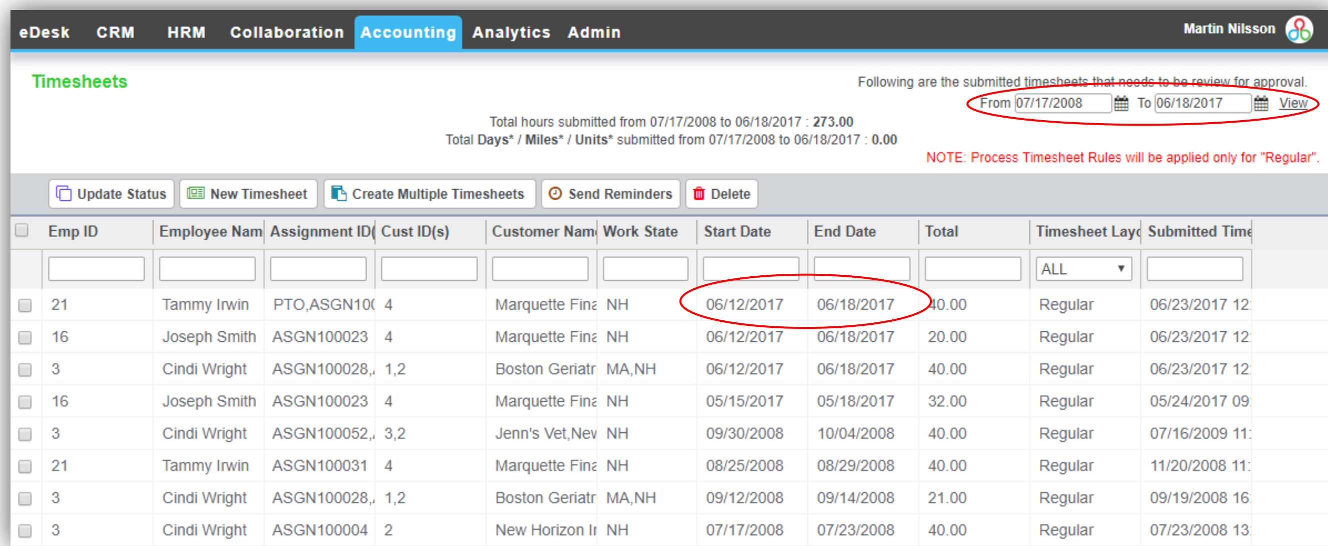
New AkkenCloud Features – July 10th, 2017

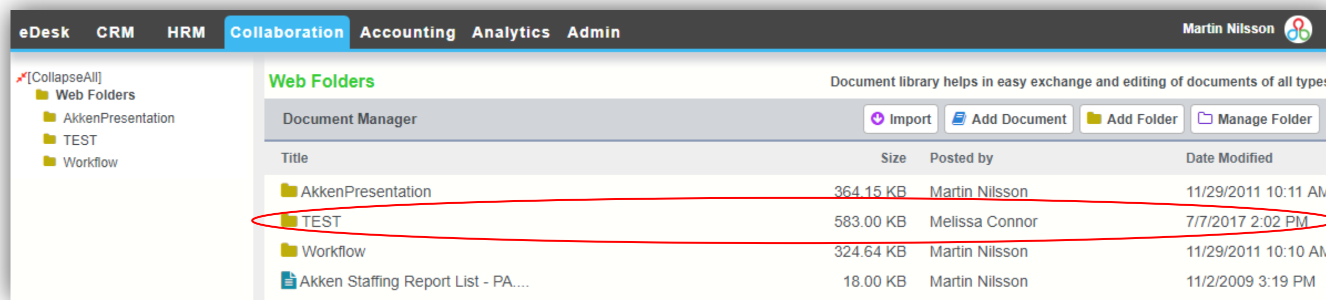
Faster Time Sheet Module Load Time

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.

