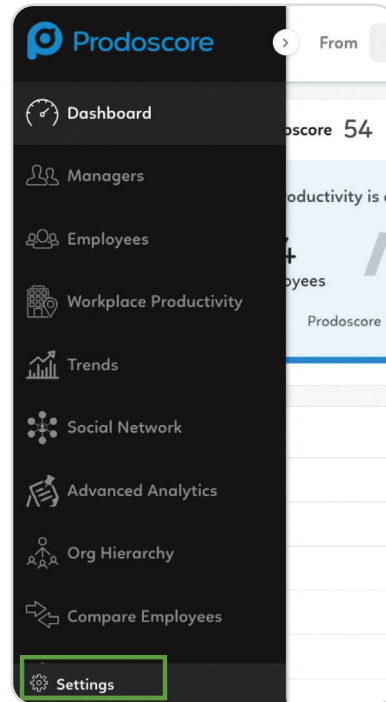
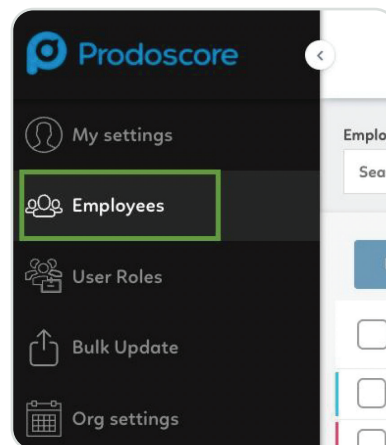


PART 1: Assign a Role

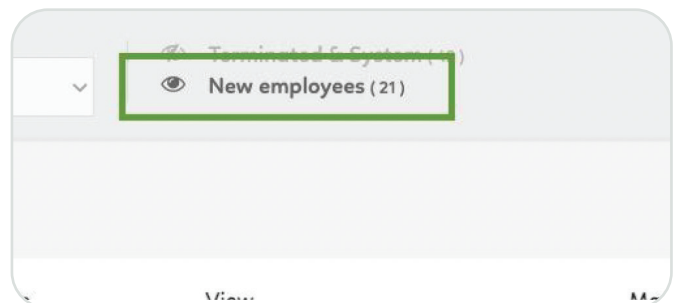
- 1 Go to **Settings** in the left menu



- 2 Click **Employees**



- 3 Click **New Employees** on the upper right



- 4 Find the employee you'd like to add.
Choose a **User Role** for them from the dropdown list.

5

Note: Assigning the User Role is mandatory to activate the employee. Once assigned, it will use a license.

The screenshot shows the 'Employee' management interface. At the top, there are filters for Employee, User role, Manager, and Department. Below these is a 'Bulk Action' button. The main table lists employees with columns for checkboxes, Employee Name, Time Zone, Department, User Role, and View. The 'Prodoscore Test' row is highlighted, and the 'User Role' dropdown menu is open, showing 'Not Activated' as the selected option. The 'View' dropdown for this row shows 'Self', 'Team', and 'Company' options.

6

Choose a **Department** from the dropdown list

The screenshot shows the 'Employee' management interface. The 'Department' dropdown menu for the 'Prodoscore Test' row is open, showing 'Unassigned' as the selected option. The 'View' dropdown for this row shows 'Self', 'Team', and 'Company' options.

7

Assign their **View**

Self - They will only see their score & the average score for others in the same role.

Team - This is intended for Managers. They will see anyone who lists them as their manager.

Company - They will see company-wide data and scores

The screenshot shows the 'View' dropdown menu. It has two rows of buttons: 'Self', 'Team', and 'Company' for the first row, and 'Self', 'Team', and 'Company' for the second row. The 'Self' button in the first row is highlighted.

8

Assign a **Manager** if they have one.

Other Manager can be assigned if that person has multiple managers. For example: their manager's manager.

