



# Evolution Roadmap

---



2023 Asure Reseller Partner Conference



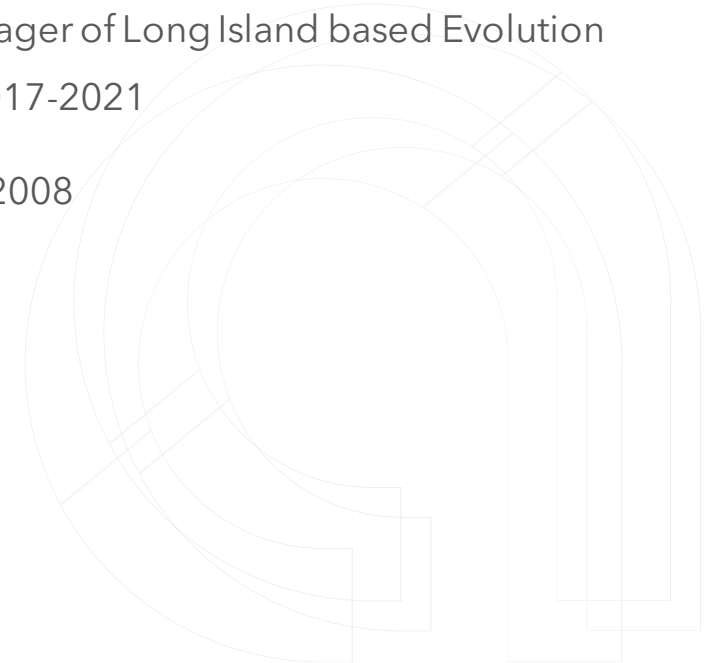
# Speaker Introduction



## Christian Franklin

Product Owner/Manager

- Over 15 years in Payroll and Tax
- Returned to Asure Software in October of 2021
- Former General Manager of Long Island based Evolution SBO, Starpay from 2017-2021
- Evolution user since 2008



# Agenda

01

Focus  
Groups

02

Evolution  
Roadmap

03

Asure  
Identity

04

Conclusion



# Focus Groups



# Focus Groups



- Thank you to all who participated!
- Six groups: Payroll, HR, TLM, Integrations, Reports, Tax
- Met monthly to white board ideas



The background features a vibrant orange color with a network of white lines and arrows. Various white icons are scattered across the top, including a checklist, a computer monitor with a bar chart, a line graph, a magnifying glass over a bar chart, a lightbulb, a target, and a document with a pencil. In the bottom right corner, there is a realistic illustration of a desk setup: a laptop keyboard, a blue notebook with a smartphone on top, and a black pen.

# Focus Groups

- Each product team reviewed the top 5 ideas from each group
- Realized we needed to expand the focus groups to include more users at source
- Employee and customer focused
- Integrating into development cycle Aha! suite which will provide crowd sourced feature priorities
  - Roadmap views
  - Up voting of features
  - Delighters each month
  - Strategic objectives
  - Views of customer feedback and global requests
  - Q4 rollout

# We Heard You

01

## Employee and Customer Focused

- Allows Asure and partners of Asure to view customer feedback
- Find out what your clients and their employees really want
- Automatic notifications to idea submitters when the status of their idea changes

02

## Improved Transparency

- Roadmap views - customized to show what is being worked on and what is to come
- Crowdsource customer feedback - partners and their clients will be able to participate
- Strategic objectives

03

## Prioritize the Highest Value Features

- Up voting of features
  - Development based on employee and customer needs



The title 'Evolution Roadmap' is written in a large, bold, blue, sans-serif font. It is positioned in the lower half of the image, which has a white background with a subtle pattern of overlapping circles and lines on the left side.

