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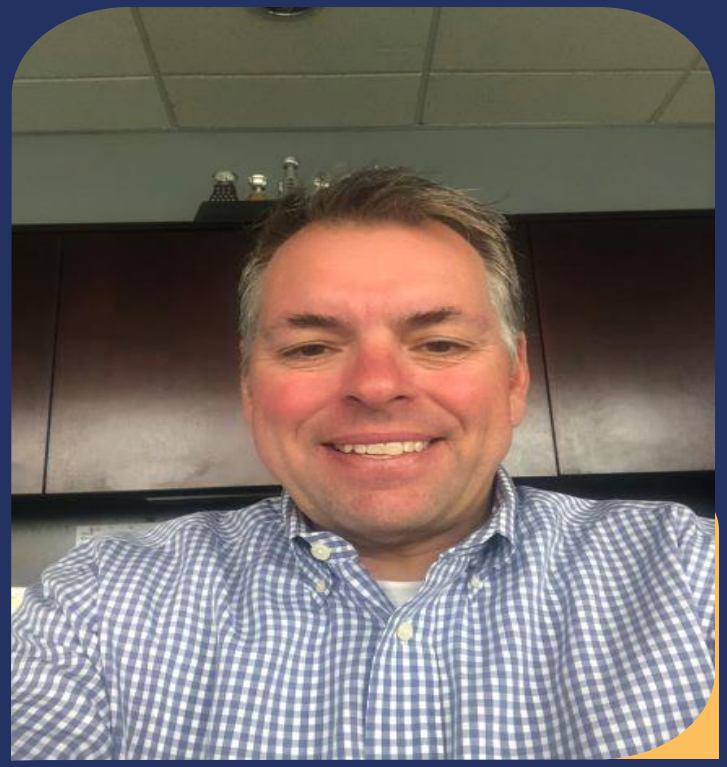
An HCM Growth Summit

How To Rollout Asure ID & New Employee Self Service

Presented by Paul Trahan

Asure

Speaker Introduction



Paul Trahan

VP, Reseller Support

Session Agenda

01 Asure ESS Portal & Asure Mobile

02 Activation & Rollout

03 Asure Identity Management

04 Identify, Update & Manage Missing or Invalid Data

05 Resources

Q&A

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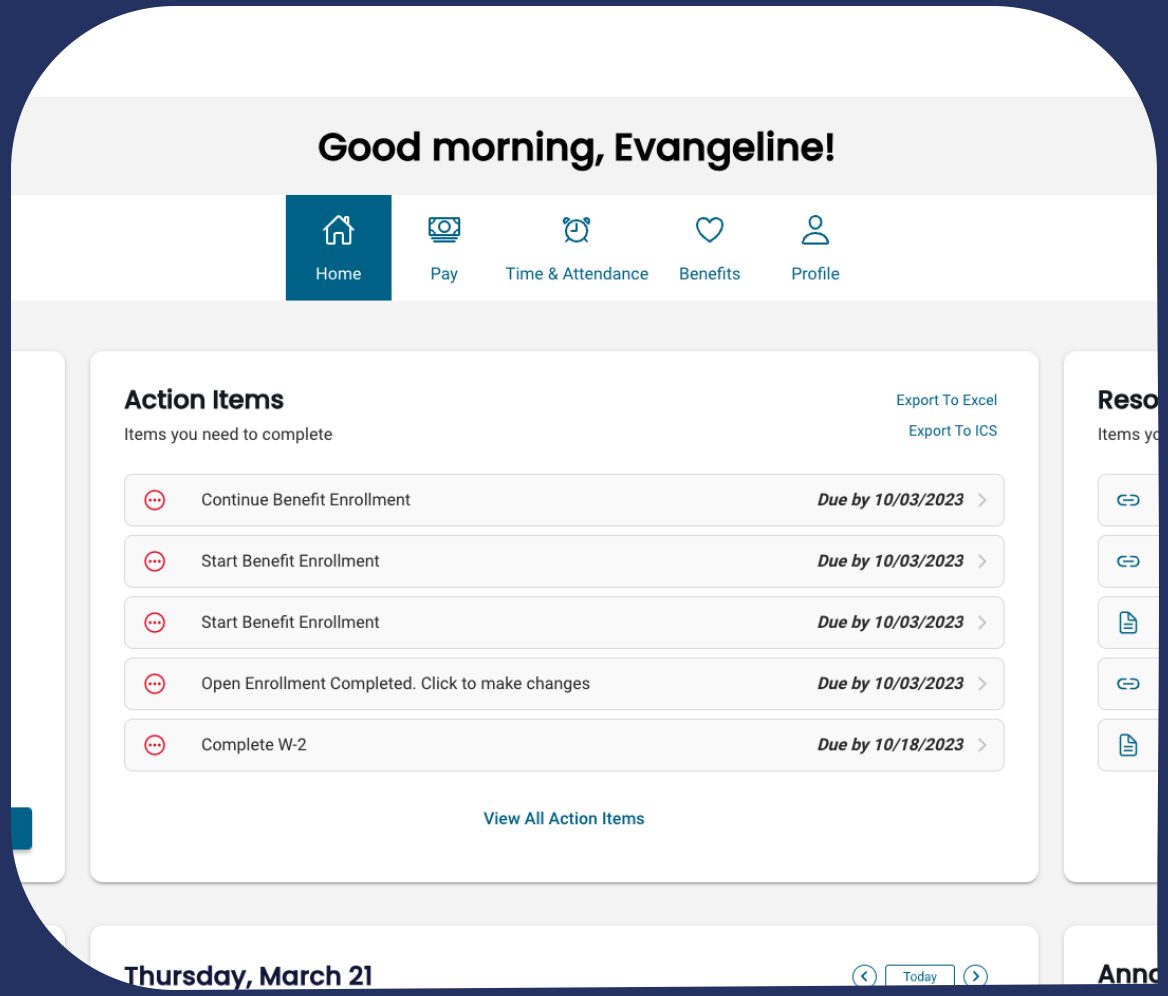
Asure ESS Portal & Asure Mobile

