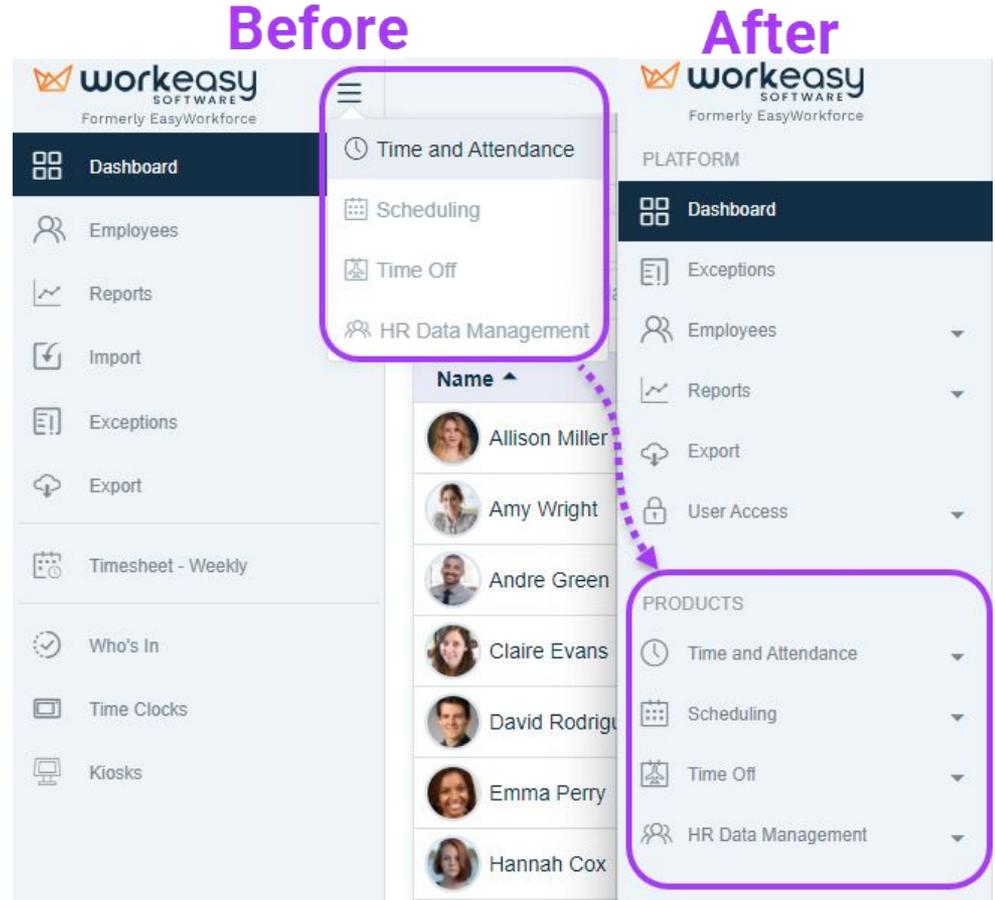


# Left Nav

## Product Selector

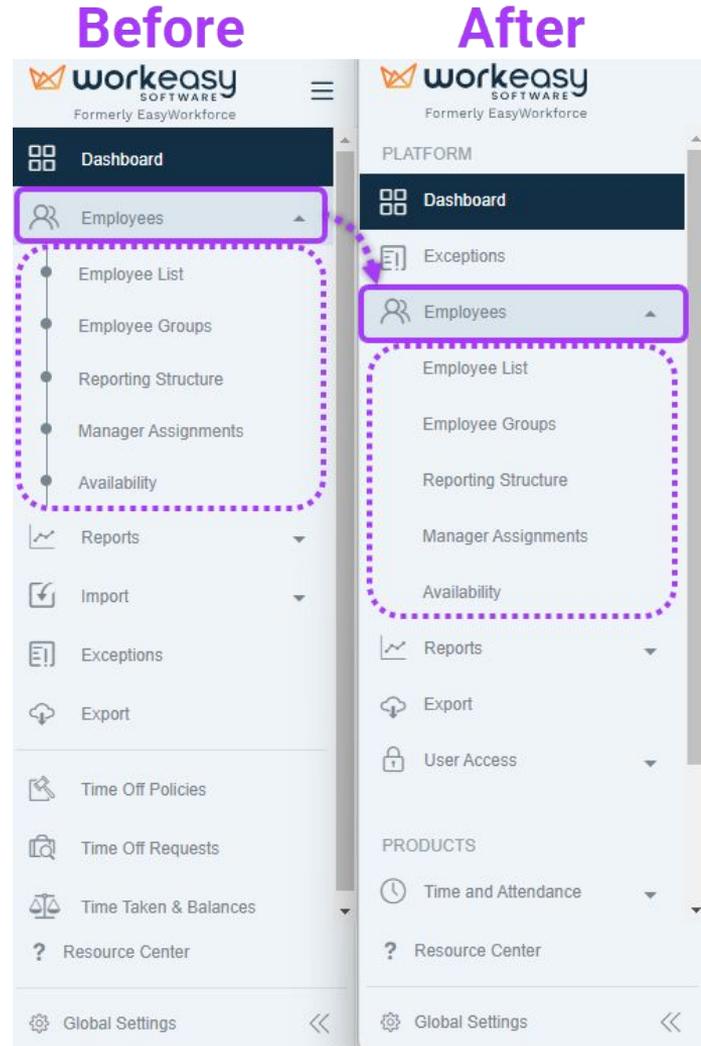
The Product selector is now available in the **Left Nav**.



# Left Nav

## Employees

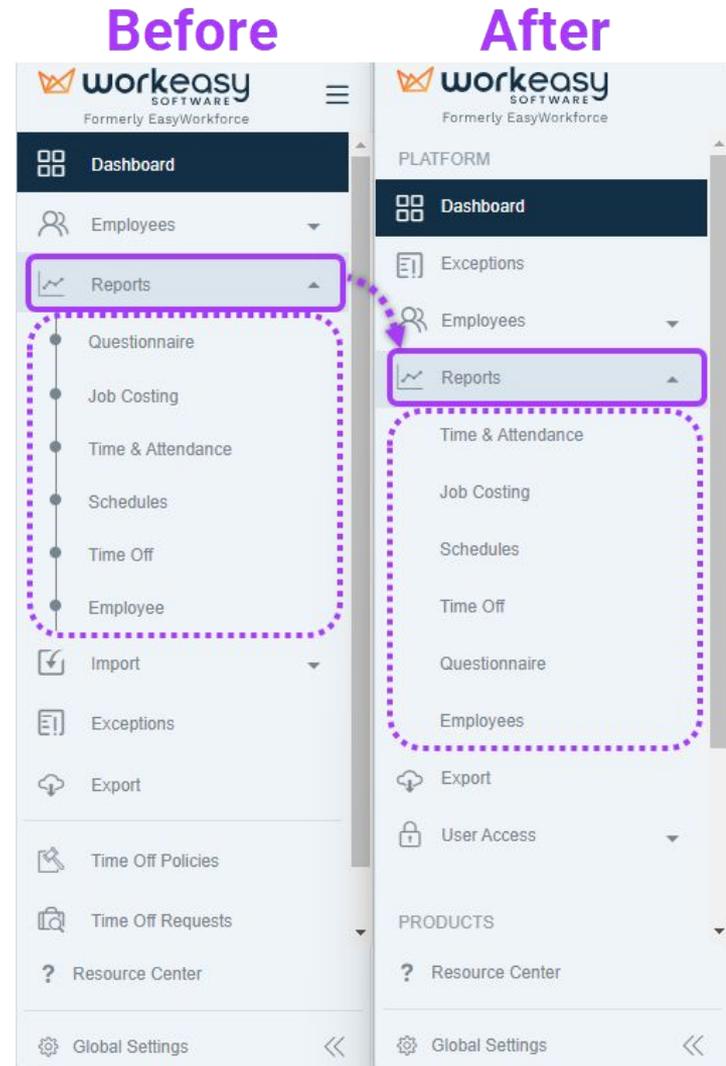
This category was moved from second to third position.



