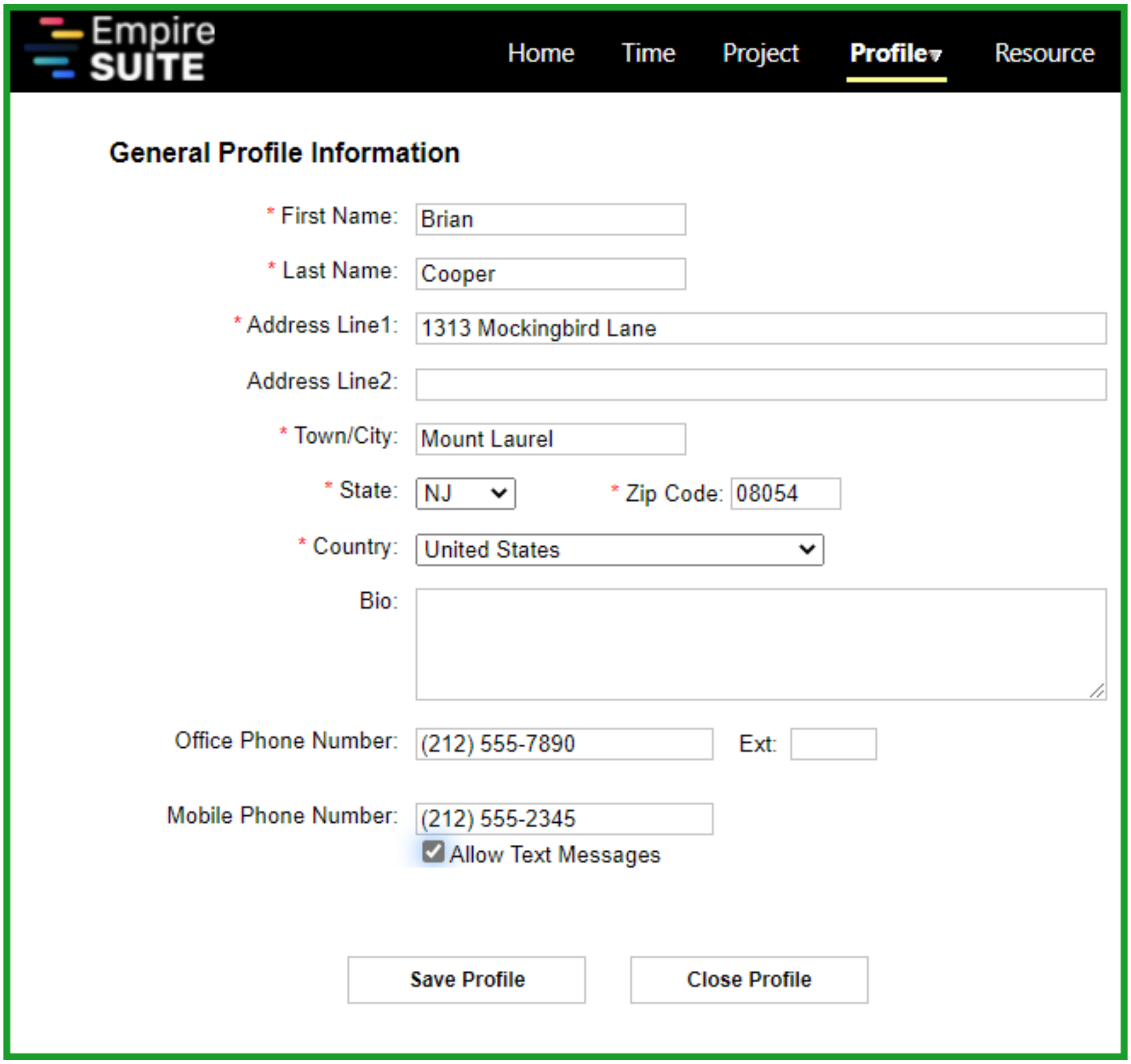


Figure 6 – Employee Address Information

Resource Assignment Excel-based Imports

If you are moving from another scheduling tool into Empire RESOURCE or have been using Excel to manage staff scheduling, you can use the Excel-based import to load assignments into Empire RESOURCE. From the Administration menu, select Loads/Integration, then select either Resource Assignment FTE load or Resource Assignment Hours Load as appropriate:

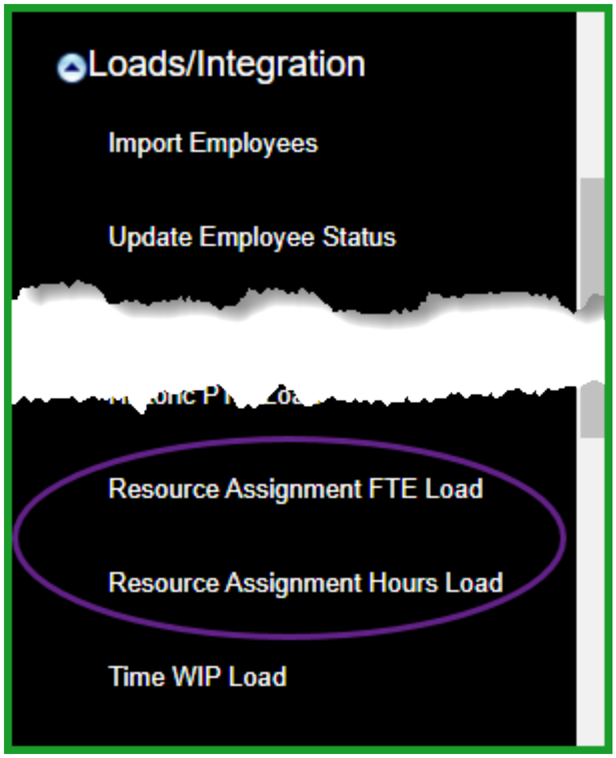


Figure 7 – Resource Assignment Load Options

As with the other imports, you can select a file from your library or download a template file from the Import page.

