

FAQ Top Admin Navigation



If you're wondering how to...	You're really trying to...	Start here (fast path)	Notes / gotchas
Change admin access	Change who can manage users/settings	Admin/Settings → Employee Access Settings → Select user → Product Access	If you can't see Roles/Permissions, you're likely not an admin—route to your PI admin.
Change my email domain	Update what domain users log in with (often tied to SSO)	Admin/Settings → Organization Settings → Organization Domains	You can also click Override Allowable Organization Domains if there is multiple
Add a third-party user	Give an external partner/coach access	Admin/Settings → Third Part Users → Click User Name	Use the least access needed.
Invite new users	Create software users who can log in	Admin/Settings → Employee Directory → Invite Uses	“Invite user” = platform access (not the assessment link). Consider role + team/group assignment.
Invite someone to take the PI assessment	Send the BA link (not platform access)	Admin/Settings → Employee Assessments	Assessment invite ≠ software login. They may complete an assessment without ever becoming a PI software user.