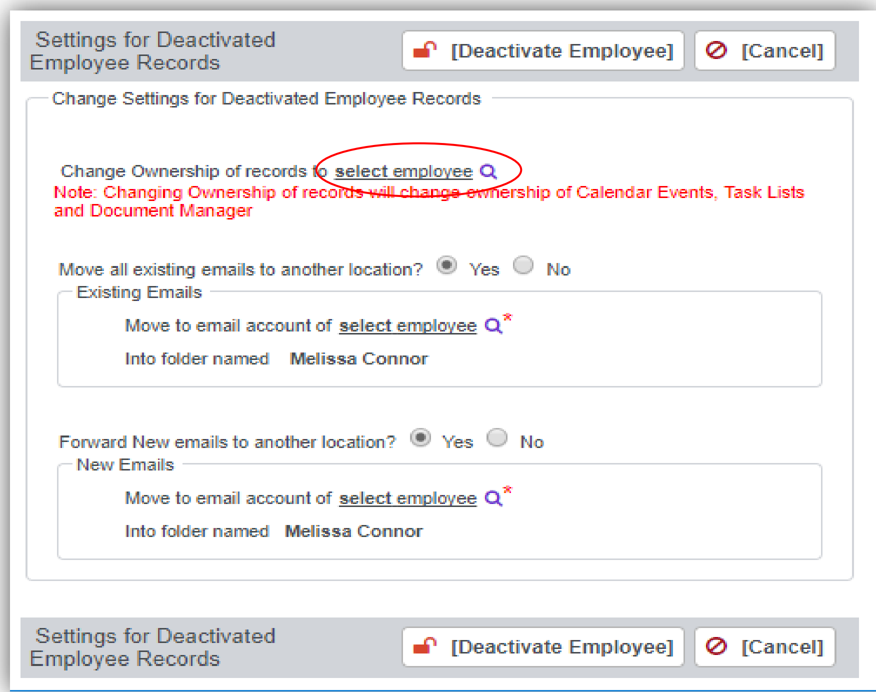


Easy Access To All Documents

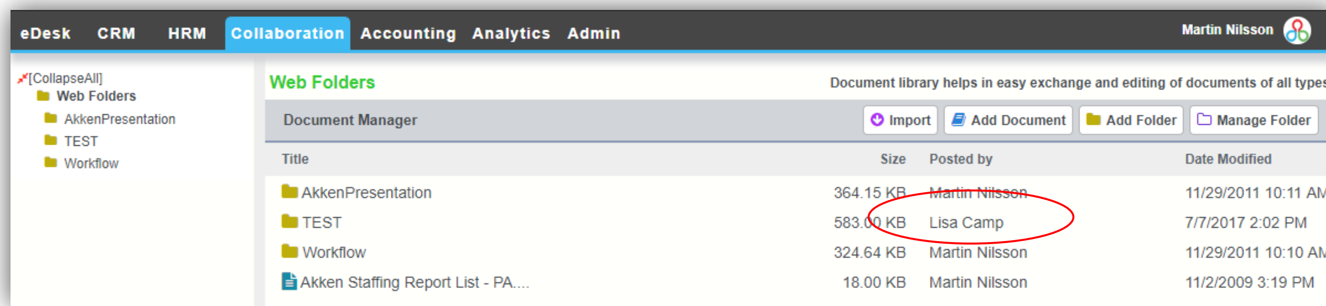
In the past, when a user was terminated their files within the Document Manager (**Collaboration -> Document Manager**) were rendered inaccessible. To ensure that our customer's never lose access to any of their documents, now super-users within the system can reassign these documents to users with similar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



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



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 -> <u>Placed Candidate</u>:** 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 -> <u>Short Listed Candidates By Job</u>:** 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 -> <u>Candidate Submission History Report With Roles</u>:** 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 -> <u>Temp Shift Schedule Report</u>:** 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.

