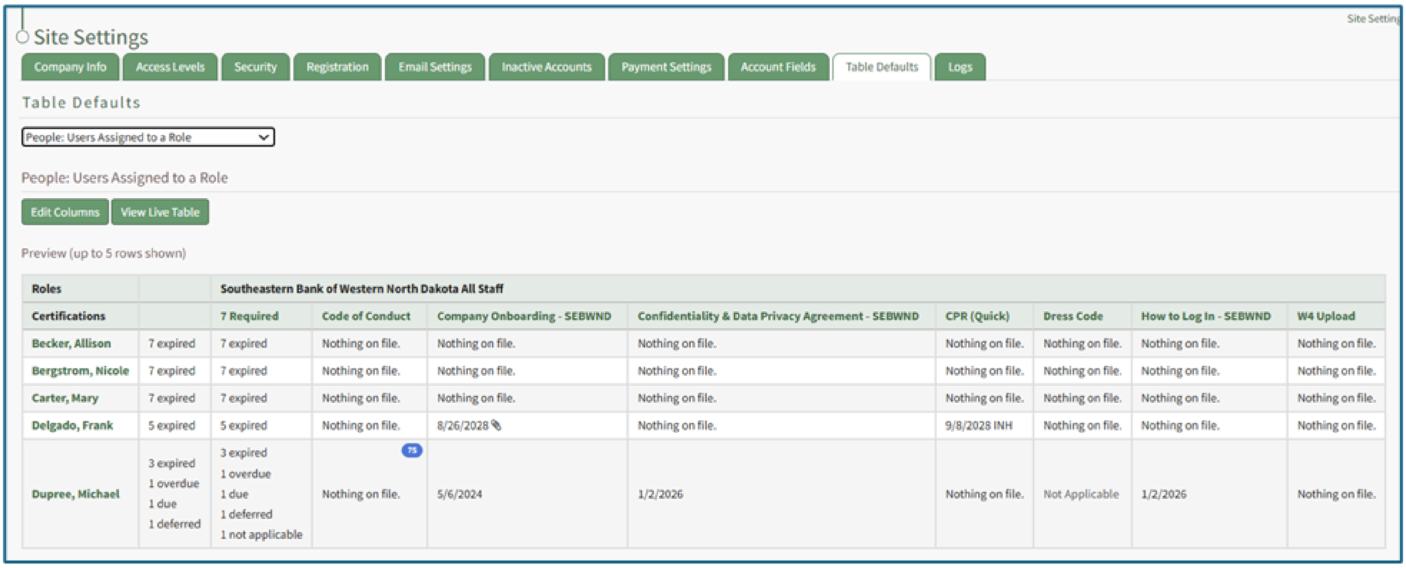
Edit the People Module Users Assigned to a Role Table

To edit the Users Assigned to a Role Table in the People Module, go to the Table Defaults Tab in the Site Settings Module.

Select “People: Users Assigned to a Role” from the dropdown menu.