Improved and Reformatted Empire RESOURCE Excel Exports

We've added additional columns and reformatted the Excel Exports available from the Analytics page. Click the Export icon to launch the export:

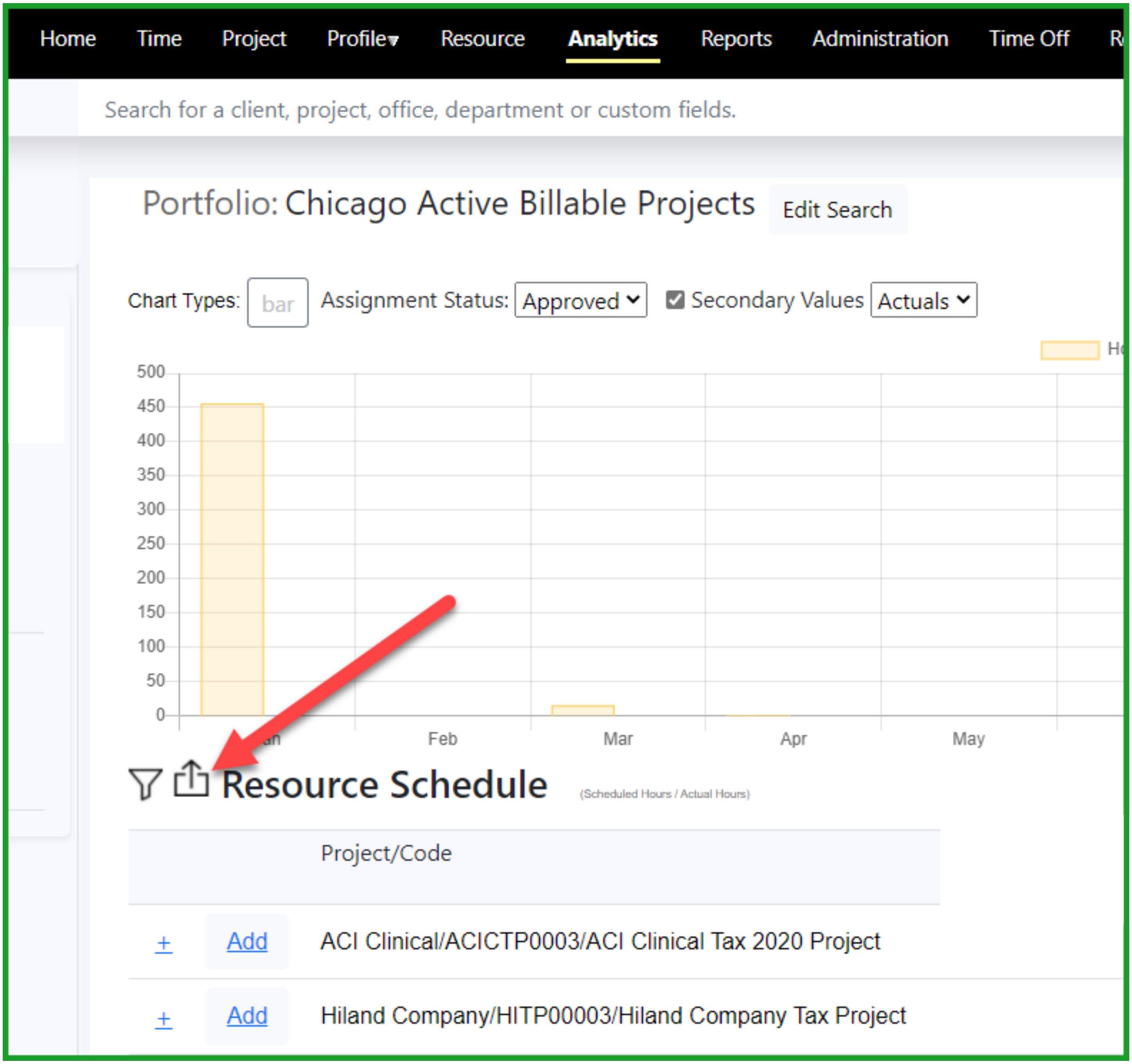


Figure 8 – Analytics Page Excel Export

The export results now include schedule and actuals information, as well as Task List/Task or Category/Sub-Category/Service code details:

	A	B	C	D	E	F	G
1				Project/Code	Employee / Position	Category/Sub-Category / Service Code	Jan
2				ACI Clinical/ACICTP0003/ACI Clinical Tax 2020 Project			368.00 Scheduled - Actuals 0.00
3					Harper Cornfield		4
4					Harper Cornfield		2
5					Ralph Crespo	TAX\Prep / Manager/Partner Review(REVIEW)	66
6					Carl Farbman	TAX\Prep / Manager/Partner Review(REVIEW)	66
7					Jake Jarmel	TAX\Prep / Manager/Partner Review(REVIEW)	66
8					Henrich Lounberg	TAX\Prep / Manager/Partner Review(REVIEW)	66
9					Sue Ellen Mischke		2
10					Sue Ellen Mischke	TAX\Prep / Manager/Partner Review(REVIEW)	66
11					Jackie Smith		8
12					03 - Sr Associate		20
13					06 - Senior Manager		2

Figure 9 – Excel Export Details

New “Assignment – Employee Upcoming Schedule with Comments” Email

We’ve added a new email type for our customers who want staffers and managers to see comments about upcoming assignments. The Assignment – Employee Upcoming Schedule with Comments email will include comments from Managers, Requesters or Employees on an upcoming assignment.

Email setup is in under the Administration menu in Company \ Email Setup

Employee and Project/Employee Specific Rates

Employee Specific Rates

To define a rate for an employee to use on all projects, select Employee \ Employee Rates from the Administration menu:

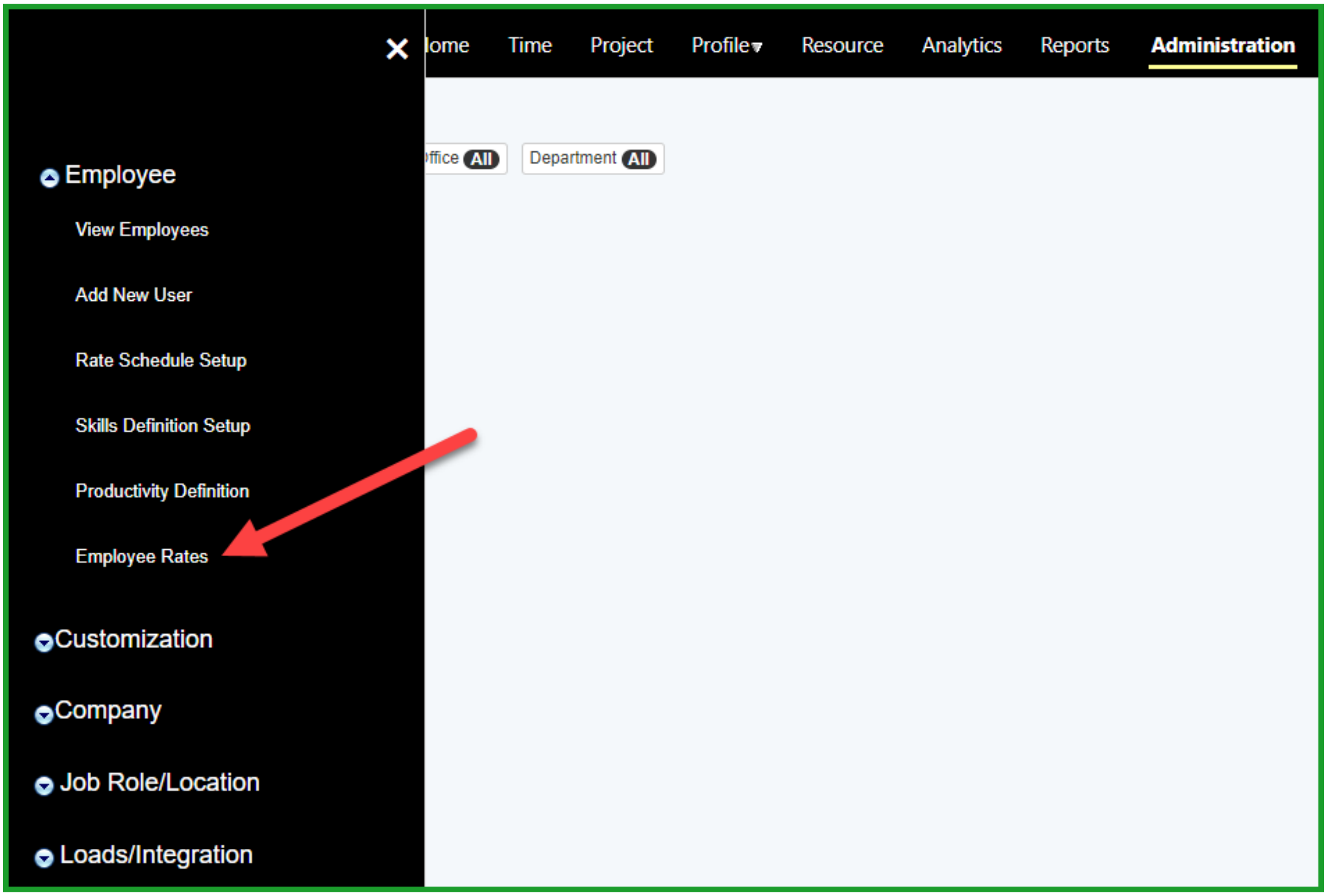


Figure 10 – Employee Rates Menu Option

Project/Employee Specific Rates

To define a rate for a specific employee on a specific project, select the desired project, then select Define Rates from the Project menu:

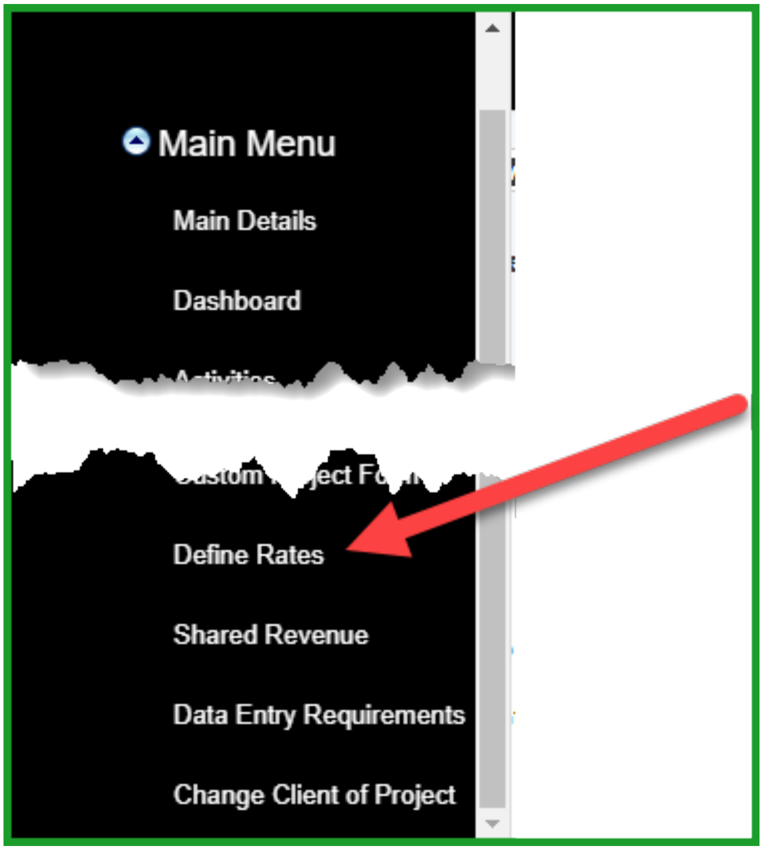
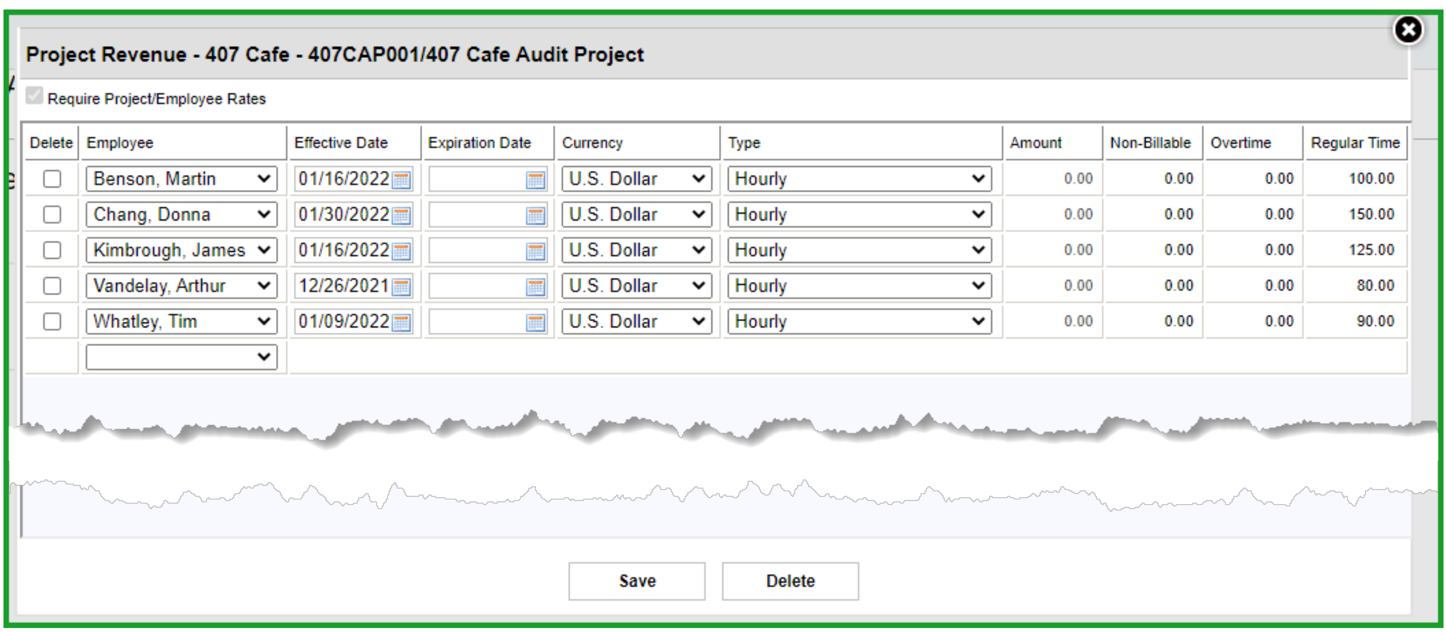


Figure 11 – Project Employee Specific Rates Menu Option

Select the appropriate employee from the drop-down list. . .



