

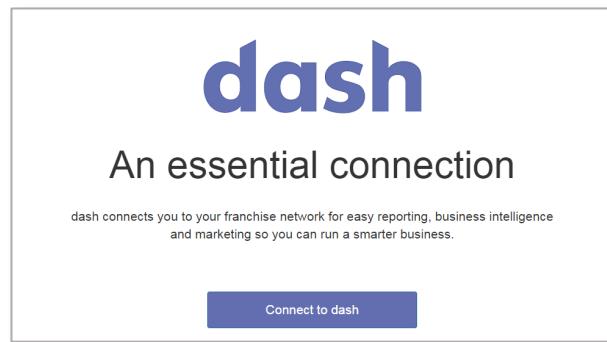
Assigning iProspect Access in dash

To access iProspect, a user will first need to be assigned the appropriate Security Role from within dash. Follow the steps below to edit that access.

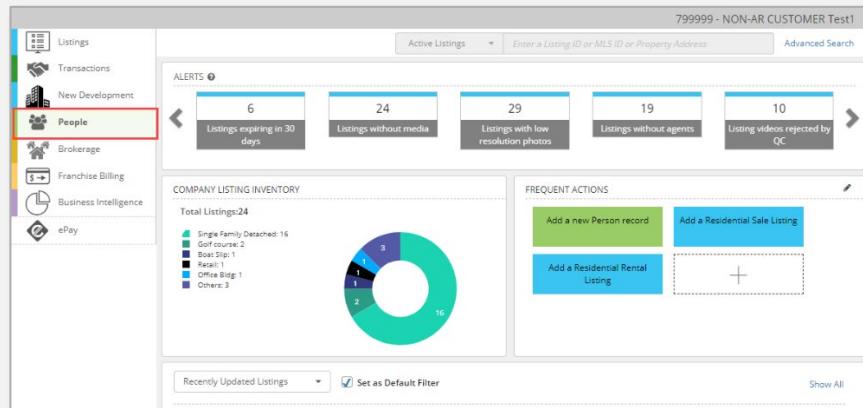
There are 3 Security Roles available for iProspect:

- **Executive:** This user doesn't typically do recruiting on their own, but a) coaches those who do and/or b) would want access to overall reporting of a company's activities and affiliations. This user will not be able to search agents, they will only see their team's pipeline(s). If the Executive also wants to see agents, they will additionally need the Recruiter Role assigned to them.
- **Recruiter:** This user does their own searches and enters their own activities. They will see only their own prospects and activities on the dashboard, but can see the activities of all recruiters in their office from the various iProspect reports.
- **Delegate:** This user works on behalf of a Recruiter or Executive entering activity details or searches provided to them. The recruiter or executive will also need to designate the user as a delegate in iProspect. To learn more about working as a delegate, please review the following job aids in the iProspect Help section: Assign a Delegate and Work as a Delegate.

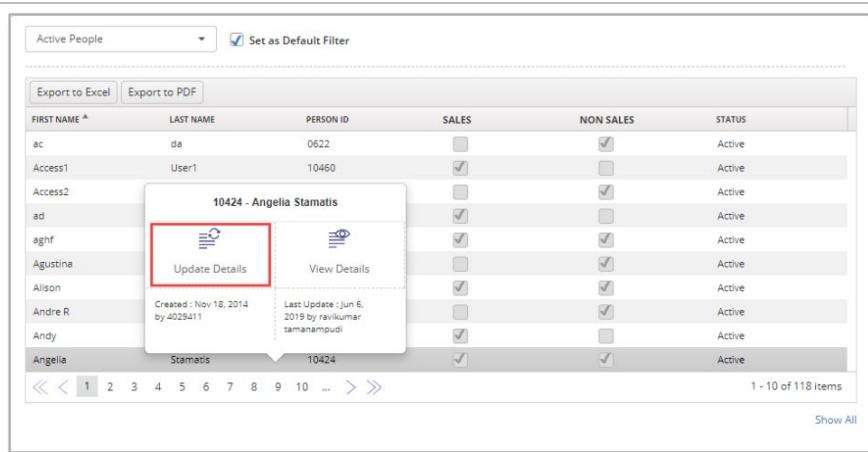
1. Log into dash.