# Left Nav

## Reports

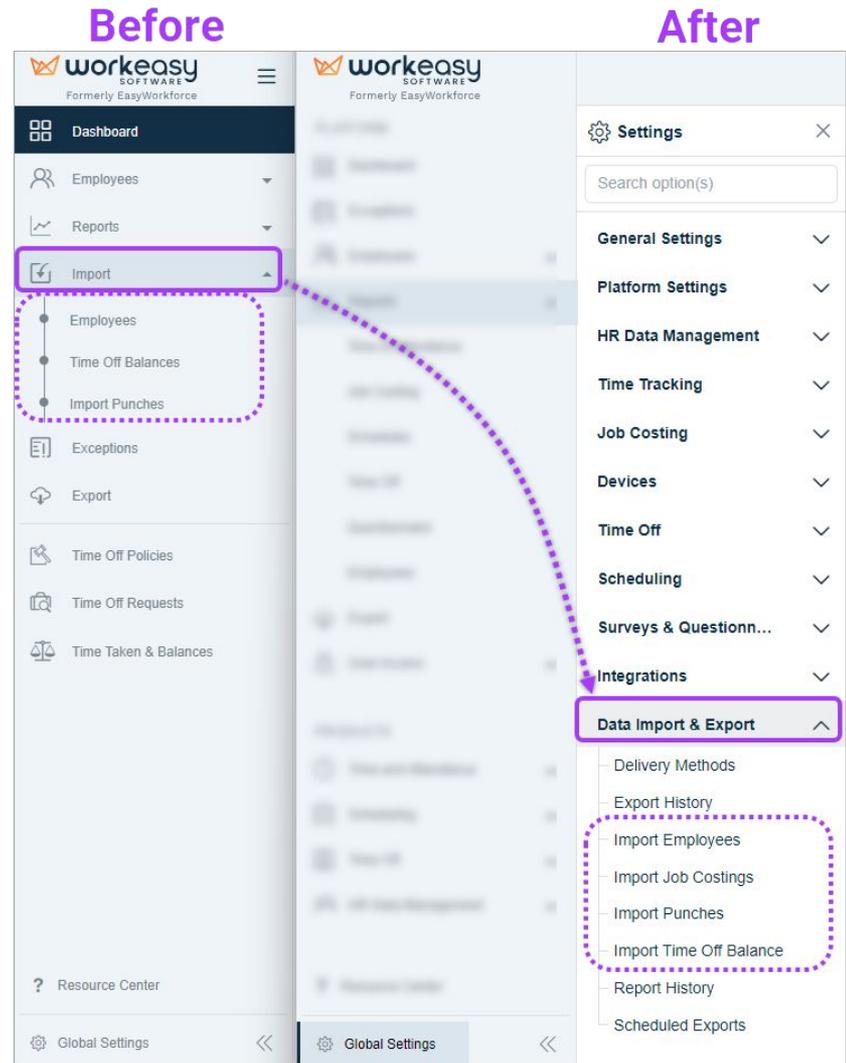
- This category was moved from third to fourth position.
- Its items were rearranged.
- *Employee* is now **Employees**.



# Left Nav

## Import

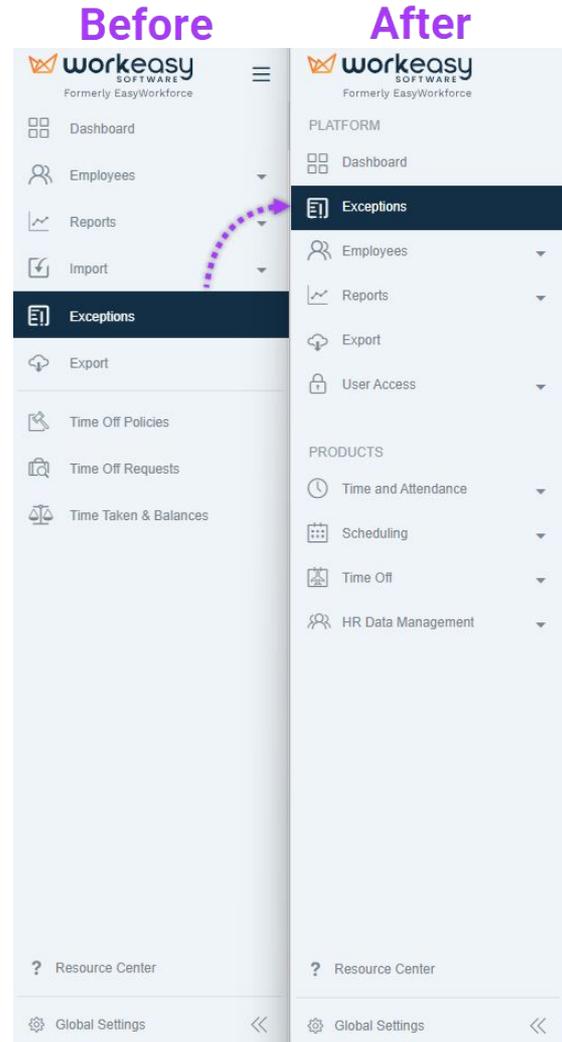
- This category is now a setting, as it was moved from the Left Nav to **Global Settings > Data Import & Export**.
- *Employees* is now **Import Employees**.
- *Time Off Balances* is now **Import Time Off Balance**.
- *Job Costing* is now **Import Job Costings**.
- All settings were alphabetized.



# Left Nav

## Exceptions

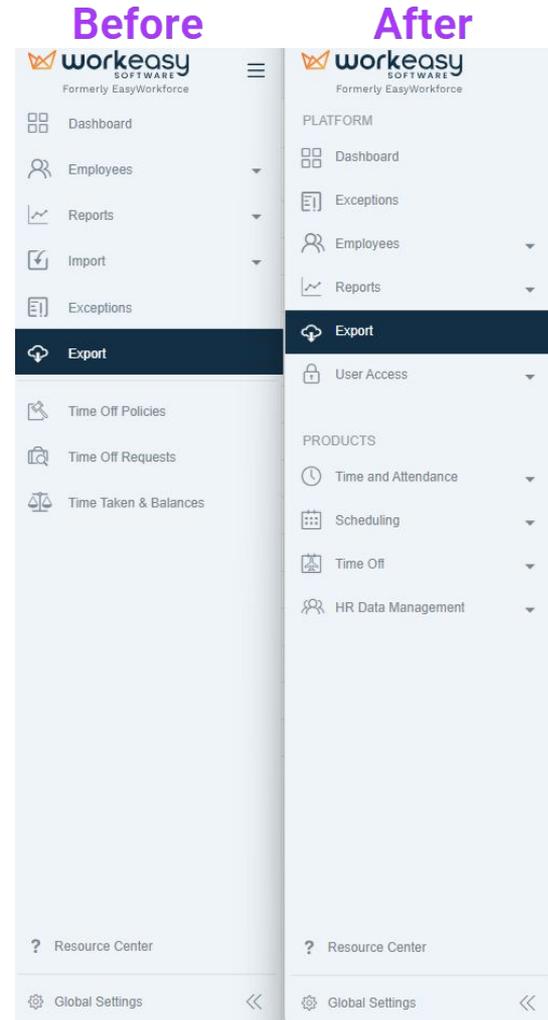
This category was moved from fifth to second position.



# Left Nav

## Export

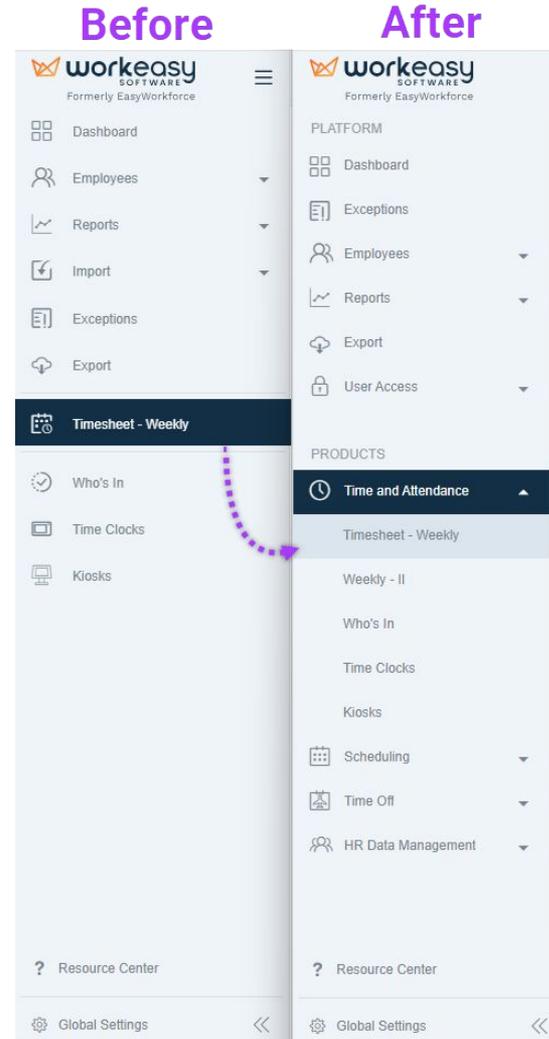
This category was moved from sixth to fifth position.



