What's New in Empire SUITE October 2021?

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

- Saved Criteria Searches in Empire RESOURCE
- Employee Status and Skills are now Custom Search attributes
- Microsoft Teams Empire SUITE Bot for time off management
- Excel-based imports for updating employee status and Reports To managers
- Team names can be edited in the All Teams page
- New 'View Others' permission for the My Schedule portal
- Current Period v Last Unfinished Period Timesheet entry option
- Future Exception Time events now available in Empire RESOURCE
- Updated Tenant Owner page
- Requests and Opportunities View
- Post Time from the Resource Page

Empire RESOURCE Saved Teams with Saved Criteria Searches

Users with the appropriate security permission can now create and save Teams while using either the Resource or Analytics views, and can also save teams using saved criteria searches. For example, you can create an 'Active Chicago Tax' team using the 'Active' employee, 'Chicago' office and 'Tax' department filters:
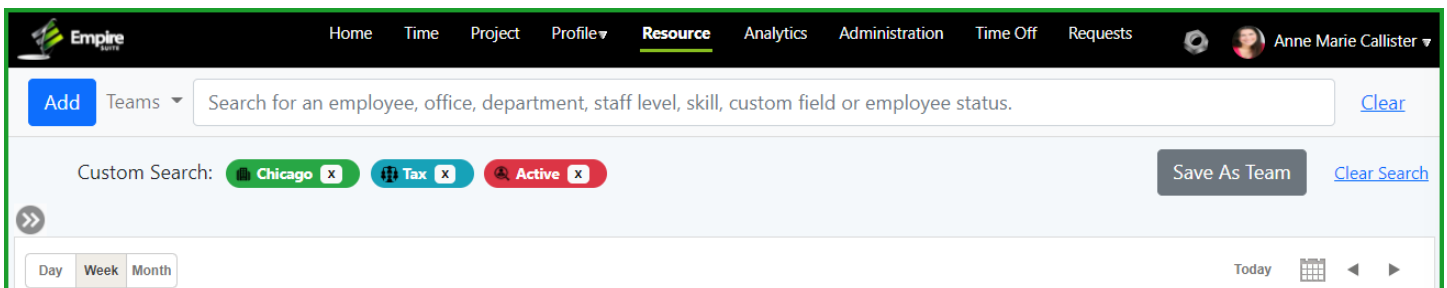

Figure 1 – Saving Teams from Resource View

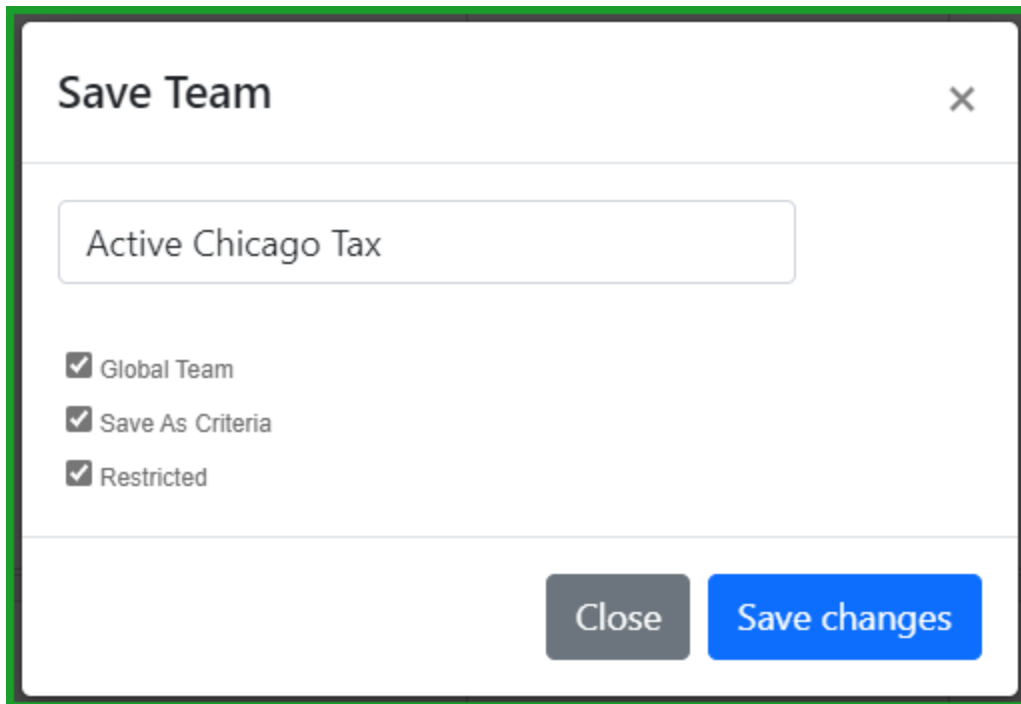When you have the desired search criteria selected, click the **Save as Team** button

Figure 2 – Save Team

When saving a team from the Custom Search feature, you have a few options to select from:

- Global Team – if you enable Global Team, any user with the View Global Team permission can select the team into the Resource or Analytics page view
- Save as Criteria – If Save as Criteria is enabled, any new active resource assigned to the Chicago Tax department will be automatically added to the team. This eliminates the need to repeat the same search to ensure new team members are included in the view.
- Restricted - You can also set the results returned from a Saved Criteria search to be 'Restricted' – this will prevent anyone except the owner from modifying the saved criteria used in the search

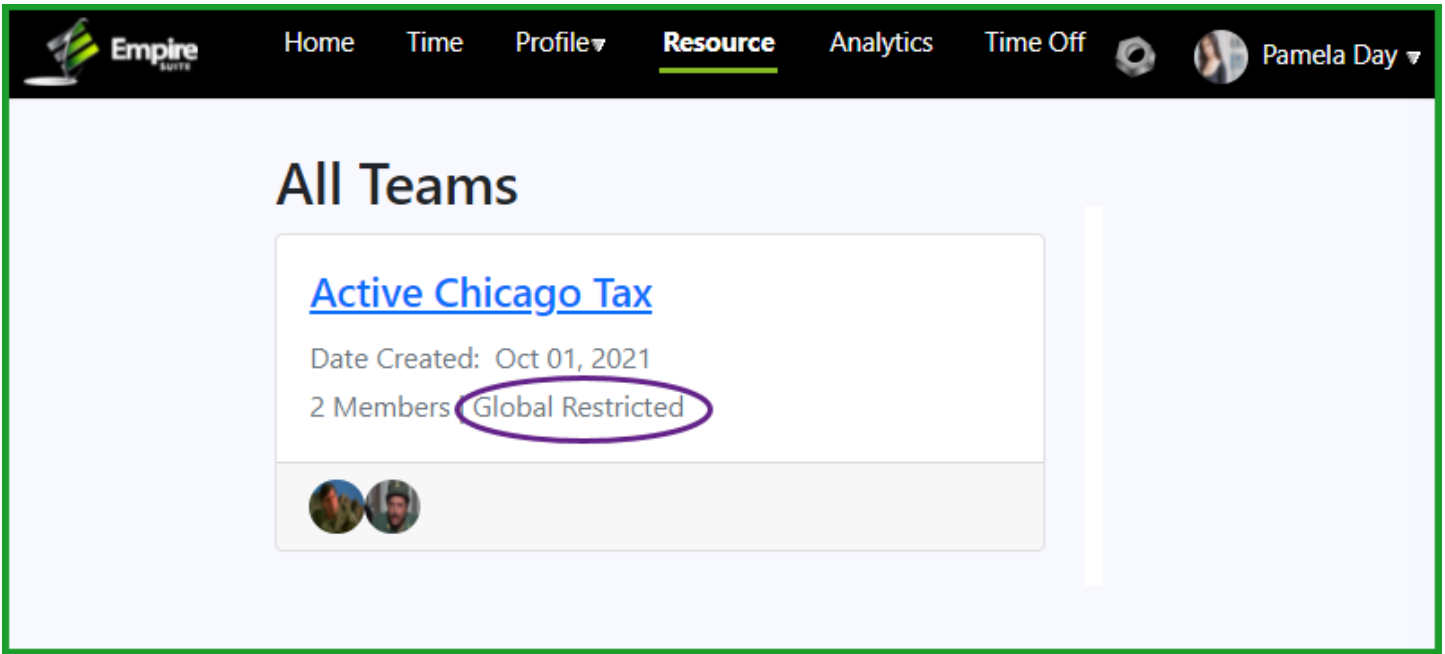As configured above, other users can view the Active Chicago Tax team in Resource or Analytics. . .