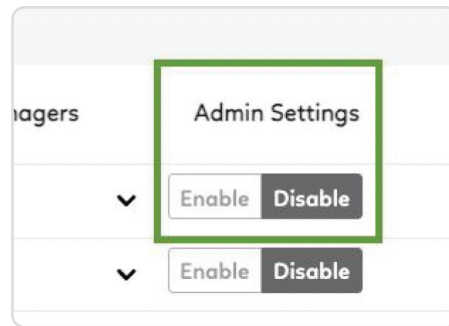
Note: The manager must also be an activated user in Prodoscore

The screenshot shows the 'Manager' dropdown menu. It has two rows of buttons: 'None', 'Other Managers', 'Admin Settings', and 'Visibility' for the first row, and 'None', 'Other Managers', 'Admin Settings', and 'Visibility' for the second row. The 'None' button in the first row is highlighted.

9 Enable / Disable **Admin Settings**

Enabling this will allow the user to make org settings changes, add or delete users, etc.

We recommend having only a couple of users with Admin Settings Enabled.

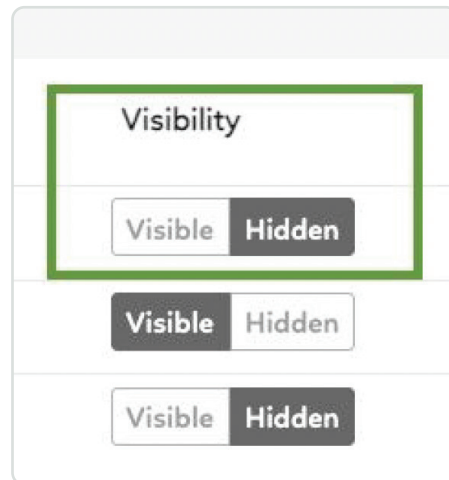


The screenshot shows a table with two rows of users. The first row is partially visible with the name 'agers'. The second row has a dropdown arrow and 'Enable'/'Disable' buttons. The third row also has a dropdown arrow and 'Enable'/'Disable' buttons. A green box highlights the 'Admin Settings' header and the 'Enable'/'Disable' buttons for both rows.

10 Change **Visibility** to Visible or Hidden.

Visible - the user's score and data will be captured and appear in the platform to users who have access to see it.

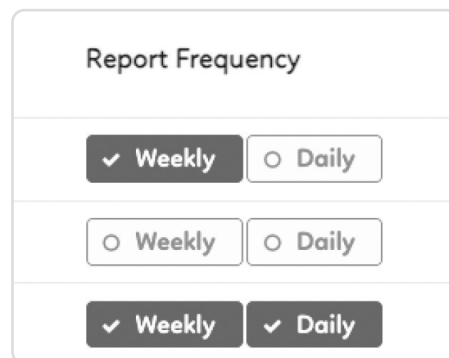
Hidden - allows the user to see their team/ company scores without having their score captured. *(Example: A CEO who wants to view the data, but doesn't want their score to contribute to overall scores.)*



The screenshot shows a table with three rows of users. The first row has a green box around the 'Visibility' header and the 'Visible'/'Hidden' buttons. The second row has 'Visible'/'Hidden' buttons. The third row has 'Visible'/'Hidden' buttons.

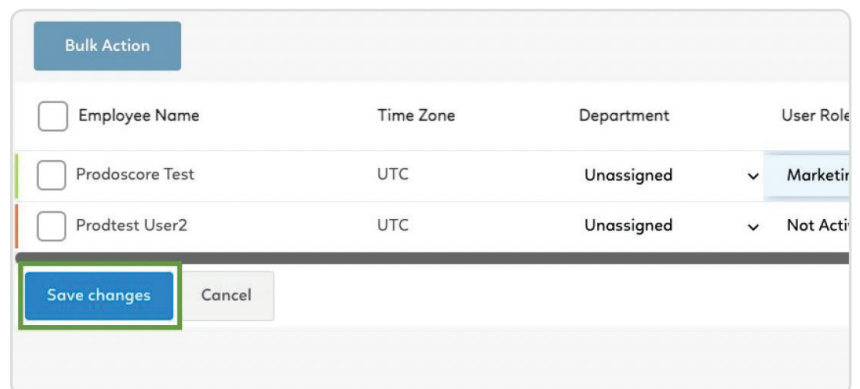
11 Enable **Report Frequency** or leave disabled.

