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Document Revision History

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<tr>
<td>1.0</td>
<td>2.0</td>
<td>10/19/2017</td>
<td>DRAFT in progress</td>
</tr>
<tr>
<td>1.1</td>
<td>2.0</td>
<td>10/25/2017</td>
<td>Added Creating a Service Account User (Appendix 1)</td>
</tr>
<tr>
<td>1.2</td>
<td>2.0</td>
<td>11/15/2017</td>
<td>Expanded Single Sign On Setup section</td>
</tr>
<tr>
<td>1.3</td>
<td>2.0</td>
<td>11/27/2017</td>
<td>Removed Legal Address required in Classic requirement</td>
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<tr>
<td>1.4</td>
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<td>3/15/2018</td>
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Audience and Additional Advanced HR 2.0 Documentation

The intended audience for this guide is Service Bureau administrators. It contains information about how to set up and use the Single Sign On feature in Advanced HR 2.0. The following is a list of the other Advanced HR 2.0 User Guides; all are available for download on the Evolution Resource Center:

- Applicant Tracking Guide
- Administrator Guide
- Benefits Guide
- New Employee Onboarding Guide
- Reporting Guide
- Security Guide
- Customizing Security Roles/ Users Guide
- Implementation Guide

Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR from the employee user point of view.

Evolution Resource Center

You can go to the Evolution Resource Center at [https://support.evolutionhcm.com](https://support.evolutionhcm.com) to view the latest Advanced HR 2.0:

- Training Guides
- User Manuals
- Instructional Videos
- Implementation Center Materials

Your comments are important to us. You can now enter your feedback directly online for any specific articles/topics in the Evolution Resource Center. We encourage you to tell us what you like, or what you
would like changed about Evolution documentation and training materials. We are committed to continually improving our product documentation for you.

Evolution Resource Center

You can also:

Email our Support Department for questions:

support@evolutionhcm.com or by calling 802-655-8347

Email our Training Department to schedule a training:

Training@evolutionhcm.com

Email our Implementations Team:

AHR_implementations@asuresoftware.com
Advanced HR 2.0 Single Sign On (SSO) Guide

Welcome to your Advanced HR 2.0 Single Sign On (SSO) Guide!

Overview of Evolution Single Sign On

The Evolution Single Sign On (SSO) feature will enable the user to easily access both Advanced HR 2.0 and Evolution Payroll. Single Sign On functionality is part of the “Stowe” Release in Evolution Classic. Single Sign On will allow users to access the Advanced HR 2.0 system and have access to Evolution Payroll, if required, without the need to enter their User Credentials multiple times or without using different usernames or passwords.

There are preliminary steps that need to take place, but once SSO is enabled by the Evolution IT Department, however, and the user signs in, the service will authenticate the end user for all the applications the user has been given rights to. This will also eliminate the need for further prompts when the user switches applications during the same session. In this guide we’ll outline the steps necessary to enable this functionality.

Advanced HR 2.0 is the first system in the Evolution HCM product line to utilize the new Single Sign On functionality. As we continue to update the product lines, Single Sign On will be rolled out for different products in the future.

Some important points about the Evolution Single Sign On feature are:

- Provides access to two (or more) systems.
- Once Single Sign On is activated, it is on for all users who will be taken to a new login screen.
- Requires some pre-work before it can be enabled, including creating AHR Security Groups and creating a Service Account User in Evolution Classic (see Appendix 1 & 2).
- Requires the Service Bureau to be on the latest “Stowe” version of Evolution Classic.
- The actual SSO functionality is only for users that need to access payroll functions, although all users will login with the new Evolution login screen.
- User Email Addresses will be required for all users when Single Sign On is turned on (Admin – Security – Users in Evolution Classic).
When clicking on the URL for either Advanced HR 2.0 or Evolution Payroll, the user will now be taken to the Single Sign On login screen.

The employees email address should be entered into Evolution Classic prior to the Payroll Cutover. This can be done using EvoExchange. If the email address is not added prior to the Payroll Cutover, users will have to manually populate the email prior to enabling the Employee for Self Service.