Figure 3 – Restricted Teams

. . .but other users cannot make any changes to the team. Note the user can click the **Edit Team** button. . .
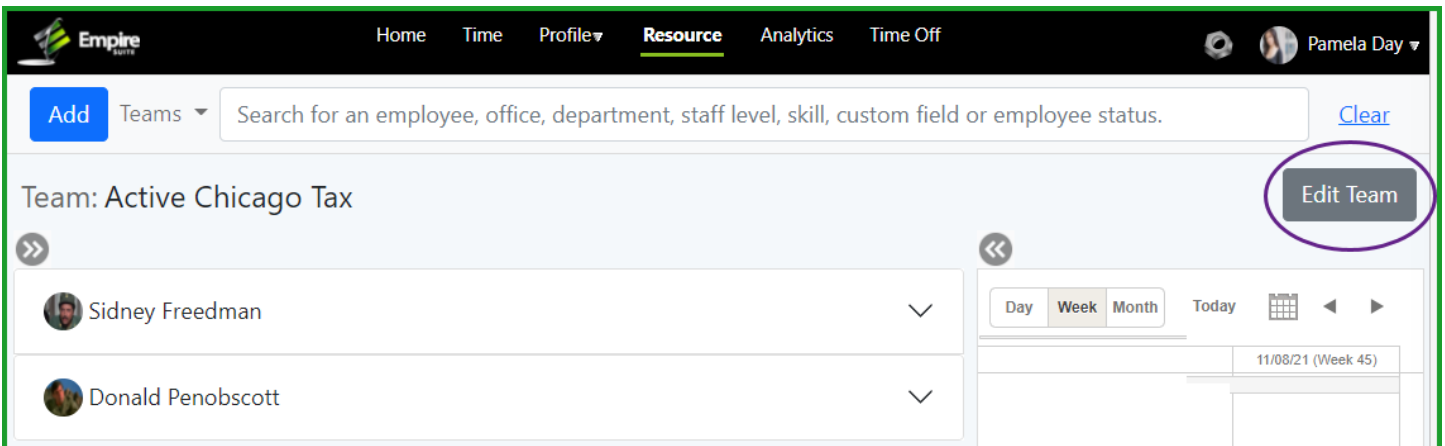

Figure 4 – Restricted Team View

. . .but other users cannot make any changes to the team as all of the available controls are locked:
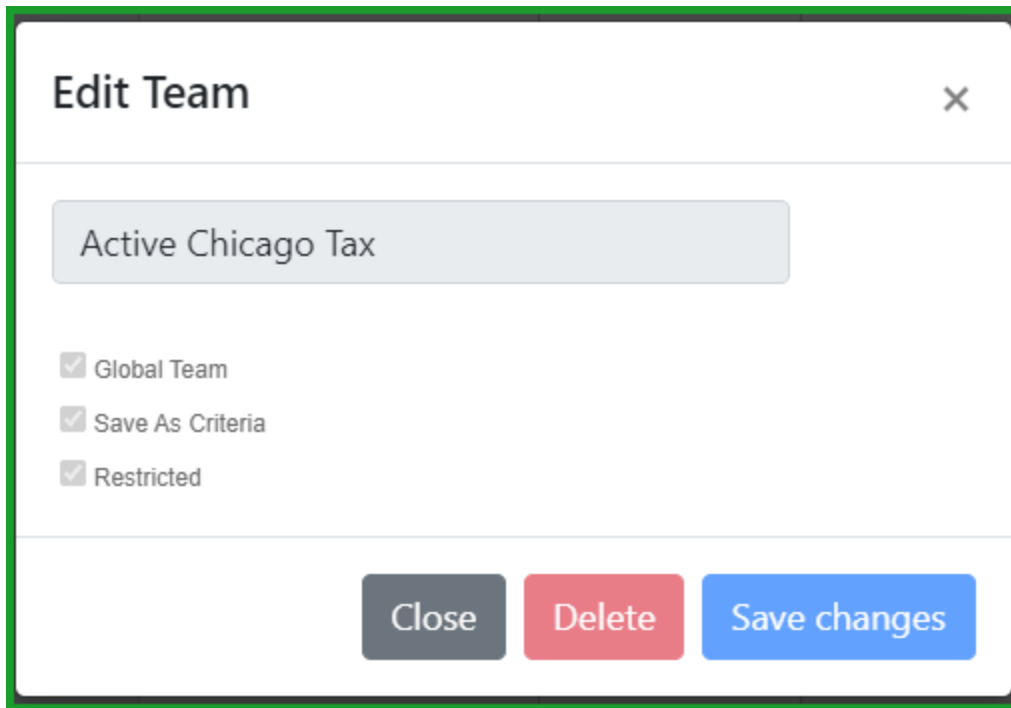
Figure 5 – Editing Restricted Teams

Employee Status and Skills are now Empire RESOURCE Custom Search attributes

In addition to employee name, office, department and staff level, you can now add Employee Status to the searchable attributes in the Empire RESOURCE Custom Search field. Simply add 'Active' to your list to limit the search results to only Active employees:
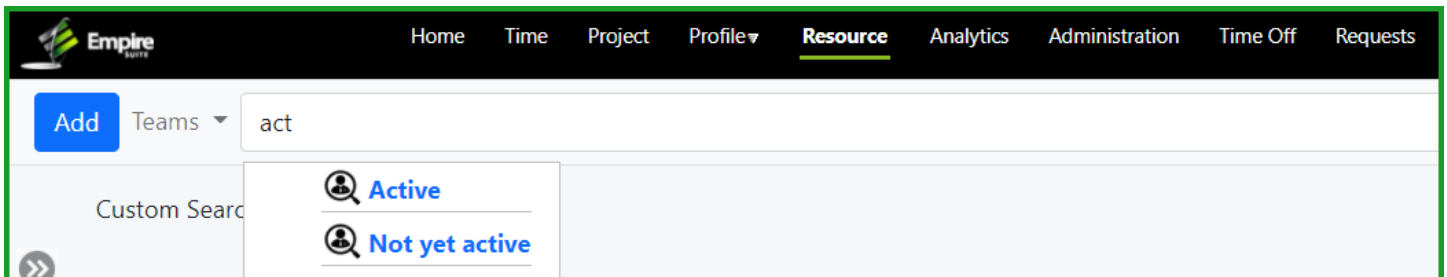

Figure 6 – Custom Search Employee Status

You can search for resources by Skills also. For example, if you need a list of resources who have defined skills in preparing 1040 or 1120 tax returns, you can search for them by skill category (Tax Preparation) or specific skill set (1040 or 1120):
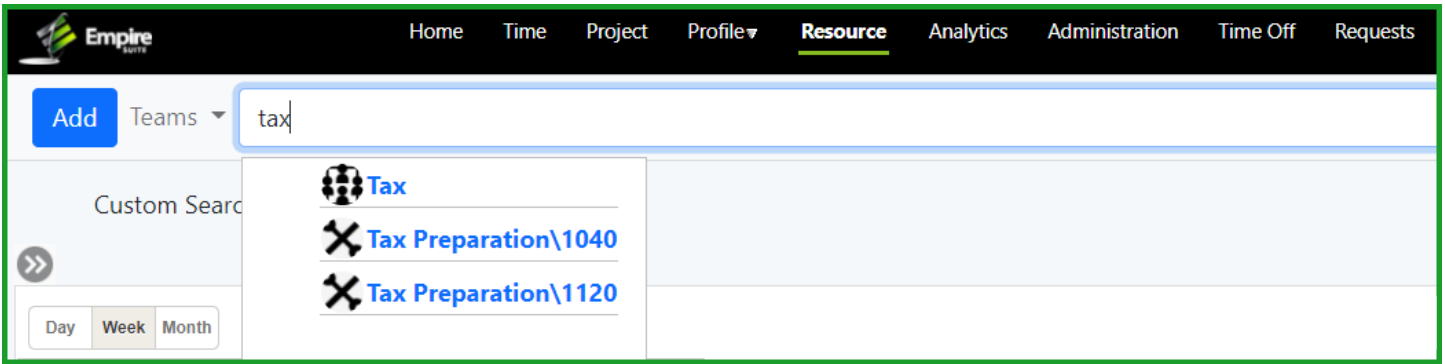
Figure 7 – Custom Search by Skills

Microsoft Teams Empire SUITE Bot

We've added a Microsoft Teams bot to give resources and managers yet another way to request and manage time off. In addition to a PTO request form, the Microsoft Teams Empire SUITE bot recognizes time off related short phrases such as 'I want to take vacation next week' or 'I need to take a day off tomorrow' added as chat messages.
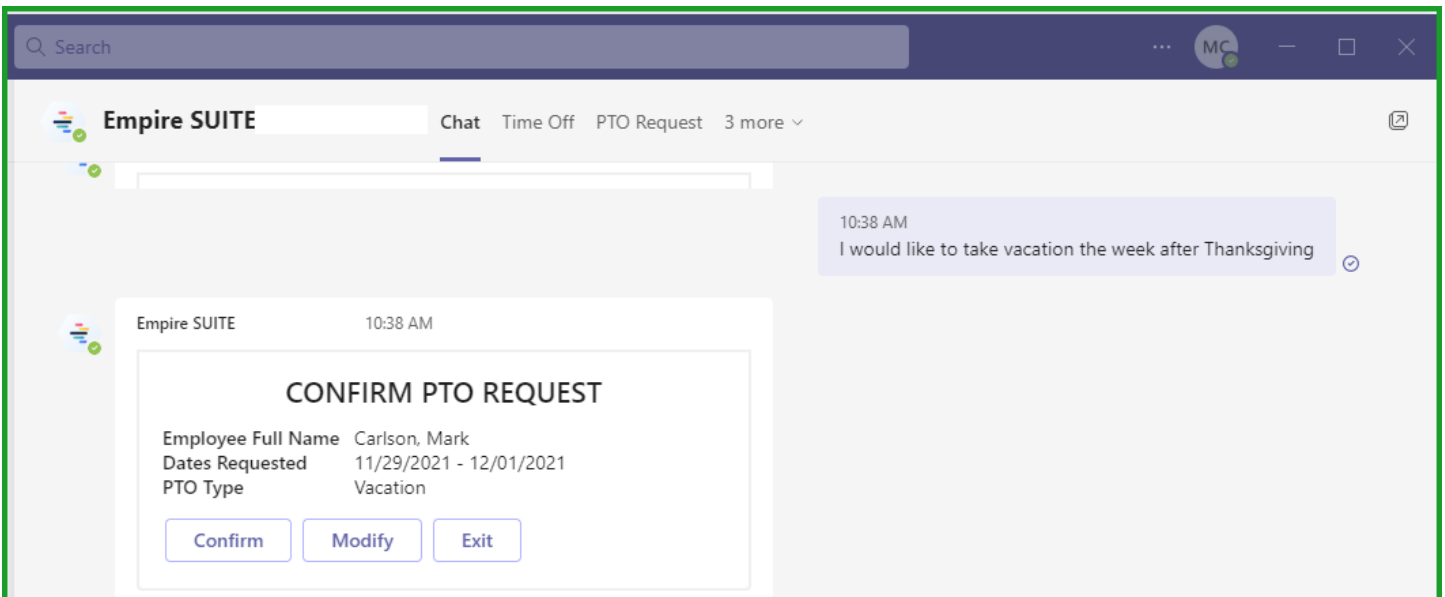

Figure 8 – Empire SUITE Bot Chat Messages

Please contact WSG for more information about the Microsoft Teams Empire SUITE bot. We'd be happy to work with you to install the bot in your account.

