

Employer Services Portal Quick Guide

How to add a portal user

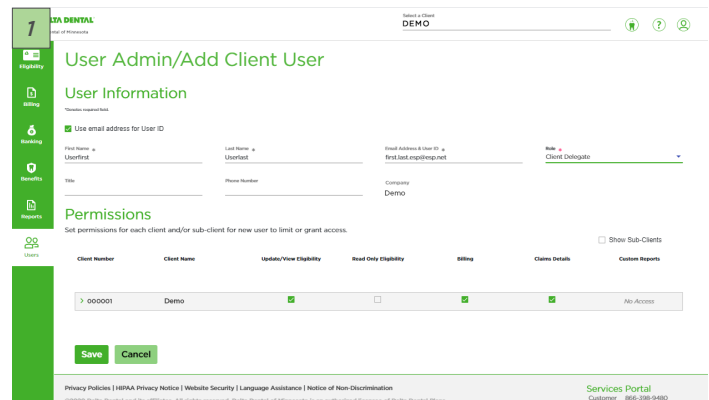
As the Super User, you have the ability to invite others within your company to be users of ESP. You may create Client Delegates or Client Users.

Client Delegates mirror the permissions of the Super User and also have the ability to maintain users in the portal. You are unable to change the permissions of a delegate, since they are kept consistent with the overall access of the Super User. If you wish to limit the access of a delegate, you would first change their role to Client User and update their permissions afterward.

Client Users have access only as it is assigned to them when they are set up. A Client User may be granted access to all or some of the portal functions and may be granted access to all or some of the client/sub-clients available to the Super User.

To create a new client delegate:

1. Select users on the left navigation bar.
2. Select add user.
3. Enter required user information, including selection of the user ID. The user ID may be the same as the user's email.
4. Select the role of Client Delegate.
5. The Client Delegates permissions will automatically be updated to reflect that of the Super User.
6. Click save.
7. Click on user admin in the page header to return to the manage client users tab. *(Image 1)*



To create a new user:

1. Select users on the left navigation bar.
2. Select add user.
3. Enter required user information, including selection of the user ID. The user ID may be the same as the user's email.
4. Select the role of Client User.
5. The company field will be pre-populated with your company.
6. In the permissions grid, select the functions you wish to grant to the new user.
7. To apply different permissions at the sub-client level, select the check box show sub-clients and select the appropriate functions for select sub-clients.
8. Click save.
9. Click on user admin in the page header to return to the manage client users tab. *(Image 2)*

