

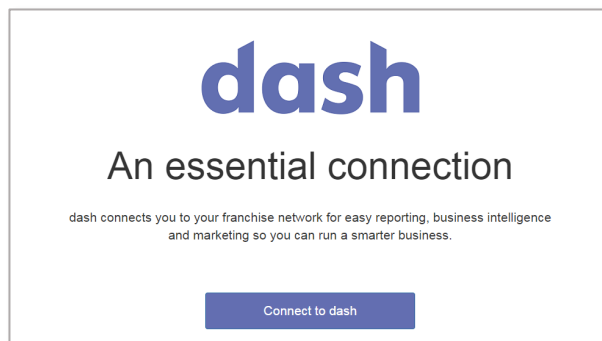
Assigning iProspect Access in dash

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.

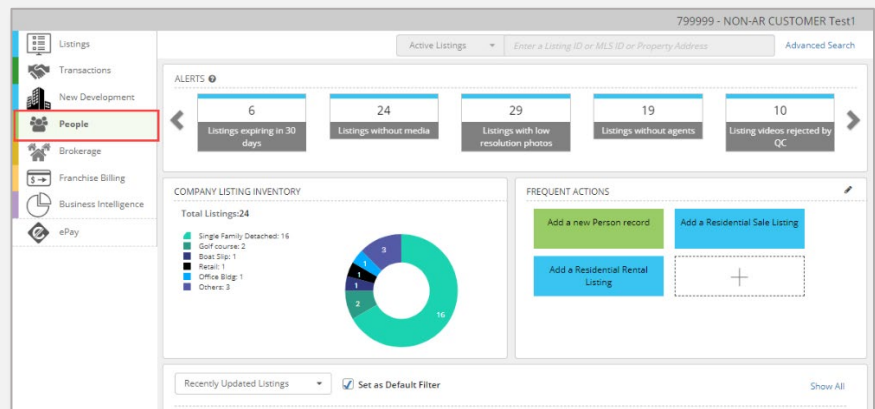
There are 3 Security Roles available for iProspect:

- **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**.

Active People ☒ Set as Default Filter

Export to Excel Export to PDF

FIRST NAME ^	LAST NAME	PERSON ID	SALES	NON SALES	STATUS
ac	da	0622	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Access1	User1	10460	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active
Access2			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
ad			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active
aghf			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Agustina			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Alison			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Andre R			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Andy			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active
Angelia	Stamatis	10424	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active

1 - 10 of 118 items

Show All

10424 - Angelia Stamatis

Update Details View Details

4. Select the **Security** tab.

EDIT PERSON

Angelia Stamatis | PERSON ID : 10424

Essentials Positions Profile Media **Security** Other

FIRST NAME * -- SELECT -- Angela

MIDDLE NAME

LAST NAME * Stamatis

SUFFIX *Jr, Sr, III etc.*

FAMILIAR NAME * Angela

PRINTED NAME * Angelia Stamatis

Add in Another language

STARTED IN BRAND mm/dd/yyyy

PREVIOUS AFFILIATION

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

EDIT PERSON

Angelia Stamatis | PERSON ID : 11008

Essentials Positions Profile Media **Security**

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

APPLICATIONS dash

-- SELECT --

21Online.com

Agent X

dash

iProspect

ListSync

Social Ad Engine

LEVEL OFFICES

Company All

Manage Role Remove Role

Company All

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 Stamatis | PERSON ID : 11008

Essentials Positions Profile Media **Security** Other

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 Stamatis | PERSON ID : 11008

Essentials Positions Profile Media **Security** Other

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

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*

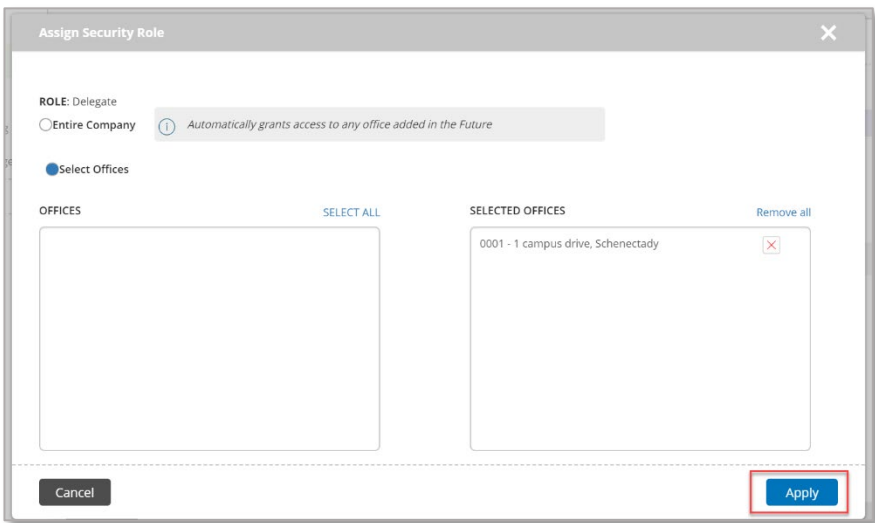
☒ Select Offices

OFFICES SELECT ALL SELECTED OFFICES Remove all

0001 - 1 campus drive, Schenectady

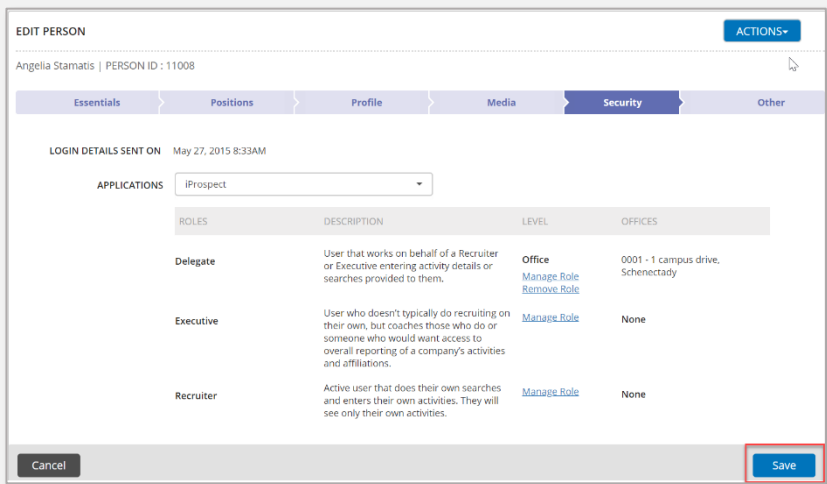
Cancel Apply

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



The 'Assign Security Role' dialog box shows the 'ROLE: Delegate' selected. Under 'Select Offices', the '0001 - 1 campus drive, Schenectady' office is listed in the 'SELECTED OFFICES' column. The 'Apply' button is highlighted with a red box.

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



The 'EDIT PERSON' page for 'Angelia Stamatidis' shows the 'Security' tab. The 'APPLICATIONS' dropdown is set to 'iProspect'. A table lists roles and their associated offices. The 'Delegate' role is assigned to the office '0001 - 1 campus drive, Schenectady'. The 'Save' button is highlighted with a red box.

ROLES	DESCRIPTION	LEVEL	OFFICES
Delegate	User that works on behalf of a recruiter or Executive entering activity details or searches provided to them.	Office Manage Role Remove Role	0001 - 1 campus drive, Schenectady
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

*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.*