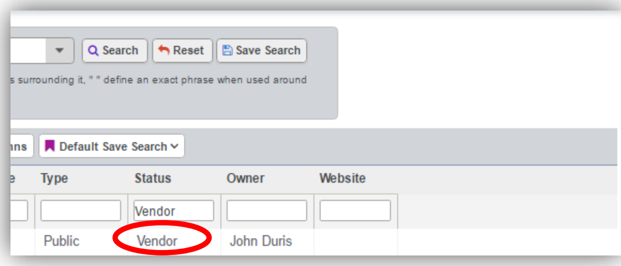
Shift Name	Shift Date	Shift Timing	Assignment Status	Scheduled Hours
1st Shift	07/10/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/11/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/12/2017	11:00 AM - 08:00 PM	active	9.00
1st Shift	07/13/2017	11:00 AM - 08:00 PM	active	9.00

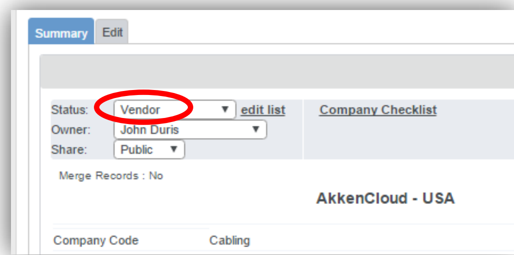
- **Accounting -> <u>ACA Requirements</u>:** Unlike our existing ACA-related report, our new ACA report includes employee tax information and the actual hours worked for a given timeframe, as opposed to an average. This added info helps ensure that clients are capturing all the necessary info to work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

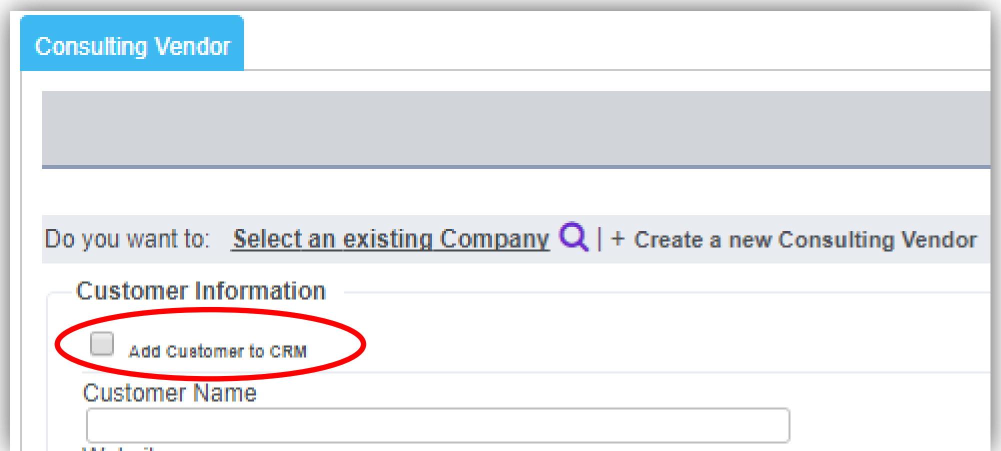
Simplified Vendor Transition

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".

