

WEBINAR SERIES

2024 PrestigePRO Enhancements

December 6, 2023



Today's Presenter



Joe Dodgson

Chief Information & Technology Officer
PrestigePEO

I have 25 years of experience in business service outsourcing industries. I have worked in PEO, Workers' Compensation, and technology industries. Prior to Prestige, I served as the COO of a PEO in St. Petersburg, FL. I worked in the Workers' compensation space providing Insurance to over 100 PEO's. I co-founded a PEO in Arizona. I have served as a technology and operations leader throughout my career. My success, has been and will continue to be, providing technology solutions to companies and clients to create a world class customer experience.

Today's Agenda

- UEX Form + Function = A greatly improved User experience
- Core Changes Employee/Manager
- Workflows Onboarding and Benefit Enrollment
- Enhanced Report Center and 2024 Roadmap

Webinar Forum

All participants are muted.

Please type questions in the side navigation panel and we will try to address most questions during today's session.

Today's presentation will be posted Online at prestigepeo.com/webinars

Report Center | Platform Evolution

Next Phase

- **Single Reporting Architecture:** Ensure the Platform in place can address the needs for the entire PrismHR Product Family
- **New Tech Alignment:** Platform Architecture that integrates with Data Warehouse and other modern data technologies
- **Support Basic to Advanced Users:** Technology / Interface to address simple Reporting Access to Power Users leveraging Advanced Functionality (*Calculations, Joins, Data Importing*)
- **Dashboards and Visualizations:** Ability to easily create Dashboards / Visuals not only in Report Center but embedded in other products
- **Accelerated Schedule:** Deliver all these requirements over the next 12 months

Report Center | New Future Functionality

- Create reports from Scratch
- Rename Column Headers
- Add Custom Field Calculations
- Create Data Visualizations
- Edit Joins on Existing Reports
- Model Data
- Schedule Reports in New Ways
- Create Business Rules
- **Data Import** - Provide ability to upload CSV data to Snowflake. Allows for cross reporting of existing and 3rd party data (summer 2024)
- **Report SQL** - Write SQL Statement for creation of reports or datasets
- **Streamlined Report Delivery** - Create and deploy new reports without the need Engineering / Development resourcing

Report Center

Advanced Functionality – Ad Hoc & Custom Reports, Easy as 1-2-3!

ADD NEW ELEMENT

DATA ELEMENTS

- TABLE
- VIZ
- PIVOT TABLE

INPUT TABLES

- EMPTY
- LINKED

UI ELEMENTS

- TEXT
- IMAGE
- BUTTON
- EMBED
- DIVIDER
- PLUGINS

Welcome, Dave! Where should we start?

I want to start with my data source
Great! Next, you'll try calculations, pivot tables, or visualizations

I want to use PrismHR's popular data sources

- Client-ID RLS **ENDORSED**
Development/Datasets/RLS Datasets
- Employee-ID RLS **ENDORSED**
Development/Datasets/RLS Datasets
- CLIENT_ACCESS
Prism-Prod/PRIISM_PROD/SECURITY
- CLIENT_MASTER
Prism-Prod/PRIISM_PROD/PUBLIC
- CLIENT_MASTER **ENDORSED**
Development/Datasets
- EMPLOYEE **ENDORSED**
Development/Datasets