This will send an email either Weekly or Daily to the user with their Prodoscope overview



The screenshot shows a table with three rows of users. The first row has 'Weekly' (checked) and 'Daily' (unchecked) buttons. The second row has 'Weekly' (unchecked) and 'Daily' (unchecked) buttons. The third row has 'Weekly' (checked) and 'Daily' (checked) buttons.

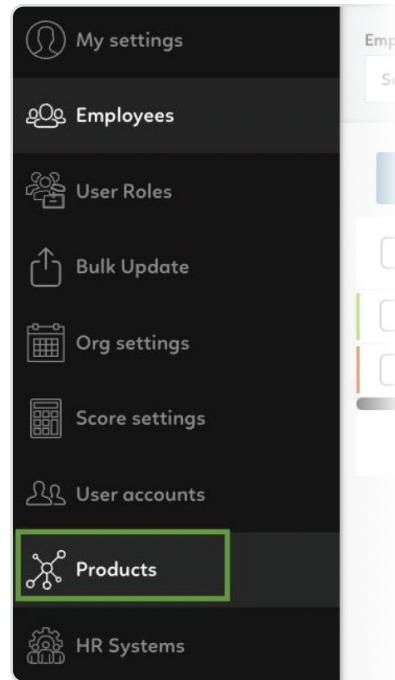
12 Click **Save Changes**



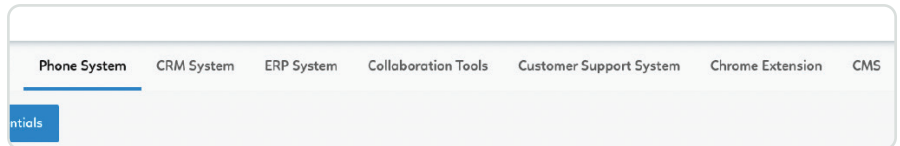
The screenshot shows a table with columns: Employee Name, Time Zone, Department, and User Role. The first row is 'Prodoscope Test' with Time Zone 'UTC', Department 'Unassigned', and User Role 'Marketing'. The second row is 'Prodtest User2' with Time Zone 'UTC', Department 'Unassigned', and User Role 'Not Active'. A green box highlights the 'Save changes' button at the bottom left of the table.

PART 2: MAP USER(S) TO PRODUCTS

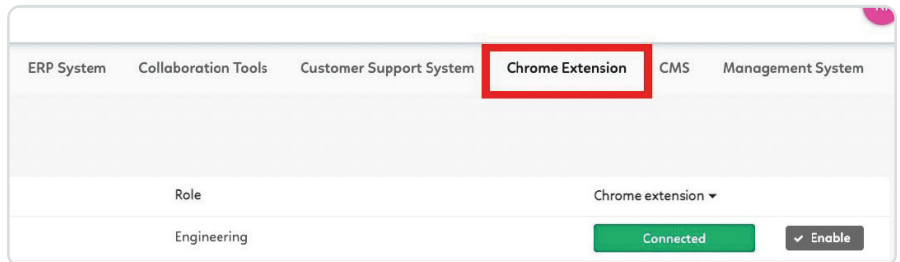
- 1 Click **Products** in the Settings Menu



- 2 You'll have a list of Products at the top of the screen.



CAUTION: ENABLING CHROME OR SLACK WILL NOTIFY THE EMPLOYEE OF PRODOSCORE



- 3 Click on the product you'd like to map the user to.

If the user has a license for the product, their email address or phone number will show up in **RED** font and a blue background.

Click **Save Changes** at the bottom to map the user to that product.

Jake Berman	Sales	85007552031 - (jake.b@prodoscore.com)
Jamie Parker	Customer Support	541850030 - (jamie.p@prodoscore.com)
Jayashan Chamika	QA	None
Jesse Slater	Customer Support	178702030 - (jesse@prodoscore.com)
Josh Potter	Marketing	None

CAUTION - Anyone in red will be mapped once you hit save. If you don't want to map everyone in red, simply click "none" before saving.

TROUBLESHOOTING - If it says **None** - they might not have a license for that product. If you're sure they have a license, click on none and type in their name. If they have a license, it should appear.

Note: Anyone with a recent name change might still have their old name associated with that account.