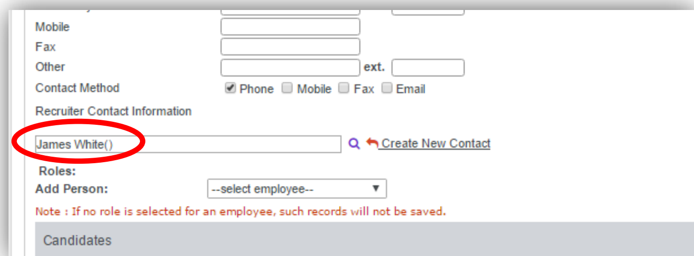




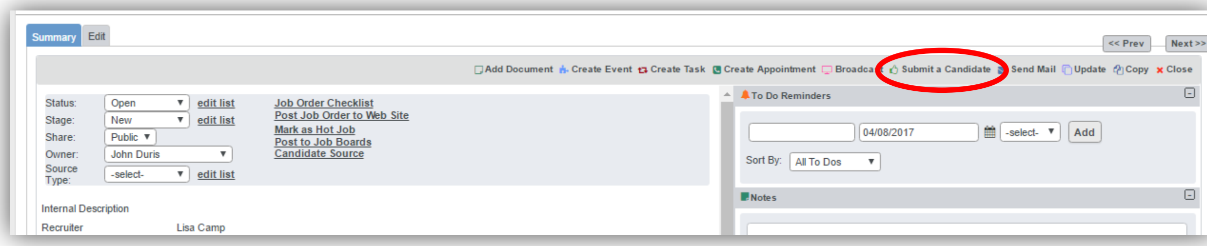
Also, CRM companies that have their status changed to "Vendor" will have a Vendor record created under **HRM -> Vendors**. In the past, they were only located in the Vendors module and lacked some requested functionalities that CRM companies have.



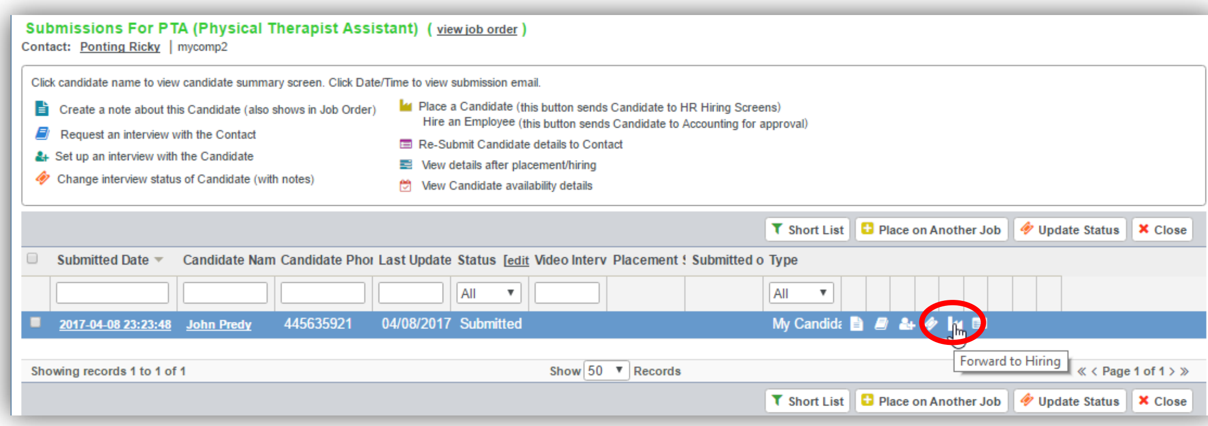
A company with the status as vendor is assigned to the candidate as a recruiter, and to establish this you would navigate to **CRM -> Candidates** and then click on the **Contact Info** tab. Here you will establish the user as a company contact, and ultimately the recruiter for the vendor.



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**.

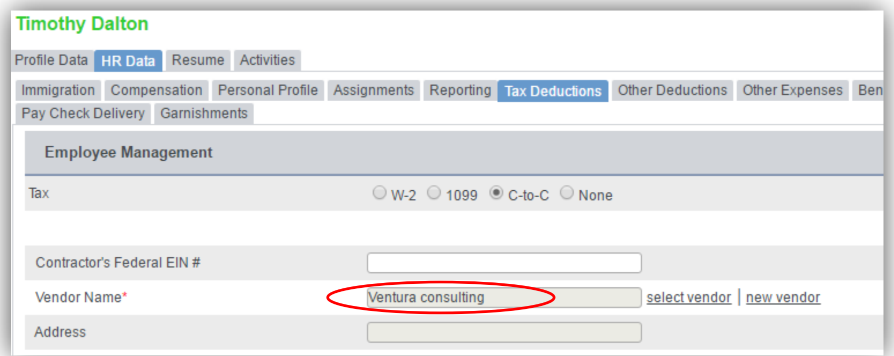


In the resulting window, you will search for the candidate that you've already associated with the external recruiter, and complete the submission. After they have been submitted and the **Submissions** screen populates, forward the candidate to hiring/accounting.

