



# Product Roadmap

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2024 Asure Reseller Partner Conference

Presented by Yasmine Rodriguez





**Yasmine Rodriguez**

Chief Technology Officer, Asure

# Technology Roadmap

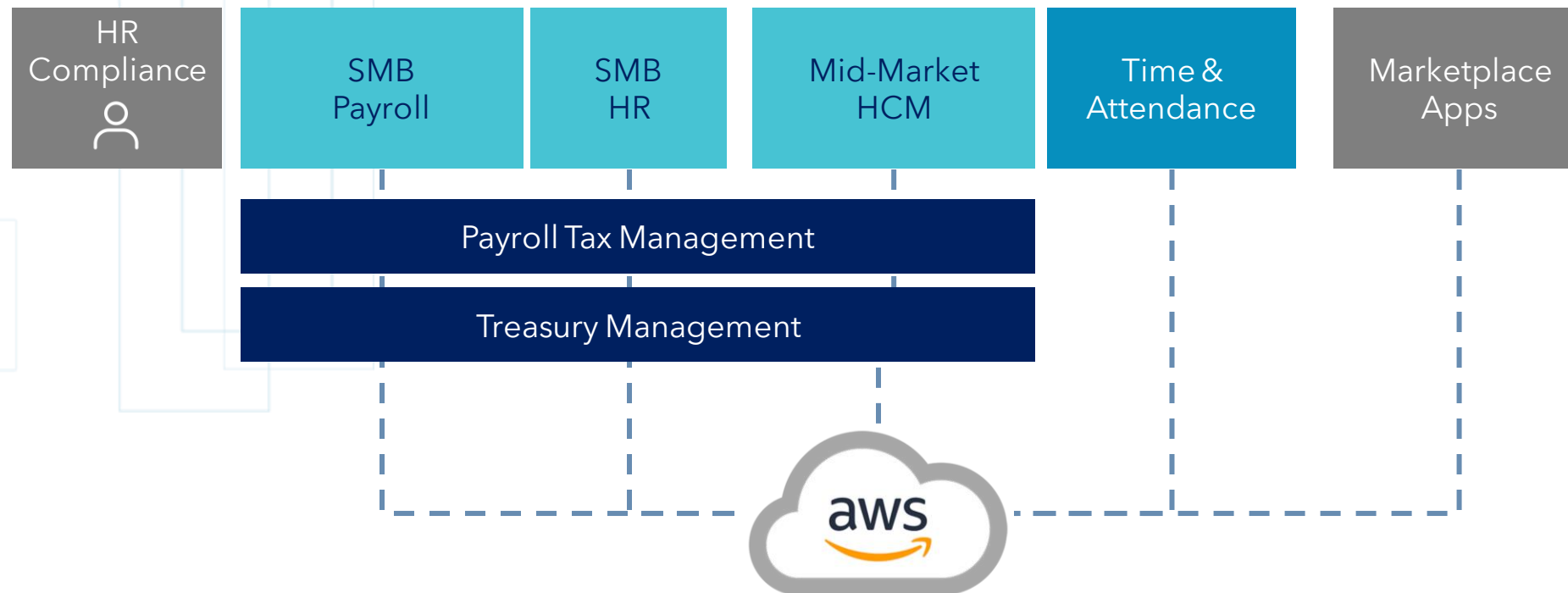


# Rewind to Evolve 2023

## What we said we'd do

# Modernization Starting Point | 2022

The goal of modernization is to unify the front-end user experience of all legacy applications while reconstructing the back-end architecture for better performance, scalability, and lower cost to serve.







## Technology Underpinning Growth & Compliance

- Next-gen infrastructure that supports new solutions, greater agility, and AI
- Employee Centric solution
- Intuitive, seamless and simple
- UI/UX backend-agnostic architecture
- Leverage API contracts to abstract backend complexities
- Responsive and compatible across desktop, tablet and mobile



# 2024 Roadmap

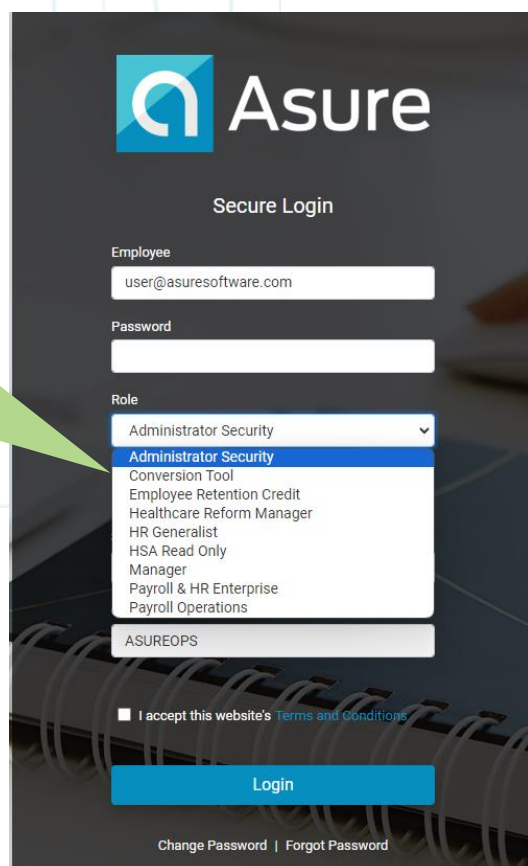
What we did & what's next

# Modernization Starting Point | 2022

The goal of modernization is to unify the front-end user experience of all legacy applications while reconstructing the back-end architecture for better performance, scalability, and lower cost to serve.

Login UX different for all Apps

Users must log out and back in to change roles



**Asure**

Secure Login

Employee  
user@asuresoftware.com

Password  
[Redacted]

Role  
 Administrator Security  
 Administrator Security  
 Conversion Tool  
 Employee Retention Credit  
 Healthcare Reform Manager  
 HR Generalist  
 HSA Read Only  
 Manager  
 Payroll & HR Enterprise  
 Payroll Operations  
 ASUREOPS

☐ I accept this website's [Terms and Conditions](#)

Login

[Change Password](#) | [Forgot Password](#)



Evolution Login (v 24.01.03.074) (64-bit)

**Evolution<sup>®</sup>**  
HCM Technology

Login Id  
[Redacted]

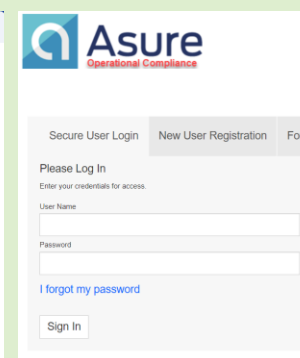
Password  
[Redacted]

Server  
compliance.evolutionsai

Compression  
T1

☐ Change Password ☐ Forgot Password

OK Cancel Settings...



**Asure**  
Operational Compliance

Secure User Login New User Registration Forgot

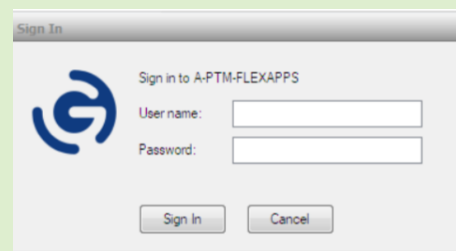
Please Log In  
Enter your credentials for access

User Name  
[Redacted]

Password  
[Redacted]

[I forgot my password](#)

Sign In



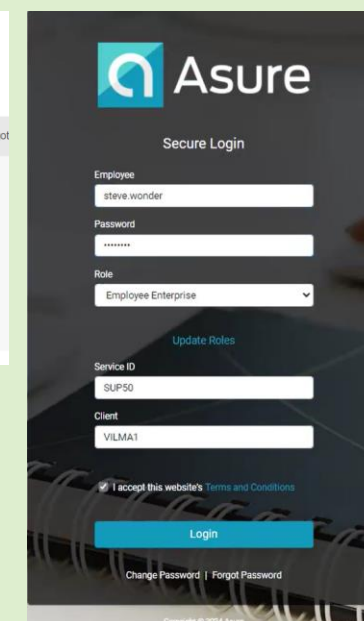
Sign In

Sign in to A-PTM-FLEXAPPS

User name:  
[Redacted]

Password:  
[Redacted]

Sign In Cancel



**Asure**

Secure Login

Employee  
steve.wonder

Password  
[Redacted]