Asure ESS Portal



- Resources
- Announcements
- Demographic EE Info
- Direct Deposit
- 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
- EE Info Requests & Approvals
- Direct Deposit Request & Approval
- Admin Portal Registration Mgmt
- Bureau Readiness Reporting
- Asure Mobile App – Apple & Android

Asure Mobile

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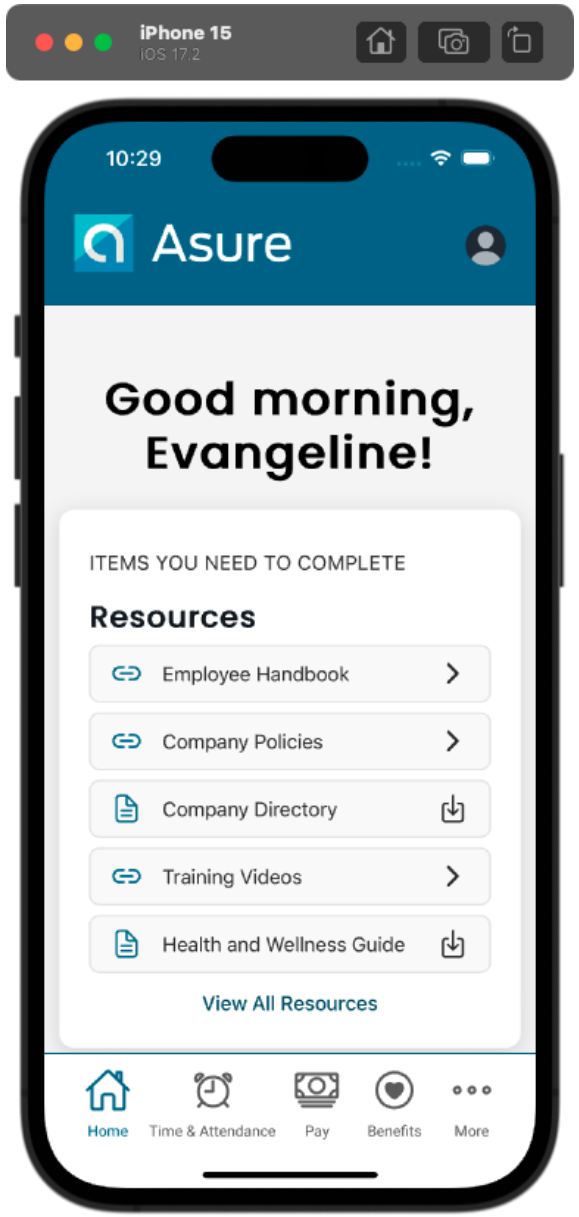
Download on the App Store



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Activation & Rollout

Asure Rollout & “Knock outs”

1

Exclude your Essential – Asure HR Clients. Full Features are not currently available.

2

Clients that have less than 80% Data Complete. Missing or invalid data management.

ASURE ESS

Are You Ready?

Assess Your Customer Base

- Who is Using ESS & Level of Usage
- Multiclient Reports

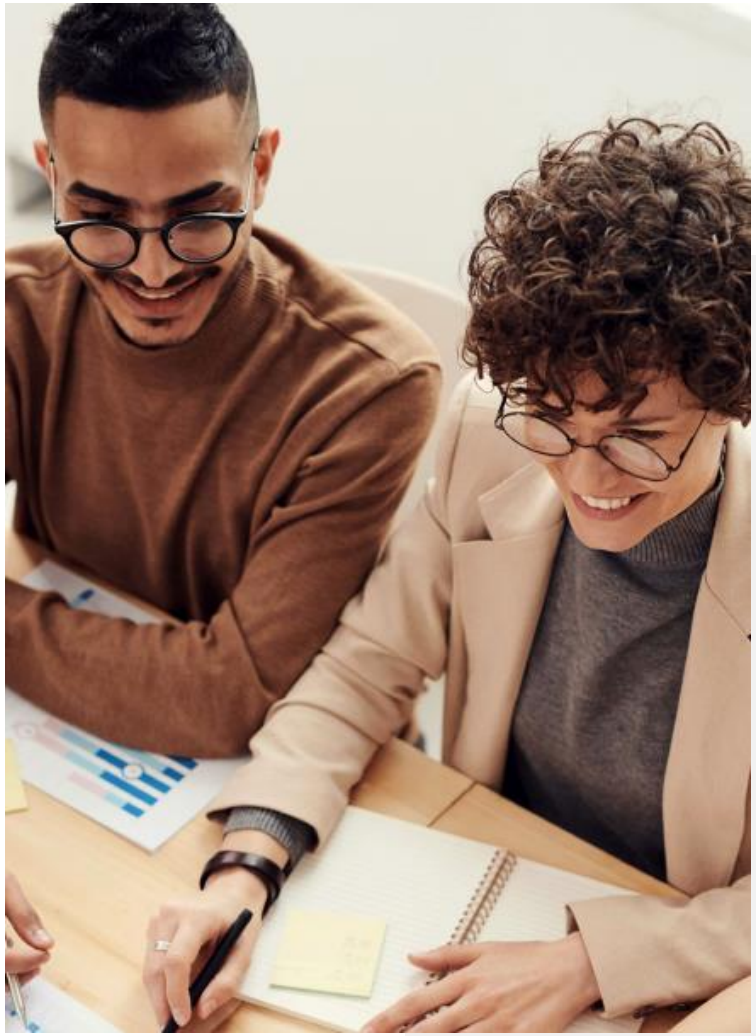
Collect Missing Employee Data & Validate

- Company Level Report
- Virtual Mail Room

Update employee information

- EvoExchange
- EvoExchange Scheduler

Track your progress



New to Evolution Exchange?

If you and your staff need a refresher or guidance using Evolution Exchange , please reach out to the Asure Support team. We are here to help!

We are ready to begin…Let's get Started.

