

How to use Data Retriever

Manager Portal Guide







Getting Started

This guide will demonstrate how to use the Data Retriever tool to run and export reports using the PrismHR Manager Portal. You can use the Data Retriever tool to pull employee details like phone numbers and addresses. Log into your Manager Portal using the button below. Once logged in, continue onto the following steps.

Manager Portal Login

1. Open Data Retriever

In the **Search Bar** at the top of the page, search for **Data Retriever** and click on it in the Suggestions.



Data Retriever					
Step 1 - Select Client(s)	-	Step 2 - Add Fields	- Step 3 - Add Totals -		
		+ Name	Gross Earnings		
777700 Demo Client		+ Personal Detail	+ Time Sheet Table		
		+ Status Detail	+ Deductions		
		+ License Details	+ Company Tax		
		+ Emergency Contact	+ Employee Tax		
		+ Employment	+ Benefits		
		Employment	+ Retirement (401k)		

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2. Setting Filters

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In the Add Fields box, click on the **+ icon** to expand all searchable sub-fields. Any fields **toggled blue** will appear in the data retriever results.

3. Run & Export

When all desired filters have been selected, click **Run** in the top-right corner.

After the Data Retriever has finished running the report, click **Export Report** in the top-right corner to export the data to Excel.

Step 2 - Add Fields	
+ Name	
Employee ID	
Web User Id	
Sort/Search	
Last Name	
First Name	
Middle Name	
Nickname	
+ Personal Detail	
+ Status Detail	
	<u></u>
	Run
- Step 3 - Add Totals - + Gross Earnings + Time Sheet Table + Deductions + Company Tax + Empiryee Tax + Benefits	
Export Report	Run
Step 3 - Add Totals +	