# Left Nav

## Timesheet

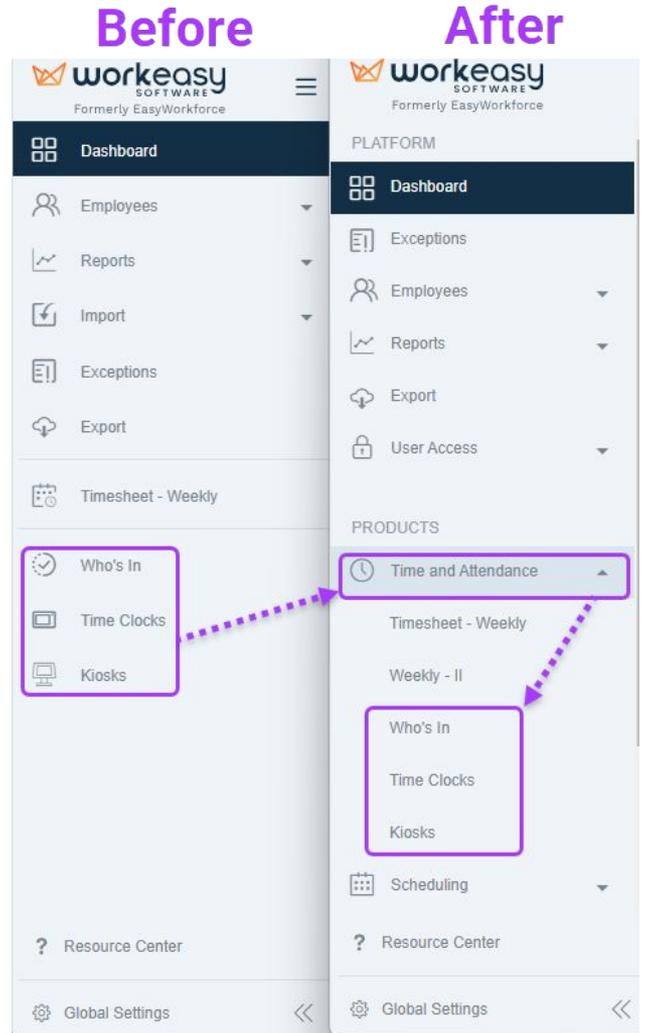
This category was moved to  
**Products > Time and Attendance.**



# Left Nav

## Who's In, Time Clocks, Kiosks

These categories were moved to **Products > Time and Attendance**.



# Left Nav

## Schedule Plans

- This category was moved to **Products** > **Scheduling**.
- Its options were moved to **Scheduling** > **Schedule Plan** and are now tabs above the calendar.

The image shows a side-by-side comparison of the Workeasy software interface, labeled 'Before' and 'After'. In the 'Before' state, the left navigation menu has a 'Locations Plan' section containing a vertical list of items: Shift Planner, Scheduler, Shift Templates, Shift Patterns, Weekly Patterns, and Team Staffing. In the 'After' state, these items have been moved to a 'Scheduling' section in the left menu. Additionally, the 'Scheduler' option is now a tab above the main calendar view, which displays a weekly schedule for 'Sep 29, 2024 - Oct 5, 2024' for an employee named Carmen Alves. A purple dashed arrow points from the 'Scheduler' tab in the 'After' view back to the 'Scheduler' item in the 'Before' view's menu.

**Before**

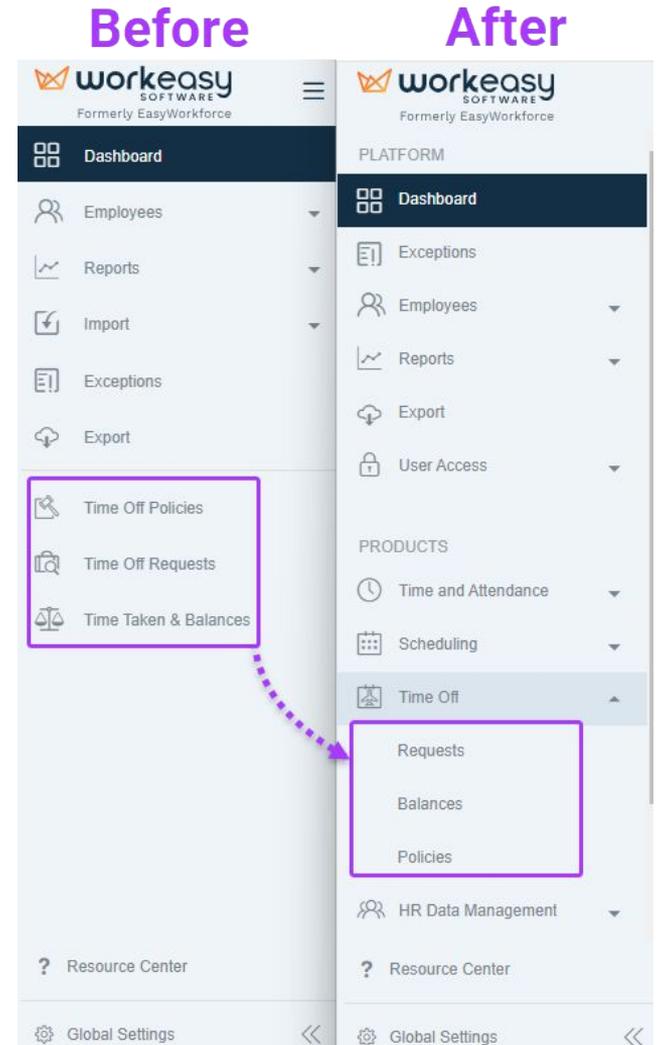
**After**

	Sun, Sep 29	Mon, Sep 30	Tue, Oct 1	Wed, Oct 2
Open Shifts				
CA Carmen Alves 14:00 0:00 \$0.00 \$0.00				

# Left Nav

## Time Off Policies, Time Off Requests, Time Taken & Balances

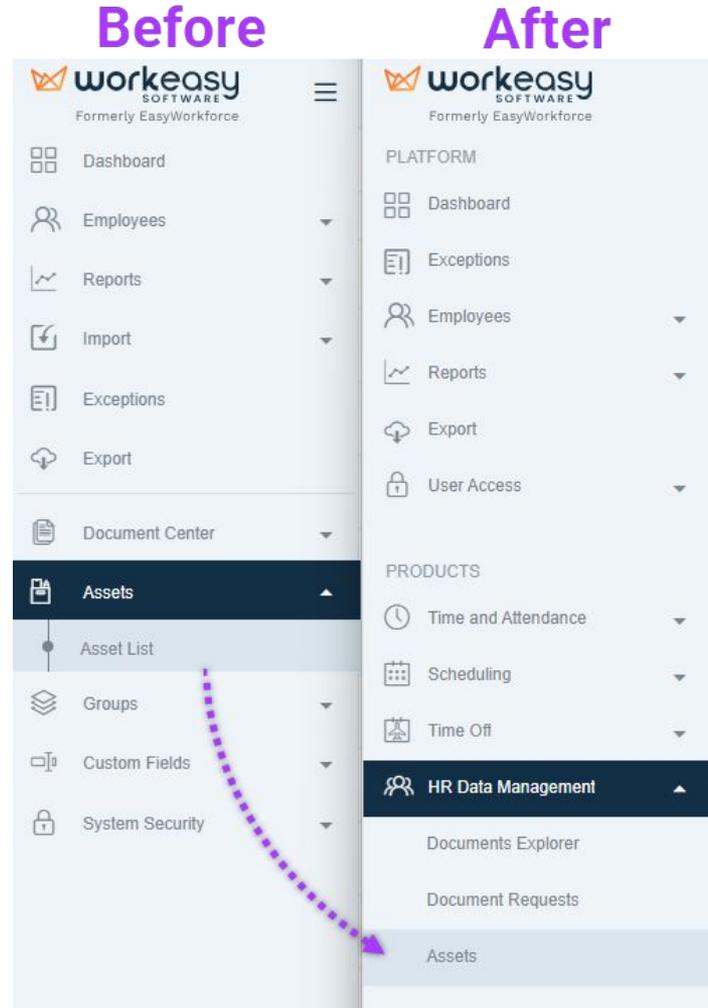
- These categories were moved to **Products > Time Off**.
- *Time Off Policies* is now **Policies**.
- *Time Off Requests* is now **Requests**.
- *Time Taken & Balances* is now **Balances**.



