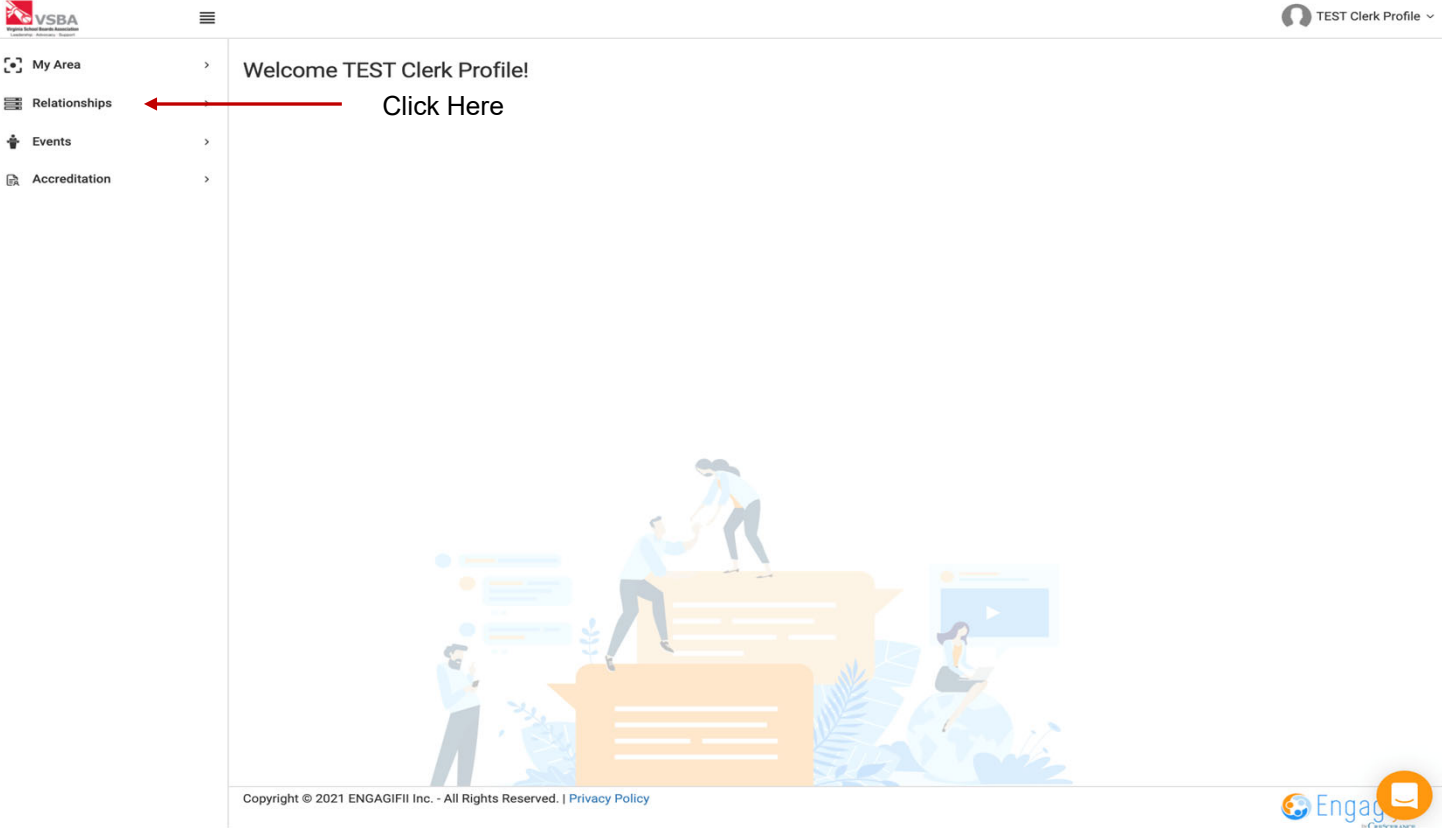


VSBA Database

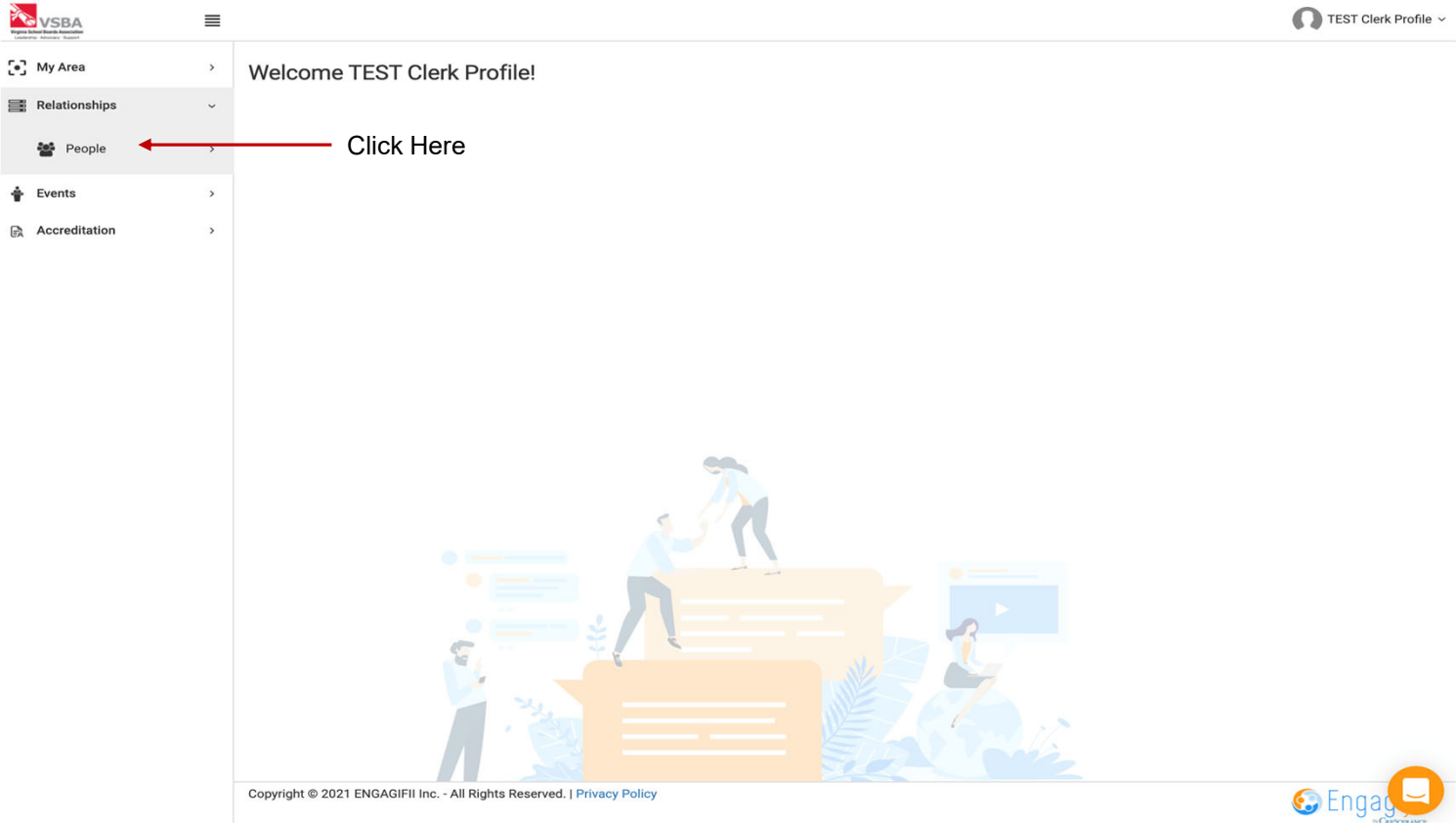
How To Add A Person in the Database

First Step: Log into the Database, once you are logged in this is how the screen will appear. Once you log in, please select on the relationships tab.



