

User Creation MPR Document:

To create a user for a new Employee on MY Portal, we must create their records on three objects:

- 1. User**
- 2. Employee**
- 3. Member**

Let's look at creation of records for User Object first.

1. Log into MY Portal using Administrator role and navigate to User Object.
2. Click on the '+Create New' button available on the top right of the screen. This will open the layout selection pane.
3. Select 'PS User' layout to open the 'New' form for filling in employee details.

Note: New Employee details can be found in PS Data sheet in Biz-Tech sharepoint.

4. Fill in the following employee details on Basic Tab:

First Name
Middle Name
Last Name
Short Name
Employee Code
Login ID
Email ID
Gender
Band
Grade
Group
Sub Group
Mobile
Designation
PS Employee Status
PS Employee Type
Geography_PS
Region_PS
Country_PS
State_PS
Working Location
Date of Joining
Total Experience_PS
Import Date_PS
PS Reporting Manager 1

PS Reporting Manager 2
PS Reporting Manager 3
PortFolioOwner
PS Head of Department

5. On the User Scope Tab, assign the scope as Company.
6. On the Access Permission Tab, assign the role as ‘Default Role’
7. On the Travel Desk Tab, specify the values of the following fields:

Travel RM – Employee assigned Portfolio Owner
Travel HOD – Employee’s assigned HOD

8. Once all these details are specified and assigned, save the record.
9. The user record is now successfully created.

Note: The user is not yet active. To activate the user, we must assign them to a team.

10. Scroll down to the Teams listing on the newly created user’s details page and click on ‘Manage Team’.
11. A window pops up containing all the list of Teams on MY Portal. Select the ‘Default Team’ team and align the new user in it.
12. Once the user is align to the team, edit the user’s record and check the box of ‘Active’ field.
13. Click Save.

The employee’s User record is now successfully created and active.

Now let’s move on to Employee Object record creation.

1. Navigate to employee object using the Administrator role and click on the '+Create New' button available on the top right of the screen.
2. This will open the layout selection pane.
3. Select ‘Default’ layout to open the ‘New’ form for filling in employee details.
4. Fill in the following employee details on ‘Key Information’ Tab:

Name
Employee Code
User Name
Email
PS Login ID
PS Gender
PS Band
PS Grade

PS Employee Status
PS Employee Type
PS Designation
Mobile Phone
PS Employee Group
PS Employee Sub Group (DeptID for EmpAll)
Geography PS
Region PS
County PS
State PS
Working Location PS
PS Working Location
PS Reporting Manager 1
PS Reporting Manager 2
PS Reporting Manager 3
PS PortfolioOwner
PS Head of Department
PS Date of Joining
PS Import Date

5. On the Others tab, specify the value for Mobile Number field.
6. Save the details to generate an employee's record in Employee object.

The new employee record for the employee is now created on MY Portal.

The final record of the new employee will be created by importing its user record on Member object.

Let's look at how to create a member record for the new employee though import.

1. Log into MY Portal using Administrator role and navigate to Member Object.
2. Click on the 'Import Member' option available on the Toolbox card.
3. On the search listing parameter, specify the object type as User and type in the employee's name which is specified in the User Object record.
4. Select the relevant search result by checking the box next to their name and clicking 'Import'.

The employee's user object record is now imported into Member object, thus creating its member object record.

Performing these steps have ensured that all the User creation for a new employee is complete.