01 Request Asure ID & Complete Request Form

- "Asure ID Request" in subject line.
- Up to 3 Asure ID admin users
- Logo
- Registration email address
- Authorization to alter terminated EE email addresses
- Asure Identity url: portal.identity.asurehcm.com
- New ESS url: "Yoursubdomain.portal.asurehcm.com

02 Prepare & Establish Demo Environment

- Enable the Group Security rights Admin Portal Registration
- Set up Scheduled Identity Sync Task
- Enable New Asure Portal for Demo
- Review registration emails
- Staff registration & Mobile App
- Review registration status
- Review logo & brand

03 Managing the Launch for Active Clients

- Assess required data & current usage of ESS Report S5351
- Address missing data
  Reports S5345, S5346 & S5347
- % of Readiness
- Activation – One by One or Bulk

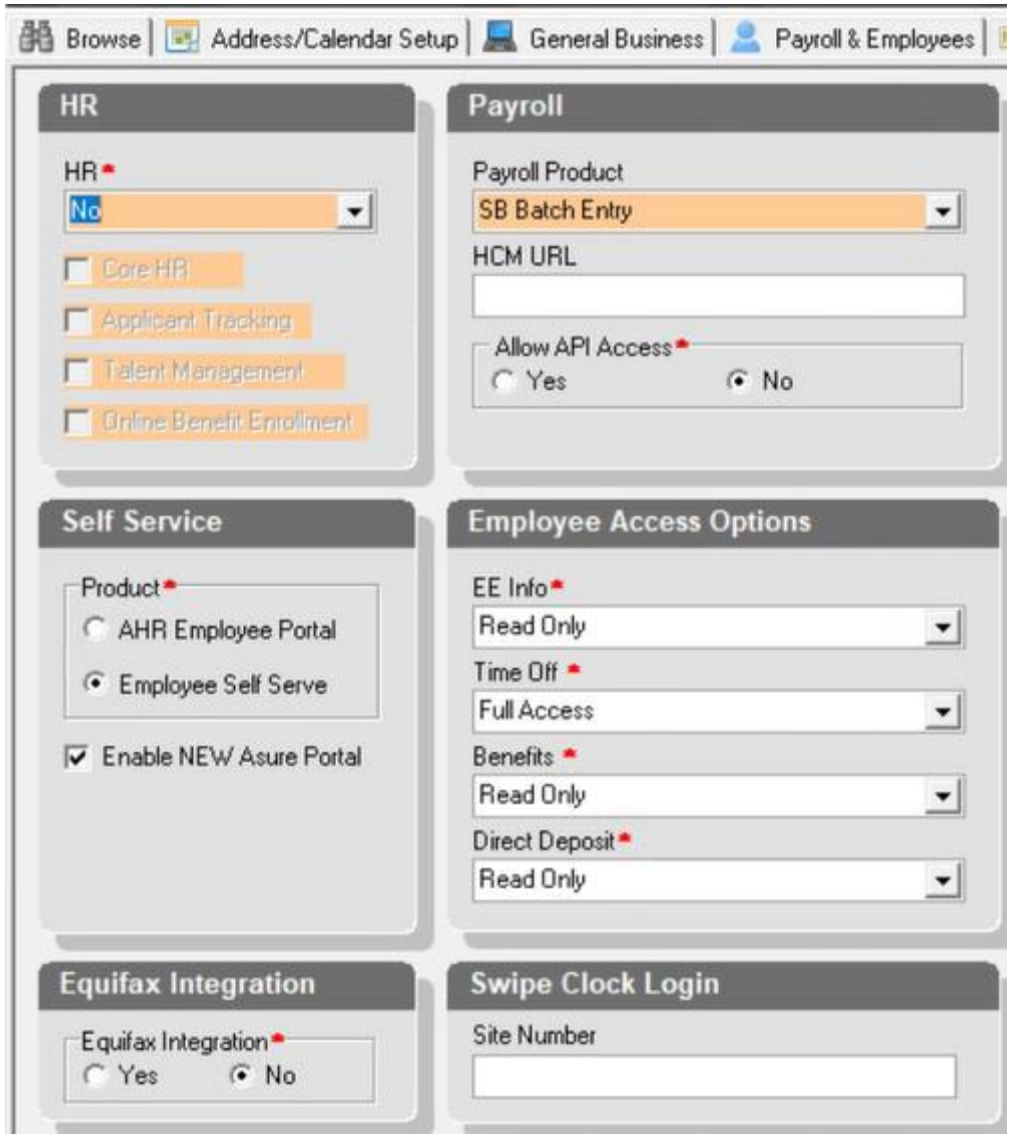
04 Best Practices

- Managing email to preserve delivery.
- Terminated Employees & Excluding Employees from Registration use not_provided@EE.com
- Managing % of Readiness – use not_collected@ee.com for employees that have not provided email address
- No DOB - use DOB 1/1/1900 as default.