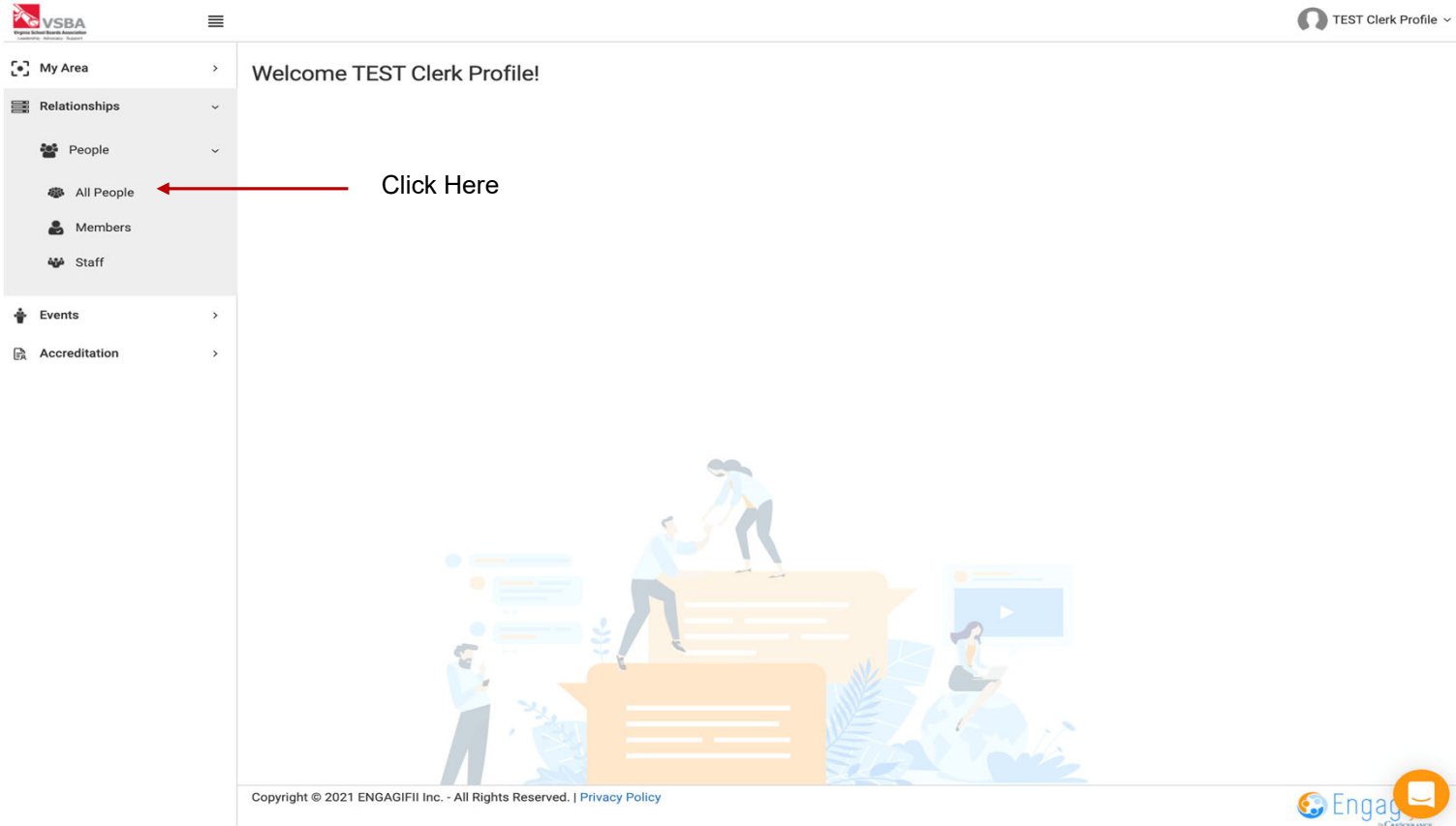
The screenshot shows the VSBA database interface. At the top left is the VSBA logo. In the top right corner, there is a user profile icon labeled "TEST Clerk Profile" with a dropdown arrow. On the left side, there is a navigation menu with four items: "My Area", "Relationships", "Events", and "Accreditation". Each item has a right-pointing chevron. A red arrow points from the "Relationships" item to the text "Click Here" in the main content area. The main content area displays "Welcome TEST Clerk Profile!". At the bottom of the main content area, there is a large illustration of people interacting with data and technology. At the bottom left of the interface, there is a copyright notice: "Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy". At the bottom right, there is the Engage logo.

Next Step: Once you have click on the relationships tab it will open to the people tab.



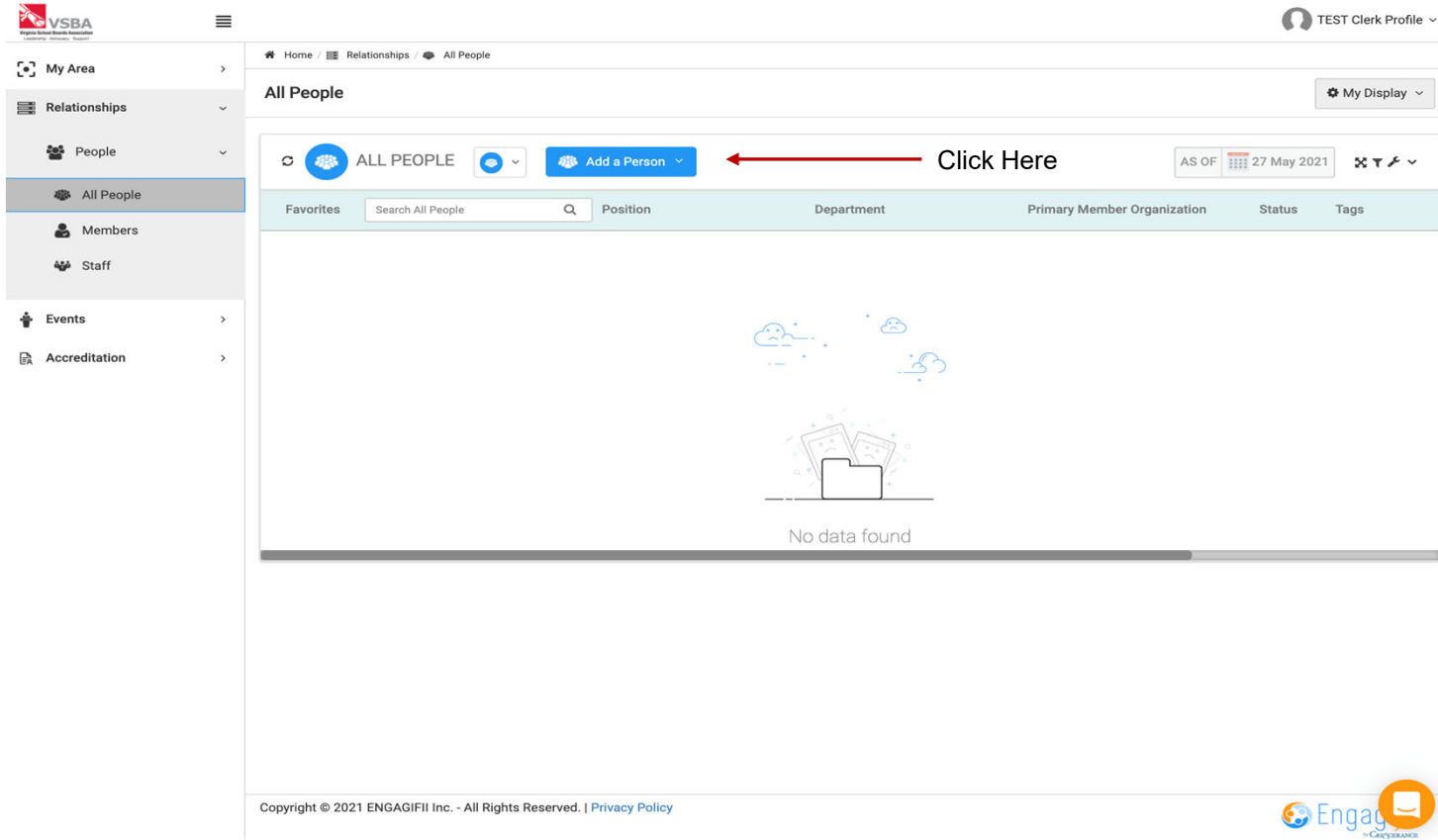
The screenshot shows the VSBA website interface. On the left is a navigation menu with the following items: 'My Area', 'Relationships', 'People', 'Events', and 'Accreditation'. The 'Relationships' tab is currently selected, and the 'People' sub-tab is highlighted. A red arrow points to the 'People' sub-tab with the text 'Click Here'. The main content area displays 'Welcome TEST Clerk Profile!' and a large illustration of people interacting with digital content. At the bottom of the page, there is a copyright notice: 'Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engage logo.