Excel Imports for Employee Status and Reports To Manager Updates

We've added two new imports to make managing your employees and other resources easier: you can now update multiple employees' status and reports to manager using Excel imports. We've added security permissions for the imports. From the Administration \ Company \ Edit Permissions menu, click **Administration** and **Imports** to add the permissions to the appropriate Security Group:
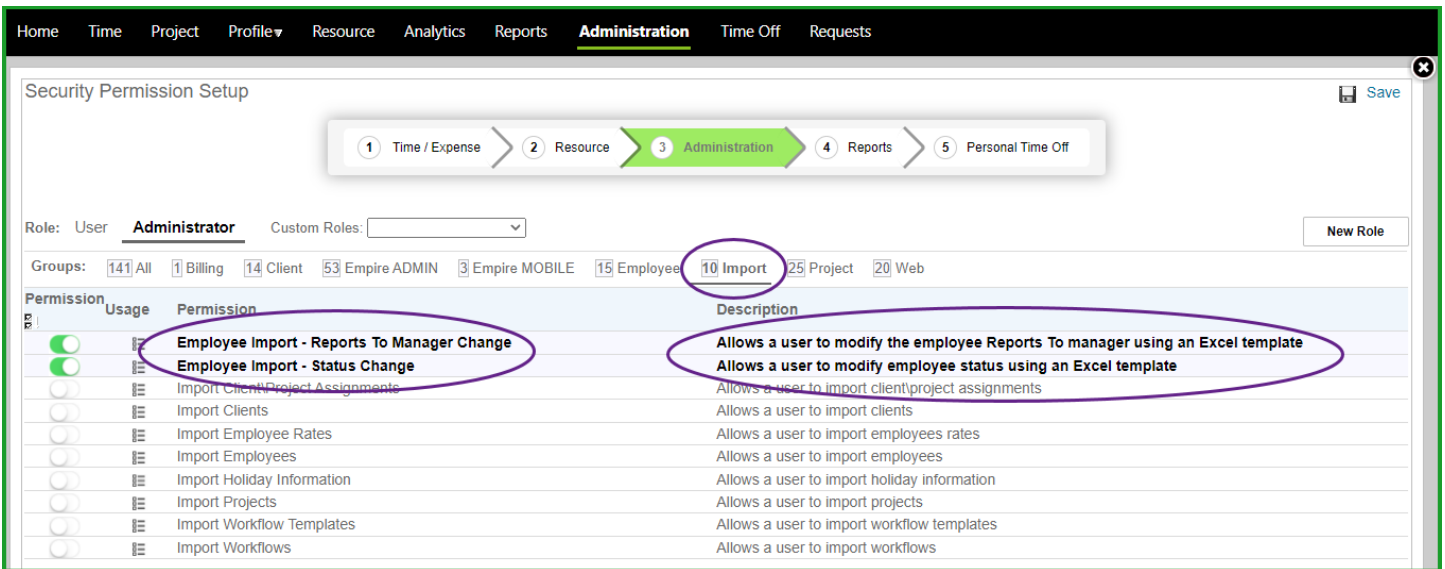
Figure 9 – Employee Status and Reports To Manager Security Permissions

As a reminder, you'll need to log out and log back in for the permissions to be added to the user profile.

The imports are located in the Administration \ Loads/Integration menu:
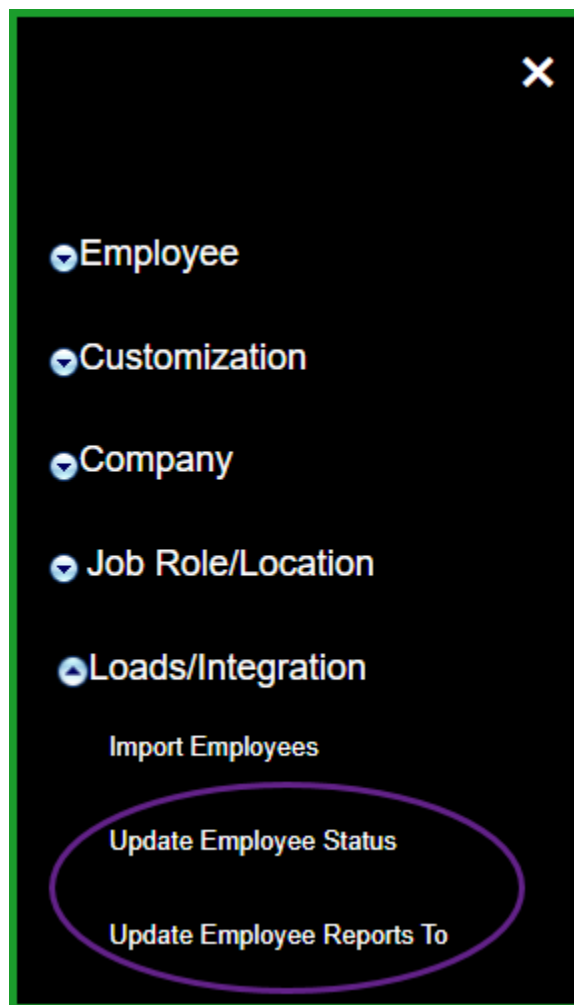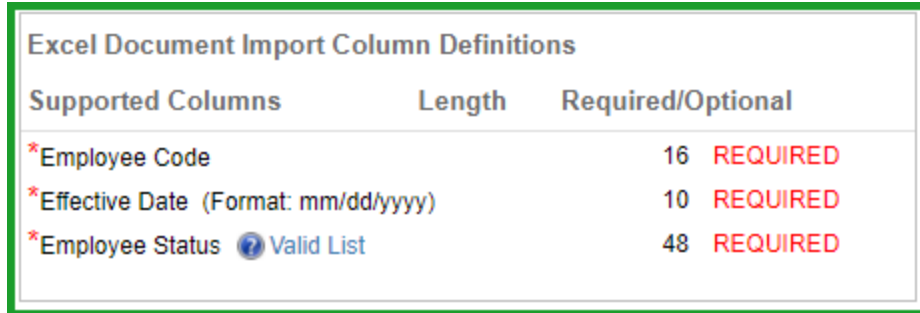

Figure 10 – Employee Status and Reports To Options

As with the other imports, you can select a file from your library or download a template file from the Import page.
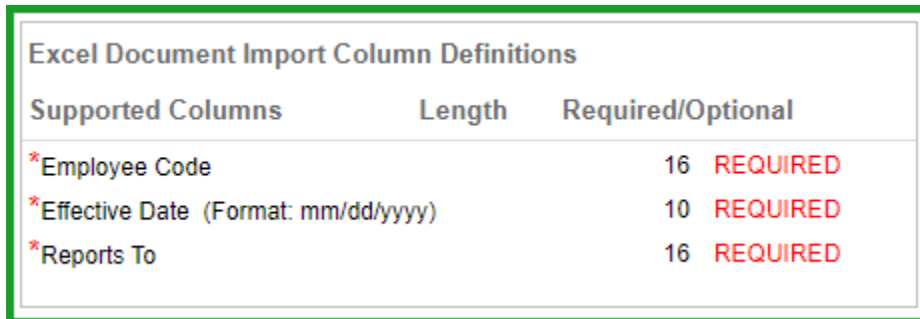
Three fields are required for the Employee Status Update:

Excel Document Import Column Definitions

Supported Columns	Length	Required/Optional
*Employee Code	16	REQUIRED
*Effective Date (Format: mm/dd/yyyy)	10	REQUIRED
*Employee Status ❓ Valid List	48	REQUIRED

Figure 11 – Employee Status Update Fields

Three fields are required for the Employee Reports To manager update:

Excel Document Import Column Definitions

Supported Columns	Length	Required/Optional
*Employee Code	16	REQUIRED
*Effective Date (Format: mm/dd/yyyy)	10	REQUIRED
*Reports To	16	REQUIRED