Project Revenue - 407 Cafe - 407CAP001/407 Cafe Audit Project

Require Project/Employee Rates

Delete	Employee	Effective Date	Expiration Date	Currency	Type	Amount	Non-Billable	Overtime	Regular Time
	Benson, Martin	01/16/2022		U.S. Dollar	Hourly	0.00	0.00	0.00	100.00
	Chang, Donna	01/30/2022		U.S. Dollar	Hourly	0.00	0.00	0.00	150.00
	Kimbrough, James	01/16/2022		U.S. Dollar	Hourly	0.00	0.00	0.00	125.00
	Vandelay, Arthur	12/26/2021		U.S. Dollar	Hourly	0.00	0.00	0.00	80.00
	Whatley, Tim	01/09/2022		U.S. Dollar	Hourly	0.00	0.00	0.00	90.00

Save Delete

Figure 12 – Project Employee Specific Rate configuration

. . .and add the Effective Date, Expiration Date, Type and amounts as desired. A few notes about Rate Types and configuring Employee and Project/Employee rates are found below in the Rate Types section.

Rate Types

Hourly rates are the default rate type. A few other things to note about configuring Employee and Project/Employee Rates:

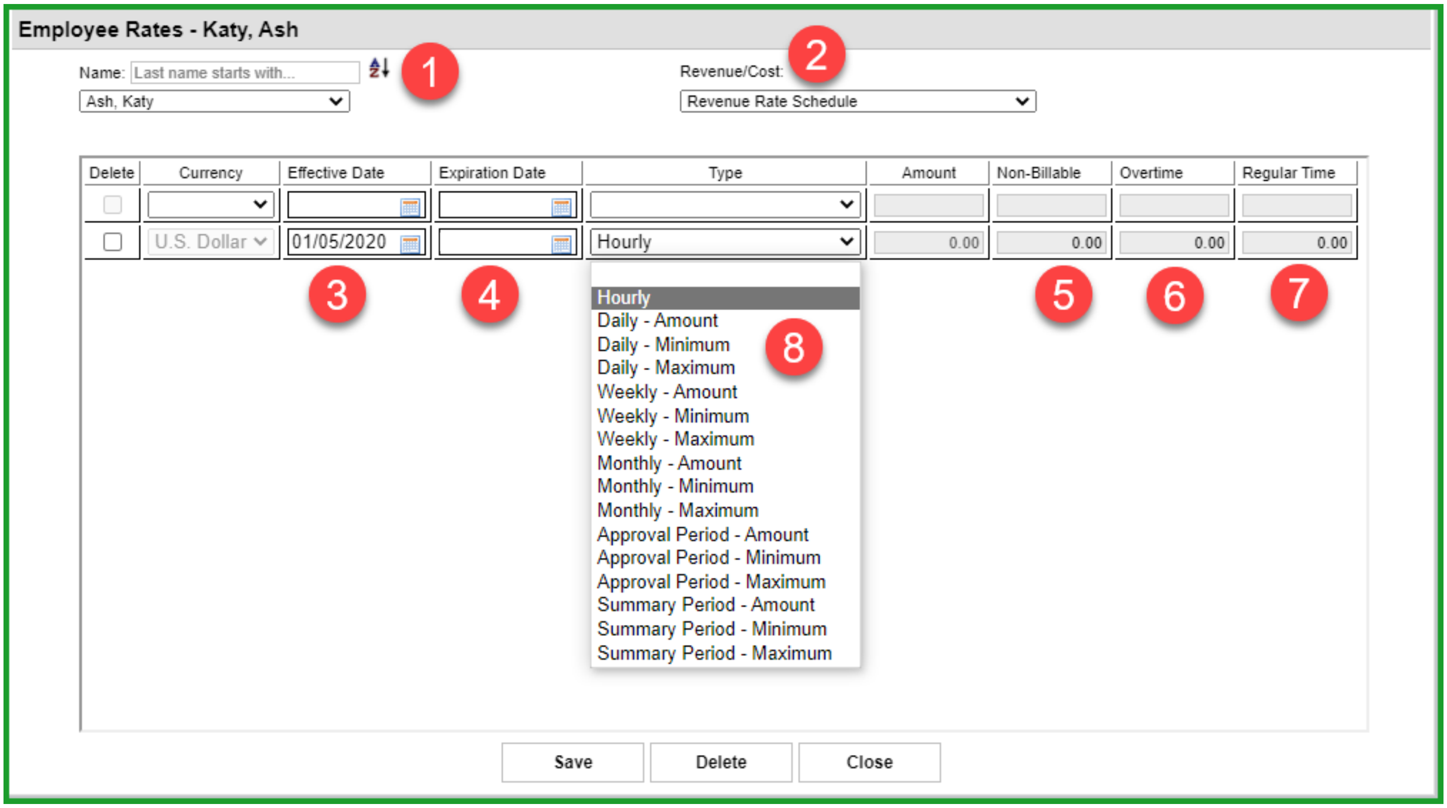


Figure 14 – Employee Rate Configuration

While the screenshot above is for Employee Rate setup, the same rules apply for Project/Employee rates:

1. Use the Last name starts with option to find the desired staffer, or use the drop-down list to pick from the list of employees
2. Use the drop-down list to select either Revenue or Cost rates
3. Enter a date or use the date control to select the rate effective date. Please note rates must start on the first day of a timesheet approval period, and if you select a date other than the first day of an approval period, the effective date will change automatically to the first day of the approval period which includes the selected date. In other words, if your timesheet approval periods start on Sunday and you select a Tuesday as the rate effective date, the application will change the rate to start on Sunday automatically
4. You can enter an expiration date, or leave the expiration date field empty if you would like the rate to be applied indefinitely. As with effective dates, if you enter an expiration date, the selected date must be the last day of an approval period or the application will change the date automatically to be the last day of an approval period
5. If applicable, enter a Non-Billable hourly rate
6. If applicable, enter an hourly Overtime rate
7. If applicable, enter an hourly Regular Time rate