Role  
Employee Enterprise

[Update Roles](#)

Service ID  
SUP50

Client  
VILMA1

☒ I accept this website's [Terms and Conditions](#)

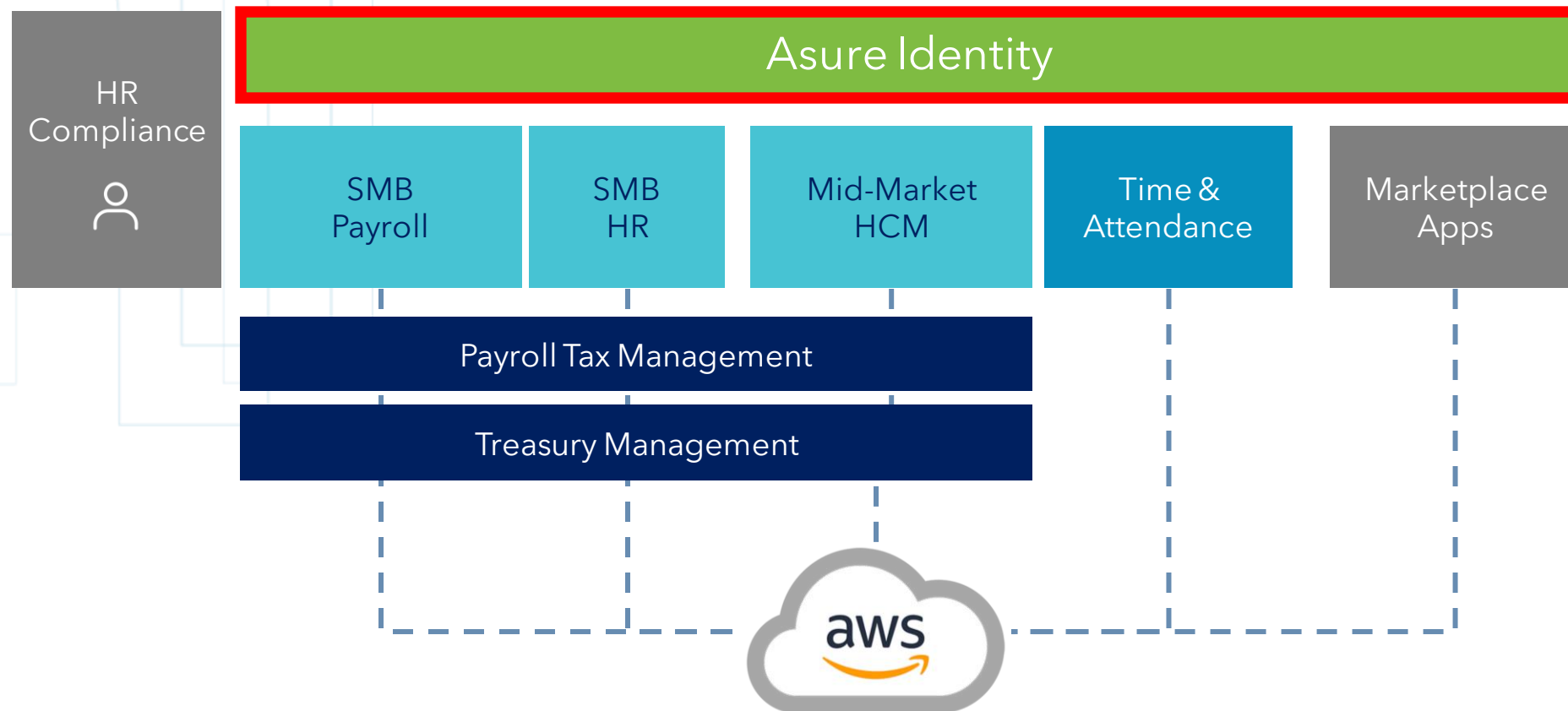
Login

[Change Password](#) | [Forgot Password](#)

Copyright © 2014 Asure

# Stage #1 | Asure Identity

The first step in unifying all apps is to create a common login for all users. More than Single-Sign-On, Asure Identity ties together different concepts of users and their security roles across disparate legacy systems.





# Why Azure Identity?



Clients use **several apps** to  
**run their business**



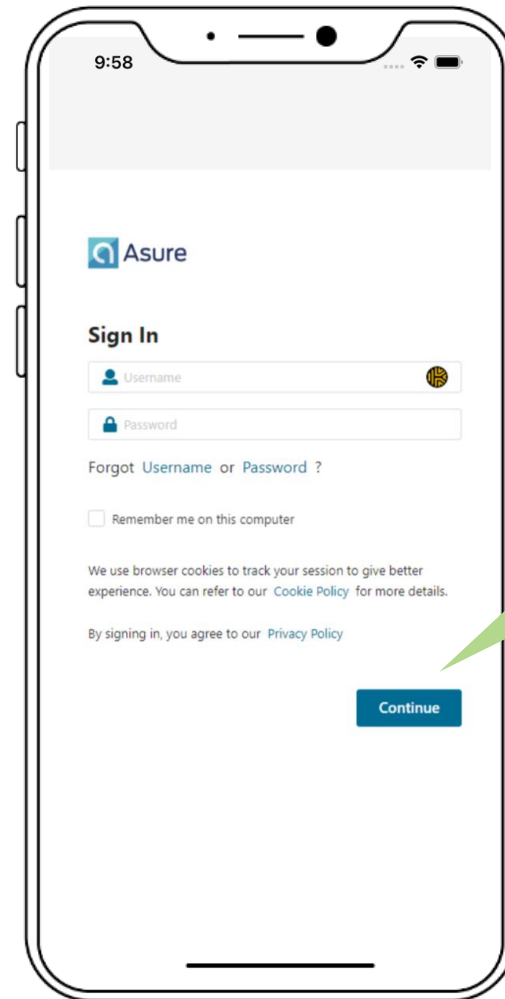
But **time is money** so they need  
everything to **work seamlessly**



They **can't wait** for support to  
**provision users** and **reset passwords**

# Stage #1 | Asure ID is LIVE!!!

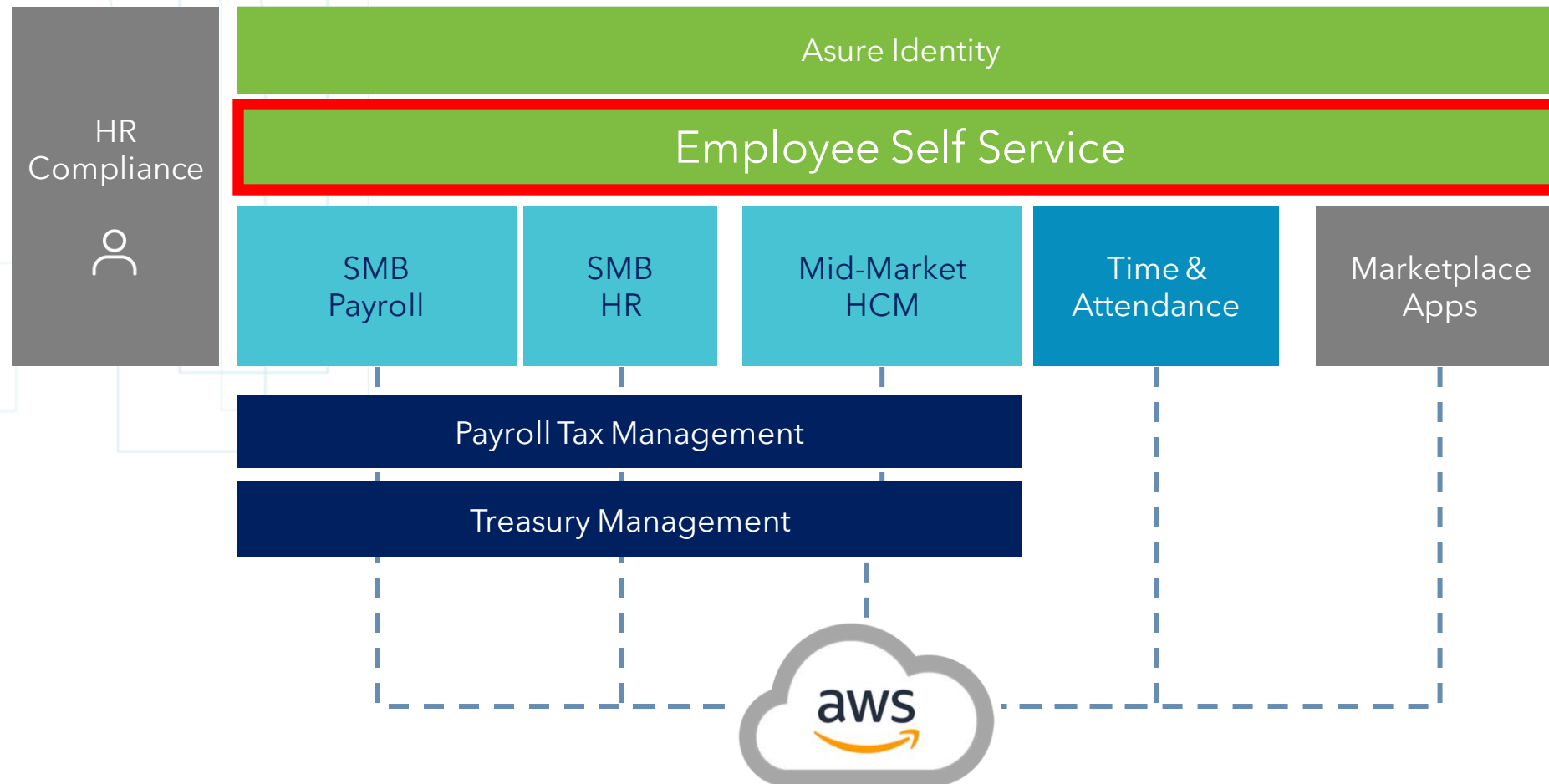
- Multifactor Authentication
- User Provisioning and management
- Self-service registration and recovery
- Single-Sign-On
  - Products
    - Today - SMB Payroll & Swipeclock
    - Future - All Asure products
  - Roles
    - Employees
    - Managers
    - Owners & Admins