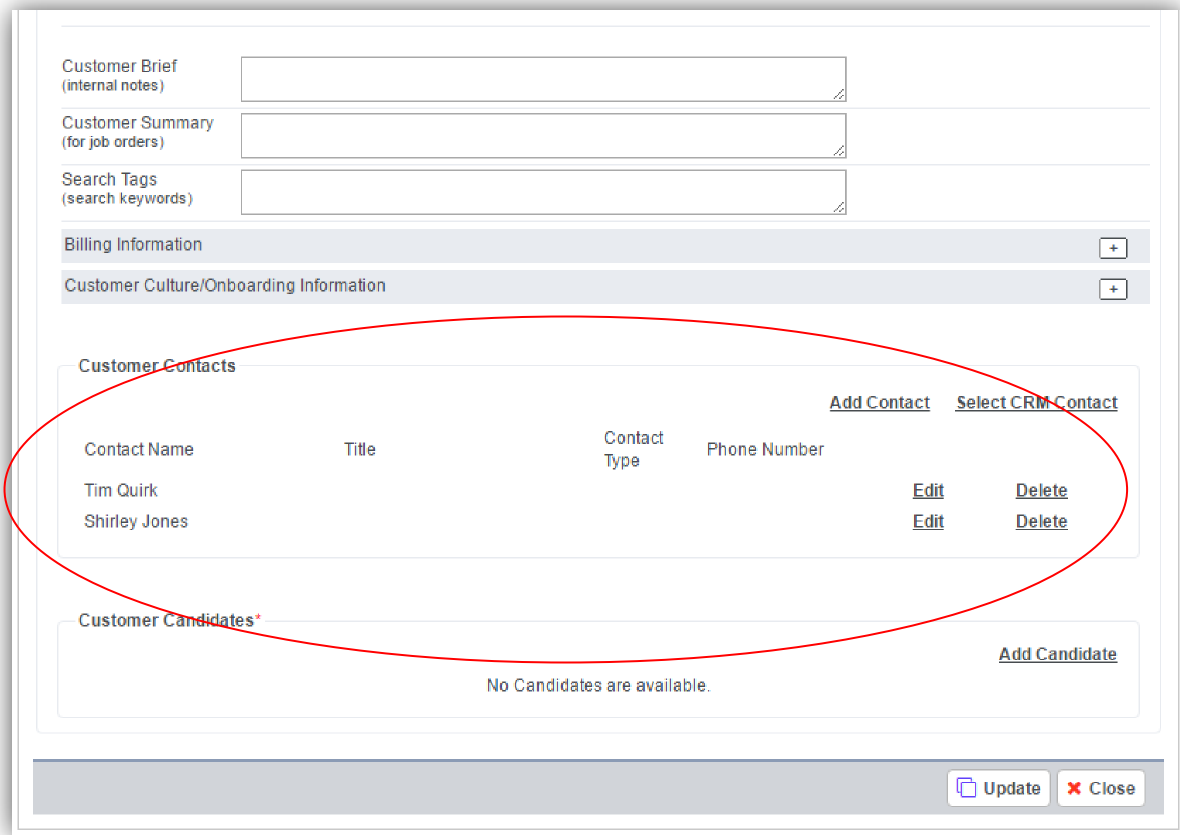


Verify their placement information, and once all of their information is correct, then click **Place Candidate**. If the vendor was established by changing a current CRM Company's status to "Vendor", the Vendor record will be created only once the candidate is hired.

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.



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
Edit
Delete
Shirley Jones
Edit
Delete
Customer Candidates*
Add Candidate
No Candidates are available.
Update
Close