





ADD USERS TO THE PLATFORM

Definition: A user is someone within your organization who can access assessment events and candidates'/employees' information.

We recommend limiting the users to only those who are **directly involved in decisions** (e.g., members of HR, recruiters, and department managers). Please note that only individuals with Talent Manager permissions can add users to the platform.

It's easy to add new users with these three steps!

ASSESSMENT PLATFORM

The platform can be accessed at platform.connect2vista.com



3 STEPS TO ADD USERS

STEP 1: Click on your name in the top right to see a drop-down menu. Select **"Settings"**

invista. DASH	BOARD SOLUTIONS	ASSESSMENT EVENTS	PEOPLE			John Doe
Dashboard						Settings Help Center
3 new events cr	eated	high perform	er	25% con	npletion rate across en events	Log Out Create New Assessment Event
Recent Asses	sment Ever	nts 6 mo	onths -	Search: Search		
ecent Asses	Sment Ever	Location ¢	People *	Search: Search	Completion Rate	
ent Name ©	Event Type ©	Location 0	People *	Search: Search 1 High Performers ©	Completion Rate ©	2 Import Candidates or Employe
Recent Asses	Event Type © Development Recruitment	Location ©	People * 2 people 1 person	Search: Search (High Performers * 1 High performers 0 High performers	Completion Rate © Completion Rate S096 Completion rate 096 Completion rate	Import Candidates or Employe

STEP 2: On the left menu pane: Click the **"Users"** tab. You'll see everyone who has access to your organization's account.

Click the blue **"Invite New User"** button.

invista. Dashboari	D SOLUTIONS ASSESSMENT E	VENTS PEOPLE				John Doe
Home > User Settings						
Settings Account Information	Users				Search:	
Password/Security	User Name ©	E-mail Address 🔅	Invited Date *	Accepted Date ©	Role	Display Archived Users
Branding	Example User				Talent Manager	🖬 Archive 😰 Edit
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anding Page	Example User				Talent Manager	🖾 Archive 🕼 Edit

3

STEP 3: An **"Add New User"** dialog box will appear. Use the dialog box to add the person's information and role.

Click the **"Save"** button. Immediately after saving, the person will receive an email to create an account.

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First Name*	Last Name*
First Name	Last Name
E-mail Address*	
E-mail Address	
Role*	
Select Role	~
* = required	Cancel Save



UNDERSTANDING ROLE DEFINITIONS

The platform offers three types of user roles, each with different levels of permissions for creating assessment events, managing candidates/employees, and changing account settings.

ROLE	ACCESS	RECOMMEND USER
TALENT MANAGER	 View all Assessment Events Edit all Assessment Events Change Account Settings 	Recommended for HR managers and directors who will interact with the platform the most and need access to all Assessment Events and personal information.
RECRUITER	 View Assessment Events They Create Edit Assessment Events They Create 	Recommended for recruiters and individuals who only need to manage a few assessment events.
EXECUTIVE	View all Assessment Events	Recommended for leaders or individuals who may need access occasionally but don't need access to all information.



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