

Manage Persons

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[How to create and manage persons in Holocentric Connect](#)

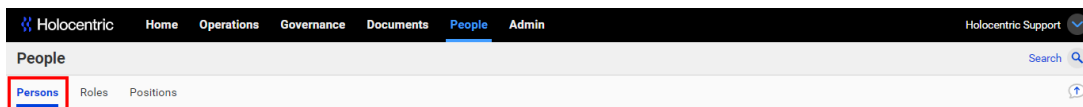
Persons are people who are associated with your organisation but are not users of Connect. A Person can be associated with a Position within your organization.

This article includes the following topics:

1. Create a new person
2. Edit person
3. Approve and publish a person

1. Create a Person

1.1 Go to the **People** tab and access the **Person** subtab.



1.2 Click **Add New Person**.

1.3 A release management workflow appears. Click **OK** to start adding a person.

Editing a new Person



A draft will be created for editing. It will only be viewable by editors and admin.

When all editing is finished, it will no longer be editable and will be marked for approval. After approval it can be published. When published it will be viewable to users with 'View' permission.

OK

1.4 Enter information about the person and click **Save** when done.

People > Persons

Add a person who is not a user of this web app

PERSON DETAILS

Name:

Email address:

Contact number:

External reference identifier:

Notes:

VIEWING & SEARCH

Keywords for 'Search':

Remove from view: Hide this item from being viewed, listed, browsed, edited and searched for

Buttons: Cancel, Save

Field	Description
Name	Full Name of this person
Email address	Person's contact email address
Contact number	Any mobile or phone number
External reference identifier	An optional identifier for this person
Notes	Notes about this person in relation to this organisation
Keywords for 'Search'	Keywords that, when searched in Holocentric Connect, will make the item appear in search results.
Remove from view	<p>Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items are:</p> <ul style="list-style-type: none"> • not shown in lists • not shown as a related item on any other items. • not accessible by URL (will show item not found message) • not shown in any downloadable report.

2. Edit Person

2.1 Click on the person you wish to edit and click **Open** .

People Search

Persons Roles Positions

List of 'Persons' relevant to this organisation, who are not Users of this web app

Buttons: Delete, Download, Open, Add New Person

Person name: filter list to text entered here

Email address: filter list to text entered here

Status: Published + unpublished

Table Row: Harry Potter Published

2.2 Click **Start Editing**, a release management workflow will appear. If the person is already marked 'Awaiting Approval' or 'Ready to Publish', open the person and revert to a draft so you can edit it.

The screenshot shows the 'People > Persons' page for 'Harry Potter'. The status is 'Draft'. A 'Start Editing' button is highlighted with a red box. Below the name, there is a 'Notes' field.

2.3 Click **OK**. This will mark the person as 'Draft'.

2.4 Click **Edit**

The screenshot shows the 'Harry Potter Draft v2' person record. The status is 'Draft v2'. A 'Finish All Editing' button is visible in the top right. Below the name, there is a 'Notes' field and an 'Edit' button highlighted with a red box.

2.5 Make the necessary changes using the edit interface and click **Save** to commit the changes.

The screenshot shows the 'Harry Potter Draft v2' person record in edit mode. The 'Finish All Editing' button is visible in the top right. The 'PERSON DETAILS' section includes fields for Name (Harry Potter), Email address (harrypotter@bmsnext.com), Contact number, External reference identifier, and Notes. The 'VIEWING & SEARCH' section includes a 'Keywords for Search' field and a 'Remove from view' checkbox. A 'Save' button is highlighted with a red box.


3. Approve and Publish Person

3.1 Open the draft person. Click **Finish All Editing**.

The screenshot shows the 'Harry Potter Draft v2' person record. The status is 'Draft v2'. A 'Finish All Editing' button is highlighted with a red box. Below the name, there is an 'Email address' field (harrypotter@bmsnext.com) and a 'Notes' field.

3.2 A release management workflow appears. Write a summary of what was added and click **Finish All Editing**. The new person is now ready to be approved.

Finish all Editing for this Person



Start Editing Finish All Editing Approve Publish

This item will no longer be editable and will be set to 'Awaiting Approval'

Summary of what was changed:

[Cancel](#) [Finish All Editing](#)

3.3 If you agree with all the changes, approve the new person by clicking **Approval**. You will have the option to either approve the person or revert it to a draft (if you need to continue editing).

Approve this Person

Start Editing Finish All Editing **Approve** Publish

Approve that "Harry Potter" is ready to publish.

Approved by:

Holocentric Support ✕ Select

Approved on:

01 Jun 2023 📅

Next review:

Select when this version should next be reviewed 📅

Summary of what was changed:

Update contact details

Cancel Approve

TIP

If the new person is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Ready to Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**.

3.5 Click **Publishing** to officially publish latest version of that person. You also have the option to revert the person to a draft. Click **Publish immediately** to proceed with publication.

People > Persons

Harry Potter Ready to Publish v2 ⌵

Person Version

Email address: harrypotter@bmsnext.com

Notes:

Publishing ⌵

Publish Immediately

Revert to Draft

3.6 When you confirm publication, a release management workflow will appear. You have the option to edit the summary of what was changed. Click **Continue** to publish the new person.

Publish this Person immediately



Publishing immediately will make this item viewable to non-editors and will replace any existing published version. It will bypass the recommended managed release from 'Manage Changes' in 'Home'. Apart from Roles, any related unpublished items will remain unpublished.

Approved:

01 Jun 2023, by Holocentric Support

Summary of what was changed:

Update contact details

Cancel

Continue





3.7 The **Release label and notes** window appears. Write official release notes about the new person. You can edit the release notes later if required.

Release label and notes

Publishing: "Harry Potter"

Label this release: Harry Potter v2 Release

Release notes:

    Insert Clear Styles

Update contact details

Post a News Item about this when the items are published

News Item title: Harry Potter has been changed

News message: View the release notes for the published items

Include a link to the Release summary

Email notification: Email all users when this News Item is published

Cancel

Publish

Field	Description
Label this release	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

3.8 Click **Publish** to officially include the new person in the system. You will receive confirmation when the item is published.

END