# What's New in Empire® SUITE July 2024?

# 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

- 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 Axcess 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:

Figure 1 – Edit Workflow Menu Option

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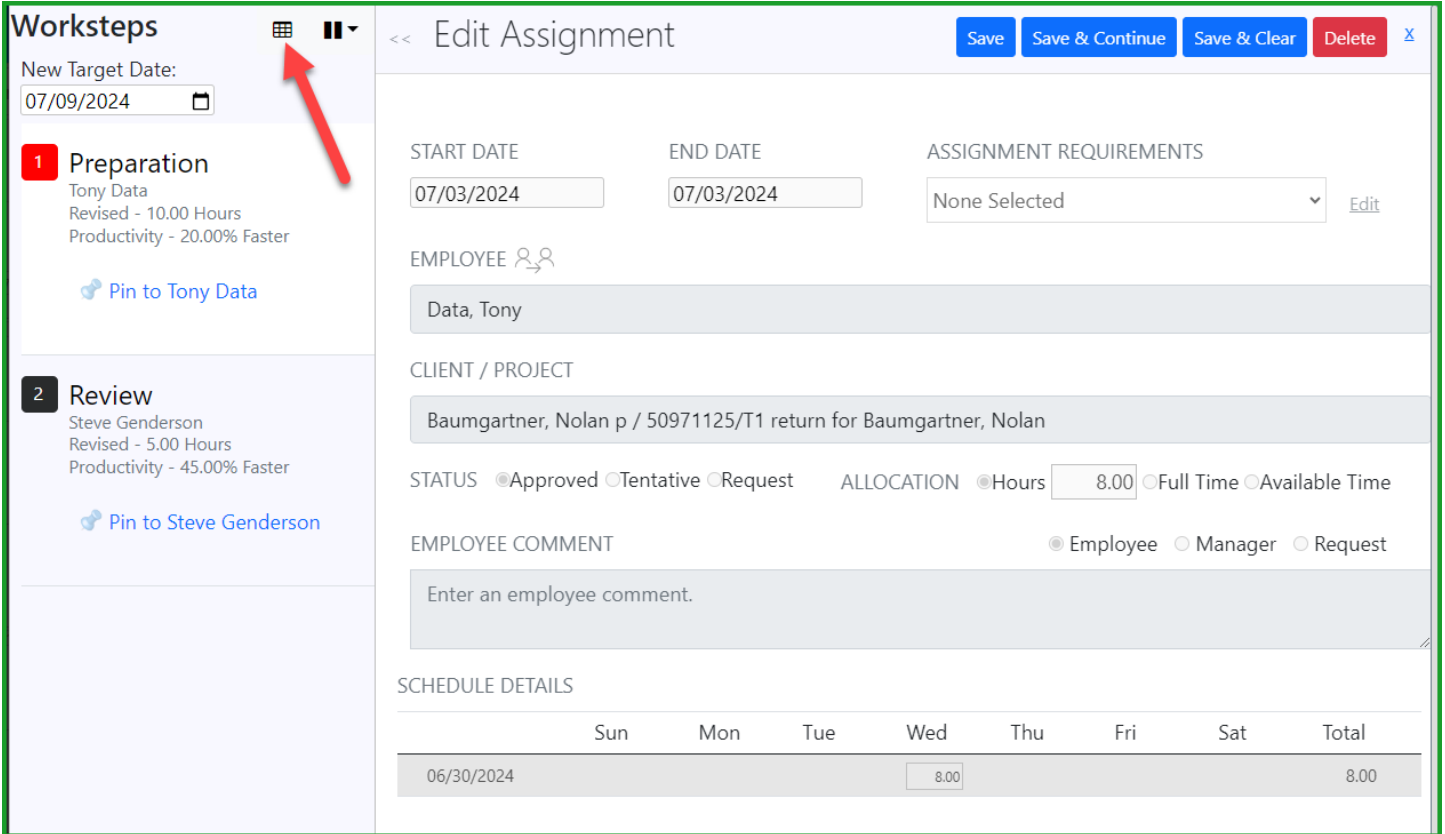


Figure 2 – Edit Workflow Details Option

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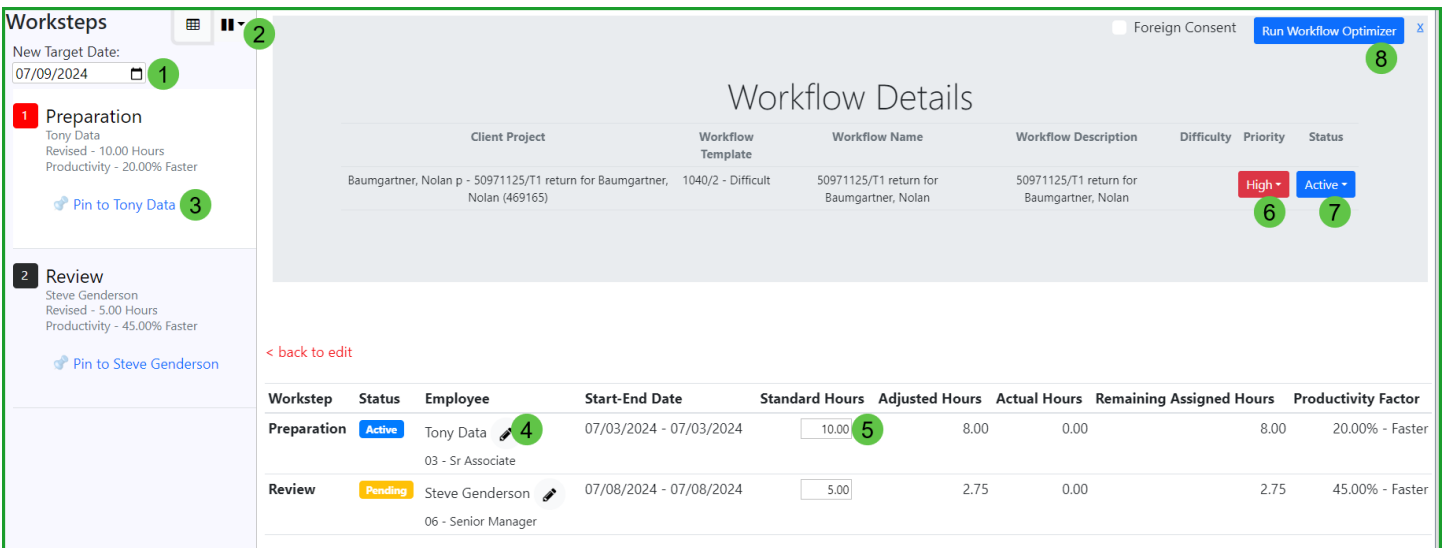


Figure 3 – Editing the Workflow Details

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:



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:
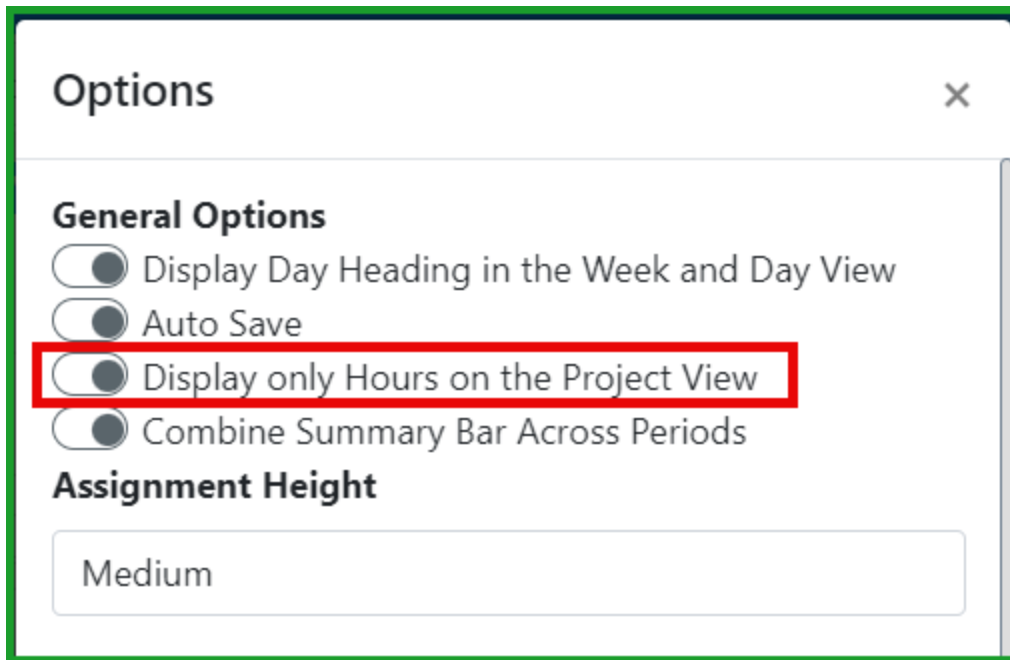
Figure 5 – Display Hours in the Project View Menu Option