Next Step: After you have clicked on the people tab, you will need to click on the all people tab.



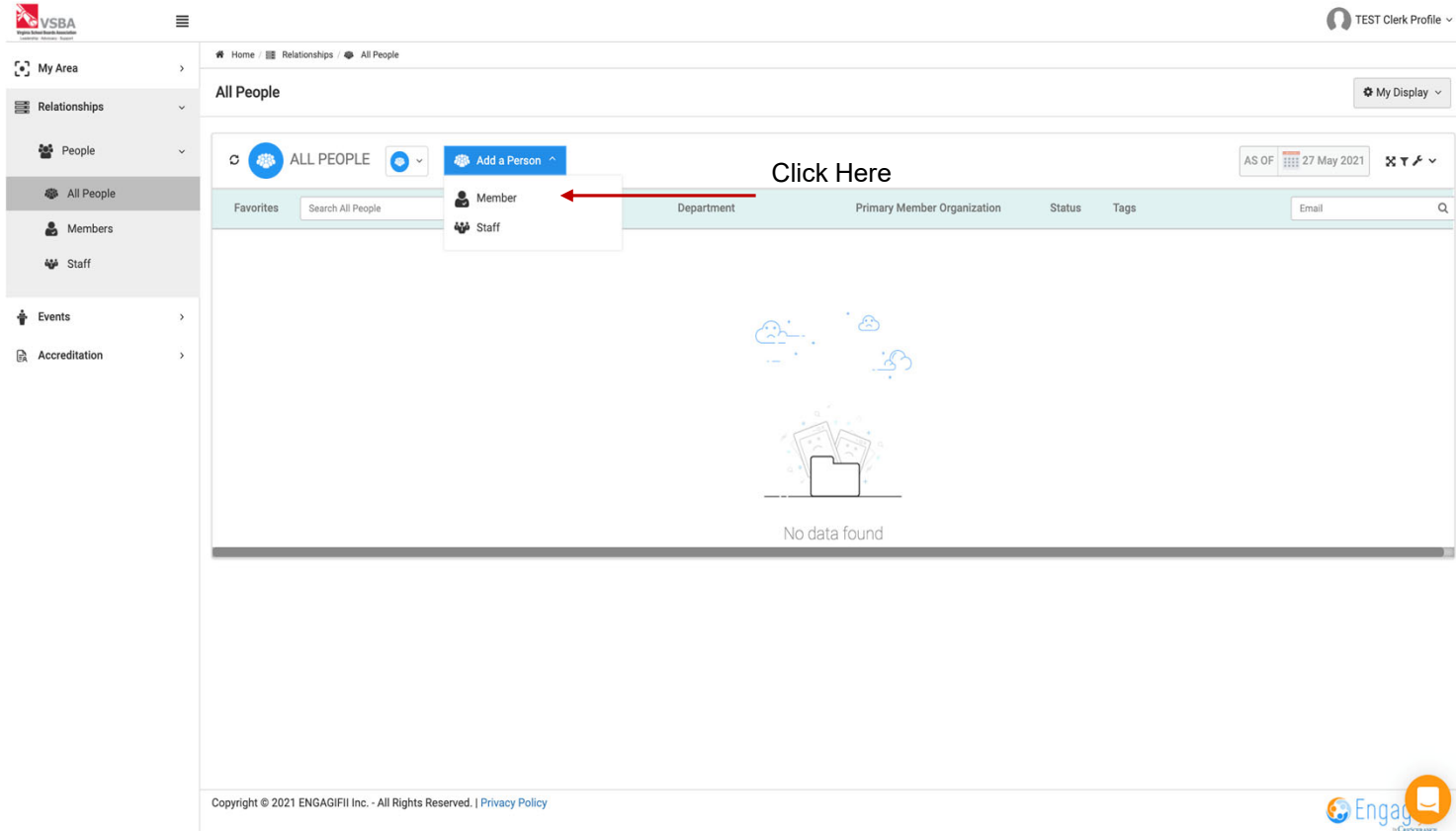
The screenshot shows the VSBA web application interface. At the top left is the VSBA logo and navigation menu. The menu includes 'My Area', 'Relationships', 'Events', and 'Accreditation'. Under 'Relationships', there are sub-items: 'People', 'All People', 'Members', and 'Staff'. A red arrow points to the 'All People' link with the text 'Click Here'. The main content area displays 'Welcome TEST Clerk Profile!' and a large illustration of people interacting with digital content. At the bottom, there is a copyright notice for ENGAGIFII Inc. and the Engage logo.

Next Step: After you have clicked on the all people tab, this is how the screen should appear. You can click on “Add a person” tab.