2. Access the **People** home page.

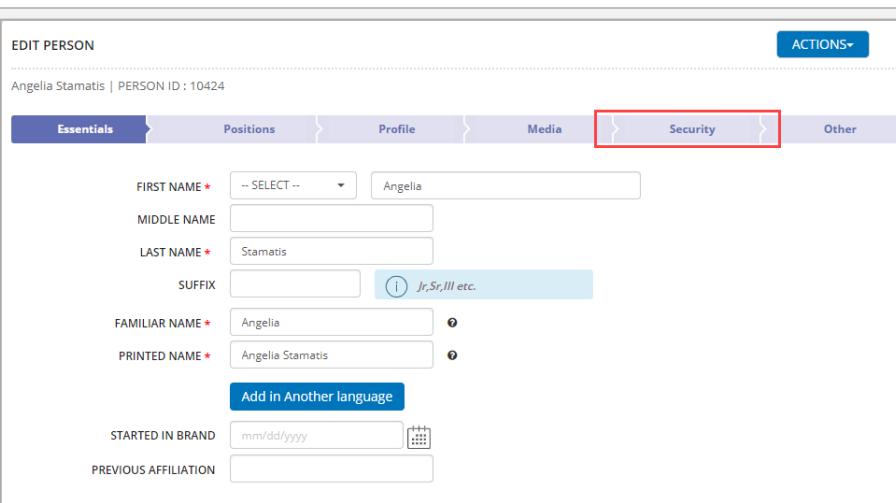


3. Locate the record for the person you wish to edit. Click on the record and select **Update Details**.



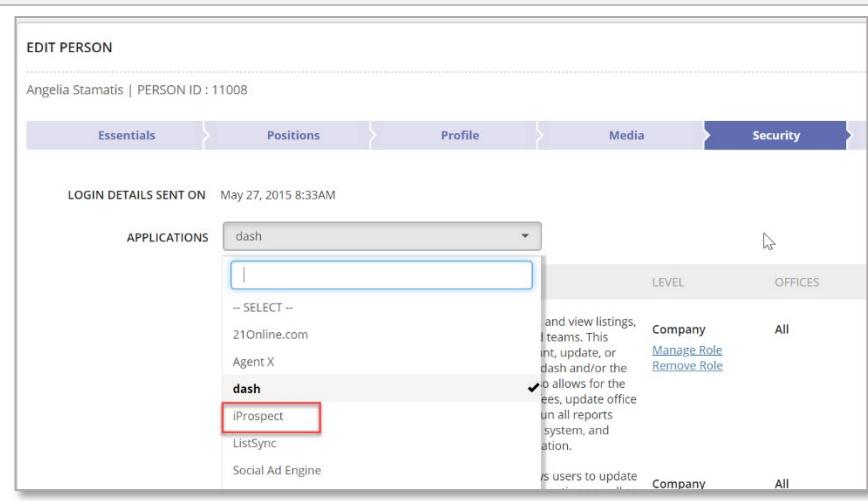
The screenshot shows a list of people with various filters and export options at the top. A context menu is open over a record for '10424 - Angelia Stamatis'. The 'Update Details' option is highlighted with a red box. The menu also includes 'View Details' and other options. Below the list, a pagination bar shows pages 1-10 of 118 items, and a 'Show All' link.

4. Select the **Security** tab.



The screenshot shows the 'Edit Person' page for 'Angelia Stamatis'. The 'Security' tab is highlighted with a red box. The page includes fields for first name, middle name, last name, suffix, familiar name, printed name, start date, and previous affiliation. Below the form is a 'Actions' button.

5. From the Applications menu, select **iProspect**.



The screenshot shows the 'Edit Person' page for 'Angelia Stamatis'. The 'Security' tab is selected. The 'APPLICATIONS' dropdown is open, showing 'dash' and 'iProspect' as options. 'iProspect' is highlighted with a red box. The page also shows a 'LOGIN DETAILS SENT ON' section and a detailed description of the 'iProspect' role.

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6. Once a role is assigned, that role will display an office in the last column. In this example a role has not yet been assigned.

