Quick Start Guide
Employee Portal Configuration

This Quick Start Guide outlines the steps you must take before upgrading your first client to the new Employee Portal (EP). This document guides you through setting up a theme and updating the default template that includes menus, dashboard, documents, and other features.

Who Should Read This Quick Start?

As a service provider, you have probably already customized the employee experience in ESS. Individuals responsible for the administration and support of the current ESS are advised to read and follow this Quick Start Guide to ensure a seamless and greatly improved experience for your clients' employees. It is also recommended that you view the series of Employee Portal Configuration training videos available in the Quick Start Kit.

Before You Begin

PrismHR recommends that you set up a default theme and template in the EP Configuration Tool, and then transition to the new Employee Portal on a client-by-client basis. To get started, follow the steps below:

- In PrismHR, add Employee Portal Configuration to the user role.
- In the Employee Portal Configuration Tool, create a new default theme.
- In the Employee Portal Configuration Tool, update the default template.
- In PrismHR Client Details, select the *Enable the New Employee Portal* option.

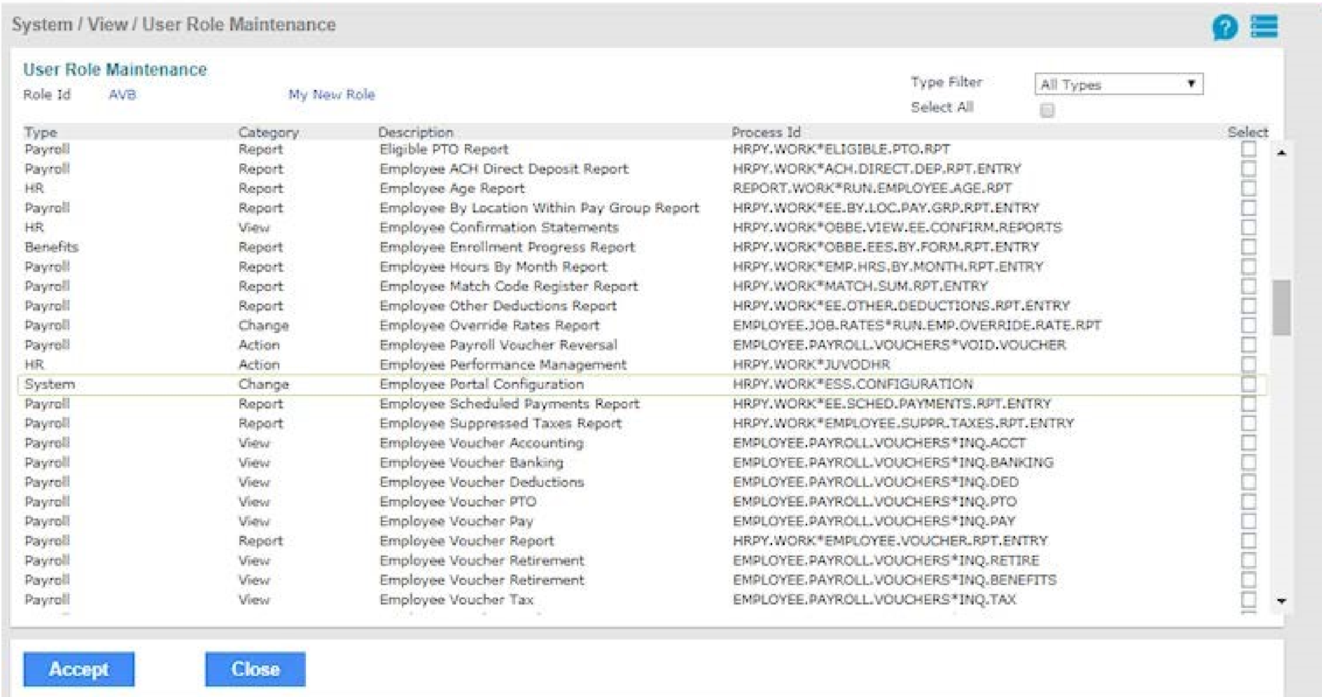
Each of these steps is outlined in the following sections.

Add EP Configuration Access

To be able to use the EP Configuration Tool, the administrator must add user role access to the Employee Portal Configuration Tool in PrismHR. Only users with user role access to Employee Portal Configuration (HRPY.WORK*ESS.CONFIGURATION) will be able to view and use the EP Configuration Tool.

