

Changing Persona Types

13 Steps [View most recent version](#) 

Created by
Engagifii Inc.

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STEP 3

Y

The screenshot shows the 'Members Detail' page for Mr. John Hamm. The breadcrumb trail is 'Home / Relationships / Members / Members Detail'. The member's name is 'Mr. John Hamm' with a pencil icon for editing. Below the name, the following information is displayed: 'PID: JHOW3197', 'Status: Active', 'Is Instructor: No', and 'Roles: 1 Role'. The 'Person Types' field is highlighted with an orange box and shows 'Member' with a pencil icon. Other fields include 'Total Time Worked: 10 yrs 2 mos' and 'Total Time Served in Committee:'. Below this is a 'Tag(s):' field with a plus icon. A navigation bar contains 'GENERAL DETAILS' (selected), 'ACCOUNTING DETAILS', 'EVENTS AND TRAINING', and 'ACTIVITY LOG'. The 'GENERAL DETAILS' section has sub-tabs for 'Basic Information', 'Committees', 'Associated Items', 'Library', and 'Committees'. The 'Contact Info' section shows the organization as 'Cobb County Schools' with a '10 yrs 2 mos' duration. The position is 'Board Member' with a 'Current' status, starting on 'Nov 02, 2023' and lasting '2 mos'. There is a link for 'Show All Past Positions'. The total time worked at this organization is '10 yrs 2 mos'. Contact information includes an email address 'johnhamm@cxsba.org' and a phone number '(444) 444-4444', both with 'Primary' labels.

STEP 4

Click on the pencil icon next to Person Types

This is a close-up view of the 'Person Types' field from the previous screenshot. The breadcrumb trail is 'Home / Relationships / Members / Members Detail'. The member's name 'Mr. John Hamm' is visible. The 'Person Types' field shows 'Member' with a blue pencil icon next to it, which is highlighted by a blue box. Other visible text includes 'PID: JHOW3197', 'Status: Active', 'Is Instructor: No', and 'Roles: 1 R'. The 'Total Time Worked' is '10 yrs 2 mos'. Below the field is a 'Tag(s):' field with a plus icon. The navigation bar shows 'GENERAL DETAILS' (selected), 'ACCOUNTING DETAILS', and 'EVENTS AND TRAINING'. The 'GENERAL DETAILS' section is partially visible at the bottom.

STEP 5


Uncheck the current type

GENERAL DETAILS

Basic Information Committees

Contact Info

Organization

Primary  Cobb County Schools (10 yrs 2 mos)

- Exhibitor
- Guest
- Instructor
- Member
- Board Member
- Non-Member
- Non-Member
- Public

Cancel

STEP 6


Check on the new Person Type you wish to use

GENERAL DETAILS

Basic Information Committees

Contact Info

Organization

Primary  Cobb County Schools (10 yrs 2 mos)

Department: School Board

Position: Board Member **Current**

Nov 02, 2022 - present, 2 mos

- Board Member
- Member
- Non-Member
- Non-Member
- Public
- Public
- Staff

Cancel

STEP 7

Click on Save

Member
Non-Member
Public
Staff

Cancel Save

10s)

STEP 8

View the pop up box with the implications of changing, if you are ok, click Proceed.

Home / Relationships / Members / Members Detail

Mr. John Ha
PID: JHOW31
Person Types
Tag(s):

GENERAL DETAILS

GENERAL DETAILS

Basic Information Committees Associated Items Library Committees

Contact Info

Organization

Cobb County Schools (10 yrs 2 mos)
Department: School Board
Position: Board Member Current
Nov 02, 2023 - present - 2 mos

Show All Past Positions

Total time worked at this Organization: 10 yrs 2 mos

Changing Person Type from Member Persona to Staff Persona

Changing from one Persona to another may change which fields are available on this person's record.
But don't worry. No data is being lost. If you reverse this change later, the existing data in any hidden fields will be available again.
Are you sure you wish to proceed?