EDIT PERSON

Angelia Stamatia | PERSON ID : 11008

ACTIONS+

LOGIN DETAILS SENT ON May 27, 2015 8:33AM

APPLICATIONS iProspect

ROLES	DESCRIPTION	LEVEL	OFFICES
Delegate	User that works on behalf of a Recruiter or Executive entering activity details or searches provided to them.	Manage Role	None
Executive	User who doesn't typically do recruiting on their own, but coaches those who do or someone who would want access to overall reporting of a company's activities and affiliations.	Manage Role	None
Recruiter	Active user that does their own searches and enters their own activities. They will see only their own activities.	Manage Role	None

Cancel Save

7. Click the **Manage Role** link.

EDIT PERSON

Angelia Stamatia | PERSON ID : 11008

ACTIONS+

LOGIN DETAILS SENT ON May 27, 2015 8:33AM

APPLICATIONS iProspect

ROLES	DESCRIPTION	LEVEL	OFFICES
Delegate	User that works on behalf of a Recruiter or Executive entering activity details or searches provided to them.	Manage Role	None
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Recruiter	Active user that does their own searches and enters their own activities. They will see only their own activities.	Manage Role	None

Cancel Save

8. If the security role should apply to all current and future offices, click **Entire Company**.

If the security role should apply to a certain office or offices, click **Select Offices** and then choose the appropriate office(s) in the Offices column.

Assign Security Role

ROLE: Delegate

Entire Company Automatically grants access to any office added in the Future

Select Offices

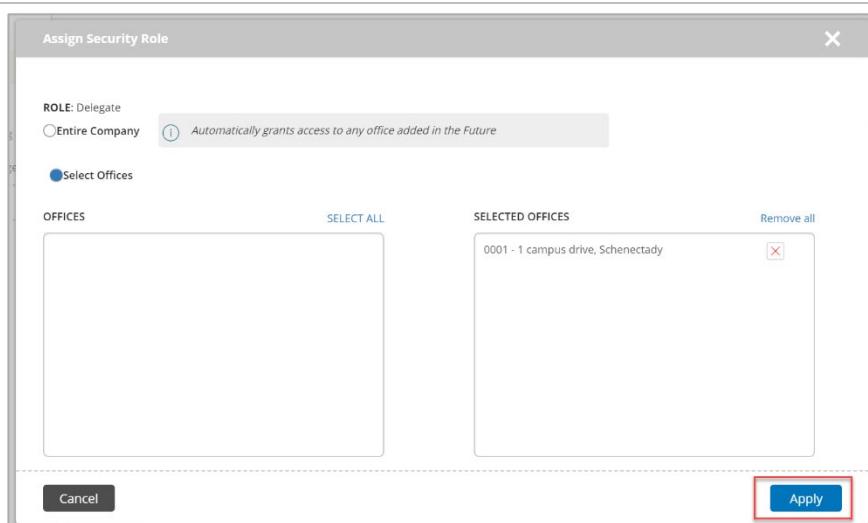
OFFICES SELECT ALL SELECTED OFFICES Remove all

0001 - 1 campus drive, Schenectady

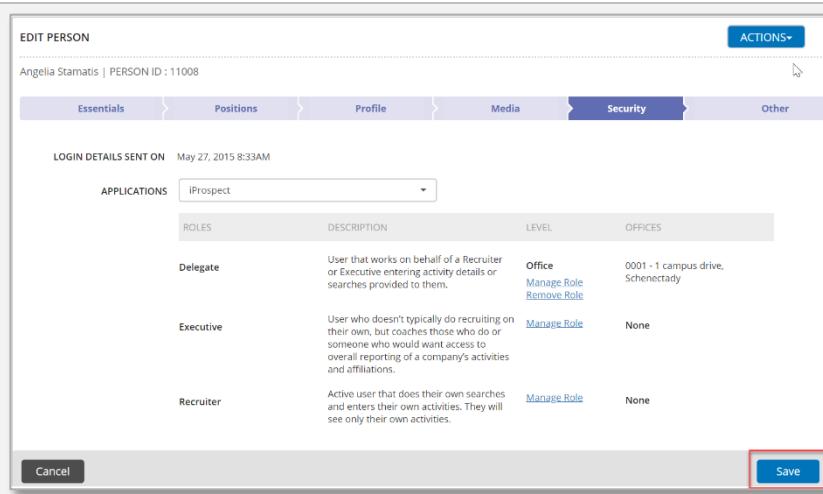
Cancel Apply

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9. Click **Apply** to confirm the selection.



10. Confirm that the correct role has an office name in the last column, and then click **Save**.



*Note: Once the user has been assigned the delegate role in dash, remember that in iProspect, they will now need to be given permission to work as a delegate for a particular Recruiter or Executive. See the job aid **Assigning a Delegate in iProspect** for details.*