# Evolution Roadmap



## Evolution Roadmap

- Performance and stability
- Security
- Improved organization management



# Evolution Roadmap

01

## Client-Side Stability & Performance

- Updating Evolution to more modern back-end code version
- Improved processing times
  - ACH (instead of processing multiple files can generate one file)
  - Task Queue
  - Example: 5000 ACH transactions in under 10 minutes

02

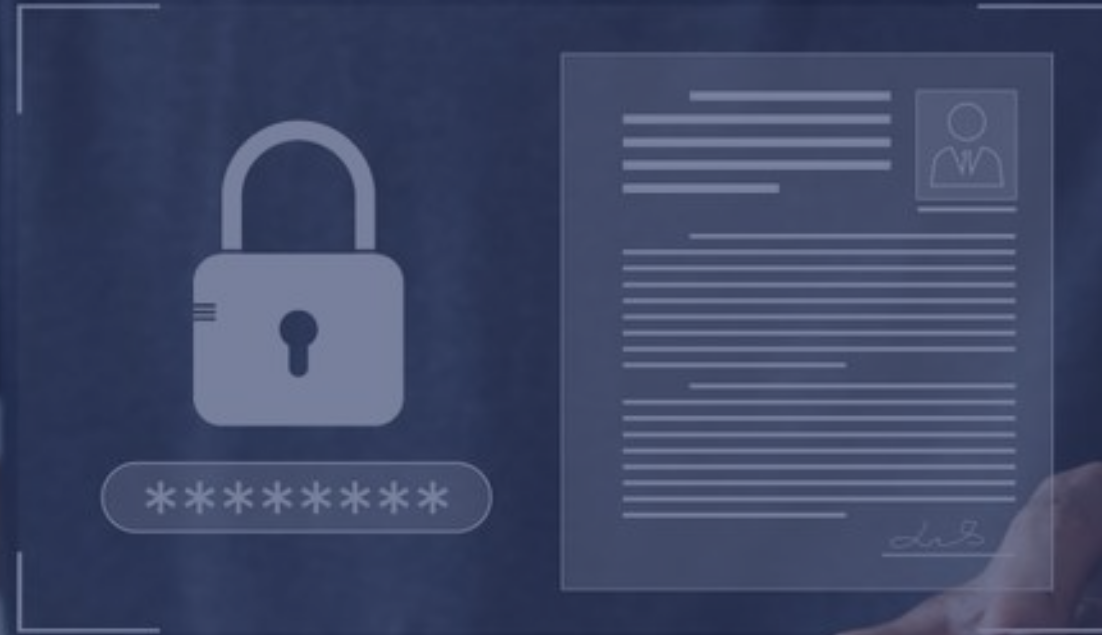
## APTM Integration Improvements

- Simplifying the workflow for APTM customers
- W2s - print and mail service for 2023
- If on self-service - print W2s out of one system
- Enhanced deltas for seamless customer creation and updates

03

## Asure Identity

- Changing the way users' access Asure systems
- Pre-work needed for successful rollout
- Asure Task Force ready to assist partners with the rollout



# Asure Identity

# Asure Identity

01

## Evolution Asure ID Task Force

- Team dedicated to assisting partners with the changes to Evolution
- We will make sure you are ready

02

## Changes to Users & Security Groups

- Review existing users in Evolution
- Individual user rights are going away
- Security groups need to be reviewed
  - Group right comparison
  - V-lookups

03

## Visualizing Access vs Access

- See what a user does
  - User looked at bank accounts
  - User looked at employee records
- Track changes a user does
  - User updated a field



# Changes to Users and Security Groups

- Moving individual rights into groups
- Group classifications
- Users no longer have DBDT, Email and Templates
- Fields that remain:
  - Accountant
  - Service Location
  - User Signature
- New user type - System
- Users are individuals not what they can do in the system
- Alternative role views
- All separate accounts merged into one single user
  - User to login to Evolution Web, ESS, Evolution



# Visualizing Access vs Access

- An employee logs into a payroll system for their company and views a list of employee direct deposit accounts.
- An employee logs into a payroll system for their company and views the salary or pay rates of other employees.
- A payroll CSR views accounts they normally do not handle.
- What did a user look at?



# Visualizing Access vs Access

- A user can be setup to have access to certain menus and screens.
- A user is only able to see certain companies.
- A user is only able to see certain fields (i.e., pay rates are not visible to certain users).
- What can a user do?





# Evolution Asure ID Task Force







# Evolution Asure ID Prework



## Evolution Asure ID Prework

Prepare for changes to users and  
security groups



# Evolution Asure ID Prework



## Review Users

- What is your termination policy?
- When was the last time you reviewed active users?