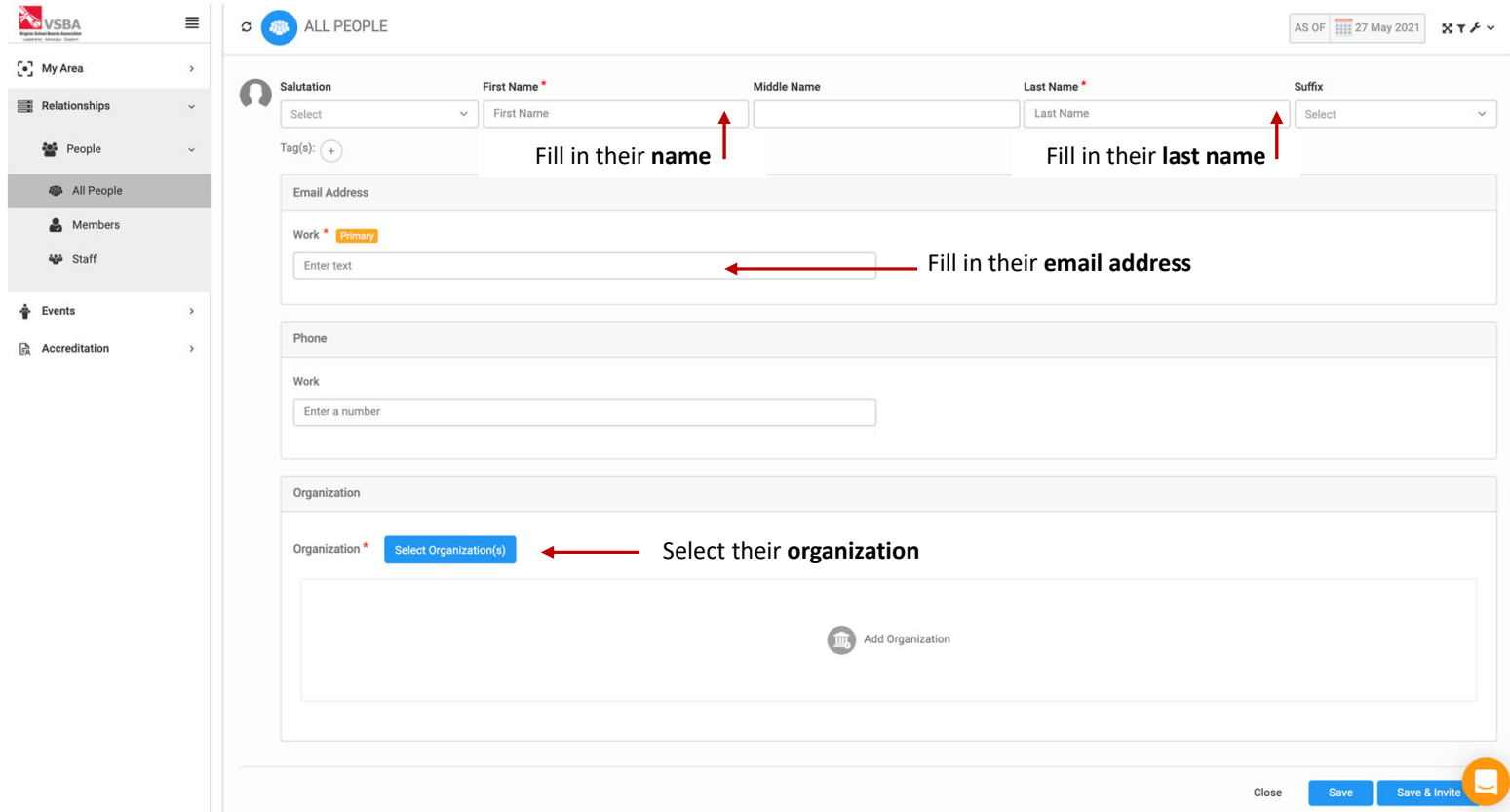
The screenshot shows the VSBA web application interface. On the left is a navigation menu with items: My Area, Relationships, People, All People (highlighted), Members, Staff, Events, and Accreditation. The main content area is titled 'All People' and includes a breadcrumb trail: Home / Relationships / All People. At the top right of the main area, there is a user profile 'TEST Clerk Profile' and a 'My Display' settings button. Below the title, there is a toolbar with a refresh icon, 'ALL PEOPLE' text, a dropdown menu, and a blue 'Add a Person' button with a red arrow pointing to it and the text 'Click Here'. To the right of the toolbar is a date filter 'AS OF 27 May 2021' and a filter icon. Below the toolbar is a table header with columns: Favorites, Search All People (with a search icon), Position, Department, Primary Member Organization, Status, and Tags. The table body is empty and contains a 'No data found' message with an illustration of a folder and clouds. At the bottom of the page, there is a copyright notice: 'Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

Once you clicked on “Add a person” tab, you will see two options. Select on the member tab. **YOU WILL NEVER SELECT STAFF, ALWAYS SELECT MEMBER!**



The screenshot shows the VSBA web application interface. On the left is a navigation sidebar with categories: My Area, Relationships, People, All People (selected), Members, Staff, Events, and Accreditation. The main content area is titled 'All People' and includes a breadcrumb trail: Home / Relationships / All People. A 'My Display' button is in the top right. Below the title bar, there is a search bar for 'ALL PEOPLE' and an 'Add a Person' dropdown menu. The dropdown menu is open, showing two options: 'Member' and 'Staff'. A red arrow points to the 'Member' option, and the text 'Click Here' is positioned above the dropdown. The main table area is currently empty, displaying 'No data found' with a folder icon. The table headers are: Department, Primary Member Organization, Status, Tags, and Email. The footer contains copyright information for ENGAGIFII Inc. and the Engage logo.

The screen should appear like this. Please make sure to fill out ALL Information on this page to generate their record.



The screenshot shows the 'ALL PEOPLE' form in the VSBA system. The form is titled 'ALL PEOPLE' and includes a date filter 'AS OF 27 May 2021'. The form is divided into several sections: Name, Email Address, Phone, and Organization. Red arrows point to the 'First Name', 'Last Name', 'Email Address', and 'Organization' fields, indicating they are required. The 'Organization' field has a 'Select Organization(s)' button and an 'Add Organization' button. The 'Email Address' field has a 'Work' label and a 'Primary' tag. The 'Phone' field has a 'Work' label. The 'Organization' field has a 'Select Organization(s)' button and an 'Add Organization' button. The 'Organization' field has a 'Select Organization(s)' button and an 'Add Organization' button. The 'Organization' field has a 'Select Organization(s)' button and an 'Add Organization' button.