Automatically IDs  
which apps and role(s)  
user has access to

# Stage #2 | Employee Self Service

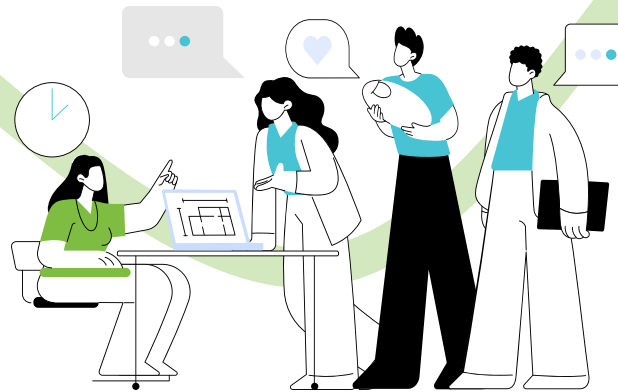
Now that users can access all legacy apps, we start exposing features via new UX that impact the highest # of users and reduce administrative workload for SMBs by allowing employees to perform their own transactions



# Why ESS? The Distraction of Employee Administration



Clients have **great products** and a **vision** to **grow their business**



But their **employees have questions** and **life events** that **require their time**



Leaving them **buried in admin work...**  
**not focused** on growing their business!



## Why ESS? The Cost of Manual HR Data Entry



According to Ernst & Young, each manual data entry by an HR professional costs an average of **\$4.78**

## Why ESS? The Cost of Manual HR Data Entry



**Now employees don't even need to  
come to me to make their changes.  
They can just submit them!**

Juanita @ Dunkling and Pennery Dentistry  
on personal info, W4, and Direct Deposit

# There's a Better Way

## Asure's Employee Self-Service

### EMPLOYERS

- Eliminate paper and electronic forms
- Reduce manual entry and correspondence to change employee data
- Eliminate requests for:
  - ✓ Check stubs
  - ✓ W2 copies
  - ✓ W4 deductions
  - ✓ Benefits info
  - ✓ Company policies
  - ✓ And more



### EMPLOYEES

- Manage their own info:
  - Name change
  - Address change
  - W4 deductions
  - New dependent
  - Marital status
  - Etc.
- Access their own data:
  - ✓ Check stubs
  - ✓ W2 copies
  - ✓ Benefits info
  - ✓ Company policies
  - ✓ And more

# Key Features / Most advanced Employee Self-Service in the Industry



## **AsureID**

Central Admin for single sign-on with multi-factor authentication



## **Security**

Tokenization protects your data in transit and on the app



## **Mobile First**

The same user experience on PC or any mobile device



## **Multi-Lingual**

English and Spanish for a culturally diverse modern workforce



## **Benefits**

Direct access to health plan info and marketplace offers

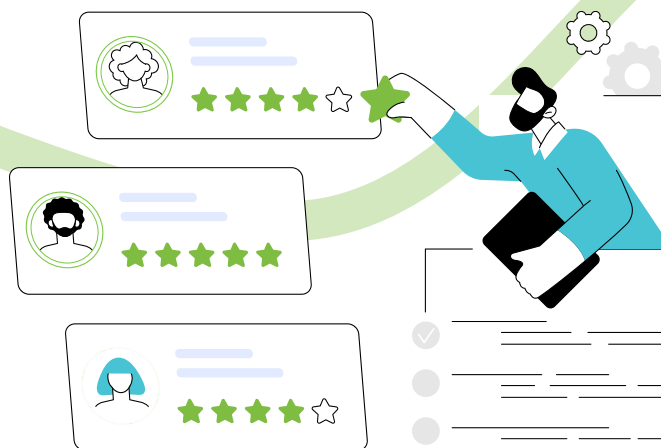


# The Result for Clients?

## More than Employee Self-Service



**Reduce stress and  
get their time back**



**Happier, more productive** employees

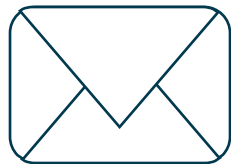


**Focus on growing their  
business**

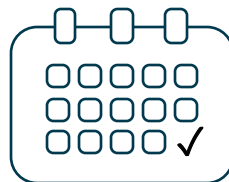


# How do clients activate Asure's Employee Self-Service?

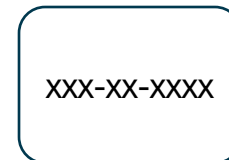
For each employee, simply update three fields in the employee record:



Email

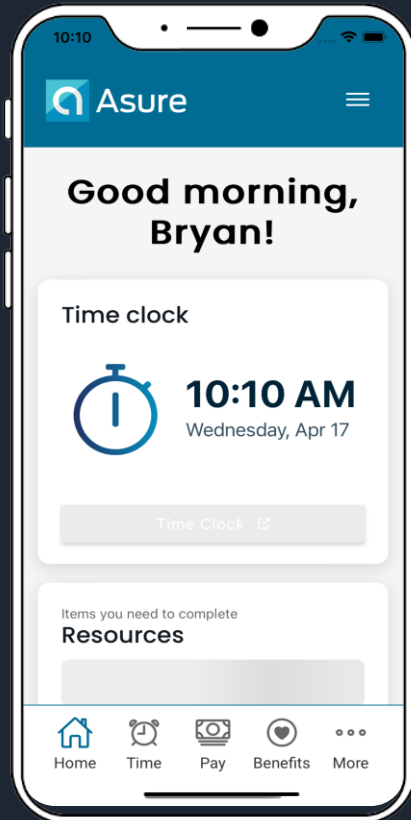


Date of Birth



Social Security #

# Stage #2 | Staged Deliverables



## LIVE NOW

- Resources
- Announcements
- Demographic EE Edit and Approvals
- Direct Deposit Request & Approvals
- Time Off Balances
- Paystubs
- Year End Forms W2s/1099s
- Marketplace Widget
- Benefits Info
- Swipeclock Punches
- Time Off Requests
- Manager: Time Off Planner
- Manager: Action Items
- Manager: Employee Listing
- Multiple Client Support
- Admin Portal Registration Mgmt
- Bureau Readiness Reporting
- Mobile App

