

What's New in Empire® SUITE July 2024?

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What's New in Empire® SUITE July 2024?

Enhancements in this Release

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

- New Empire AUTOMATED TAX SCHEDULING (ATS) Features
- Empire RESOURCE Improvements
- Practice Engine integration Enhancements
- Improved Resource Copy
- New Resource-related system generated email messages

New Empire AUTOMATED TAX SCHEDULING (ATS) Features

We've added several new features to Empire AUTOMATED TAX SCHEDULING (ATS)

- You can edit the workflow directly in Empire RESOURCE, and the changes are written back to CCH Access Workflow or Practice Engine, depending on your integration platform:
 - Move the Assignment to another Staff member
 - Change the Priority
 - Edit the Budgeted hours Amounts
 - Edit the Return Target Dates
 - Pause the Workflow for a specified number of days
 - Change the Workflow Status
 - Run the Workflow Optimizer from within a Workflow

Editing a Workflow

Click the assignment in Empire RESOURCE to launch the Assignment Editing menu. You'll see a new **Edit Workflow** menu option:

The screenshot displays the Empire SUITE interface. At the top, there is a navigation bar with options: HOME, TIME, PROJECT, PROFILE, RESOURCE (highlighted), ANALYTICS, REPORTS, ADMINISTRATION, TIME OFF, and REQUESTS. Below the navigation bar is a search bar with the text "Search for a Client, Project, office, department or custom fields." and a "Add Schedule" button. The main content area shows a "Portfolio: Custom Search" section with a search icon and a refresh icon. Below this is a calendar view for the period "1 Jul 2024 – 21 Jul 2024". The calendar has columns for days of the week and rows for dates. A resource entry for "Baumgartner, Nolan p (7315729) / 50971125/T1 return for Baumgartner, Nolan" is visible, with a total of 8.00 hours for the week of 07/01/2024 and 2.75 hours for the week of 07/08/2024. A context menu is open over the calendar entry, listing options: Edit Workflow, Project Team, Project Information, Delete Selected Assignment, and Close. A red arrow points to the "Edit Workflow" option.

Figure 1 – Edit Workflow Menu Option

Click the **Grid** menu icon in the Worksteps area of the Edit Assignment page:

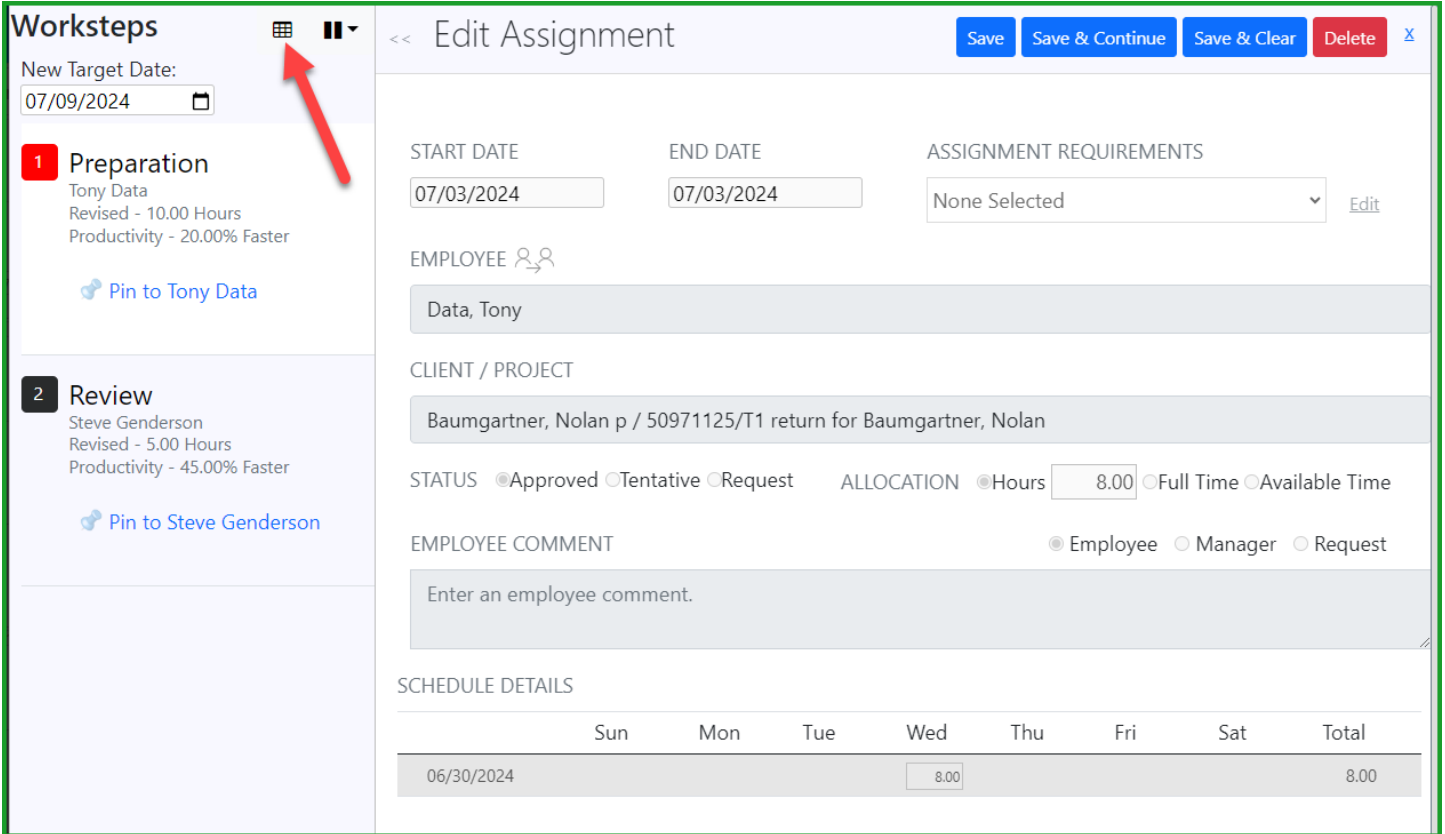


Figure 2 – Edit Workflow Details Option

There are now multiple options for managing your Empire AUTOMATED TAX SCHEDULING created assignments:

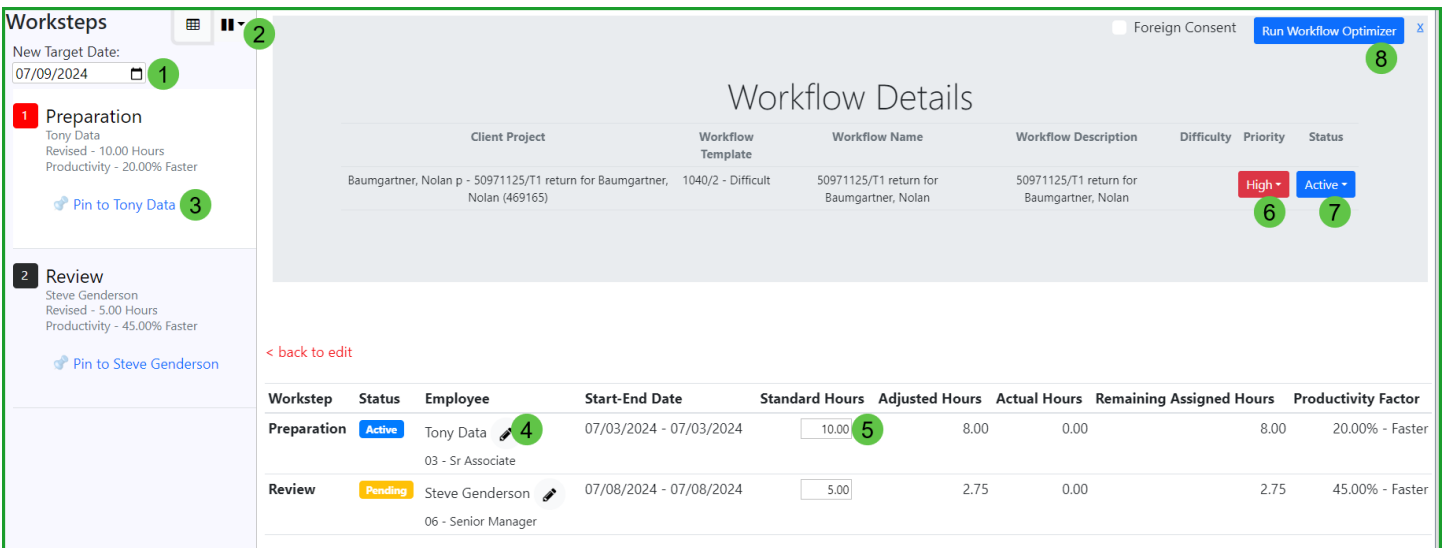


Figure 3 – Editing the Workflow Details

1. Click the Calendar icon or type in a date to create a New Target Date for the Workflow
2. Click the Pause icon to pause your workflow for a specified number of days
3. Click the Pin icon to pin the work step to the currently assigned staffer
4. Click the Pencil icon to reassign the work step to someone else
5. You can edit the workflow Standard Hours by entering a new value in the field
6. Click the Priority link to change the workflow priority
7. Click the Status link to change the workflow status
8. Click the Run Workflow Optimizer link to reschedule your workflow based on any changes you've made

Empire RESOURCE Improvements

Several Empire RESOURCE improvements are included in this release:

Updated Empire RESOURCE Page

We've moved the view and setup options from the top and bottom of the page to a panel on the left side:

The screenshot displays the Empire RESOURCE interface. At the top, there is a navigation bar with tabs for HOME, TIME, PROJECT, PROFILE, RESOURCE (selected), ANALYTICS, REPORTS, ADMINISTRATION, TIME OFF, and REQUESTS. Below the navigation bar is a search bar and a portfolio filter section. The main area shows a resource grid for the period from 20 May 2024 to 9 Jun 2024. The grid is organized by client/project, with two main sections: '407 Cafe (4941734) / Financial Statement Audit' and '5 Napkins, Inc. (5628954) / 401(K) Audit'. Each section lists staff members with their assigned hours for each day. A left-hand navigation panel is highlighted with a red box, containing icons for Employee, Project, Grid, Staff Levels, Setup, and Colors.