Figure 12 – Reports to Manager Update

Editing Team Names in All Teams View

We have removed the Teams option from the menu bar. Creating and managing Teams is now done in either the Resource page or the Analytics page, and you can edit team names in the All Teams page. From the Resource page, click **Teams**, then click **Display All Teams**:
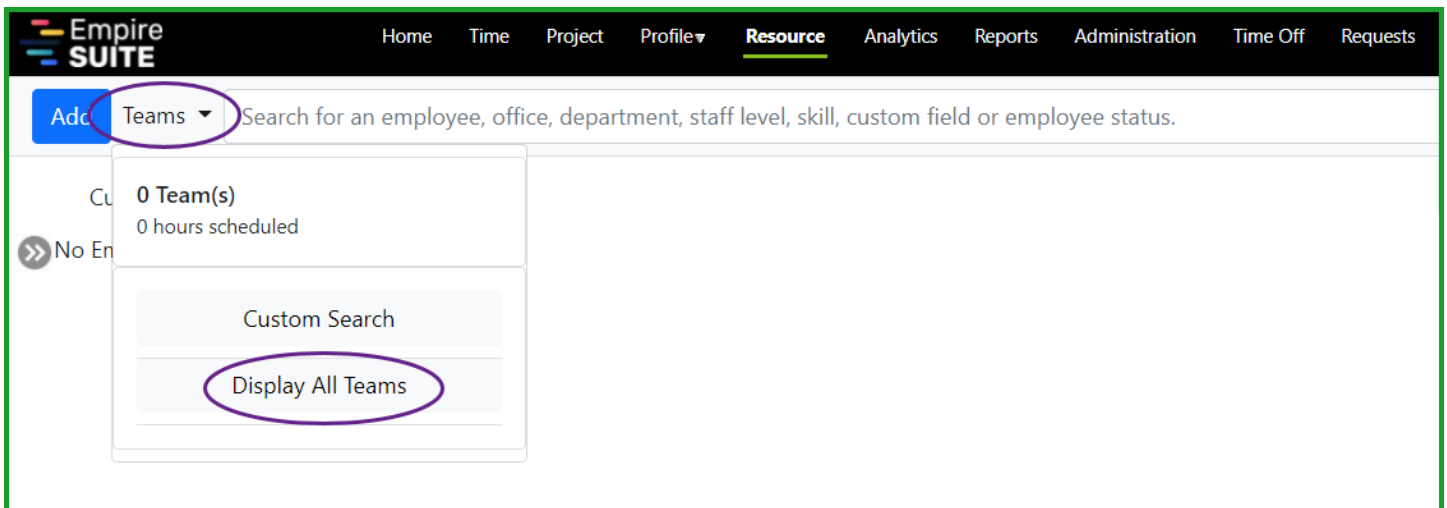

Figure 14 – Display All Teams

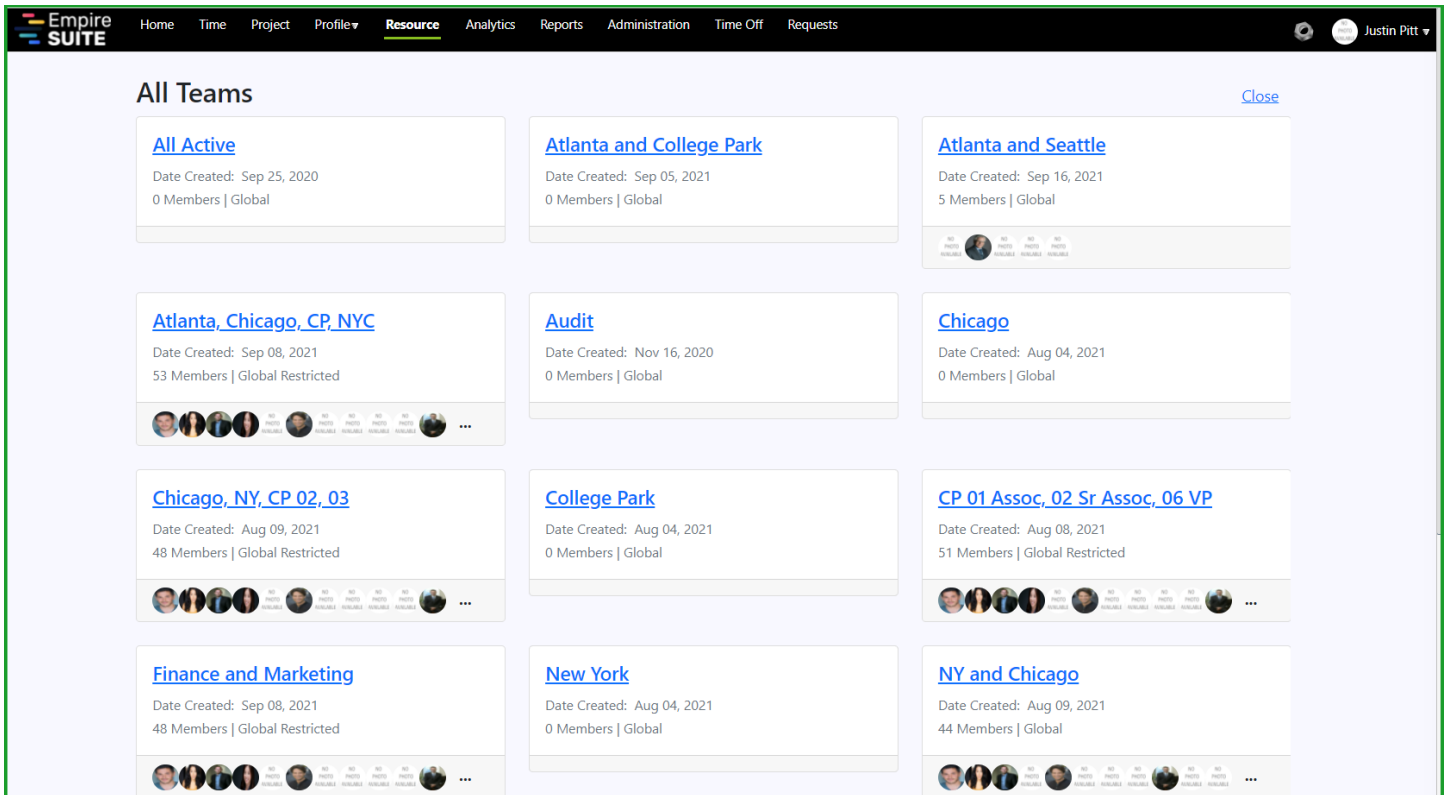Select the appropriate team from the page. . .

Figure 15 – All Teams View

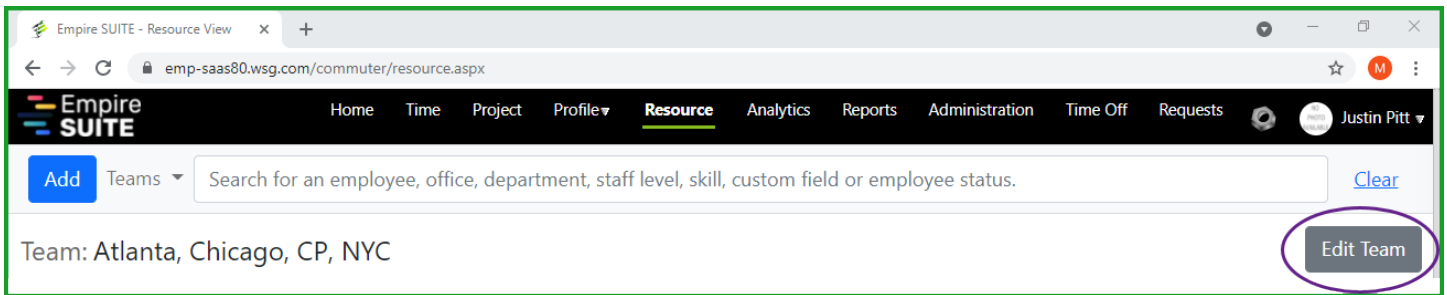. . . and click Edit Team

Figure 16 – Edit Team

Users with the appropriate security permissions can edit the Team information. Click **Save changes** to update the team information:
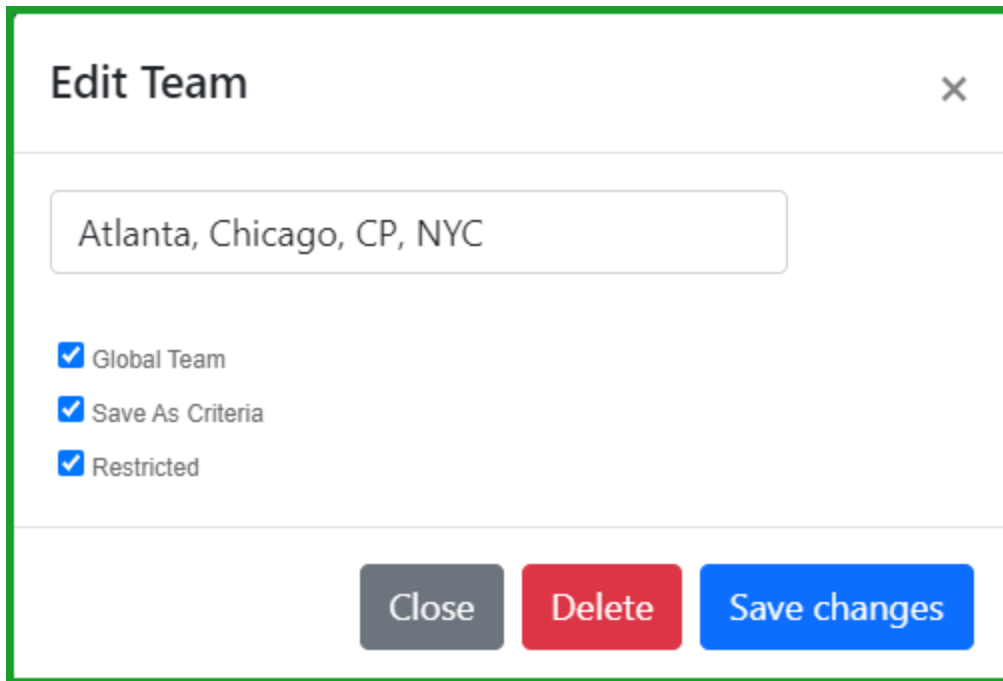
Figure 17 – Editing Team Information

