

# New AkkenCloud Features – July 10<sup>th</sup>, 2017

## Faster Time Sheet Module Load Time

In the past, when accessing the timesheet module (**Accounting -> Timesheets**) all your historical timesheet data would populate, leading to a longer-than-necessary load time. Going forward, date ranges for all timesheet modules (approved, rejected, and deleted) will be reduced to 90 days from the most recent timesheet end date. When using AkkuSearch, be sure to first specify the date range if a range of other than 90 days is desired.

Following are the submitted timesheets that need to be review for approval.

Total hours submitted from 07/17/2008 to 06/18/2017 : 273.00  
Total Days\* / Miles\* / Units\* submitted from 07/17/2008 to 06/18/2017 : 0.00

NOTE: Process Timesheet Rules will be applied only for "Regular".

Emp ID	Employee Name	Assignment ID	Cust ID(s)	Customer Name	Work State	Start Date	End Date	Total	Timesheet Layer	Submitted Time
21	Tammy Irwin	PTO,ASGN100023	4	Marquette Fin	NH	06/12/2017	06/18/2017	40.00	Regular	06/23/2017 12:00
16	Joseph Smith	ASGN100023	4	Marquette Fin	NH	06/12/2017	06/18/2017	20.00	Regular	06/23/2017 12:00
3	Cindi Wright	ASGN100028	1,2	Boston Geriatr	MA,NH	06/12/2017	06/18/2017	40.00	Regular	06/23/2017 12:00
16	Joseph Smith	ASGN100023	4	Marquette Fin	NH	05/15/2017	05/18/2017	32.00	Regular	05/24/2017 09:00
3	Cindi Wright	ASGN100052	3,2	Jenn's Vet, Nev	NH	09/30/2008	10/04/2008	40.00	Regular	07/16/2009 11:00
21	Tammy Irwin	ASGN100031	4	Marquette Fin	NH	08/25/2008	08/29/2008	40.00	Regular	11/20/2008 11:00
3	Cindi Wright	ASGN100028	1,2	Boston Geriatr	MA,NH	09/12/2008	09/14/2008	21.00	Regular	09/19/2008 16:00
3	Cindi Wright	ASGN100004	2	New Horizon Ir	NH	07/17/2008	07/23/2008	40.00	Regular	07/23/2008 13:00

## Easy Access To All Documents

In the past, when a user was terminated their files within the Document Manager (**Collaboration -> Document Manager**) were rendered inaccessible. To ensure that our customer's never lose access to any of their documents, now super-users within the system can reassign these documents to users with similar permissions.

Document library helps in easy exchange and editing of documents of all types.

Title	Size	Posted by	Date Modified
AkkenPresentation	364.15 KB	Martin Nilsson	11/29/2011 10:11 AM
<b>TEST</b>	583.00 KB	Melissa Connor	7/7/2017 2:02 PM
Workflow	324.64 KB	Martin Nilsson	11/29/2011 10:10 AM
Akken Staffing Report List - PA...	18.00 KB	Martin Nilsson	11/2/2009 3:19 PM

This employee can be specified in the resulting window after clicking “Deactivate” for a given employee within User Management (**Admin -> User Management**).

Settings for Deactivated Employee Records [Deactivate Employee] [Cancel]

Change Settings for Deactivated Employee Records

Change Ownership of records to **select employee**

*Note: Changing Ownership of records will change ownership of Calendar Events, Task Lists and Document Manager*

Move all existing emails to another location?  Yes  No

Existing Emails

Move to email account of **select employee** \*

Into folder named **Melissa Connor**

Forward New emails to another location?  Yes  No

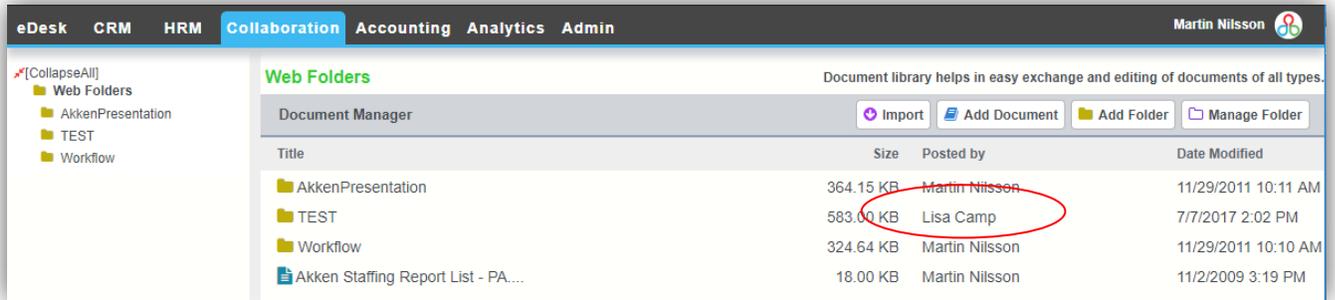
New Emails

Move to email account of **select employee** \*

Into folder named **Melissa Connor**

Settings for Deactivated Employee Records [Deactivate Employee] [Cancel]

Once you have specified who to transfer record ownership to, this change can be verified by going back into the Document Manager section.