To add user role access:

1. In PrismHR, open the User Roles form (found in the **Back Office** menu under **System|Change**).
2. Click *Role ID* and then double-click the user role to open it.
3. Click **Add**. The User Role Maintenance form opens.
4. Select **Employee Portal Configuration**, which is associated with the **HRPY.WORK*ESS.CONFIGURATION** Process ID.



Type	Category	Description	Process Id	Select
Payroll	Report	Eligible PTO Report	HRPY.WORK*ELIGIBLE.PTO.RPT	
Payroll	Report	Employee ACH Direct Deposit Report	HRPY.WORK*ACH.DIRECT.DEP.RPT.ENTRY	
HR	Report	Employee Age Report	REPORT.WORK*RUN.EMPLOYEE.AGE.RPT	
Payroll	Report	Employee By Location Within Pay Group Report	HRPY.WORK*EE.BY.LOC.PAY.GRP.RPT.ENTRY	
HR	View	Employee Confirmation Statements	HRPY.WORK*OBBE.VIEW.EE.CONFIRM.REPORTS	
Benefits	Report	Employee Enrollment Progress Report	HRPY.WORK*OBBE.EES.BY.FORM.RPT.ENTRY	
Payroll	Report	Employee Hours By Month Report	HRPY.WORK*EMP.HRS.BY.MONTH.RPT.ENTRY	
Payroll	Report	Employee Match Code Register Report	HRPY.WORK*MATCH.SUM.RPT.ENTRY	
Payroll	Report	Employee Other Deductions Report	HRPY.WORK*EE.OTHER.DEDUCTIONS.RPT.ENTRY	
Payroll	Change	Employee Override Rates Report	EMPLOYEE.JOB.RATES*RUN.EMP.OVERRIDE.RATE.RPT	
Payroll	Action	Employee Payroll Voucher Reversal	EMPLOYEE.PAYROLL.VOUCHERS*VOID.VOUCHER	
HR	Action	Employee Performance Management	HRPY.WORK*JUVODHR	
System	Change	Employee Portal Configuration	HRPY.WORK*ESS.CONFIGURATION	
Payroll	Report	Employee Scheduled Payments Report	HRPY.WORK*EE.SCHED.PAYMENTS.RPT.ENTRY	
Payroll	Report	Employee Suppressed Taxes Report	HRPY.WORK*EMPLOYEE.SUPPR.TAXES.RPT.ENTRY	
Payroll	View	Employee Voucher Accounting	EMPLOYEE.PAYROLL.VOUCHERS*INQ.ACCT	
Payroll	View	Employee Voucher Banking	EMPLOYEE.PAYROLL.VOUCHERS*INQ.BANKING	
Payroll	View	Employee Voucher Deductions	EMPLOYEE.PAYROLL.VOUCHERS*INQ.DED	
Payroll	View	Employee Voucher PTO	EMPLOYEE.PAYROLL.VOUCHERS*INQ.PTO	
Payroll	View	Employee Voucher Pay	EMPLOYEE.PAYROLL.VOUCHERS*INQ.PAY	
Payroll	Report	Employee Voucher Report	HRPY.WORK*EMPLOYEE.VOUCHER.RPT.ENTRY	
Payroll	View	Employee Voucher Retirement	EMPLOYEE.PAYROLL.VOUCHERS*INQ.RETIRE	
Payroll	View	Employee Voucher Retirement	EMPLOYEE.PAYROLL.VOUCHERS*INQ.BENEFITS	
Payroll	View	Employee Voucher Tax	EMPLOYEE.PAYROLL.VOUCHERS*INQ.TAX	

5. Click **Accept**.
6. Click **Save**.

All users with user role access to Employee Portal Configuration can now use the EP Configuration Tool. To launch the EP Configuration Tool, just click Employee Portal Configuration (found in the **Back Office** menu under **System|Change**).

Create a New Default Theme

Think of your theme as a sort of color palette; it controls the color of fonts, the menu, and dashboard elements throughout the Employee Portal. While the Employee Portal already includes a read-only default theme (with a muted blue color palette), it is recommended that you create a new default theme that reflects your brand. When you assign the new default theme to the default template, you customize your clients' experience and showcase your brand.