**Note:** It is important to note that Single Sign On (SSO) functionality is for those users who need to access Evolution Payroll functions AND Advanced HR 2.0 functions. For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need the SSO functionality (although they also use the new SSO login screen).

## Evolution Classic and Single Sign On Setup

The Single Sign On feature setup requires the following tasks be performed in Evolution Classic. These tasks are listed below and the details of each are described in the following sections or in the Appendix sections of this guide.

- **AHR 2 Security Groups** must be setup.
- **User Email Addresses.**
- **Activate Evolution SSO.**
- **Employee Email Addresses.**
- **Future Dated Fields.**
- **E/D codes.**
- **Verify the company legal name and address.**
- **Create a Service Account User.**

- **AHR 2 Security Groups** must be created and assigned to users
  - The **AHR 2 Security Groups** must be created to ensure the proper Payroll Rights are assigned to users who need access to Payroll data. Refer to **Appendix 2 – Creating Security Groups in Evolution** in this guide

- **Payroll and User Email Addresses**
  - **Evolution Classic user** email addresses are required for all users when Evolution Single Sign On is activated. The user email address must be valid and unique. Update Evolution
user email addresses in the **Admin - Security - Users - Details** tab in Evolution Classic. This is required for Single Sign On access.

- **End User Employee Email Addresses**
  - All **Employees** must have an unique email address in order to access Advanced HR 2.0 and their Employee Dashboard. The employee’s email address should be entered into Evolution Classic (**Employee – Employee – Self Serve** tab) prior to the Payroll Cutover process. This can be done using EvoExchange. If the email address is not added prior to the Payroll Cutover process, users will have to manually populate the email address prior to enabling the Employee for Self Service. These will become the Usernames for the Employees in Advanced HR 2.0. See the details below.

- **Turn On SSO**
  - Evolution’s IT Department will enable SSO functionality when you are ready. See the details below.

- **Future Dated Fields - AHR 2.0 Onboarding Validation Report (S3550)**
  - The Payroll Cutover process will not bring over any future effective date information that is AFTER the actual payroll cutover date. Because of this, it is necessary to find the items that have a future effective date, and remove the future information prior to the cutover. If the information is not removed, the fields in question will be blank in Advanced HR 2.0. Once the information is removed in Evolution Classic, and the Company has been cutover into Advanced HR 2.0, the information can then be re-entered into the Advanced HR 2.0 system with the future effective date again.

  For this purpose, we have developed a **Company Level** report, that when run, will display the fields listed for each employee that has a future effective date. This report is the **AHR 2.0 Onboarding Validation Report S3550**. This report is pulled from the SB Reports and then added to the company. You copy this report to each company that it will be run on.

- **Employee Positions**
  - For use in Advanced HR 2.0, employees must have a position assigned to them. See the details below.

- **Tax Forms and W-2**
  - In order for the W-2 and other Tax forms to show in the Employee Self Service, settings need to be made in the **Annual Returns** section of the **Employee – Employee – Self Serve** tab in Evolution Classic. See the details below.

- **E/D Codes**
  - The “**Show in EE Portal**” option must be enabled on Scheduled E/Ds that will be used in Self Service. See the details below

- **Company Info**
  - Go to the **Company – General – Company Info – Payroll Products** tab and update the following fields:
    - **Payroll Product** – set to **Evolution HCM**
    - **HCM URL** – Enter the Advanced HR 2.0 URL.
• **Allow API Access** - This field needs to be set to *Yes* for any users other than a Super User to be able to see the company in the Payroll Cutover company list.

  • **Service Account User**
    - This is the integration user. Refer to Appendix 1 – Creating a Service Account User in this guide.

### Payroll and User Email Address

Evolution Classic user email addresses are required for all users when Evolution Single Sign On is activated.

Update user email addresses in the **Admin - Security - Users - Details** tab in Evolution Classic. This is required for Single Sign On access.

Go to **Admin – Security – Users – Details** tab. Make sure the **E-Mail Address** field is populated.