## MAY & JUNE

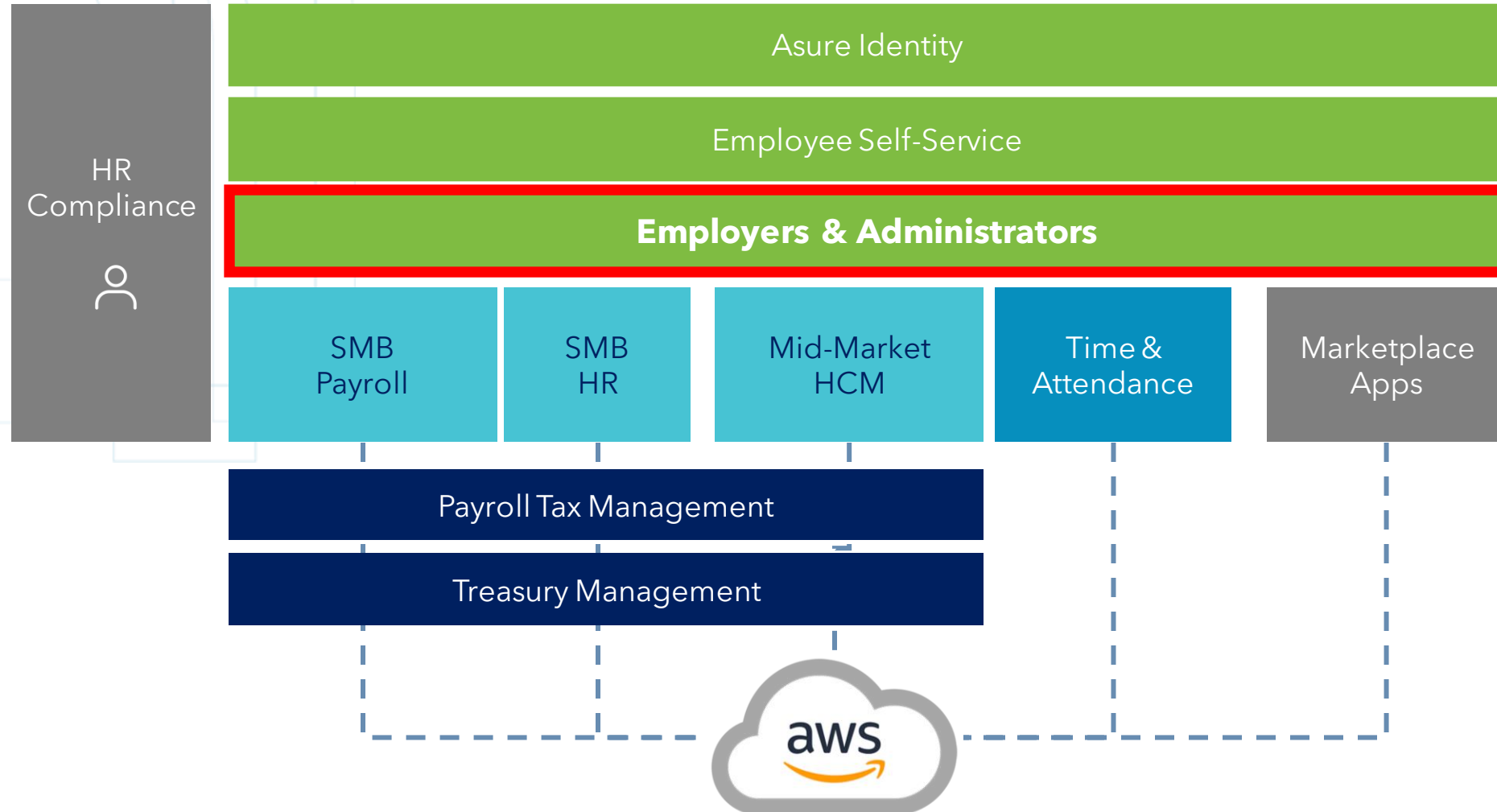
- Bureau Adoption Reporting
- Mid-Market Asure ID & ESS dev starts

## REST OF 2024

- Asure Time and Attendance
- Advanced HR
- Onboarding
- Performance Management
- Certifications
- E-Signature
- Applicant Tracking

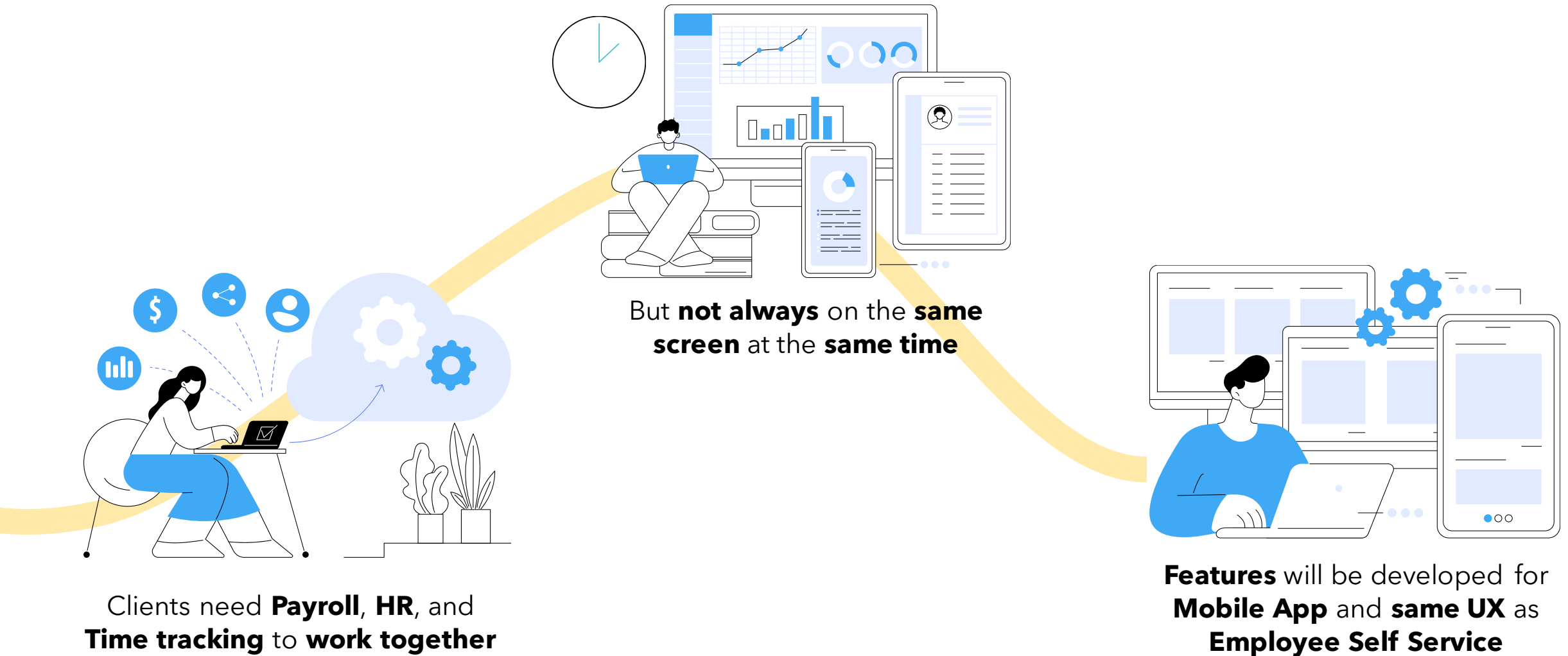
# Stage #3 | Employers & Admins

Next we begin exposing features to administrative functions like hiring employees, processing payroll, and managing benefits. Administrative capabilities will be delivered in tranches over time.