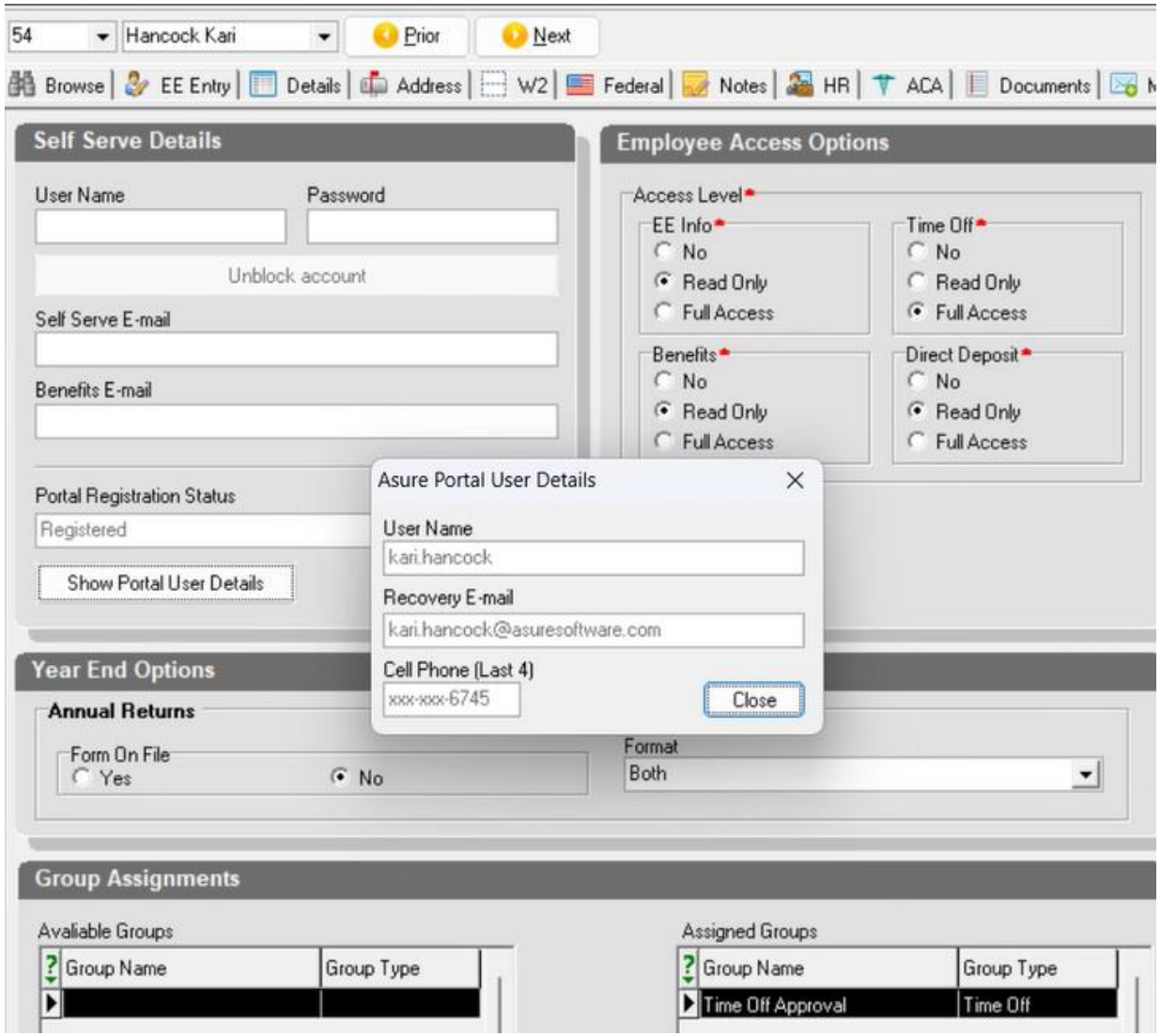
05 Track your progress & Goals

- Reviewing client status & % of Readiness
- Communications to Clients
- CSR Role
- Capture & respond to feedback

New Company – General - Company Info - Payroll Products Tab



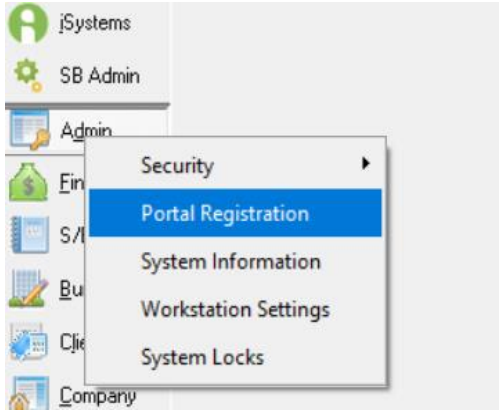
New Employee – Employee – Self Serve Tab

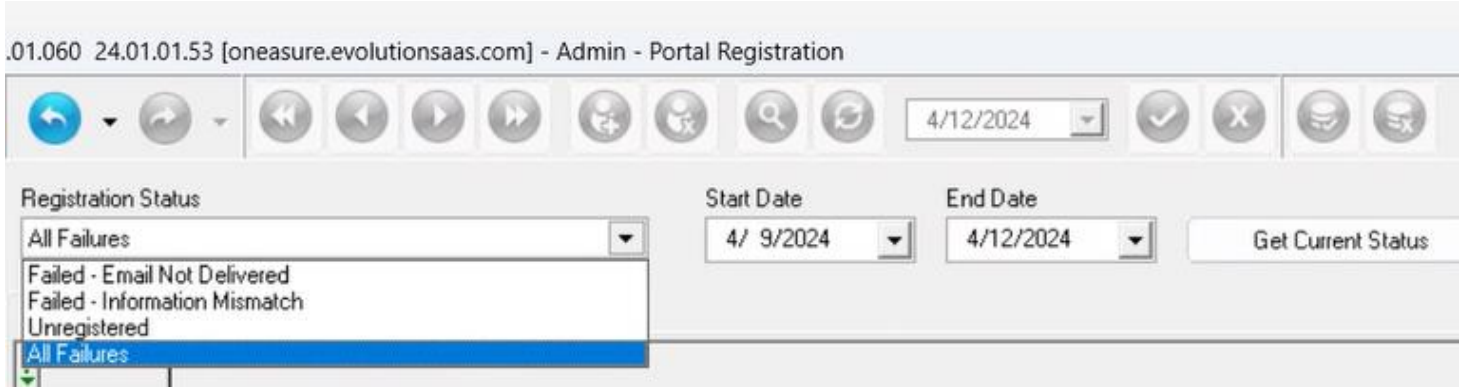


New Section

Admin – Portal Registration

Portal Registration allows you to view employees that have not registered or that received an error when they tried to register.