# Left Nav

## Assets

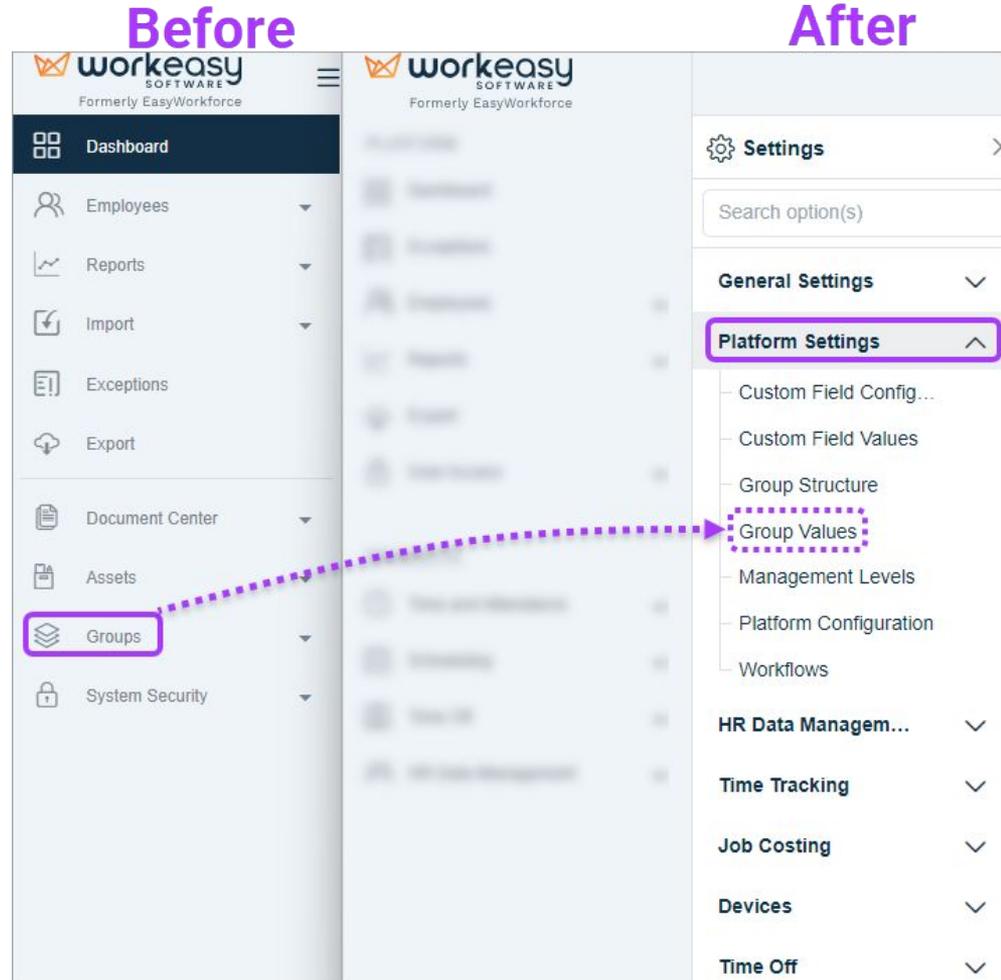
This category was moved to  
**Products > HR Data Management.**



# Left Nav

## Groups

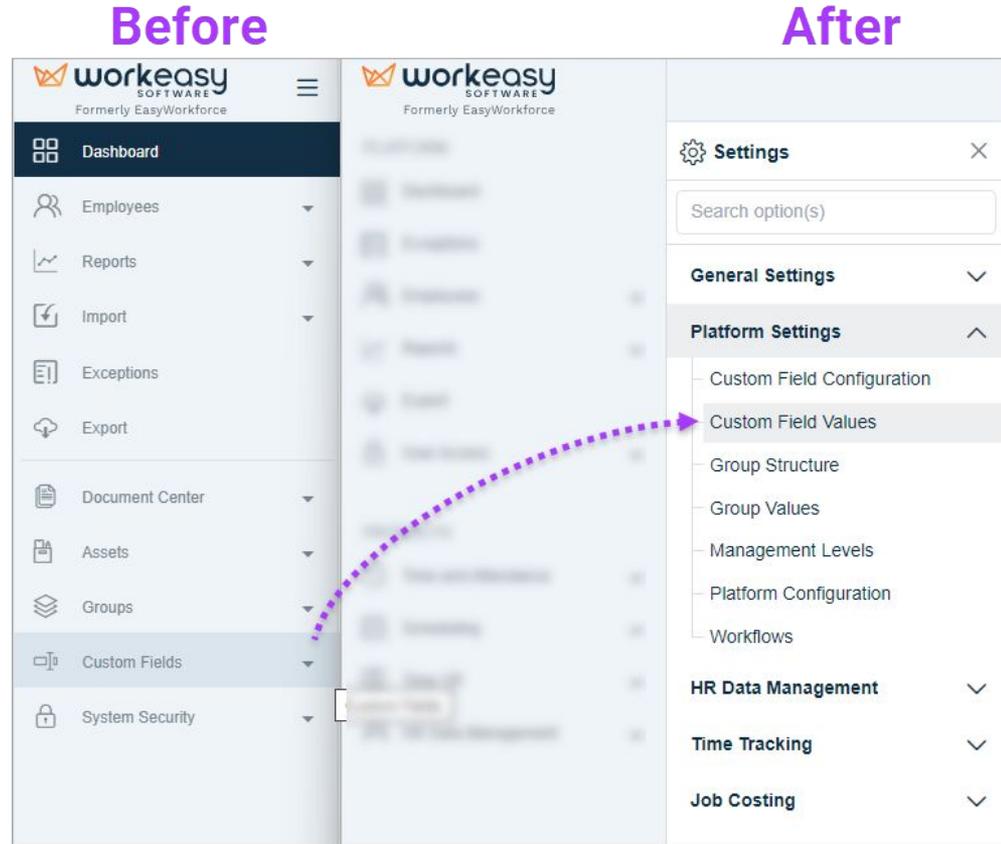
This category was moved to **Global Settings** > **Platforms Settings** and renamed **Group Values**.



# Left Nav

## Custom Fields

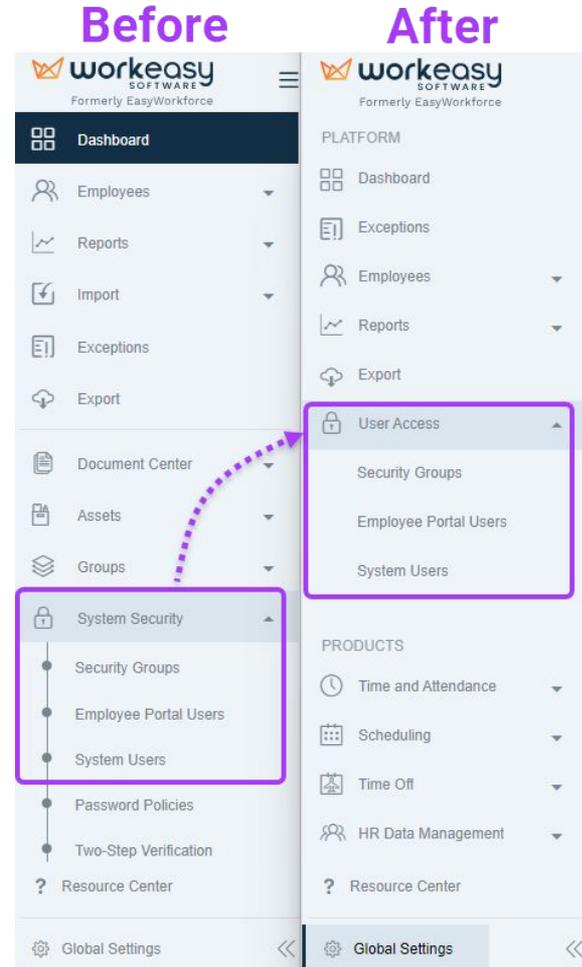
This category was moved to **Global Settings** > **Platforms Settings** and renamed **Custom Field Values**.