Client/Project	Staffer	05/20/2024	05/21/2024	05/22/2024	05/23/2024	05/24/2024	05/25/2024	05/26/2024	05/27/2024	05/28/2024	05/29/2024	05/30/2024	05/31/2024	06/01/2024	06/02/2024	06/03/2024	06/04/2024	06/05/2024	06/06/2024	06/07/2024	06/08/2024	06/09/2024	
407 Cafe (4941734) / Financial Statement Audit	Cornfield, Simba			22						16													
	Filerman, Lou			44						24													
	Haffler, Earl			32						32													
	Van Camp, Tia									36												40	
	06 - Senior Manager			22						18												22	
5 Napkins, Inc. (5628954) / 401(K) Audit	Chang, Donna				28					36												40	
	Gelke, Becky				28					36												40	
	03 - Sr Associate				28					36												40	

Figure 4 – Resource Page View Options

Hours or Assignment Information

We've added an option to see hours instead of assignment information when in a project view:

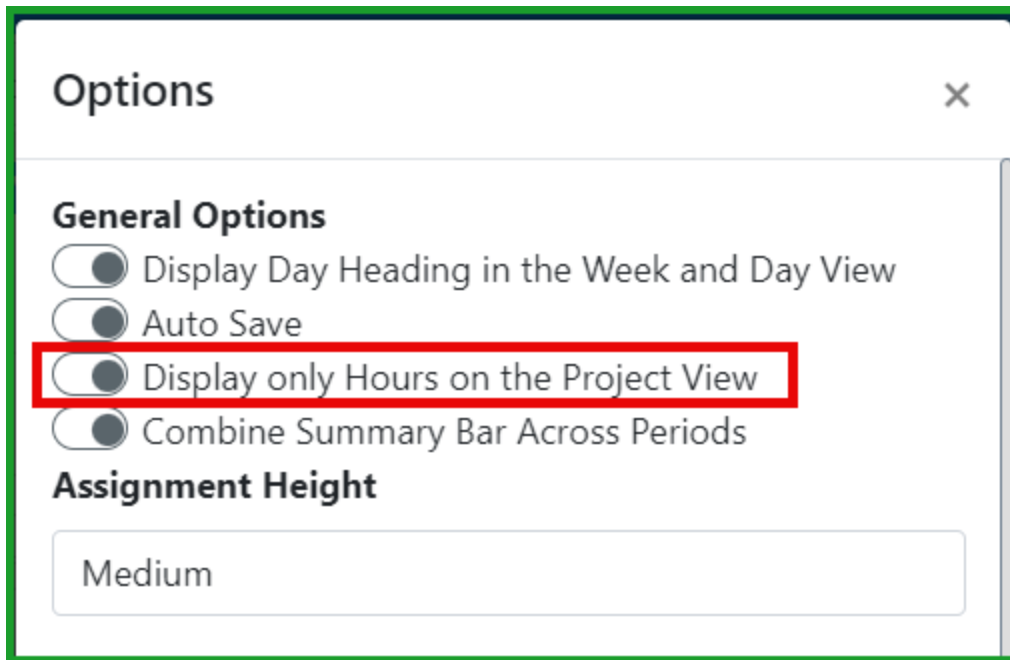


Figure 5 – Display Hours in the Project View Menu Option

	04/01/24							04/08/24						
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	S
Azzari Brothers Moving & Storage / 43401371/Financial Audit	Total 0.00 hours							Total 100.00 hours						
02 - Associate									50					
05 - Manager									50					

Figure 6 – Project Assignment Hours in a Project View

Updated Project Information Page

There are several changes in the Project Information page when you click the project link in a project view:

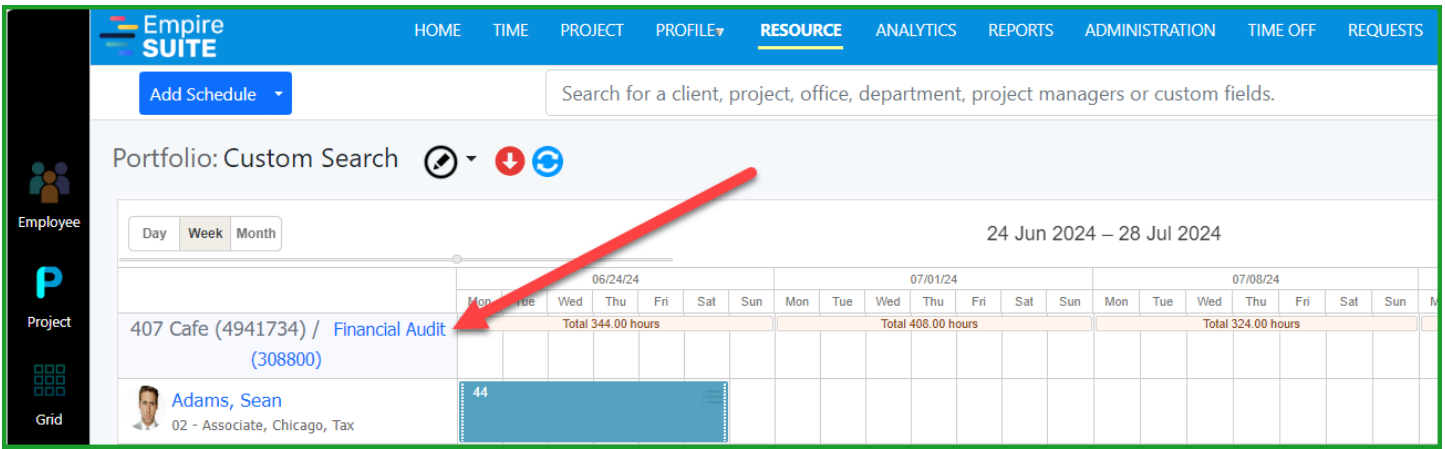


Figure 7 – Project Information Link

The page has been organized into different sections with additional relevant project details:

- General Info
- Summary section for values
- Managers
- Skills Required
- Employees Assigned

Improved Assignment Automation Selection

We've removed the automation 'gear' icon and added a checkbox to each assignment to make selecting assignments for automation easier, especially when displaying assignments in 'Small' mode:

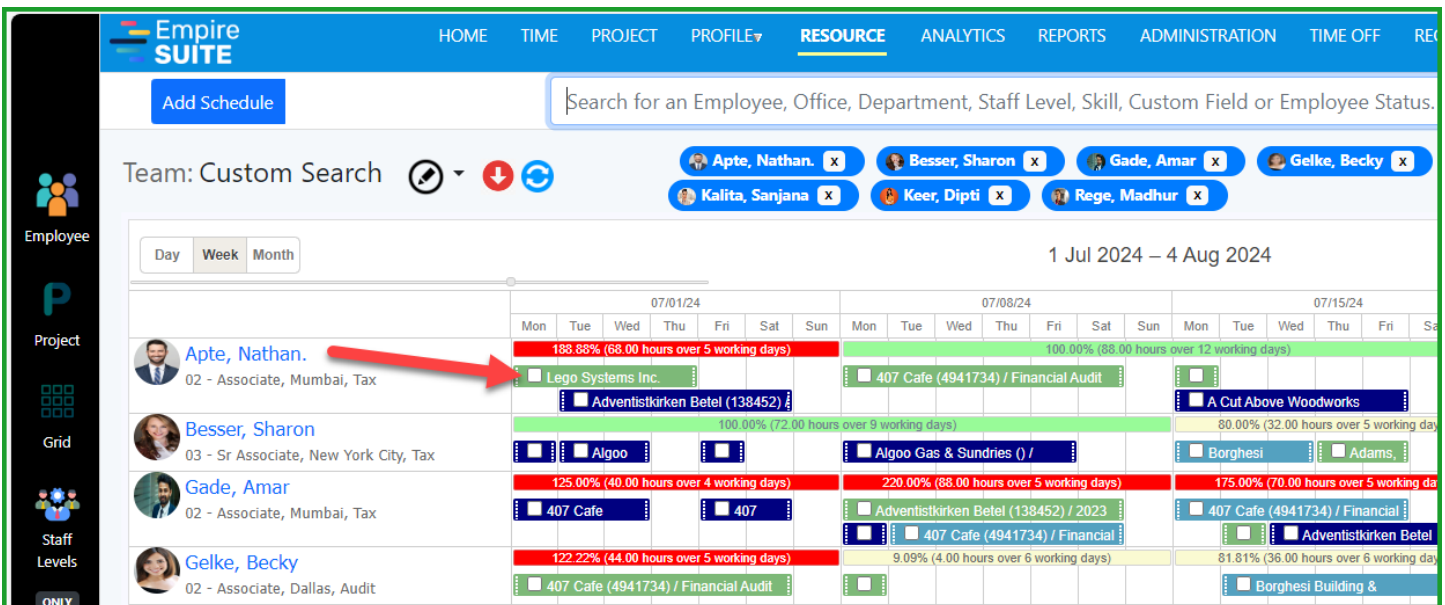


Figure 8 – Assignment Automation Checkbox

We've also replaced the gear icon with a green check mark when selecting all assignments for an employee or a project for automation:

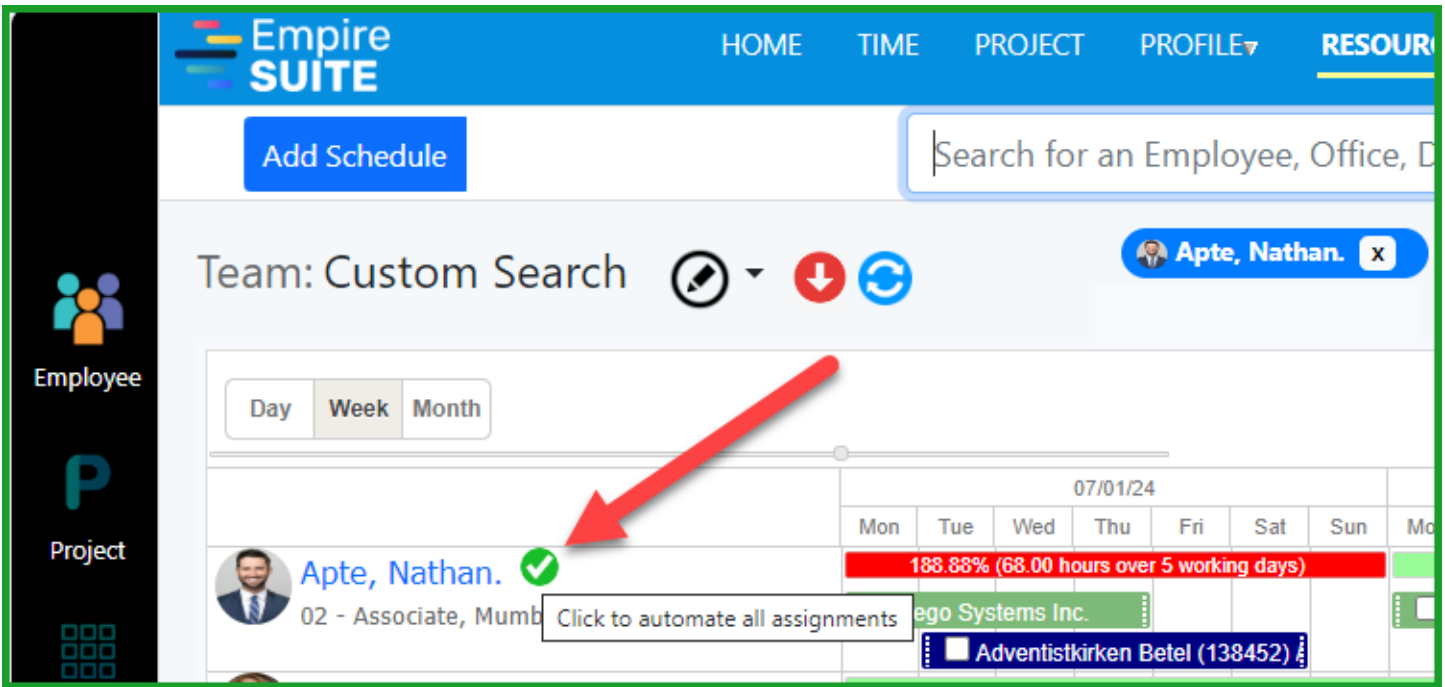


Figure 9 – Employee or Project Automate All Assignments Icon

Clicking the green check mark will add all of the assignments for the employee or project to the Selected Assignments list for Best Match, Recurring Assignments or Moving the assignments, as well as applying assignment requirements to the selected assignments.

