

People

The people library will play a role in every event as the repository for user profile information and for controlling access to the platform. The videos below break down the different parts of this library in the order they appear in the CMS and provide best practices on how to use them for your event.

Users have controls at login to choose if they would like to be visible in the platform and to update their profile.

People List

This is where user profiles can be created and edited, with the email address being a unique identifier that must be different for every user. When a platform is set to secure, this is also the master list against which the email address of any user attempting to login is cross-checked. If the user's email is not recognised they will receive this message:

You do not have access to this application. If you believe this to be a mistake, please contact your representative.

This still applies for users who have backend access to the CMS and so one of the first steps of any build should be to add yourself and any other members of your team who intend to work on/use the platform, so that you are able to login to the frontend.

People Groups

Creating and allocating users to groups allows you to personalise what they can see on the home page, menu and in the agenda. You can also send targeted comms to specific groups.

People Tags

People Fields & Custom Fields

Import People

The "Import People" function enables the bulk import of users and profile data via spreadsheet upload.

Using "Import People" for Bulk Uploads or Edits

Import People Groups

The "Import People Groups" function uses a different spreadsheet and enables you to change the groupings users belong to in bulk, however users must have already been added to the platforms manually or using the above import.

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