# Left Nav

## System Security

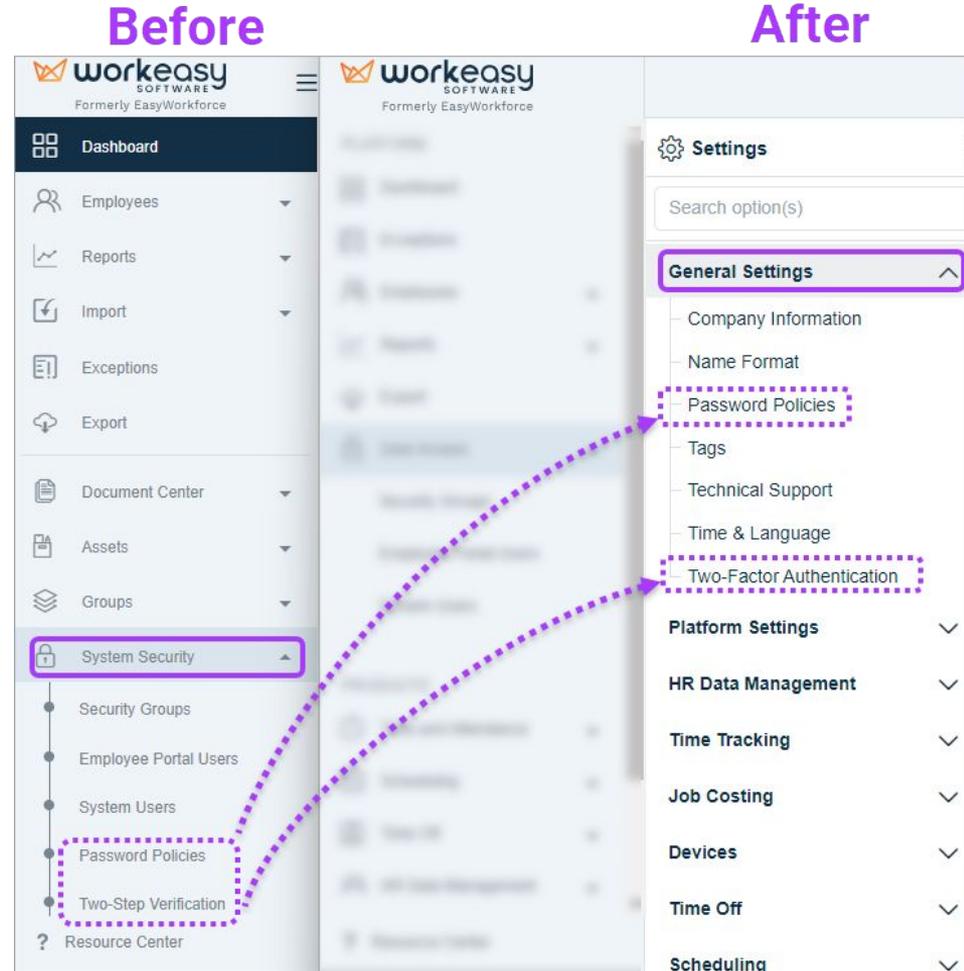
*Security Groups, Employee Portal Users, and System Users were moved to **User Access**.*



# Left Nav

## System Security

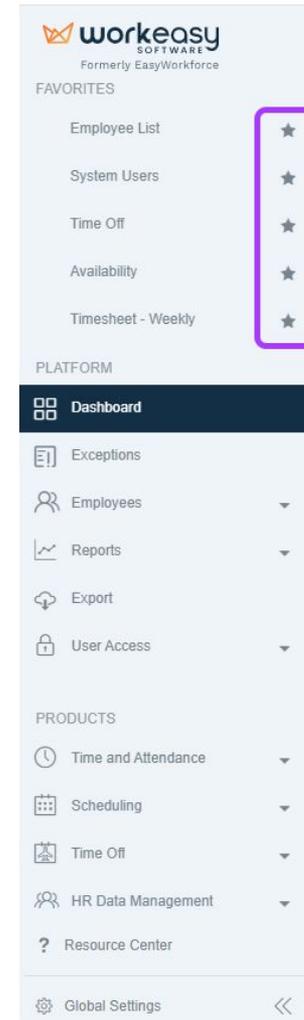
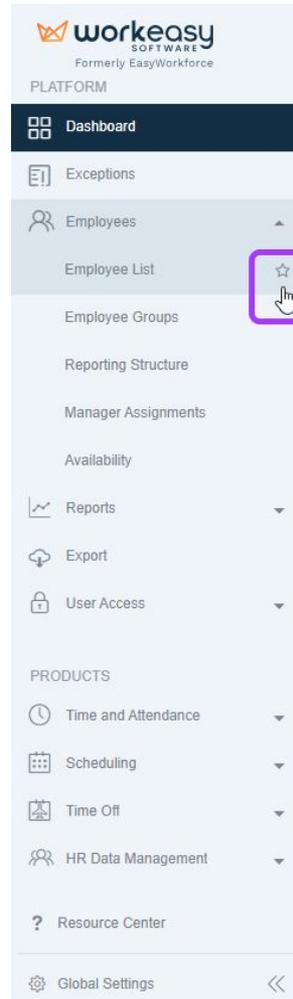
- *Password Policies* and *Two-Step Verification* were moved to **Global Settings > General Settings**.
- *Two-Step verification* was renamed **Two-Factor Authentication**.



# Left Nav

## Favorites

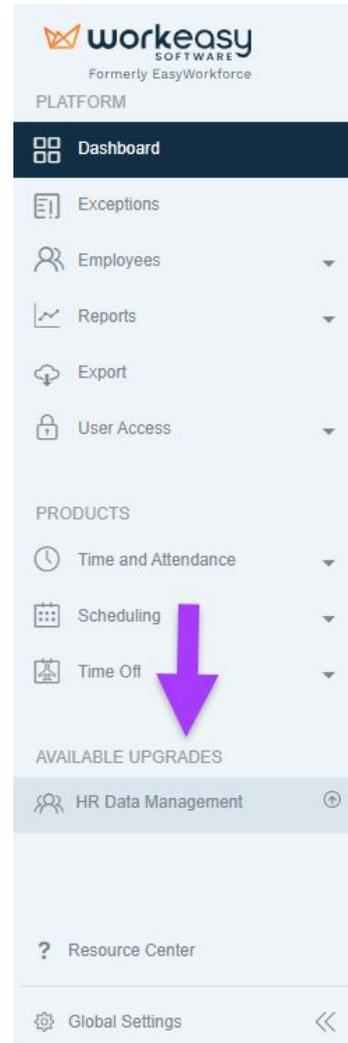
This new feature allows users to mark up to five specific items as **Favorites** ★, making it easier to access frequently used items quickly.



# Left Nav

## Available Upgrades

This option is soon to be available for users with access to manage employees.



# Global Settings

## Advanced Settings

This setting was moved to **Platform Settings** and renamed **Platform Configuration**.

**Before**

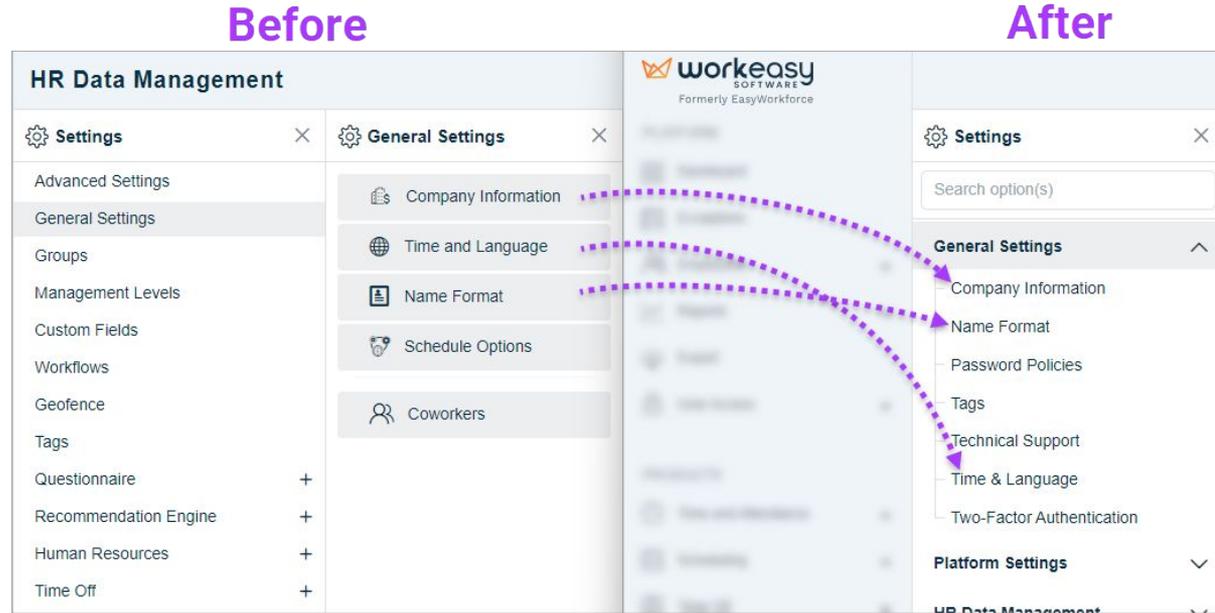
**After**

The image shows a side-by-side comparison of the 'Settings' menu in the 'HR Data Management' section of the 'workeasy' software. The 'Before' state shows a list of settings including 'Advanced Settings', 'General Settings', 'Groups', 'Management Levels', 'Custom Fields', 'Workflows', 'Geofence', 'Tags', 'Questionnaire', 'Recommendation Engine', 'Human Resources', 'Time Off', 'Employee Scheduling', 'Time and Attendance', 'Time Clocks', and 'Kiosks'. The 'Advanced Settings' option is highlighted with a purple box. A purple dotted arrow points from this box to the 'Platform Configuration' option in the 'After' state. The 'After' state shows the 'Settings' menu with a search bar and several categories: 'General Settings', 'Platform Settings', 'HR Data Management', 'Time Tracking', and 'Job Costing'. The 'Platform Settings' category is expanded, showing sub-options: 'Custom Field Configuration', 'Custom Field Values', 'Group Structure', 'Group Values', 'Management Levels', 'Platform Configuration', and 'Workflows'. The 'Platform Configuration' option is highlighted with a purple box.