Assignment Requirements

Assignment Requirements is now available as a menu option:

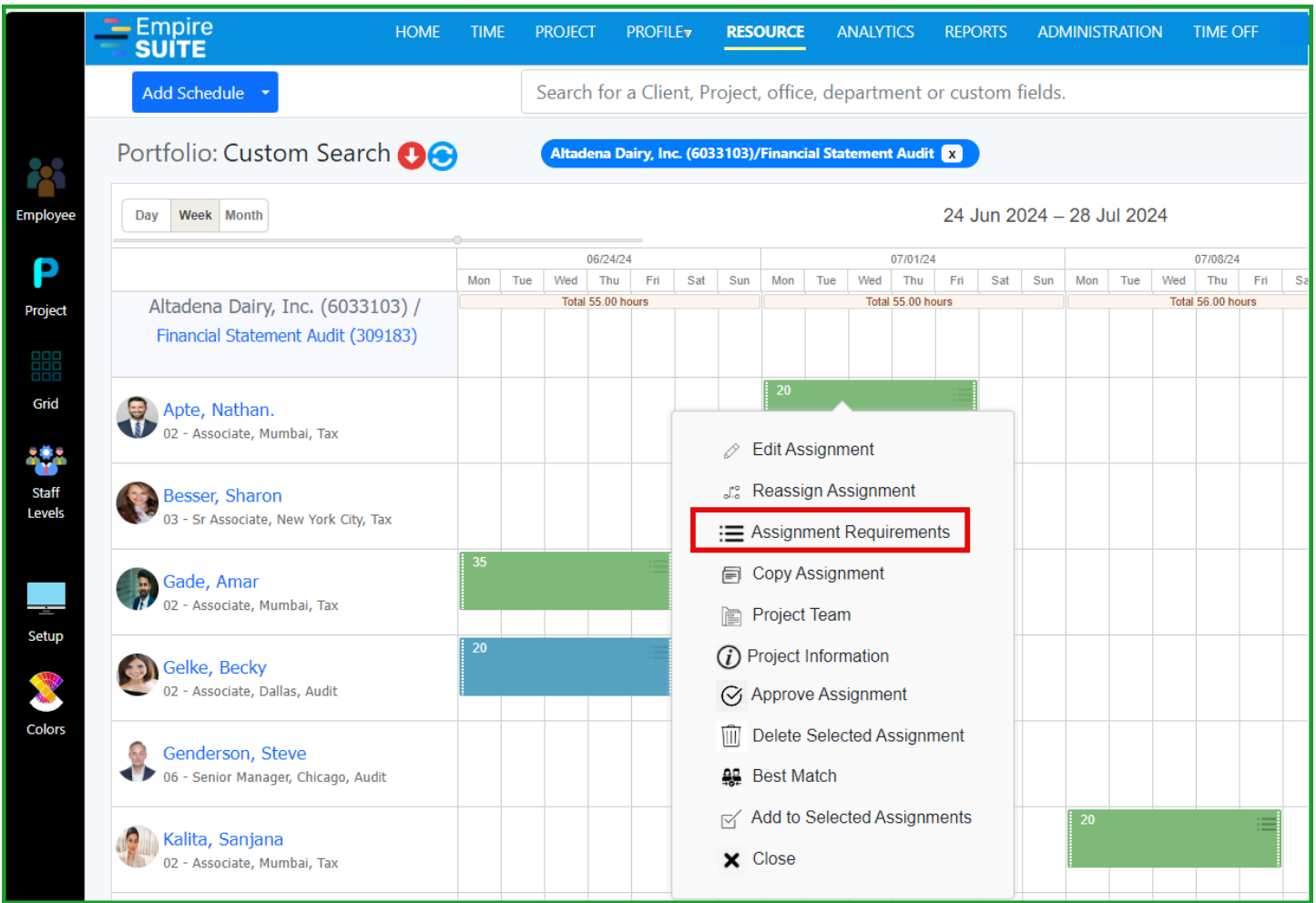


Figure 10 – Assignment Requirements Menu Option

You can also mouse over an assignment and activate a link to review or define Assignment Requirements:

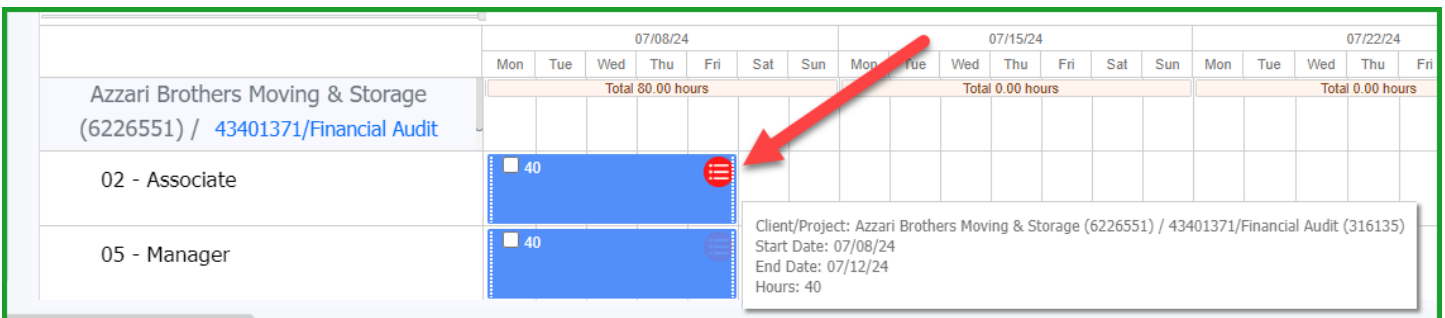


Figure 11 – Assignment Requirements Link

If you select the menu option or click the link, you'll see a completely revamped and updated Assignment Requirements page:

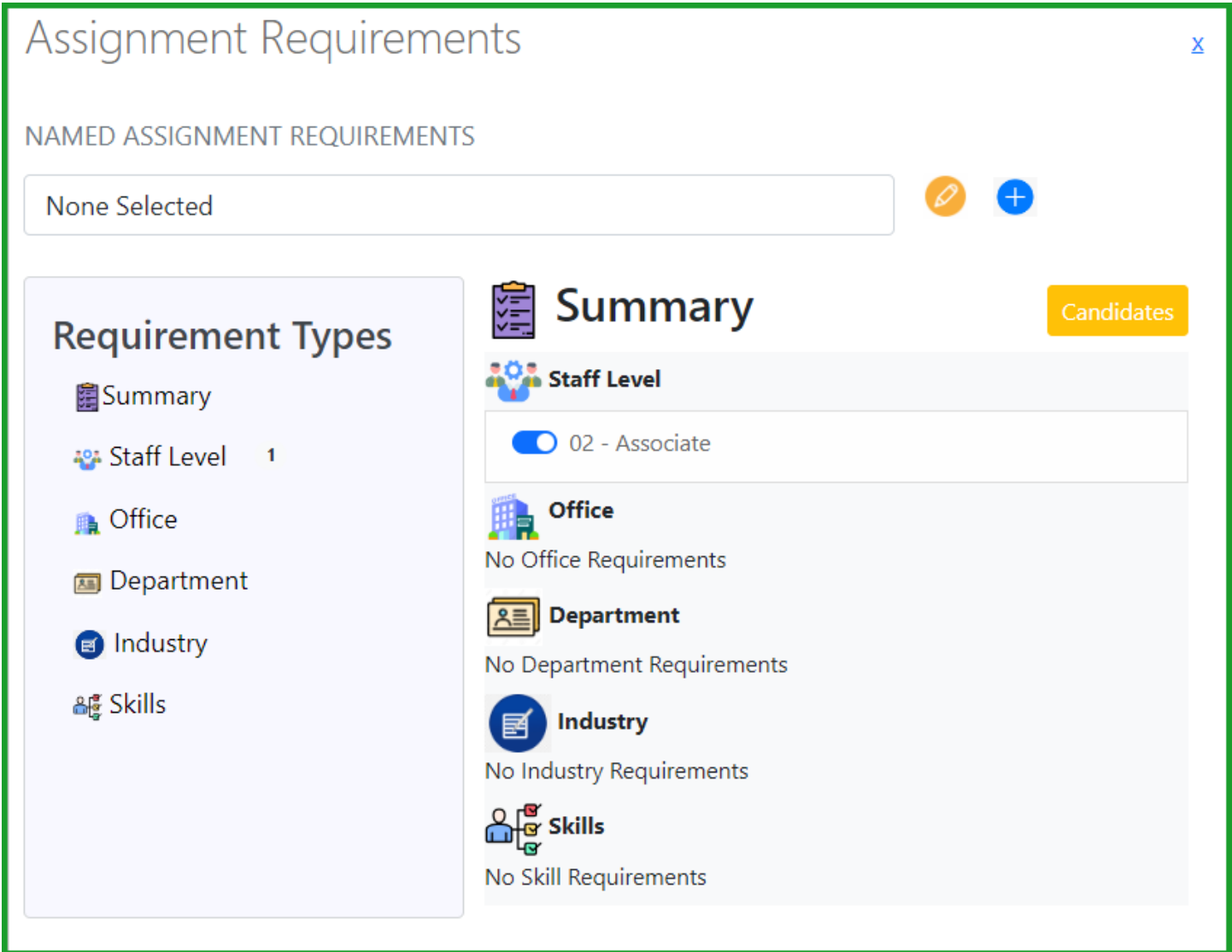


Figure 12 – Updated Assignment Requirements Page

Profile Type Support

We've also added support in Assignment Requirements for an unlimited number of profile types. If you define an additional profile type, such as Certifications, we'll include it automatically in the Assignment Requirement page:

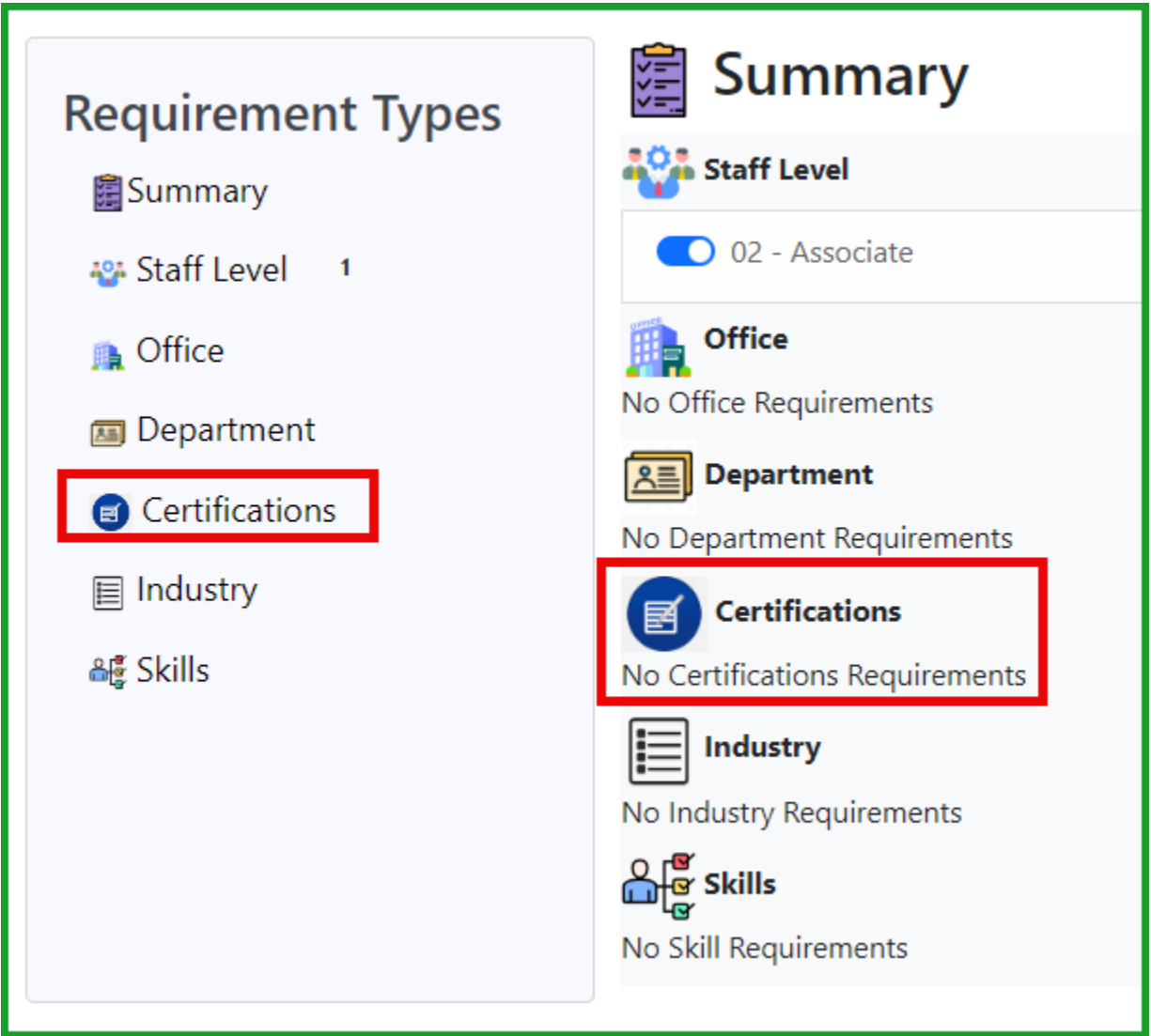


Figure 14 – Additional Profile Types

Profile types are defined in Setup Profile Types under the Profile Menu:

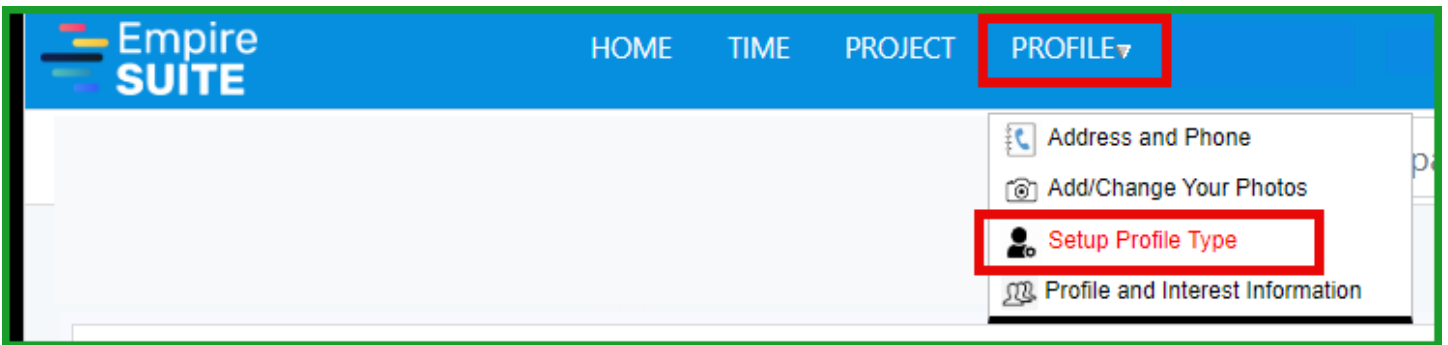


Figure 15 – Setup Profile Types

Below is an example of the Profile Setup configuration for Certifications:

Empire SUITE | HOME | TIME | PROJECT | PROFILE | RESOURCE | ANALYTICS | REPORTS | ADMINISTRATION | TIME OFF | REQUESTS

Staff Profile Information Type Setup

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

Buttons: Add Type, Modify Type, Delete Type

Figure 16 – Staff Profile Type Setup Page

Please contact Empire SUITE support for help configuring Profile types if you have any questions.

Improved Reassignment Function

We've improved the reassignment functionality. Click any assignment to launch the Assignment Menu, then click **Reassign Assignment**:

Empire SUITE | HOME | TIME | PROJECT | PROFILE | RESOURCE | ANALYTICS | REPORTS | ADMINISTRATION | TIME OFF | REQUESTS

Add Schedule | Search for a Client, Project, office, department or custom fields.

Portfolio: Custom Search | Audit | Active

3 Jun 2024 – 23 Jun 2024

	06/03/2024							06/10/2024						
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
407 Cafe (4941734) / Financial Statement Audit	Total 156.00 hours							Total 107.00 hours						
Benson, Martin 03 - Sr Associate, New York City, Audit	44							40						
Cornfield, Simba 08 - Senior Partner, New York, Tax										13				
Filerman, Lou 06 - Senior Manager, New York City, Tax	22							22						
Haffler, Earl 05 - Manager, New York City, Audit			28					32						
Van Camp, Tia 04 - Supervisor, Dallas, Audit	40													
06 - Senior Manager	22													
5 Napkins, Inc. (5628954) / 401(K) Audit	Total 0.00 hours							Total 0.00 hours						
Chang, Donna 05 - Manager, New York City, Audit														
Gelke, Becky 02 - Associate, Dallas, Audit														
03 - Sr Associate														
88 Soundview Avenue LLC (109378) / Financial Statement Audit	Total 0.00 hours							Total 0.00 hours						
Apte, Nathan 02 - Associate, Mumbai, Tax														
Benson, Martin 03 - Sr Associate, New York City, Audit														

Assignment Menu (for Benson, Martin):

- Edit Assignment
- Reassign Assignment**
- Copy Segment
- Project Team
- Project Information
- Approve Assignment
- Delete Selected Assignment
- Best Match
- Add to Selected Assignments

Figure 17 – Reassign Assignment Menu Option

The Reassign page helps schedulers reassign to the right resource by

- Searching for employees by name
- Reassigning to another Staff Level
- Applying the Best Match search using either Cost or Interest

The screenshot shows a 'Reassign' dialog box with a close button (X) in the top right corner. Below the title, there are radio buttons for 'Type': 'Employee', 'Staff Level', and 'Best Match' (which is selected). Under 'Best Match', there are checkboxes for 'Cost' (checked) and 'Interest'. Below this is a table with columns: NAME, AVAILABLE COST, INTEREST, and ACTION. The table lists five employees, each with a profile picture, name, ID, staff level, available cost (32.00), interest level, and an 'Assign' button. The first two employees have an interest level of 1, while the others have 0. A 'Close' button is located at the bottom right of the dialog.






NAME	AVAILABLE COST	INTEREST	ACTION
 Cantwell, Ben (demouser047) 02 - Associate	32.00 1,100.00	1	Assign
 Kassikoff, Phil (demouser012) 02 - Associate	32.00 1,100.00	1	Assign
 Koren, Steven (demouser053) 02 - Associate	32.00 1,100.00	0	Assign
 Kramer, Barbara (demouser01) 02 - Associate	32.00 1,100.00	0	Assign
 McRaney, Gerald	32.00 1,100.00	0	Assign

Figure 18 – Reassign Assignment Options

When the Cost option is selected as above, resources are ordered from lowest cost to highest cost, and their available hours are displayed in green. Resources that match the assignment requirements but do not have availability are displayed in red as you scroll down through the page.