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:
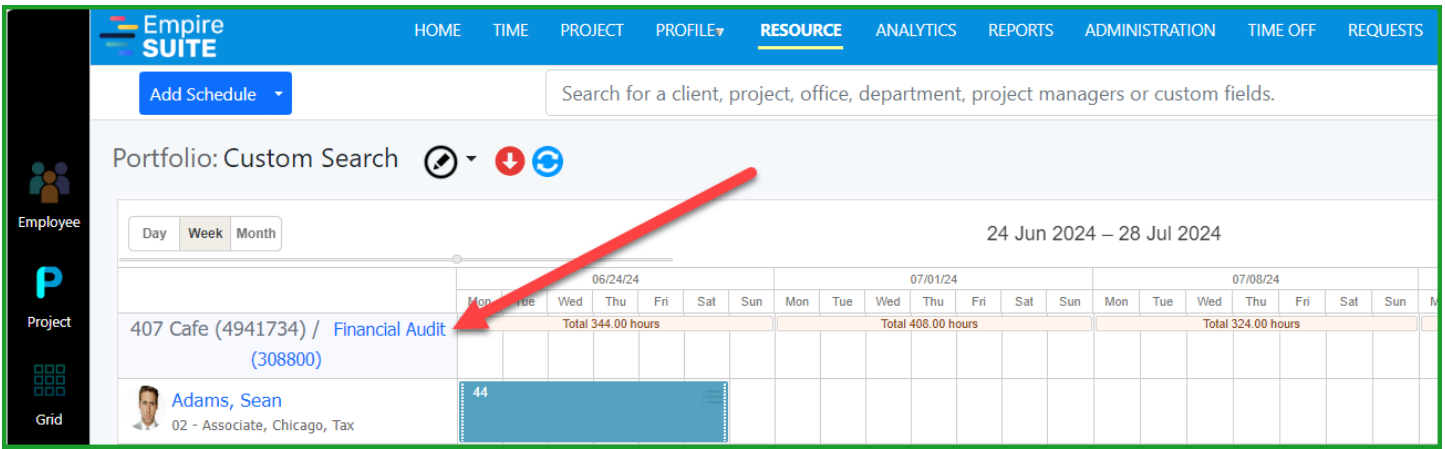
Figure 7 – Project Information Link

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:
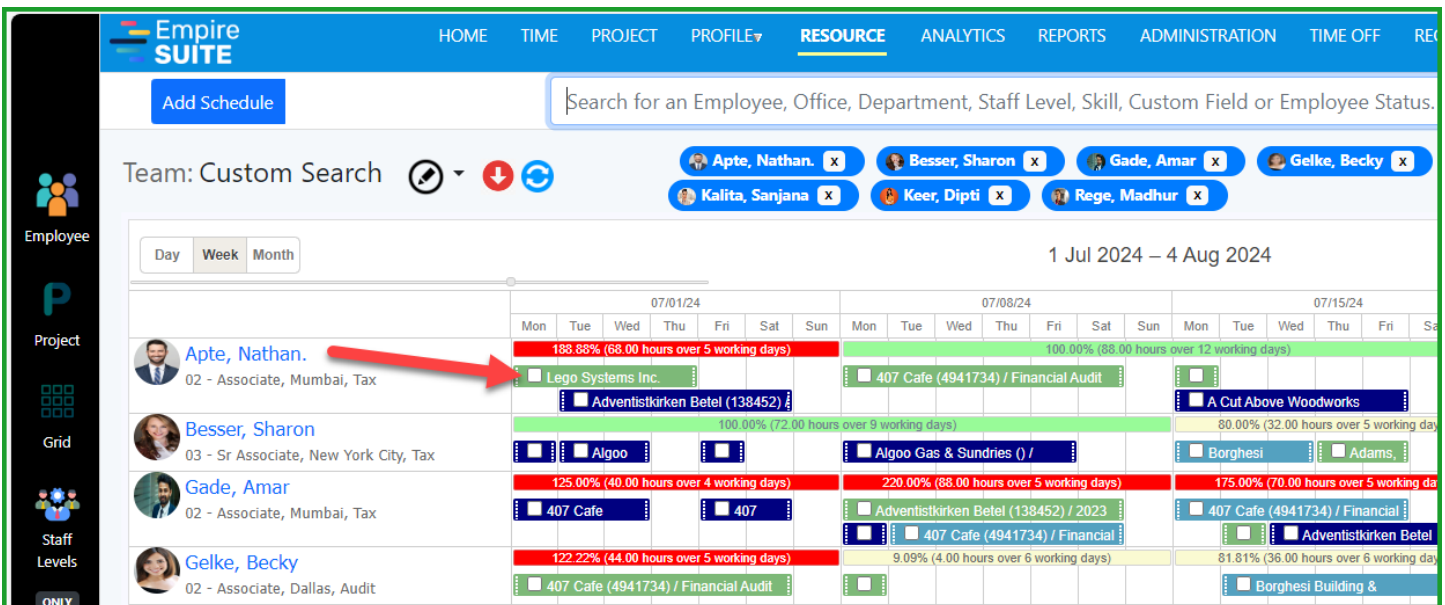


Figure 8 – Assignment Automation Checkbox

We've also replaced the gear icon with a green check mark when selecting all assignments for an employee or a project for automation:
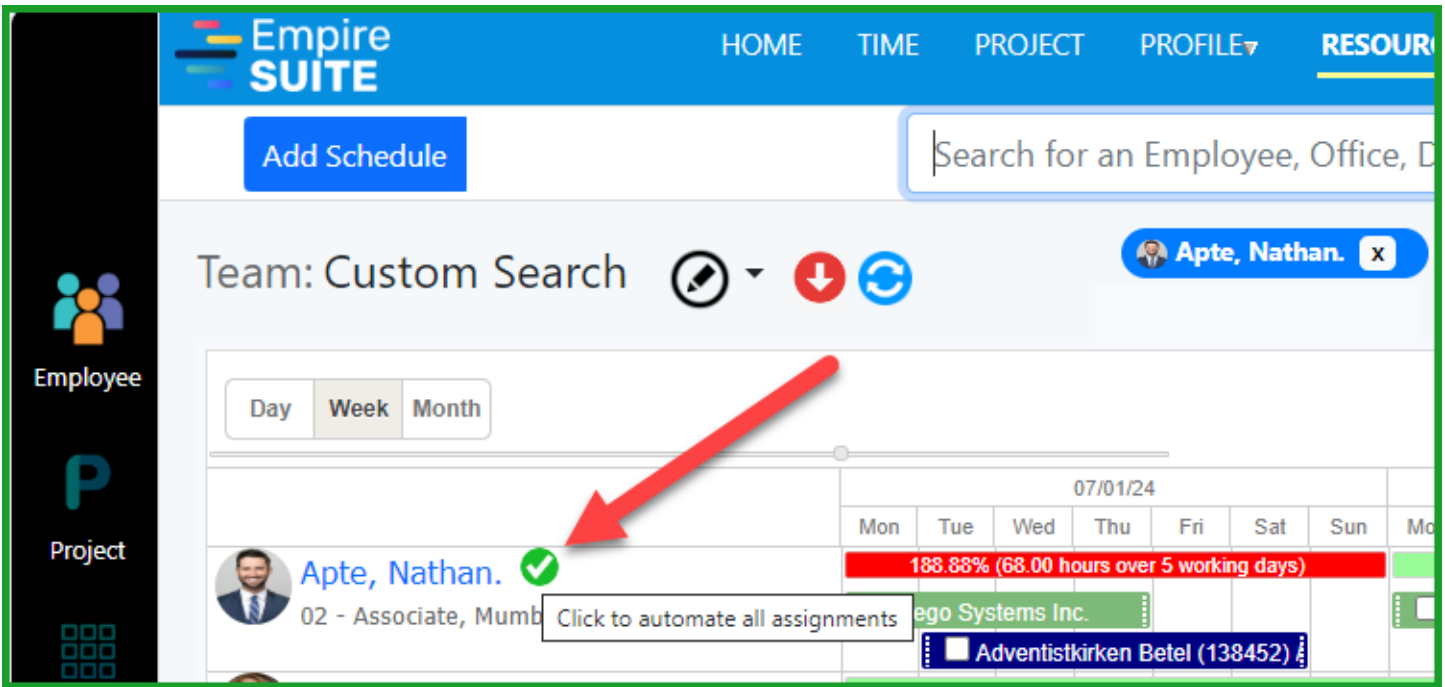
Figure 9 – Employee or Project Automate All Assignments Icon