## New & Expanded Report Templates

Additional reporting templates have been created and shared within the platform to further optimize your reporting abilities! These reports can be accessed by clicking on **Analytics**, and then clicking on either the **CRM** or **Accounting** subset. The first three reports in particular have been updated to include shift information after it's introduction last month. The details for each report are as follows:

- **CRM -> My Placements -> Placed Candidate**: Includes all information about candidates who have been placed on assignment within a specified date range. Shift Names are clearly noted in the last field.

Job Type	Shift Name
Temp/Contract	Second Shift
Temp/Contract	1st Shift
Temp/Contract	Second Shift
Temp/Contract	1st Shift
Temp/Contract	1st Shift

- **CRM -> Candidates -> Short Listed Candidates By Job**: This report includes information for candidates on a short list for a given job order. Once again, there will now be a field that clearly notes the shift that they have been short listed for.

ListedBy	Shift Name
Martin Nilsson	3rd Shift
Martin Nilsson	1st Shift
Martin Nilsson	Second Shift

- **CRM -> Job Orders -> Candidate Submission History Report With Roles:** Contains all pertinent information for candidates who have either been submitted or placed, along with their shift information and any internal roles clearly noted.

Submission Status	Status Date	Submission Date	Status Modified By	Status Notes	ShiftName
Submitted	06/27/2017	06/27/2017	Martin Nilsson		1st Shift
Placed	06/27/2017	06/27/2017	Martin Nilsson		1st Shift

- **Accounting -> Activities -> Temp Shift Schedule Report:** This report cites all hours currently assigned to a given employee or company, and compares them with the hours actually worked. This ensures that the client gets billed correctly.

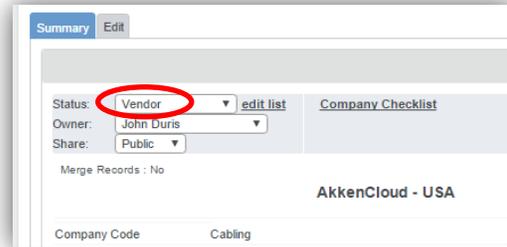
Shift Name	Shift Date	Shift Timing	Assignment Status	Scheduled Hours
1st Shift	07/10/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/11/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/12/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/13/2017	11:00 AM - 08:00 PM	active	9.00

- **Accounting -> ACA Requirements:** Unlike our existing ACA-related report, our new ACA report includes employee tax information and the actual hours worked for a given timeframe, as opposed to an average. This added info helps ensure that clients are capturing all the necessary info to work towards ACA compliance.

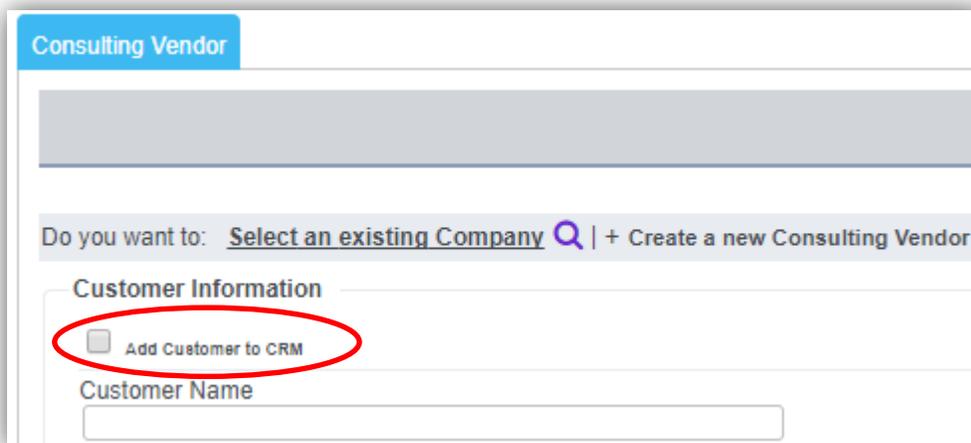
Assignment Id	Total Hours	Number of Weeks	Avg Hrs/wk	Current Status
ASGN100002	45.00	469.14	0.10	On Assignment
ASGN100004	355.00	78.00	4.55	On Assignment
ASGN100006	72.00	467.86	0.15	On Assignment
ASGN100008	94.01	468.14	0.20	On Assignment
ASGN100010	0.00		0.00	On Assignment
ASGN100012	0.00		0.00	On Assignment
ASGN100014	107.00	68.43	1.56	Not Active

## Simplified Vendor Transition

With this new addition, creating a vendor and associating candidates with recruiters is easier than ever! Vendors created within **HRM -> Vendors** now have a CRM Company record automatically created, which are clearly noted both in the **CRM -> Companies** module, as well as their individual company records with a status of “Vendor”.