Employee and Project View Swap

You can now toggle between custom Employee and Project views using the new Swap feature. This feature allows you to easily switch your view from employees scheduled on projects in the employee view to the projects the employees are scheduled on in a project view. From the Resource page in either a custom Employee or Project view, click the **Swap** icon:

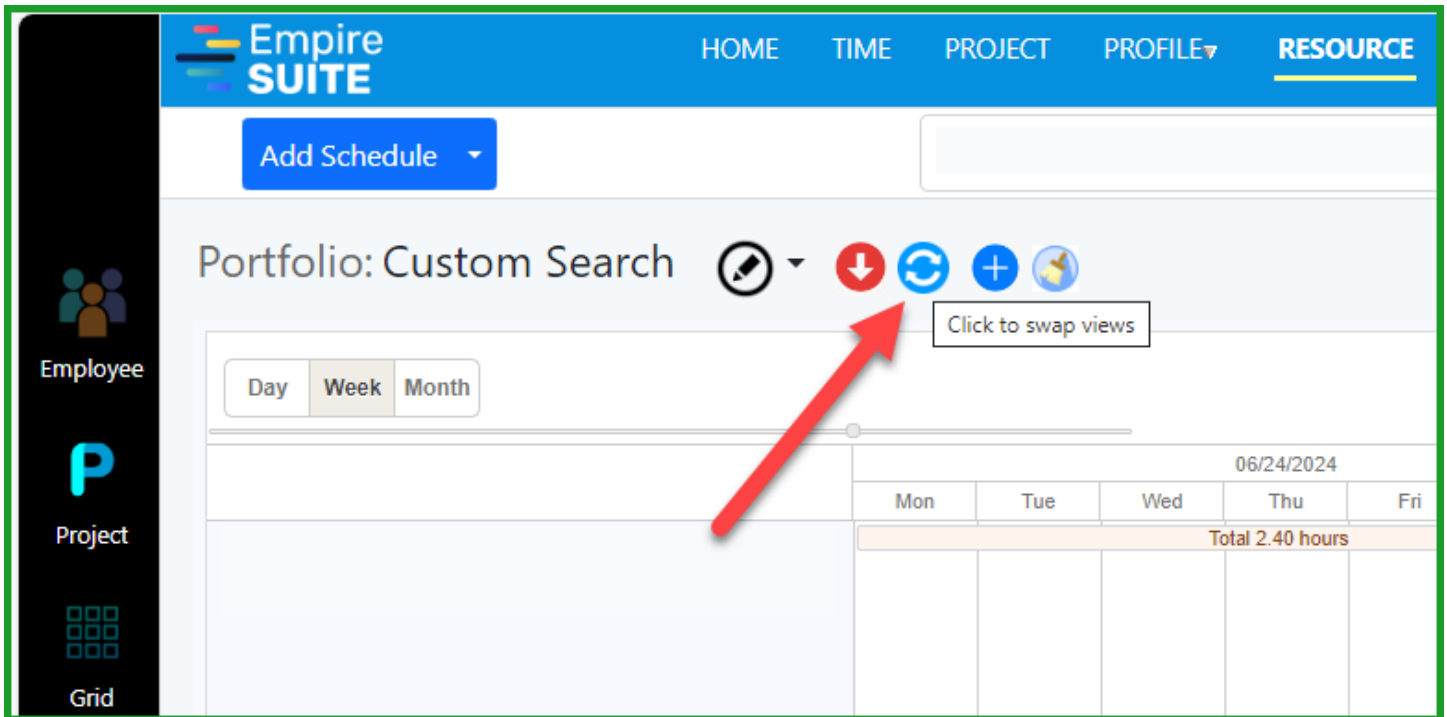


Figure 19 – Employee or Project Custom View Swap Icon

The Swap icon will change the view either an Employee View to a Project view, or from a Project View to an Employee View. For example, if you click Swap from the custom Project View in the Figure 14 screenshot below. . .

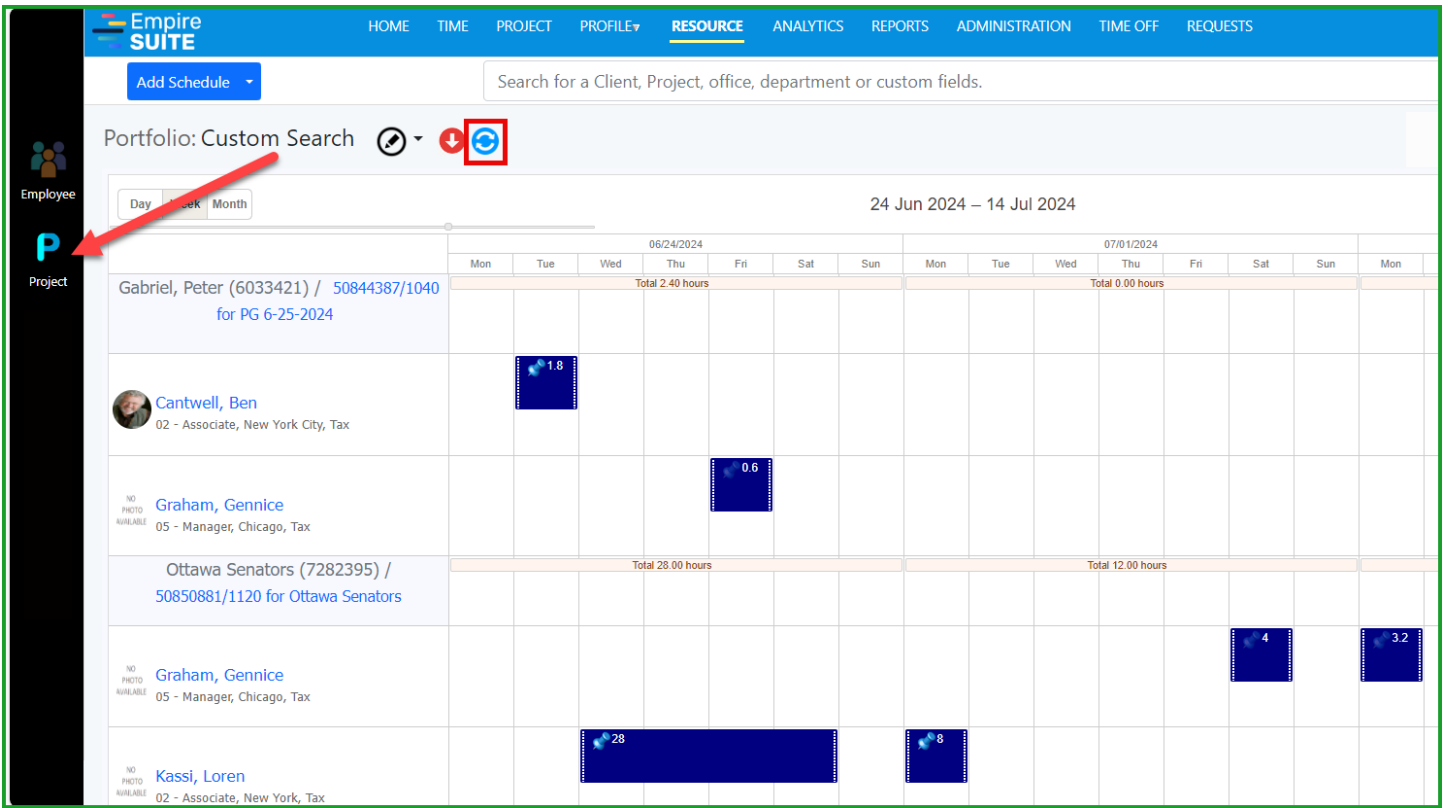


Figure 20 – “Swapping” a Project Custom View

...the employees displayed in the custom Employee view are assigned to:

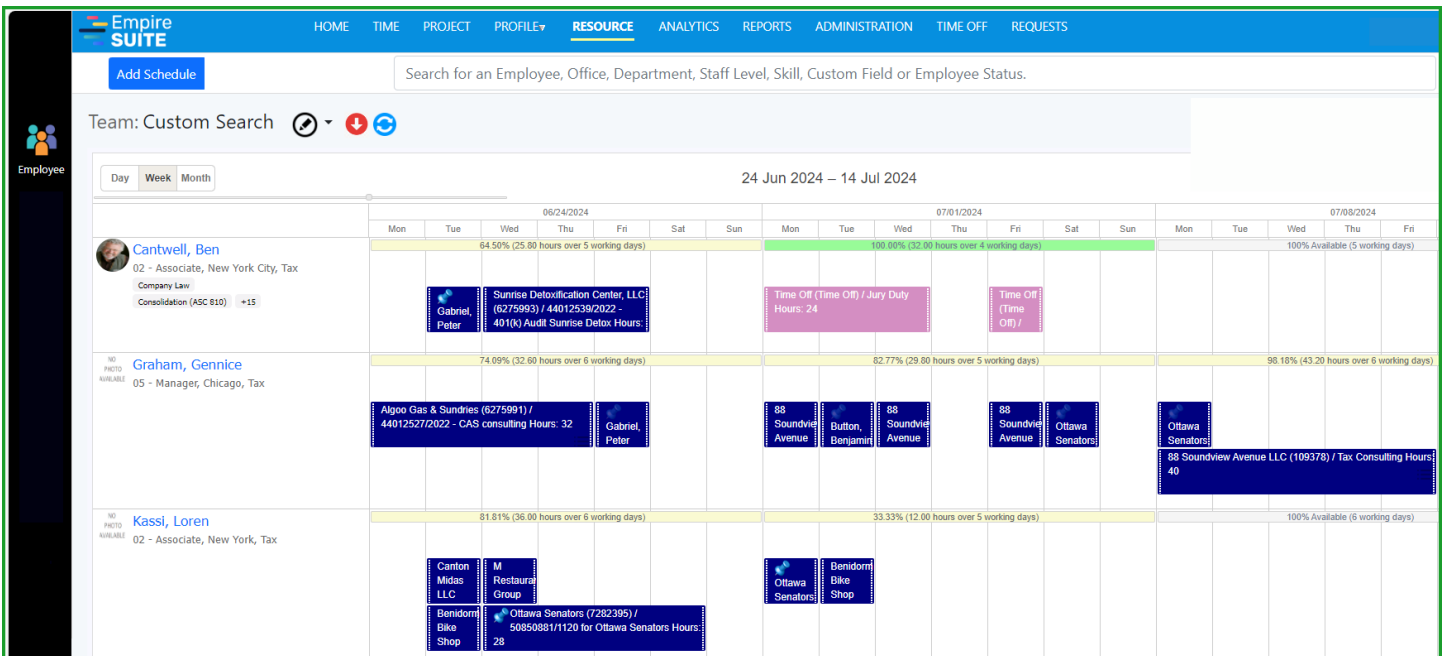


Figure 21 – Employees from the Project Custom View Swap

Staff Levels Only / Match Mode

We've added a Staff Level only mode to make simpler to isolate your staff level assignments for load balancing and reassigning to named resources using Best Match.