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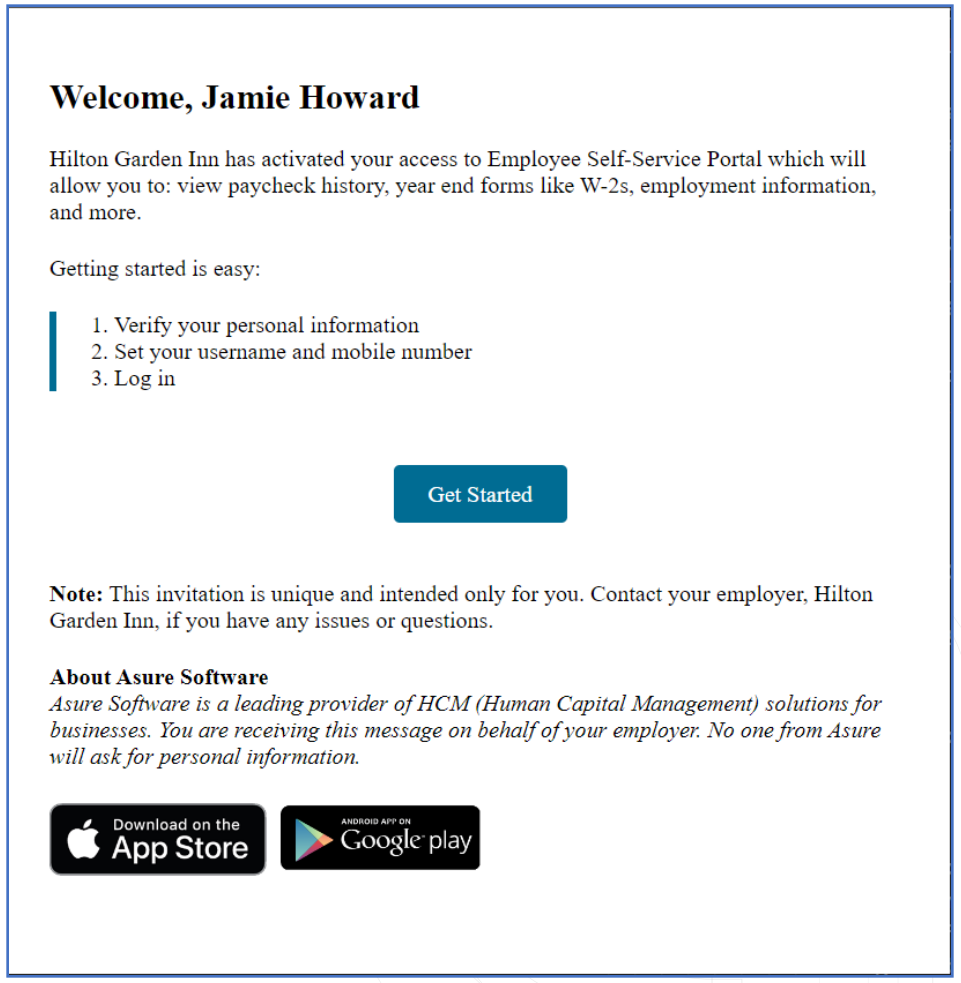
Asure Identity Management

Registration

- **Registration Email From:** Provided by Partner - Tested
- **Terminated Employee Email Changed To:** Not_Provided@ee.com
- **No Employee Email Address:** Not_Collected@ee.com
- **Default DOB:** 1/1/1900
- **Registration Email Message:**

- **Asure ID URL:** Portal.Identity.Asurehcm.com
- **Asure Portal URL:** YourSubDomain.portal.asurehcm.com



Welcome, Jamie Howard

Hilton Garden Inn has activated your access to Employee Self-Service Portal which will allow you to: view paycheck history, year end forms like W-2s, employment information, and more.

Getting started is easy:

1. Verify your personal information
2. Set your username and mobile number
3. Log in

Get Started

Note: This invitation is unique and intended only for you. Contact your employer, Hilton Garden Inn, if you have any issues or questions.

About Asure Software

Asure Software is a leading provider of HCM (Human Capital Management) solutions for businesses. You are receiving this message on behalf of your employer. No one from Asure will ask for personal information.

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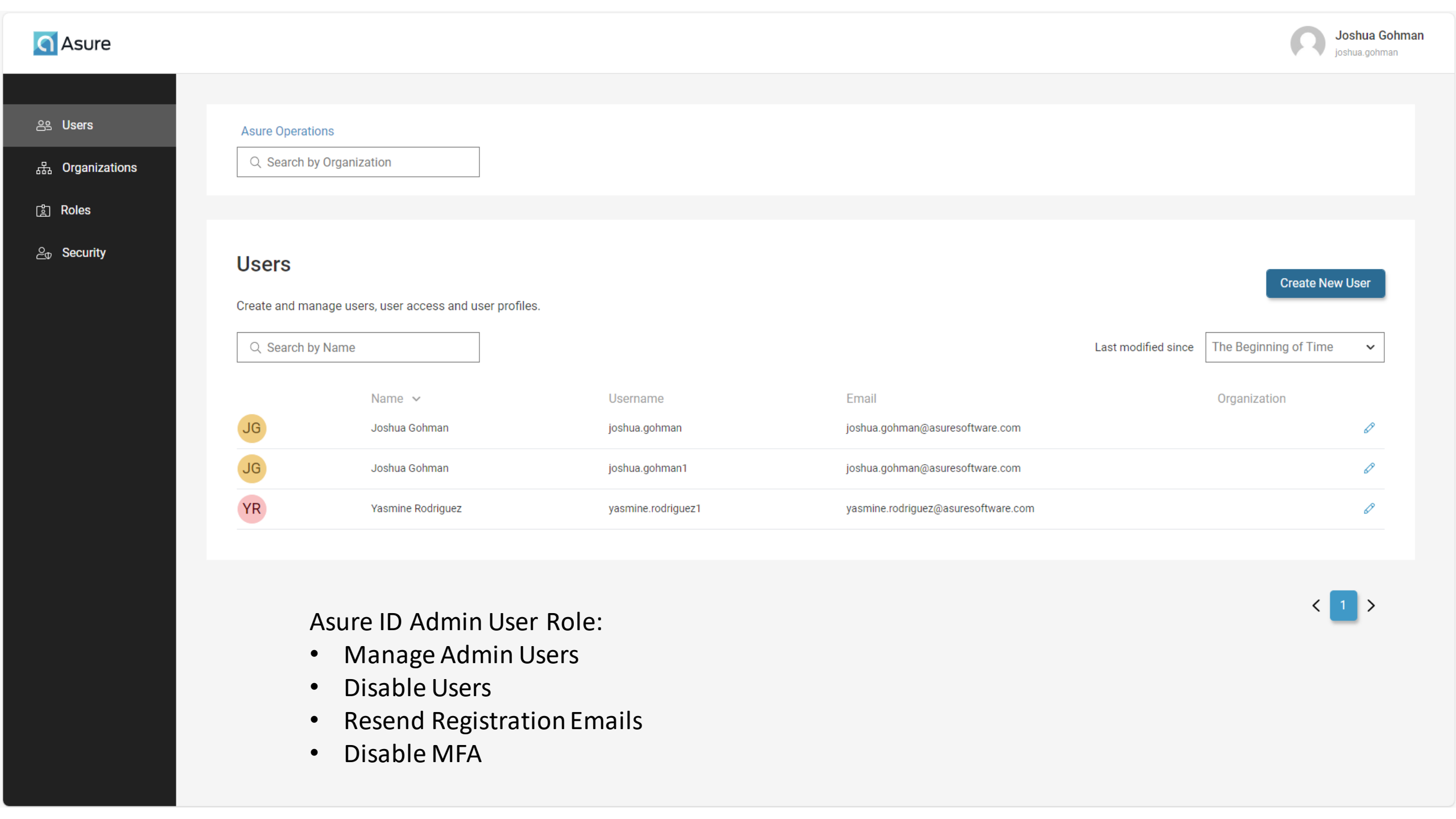
ANDROID APP ON Google play



