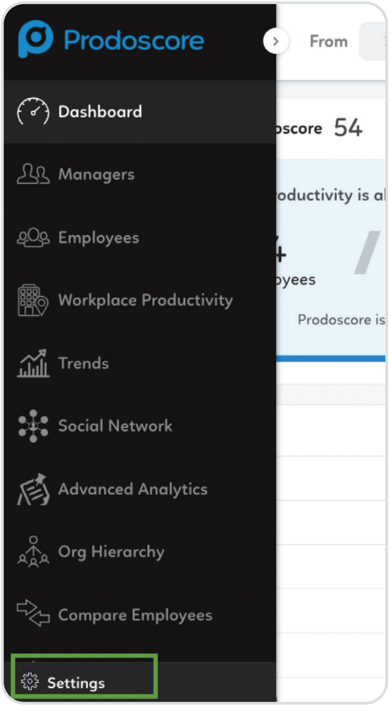
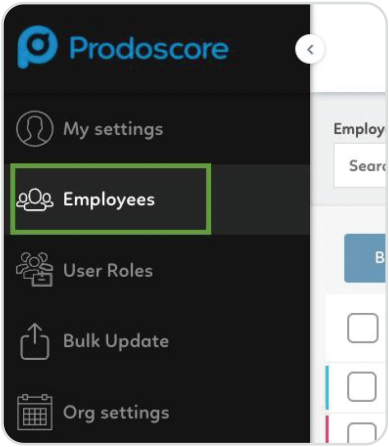
PART 1: Assign a Role

