



How to use Data Retriever

Manager Portal Guide

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Questions? Call 855-792-2808



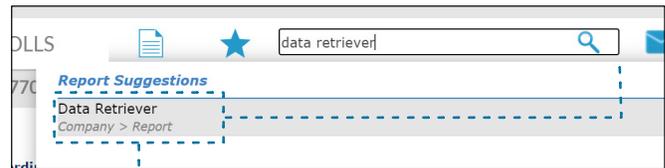
Getting Started

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.



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.



2. Setting Filters

In the Add Fields box, click on the **+** icon to expand all searchable sub-fields. Any fields **toggle 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.