Use any Table as a Starting Point

Join with: EMPLOYEE | Selected source: CLIENT_MASTER

Join type: Right outer join

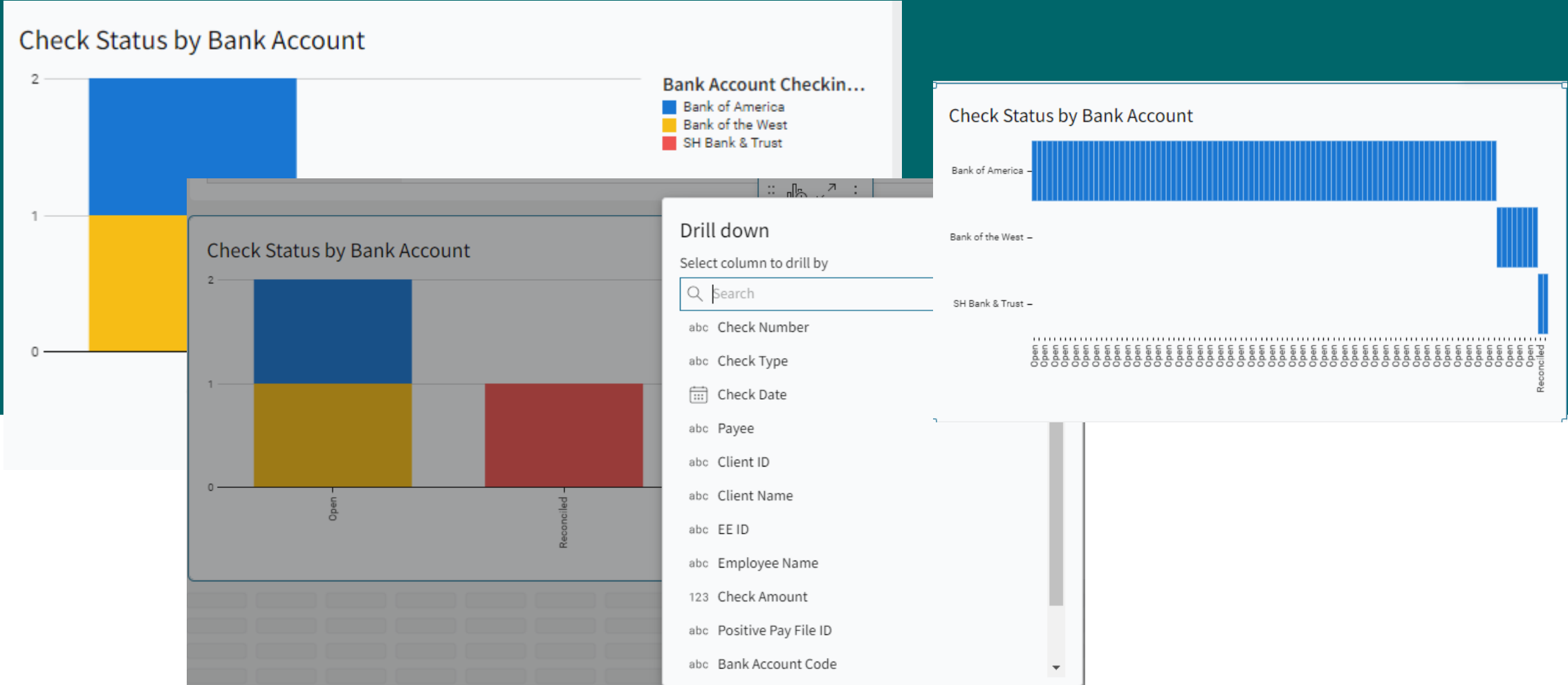
Join keys: abc Client ID = abc Client ID

EMPLOYEE	CLIENT_MASTER
Total key count	274
Total key count	404
Keys with no matches	0
Keys with no matches	130
Keys with 2+ matches	232
Keys with 2+ matches	232

-Add Table-Joins
-Review included Columns + Access

Report Center

Advanced Functionality – Drill Down into Data Visualizations



2023-2024 Roadmap Highlights

Phase I Next Gen RC

- Deployment of Next Gen RC
- Continue Dev for Data Reconciliation
- **Replicate RC Home page and Admin Center**
- **Introduction to new reporting interface**
- **Creation of dashboards**

Phase II Advanced Feature

- Continue buildout of Dashboards
- **Complete migration of all PHR Default reports to Snowflake and Next Gen RC**
- Set license type by user role
- **Sharing of reports**

Phase III WSM Acceleration

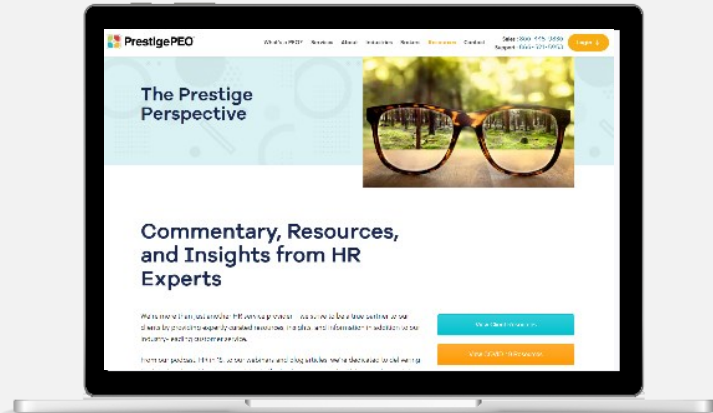
- **Importing of data into the warehouse**
- **Column level security for all attributes**
- Integration of **Dashboards** on worksite manager project.
- Update Benefit Reports
- Dashboarding for SMBs

Jan 24 (Beta)

Q1-24 (Live)

Q2-24 (PHR Live)

Questions / Comments / Discussion?

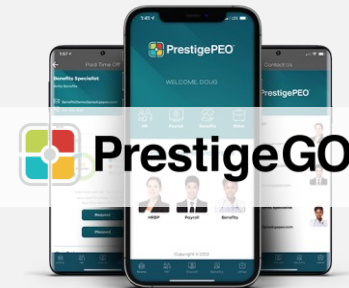


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