VSBA ALL PEOPLE AS OF 27 May 2021

Salutation First Name * Middle Name Last Name * Suffix

Tag(s): + Fill in their name Fill in their last name

Email Address

Work * Primary Enter text Fill in their email address

Phone

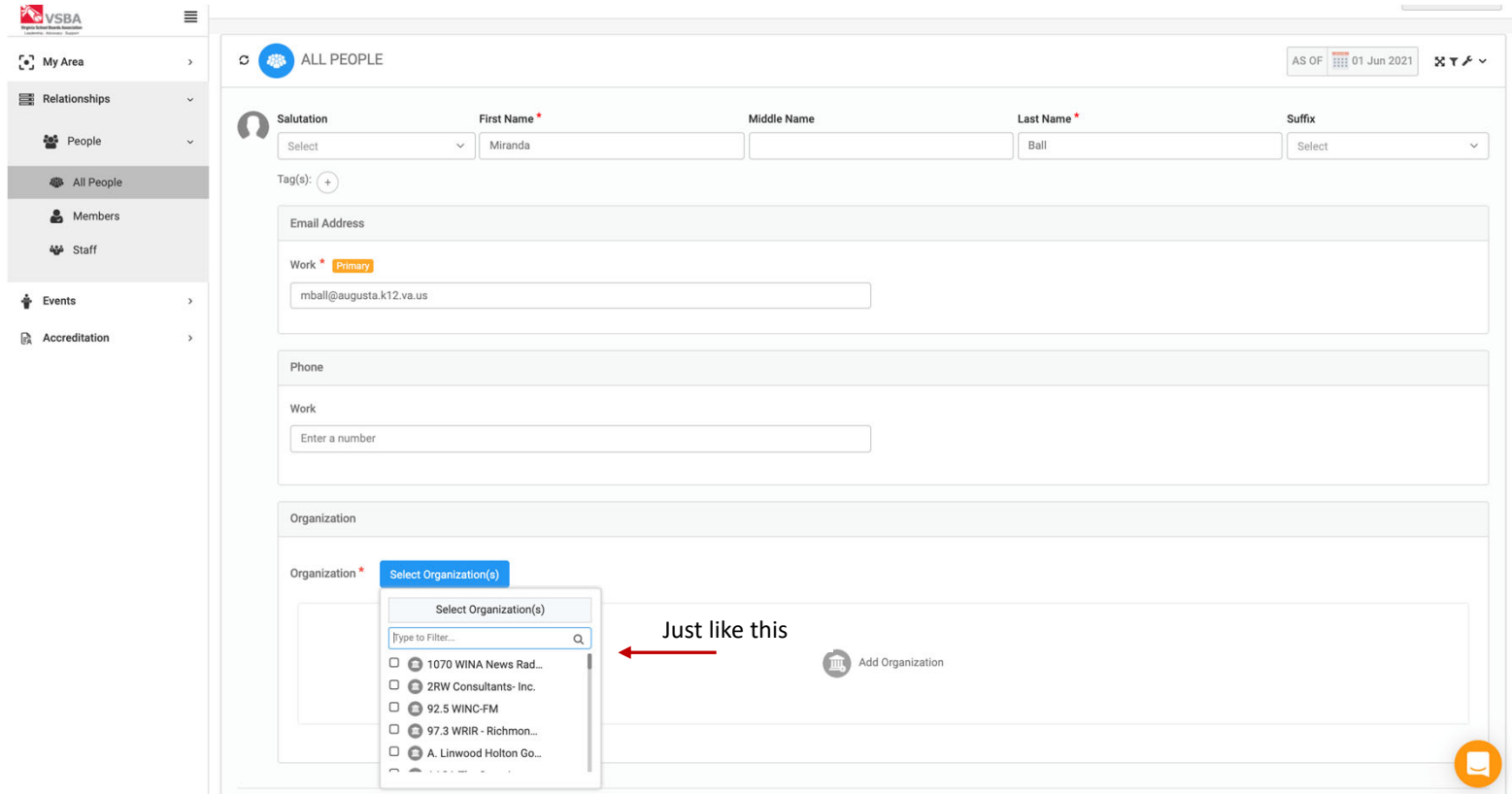
Work Enter a number

Organization

Organization * Select Organization(s) Select their organization Add Organization

Close Save Save & Invite

After filling in their information you will need to select their organization. You can start by typing in the name of the organization in the box like below.



The screenshot shows the 'ALL PEOPLE' profile page in the VSBA system. The form includes fields for Salutation, First Name (Miranda), Middle Name, Last Name (Ball), and Suffix. Below these are sections for Email Address (Work: mball@augusta.k12.va.us), Phone (Work), and Organization. The Organization field is currently empty, and a dropdown menu is open, showing a search bar and a list of organizations. A red arrow points to the search bar with the text 'Just like this'.

Organization *

Select Organization(s)

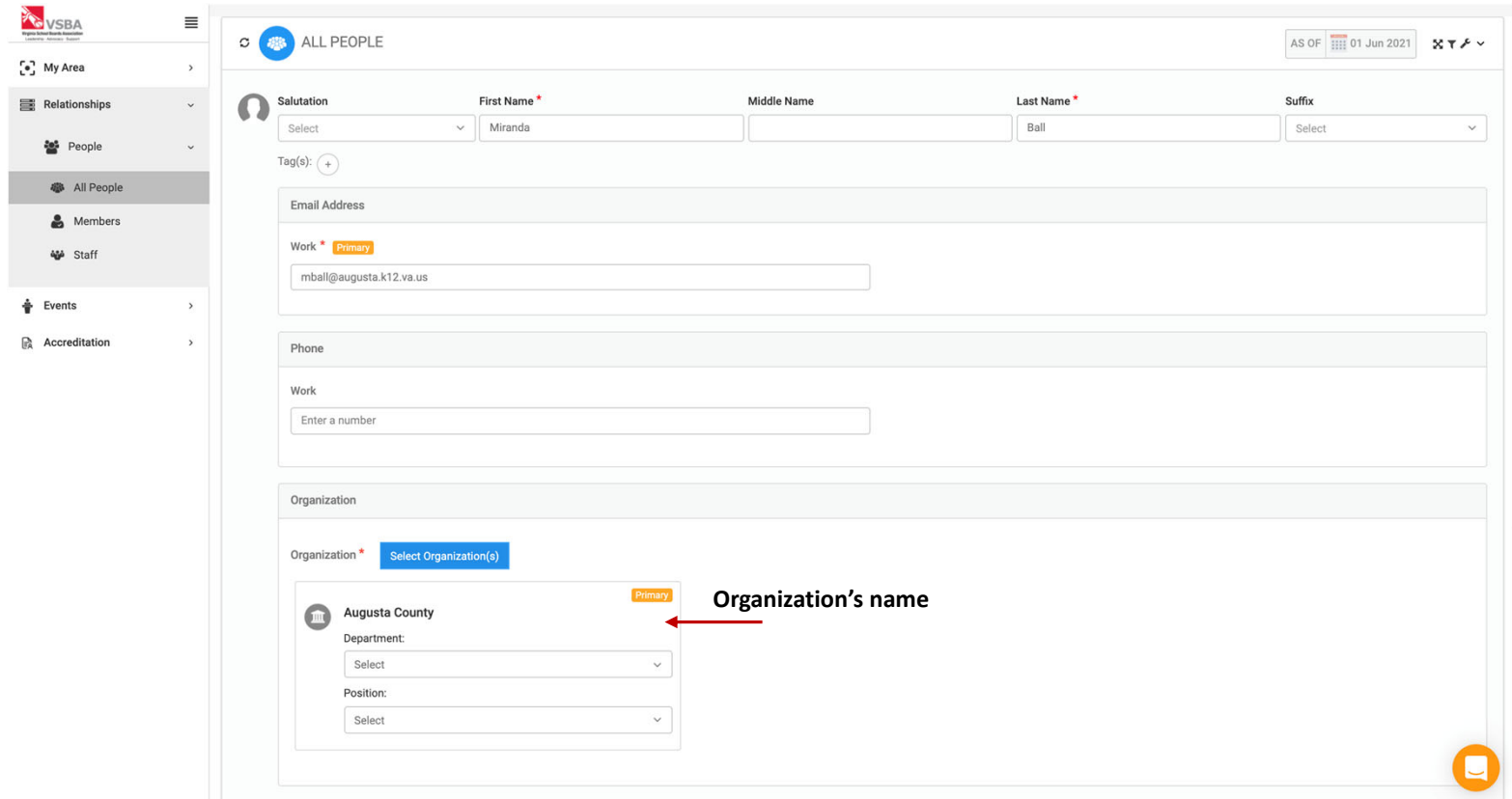
Type to Filter...

- 1070 WINA News Rad...
- 2RW Consultants- Inc.
- 92.5 WINC-FM
- 97.3 WRIR - Richmon...
- A. Linwood Holton Go...

Just like this

Add Organization

The selected organization would look like this.