# Employer & Admin Capabilities/ One HCM platform, many Screens



# Employer & Admin Capabilities/ Unifying Workflows

**Admin Features**  
released in tranches  
**prioritized** based on  
**most common**  
**workflows**

9:41

Add New Hire

➔ ② ③ ④

Profile Company Tax Pay

Personal Info

Prefix  
Ms, Mr, Miss

First Name \*  
First Name

Middle Name  
Middle Name

Last Name \*  
Last Name

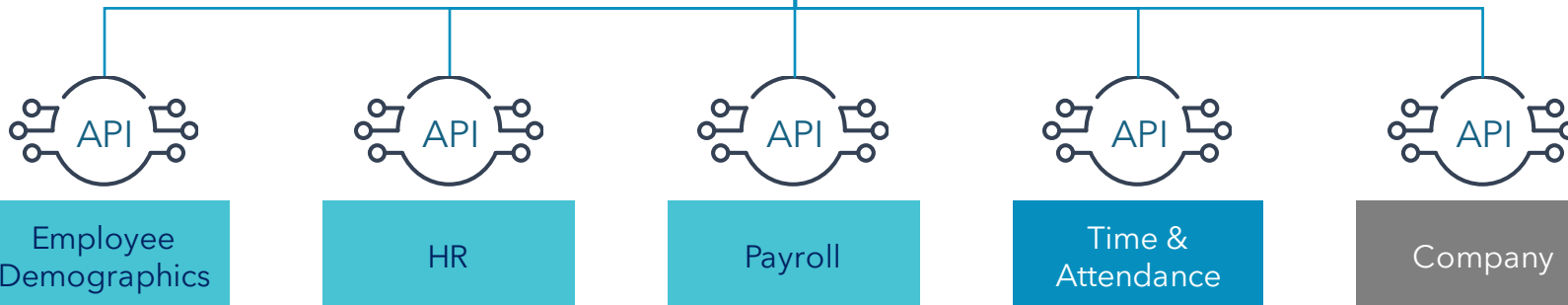
Suffix

Cancel Next

Home Employee Payroll Time & Attendance Jobs

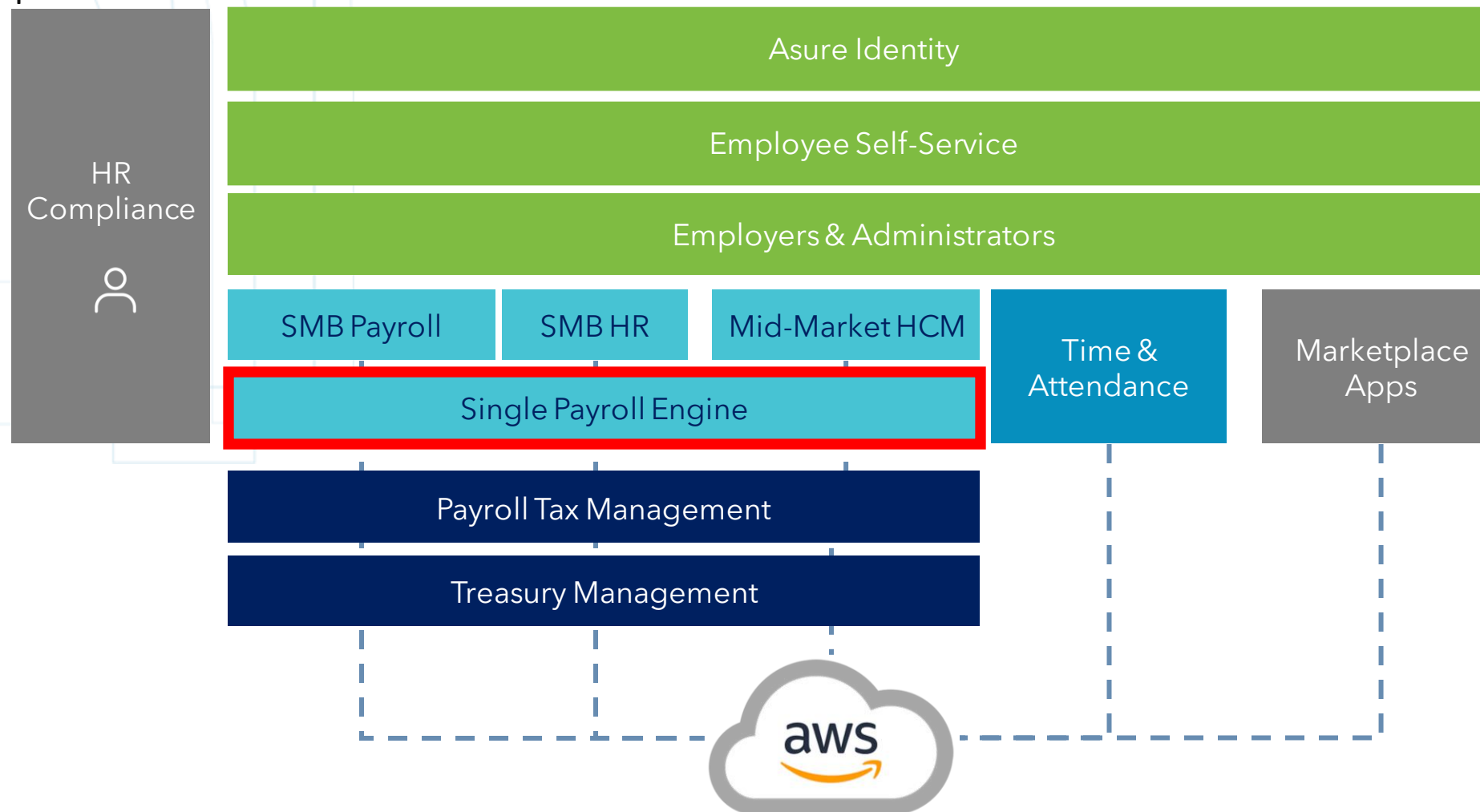
## Common Workflow Groups

- Applicant tracking
- Onboarding
- Document routing and eSign
- Pay rates, earnings, deductions
- Banking & treasury
- Payroll entry
- Payroll processing
- Benefit enrollment
- Performance management



# Stage #4 | New Payroll Engine

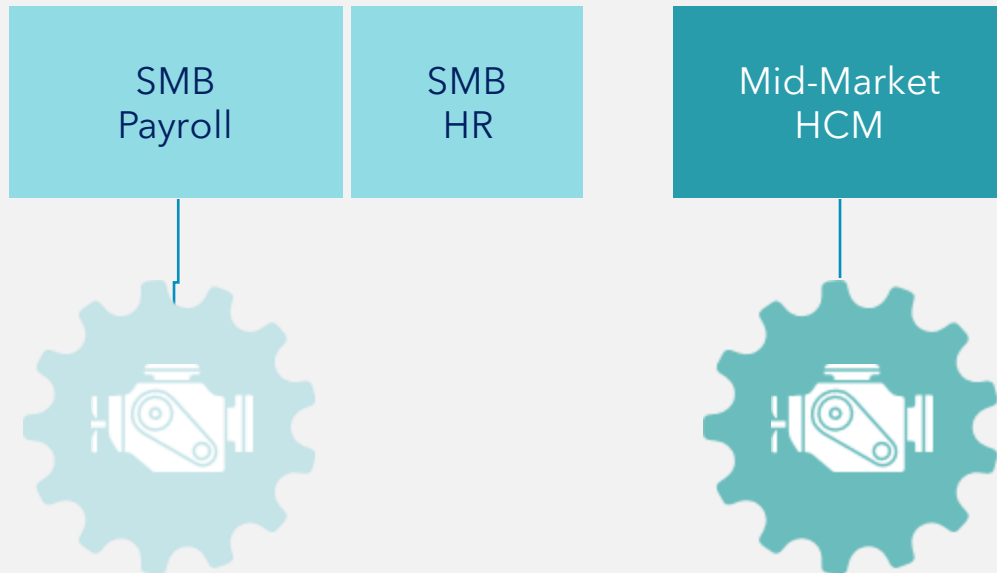
As the front-end team progresses with the rollout of administrative functionalities, the back-end engineers are simultaneously deconstructing the existing system to incorporate a versatile payroll calc engine that will operate across all platforms



# New Payroll Engine/ Unplugging the old, upgrading the new

## TODAY

Separate payroll engines hard-coded into each product and calculate transactions uniquely



- Linear, batch-based calculations (aka Slow)
- 2x maintenance, development, and expertise
- Old architecture; Updates create unintended regressions

## FUTURE

One payroll engine serving all front-ends with enhanced performance and scalability