Cancel Proceed

STEP 9

Now you can see the updated Person Type is has been changed.

Home / Relationships / Staff / Staff Detail

Mr. John Hamm

PID: JHOW3197 Status: Active Is Instructor: No Roles: 1 Role

Person Types: Staff Total Time Worked: 10 yrs 2 mos Total Time Served in Committee:

Tag(s): +

GENERAL DETAILS ACCOUNTING DETAILS EVENTS AND TRAINING ACTIVITY LOG

GENERAL DETAILS

Basic Information Committees Associated Items Library Committees

Contact Info

Organization

Cobb County Schools (10 yrs 2 mos)

Department: School Board

Position: Board Member Current

Nov 02, 2023 - present- 2 mos

[Show All Past Positions](#)

Total time worked at this Organization: 10 yrs 2 mos

Email Address Primary johnhamm@cxsba.org

Phone Number Primary (444) 444-4444

STEP 10

Click on the pencil icon next to the Role to update role (permissions)

Detail

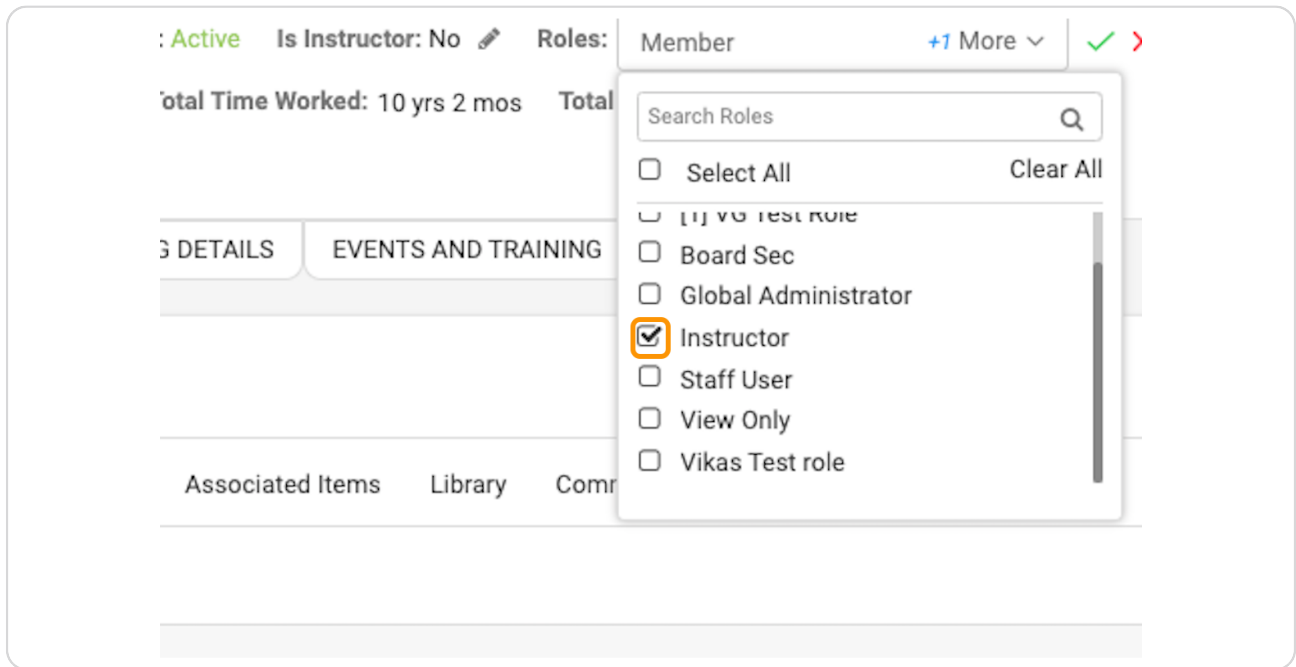
ve Is Instructor: No Roles: 1 Role

Time Worked: 10 yrs 2 mos Total Time Served in Committee:

DETAILS EVENTS AND TRAINING ACTIVITY LOG

STEP 11

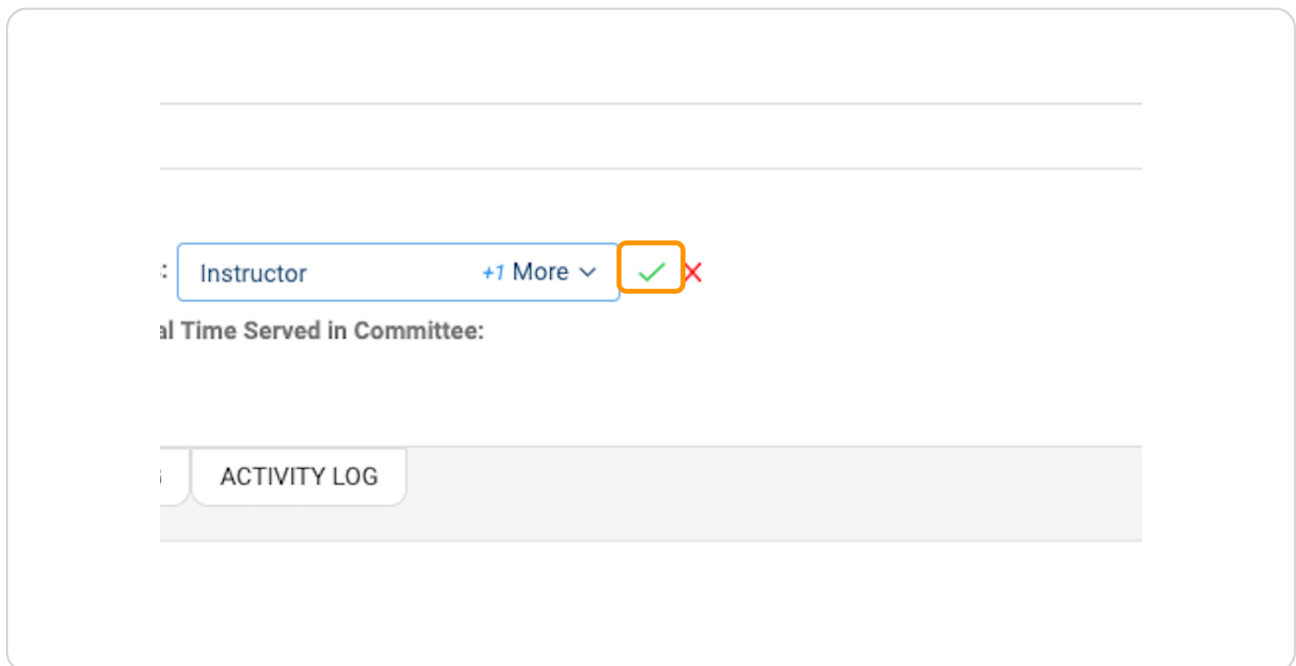
Check new role(s) you wish to add to this user



The screenshot shows a user profile interface. At the top, it displays the user's status as 'Active', 'Is Instructor: No', and 'Roles: Member'. There is a '+1 More' dropdown and a green checkmark icon. Below this, it shows 'Total Time Worked: 10 yrs 2 mos' and 'Total'. A dropdown menu is open, listing various roles: 'Select All', 'Clear All', 'Vikas Test role', 'Board Sec', 'Global Administrator', 'Instructor' (which is selected with a checkmark), 'Staff User', 'View Only', and 'Vikas Test role'. The background shows tabs for 'DETAILS' and 'EVENTS AND TRAINING', and a section for 'Associated Items' with sub-sections 'Library' and 'Comr'.