My Schedule Portal View Others Permission

We've added a new permission which will allow administrators to control whether or not employees can see other employee schedules from the My Schedule page. Previously, any My Schedule user could see any other user's schedule by clicking the Change Employee link. That link is gone, unless the user has the My Schedule Portal – View Others Permission:
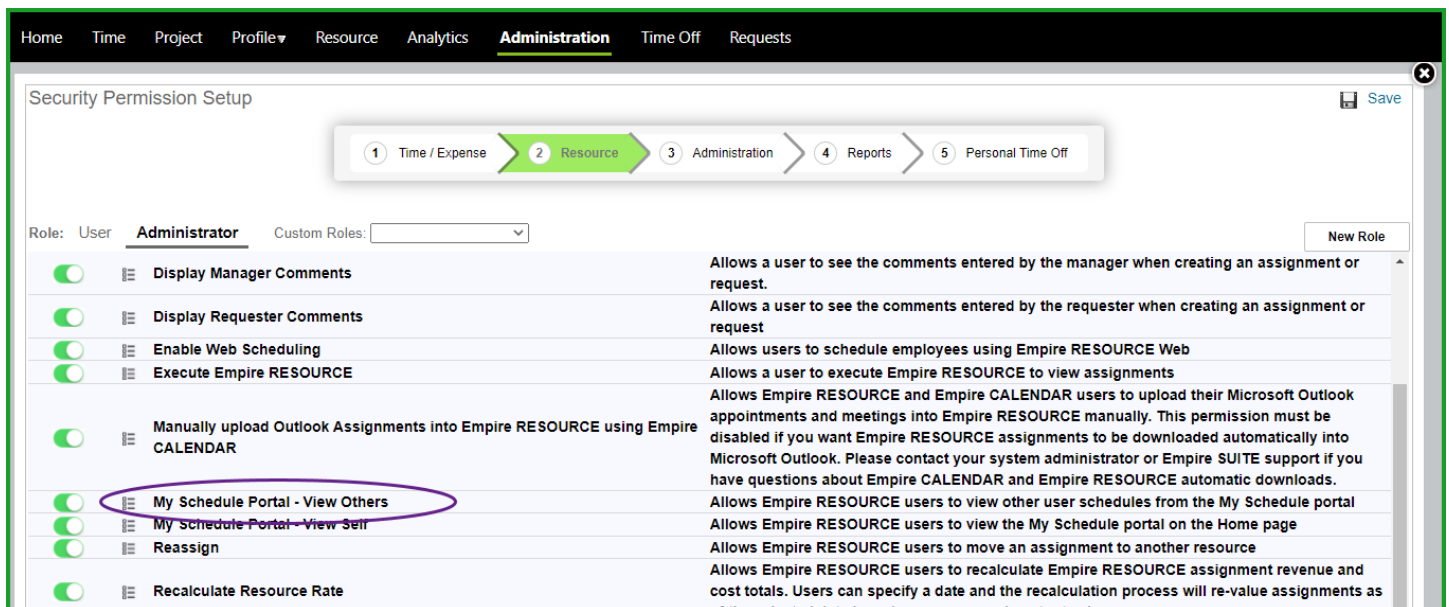

Figure 18 – My Schedule Portal – View Others Permission

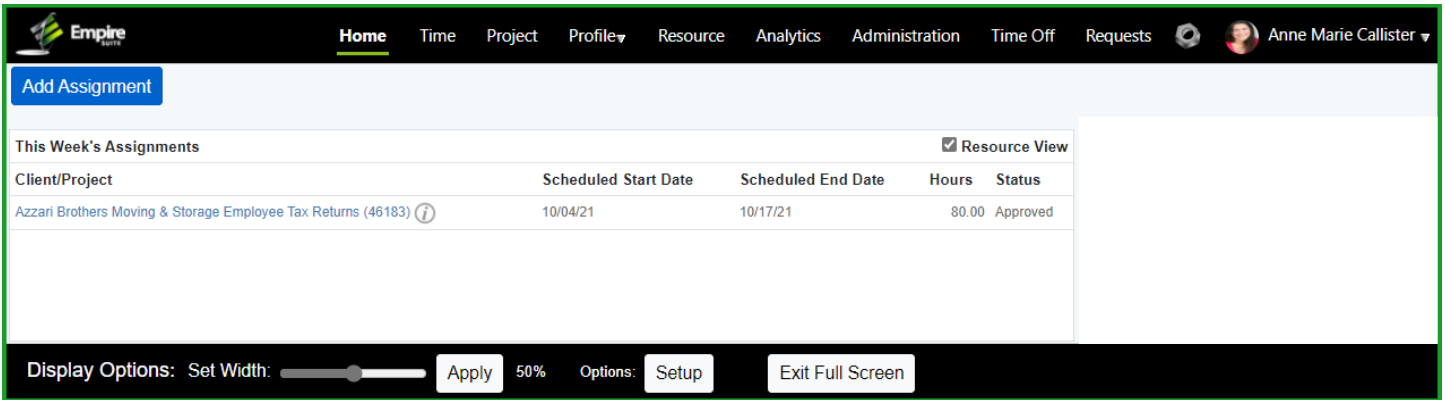Users without the My Schedule Portal – View Others permission will now see this view. . .

Figure 19 – My Schedule Portal without Change Employee link

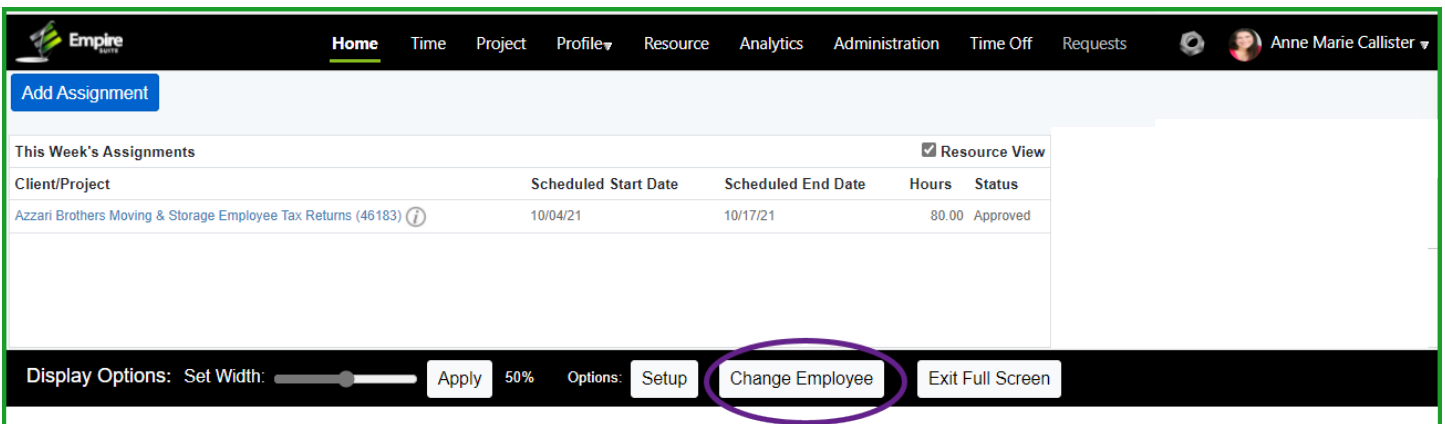. . .while users with the My Schedule Portal – View Others permission will see this view:

Figure 20 – My Schedule Portal with Change Employee link

Current Period v Last Unfinished Period Timesheet Option

You can now decide whether you want your timesheet to open to your last unfinished period or to the current period. From the timesheet, click the **gear icon** to open the Timesheet Setup page. Select the preferred option:
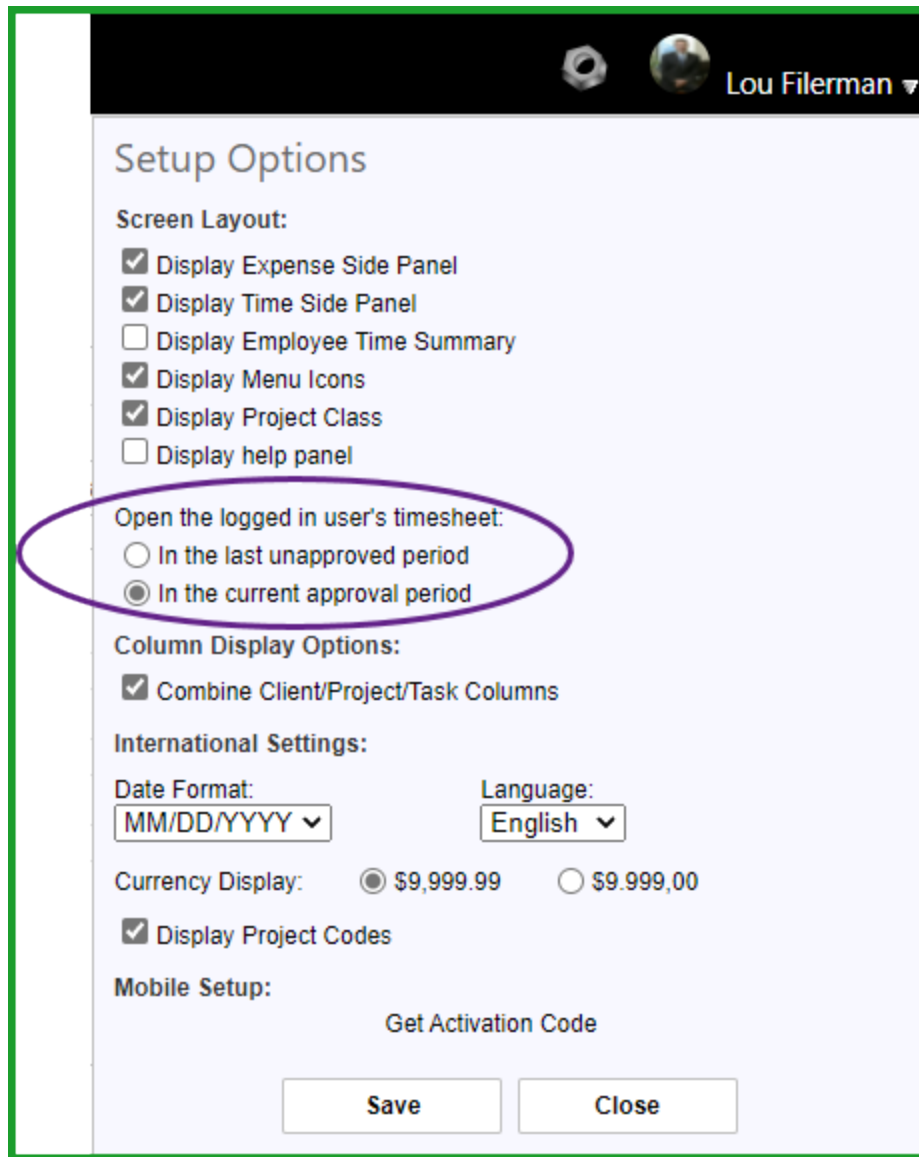
Figure 21 – Current Period or Last Unfinished Period Option

Please note if you switch from Last Unfinished to Current period, we will refresh the timesheet to the current period when you save the change and close the page.

Exception Time Entries in Future Periods

Administrators can now decide whether or not to include future time off 'Exception' items in the resource schedule. For example, if a user has approved intermittent FMLA, the user's future scheduled events can be included in the resource schedule display. Previously, exception time entries were only added to timesheets.

We will be adding a UI in an upcoming version to allow your administrators to set the time periods for each Time Off type. In the interim, please contact WSG and we'll work with you to update your account to cover the desired time periods.

Updated Tenant Owner Page

We've added a couple of options related to Empire RESOURCE to the tenant owner page. For our clients who allow their users to create their own resource assignments, the tenant owner can set the default status for an assignment, or allow the user to make a request or create a tentative assignment.

We've also added an option to set the Resource display for users to full screen on the home page:
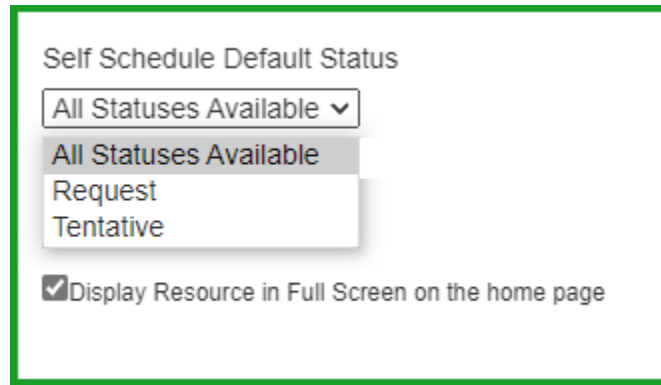

Figure 22 – Updated Tenant Owner Page

Please note the ***Display Resource in Full Screen on the home page*** option works when resource scheduling is the only application used in your account. If you use time and expense entry or time off, users will see their available portals on the home page rather than the full screen resource display

Requests and Opportunities Page

An emerging trend for professional services firms is 'self scheduling' by employees, that is, employees can see a list of opportunities and schedule themselves on selected assignments, or employees who have been scheduled on an assignment can 'reject' the assignment. To support this process, we've added a new page where resources can schedule themselves against available assignment requests, or reject a planned assignment.

The Requests menu option is associated with the **Add/Modify/Delete Named Resources** permission. Users with this permission will see **Requests** in the menu bar
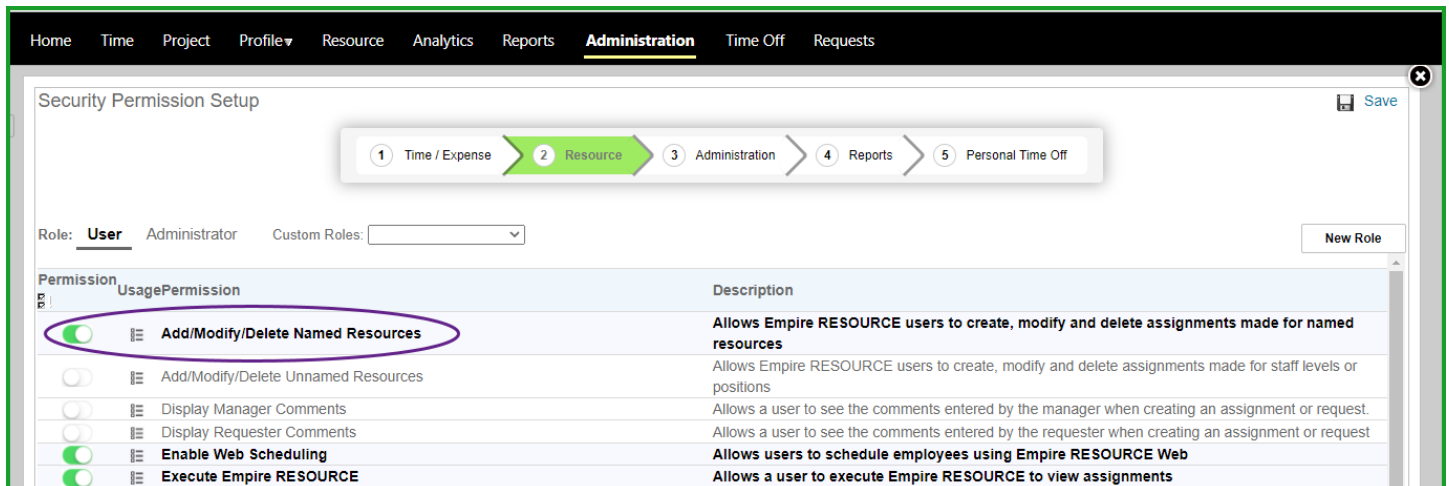

Figure 23 – Requests Menu Option Permission

Resource Requests and Tentative Assignments are user selectable by Team. Recently used Teams are displayed in the left panel of the page.

There are several radio buttons in the upper right corner of the Requests page. These radio buttons determine whether the page displays Requests or Opportunities:
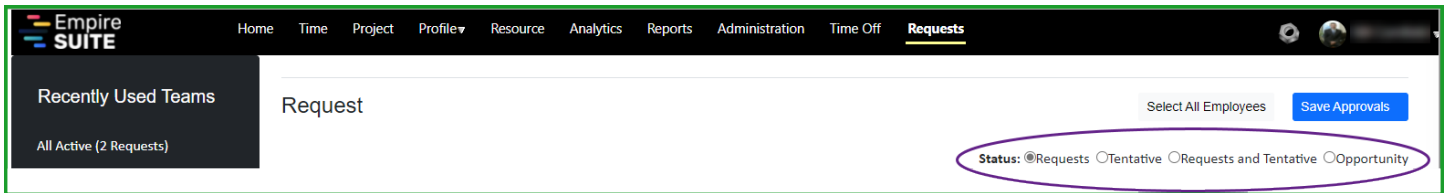

Figure 24 – Requests Page

Requests

There are three different statuses for resource assignments

- Approved
- Tentative
- Request

The Requests page includes only tentative resource assignments and resource requests. From the radio buttons above, you can display tentative assignments, assignment requests or both. (Please note Opportunities will be discussed in the Opportunities section)