# Global Settings Before & After

## General Settings

*Company Information, Name Format, and Time and Language were moved to the **General Settings** categories menu and alphabetized.*



# Global Settings

## General Settings

- *Schedule Options* and *Coworkers* were moved to **Scheduling**.
- *Schedule Options* was renamed **Recommendation Periods**.

**Before**

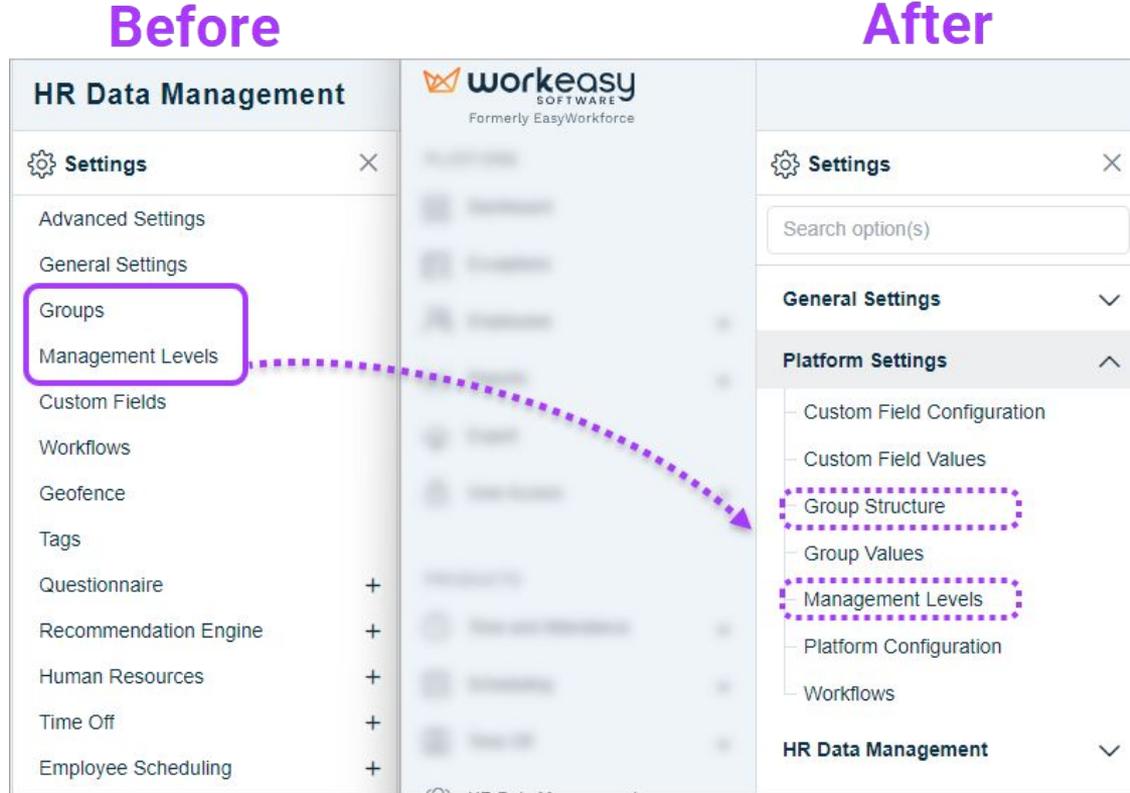
**After**

The image illustrates the changes in the HR Data Management settings interface. In the 'Before' state, the 'Settings' menu on the left includes 'Schedule Options' and 'Coworkers'. The 'General Settings' panel on the right shows 'Schedule Options' and 'Coworkers' as active items. Dotted purple arrows point from these items to the 'After' state. In the 'After' state, the 'Settings' menu on the left has 'Scheduling' expanded, showing 'Coworkers' and 'Recommendation Assistant' (renamed from 'Schedule Options'). The 'General Settings' panel is no longer visible.

# Global Settings

## Groups, Management Levels

- These settings were moved to **Platform Settings**.



# Global Settings

## Custom Fields, Workflows

- These settings were moved to **Platform Settings**.
- *Custom Fields* was renamed **Custom Field Configuration**.

The image shows a side-by-side comparison of the 'HR Data Management' settings menu in the 'Before' and 'After' states. The 'Before' state shows a list of settings including 'Custom Fields' and 'Workflows'. The 'After' state shows the same menu with 'Platform Settings' added, and 'Custom Fields' renamed to 'Custom Field Configuration'. Dotted purple arrows indicate the movement of 'Custom Fields' to 'Custom Field Configuration' and 'Workflows' to 'Workflows'.

**Before**

HR Data Management

Settings

- Advanced Settings
- General Settings
- Groups
- Management Levels
- Custom Fields
- Workflows
- Geofence
- Tags
- Questionnaire +
- Recommendation Engine +
- Human Resources +
- Time Off +
- Employee Scheduling +
- Job Costing +

**After**

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Settings

Search option(s)

- General Settings
- Platform Settings
- Custom Field Configuration
- Custom Field Values
- Group Structure
- Group Values
- Management Levels
- Platform Configuration
- Workflows
- HR Data Management
- Time Tracking

# Global Settings

## Geofence

This setting was moved to **Time Tracking** and renamed **Geofences**.

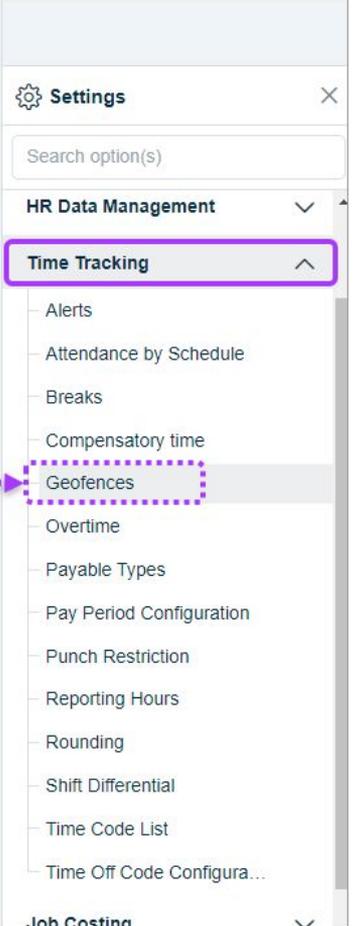


**Before**

HR Data Management

- Settings
- Advanced Settings
- General Settings
- Groups
- Management Levels
- Custom Fields
- Workflows
- Geofence**
- Tags
- Questionnaire
- Recommendation Engine
- Human Resources
- Time Off
- Employee Scheduling
- Job Costing
- Time and Attendance
- Time Clocks
- Kiosks
- GroupClock
- Export

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**After**

Settings

Search option(s)