Asure ID Admin User Role:

- Manage Admin Users
- Disable Users
- Resend Registration Emails
- Disable MFA

Asure

Joshua Gohman
joshua.gohman

- Users
- Organizations
- Roles
- Security

Asure Operations > OneAsure-CTA > Summit Digital Networks LLC > Summit Digital Networks LLC

Search by Organization

Users

Create and manage users, user access and user profiles.

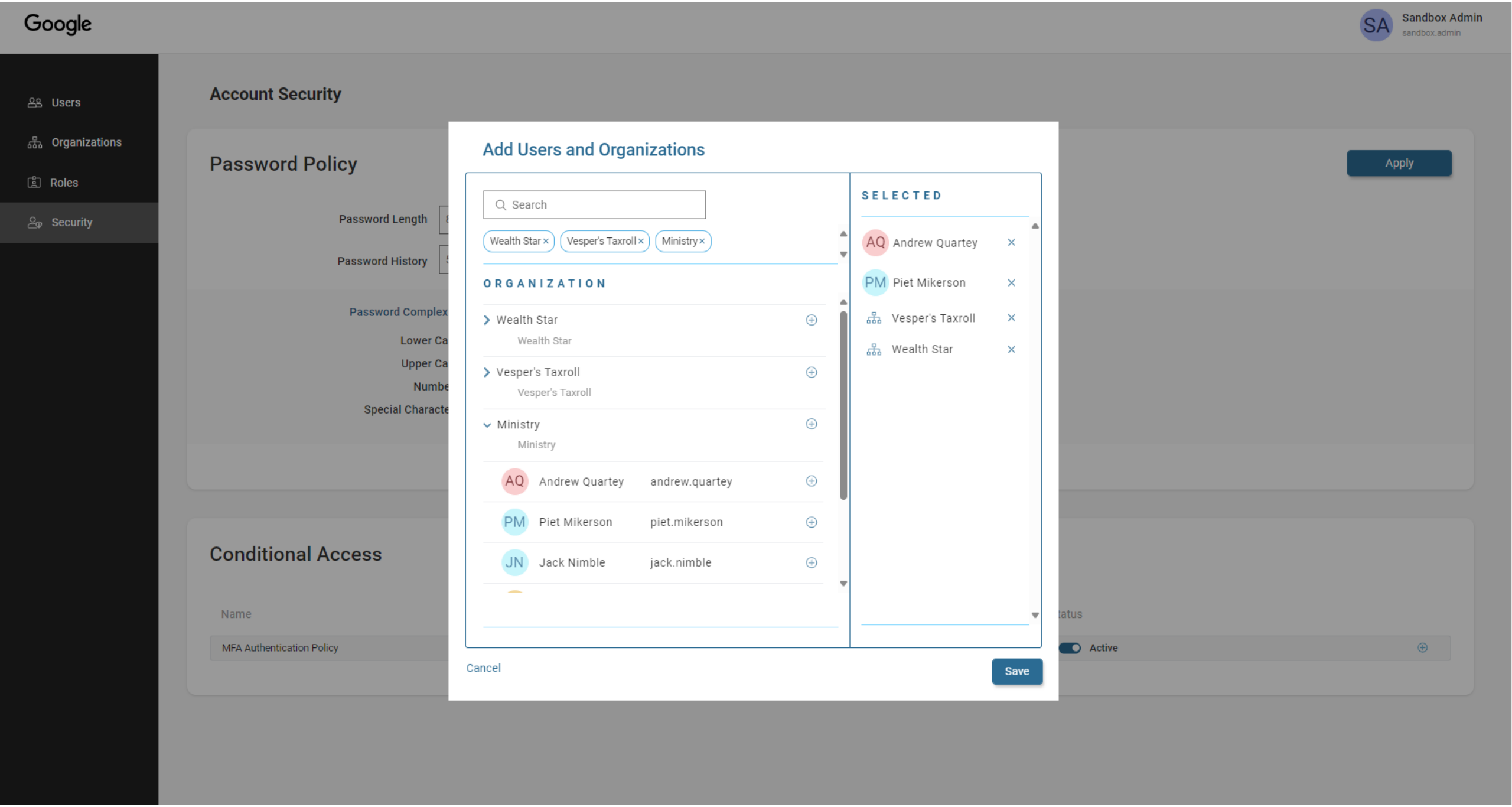
Create New User

Search by Name

Last modified since: The Beginning of Time

	Name	Username	Email	Organization
EB	Eric Bram	eric.bram	ebram@summitnetworking.net	

1


Google
SA
Sandbox Admin
sandbox.admin
Users
Organizations
Roles
Security
Account Security
Password Policy
Apply
Password Length
Password History
Password Complex
Lower Ca
Upper Ca
Numbe
Special Characte
Conditional Access
Name
MFA Authentication Policy
Active
Add Users and Organizations
Search
Wealth Star ×
Vesper's Taxroll ×
Ministry ×
ORGANIZATION
Wealth Star
Wealth Star
Vesper's Taxroll
Vesper's Taxroll
Ministry
Ministry
AQ Andrew Quartey andrew.quartey
PM Piet Mikerson piet.mikerson
JN Jack Nimble jack.nimble
SELECTED
AQ Andrew Quartey
PM Piet Mikerson
Vesper's Taxroll
Wealth Star
Cancel
Save