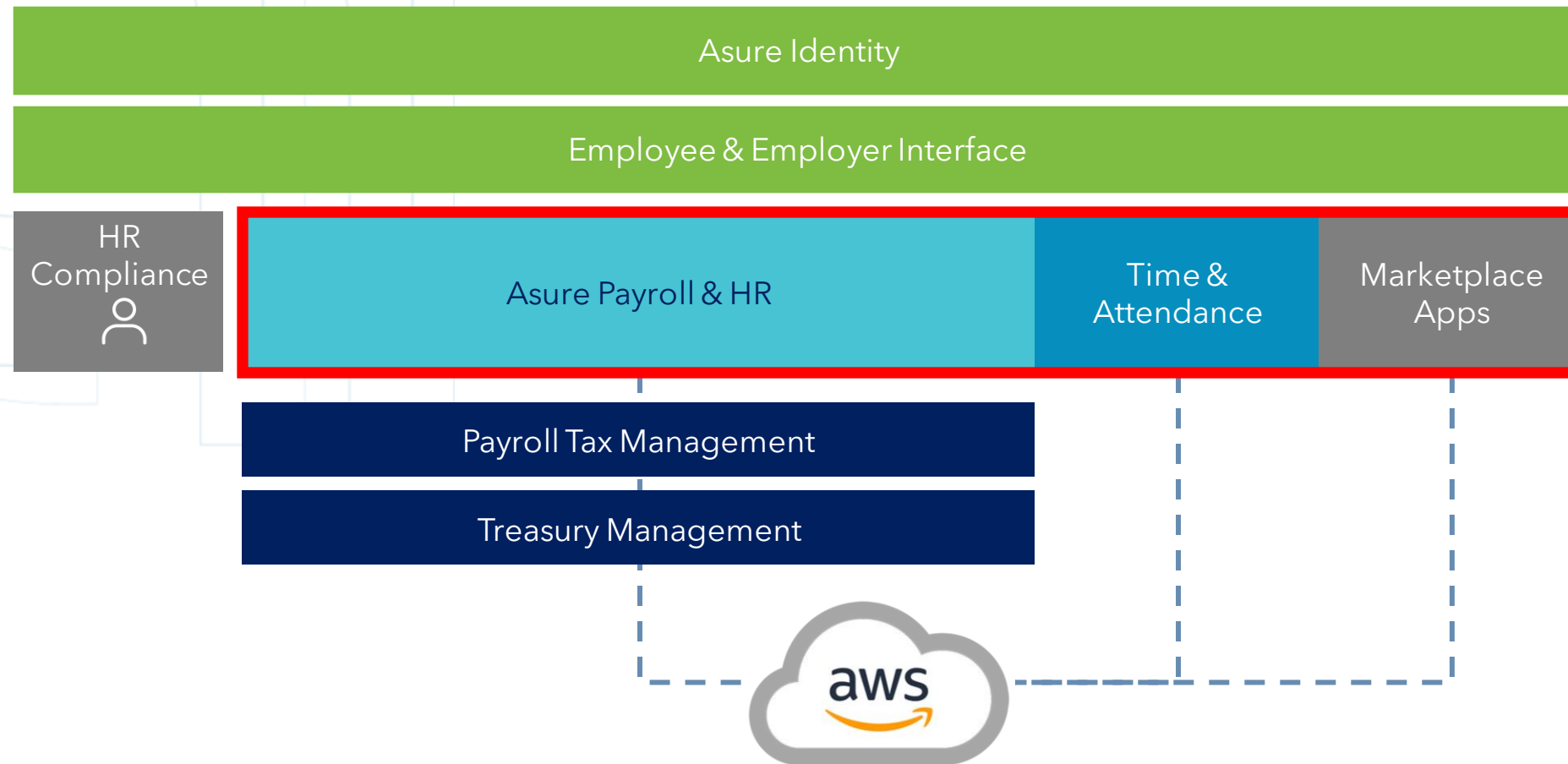


- NEW step-function processing (2 EE payroll in 20 sec)
- 1x maintenance, development, and expertise
- Faster, safer updates to entire tech stack

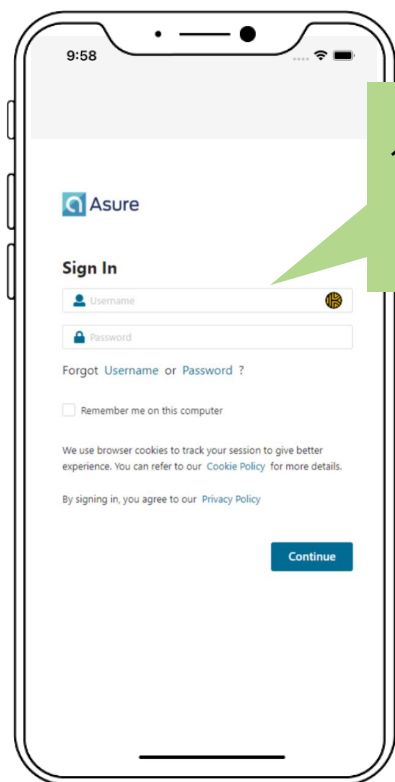


# Stage #5 | Single Platform

All legacy products, portals, and services are delivered through a common UX while back-end infrastructure is decomposed into a service-oriented architecture that is more powerful, scalable and lowers cost to serve.