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

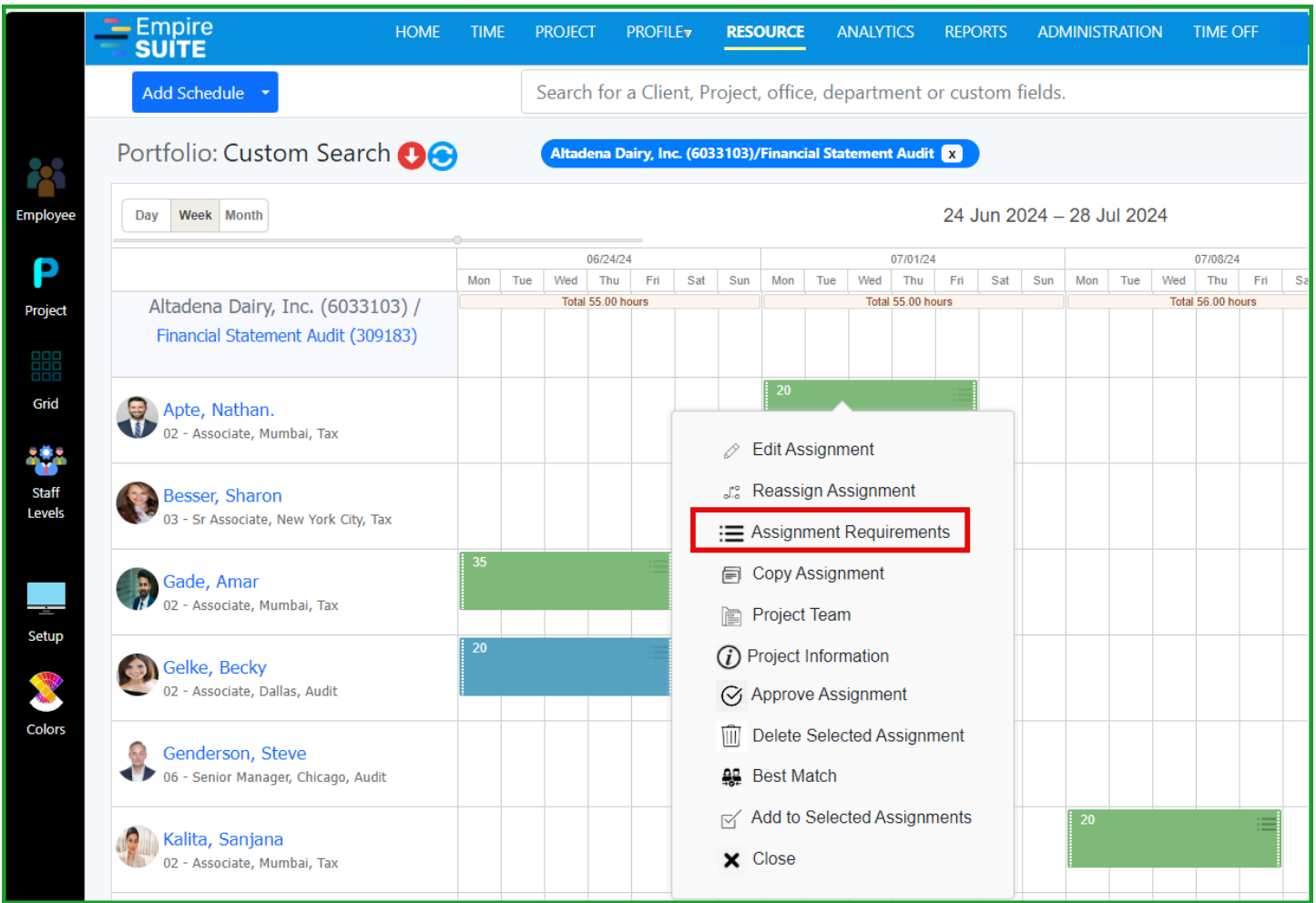Assignment Requirements is now available as a menu option:

Figure 10 – Assignment Requirements Menu Option

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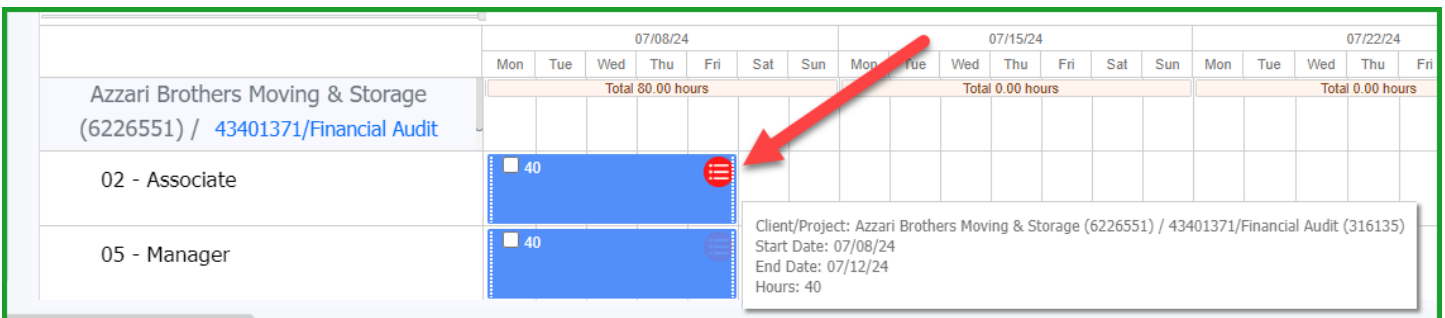