VSBA
Virginia School Boards Association
Leadership · Advocacy · Support

My Area >
Relationships >
People >
All People
Members
Staff
Events >
Accreditation >

ALL PEOPLE AS OF 01 Jun 2021

Salutation: Select
First Name: Miranda
Middle Name:
Last Name: Ball
Suffix: Select

Tag(s): +

Email Address
Work * Primary
mball@augusta.k12.va.us

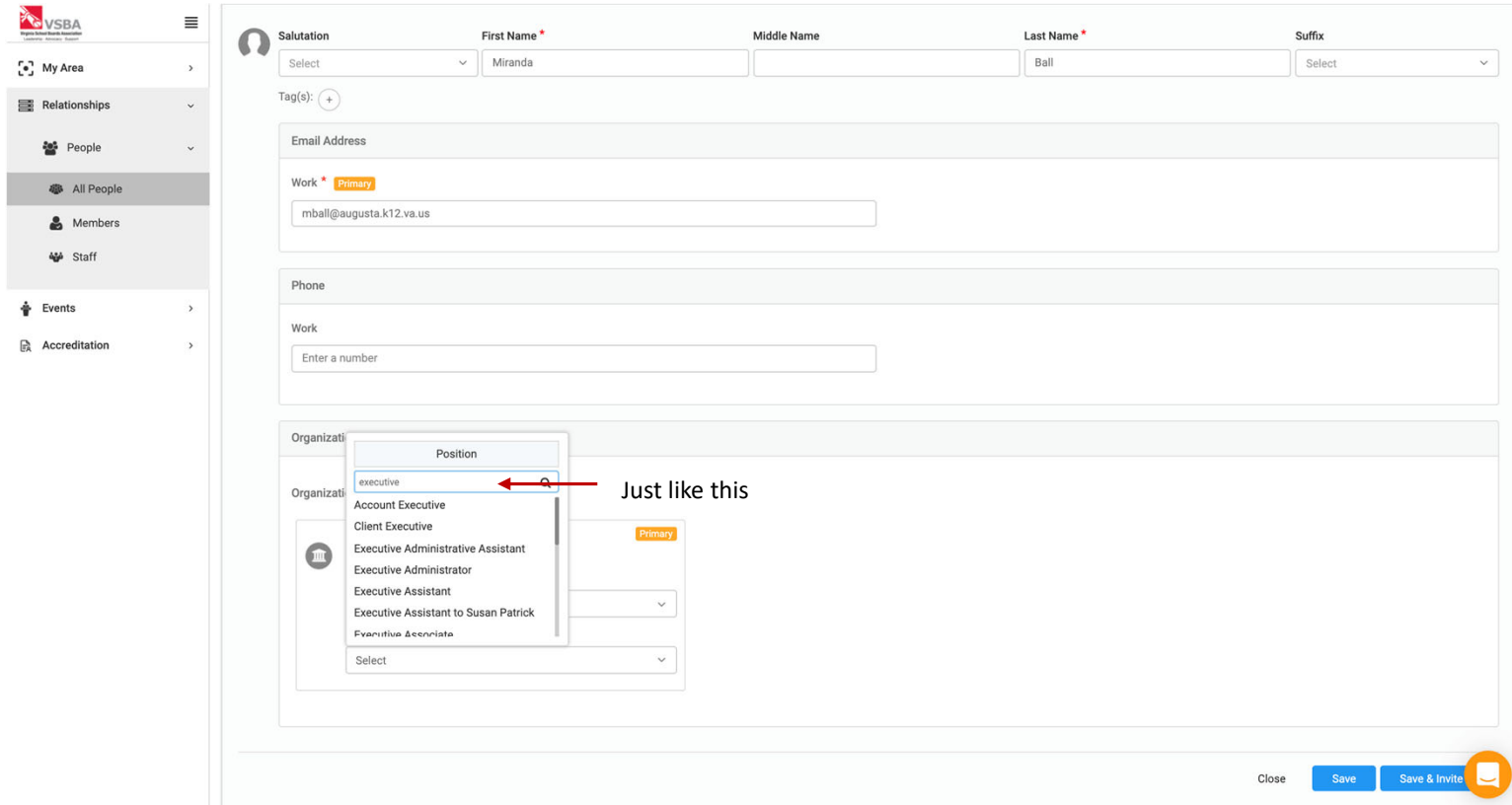
Phone
Work
Enter a number

Organization
Organization * Select Organization(s)

Augusta County Primary
Department: Select
Position: Select

Organization's name

After selecting organization, you would need to select their position. You can start typing the selected position name. Please keep in mind when searching less is more, only type in the first four letters of what you are trying to find.



The screenshot shows a user profile form with the following fields:

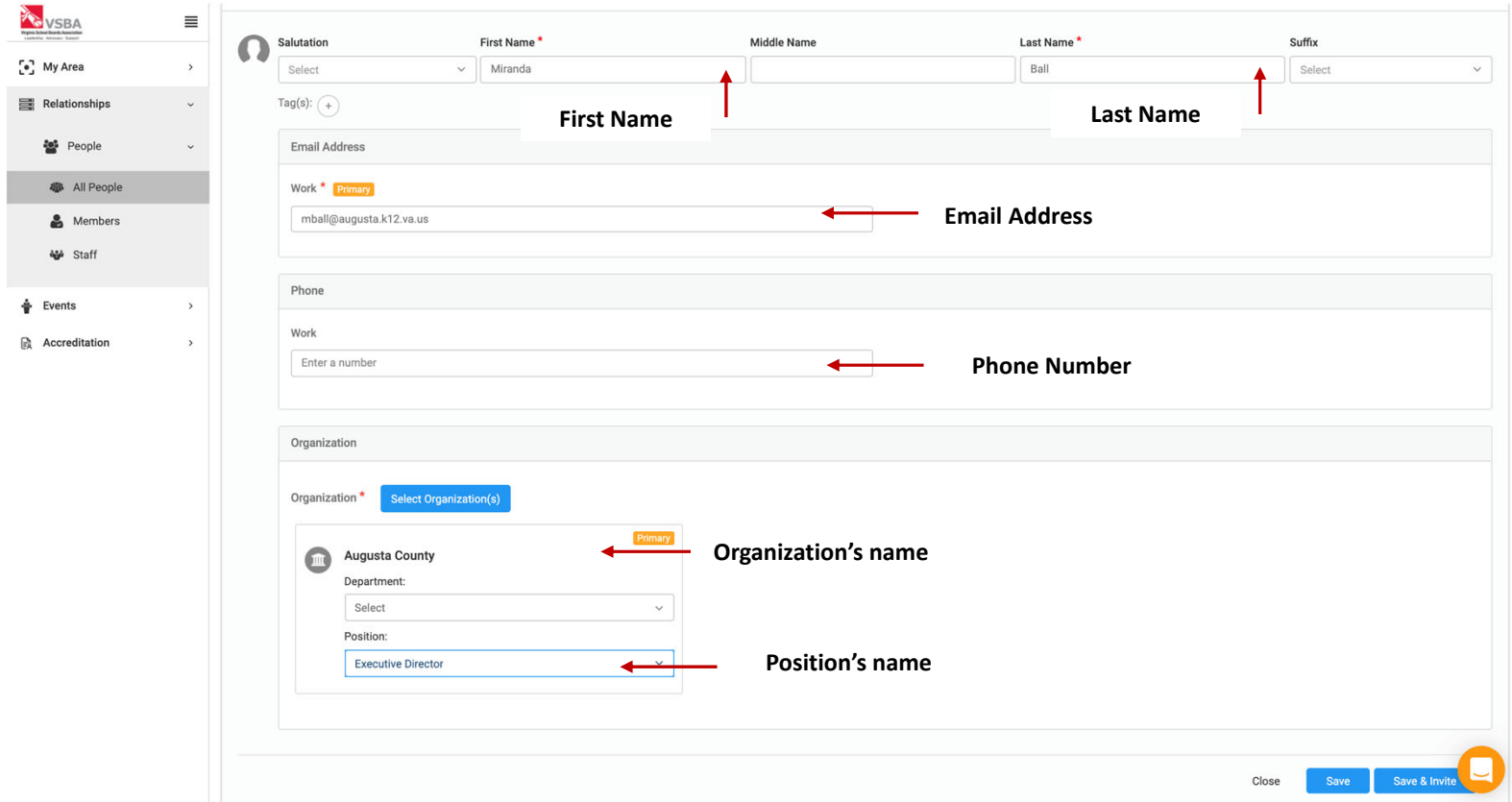
- Salutation: Select
- First Name: Miranda
- Middle Name: (empty)
- Last Name: Ball
- Suffix: Select
- Tag(s): (+)
- Email Address: Work (Primary) mball@augusta.k12.va.us
- Phone: Work Enter a number
- Organization: (dropdown menu open)

The position dropdown menu is open, showing a search bar with the text "executive" and a magnifying glass icon. Below the search bar, the following positions are listed:

- Account Executive
- Client Executive
- Executive Administrative Assistant
- Executive Administrator
- Executive Assistant
- Executive Assistant to Susan Patrick
- Executive Associate
- Select

A red arrow points from the text "Just like this" to the search bar in the dropdown menu. At the bottom right of the form, there are buttons for "Close", "Save", "Save & Invite", and a chat icon.