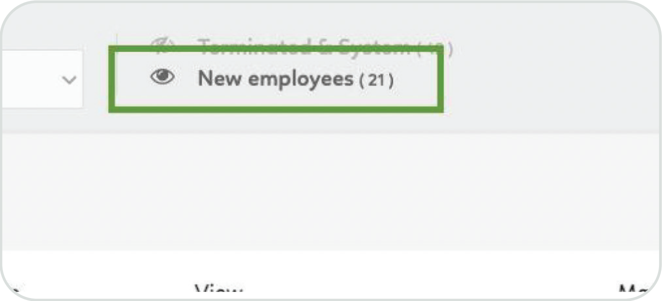
1 Go to **Settings** in the left menu



2 Click **Employees**

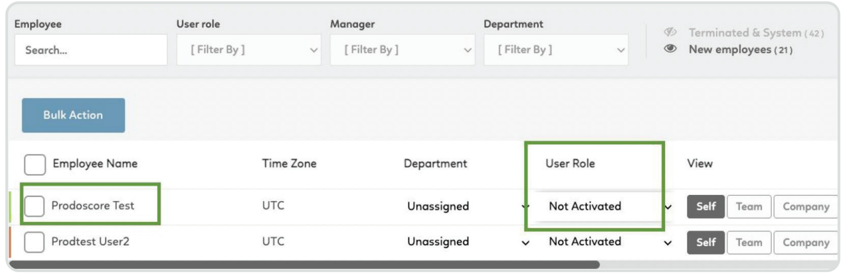


3 Click **New Employees** on the upper right

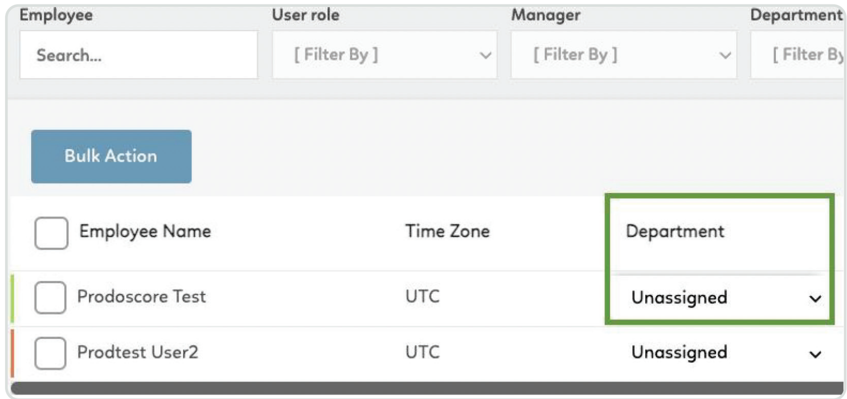


4 Find the employee you'd like to add.
Choose a **User Role** for them from the dropdown list.

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



6 Choose a **Department** from the dropdown list

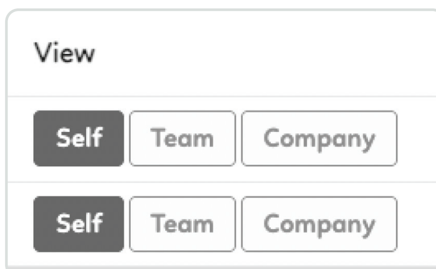


7 Assign their **View**

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.

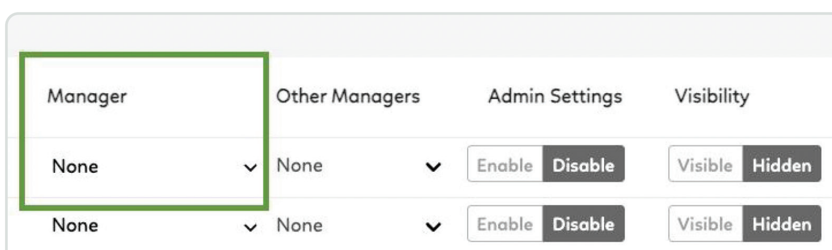
Company - They will see company-wide data and scores



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.

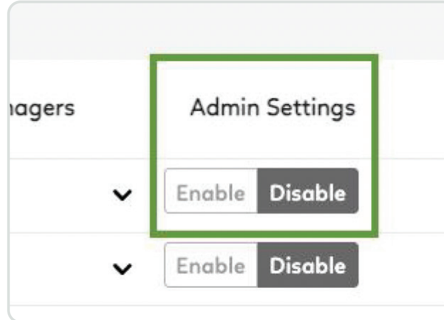
Note: The manager must also be an activated user in Prodoscore



9 Enable / Disable **Admin Settings**

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

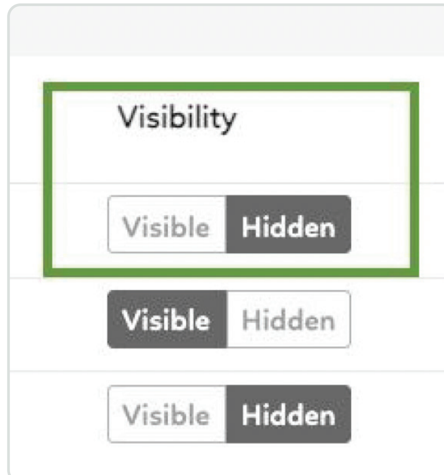
We recommend having only a couple of users with Admin Settings Enabled.



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

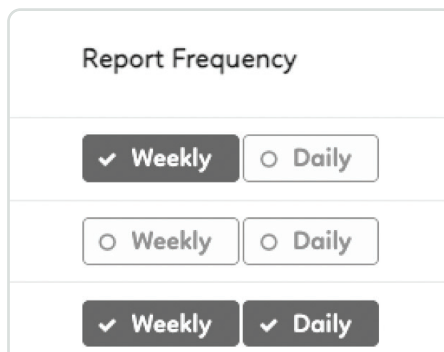
Visible - the user's score and data will be captured and appear in the platform to users who have access to see it.