**Admin-Security-Users-Details**

- **Payroll Users**
- **Required for Single Sign On**
- **Enter User’s Email Address**
  - This must be unique!
End User Employee Email Address

In addition to Evolution Classic user email addresses required for all users when Evolution Single Sign On (SSO) is activated, all Employees must have a valid, unique email address in order to access Advanced HR 2.0 and their Employee Dashboard.

The employee email address is entered in Employee – Employee, Self Serve, Settings pane in Evolution Classic in order to access the Employee Self Service. These will become the Usernames for the employees in Advanced HR 2.0.

Go to Employee – Employee - Self Serve tab: Employees must have a unique email address in order to access Advanced HR 2.0 and their Employee Dashboard.

The employees unique email address should be entered into Evolution Classic prior to Payroll Cutover.

The employee’s unique email address should be entered into Evolution Classic prior to the Payroll Cutover Process. This can be done using EvoExchange. If the email address is not added prior to the Payroll Cutover, users will have to manually populate the email address prior to enabling the Employee for Self Service.
Enabling Single Sign On

Once you have updated to the Stowe version of Evolution, contact Evolution Support to start the process of enabling your Single Sign On functionality.

- Contact Evolution HCM Support:
  Support@evolutionhcm.com
  802-655-8347 Ext 3
- A non-billable case will be created:
  - SaaS customers – Evolution HCM IT/Network Operations team will perform the maintenance necessary to turn on SSO.
  - Self-hosted customers – You will be provided with instructions on how to run the process to turn this on at your bureau.

It is important to note that SSO functionality is for those users who need to access payroll functions AND Advanced HR 2.0 functions. For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need SSO functionality, although they also use the new Evolution login screen.

Also remember, that for Self-hosted customers, you will be provided with instructions on how to run the process to turn this on at your service bureau.

When ready, contact Support and a non-billable case will be created.

Future Dated Fields

The Payroll Data Cutover process will not bring over any future effective date information that is after the actual payroll cutover date. Because of this, it is necessary to find the items that have a future effective date, and remove the future information prior to the cutover. If the information is not removed, the fields in question will be blank in Advanced HR 2.0. Once the information is removed in Evolution Classic, and the Company has been cutover into Advanced HR 2.0, the information can then be re-entered into the Advanced HR 2.0 system with the future effective date again.

For this purpose, we have developed a Company Level report, that when run, will display the fields listed for each employee that has a future effective date. This report is called the AHR 2.0 Onboarding Validation Report S3550. This report is a Company Level Report that must be pulled from the SB Reports and then added to each company that will be cutover. In Evolution Classic, go to Bureau - Company Default Reports to find this report.
The **S3550 report** will highlight:
- Name (first, middle initial, last)
- Social Security Number
- Current status code
- Salary amount
- Rate number
- Rate amount
- DBDT fields
- Default Workers Comp

Remember, that this report is pulled from the **SB Reports** and then added to the company. Copy this report to each company that it will be run on.

Once the future dated fields are identified, it will be necessary to manually change them to the current date (Cutover date). Again, the reason for this is that Advanced HR 2.0 will not recognize future dates as valid. After the dates have been changed to the date of the Payroll Cutover, the user can then perform the cutover.

**Note:** It is highly recommended that you save the S3550 Report. After the Cutover, it will be the only record of any future changes to the employee’s information.
Updating Company Information

The final step in Evolution Classic is to update Company information that will enable access:

To update company information, go to Company-General-Company Info-Payroll Products tab and update the following fields:

1. The Payroll Product needs to be set to Evolution HCM.
2. The HCM URL is your Advanced HR 2.0 URL.
3. Allow API Access is set to Yes.
4. To allow employees access to request time off, the Employee Self Serve option button should be selected.
5. Once the Payroll Data Cutover has completed, the HR dropdown will automatically be set to Advanced HR 2.0. Remember, that after the cutover, the employee fields that have been migrated over will be locked down in Evolution Classic.

Employee Positions

For use in Advanced HR 2.0, employees must have a position assigned to them. The Position field from Evolution Classic, under Employee – Employee, Details, does NOT flow from Evolution Classic into Advanced HR 2.0 currently.