Figure 11 – Assignment Requirements Link

If you select the menu option or click the link, you'll see a completely revamped and updated Assignment Requirements page:
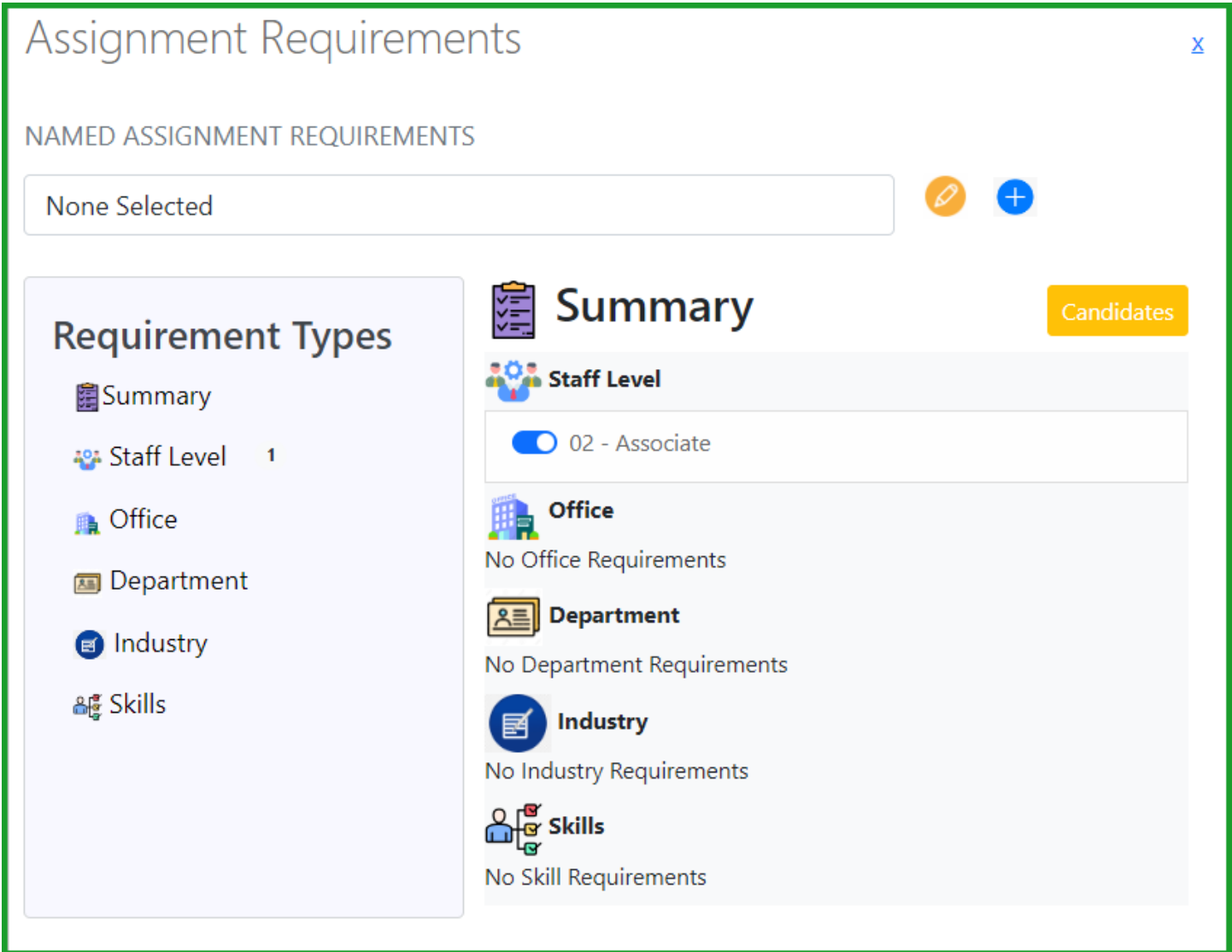
Figure 12 – Updated Assignment Requirements Page

## 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:
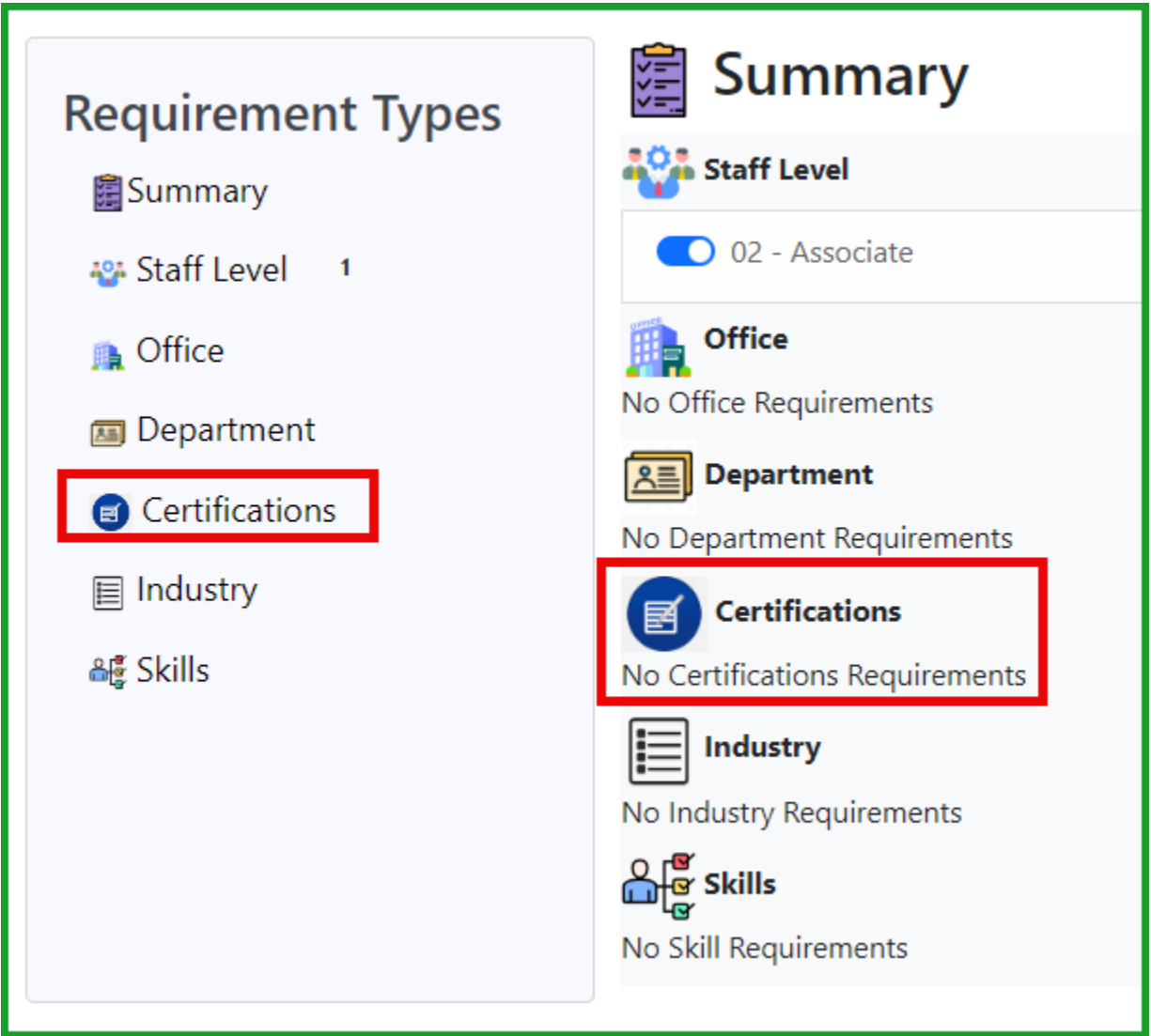
Figure 14 – Additional Profile Types

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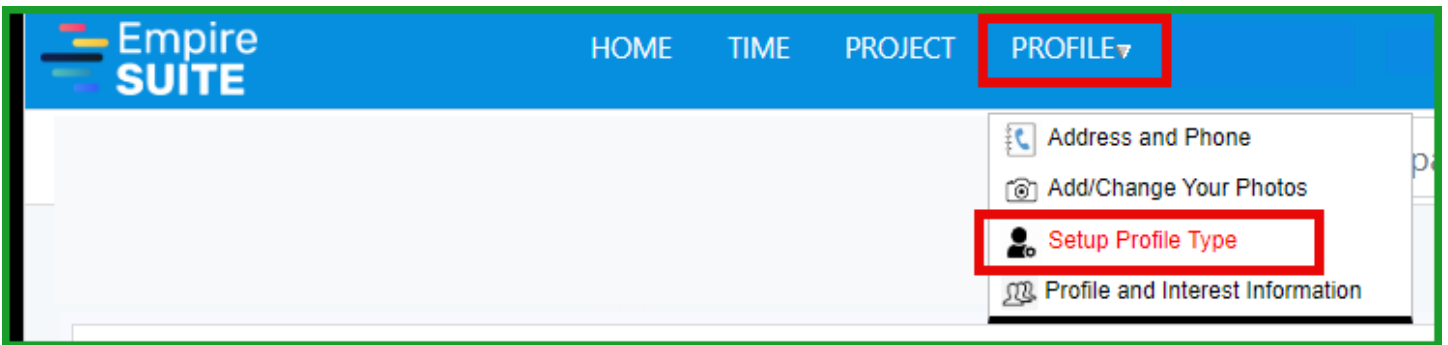