STEP 12

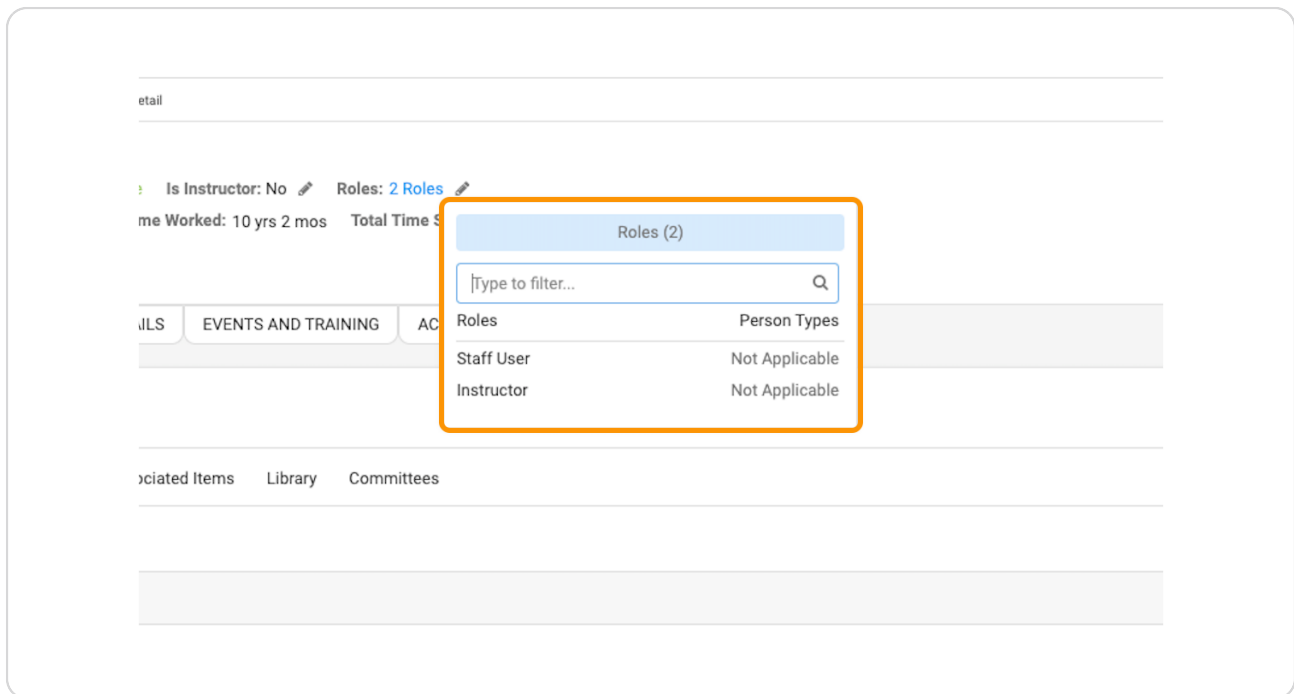
Click on the green check mark when finished with selections.



The screenshot shows the user profile page after the role selection. The 'Roles' field now displays 'Instructor' with a '+1 More' dropdown and a green checkmark icon highlighted with a red box. Below this, it shows 'Total Time Served in Committee:'. At the bottom, there is a tab for 'ACTIVITY LOG'.

STEP 13

Click on Roles to view the associated Roles



The screenshot shows a user profile page with a dropdown menu open for 'Roles'. The dropdown menu is titled 'Roles (2)' and contains a search bar with the placeholder text 'Type to filter...' and a magnifying glass icon. Below the search bar, there are three rows of data:

Roles	Person Types
Staff User	Not Applicable
Instructor	Not Applicable

The background of the page shows a user profile with the following information:

- etail
- Is Instructor: No
- Roles: 2 Roles
- Time Worked: 10 yrs 2 mos
- Total Time S

At the bottom of the page, there are links for 'Associated Items', 'Library', and 'Committees'.