The positions can be specific or a generic space filler position. Gather this information before starting your Payroll Cutover. Once the Payroll Cutover has completed, you can create the Positions in Advanced HR 2.0 in Company Setup – Position, and then assign the position to the employee records in Employee Maintenance – Employee Detail.

Tax Forms and W-2

In order for the W-2 and other Tax forms to show in the Employee Self Service, the settings in the Annual Returns section of the Employee – Employee – Self Serve tab in Evolution Classic must be updated to:

- Form on File - Yes
- Format - Both or Electronic

Note: Form on File indicates that you have received consent to supply the employee’s W-2 electronically instead of a paper copy.
E/D Codes

Prepare the E/Ds for use in Advanced HR 2.0. In Evolution Classic, go to the Company – E/Ds – Details tab. Find the E/Ds that will be used in Advanced HR 2.0 for Direct Deposit and Benefits (both Employee and Employer contributions). On these E/Ds, set the Show in EE Portal option to Yes.

![E/D Details](image)

Set Show in EE Portal to Yes.

Company Info

Go to the Company – General – Company Info – Payroll Products tab and update the following fields:

- **Payroll Product** – Set to Evolution HCM
- **HCM URL** – Enter the Advanced HR 2.0 URL
- **Allow API Access** – This option needs to be set to Yes for any users other than a Super User to be able to see the company in the Payroll Cutover company list.

![Payroll](image)

Set the Payroll Product to Evolution HCM.

Set the Allow API Access to Yes.
Service Account User

One of the first steps required for Single Sign On (for Advanced HR 2.0) is to create a Service Account User in Evolution Classic. The Service Account User is a non-user account in Evolution Classic for the purpose of enabling Single Sign On access. This user account is what Advanced HR will use to access Evolution Classic. This is the Integration User. This account should be set to Full Access.

The Service Account User is a non-user account in Evolution Classic for the purpose of enabling Evolution Single Sign On access.

This account should be set to Full Access:

Important! This is a “Non-User” Account. Do not use this Service Account for other purposes than Enabling SSO. Do not log into Systems with this account once Security Questions have been defined.

Refer to Appendix 1: Creating a Service Account User in this guide to learn how to set up a Service Account User.
Evolution Single Sign On and Security Roles

Access and functionality in Advanced HR 2.0 is dependent on a user’s Security Role. In Advanced HR 2.0 there are four **end user** security roles:

- Base User Anonymous
- Base User
- Base Manager
- Base Admin

There are also two security roles that are primarily designed for the **back end Service Bureau** user:

- Super Admin
- Service Bureau Admin

For the purposes of this user guide, we will focus on Advanced HR 2.0 and the roles of Super Admin, Service Bureau Admin, and any other company level employees that need access to both Advanced HR 2.0 and Evolution Payroll.

As has been discussed in the *Advanced HR 2.0 – Security Guide*, users and their security roles can be created and assigned in Advanced HR 2.0. However, with the introduction of SSO, you will be able to create users with payroll access in Evolution Classic as well. For these users, it is recommended that you follow the following workflow.

---

**Enabling the Super Admin User and Single Sign On**

Super Admin users, in Advanced HR 2.0, have complete access to all companies, users, and setting functions. These users administer access for the Service Bureau Admin and all Client Users. The Super Admin is an employee of the service bureau. It is best practice to only have 2 or 3 Super Admin level users.

*Note:* It is best practice to create, and or, designate Super Admins, Service Bureau Admins, and any other company level employees that need access to Evolution Payroll, such as Payroll Managers, in Evolution Classic.
Creating a Super Admin User Pre Payroll Cutover

If the Service Bureau has not performed a Payroll Data Cutover on their own company, and Super Admin(s) status needs to be created, they should create the Super Admins in Evolution Classic first:

To create a Super Admin user pre-Payroll Cutover in Evolution Classic:

1. In Evolution Classic, go to Admin – Security - Users. Find the user you would like to designate as a Super Admin. Click on the Details tab.