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Identify, Update & Manage Data

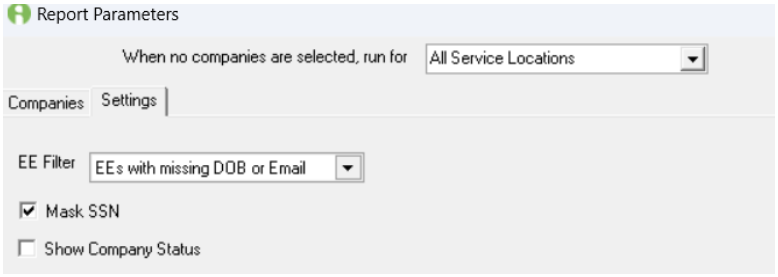
Multiclient Reports

Asure Portal Prioritization (S5351)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
CSR	Client Code	Company Code	Company Name	Company Status	EE Info	AHR	Active EE Count	Inactive EE Count	Email and DOB-Active EE On ESS	Email No DOB-Active EE On ESS	DOB And No Email-Active EE On ESS	No DOB And No Email-Active EEs On ESS	Email And DOB-Inactive EE On ESS	Email No DOB-Inactive EE On ESS
	MAZ32 -	MAZ00	Cats R Us	Active	Full Access	N	6	1	1	1	0	4	0	1
Mtest Kte	MAZ32 -	MAZ32	Dogs R Us	Active	Read Only	N	28	3	7	15	3	3	1	1

Asure Portal Onboarding – Multiclient (S5347)

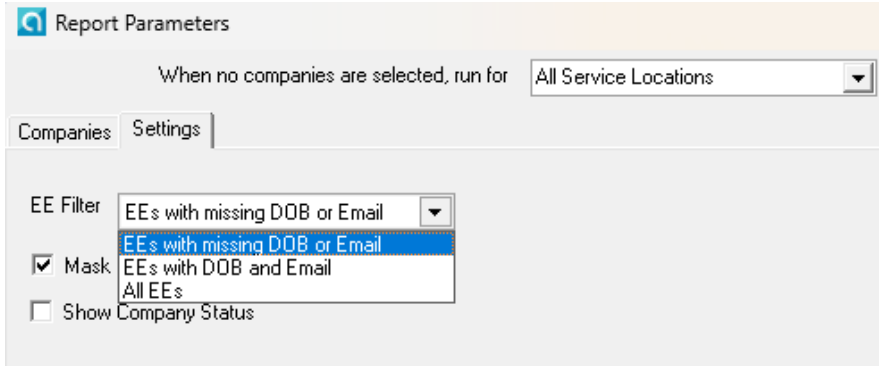
CSR	Company	Employee	Employee	SSN	First Nam	Last Name	DOB	Email
	MAZ00	15	Active	***-**-44	Wesley	Wilson		Test@Evolutionhcm.Com
	MAZ00	6	Active	***-**-55	Barney	Rubble		
	MAZ00	5	Active	***-**-45	Wilma	Flintstone		
	MAZ00	4	Active	***-**-89	Fred	Flintstone		
	MAZ00	3	Active	***-**-17	HR	Applicant		
Mtest Kte	MAZ32	26	Active	***-**-15	Freddie	Frank		Sample@Evolutionhcm.Com



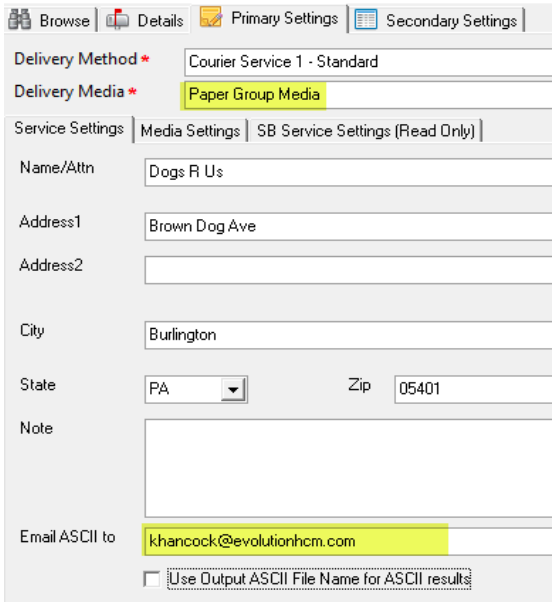
Company Level

Asure Portal Onboarding (S5345)

- Setup up twice to run with payroll
  - Once for missing data - "EEs with missing DOB or Email"
  - Once for data validation - "EEs with DOB and Email"
- Send to client via VMR
  - If payroll reports send to Paper type mailbox, verify "Email ASCII to" field is populated



	A	B	C	D	E	F	G	H
1	Company Number	Employee Code	Employee Status	SSN	First Name	Last Name	DOB	Email
2	Alpha	300	Active	***-**-3330	Employee	Multi Garnishment	1/31/1982	Email@Testemail.com
3	Alpha	290	Active	***-**-2990	Employee	ProRated CH Support	4/30/1967	
4	Alpha	440	Active	***-**-9641	DD Child Support	Employee	1/5/1965	
5	Alpha	390	Active	***-**-7011	Employee	1099		



Multiclient Reports

Asure Portal Onboarding Data Validation (S5356)

Checks for obvious validation errors

- Example 1: DOB will return as Invalid is the employee would be under 10 or over 90 years of age.
- Example 2: SSN would be invalid if the last four digits are 0000.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Environm	CSR	Company	Company	Company	Company E	Employee	Employee	Active Em	SSN	SSN Valid	Name Val	First Nam	Last Name	DOB	DOB Valid	Email	Email Valid
Asure Soft		MAZ00	Cats R Us T	Active	Full Access	15	Active	Y	***-**-44	Y	Wesley	Y	Wilson		N	Khancock	Y
Asure Soft		MAZ00	Cats R Us T	Active	Read Only	2	Involuntai	N	***-**-22	Y	Emma	Y	Spruiter		N	ldarling@	Y
Asure Soft	Mtest Kte	MAZ32	Dogs R Us	Active	Read Only	10	Active	Y	***-**-66	N	New	Y	Second		N	Khancock	Y