Once all of the information is filled out on the page you are able to go ahead to the final step.



The screenshot shows a user profile form with the following fields and annotations:

- Salutation:** Select (dropdown)
- First Name:** Miranda (text input, with red arrow pointing to it)
- Middle Name:** (empty text input)
- Last Name:** Ball (text input, with red arrow pointing to it)
- Suffix:** Select (dropdown)
- Tag(s):** (+) (button)
- Email Address:** mball@augusta.k12.va.us (text input, with red arrow pointing to it)
- Phone:** Enter a number (text input, with red arrow pointing to it)
- Organization:** Select Organization(s) (button)
- Organization's name:** Augusta County (text input, with red arrow pointing to it)
- Position's name:** Executive Director (dropdown menu, with red arrow pointing to it)

At the bottom right, there are buttons for "Close", "Save", and "Save & Invite" (with a notification icon).

After **ALL** information is filled out, select "save."

- VSBA
- My Area
- Relationships
 - People
 - All People
 - Members
 - Staff
- Events
- Accreditation

Salutation: Select | First Name: Miranda | Middle Name: | Last Name: Ball | Suffix: Select

Tag(s): +

Email Address

Work * Primary
mball@augusta.k12.va.us

Phone

Work
Enter a number

Organization

Organization * Select Organization(s)

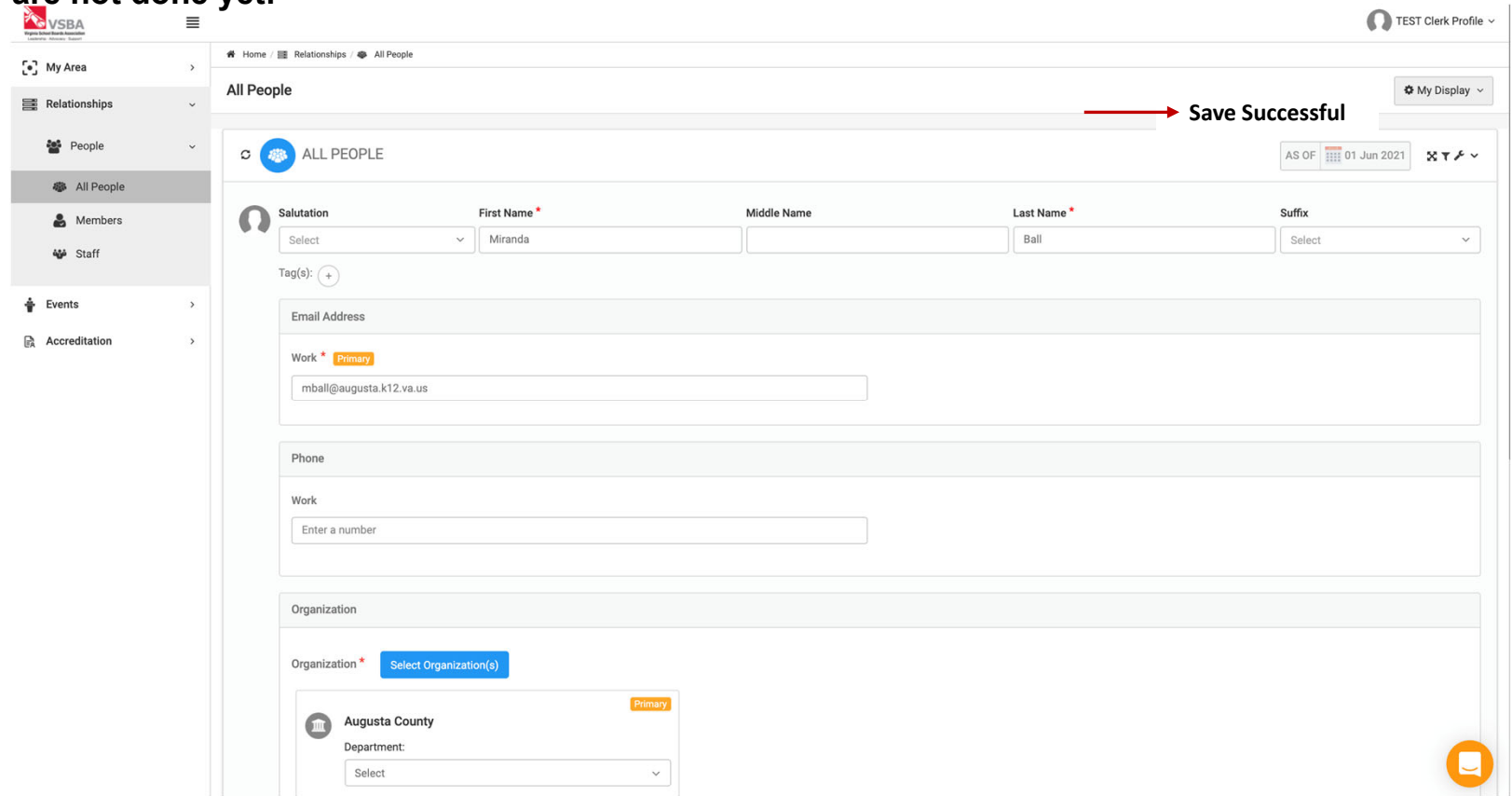
Augusta County Primary
Department: Select
Position: Executive Director

Close Save Save & Invite

Click Here



A "save successful" tab will appear on the top right and your record has been generated, but you are not done yet!