Also, CRM companies that have their status changed to “Vendor” will have a Vendor record created under **HRM -> Vendors**. In the past, they were only located in the Vendors module and lacked some requested functionalities that CRM companies have.



A company with the status as vendor is assigned to the candidate as a recruiter, and to establish this you would navigate to **CRM -> Candidates** and then click on the **Contact Info** tab. Here you will establish the user as a company contact, and ultimately the recruiter for the vendor.

Mobile   
 Fax   
 Other  ext.   
 Contact Method  Phone  Mobile  Fax  Email

Recruiter Contact Information  
 [Create New Contact](#)

Roles:  
 Add Person:

Note : If no role is selected for an employee, such records will not be saved.

Candidates

Now to hire the candidate attached to the recruiter as a vendor, follow the standard hiring process in the system. Navigate to **CRM -> Job Orders**, locate and click on the desired job order and click **Submit a Candidate**.

Summary Edit

Add Document  Create Event  Create Task  Create Appointment  Broadcast  **Submit a Candidate**  Send Mail  Update  Copy  Close

Status:  [edit list](#) Job Order Checklist  
 Stage:  [edit list](#) Post Job Order to Web Site  
 Share:  [edit list](#) Mark as Hot Job  
 Owner:  [edit list](#) Post to Job Boards  
 Source Type:  [edit list](#) Candidate Source

Internal Description  
 Recruiter Lisa Camp

To Do Reminders  
  Add  
 Sort By:

Notes

In the resulting window, you will search for the candidate that you've already associated with the external recruiter, and complete the submission. After they have been submitted and the **Submissions** screen populates, forward the candidate to hiring/accounting.

**Submissions For PTA (Physical Therapist Assistant)** ( [view job order](#) )  
 Contact: [Ponting Ricky](#) | mycomp2

Click candidate name to view candidate summary screen. Click Date/Time to view submission email.

- Create a note about this Candidate (also shows in Job Order)
- Request an interview with the Contact
- Set up an interview with the Candidate
- Change interview status of Candidate (with notes)
- Place a Candidate (this button sends Candidate to HR Hiring Screens)  
Hire an Employee (this button sends Candidate to Accounting for approval)
- Re-Submit Candidate details to Contact
- View details after placement/hiring
- View Candidate availability details

Submitted Date  Candidate Nam  Candidate Phor  Last Update  Status  [edit](#)  Video Interv  Placement !  Submitted o Type

Submitted Date	Candidate Nam	Candidate Phor	Last Update	Status	edit	Video Interv	Placement !	Submitted o Type
2017-04-08 23:23:48	John Predy	445635921	04/08/2017	Submitted				My Candida

Showing records 1 to 1 of 1      Show 50 Records      Forward to Hiring      << Page 1 of 1 >>

Verify their placement information, and once all of their information is correct, then click **Place Candidate**. If the vendor was established by changing a current CRM Company's status to "Vendor", the Vendor record will be created only once the candidate is hired.

In the event that this employee is terminated and you want to associate the vendor recruiter with another candidate, navigate to **HRM -> Employee Management**, choose the now terminated employee and in the top tabs access **HR Data -> Tax Deductions**. Here under Vendor Name, the vendor on file can be switched.

The screenshot shows the profile for Timothy Dalton. The 'HR Data' tab is active, and the 'Tax Deductions' sub-tab is selected. Under the 'Employee Management' section, the 'Tax' type is set to 'C-to-C'. The 'Vendor Name' field is highlighted with a red circle and contains the text 'Ventura consulting'. Other fields include 'Contractor's Federal EIN #' and 'Address', both of which are currently empty.

Also, if multiple recruiter contacts exist for a given vendor, be sure to associate the candidate with the first contact in the list. This is accomplished by going to **Accounting -> Vendor**, and opening any Consulting Vendor from the grid. In the resulting window, scroll down to **Customer Contacts** to verify this information. In this example below, Tim Quirk should be the first recruiter to have a candidate assigned to them.

Customer Brief  
(internal notes)

Customer Summary  
(for job orders)

Search Tags  
(search keywords)

Billing Information +

Customer Culture/Onboarding Information +

Customer Contacts

[Add Contact](#) [Select CRM Contact](#)

Contact Name	Title	Contact Type	Phone Number		
Tim Quirk				<a href="#">Edit</a>	<a href="#">Delete</a>
Shirley Jones				<a href="#">Edit</a>	<a href="#">Delete</a>

Customer Candidates\*

[Add Candidate](#)

No Candidates are available.

[Update](#) [Close](#)