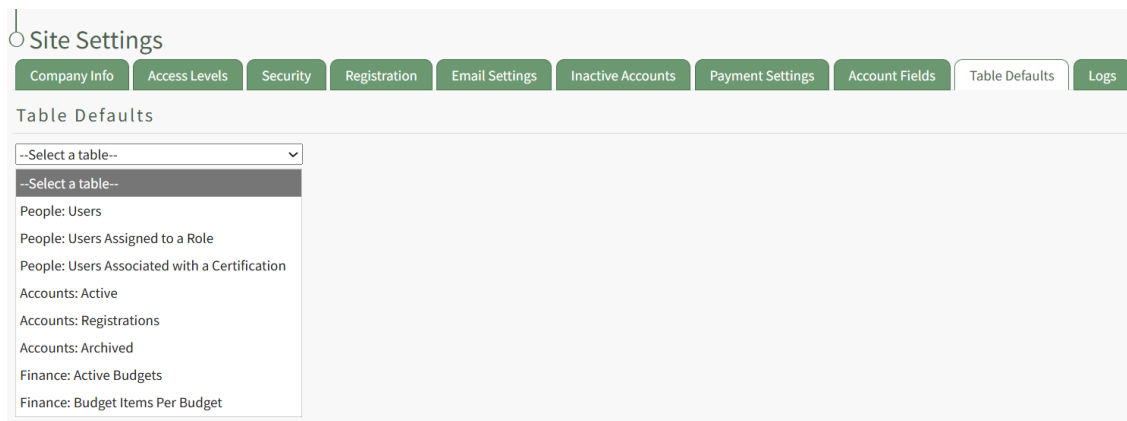


Customizable Tables in the People Module

There are three tables in the People Module than can be customized for your organization's specific needs.



The Users Table (on the Users Page of the People Module), the Users Assigned to a Role Table (on the Assigned Users Tab of a certification role's Details Page), and the Users Associated with a Certification Table (on the Associated Users Tab of a certification's Details Page) are all customizable.

How To: Edit the People Module Users Table

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

Select "People: Users" from the dropdown menu.

Table Defaults

People: Users

People: Users

Edit Columns View Live Table

Preview (up to 5 rows shown)

| Users | Certifications | Reports |
|-----------------------|----------------|---------|
| Becker, Allison *** | Print Report | Visible |
| Bergstrom, Nicole *** | Print Report | Visible |
| Carter, Mary *** | Print Report | Visible |
| Delgado, Frank *** | Print Report | Visible |
| Dupree, Michael *** | Print Report | Visible |

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include users, certifications, reports, 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.

Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

System User Account Information Fields

| Field Label | Required? | Action |
|-----------------|-----------|-------------|
| Username | No | Permissions |
| Email | No | Permissions |
| First Name | No | Permissions |
| Last Name | No | Permissions |
| User Photo | No | Permissions |
| Session Timeout | No | Permissions |
| Home Page | No | Permissions |

Custom/Additional User Account Information Fields

Add a field

| Order | Field Label | Required? | Action |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No | Edit Delete |
| ≡ Drag Me | Address 1 | No | Edit Delete |
| ≡ Drag Me | Address 2 | No | Edit Delete |
| ≡ Drag Me | Phone | No | Edit Delete |
| ≡ Drag Me | Supplier | No | Edit Delete |

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

Add Field X

Label *

Type *

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own | View Other | Edit Own | Edit Other |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Observer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Logged out user | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

How To: 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.

The screenshot shows the 'Site Settings' interface with the 'Table Defaults' tab selected. A dropdown menu is open, showing 'People: Users Assigned to a Role'. Below the dropdown are buttons for 'Edit Columns' and 'View Live Table'. A preview of the table is shown below, with the following data:

| 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.

The screenshot shows the 'Site Settings' interface with the 'Account Fields' tab selected. It is divided into two sections: 'System User Account Information Fields' and 'Custom/Additional User Account Information Fields'.