From an Employee view – it does not matter whether you are in a Custom View or have selected a Team – click the **Only** link just below the Staff Levels link in the left side view frame:

The screenshot displays the Empire Suite interface with the 'RESOURCE' tab selected. The main view shows a calendar for the period 24 Jun 2024 – 28 Jul 2024. Two employees are listed: Sean Adams and Barbara Kramer. Sean Adams is assigned to 'Business combinations and Purchase Price Allocation (ASC 80)' and '407 Cafe (4941734) / Financial Audit (308800)'. Barbara Kramer is assigned to 'Healthtrax Inc. (22789) / Audit of 401k Plan (5551212)'. The interface includes a search bar, navigation tabs (Home, Time, Project, Profile, Resource, Analytics, Reports, Administration, Time Off, Requests), and a sidebar with various view options. A red arrow points to the 'ONLY' link in the 'Staff Levels' section of the sidebar.

Figure 22 – Staff Levels Only Link

Any employees in the view are removed and only Staff Level assignments remain. If you click the **Match** link. . .

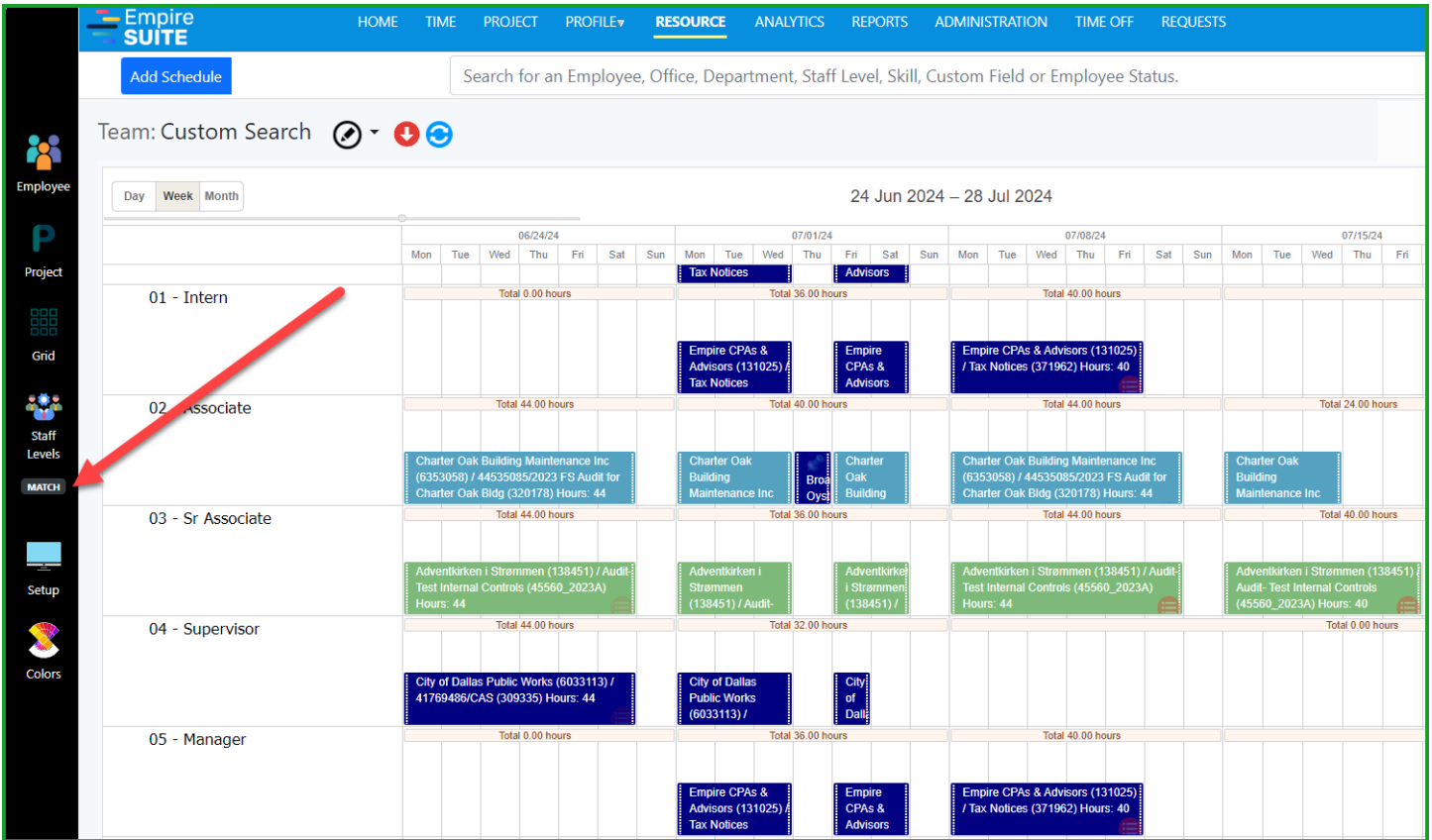


Figure 23 – Staff Level Match Link

...click **OK** to run Best Match immediately, or click **Cancel** to review the selected assignments:

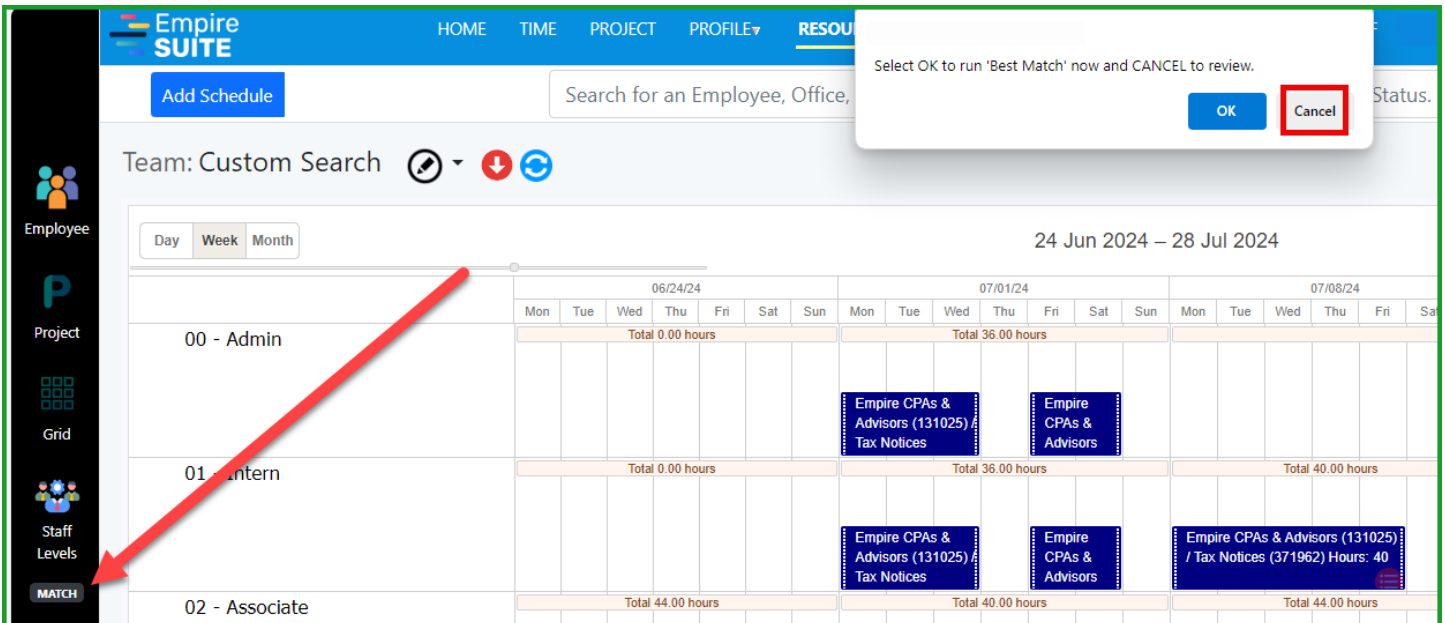


Figure 24 – Match Options

Click **Start Best Match and Save** to launch the Best Match process, or click **Cancel Selected Assignments** to remove the assignments and start over:

Best Match Analytics x

Travel Distance

Office to Employee Home

No Limitation

Cost

✓

\$35,640 Cost

\$61 Average Per Hr

Optimize Cost

Interest

1 with Interest

0 Skills

Prioritize Employee Interest

Start Best Match and Save **Cancel Selected Assignments**

	Employee/Staff Level	Client/Project	Scheduled Dates	Scheduled Hours
Remove	00 - Admin	Empire CPAs & Advisors (131025) / Tax Notices (371962)	07/01/24 - 07/06/24	36.00
Remove	01 - Intern	Empire CPAs & Advisors (131025) / Tax Notices (371962)	07/01/24 - 07/12/24	76.00
Remove	02 - Associate	Charter Oak Building Maintenance Inc (6353058) / 44535085/2023 FS Audit for Charter Oak Bldg (320178)	06/24/24 - 07/17/24	148.00
Remove	03 - Sr Associate	Adventkirken i Strømmen (138451) / Audit- Test Internal Controls (45560_2023A)	06/24/24 - 07/19/24	164.00
Remove	04 - Supervisor	City of Dallas Public Works (6033113) / 41769486/CAS (309335)	06/24/24 - 07/05/24	76.00
Remove	05 - Manager	Empire CPAs & Advisors (131025) / Tax Notices (371962)	07/01/24 - 07/12/24	76.00

Figure 25 – Start Best Match or Cancel

When the Best Match process is finished, click **Start Over** to try again or click **Reverse Best Match** to remove the assignments and revert to the original Staff Level Assignments:

Best Match Analytics x

Travel Distance

Office to Employee Home

No Limitation

Cost

✓

\$35,640 Cost

\$35,640 New Cost

\$61 Average Per Hr

Optimize Cost

Interest

1 with Interest

0 Skills

Prioritize Employee Interest

Start Over **Reverse Best Match**

Employee/Staff Level	Client/Project	Scheduled Dates	Scheduled Hours																				
00 - Admin	Empire CPAs & Advisors (131025) / Tax Notices (371962)	07/01/24 - 07/06/24	36.00																				
<p> No employees have available hours to complete this assignment. Candidates</p>																							
01 - Intern	Empire CPAs & Advisors (131025) / Tax Notices (371962)	07/01/24 - 07/12/24	76.00																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>NAME</th> <th>Office</th> <th>CAPACITY</th> <th>SCHEDULED</th> <th>AVAILABLE</th> <th>COST</th> <th>REQUIREMENTS</th> <th>INTEREST</th> <th>DISTANCE</th> <th>ACTION</th> </tr> </thead> <tbody> <tr> <td> Hanson, Karen (demouser004) 01 - Intern</td> <td>New York City Audit</td> <td>76.00</td> <td>44.00</td> <td>32.00</td> <td>3,420.00</td> <td>Yes</td> <td>0</td> <td>0</td> <td>Reverse Candidates</td> </tr> </tbody> </table>	NAME	Office	CAPACITY	SCHEDULED	AVAILABLE	COST	REQUIREMENTS	INTEREST	DISTANCE	ACTION	Hanson, Karen (demouser004) 01 - Intern	New York City Audit	76.00	44.00	32.00	3,420.00	Yes	0	0	Reverse Candidates			
NAME	Office	CAPACITY	SCHEDULED	AVAILABLE	COST	REQUIREMENTS	INTEREST	DISTANCE	ACTION														
Hanson, Karen (demouser004) 01 - Intern	New York City Audit	76.00	44.00	32.00	3,420.00	Yes	0	0	Reverse Candidates														
02 - Associate	Charter Oak Building Maintenance Inc (6353058) / 44535085/2023 FS Audit for Charter Oak Bldg (320178)	06/24/24 - 07/17/24	148.00																				
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NAME	Office	CAPACITY	SCHEDULED	AVAILABLE	COST	REQUIREMENTS	INTEREST	DISTANCE	ACTION														
Enright, Lisa (228143) 02 - Associate	New York Tax	148.00	0.00	148.00	8,140.00	Yes	0	0	Reverse Candidates														