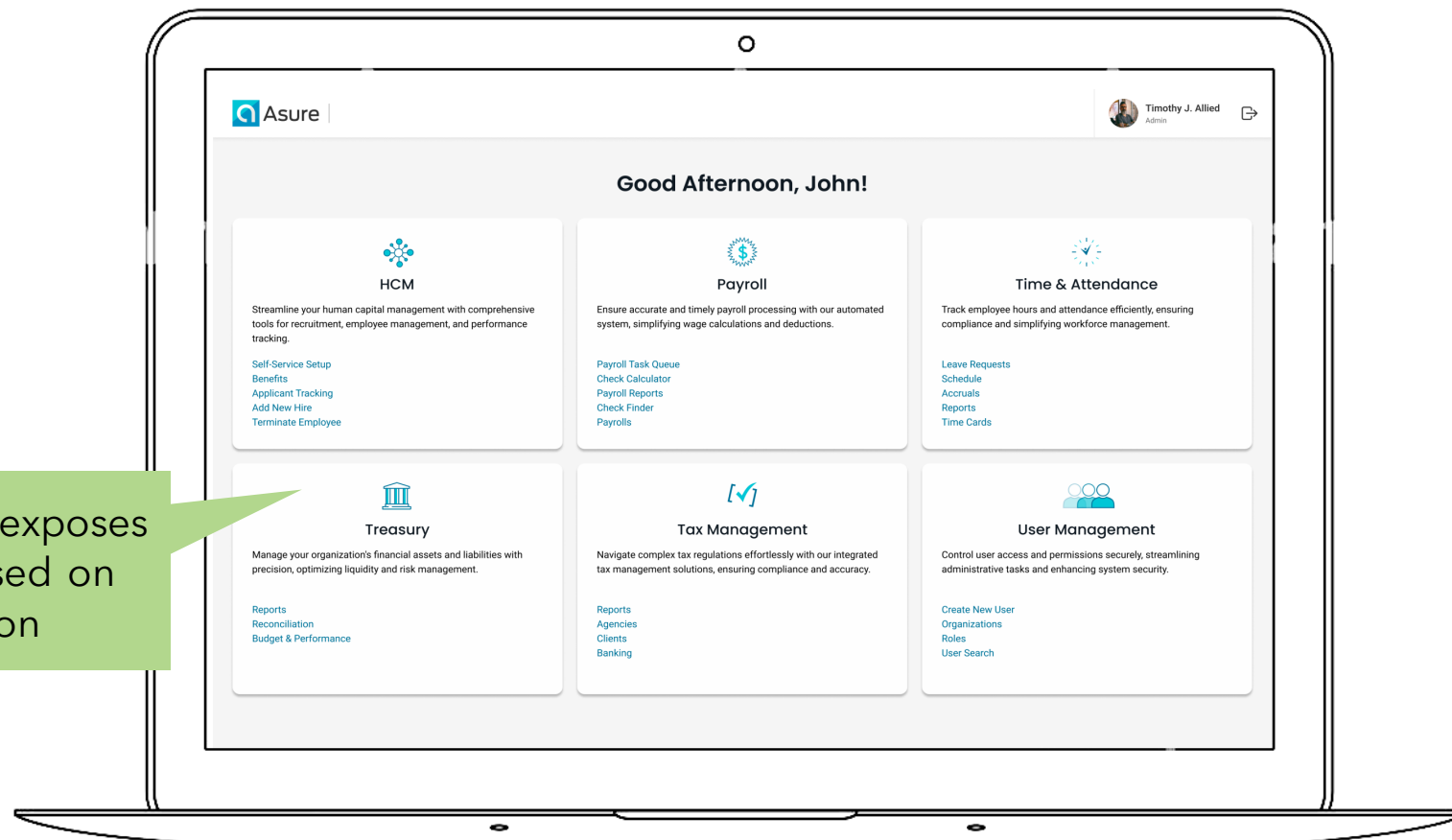


# Single Platform/ Simple front-end, **Sophisticated Back-End Architecture**

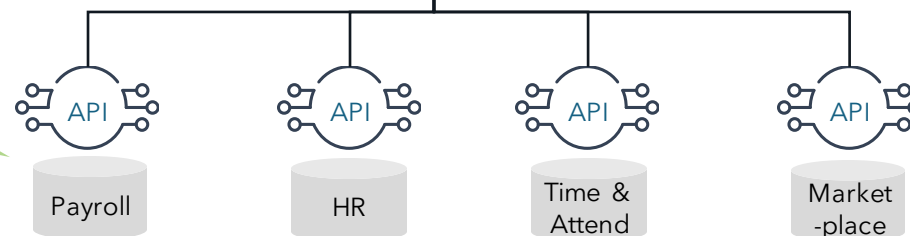


1. From a single login page

2. AsureID exposes apps based on permission



3. With scalable, interchangeable architecture



# What's next?



Timothy J. Allied  
Admin



Good Afternoon, John!



## HCM

Streamline your human capital management with comprehensive tools for recruitment, employee management, and performance tracking.

[Self-Service Setup](#)  
[Benefits](#)  
[Applicant Tracking](#)  
[Add New Hire](#)  
[Terminate Employee](#)



## Payroll

Ensure accurate and timely payroll processing with our automated system, simplifying wage calculations and deductions.

[Payroll Task Queue](#)  
[Check Calculator](#)  
[Payroll Reports](#)  
[Check Finder](#)  
[Payrolls](#)



## Time & Attendance

Track employee hours and attendance efficiently, ensuring compliance and simplifying workforce management.

[Leave Requests](#)  
[Schedule](#)  
[Accruals](#)  
[Reports](#)  
[Time Cards](#)



## Treasury

Manage your organization's financial assets and liabilities with precision, optimizing liquidity and risk management.

[Reports](#)  
[Reconciliation](#)  
[Budget & Performance](#)



## Tax Management

Navigate complex tax regulations effortlessly with our integrated tax management solutions, ensuring compliance and accuracy.

[Reports](#)  
[Agencies](#)  
[Clients](#)  
[Banking](#)

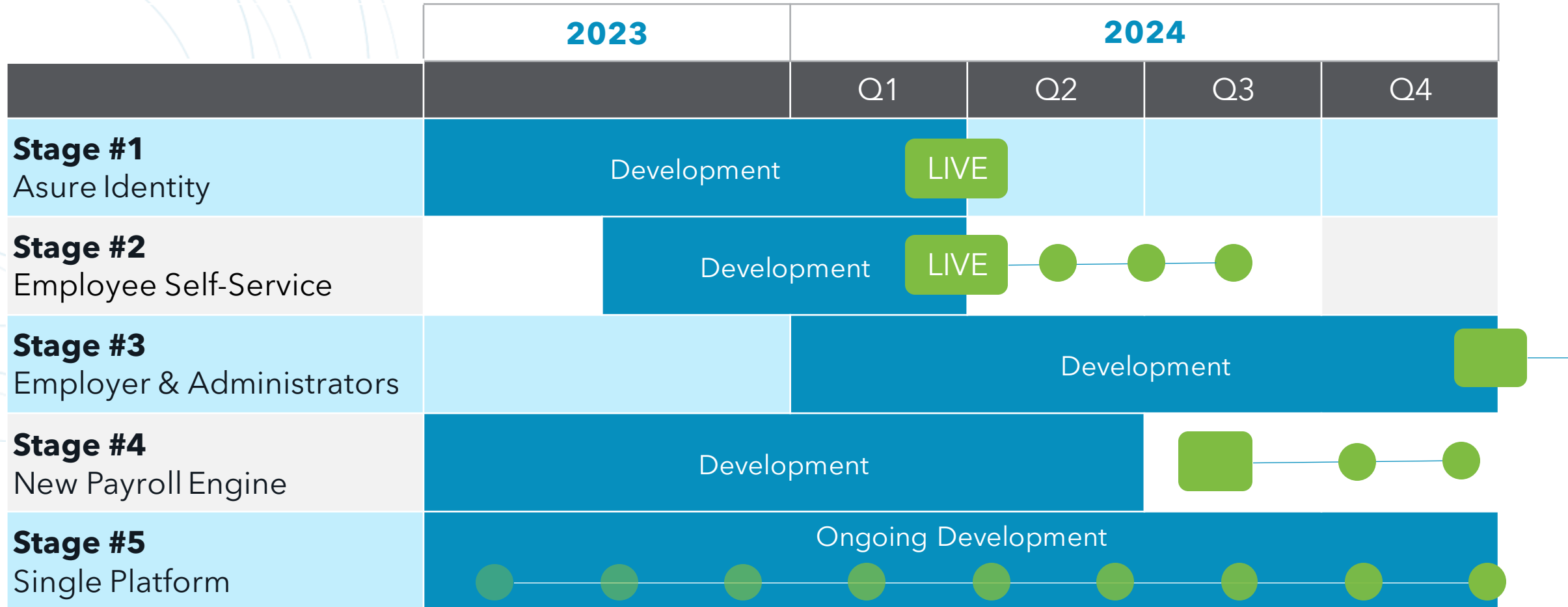


## User Management

Control user access and permissions securely, streamlining administrative tasks and enhancing system security.

[Create New User](#)  
[Organizations](#)  
[Roles](#)  
[User Search](#)

# Development Roadmap





# API Strategy: A modern approach



# Employee Self-Service APIs

## Total Endpoints: 193

- Application APIs: 65 endpoints
- Domain APIs: 65 endpoints
- GraphQL: 38 query/mutations
- AzureID APIs: 25 endpoints

## Domain Apis 1.0.0 OAS 3.0

Domain API specifications

[Contact the developer](#)

Apache 2.0

Servers

TBD - API contracts to be used by domain api

Authorize



### employee Operations for employee endpoints

GET

/employees/{employee-id} retrieves a specific employee for a passed employeeid



PATCH

/employees/{employee-id} patches a specific employee for a passed employeeid



GET

/employees/{employee-id}/profile/contacts get an employee contact record.



POST

/employees/{employee-id}/profile/contacts create an employee contact record



PATCH

/employees/{employee-id}/profile/contacts/{contact-id} patches an employee contact record



DELETE

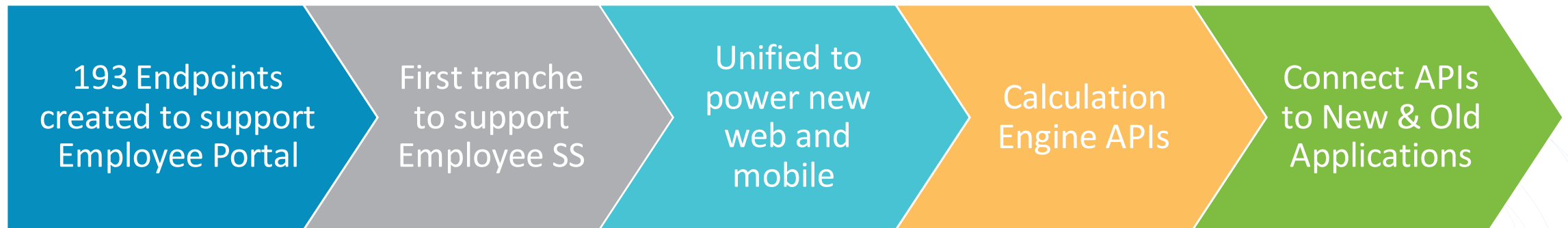
/employees/{employee-id}/profile/contacts/{contact-id} delete an employee contact record