HR Data Management

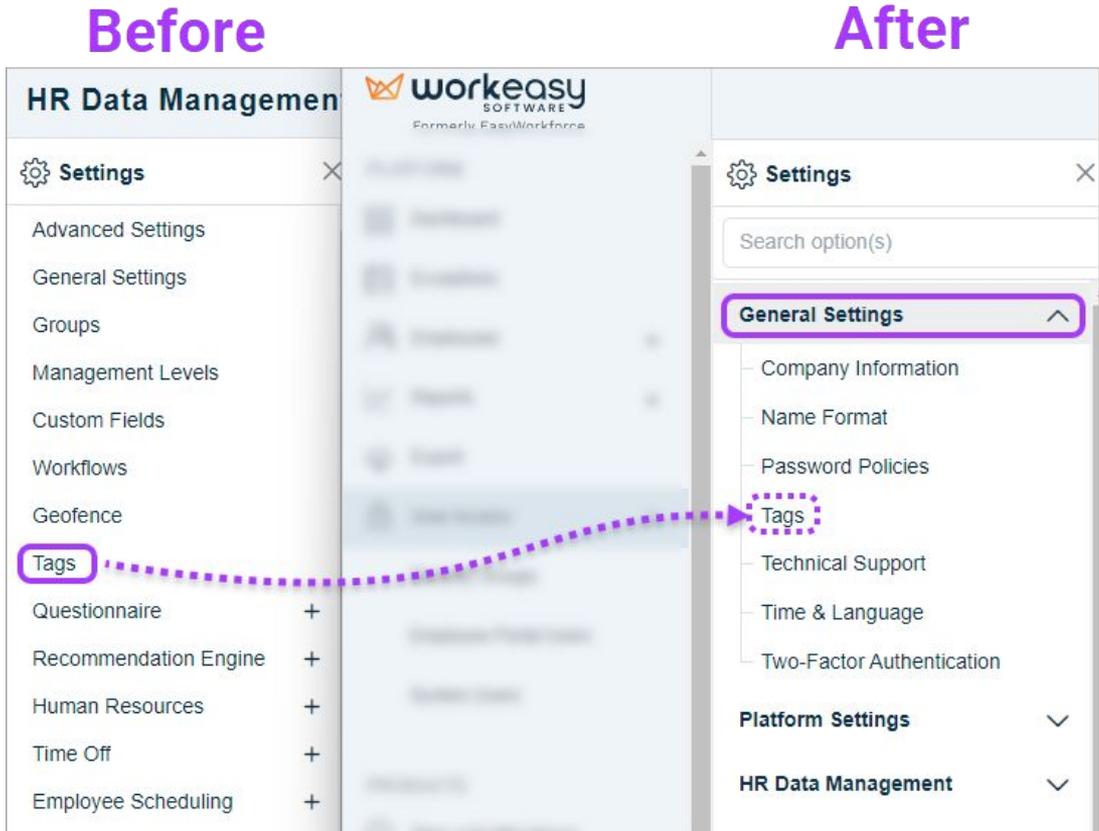
- Time Tracking**
- Alerts
- Attendance by Schedule
- Breaks
- Compensatory time
- Geofences**
- Overtime
- Payable Types
- Pay Period Configuration
- Punch Restriction
- Reporting Hours
- Rounding
- Shift Differential
- Time Code List
- Time Off Code Configura...

Job Costing

# Global Settings

## Tags

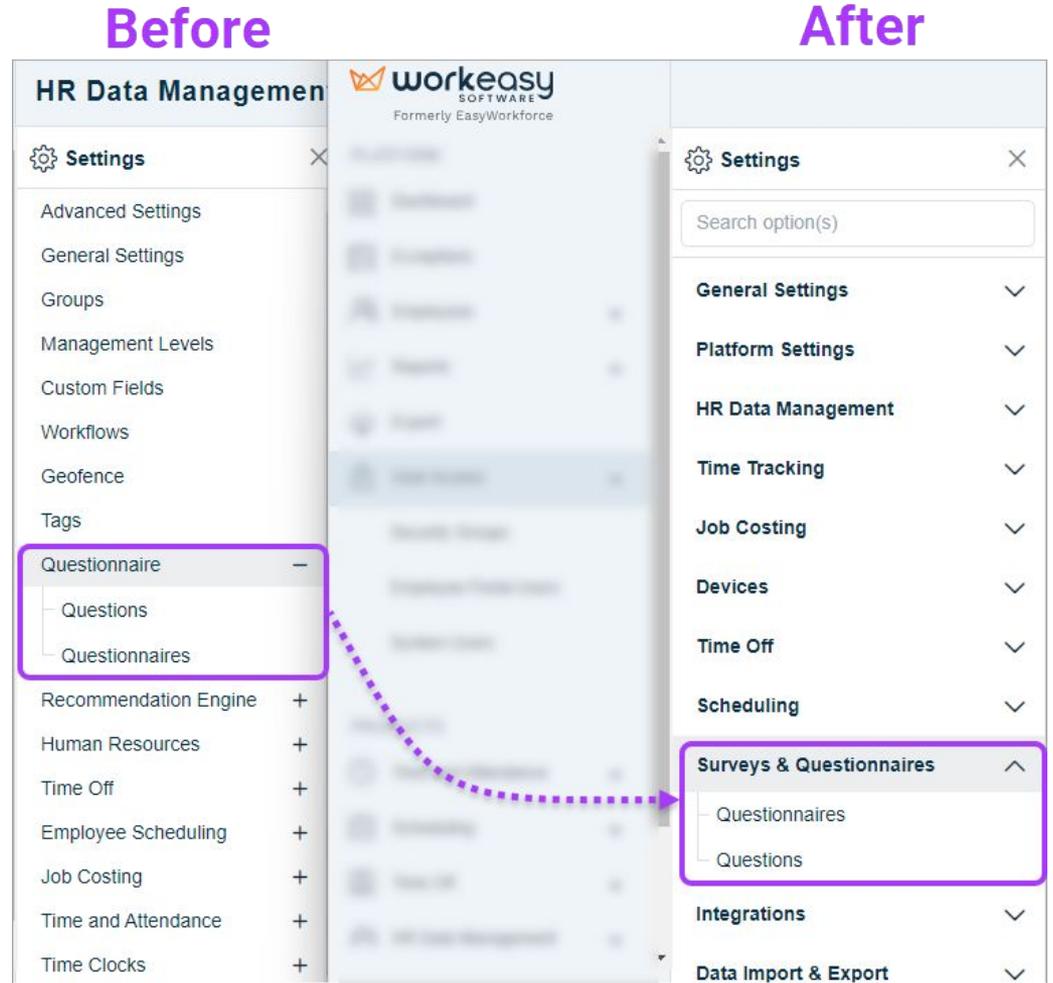
This setting was moved to **General Settings**.



# Global Settings

## Questionnaire

This setting was renamed  
**Surveys & Questionnaires.**



# Global Settings

## Recommendation Engine, Employee Scheduling

- These settings were combined and renamed **Scheduling**.
- *Rules* was renamed **Recommendation Rules**;  
*Engines* was renamed **Recommendation Assistant**.
- All settings were alphabetized.

**Before**

**After**

The image shows a side-by-side comparison of the 'HR Data Management' settings menu in the 'Before' and 'After' states. The 'Before' state shows a menu with various settings, including 'Recommendation Engine' and 'Employee Scheduling'. The 'After' state shows the same menu, but with the settings reorganized and renamed. The 'Recommendation Engine' and 'Employee Scheduling' settings are now grouped under a new 'Scheduling' category. The 'Rules' setting is now 'Recommendation Rules', and the 'Engines' setting is now 'Recommendation Assistant'. The menu is also sorted alphabetically.

# Global Settings

## Human Resources

- *Human Resources* was renamed **HR Data Management**.
- *Visa Type* is now **Visa Types**.
- *Job Title* is now **Job Titles**.
- All settings were alphabetized.

The image shows a side-by-side comparison of the 'Global Settings' interface in the 'Time Off' section of the 'workeasy' software. The 'Before' view on the left shows a menu with 'Human Resources' highlighted in a purple box. Below it, a list of settings is shown in a dotted purple box, including 'Work Hours Definition', 'Profile Designer', 'Compliances', 'Termination Reason', 'Visa Type', 'Job Title', 'Asset Category', 'Pay Schedule', 'Degree Title', and 'Compensation Reason'. The 'After' view on the right shows the same menu with 'HR Data Management' highlighted in a purple box. Below it, the same list of settings is shown in a dotted purple box, but now alphabetized: 'Asset Category', 'Compensation Reason', 'Compliances', 'Degree Titles', 'Job Titles', 'Pay Schedule', 'Profile Designer', 'Termination Reason', 'Visa Types', and 'Work Hours Definition'. A purple arrow points from the 'Human Resources' box in the 'Before' view to the 'HR Data Management' box in the 'After' view. The 'Time Off' section header is visible at the top of both views, and the 'workeasy' logo is in the top right of the 'After' view.

# Global Settings

## Time Off

- *Blackout Set* is now **Blackout Day Sets**.
- All settings were alphabetized.