2. Enter a valid Email Address.

3. Using the AHR User Type options buttons, select the Super Admin option as the AHR User Type.

4. Click Post and Commit.

5. When clicking on the URL for either Advanced HR 2.0 or Evolution Payroll, the user will now be taken to the Evolution Single Sign On login screen, as shown below.
Creating a Super Admin User Post Payroll Cutover

If the Service Bureau has performed a Payroll Data Cutover on their own company, and Super Admin(s) status needs to be created, as in the previous example, they should add the Email Address and AHR User Type in Evolution Classic first:

If they are a New Employee, they will need to be onboarded to Advanced HR 2.0 as an employee first.
1. Go to Admin – Security - Users. Click the green Add button to create a new user.
2. Follow the steps above to enter the Email Address and select Super Admin as the AHR User Type.
3. Attach the user to the employee record. This will make their login for both Advanced HR 2.0 and Evolution their email address.

For SaaS Clients:

It is important to note that if the client is a SaaS Client, the user name will be in the following format for Evolution Classic:

name@address.com@evolutiondomain

The example at left shows an email address with the Evolution Domain added at the end of it.

Enabling the Service Bureau Admin User & Single Sign On

A Service Bureau (SB) Admin is a user in Advanced HR 2.0 that has limited access to companies, users, and settings. These users administer access for the assigned client users. The SB Admin is an employee of the Service Bureau. The steps outlined below are similar to the ones listed previously.

Service Bureau (SB) Admin User:
- Has limited access to companies
- Administers access for assigned client users
- Is an employee of the service bureau
Creation of the SB Admin follows the same workflow as creating a Super Admin. See the previous steps. The only difference is that the AHR User Type; it needs to be set to SBAdmin instead of SuperAdmin:

Enabling Other Company Level Employees for SSO

Evolution SSO functionality can also be utilized by other company level employees who have access to payroll functions, such as Payroll Managers. The setup will be similar to Super Admins and Service Bureau Admins. However, you should be aware of some important differences for Other employees:

- **Security Level** should be set to Manager.
- The **AHR User Type** should be set to Other.
- AHR Groups should be assigned.

Pre-Existing Users

First, let’s look at pre-existing users. These are Client Users that are currently designated as Remote or as a Web User.

Perform the Payroll Data Cutover:

1. Once the Cutover is successfully executed, you’ll need to assign the correct AHR Groups and User Rights. These should be assigned in Evolution Classic.
   a. Go to Admin – Security - Users. Find the user you would like to designate with the proper groups. Click on the Details tab.
   b. Verify that the user has a valid Email Address.
c. **Security Level** should be set to Manager.

d. For the AHR User Type field, select the Other option.

e. Click **Post** and **Commit**.

2. Ensure that the proper Evolution Security Groups are assigned.
   a. Depending on the user’s role, they should be assigned one of these groups:
      - AHR 2 Company Group
      - AHR 2 Payroll Group
      - AHR 2 Employee Group
   b. Each Security Group allows for different functionality. See Appendix 1.

   c. Remember, all Current Evolution Classic or Evolution Payroll users who will access Advanced HR 2.0, must be assigned the group or groups that fit their job duties.

3. The user logs into Advanced HR 2.0 using their Evolution login credentials.

4. The user logs out.

5. A **Super Admin** or **Service Bureau Admin** logs in to Advanced HR 2.0:
   a. Assigns appropriate **Security Role**.
   b. **Links** the Role.
   c. Clicks the **Save Changes** button.
To assign a Security role:
1. Go to HR Admin - Company - User List.
2. Select the User and scroll down to the Links section.
3. Use the Search box to select the Role.
4. Click the green Link Role button.

**Note:** It’s best practice to verify the Company Assignment and link to the Employee Record in Advanced HR 2.0.

Creating New Users in Advanced HR 2.0

Now, let’s review the process for creating new users in Advanced HR 2.0. These new users could be a new employee, or an existing employee, that has been given access to payroll (possibly through promotion).

