invista.™

ADDING USERS
GUIDE

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.

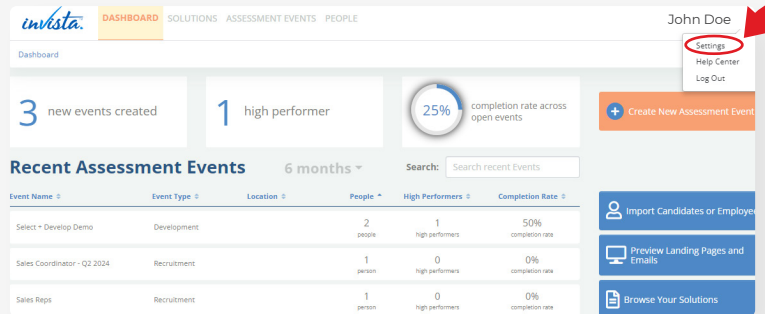**It's easy to add new users with these three steps!**

ASSESSMENT PLATFORM

The platform can be accessed at
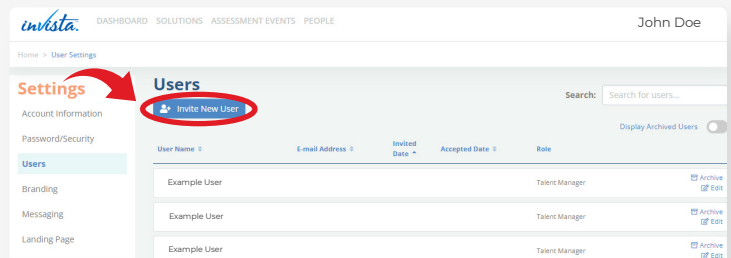**platform.connect2vista.com**

3 STEPS TO
ADD USERS

1

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

2

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.

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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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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.