Figure 15 – Setup Profile Types

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

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**:

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



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:
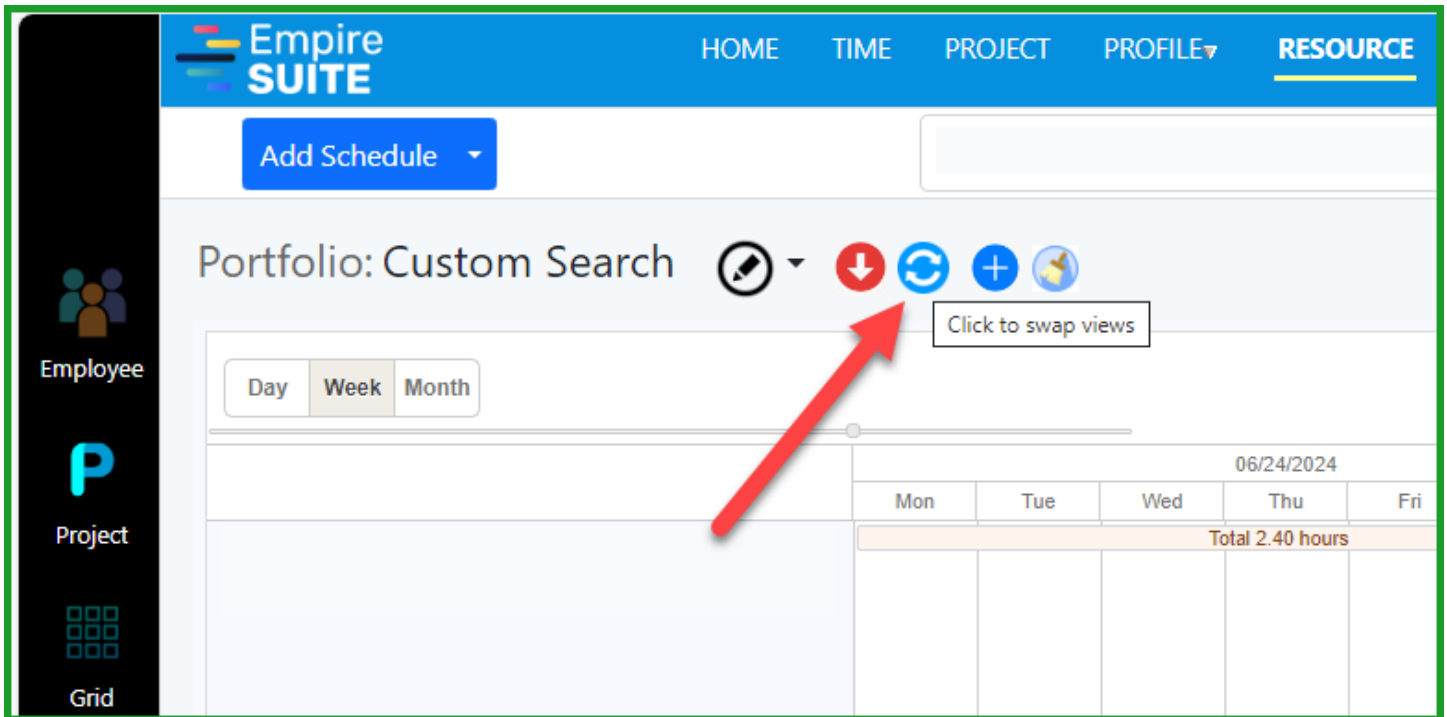


Figure 19 – Employee or Project Custom View Swap Icon

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. . .
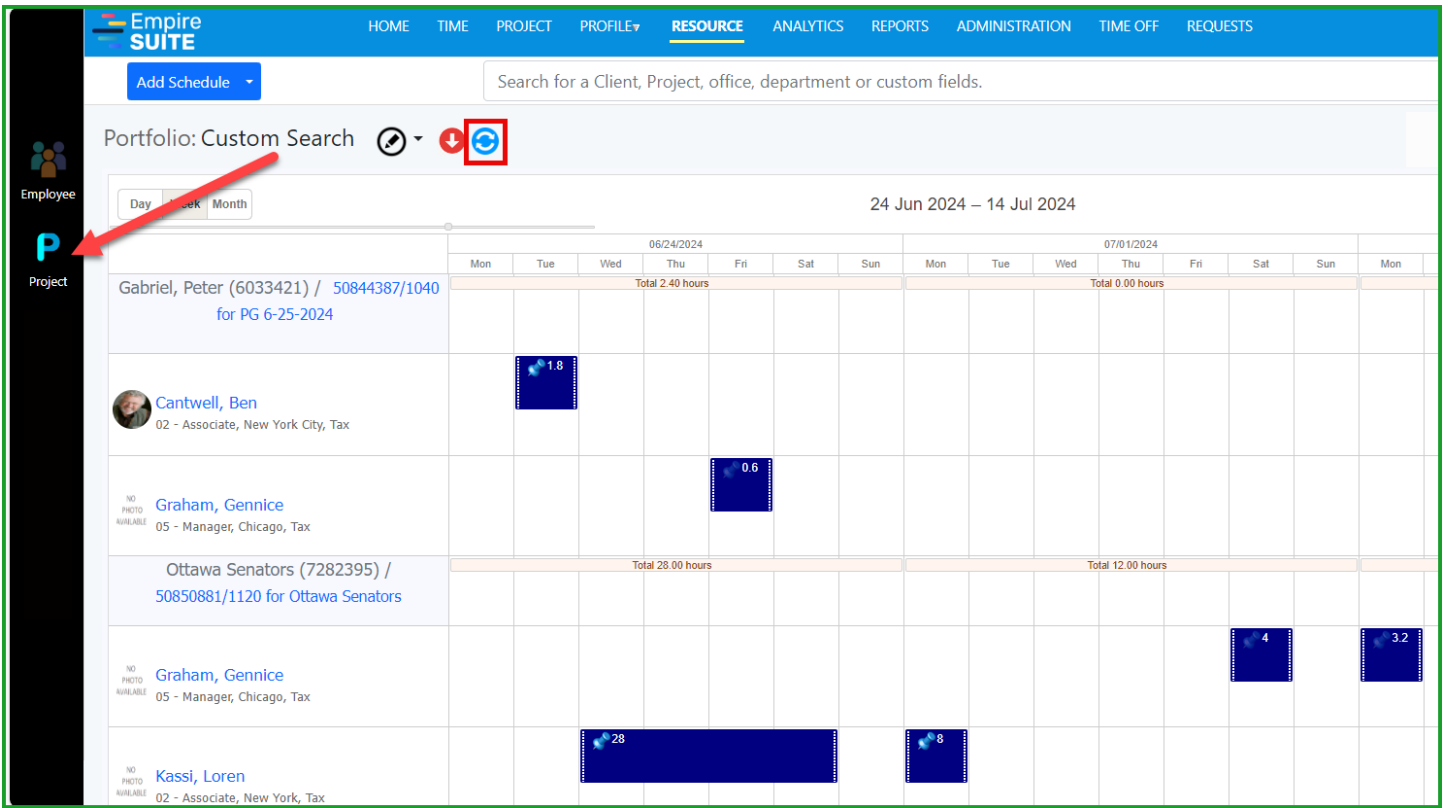
Figure 20 – "Swapping" a Project Custom View