## Review Security Groups

- Determine the individual user rights/permissions needed to define groups.



## Determine Classifications

- A level above groups
- Helps categorize multiple types of groups - i.e., Finance classification could have reconciliation and cash groups



## Phone & E-mail Requirement

- Every user is required to have an email and a phone number for MFA



## Evolution Integration Changes

- Utilize system users
- Ensure integration tools are updated

# Evolution Asure ID Prework - Users

01

## Termination Policy

- What is your termination policy?
- Employee and client terminations:
  - Remote client users
  - Current or former employees with multiple logins
  - Sales/Demo users

02

## User Overrides

- Individual user rights are being phased out before IAM
- Move individual user rights to groups

03

## User Rights Report (\$1316)

- Move individual rights to groups
- Use report as tool to analyze existing user rights



# Evolution Asure ID Prework - Security Groups

04

## Run New Report to Export Security Groups

- New report export will allow group security rights to be exported.
- Naming convention for groups

05

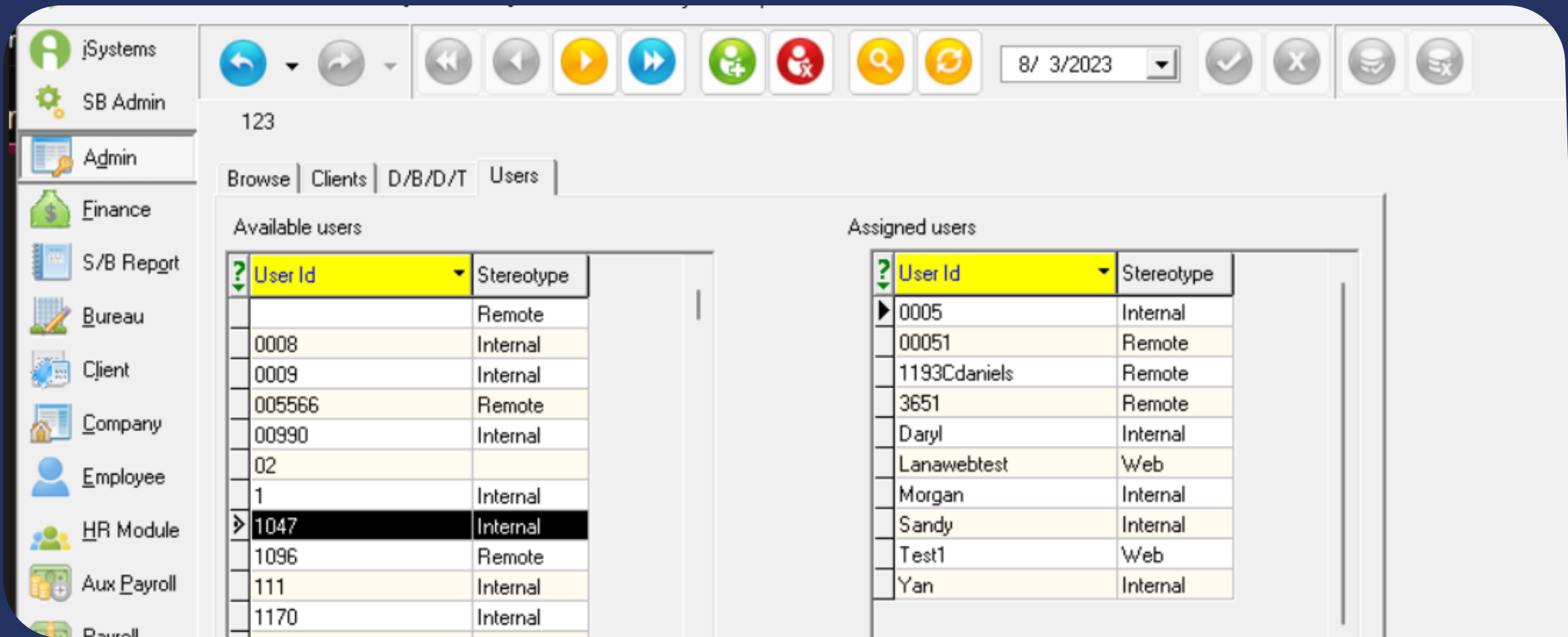
## Group Right Comparison

- Compare existing group security rights
  - Admin - Security - Groups - Users tab to help see users attached to groups
  - V-lookups to help filter the information to provide group right comparison

06

## Security Templates

- Can **no longer** be used to create users
- Can be used to create groups
  - Who is my user?
  - What organization are they in?
  - What applications does the user have access to?
  - What is their role?