Below is an example screenshot displaying requests and tentative assignments for named resources belonging to the All Active team:
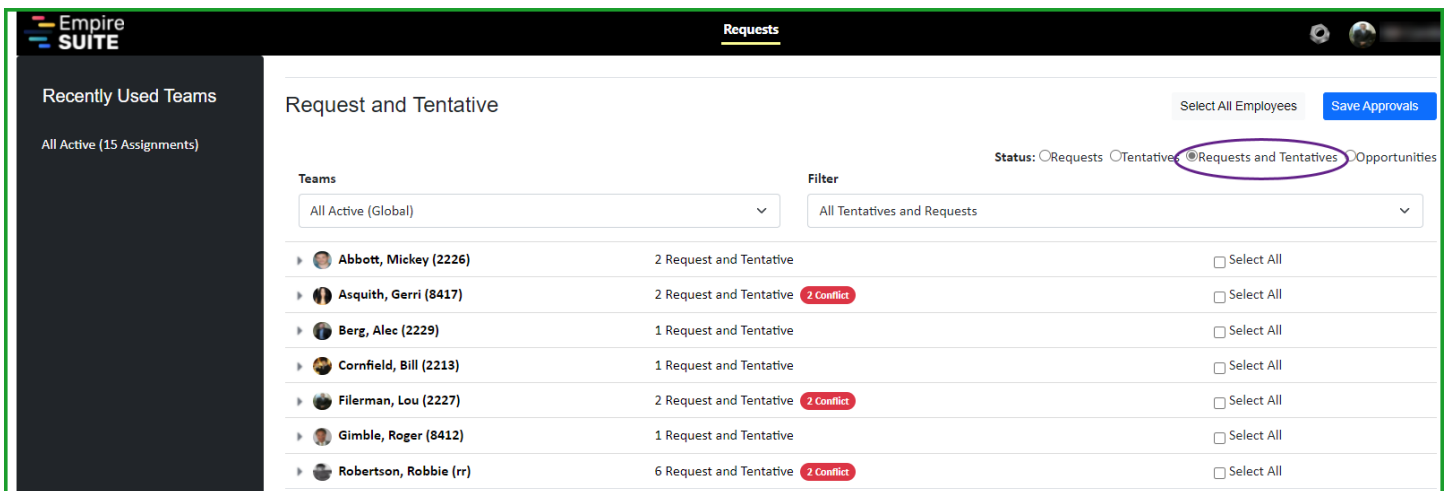
Figure 25 – Resource Requests

Click the arrow icon next to a resource name to see the request and conflict details. For Lou Filerman below, we can see he has a tentative assignment with a conflict, and a two-week assignment request with one of the weeks generating a conflict:

Filerman, Lou (2227) — 2 Request and Tentative — 2 Conflict — ☐ Select All

16 Handles / Expatriate Returns (24670-01) **Conflict** — Approve   Requests   Reject
Status: Tentative Total Assignment (Original\Revised): 0.00\40.00
Date Range:10/25/21 - 10/29/21

Modify Date	Comment	Week Starting		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
		Oct 24	Original	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Revised	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
			Total Scheduled	0.00	16.00	16.00	16.00	16.00	16.00	0.00	80.00

Giant Stores / Audit (45681-01) **Conflict** — Approve   Tentative   Reject
Status: Request Total Assignment (Original\Revised): 0.00\80.00
Date Range:10/18/21 - 10/29/21

Modify Date	Comment	Week Starting		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
		Oct 24	Original	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Revised	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
			Total Scheduled	0.00	16.00	16.00	16.00	16.00	16.00	0.00	80.00

Modify Date	Comment	Week Starting		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
		Oct 17	Original	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Revised	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
			Total Scheduled	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00

Figure 26 – Request and Tentative Details

Users with the appropriate permissions can create an approved assignments from the request, change the status of the request to a Tentative assignment or reject the request entirely. If the Select All checkbox is enabled, the user can apply the desired action to all of the Requests and Tentative assignments for the selected user.

A quick note about 'Rejecting' an assignment: If a user has the ability to get to the Requests page the user can see the assignments they've been assigned to tentatively or requested to work on. If the user also has the **Web – Edit Assignment Self** permissions, the user can Reject the request or tentative assignment:

Request — Select All Employees — Save Approvals

Status: ⦿Requests ◯Tentatives ◯Requests and Tentatives ◯Opportunities

Teams: All Active (Global)
Filter: All Requests

Abbott, Mickey (2226) — 1 Request — ☐ Select All

Raven Inc. / Expatriate Returns (32499-01) — Approve   Tentative   Reject
Status: Request Total Assignment (Original\Revised): 0.00\40.00
Date Range:11/15/21 - 11/19/21

Modify Date	Comment	Week Starting		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
		Nov 14	Original	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Revised	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
			Total Scheduled	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00

Figure 27 – Rejecting a Tentative Assignment or Request

Rejected assignments will disappear from the user's list

Another use of the Reject feature is for a resource or project manager to restore an assignment back to the original hours after it has been modified by the resource. For example, Mickey Abbott was originally assigned 8 hours per day on the Shell Oil/Executive Returns project, but he has informed his manager he can only spare a couple of hours per day:

Figure 28 – Restoring a Modified Assignment

The resource or project manager can approve the request, set the request to tentative or reject the change made by the user to restore the assignment to its original hours by clicking Approve, Tentative or Reject as appropriate.

Opportunities

Opportunities are outstanding requests for unnamed resources, or Staff Levels. Click the Opportunities radio button to see a list:

Figure 29 – Opportunities

You can filter Opportunities by Staff Level, Office and Department. Users with the appropriate permissions can apply for the assignment by clicking the Apply button.

Resource managers can expand a request to see who the system generated best matches are, along with users who have applied for the assignment:

Figure 30 – Opportunity Matches

The Best Matches are based on the requested staff level, office, department and availability.

The **GREEN** line above each match indicates the user's availability for the assignment. As you can see, both Brian and Emelia are 100% available for the 80 hours, but Lou has another assignment so he is only 50% available.

The Auto Rotation link will flip the card to show you the resource's skills, as well as the resource's capacity, scheduled and available hours. You can click the View Profile link to see detailed employee information, and the Schedule, Email and Text links will save the selected user to the assignment, open an email window so you can send the resource an email about the assignment or send the user a text message if the user is configured to accept text messages:
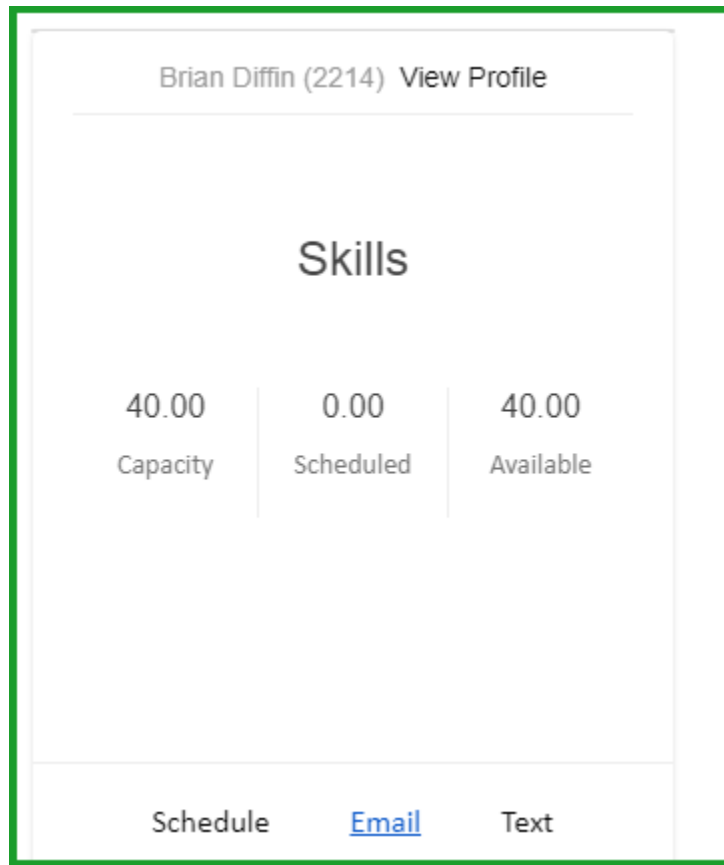
Figure 31 – Card View Auto Rotation

The Card check box on the right side changes the view from the card view as shown above to a grid view:

Figure 32 – Opportunity Grid View

Clicking the disc icon will save the assignment for the selected resource and close the grid view.

The **i** icon will display detailed user information:

Figure 33 – Grid View Employee Information

You can also see the employee profile information from the card view by mousing over the **Auto Rotation** link below the resource availability

The mail icon will open an email window so you can send an email about the assignment to the selected resource