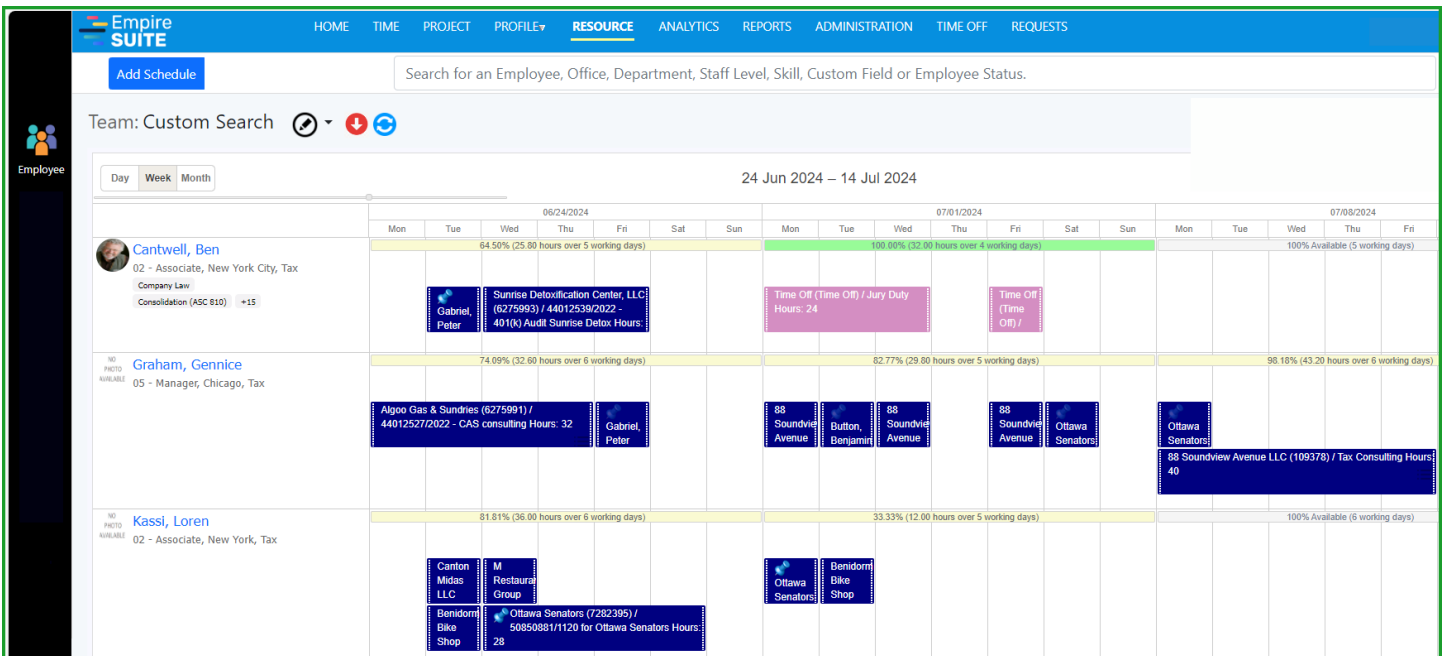. . .the employees displayed in the custom Employee view are assigned to:



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:



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. . .
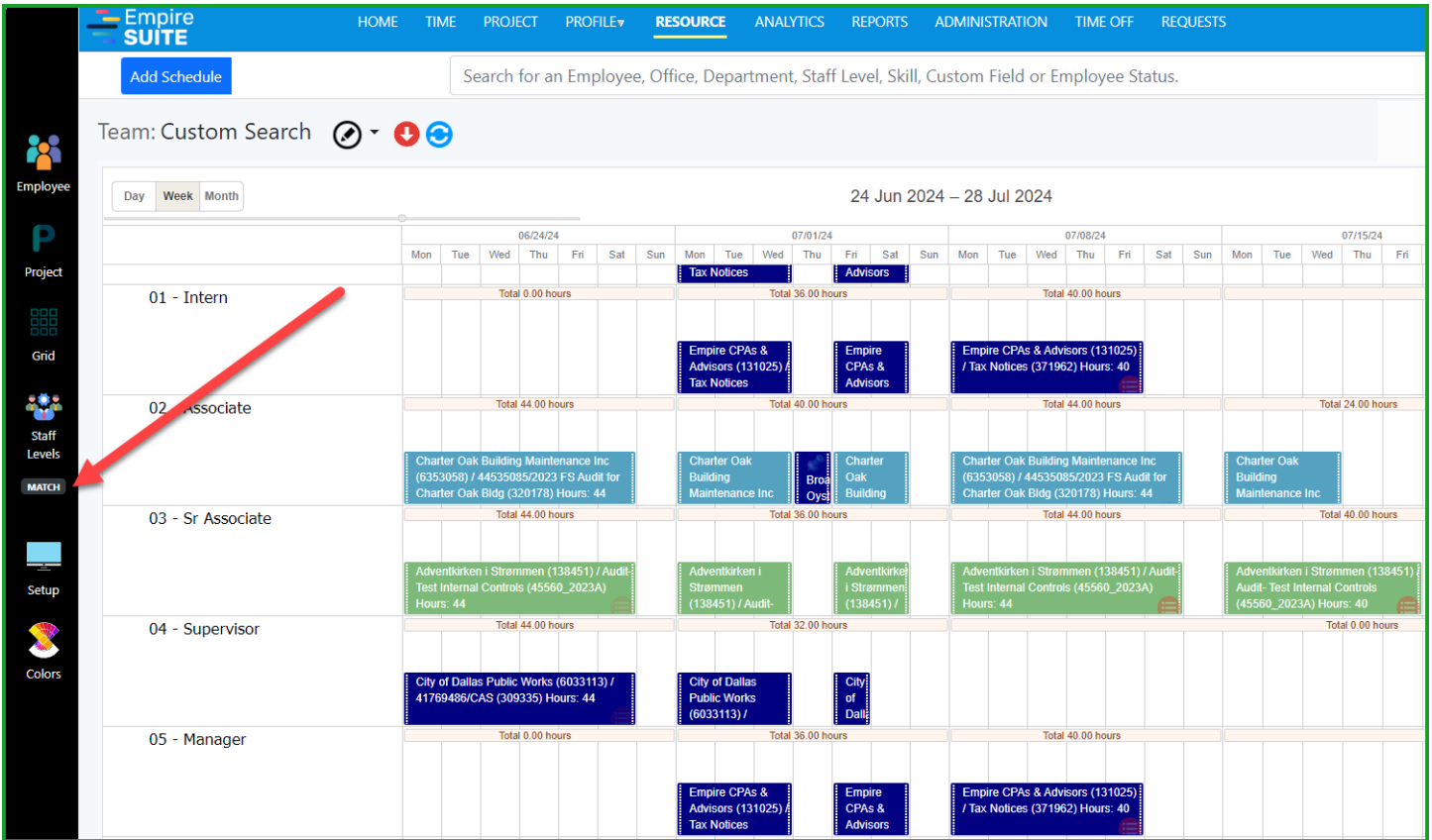
Figure 23 – Staff Level Match Link

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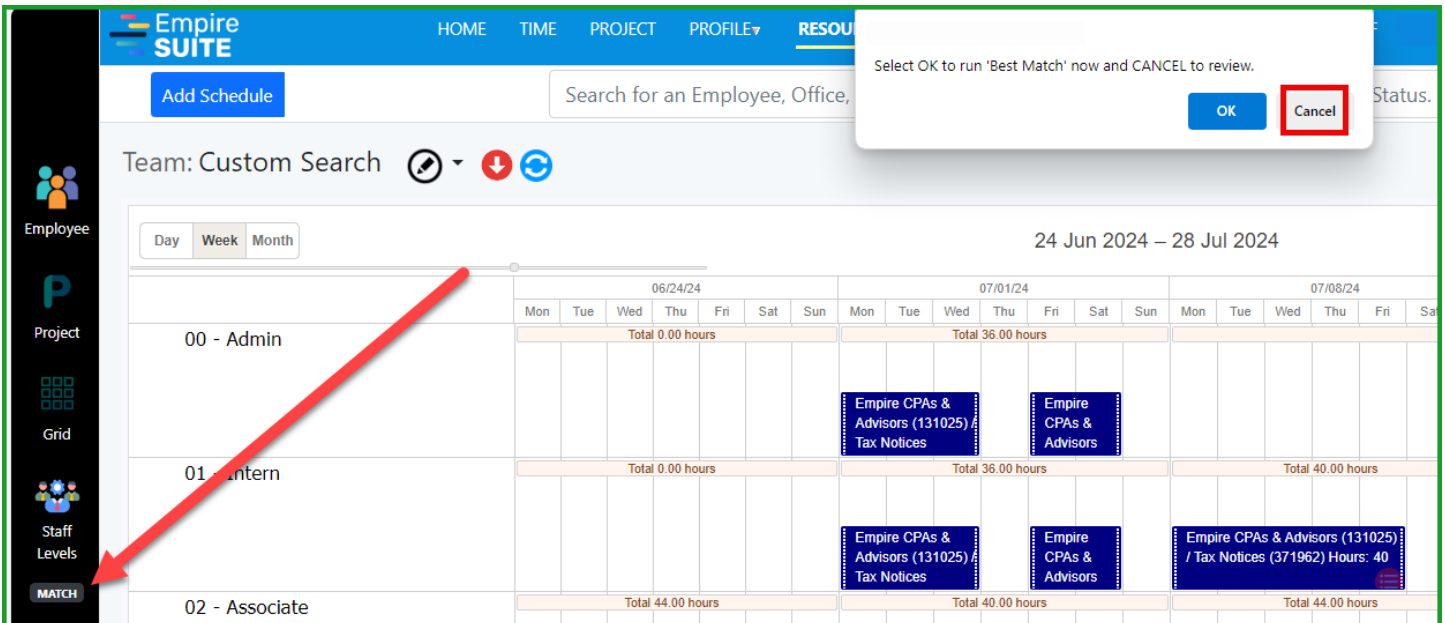