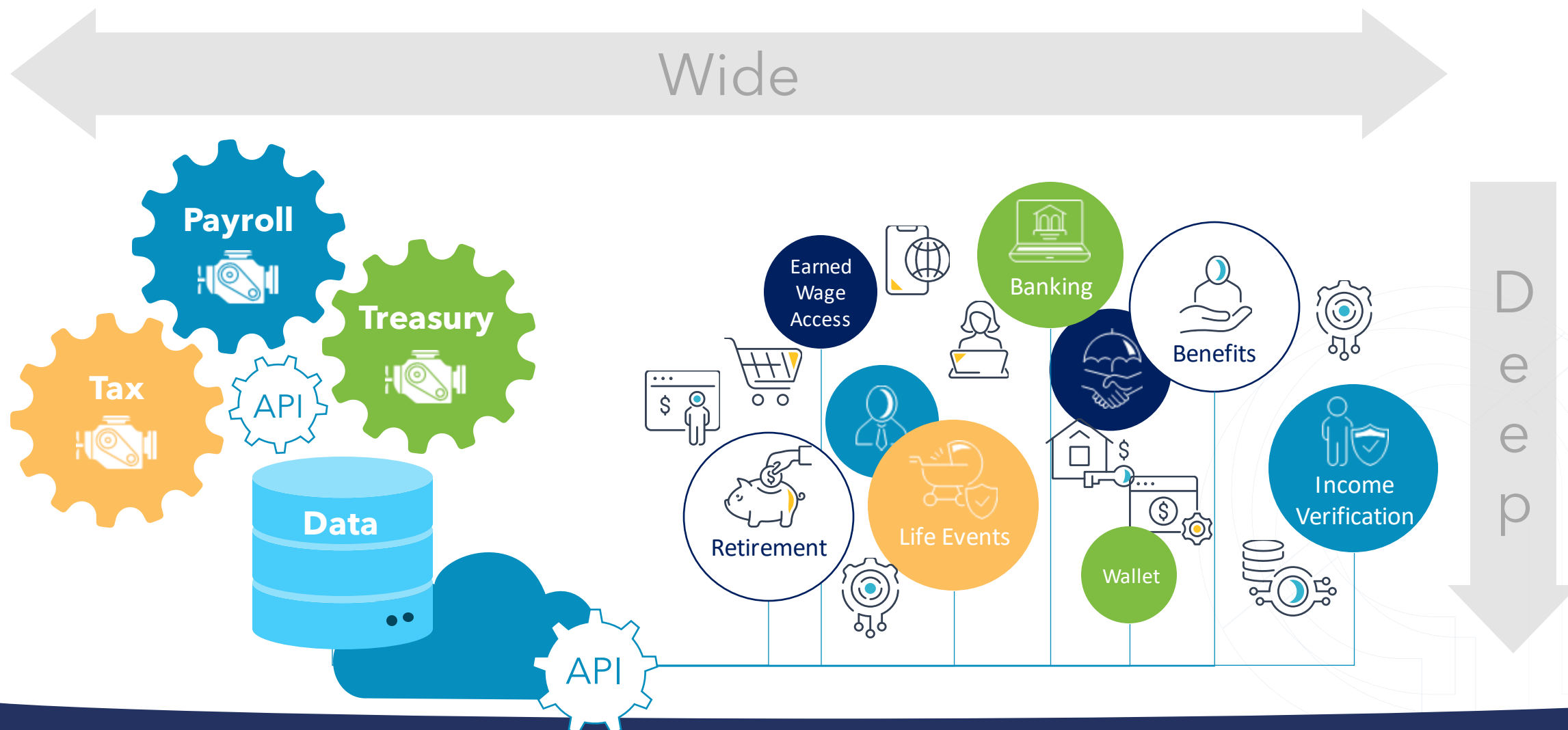


# CICD

## Continuous Improvement Continuous Development



# Tech Stack so you can go...



# Payroll Engine Validation

Asure

Output File Info

Output File Name: PEoutput070722.json

File Run Time: 20 seconds

File Submit Time: 2024-05-21T16:22:16

Number of batches: 1

Number of employees: 47

Number of checks: 47

Number of errors: 0

Number of warnings: 0

Drop or select JSON file

UPLOAD

Check Selector

RESET FILTERS

Batch ID	Employee ID	Check ID	Period End Date	Cash Gross	Net Pay	Errors	Warnings
932d90... eda6-4ccl-9f78-c17540...	10	<a href="#">ef274ec0-q048-4c02-9e8a-d8e408cdfcaf</a>	2022-07-02	\$1,982.0...	\$1,102.26	0	0
932d90... eda6-4ccl-9f78-c17540...	100	<a href="#">cb07-48a8-d5c5...</a>					
932d90... eda6-4ccl-9f78-c17540...	110	<a href="#">974fe-bcb7...</a>					
932d90... eda6-4ccl-9f78-c17540...	120	<a href="#">11e174-q645...</a>					

Asure

< BACK

Check Info

Check ID: 974fe7b3-f046-4ef5-bcb7-6cfdfdc709bd

Employee ID: 110

Cash Gross: \$741.60

Net Pay: \$634.71

Net Check: \$634.71

DOWNLOAD PDF

Earnings

Code

E21

E01

Deductions

Code

Check Info

Check ID: 974fe7b3-f046-4ef5-bcb7-6cfdfdc709bd

Employee ID: 110

Cash Gross: \$741.60

Net Pay: \$634.71

Net Check: \$634.71

Earnings

Code	Type	Description	Rate	Hours	Amount
E21	Regular	Holiday	15.45	8	\$123.60
E01	Regular	Regular Earnings	15.45	40	\$618.00

Deductions

Code	Type	Description	Priority	Amount	Shortfall
UD01	Regular	Union Dues	1	\$4.80	\$0.00

Taxes

Code	State	Locality	Type	Description	Gross	Taxable	Gross Tips	Taxable Tip	Amount	Shortfall
FITW			Fed EE Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$32.62	\$0.00
SS			Fed EE Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$45.98	\$0.00
MED			Fed EE Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$10.75	\$0.00
FUTA			Fed ER Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$4.45	\$0.00
SS-R			Fed ER Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$45.98	\$0.00
MED-R			Fed ER Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$10.75	\$0.00
VT	VT		State EE Tax		\$741.60	\$741.60	\$0.00	\$0.00	\$12.74	\$0.00

# Live Demonstration

## @ The Solutions Showcase

Legacy vs. New



Process Payrolls



Review Results



View Checks

# Record

2024-06-04 22:27 UTC

Recorded by

Christopher Meseke

Organized by

Christopher Meseke



# Artificial Intelligence: A revolutionary approach





AWS Application  
Modernization Lab



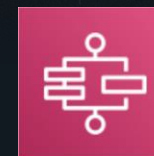
Amazon Web  
Services

+



Lambda  
Function

+



Step  
Function

=



30k emp  
<4 min

# Quicksight

2024-06-04 21:19 UTC

Recorded by

Yan Vaillancourt

Organized by

Yan Vaillancourt

# Asure's AI Journey

## Post Call Analytics

Understand and enhance the customer support experience through AWS Gen AI to identify trends and pain points to prioritize features for our development roadmap.

## Digital Assistant

Handles both application-related and general HCM and Tax Questions.  
Process Actions on your behalf

## QuickSight Gen BI

Empower Clients to access their data and build reports in natural language.

# Meet Luna!



Your Payroll & Tax Digital Assistant



Hi, I'm Luna!



how do I process quarter end in aptm?

10:47:32 AM



Luna, the Asure Software Assistant here. To process quarter end in Asure PTM, you can follow these steps:

1. Review the Client Agency Report: Run the Client Agency Report to review the following items: \* Applied For IDs: Resolve any pending applied-for jurisdictions. \* State Unemployment Rates: Confirm the accuracy of SUI rates to prevent notices and overpayments. \* Agency Frequencies: Verify deposit frequencies to avoid amendments and penalties. \* IRS Name Controls: Ensure clients have assigned name controls for electronic filing. \* Third-Party Filing Authorization: Obtain authorization for Asure PTM to file returns.
2. Verify Mid-Quarter Start Clients: Ensure mid-quarter start clients have submitted prepay payrolls and prior quarter-end files.
3. Submit Prior Quarter Refund Forms: Process refund forms before the deadline per the quarter-end calendar.
4. Send Termination Forms: Send termination forms for clients no longer with the service by the 15th of the month before quarter end.
5. Provide Pre-Quarter End File: Submit a pre-quarter end file to Asure PTM to run pre-QE phase 2 and phase 5.

Additionally, you can refer to the Quarter End Phases

# Asure Luna Demo

2024-06-05 04:32 UTC

Recorded by

John Canada

Organized by

Yasmine Rodriguez