System User Account Information Fields

| Field Label | Required? | Action |
|-----------------|-----------|-------------|
| Username | No | Permissions |
| Email | No | Permissions |
| First Name | No | Permissions |
| Last Name | No | Permissions |
| User Photo | No | Permissions |
| Session Timeout | No | Permissions |
| Home Page | No | Permissions |

Custom/Additional User Account Information Fields

Add a field

| Order | Field Label | Required? | Action |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No | Edit Delete |
| ≡ Drag Me | Address 1 | No | Edit Delete |
| ≡ Drag Me | Address 2 | No | Edit Delete |
| ≡ Drag Me | Phone | No | Edit Delete |
| ≡ Drag Me | Supplier | No | Edit Delete |

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

Add Field
X

Label *

Type *

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own | View Other | Edit Own | Edit Other |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Observer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Logged out user | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

How To: Edit the People Module Users Associated with a Certification Table

To edit the Users Associated with a Certification Table in the People Module, go to the Table Defaults Tab in the Site Settings Module.

Select “People: Users Associated with a Certification” from the dropdown menu.

Table Defaults

People: Users Associated with a Certification

People: Users Associated with a Certification

Edit Columns View Live Table

Preview (up to 5 rows shown)

| <input type="checkbox"/> | Name | Certification Expiration Date | Attachment(s) | Time Until Expiration | Required |
|--------------------------|-------------------|-------------------------------|---------------|-----------------------|---|
| <input type="checkbox"/> | Becker, Allison | Nothing on file | | -- | Southeastern Bank of Western North Dakota All Staff |
| <input type="checkbox"/> | Bergstrom, Nicole | Nothing on file | | -- | Southeastern Bank of Western North Dakota All Staff |
| <input type="checkbox"/> | Carter, Mary | Nothing on file | | -- | Southeastern Bank of Western North Dakota All Staff |
| <input type="checkbox"/> | Delgado, Frank | 9/8/2028 INH | | 2 years, 11 months | Southeastern Bank of Western North Dakota All Staff |
| <input type="checkbox"/> | Dupree, Michael | Nothing on file | | -- | Southeastern Bank of Western North Dakota All Staff |

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, certification expiration date, attachment(s), time until expiration, required, other required certification, 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.

Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

System User Account Information Fields

| Field Label | Required? | Action |
|-----------------|-----------|-------------|
| Username | No | Permissions |
| Email | No | Permissions |
| First Name | No | Permissions |
| Last Name | No | Permissions |
| User Photo | No | Permissions |
| Session Timeout | No | Permissions |
| Home Page | No | Permissions |

Custom/Additional User Account Information Fields

Add a field

| Order | Field Label | Required? | Action |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No | Edit Delete |
| ≡ Drag Me | Address 1 | No | Edit Delete |
| ≡ Drag Me | Address 2 | No | Edit Delete |
| ≡ Drag Me | Phone | No | Edit Delete |
| ≡ Drag Me | Supplier | No | Edit Delete |

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

Add Field X

Label *

Type *

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own | View Other | Edit Own | Edit Other |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Observer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Logged out user | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

Customizable user account information fields can be created and utilized in the tables as needed.

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.

The screenshot shows the 'Site Settings' interface with the 'Account Fields' tab selected. It displays two tables: 'System User Account Information Fields' and 'Custom/Additional User Account Information Fields'.

System User Account Information Fields

| Field Label | Required? | Action |
|-----------------|-----------|-------------|
| Username | No | Permissions |
| Email | No | Permissions |
| First Name | No | Permissions |
| Last Name | No | Permissions |
| User Photo | No | Permissions |
| Session Timeout | No | Permissions |
| Home Page | No | Permissions |

Custom/Additional User Account Information Fields

Add a field

| Order | Field Label | Required? | Action |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No | Edit Delete |
| ≡ Drag Me | Address 1 | No | Edit Delete |
| ≡ Drag Me | Address 2 | No | Edit Delete |
| ≡ Drag Me | Phone | No | Edit Delete |
| ≡ Drag Me | Supplier | No | Edit Delete |

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

Add Field X

Label *

Type *

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own | View Other | Edit Own | Edit Other |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Observer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Logged out user | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

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