The image shows a side-by-side comparison of the 'Time Off' settings menu in the 'Before' and 'After' states. The 'Before' state shows a menu with settings listed in a non-alphabetical order: Advanced Settings, General Settings, Groups, Management Levels, Custom Fields, Workflows, Geofence, Tags, Questionnaire, Recommendation Engine, Human Resources, Time Off, Time Off Types, Blackout Set, Holidays, FMLA Reasons, Employee Scheduling, and Job Costing. The 'After' state shows the same menu with settings alphabetized: General Settings, Platform Settings, HR Data Management, Time Tracking, Job Costing, Devices, Time Off, Blackout Day Sets, FMLA Reasons, Holidays, Time Off Types, Scheduling, and Surveys & Questionn... A purple dashed arrow points from the 'Time Off' menu item in the 'Before' state to the expanded 'Time Off' menu in the 'After' state, highlighting the changes in the sub-menu items.

**Before**

**After**

Time Off

Settings

Advanced Settings

General Settings

Groups

Management Levels

Custom Fields

Workflows

Geofence

Tags

Questionnaire

Recommendation Engine

Human Resources

Time Off

Time Off Types

Blackout Set

Holidays

FMLA Reasons

Employee Scheduling

Job Costing

Settings

Search option(s)

General Settings

Platform Settings

HR Data Management

Time Tracking

Job Costing

Devices

Time Off

Blackout Day Sets

FMLA Reasons

Holidays

Time Off Types

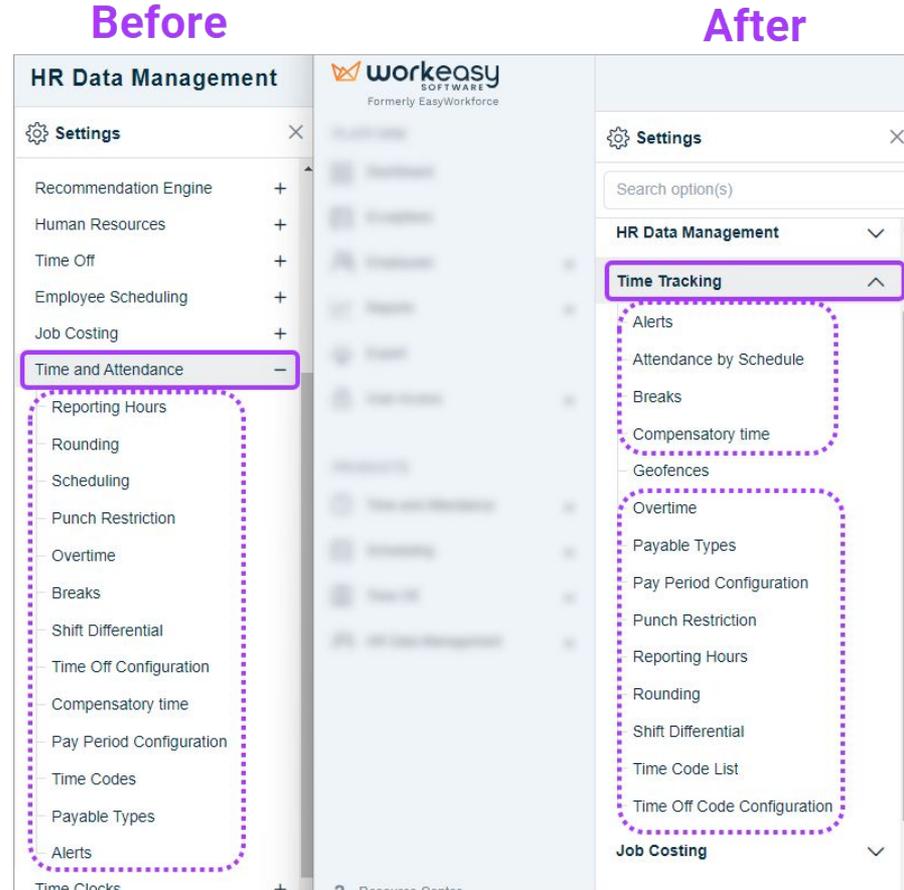
Scheduling

Surveys & Questionn...

# Global Settings

## Time and Attendance

- This setting was renamed **Time Tracking** and incorporates all prior *Time and Attendance* categories plus *Geofences*.
- *Scheduling* was renamed **Attendance by Schedule**.
- *Time Codes* was renamed **Time Code List**.
- *Time Off Configuration* was renamed **Time Off Code Configuration**.
- All settings were alphabetized.



# Global Settings

## Time Clocks, Kiosks, GroupClock

A new section called **Devices** now combines these three settings.

**Before**

HR Data Management

- Settings
- Advanced Settings
- General Settings
- Groups
- Management Levels
- Custom Fields
- Workflows
- Geofence
- Tags
- Questionnaire
- Recommendation Engine
- Human Resources
- Time Off
- Employee Scheduling
- Job Costing
- Time and Attendance
- Time Clocks
- Kiosks
- GroupClock

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PLATFORM

- Dashboard
- Exceptions
- Employees
- Reports
- Export
- User Access

PRODUCTS

- Time and Attendance
- Scheduling
- Time Off
- HR Data Management

**After**

Settings

Search option(s)

- General Settings
- Platform Settings
- HR Data Management
- Time Tracking
- Job Costing
- Devices
- Time Off
- Scheduling
- Surveys & Questionnaires
- Integrations
- Data Import & Export

GroupClock Settings

Kiosk Permissions

Kiosk Settings

Selfie Enrollment

Time Clock Permissions

Time Clock Settings

Time Clock Settings

Clocking Permissions

Selfie Enrollment

Kiosk Settings

Kiosk Permissions

GroupClock Settings

# Global Settings

## Export, Scheduled Reports

- These settings were combined and moved to **Data Import & Export**.
- [Slide 4](#) addresses the *Import* settings.

The image displays a side-by-side comparison of the 'Settings' menu in the Workeasy HR Data Management software, labeled 'Before' and 'After'.

**Before State:** The 'Settings' menu includes the following items: Advanced Settings, General Settings, Groups, Management Levels, Custom Fields, Workflows, Geofence, Tags, Questionnaire, Recommendation Engine, Human Resources, Time Off, Employee Scheduling, Job Costing, Time and Attendance, Time Clocks, Kiosks, GroupClock, and Export. The 'Export' item is highlighted with a purple box.

**After State:** The 'Settings' menu is reorganized. A new item, 'Data Import & Export', is highlighted with a purple box and expanded to show: Delivery Methods, Export History, Import Employees, Import Job Costings, Import Punches, Import Time Off Balance, Report History, and Scheduled Exports. The 'Export' item is no longer present in the main menu.

Dotted purple arrows indicate the mapping of settings from the 'Before' state to the 'After' state:

- 'Export' (Before) maps to 'Export History' (After).
- 'Scheduled Reports' (Before) maps to 'Report History' (After).
- 'Scheduled Exports' (Before) maps to 'Scheduled Exports' (After).

# Global Settings

## Integrations

These settings were updated and alphabetized.

The 'Before' screenshot shows the 'HR Data Management' settings page. The 'Settings' menu is open, listing various options. The 'Integrations' option is highlighted with a purple box. Below it, a list of integration options is shown, enclosed in a purple dashed box. The list is not alphabetized and includes: Run Powered by ADP, API Access, ADP Workforce Now, QuickPay, QuickPay Logs, QuickBooks Online, BambooHR, Clair On-Demand Pay, and Webhooks.

Setting	Icon
Settings	⚙️
Recommendation Engine	+
Human Resources	+
Time Off	+
Employee Scheduling	+
Job Costing	+
Time and Attendance	+
Time Clocks	+
Kiosks	+
GroupClock	+
Export	+
Scheduled Reports	+
Integrations	-

- Run Powered by ADP
- API Access
- ADP Workforce Now
- QuickPay
- QuickPay Logs
- QuickBooks Online
- BambooHR
- Clair On-Demand Pay
- Webhooks

The 'After' screenshot shows the 'Settings' page with the menu items alphabetized. The 'Integrations' option is highlighted with a purple box. Below it, a list of integration options is shown, enclosed in a purple dashed box. The list is now alphabetized and includes: ADP Run, ADP Workforce Now, API Access, BambooHR, Quickbooks Online, QuickPay, QuickPay Logs, and Webhooks.

Setting	Icon
Settings	⚙️
Platform Settings	▾
HR Data Management	▾
Time Tracking	▾
Job Costing	▾
Devices	▾
Time Off	▾
Scheduling	▾
Surveys & Questionna...	▾
Integrations	▴

- ADP Run
- ADP Workforce Now
- API Access
- BambooHR
- Quickbooks Online
- QuickPay
- QuickPay Logs
- Webhooks