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.)*

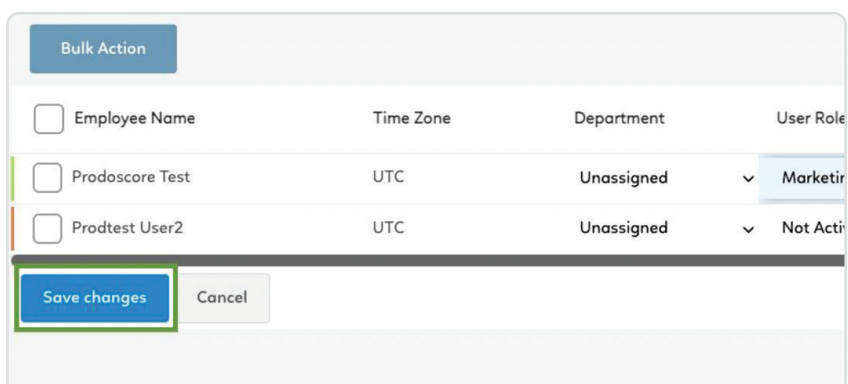


11 Enable **Report Frequency** or leave disabled.

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

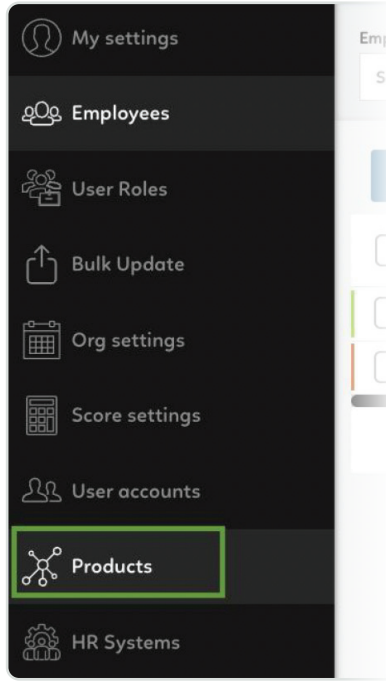


12 Click **Save Changes**

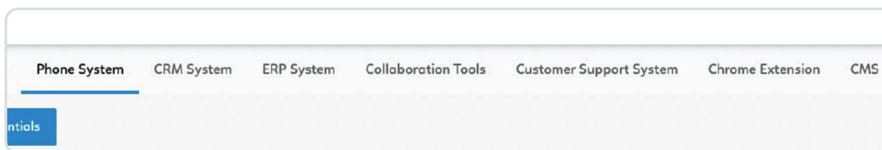


PART 2: MAP USER(S) TO PRODUCTS

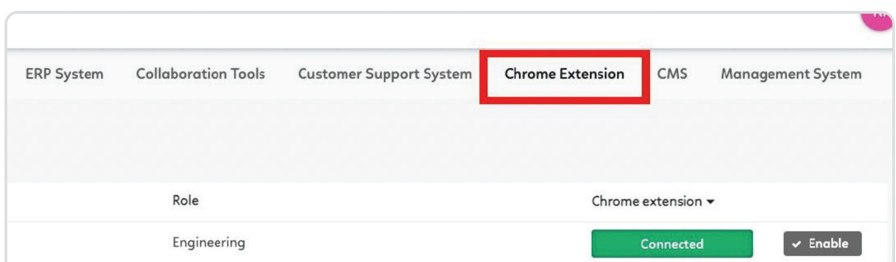
1. Click **Products** in the Settings Menu



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



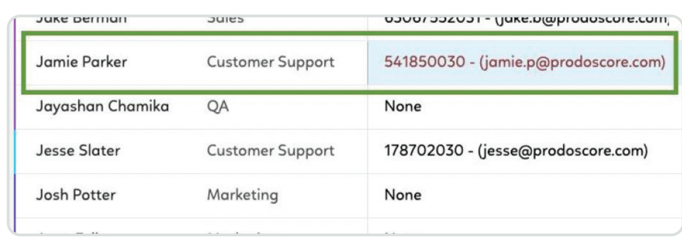
CAUTION: ENABLING CHROME OR SLACK WILL NOTIFY THE EMPLOYEE OF PRODOSCORE



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.



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.*