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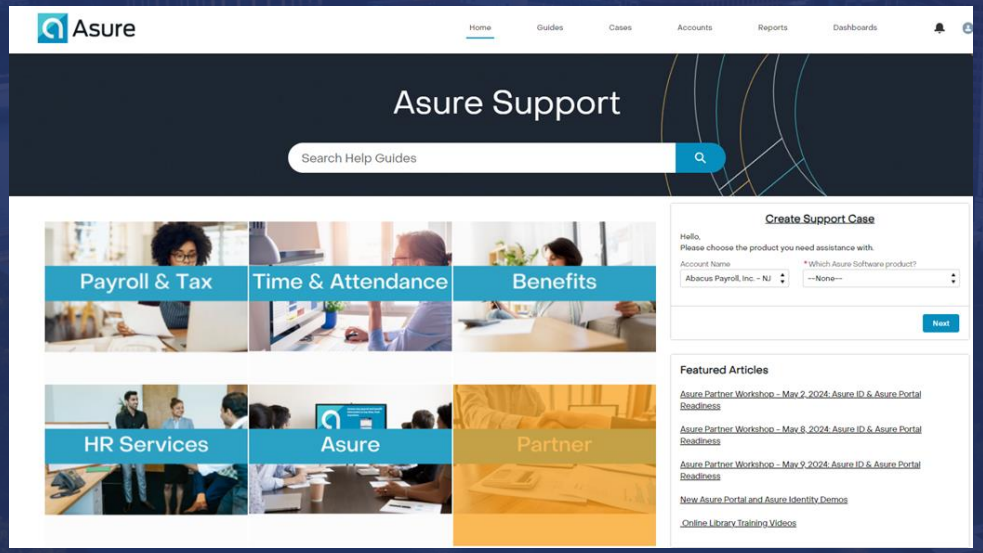
Resources & Workshops



- Asure Support Portal
- Asure Reseller Toolkit
- Workshops to help with your roll out.
- Thursday 6.13 and 6.27 4:00 - 5:00 PM EST

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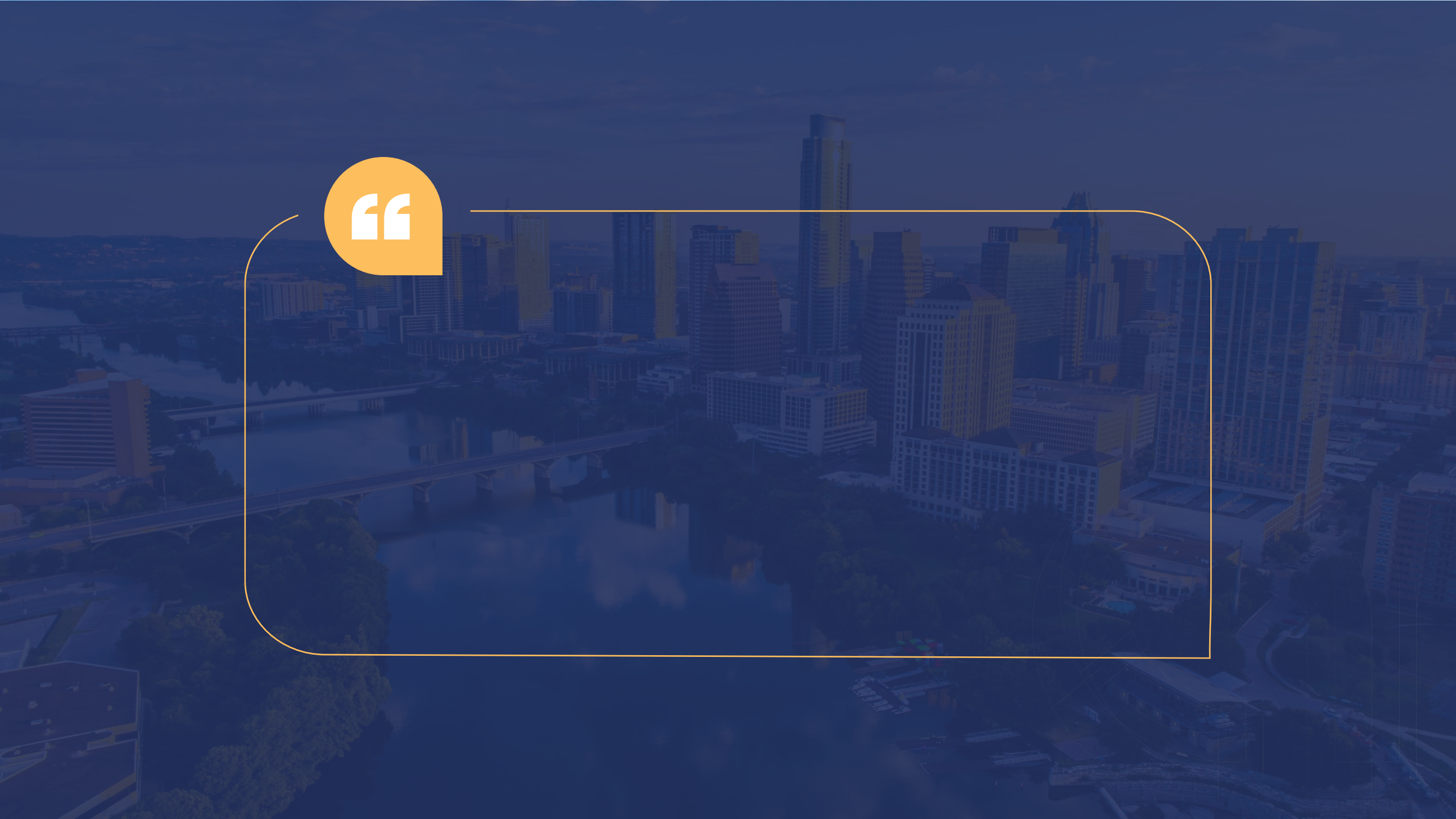
Q & A

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Thank You!
2024 Asure Reseller Partner Conference
Asure