Figure 24 – Match Options

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

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:



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:



Figure 27 – Best Match Selected Assignments

Click the down arrow to the right of Selected Assignments:
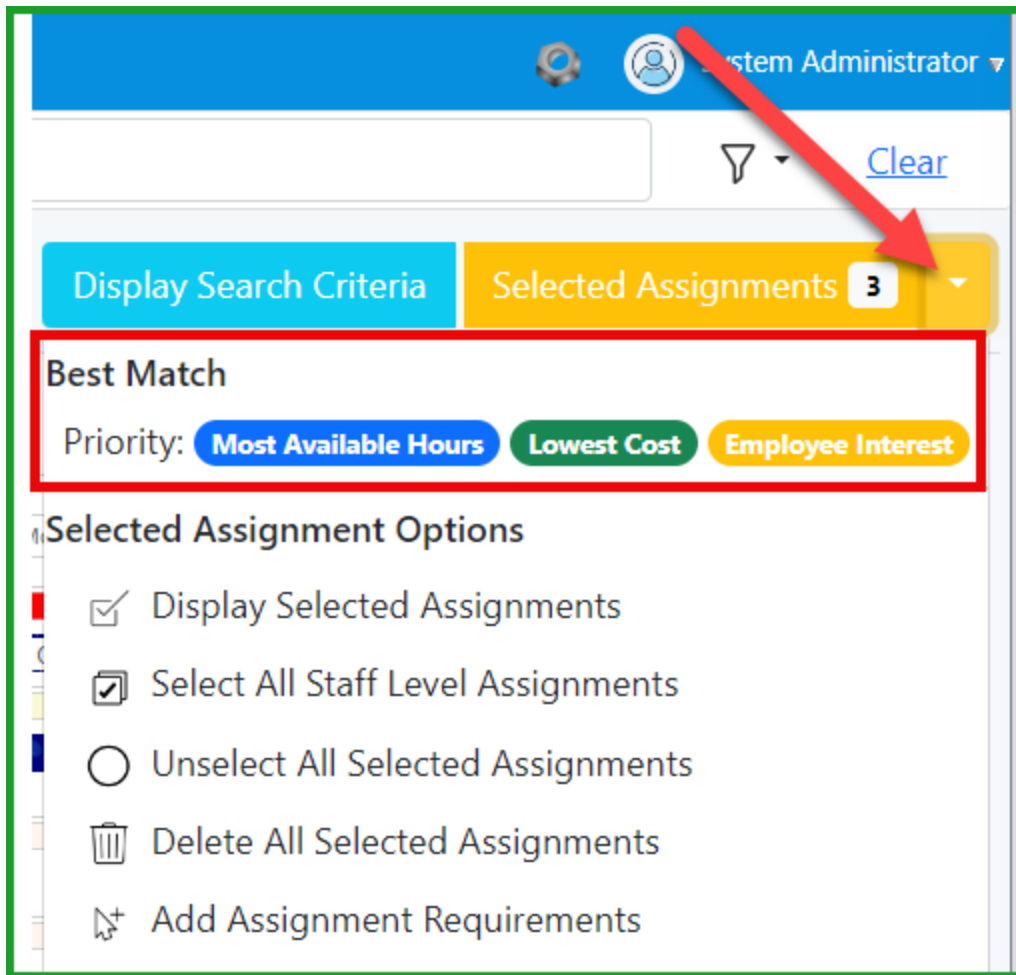
Figure 28 – Best Match Options

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:

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

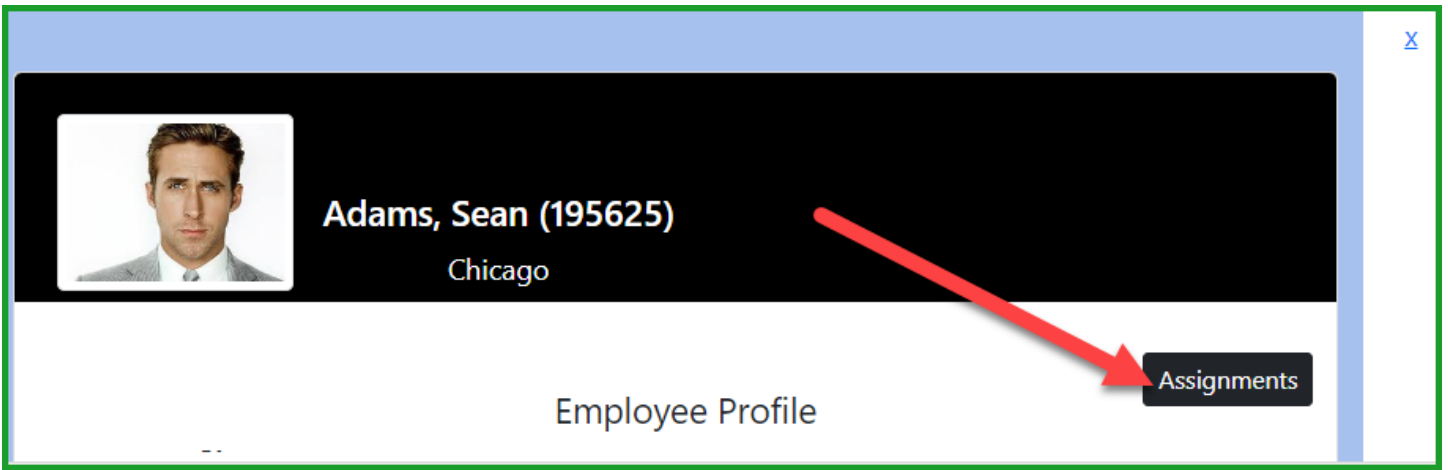Click the **Assignments** link to see a list of the selected employee's assignments:

Figure 31 – Employee Profile Page Assignments Link

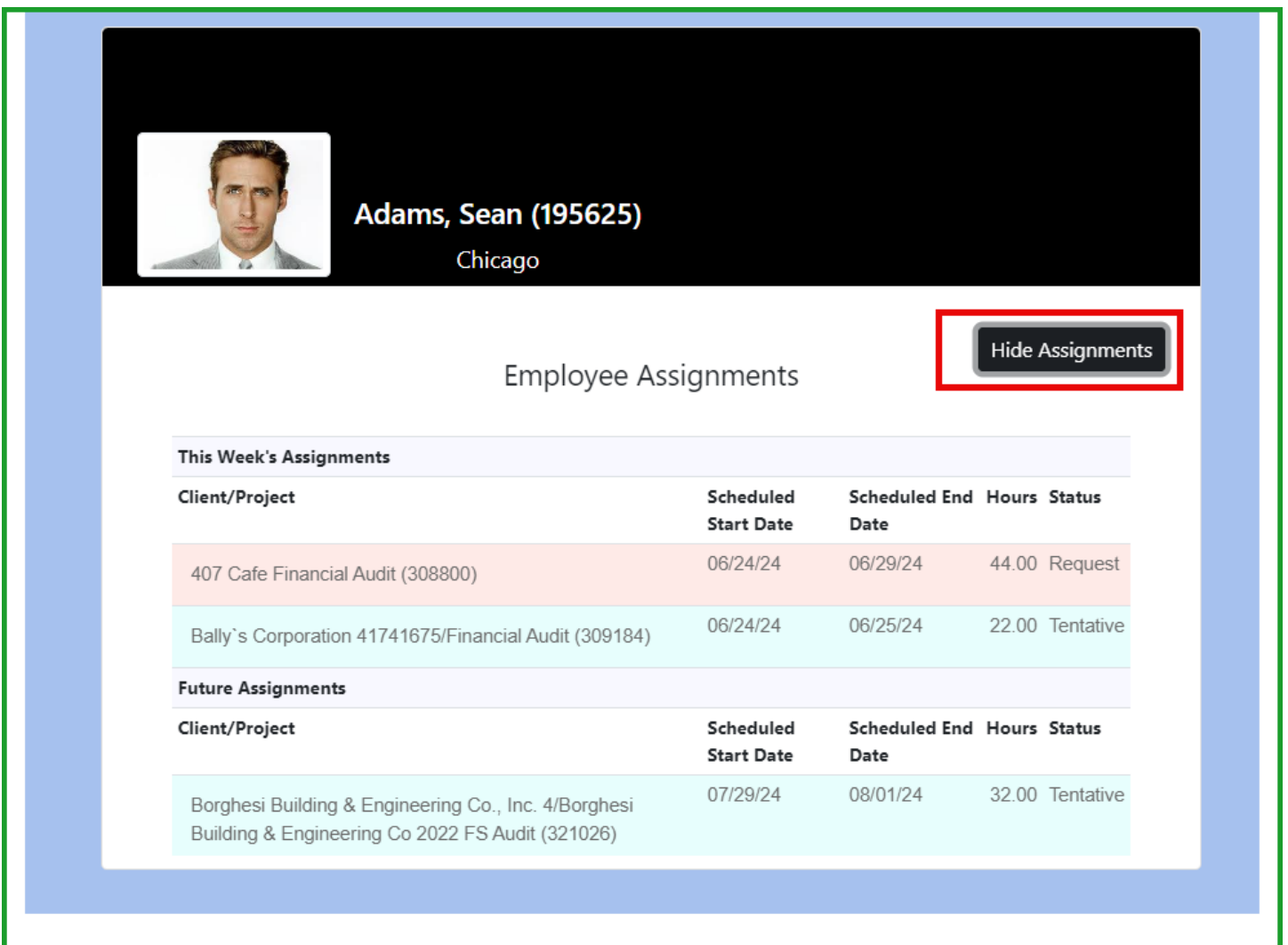Click the **Hide Assignments** link to return to the Employee Profile page:



Figure 32 – Employee Profile Page Assignments and Hide Assignments Link

## Improved Resource Copy

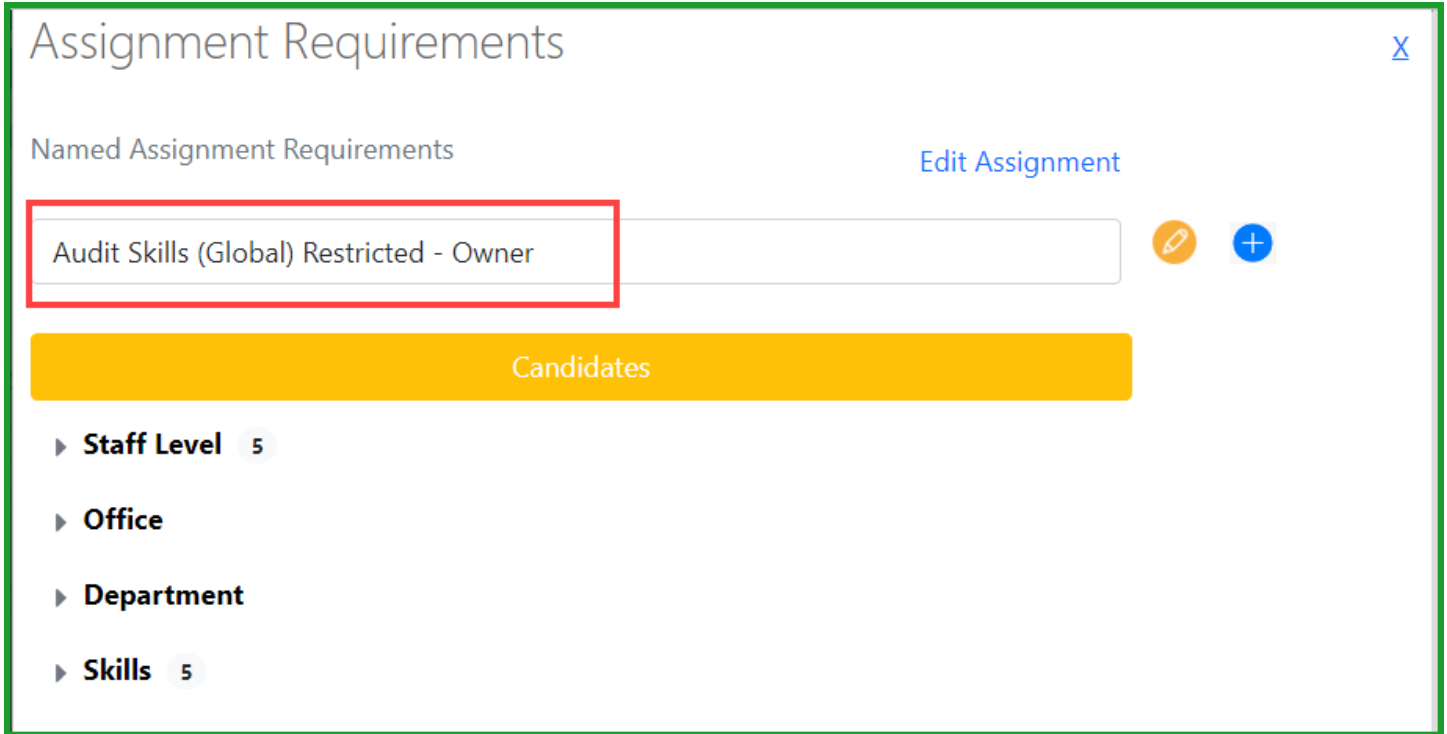The Resource Copy feature now includes Source Project Assignment Requirements when the requirements are defined.



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:
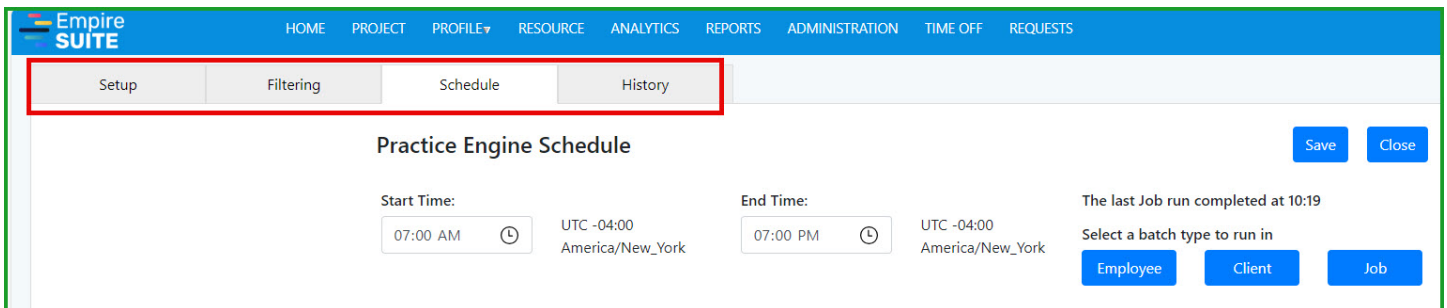


Figure 34 – Practice Engine Integration Page Tabs

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:

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.



Figure 36 – Current Week Schedule Email