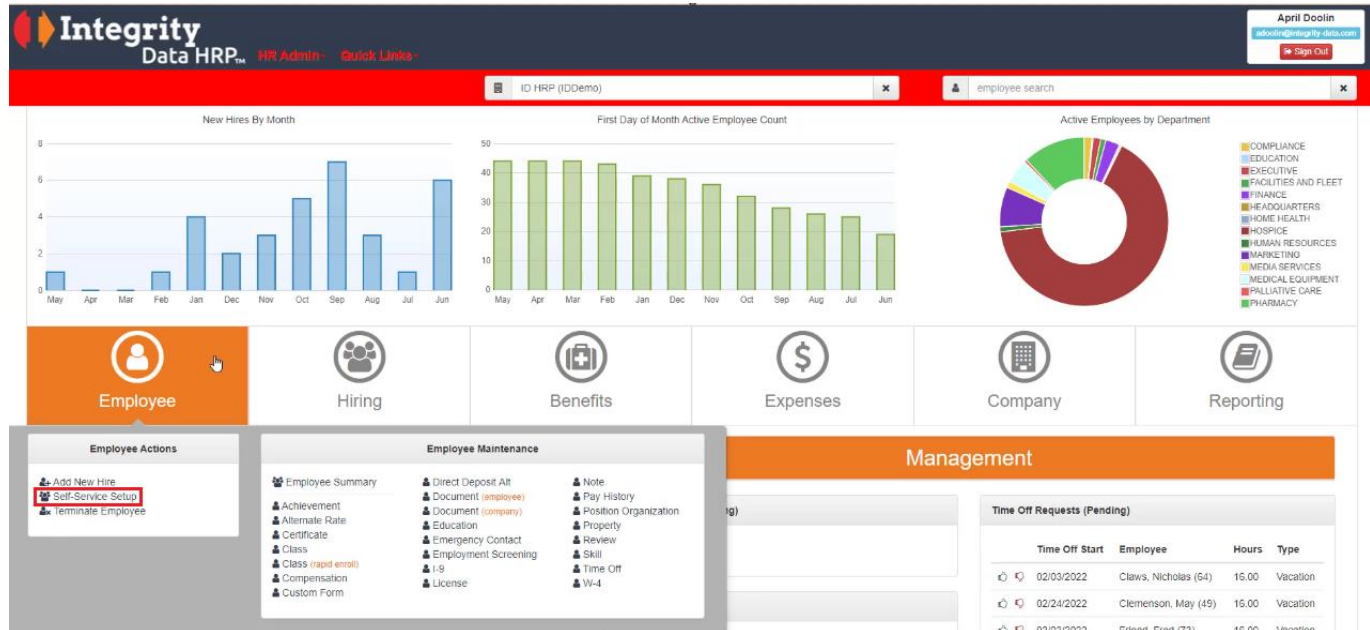


TITLE: Setting Up Employee Self-Service

SUMMARY: Setting up employee self-service to access the “My HR” menu

INSTRUCTIONS:

From the HR Admin Dashboard > Employee > Self Service Set Up



- Setup default settings for new self-service users
- TFA - Two Factor Authentication Active
- Send Welcome Email
 - An auto generated email that will contain information about logging in to the system including changing their password
 - This section will only send out a welcome email to the employees that are being set up with the self service
 - If you have an employee that never logged into the system and will need the initial welcome email sent out to them again or need a link to reset their password
 - Navigate back to the HR Dashboard > Company > User List
 - Select the email icon to resend the welcome email
 - Select the arrow icon to send the reset password



- Time Zone
 - All the employees in the group will be set to one time zone, if you have employees that are on different time zones, you will want to remove them from the set up and send them their delete them and then re-open the self-service setup menu and send out the other employee(s) that are on a different time zone separately

Self-Service Setup

Self-Service Setup

Company/Employees
 Choose a company, assign default settings, and confirm list of employees to be setup for Self-Service. The default list of employees includes all currently ACTIVE employees who do NOT currently have Self-Service setup for them. If the employee does NOT currently have an email address on record, they also will not appear in this list. If there are employees initially listed on the EXCLUDED list, these employees have something invalid about them such as duplicate email addresses. Once the process is started, it will also verify any duplicate emails as this is used for the USERNAME in the system.

Company
ID HRP (IDDemo)

Default settings for new Self-Service users

TFA Active No Yes	Timezone Central (US and Canada) (UTC-06:00)
Send Welcome Email No Yes	Assign a Role Please Choose (represents BLANK) *

- Any employees that are located within a different time zone, or will receive a different welcome letter
- Assign a Role
 - Base Anonymous (Level=0)
 - This level is used for applicants login to the Applicant Tracking System
 - Base User (Level=10)
 - Assign this level for anyone who was not assigned a role
 - You will be able to update the security level after the employee self-service setup is complete by navigating to: **HR Admin Dashboard > Security > Maintenance > Assign Users to Roles**
 - Base Manager (Level=25)
 - Slim Base Manager (Level=25)
 - Base Admin (Level=50)

Assign a Role

Please Choose (represents BLANK) * ▼

Please Choose (represents BLANK)

IDDemo - BaseAnonymous (Level=0)

IDDemo - BaseUser (Level=10)

IDDemo - BaseManager (Level=25)

IDDemo - Slim BaseManager (Level=25)

IDDemo - BaseAdmin (Level=50)

- Employees will show in the bottom left green section that need to be set up with Self-Service
- Any employees that you delete from the set up group, will appear in the bottom pink section to the right

Employees to be setup with Self-Service	
Employee	Email
Lance, Shannon (51)	slance@ldhrptest.com
Clemenson, Todd (53)	tclemenson@ldhrptest.com

Employees EXCLUDED from Self-Service setup	
Employee	Email

- Once you have verified the employees that you want to set up for self-service select the self-service button below



- Your employees will receive a success notification once the process is complete.