8. If applicable, select the desired Rate Type. In addition to Hourly rates, you can also define rates by day, week and month. ***Please note Rate Types such as Daily Amount, Daily Minimum, etc., apply only to Revenue rates. Only the Hourly Rate type is available for Cost rates.*** In all cases, differences between the Amount specified and an extended amount based on the hours worked for the selected period and the regular time hourly rate will be captured as an Unplanned adjustment. To illustrate what we mean by Daily Amount, Daily Minimum and Daily Maximum, consider the following example where the hourly revenue rate for a resource is $150 per hour and the defined value for each daily type is $1,000:
    a. Amount – Regardless of the hours recorded for the selected period, the total revenue or cost for the period will be the defined amount. If the resource worked 8 hours, the revenue for the day will be $1,000 and $200 will be written off as an unplanned adjustment. If the resource worked 6 hours, an additional $100 write up will be applied so the daily amount is $1,000
    b. Minimum – Approved time of any amount will generate $1,000 in revenue for the day
    c. Maximum – Irrespective of the total hours approved, the maximum amount of revenue recorded for the day will be $1,000

New Company Menu Item – General Options

The options associated with the Tenant Owner – Time and Expense Approvals, Time and Expense Corrections, Rate Types and Self Schedule Default Status – have been moved to a separate menu option, available from Administration \ Company \ General Options:

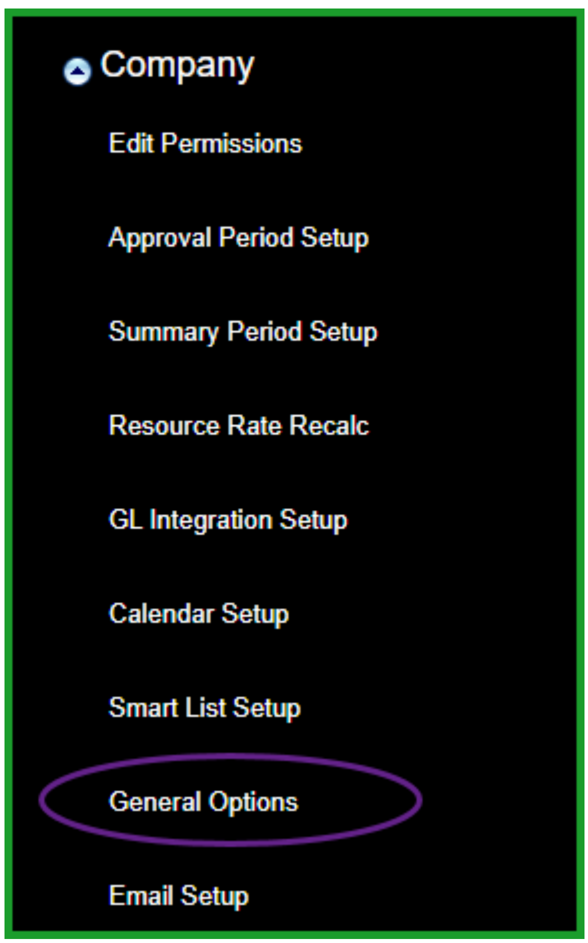


Figure 15 – General Options

Here's a screenshot of the General Options page:

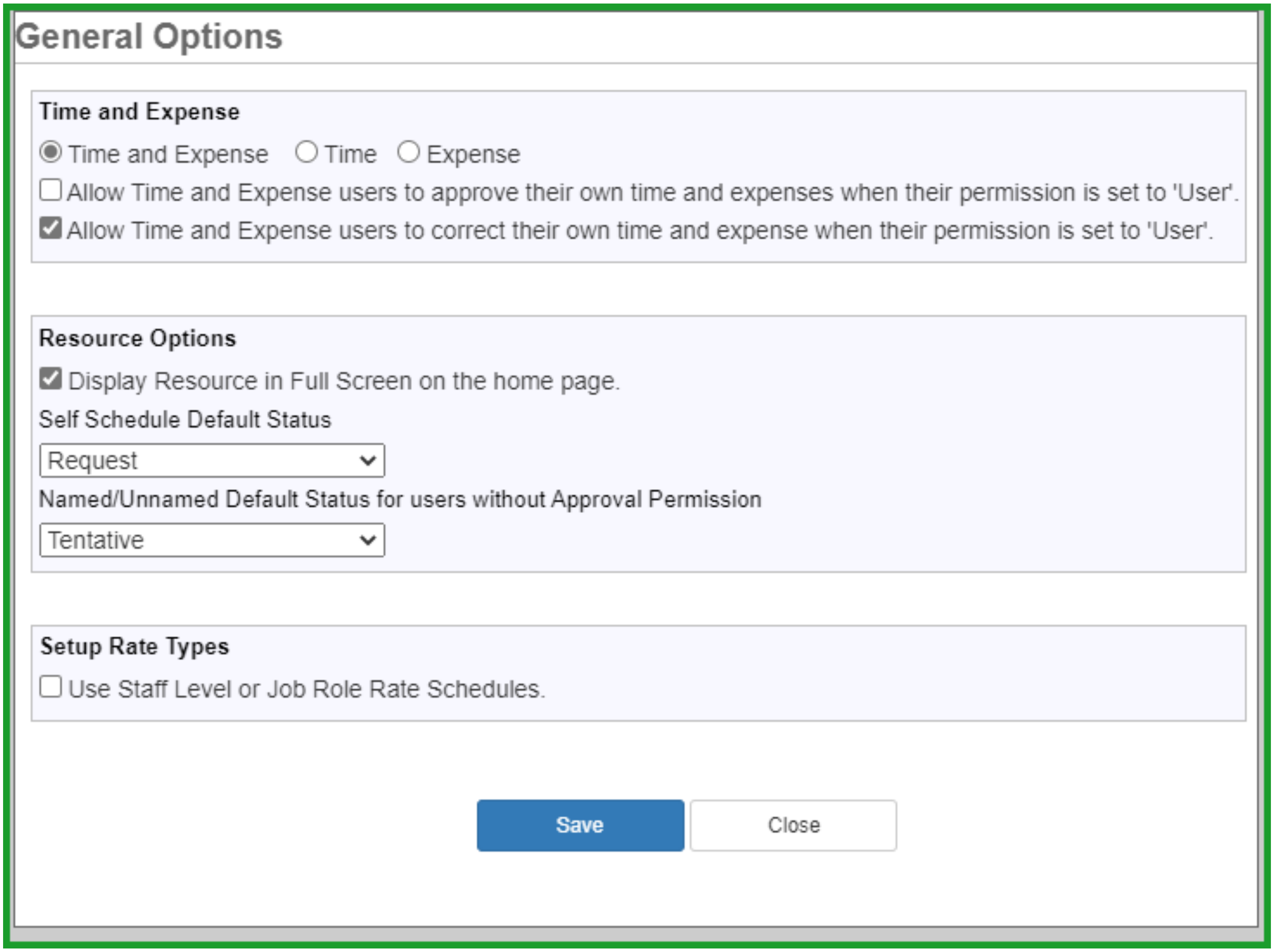


Figure 16 – General Options Controls

New Approve All Resource Assignments Permission

We've added a new permission called 'Approve All Resource Assignments' to address instances where firms want to allow self scheduling and manager created requests and tentative assignments, but want to reserve the ability to approve assignments to an administrator or a scheduling manager.