1. Add the new employee manually in Advanced HR 2.0.
   a. If they are a Manual Hire, go to HR Admin - Employee Actions - Add New Hire.
      
      b. Follow the steps in the Add New Hire wizard.
2. Or, Add the new employee through **Self-Service**.
   a. If they will be onboarded through Self-Service, go to **HR Admin - Onboarding - Onboard Prep**.
   
   ![Onboarding Process]

   b. Follow the steps to send the new hire the **Self-Service Onboarding** link.
   c. The new hire will complete the Self-Service Onboarding wizard and **Submit** their information.
   d. Go to **HR Admin – Onboarding - Onboarding Dashboard** to view and Approve the new hire.
e. While reviewing the new hire’s information, use the **Quick User Add** function.

The **Quick User Add** feature allows you to create a user in Advanced HR 2.0, attach them to a company, and assign a Security Role quickly and easily.

Assign a Role at this time. This will allow the new hire a level of access to the system that is dependent on their function within the company. In addition you can **Send a Welcome Email**. The Welcome Email will instruct the new hire how to access **Self Serve Onboarding**. For our purposes here, however, the toggle for the Welcome Email should be set to **No**. Since they are not actually approved for hiring yet, it may be premature to send a welcome email.

3. Assign Evolution access.
   a. Go to **HR Admin - Company - User List** and select the user.
   b. Using the **No/Yes** toggles, update the **User Record** for payroll access – set the **Payroll Rights Granted** field to **Yes**. This will let Evolution know that they are an Evolution User as well.
   c. This access corresponds with the security groups that were created in Evolution Classic.
Moving Between Advanced HR 2.0 and Evolution Payroll

Now that access Evolution SSO has been granted, the user, while logged in to Advanced HR 2.0, has the ability to easily jump to Evolution Payroll and back again.

1. Go to HR Admin - Quick Links - Evolution Payroll.

Note that Managers and other company level employees – if granted the SSO access to the payroll security group as described previously, will also have a Quick Links – Evolution Payroll menu item on either their Manager Service tab or My HR tab in order to allow these users to move between Advanced HR 2.0 and Evolution Payroll, if applicable.

2. When clicked, a new browser tab will automatically open for the user’s Evolution Payroll environment.

Note: When accessing the User Rights in Evolution Classic, you can change the settings for a user by right-clicking on the Plus and Minus sign icons. Doing this will either grant permissions or take them away from the user.
Appendix 1: Creating a Service Account User

One of the first steps to do for Single Sign On is to create a Service Account User in Evolution Classic. The Service Account User is a non-user account in Evolution Classic for the purpose of enabling Single Sign On access. This could also be referred to as the Integration User. This user account is what Advanced HR 2.0 uses to access Evolution Classic. This account should be set to Full Access.

Service Accounts are best created by users who have full access to Evolution Classic.

To create the account, create a new user in Admin – Security - Users. Follow the instructions below in creating this integration user account.

- Go to Admin – Security – Users.
- Click on the green Plus Sign (+) to create a new user.
- Give the Service Account User a unique ID
- Set the Security Level to Administrator
- Set the AHR User Type to SuperAdmin
- Set the Password Change Date far into the future (such as 12/31/2099)
- On the Groups tab, Assign the Full Access and Access to New Clients Group. If your Full Access group has been modified, update the user rights for this User ID to have Full Access.
- Once the Service Account User has been created, log into Evolution with this Service User Account and set up any Security Questions.

More screenshots and details below.
Once the Service Account User has been created, log into Evolution with this Service User Account and set up any Security Questions.

**Important!** This is a “Non-User” Account. Do not use this Service Account for other purposes than Enabling SSO. Do not log into Systems with this account once Security Questions have been defined.

Evolution Support will send you a URL and a Verification code that you will need to enable the newly created Service Account User for Single Sign On. Once you receive a success message enabling the Service Account, contact Evolution for turning on SSO.

For users that will be using Evolution Payroll and Advanced HR 2.0, special security groups will need to be created and assigned. See Appendix 2: Creating Security Groups in Evolution.
Appendix 2: Creating AHR 2 Security Groups in Evolution

Creating Security Groups in Evolution Classic and assigning them to users, allows you to assign specific functionality to users based on their access needs and job responsibilities. For users that will be using Evolution Payroll and Advanced HR 2.0, special security groups will need to be created and assigned. These groups will allow a user’s access to fit their job duties.