The **A** icon will open the profile page to the Text Message tab so you can send a text message to the selected resource about the assignment, if the resource is configured to accept text messages:
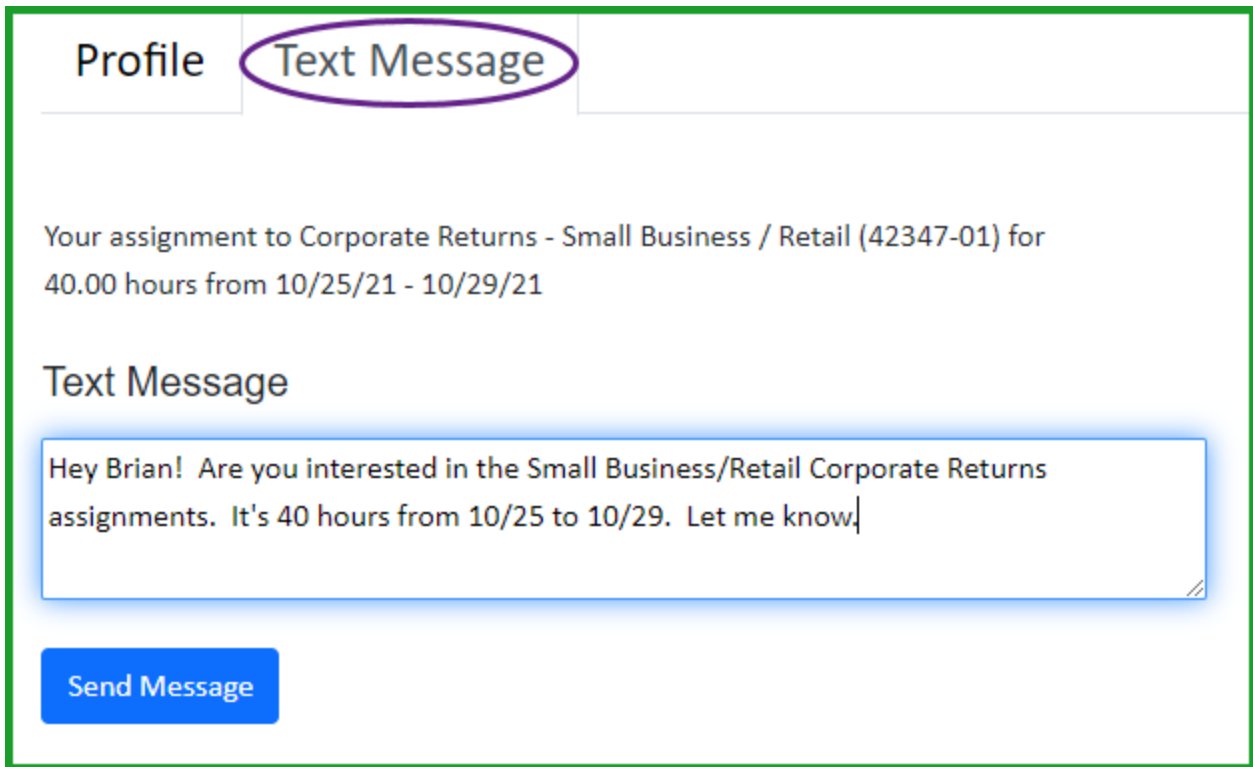
Figure 34 – Opportunity Match Text Message

Resource Assignment In Cell Editing

We've added the ability to modify an assignment's duration using in cell editing. From the Resource page, click the Edit Mode **Resource** radio button:

Figure 35 – Resource Edit Mode

Note the 8.00 hours in the above assignments are open for editing. Users with the appropriate security permissions – **Web – Edit Assignment Self** – can modify the hours value:
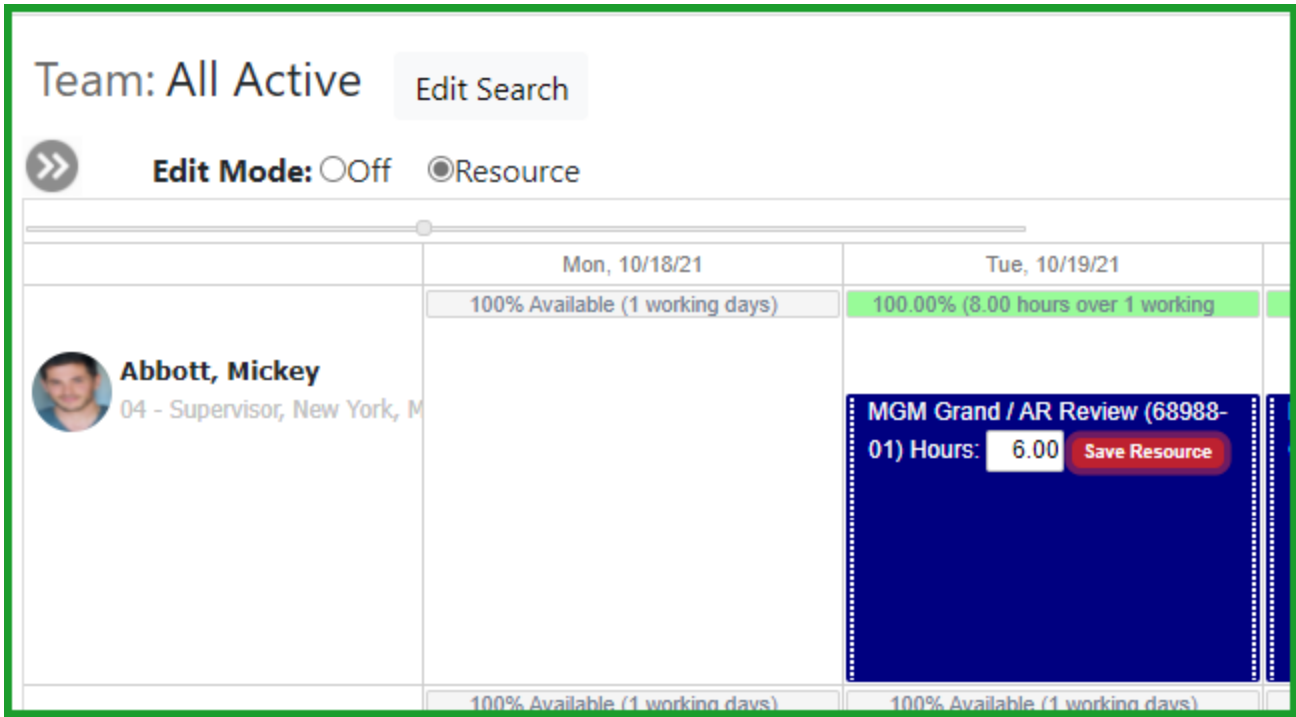
Figure 36 – Editing a Resource Assignment

Click **Save Resource** to save the changes

Add Time from the My Schedule Page

Users with the appropriate security permissions can now add time to their timesheets directly from the My Schedule page. Click the Edit Mode **Time Entry** radio button:
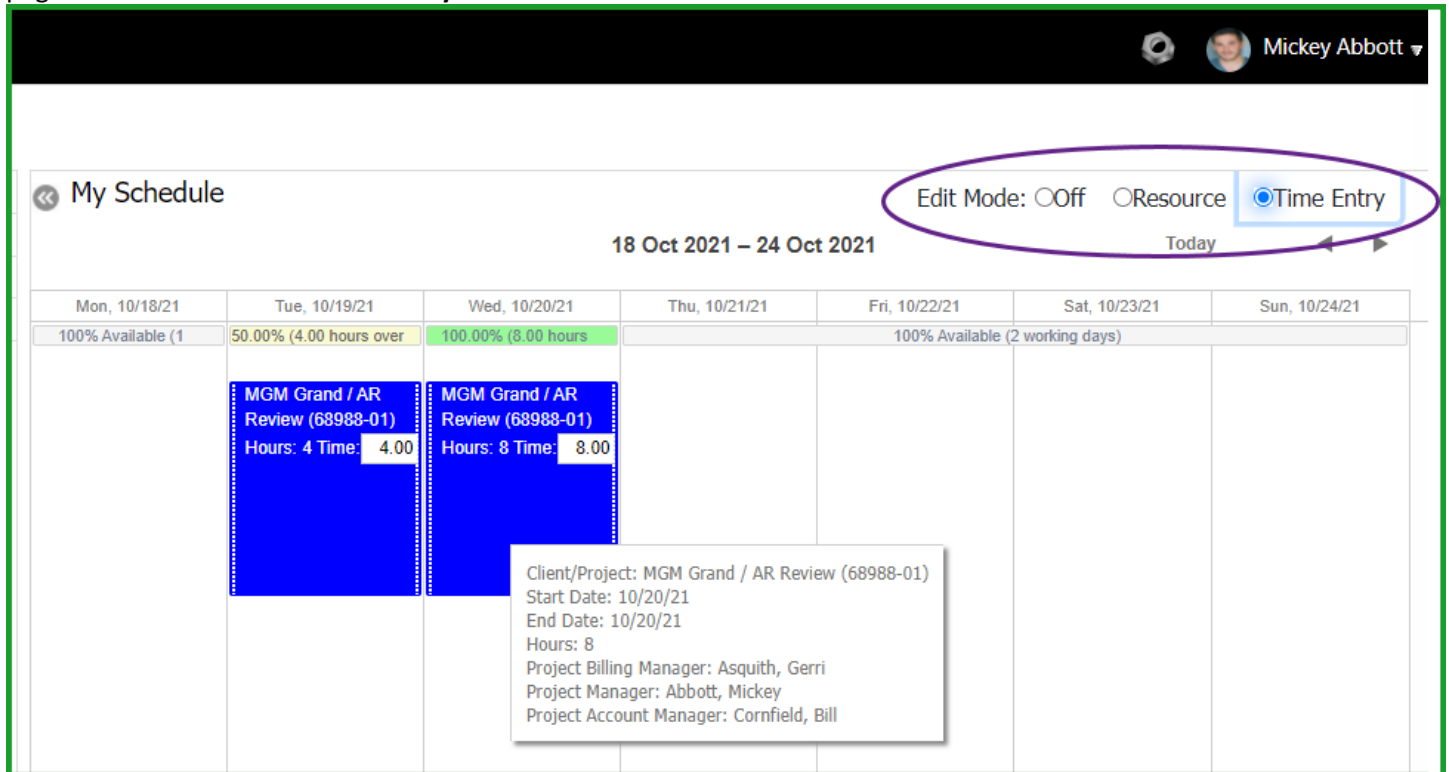

Figure 37 – My Schedule Time Entry

You can accept the scheduled time by mousing over the value, or you can make a change to the scheduled hours as appropriate. Click the Post Time link to move the time into the timesheet.

Figure 38 – Adding Time from the My Schedule Page

Please note time entry is only allowed when the My Schedule page view mode is set to Daily mode.