This new permission works in concert with the existing Add, Modify and Delete assignment permissions for self-scheduling, named and unnamed resources.

Additional information on the new permission and how it interacts with other permissions, the resource options defaults shown in the General Options Controls screenshot above and other system features is provided below:

Add New Assignment/Edit Assignment Page

If a user's Security Role is configured as below. . .

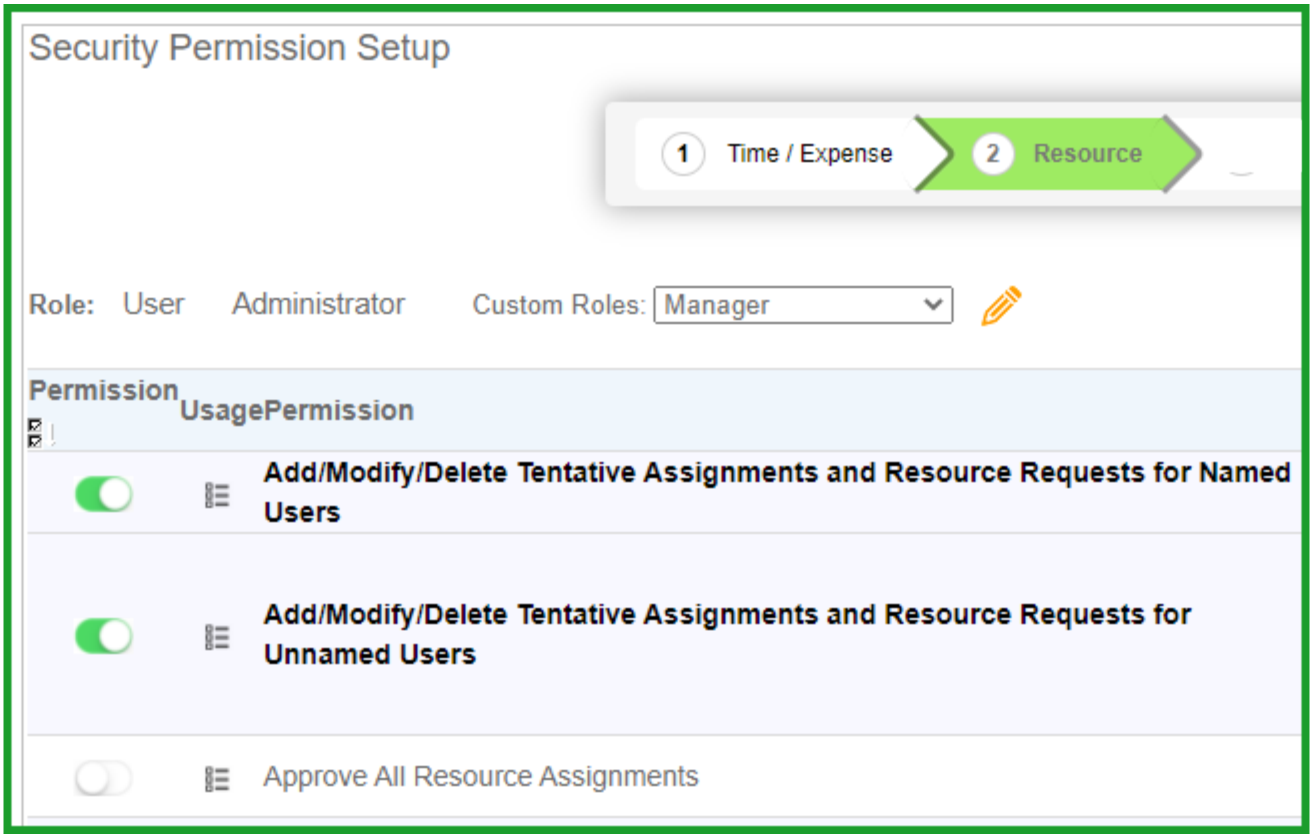


Figure 17 – Resource Security Permissions

. . . and the Resource Options default status is set as below. . .

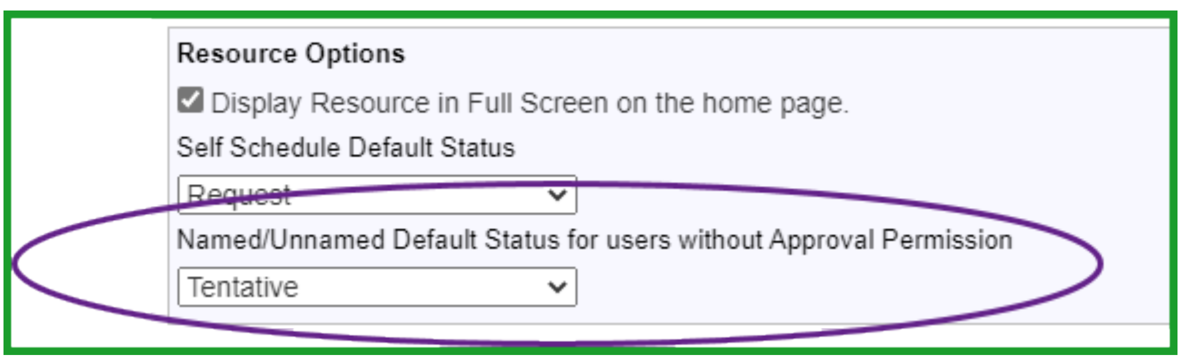


Figure 18 – General Options Resource Assignment Defaults

. . . the available assignment statues in the Add New Assignment and Edit Assignment pages will be limited to Tentative only:

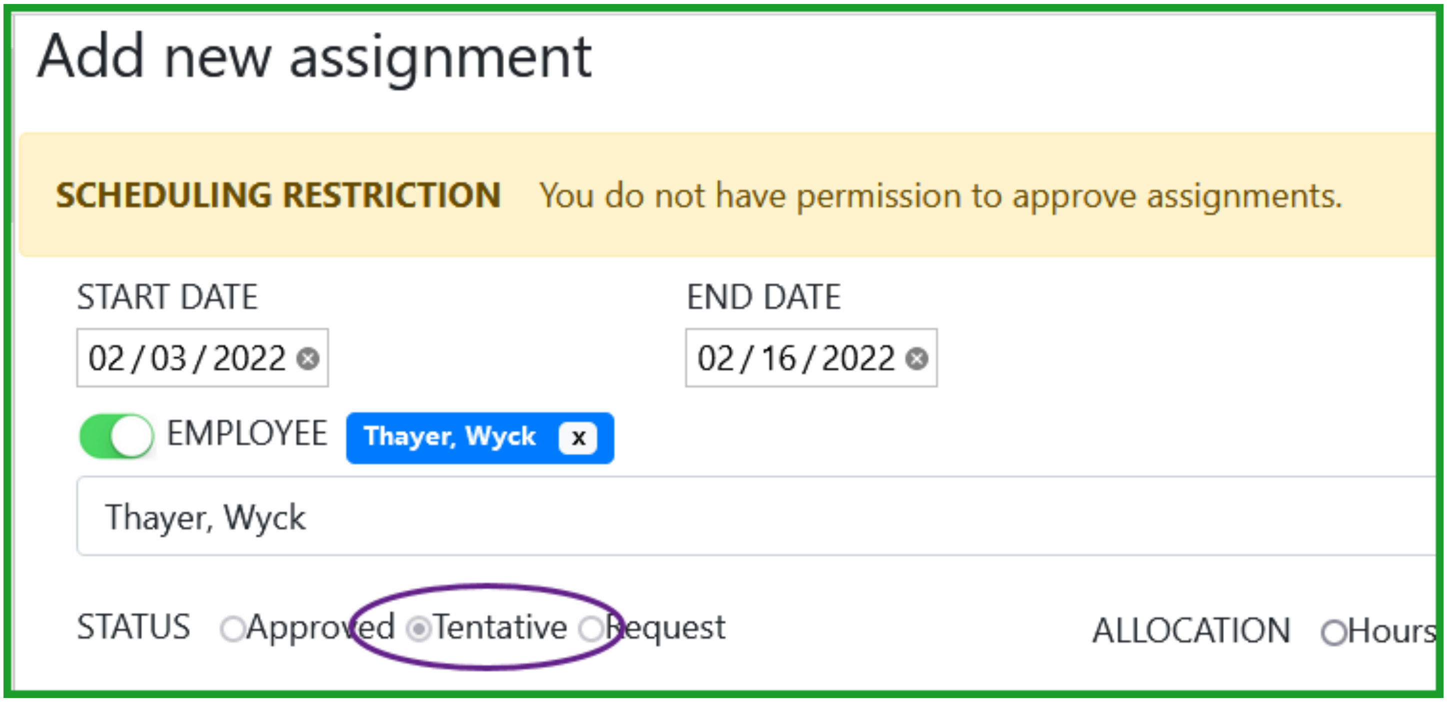


Figure 19 – Add New Assignment Limits

For this user, the same rules apply to creating assignments for unnamed resources – the user would be limited to creating Tentative assignments.

Users with the Approve All Resource Assignments permission. . .

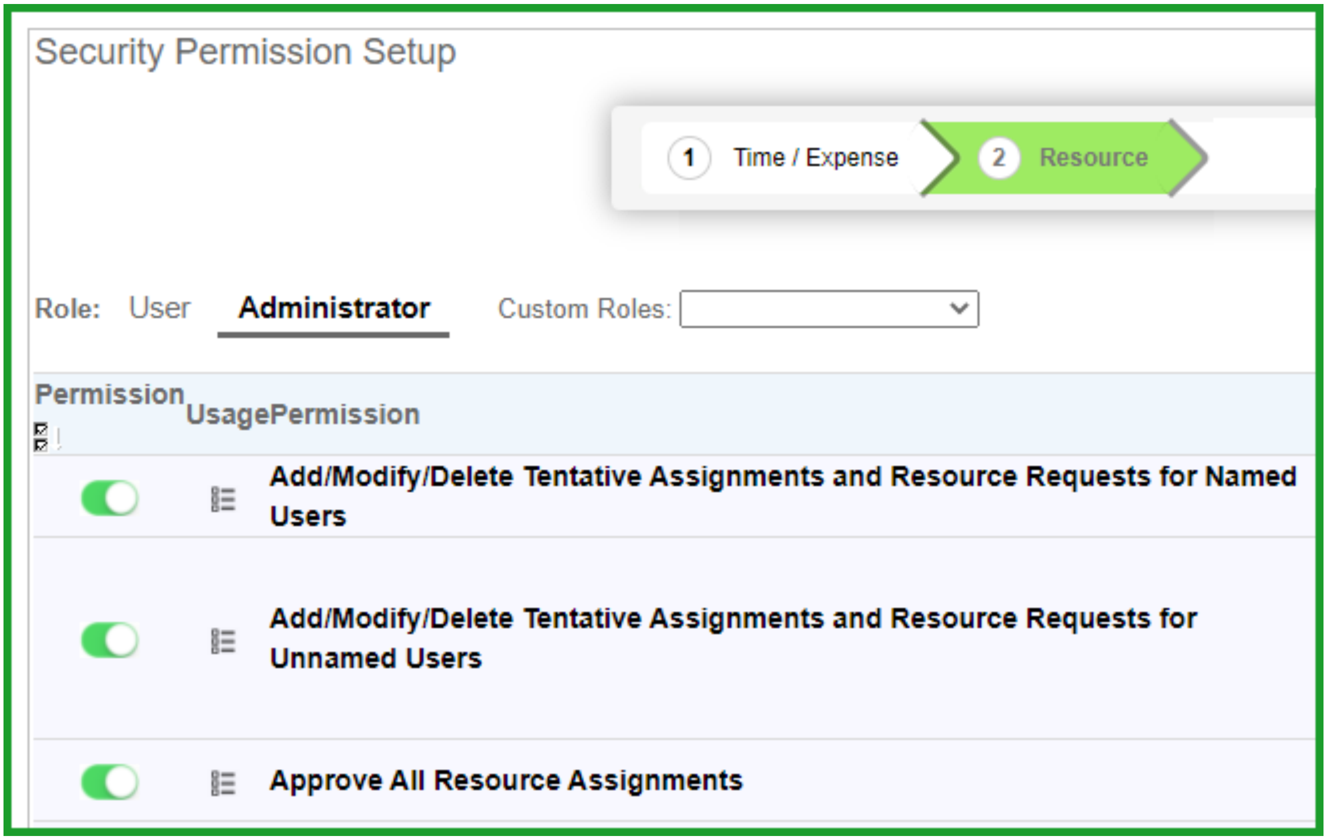


Figure 20 – Approve All Resource Assignments Permission

. . . can create Approved or Tentative assignments, as well as requests:

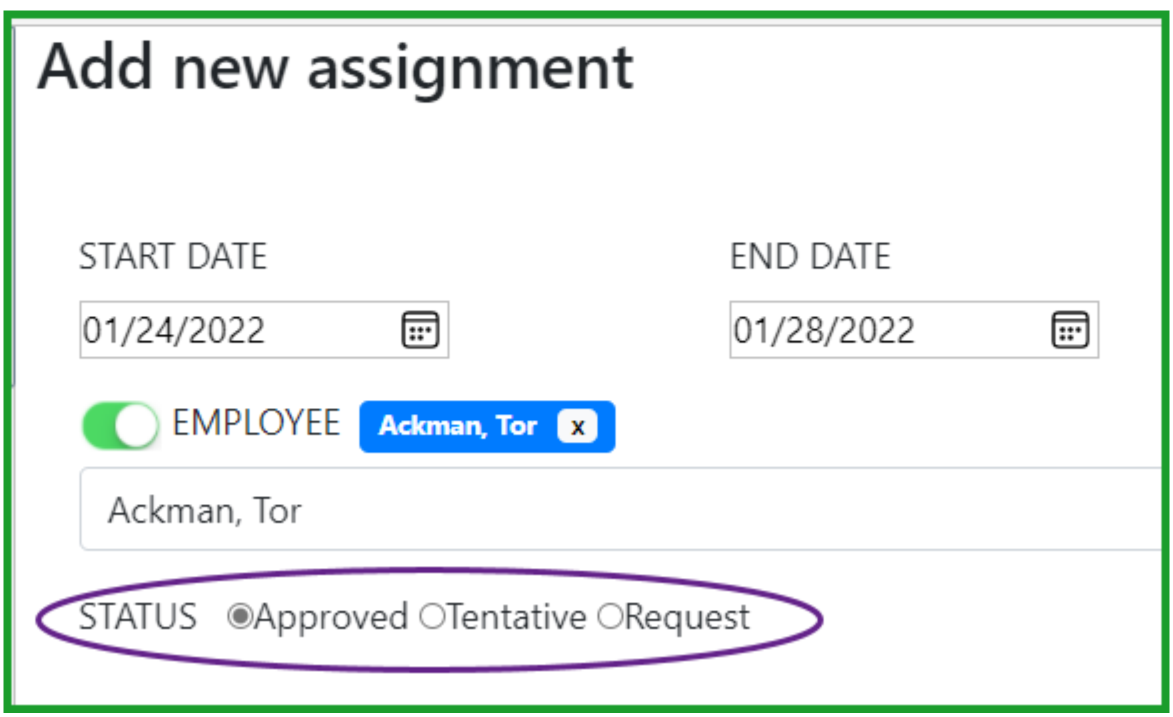


Figure 21 – Add New Assignment – All statuses

A couple of other items to note:

- When dragging or extending an assignment for either named or unnamed users, users without the Approve All Resource Assignments permission will have the assignment saved in the status set by the default self-scheduling permission setup in General Options. If they have the approval permission then we will leave the assignment status as is.

New Review Opportunities Permission

We've added a new Review Opportunities permission in conjunction with the new Approve All Resource Assignments permission to give users more options for viewing and managing requests and opportunities.

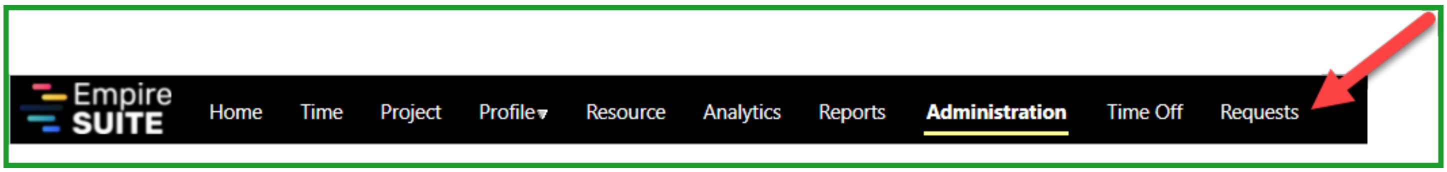


Figure 22 – Requests Menu Option

The Requests menu item is associated with two permissions:

- Review Opportunities
- Add/Modify/Delete Tentative Assignments and Resource Requests for Named Users

If the user has either one of the above two permissions in their Resource security role, the Requests menu option is enabled.

Requests Page Behavior Changes

We have also modified the Requests page behavior to better conform with the new Approve All Resource Assignments and Review Opportunities permissions.

- If the administrator has set the General Options page Resource Options for Named/Unnamed resources to 'All Statuses Available' or if the user has the 'Approve All Resource Assignments' permission, then the user will be able to use any of the status radio buttons. The user can select any assignment, request or opportunity, regardless of status. The user will be able to approve, change an assignment to Tentative or Request status, as well as reject modifications made by another user. The 'Select All' button will also be available as well which will allow the user to approve all selected items in a single save.
- Users with the Add/Modify/Delete Tentative Assignments and Resource Requests for Named Users permission alone also gives them the ability to manage the opportunity view
- Users with the following configuration will be able to launch the Requests page, but will be limited to Opportunities only. These users can set their filters (staff levels, offices, etc.) and can Apply or Unapply for the displayed assignments, but will not be able to drill down into Best Matches or see other users who have applied for the same assignment:
  - Review Opportunities permission enabled
  - Add/Modify/Delete Tentative Assignments and Resource Requests for Named Users permission disabled

  - The Resource Option in the General Option page for 'Named/Unnamed Default for users without the Approve All Resource Assignments permission is not set to us is not 'All Statuses' but they do have the 'Review Opportunities' permission they will have access to an opportunity only view.

If you have questions about your specific requirements and how the various options should be configured to best match your needs, please contact your WSG Support resource.

Timesheet Status Extract Now Includes Missing Timesheets from Terminated Employees

The Timesheet Status Extract, available in Administration \ Loads/Integrations, provides an Excel-based spreadsheet with Timesheet status results based on user-selectable criteria for:

- Timesheet Status
  - Not Yet Active
  - Active
  - Submitted
  - Approved
  - Rejected
- Employee Type
- Approval Period Range

The extract now includes timesheets from all employees, regardless of employee status, during the selected approval period range.