123

Browse | Clients | D/B/D/T | Users

Available users

User Id	Stereotype
	Remote
0008	Internal
0009	Internal
005566	Remote
00990	Internal
02	
1	Internal
1047	Internal
1096	Remote
111	Internal
1170	Internal

Assigned users

User Id	Stereotype
0005	Internal
00051	Remote
1193Cdaniels	Remote
3651	Remote
Daryl	Internal
Lanawebtest	Web
Morgan	Internal
Sandy	Internal
Test1	Web
Yan	Internal

# Admin - Security - Groups

# Determine Classifications

- A way to classify groups for users that fall under similar roles
- Finance Classification: Cash Group + Bank Reconciliation Group
- Operations Classification: Payroll Processing + Implementations

User	Organization	Applications	Roles	Classification
Christian	SBO	Evolution, TLM, AHR	Full Access / Access to New Clients	Management, System Admin
Sarah	SBO	Evolution	ACH Processing, Cash management	Finance
John	SBO	Evolution	Bank Reconciliation	Finance
Mary	Client, Company, DBDT	Evolution	Payroll Creation, Editing	Remote Client

# Phone & E-mail Requirement

- Email and cell phone will be required in order to have multi-factor authentication (MFA)
- Will be captured as part of the Just In Time Provisioning
  - Users will enter this information themselves
  - Notify clients + employees of new requirement





# Evolution Integration Changes



Existing legacy integrations like Timeworks Plus (Swipeclock) will need to be updated to use System type users



Check what existing integrations are being used that may require user updates



System user also will apply to things like DESIGNEE and SIGNATURE



Evolution 23.04.00.033 23.04.04.73 [vwdwa102] - Admin - Security - Groups

iSystems  
SB Admin  
Admin  
Finance  
S/B Report  
Bureau  
Client  
Company  
Employee  
HR Module

Aaa

Browse Clients D/B/D/T Users

Group Security rights (Aaa)

System templates: [ ] SB templates: [ ]

- +... + Admin (Enabled) (Enabled: 2; Disabled: 3)
- +... + Aux Payroll (Enabled) (Enabled: 11)
- +... + Bureau (Enabled) (Enabled: 12; Read-only: 2; Disabled: 14)
- +... + Client (Enabled) (Enabled: 17; Disabled: 2)
- +... + Company (Enabled) (Enabled: 42; Read-only: 6; Disabled: 21)
- +... + Employee (Enabled) (Enabled: 12)
- +... + Finance (Enabled) (Read-only: 2; Disabled: 5)
- +... + HR Module (Enabled) (Enabled: 26; Disabled: 2)
- +... - iSystems (Disabled) (Disabled: 45)

Save  
Cancel  
Undo  
Show top  
Show on top

## Templates – Groups Only

# Key Takeaways

01

## Termination Policy

Review existing users by status

02

## User Security Overrides

What rights do users have set at individual level?

03

## Group Right Comparison

What rights do your groups have?  
Can they be combined?

04

## Classifications

What should similar security groups fall under?

05

## Integrations

Review existing integrations for user setup

# Q & A





Allow users to collect Direct Deposit amounts based on DBDT level bank accounts based on the EEs home DBDT.

Same setup as other DBDT level overrides.

**- Evolution Direct Deposits by DBDT**

# Resources & Contact



Office: (802) 923-4021  
Mobile: (802) 528-9833



[christian.franklin@asuresoftware.com](mailto:christian.franklin@asuresoftware.com)



[Asuresoftware.com](https://Asuresoftware.com)





# Thank You!

---



2023 Asure Reseller Partner Conference