Figure 26 – Best Match Start Over or Reverse

Best Match Without Using the Selected Assignments UI

You can now run Best Match without using the Selected Assignments Best Match menu option. Select the desired assignments using the **new** checkbox feature:

The screenshot displays the Empire Suite interface. At the top, there is a navigation bar with tabs for HOME, TIME, PROJECT, PROFILE, RESOURCE (selected), and ANALYTICS. A search bar is present with the text "Search for an Employee, Office, Department, Staff Le...". Below the search bar, there is a "Team: Custom Search" section with icons for edit, refresh, and a dropdown arrow. The main area shows a calendar for 07/08/2024. The calendar has columns for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. On the left, there is a list of resources: 00 - Admin, 01 - Intern, 02 - Associate, 03 - Sr Associate, and 04 - Supervisor. For each resource, there is a row in the calendar. A red box highlights three rows in the calendar, each with a blue checkbox and the text "Binford Tools (220511) / Financial Statement Audit" or "Binford Tools (220511) / Financial Statement Audit Hours: 44". To the right of the calendar, there is a "Selected Assignments" section with a yellow bar showing "3" assignments. Below this, there is a "Today" section with a calendar icon and navigation arrows.

Figure 27 – Best Match Selected Assignments

Click the down arrow to the right of Selected Assignments:

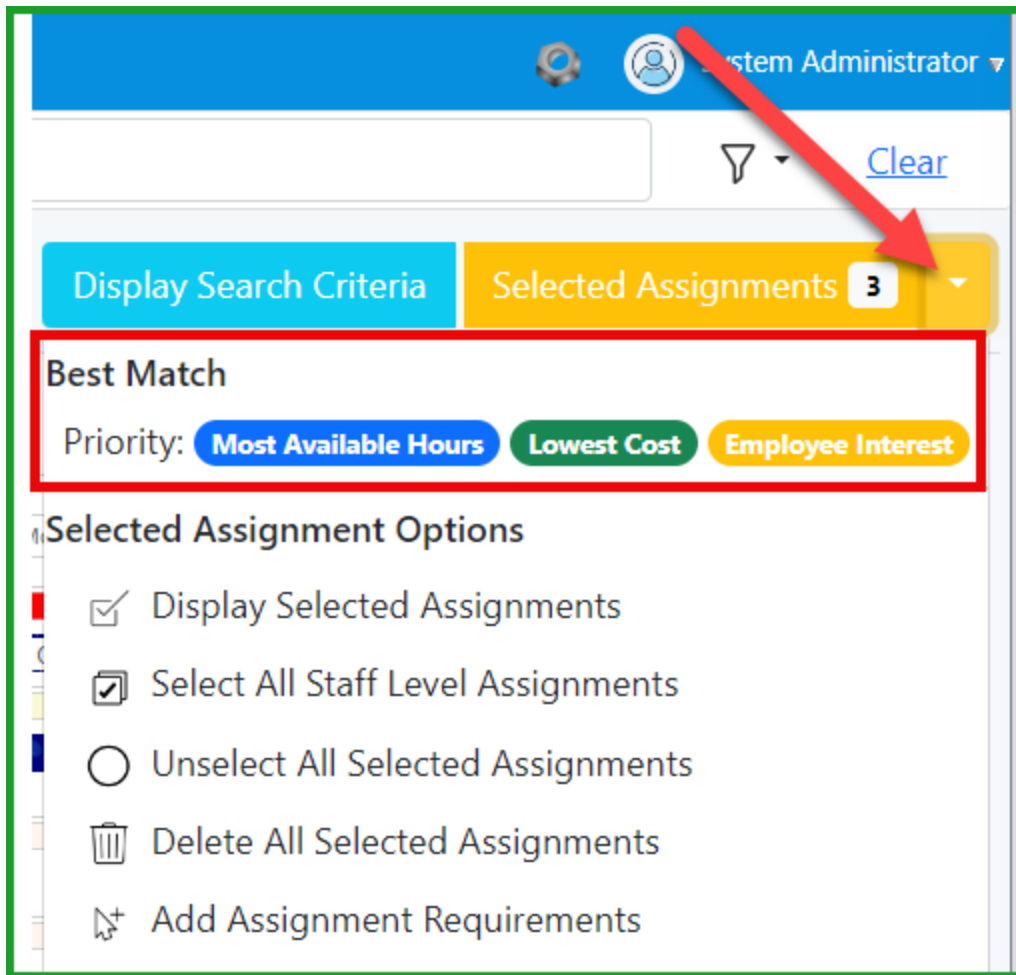


Figure 28 – Best Match Options

Then select the desired priority for your desired Best Match operation:

- Most Available Hours
- Lowest Cost
- Employee Interest

Updated Employee Profile Page

We've updated and improved the Employee Profile page. From an Empire RESOURCE Employee view, click the employee name hyperlink:

Empire SUITE

HOME TIME PROJECT PROFILE RESOURCE ANALYTICS REPORTS ADMINISTRATION

Add Schedule

Search for an Employee, Office, Department, Staff Level, Skill, Custom Field or Emp

Team: Custom Search

Day Week Month

17 Jun 2024 – 21 Jul 2024

06/17/24

06/24/24

Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed

Adams, Sean

200.00% (80.00 hours over 5 working days)

165.00% (66.00 hours over 5 working days)

100% Avail

Business combinations and Purchase Price Allocation (ASC 805)

Business combinations and Purchase Price Allocation (ASC 805)

ACI Clinical (4941623) / Merger & Acquisition Services (462437) Hours: 44

Bally's Corporation (6033104)

Adventistkirken Betel (138452) / 2023 Internal Audit (AdvkirIntAud23) Hours: 36

407 Cafe (4941734) / Financial Audit (308800) Hours: 44

Employee

Project

Grid

Figure 29 – Employee Profile Link

Employee Profile information, as well as Industry experience, Skills and Interests are displayed on one scrollable page:



Adams, Sean (195625)

Chicago

Assignments

Employee Profile

Start Date	01/01/21
End Date	Current
Staff Level	02 - Associate
Office	Chicago
Department	Tax
Employee Type	Employee
Reports To	Ash, Katy

Email Address sean.adams@wsg.com

Industry

Description	Ranking	Interest
Aviation & Transport \Air Transportation	Advanced	Expert
Aviation & Transport \Leasing	Basic	Intermediate
Consumer Business \Consumer Product Manufacturing	Intermediate	Intermediate
Consumer Business \Consumer Services	Intermediate	Intermediate
Consumer Business \Hospitality: Gaming & Casinos	Basic	Basic
Consumer Business \Retail, Wholesale & Distribution	Intermediate	Intermediate
Energy & Resources \Oil & Gas	None	None

Figure 30 – Employee Profile Page

Click the **Assignments** link to see a list of the selected employee’s assignments:

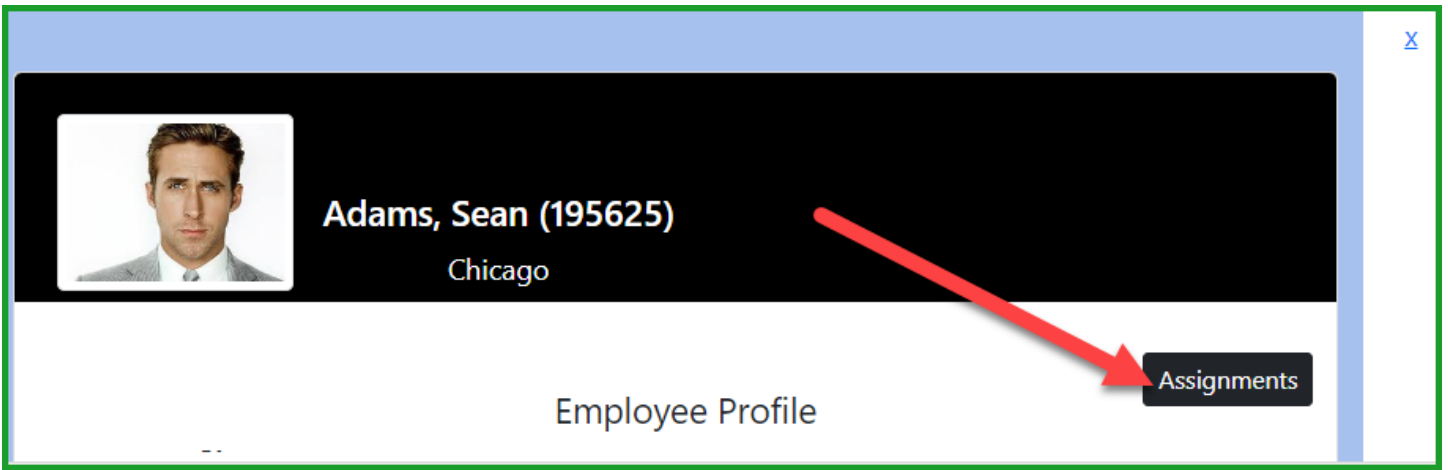


Figure 31 – Employee Profile Page Assignments Link

Click the **Hide Assignments** link to return to the Employee Profile page:

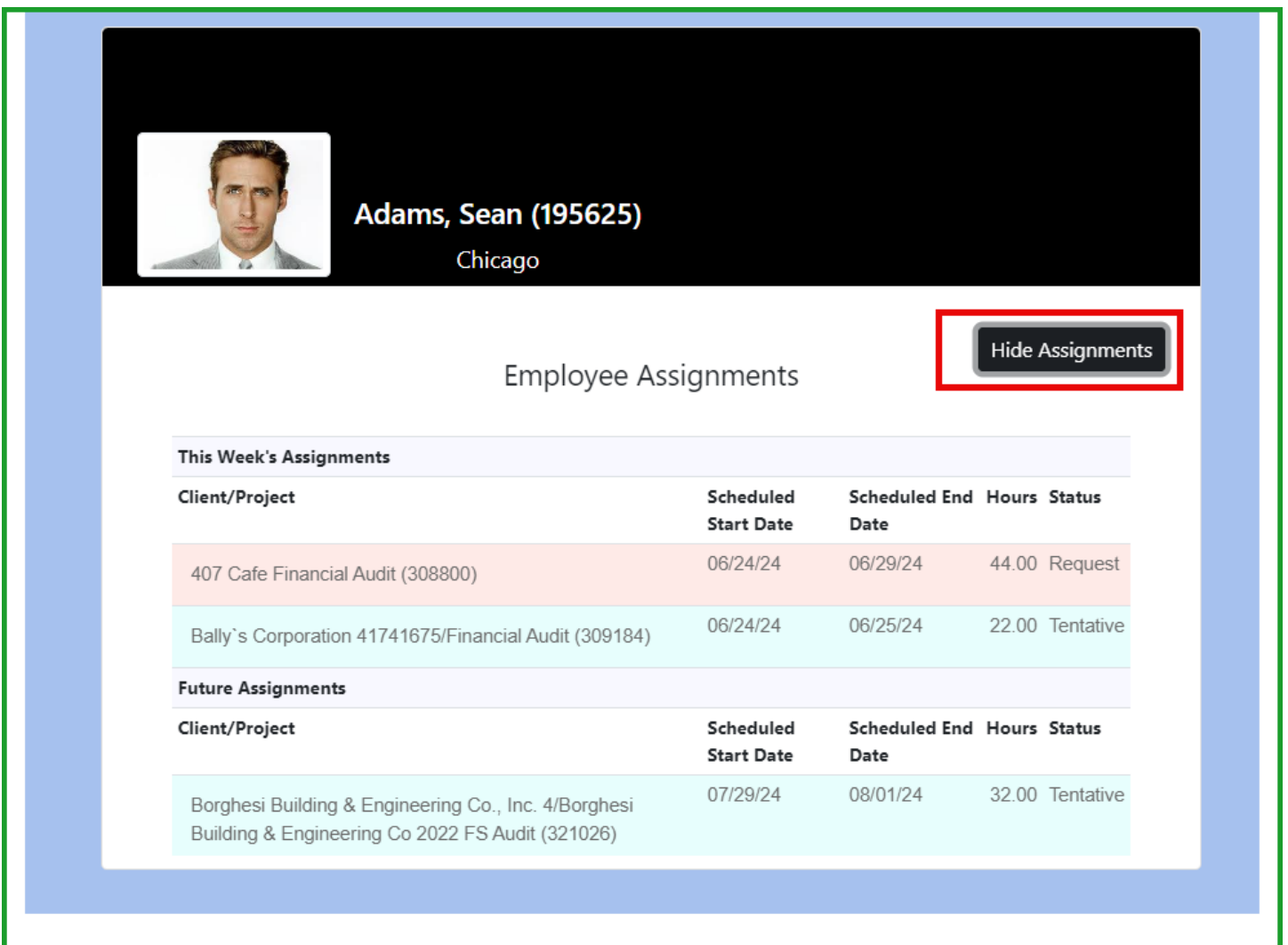


Figure 32 – Employee Profile Page Assignments and Hide Assignments Link

Improved Resource Copy

The Resource Copy feature now includes Source Project Assignment Requirements when the requirements are defined.

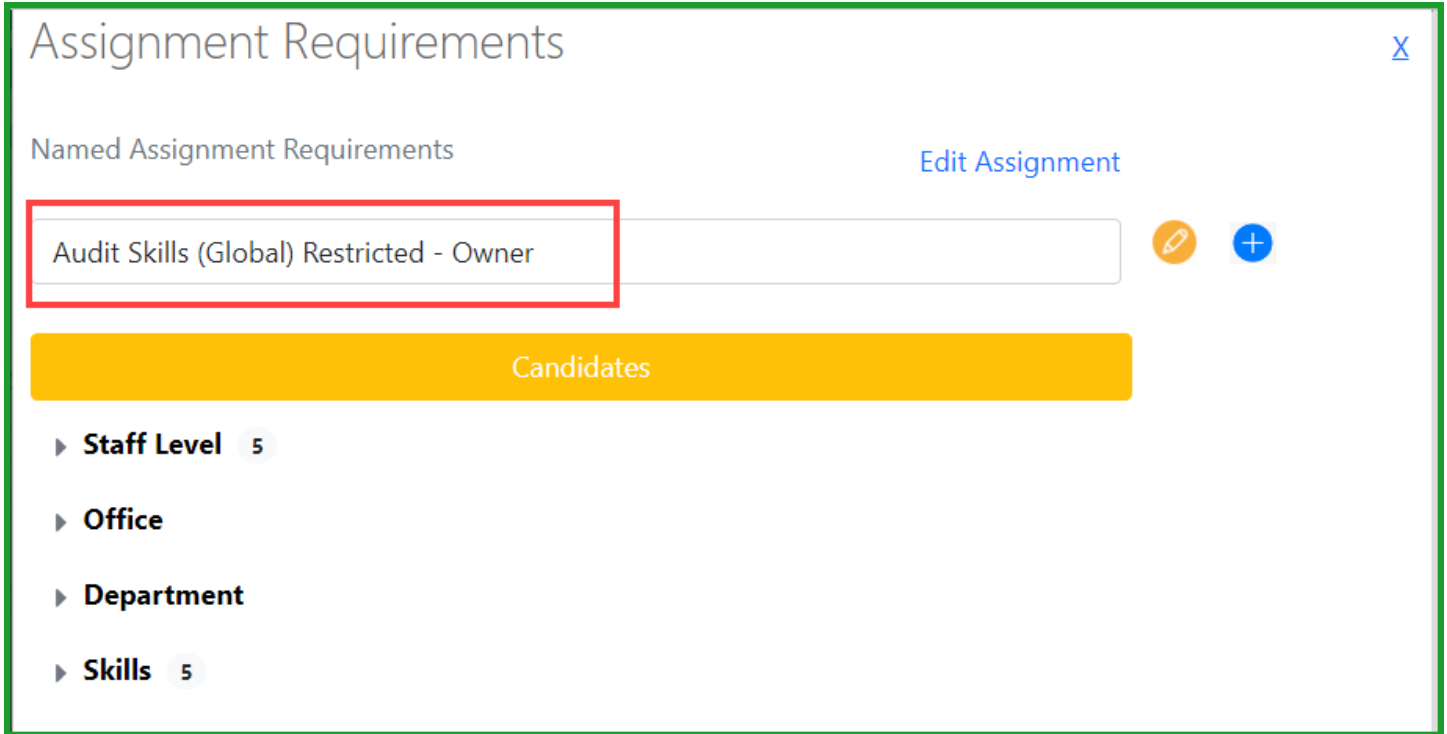


Figure 33 – Resource Assignments Requirements Copy

Practice Engine Integration Improvements

Combined Practice Engine Menu Option

We've updated the Practice Engine Integration menu option to include all four pages in one page with four different tabs:

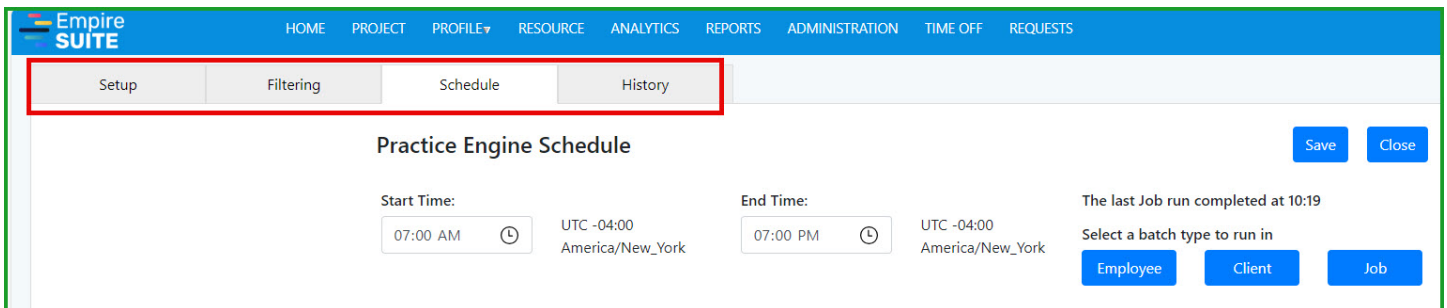


Figure 34 – Practice Engine Integration Page Tabs

The Practice Engine Batch History has been updated also. You can search by batch type, batch status and date range. You can also export batch results to Excel:

Setup Filtering Schedule History

Practice Engine History Close

Search

Batch Status: All Date Range: 4/25/2024 - 5/2/2024 Type: Employee Search Export

Batch #	Type	Batch Status	Time (UTC-04:00) America/New_York	Total Row Count	Total Hours	Success Count	Success Hours	Filtered Out Count	Filtered Out Hours	Error Count	Errors Hours	Warning Count
95	Employee	Completed	5/2/24, 09:29	28	-	12	-	16	-	0	-	0

< 1 >

Figure 35 – Practice Engine Integration Batch History

Practice Engine Actual Time Entry Download into Empire SUITE

You can now download actual time entries from Practice Engine into Empire SUITE. If you are a Practice Engine integration-based account, please contact WSG for additional information on configuring this integration

New Resource-Related Email Messages

The existing 'Upcoming Schedule' email didn't include the current week's assignments, so we've added a 'Current Week Schedule' system generated email which does include the current week's assignments. We also changed the 'Upcoming Availability' email to include all assignments statuses – Approved, Tentative and Requests.

Current Week Schedule

admin@empiresuite.com
To: wsgdemo, testuser Reply Reply All Forward ... Fri 3/29/2024 2:00 PM

Adams, Sean - Current Week Schedule

Week of March 24, 2024

Client\Project	Category	Location	Sun 03/24	Mon 03/25	Tue 03/26	Wed 03/27	Thu 03/28	Fri 03/29	Sat 03/30	Total
Hoffman, Joel (6299572) 44921669/9/11 test again (321673)				10.00						10.00
Total Scheduled				10.00						10.00
Total Expected				10.00	10.00	10.00	10.00	10.00		50.00
Total Available					10.00	10.00	10.00	10.00		40.00

Figure 36 – Current Week Schedule Email