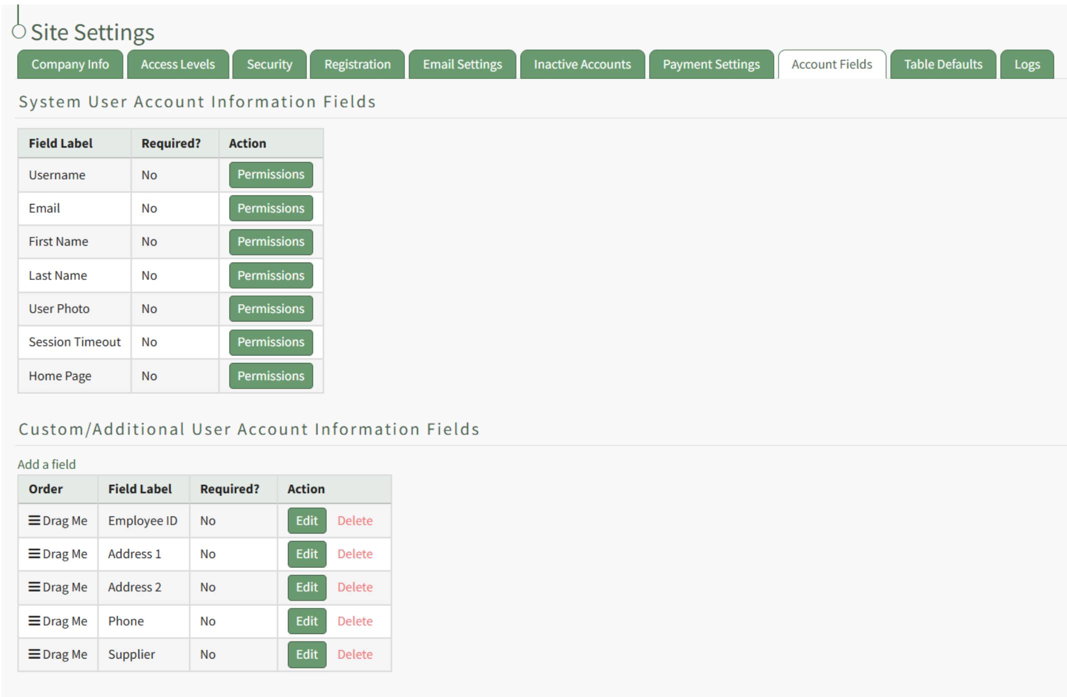
Roles		Southeastern Bank of Western North Dakota All Staff							
Certifications		7 Required	Code of Conduct	Company Onboarding - SEBWND	Confidentiality & Data Privacy Agreement - SEBWND	CPR (Quick)	Dress Code	How to Log In - SEBWND	W4 Upload
Becker, Allison	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.
Bergstrom, Nicole	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.
Carter, Mary	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.
Delgado, Frank	5 expired	5 expired	Nothing on file.	8/26/2028	Nothing on file.	9/8/2028 INH	Nothing on file.	Nothing on file.	Nothing on file.
Dupree, Michael	3 expired 1 overdue 1 due 1 deferred	3 expired 1 overdue 1 due 1 deferred 1 not applicable	Nothing on file.	5/6/2024	1/2/2026	Nothing on file.	Not Applicable	1/2/2026	Nothing on file.

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include name, username, email, first name, last name, employee ID, phone, Address 1, and Address 2.

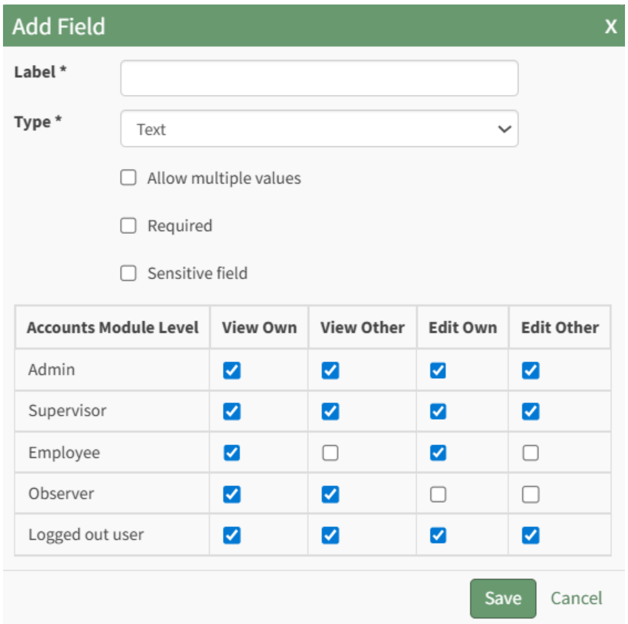
Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.



Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.



Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

> Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click “Cancel” to return to the Table Defaults Tab without making any changes.

Select the “Save” button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the “View Live Table” button to be directed to the live table in the People Module.

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