For more in-depth information on working with themes, you can click to open online help. You can also view the *Working with Themes* video, which is part of the Employee Portal Configuration Tool training series in the Quick Start Kit.

To create a new theme:

1. To launch the EP Configuration Tool, click Employee Portal Configuration (found in the **Back Office** menu under **System|Change**).
2. Navigate to Themes and click **Create New Theme**.

3. In the *Name* field, enter a theme name that you can easily identify as your default theme (for example, *MetroHR Theme*).
4. Edit the colors to match your brand.
5. Click **Save**.

You can now open the default template, click the *Appearance* tab, and apply this theme to the default template as discussed below.

Update the Default Template

For all your clients, the look and feel of the Employee Portal will initially come from the configuration of the default template. Before you implement the Employee Portal on a client-by-client basis, plan to update the default template. Eventually, you will create many custom templates and apply them to your clients, but it's a good strategy to start small with one client and the default template.

For more in-depth information on working with templates, you can click to open online help. You can also view the *Working with Templates* video, which is part of the Employee Portal Configuration Tool training series in the [Quick Start Kit].

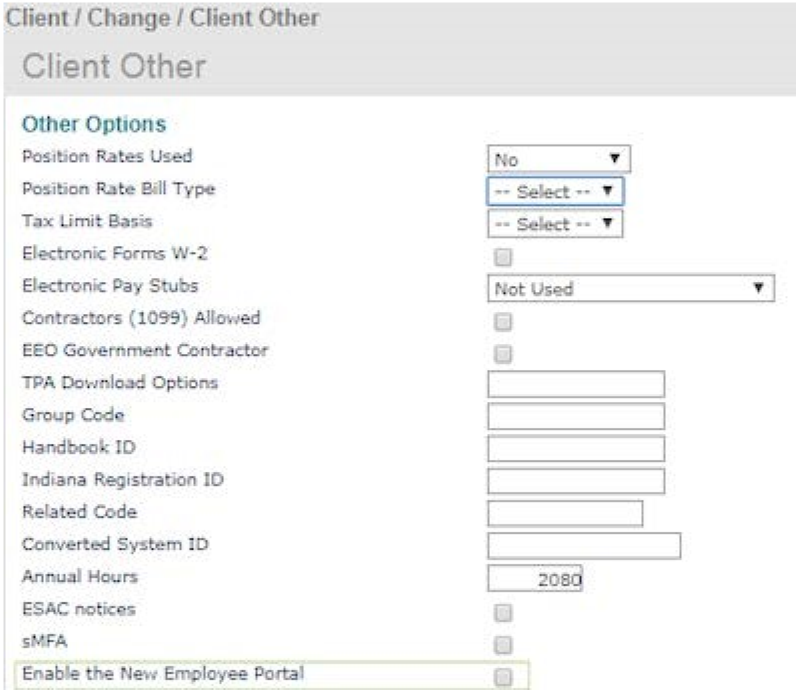
1. To launch the EP Configuration Tool, click Employee Portal Configuration (found in the **Back Office** menu under **System|Change**).
2. Navigate to **Configuration > Templates**.
3. On the default template, click the template name or the icon. The template opens with the tabs to configure Employee Portal default settings.
4. On each tab, configure the *General* settings, *Menu* structure, *Dashboard* widgets, and *Appearance* (including *Dashboard* logo). On the *Documents* tab, you can link to public documents, but not all clients use this.
5. Click **Save**.

Once you save the template, all clients without a custom template assigned (which will be all clients at first) will pick up this configuration.

Enable the New Employee Portal for a Specific Client

Now that you've configured the Employee Portal, you're ready for the final step—enabling it for your first client.

1. In PrismHR, open Client Details and click the *Other* tab.
2. On the *Other* tab, select the **Enable the New Employee Portal** option.



3. Click **Save**.

Ready, Set, Go

Once you complete these steps, your first client is ready to experience the new Employee Portal. Their employees can now use the Employee Portal from desktops, tablets, and smartphones with the same employee URL that they've had all along.

Keep in mind that PrismHR has created tools to facilitate your transition to the new Employee Portal. In addition to this Quick Start, you can click at any time to open online help for the EP Configuration Tool. And you can watch the Employee Portal Configuration training videos in the Quick Start Kit.