AHR 2 Security Groups

**AHR 2 Security Templates** have been added to Evolution Classic. With regards to Advanced HR 2.0, the following Security Groups need to be created:

- AHR 2 Company
- AHR 2 Employee
- AHR 2 Payroll

With each group, comes default user rights that allow different levels of access. These default settings can be changed, however. For example, the **AHR 2 Payroll Group** will need to be adjusted to give the group the minimum rights that your Service Bureau allows for users. Remember that neither **Submit Payroll** or **Directly Process Payroll** are currently selected. Update the Security Functions as prescribed by your bureau’s process with your client’s need for access.
Creating the AHR 2 Security Groups

To create a Security Group in Evolution Classic:

2. Click on the green Plus Sign to create a new record:

3. Click on Post and Commit.
4. Next, click on the Group Rights button.

5. Select the AHR template from the System Template dropdown.
6. Click on Yes when asked if you want to apply the template.
7. Save and repeat until all three security groups have been created.

As previously mentioned, the **AHR 2 Payroll Group** will need to be adjusted to give the group the minimum rights that your Service Bureau allows for users. Remember that neither **Submit Payroll** or **Directly Process Payroll** are currently selected as user rights. Update the **Security Functions** as prescribed by your bureau’s process with your client’s need for access.

8. Next, assign the **AHR 2 Payroll Group** to users. Go to **Admin – Security – Users - Groups** tab:

9. On the **Groups** tab, highlight the newly created group and click **Add**.

10. **Post** and **Commit** all changes.

These groups must be added to your Internal Service Bureau Staff that will be accessing Advanced HR 2.0, as well as your clients that will be accessing Advanced HR 2.0 and Evolution Payroll.
Appendix 3: Forgot Password Feature - Single Sign On (SSO)

This section describes how to use the Evolution Single Sign On (SSO) Forgot Password feature which you can use to reset your Evolution Single Sign On password if you have forgotten it or want to change it.

Evolution Single Sign On (SSO):
- Provides access to two or more Evolution systems including: Evolution Advanced HR 2.0 and Evolution Payroll.
- Once Single Sign On is activated, it is on for all users who will be taken to the new SSO login screen.
- User Email Addresses are required for all users when Single Sign On is turned on (Go to Admin – Security – Users in Evolution Classic).
- Requires the Service Bureau to be on the latest “Stowe” version of Evolution Classic

To Reset a User’s Evolution Single Sign On (SSO) Password

If a user has forgotten their password or wants to change their Single Sign On password:
1. From the Evolution Single Sign On login screen, the user clicks the Forgot Password? link at the bottom of the screen.

3. The user enters their **username** in the **Username** field and then clicks the **Request Reset Link** button at the bottom of the screen.

4. The system displays a **Reset Link Sent** screen confirming that a password reset link has been sent to them. It also reminds them to check their email Spam folder if they don’t see the email soon.
5. The user receives the email which provides them with a Reset My Password link. The user clicks on the **Reset My Password** button.

6. The system displays the **Reset Password** screen.

The user enters their new password in the **New Password** field and then enters it again in the **Confirm Password** field.
Passwords must have:

The user must enter a password that meets the following requirements:

- Must contain at least 10 characters
- Contain an uppercase letter
- Contain a special character
- Contain a number

As the user starts typing the password, the screen displays a checkmark (✓) for each requirement that has been met. For example, the user types in a special character and the screen displays:

![Password Requirements](image)

The system checks off each password requirement that has been met as the user types.

Note: If the password the user enters in the New Password and Confirm Password fields are not identical, it displays a “Passwords do not match!” error message. The user should then reenter both password fields.
7. After entering both Password fields, the user clicks the **Reset Password** button at the bottom of the screen.

8. The system confirms that the user’s password has been changed.

9. The user can click the **Sign In** button to sign in to the application.