VSBA TEST Clerk Profile

Home / Relationships / All People

All People My Display

ALL PEOPLE AS OF 01 Jun 2021

Salutation First Name * Middle Name Last Name * Suffix

Select Miranda Ball Select

Tag(s): +

Email Address

Work * Primary
mball@augusta.k12.va.us


Phone

Work
Enter a number


Organization

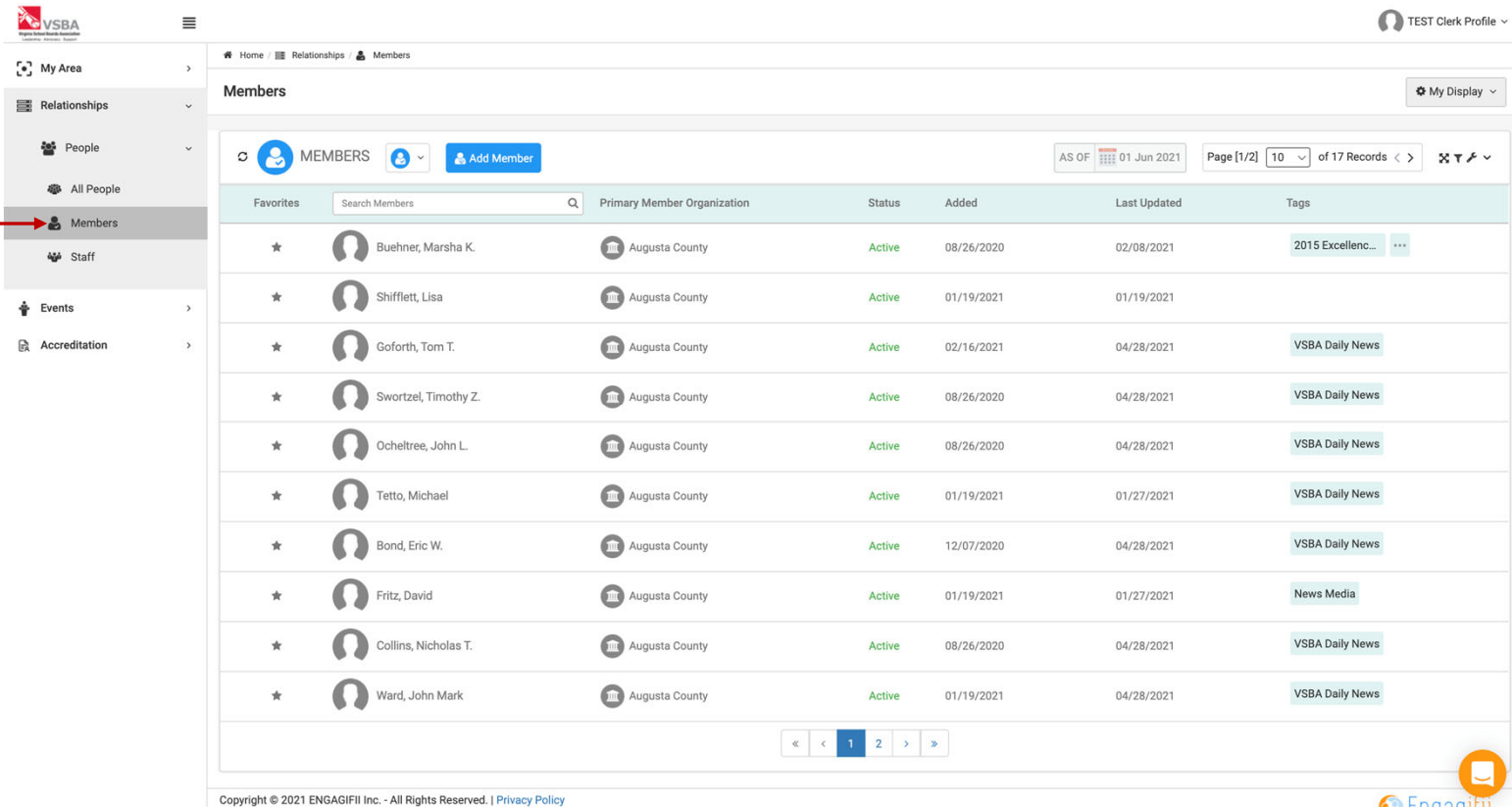
Organization * Select Organization(s)

Augusta County Primary
Department:
Select



Please go back to find your member again that you have added as you will need to fill in the rest of their information. You would need to go to the “Members” tab, underneath All People to find the person. The screen should appear like this.

Click here 

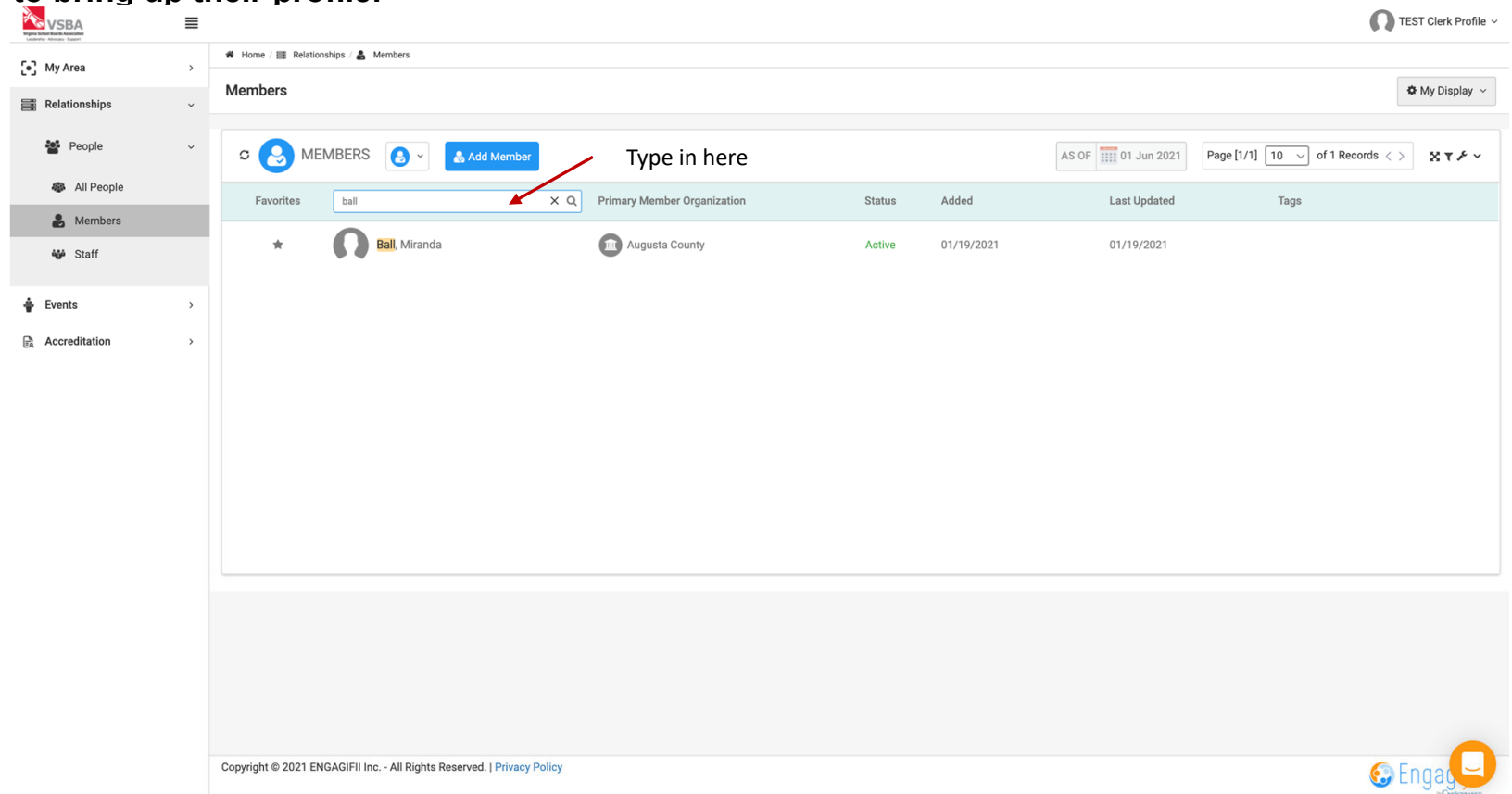


MEMBERS AS OF 01 Jun 2021 Page [1/2] 10 of 17 Records

Favorites	Search Members	Primary Member Organization	Status	Added	Last Updated	Tags
★		Augusta County	Active	08/26/2020	02/08/2021	2015 Excellenc...
★		Augusta County	Active	01/19/2021	01/19/2021	
★		Augusta County	Active	02/16/2021	04/28/2021	VSBA Daily News
★		Augusta County	Active	08/26/2020	04/28/2021	VSBA Daily News
★		Augusta County	Active	08/26/2020	04/28/2021	VSBA Daily News
★		Augusta County	Active	01/19/2021	01/27/2021	VSBA Daily News
★		Augusta County	Active	12/07/2020	04/28/2021	VSBA Daily News
★		Augusta County	Active	01/19/2021	01/27/2021	News Media
★		Augusta County	Active	08/26/2020	04/28/2021	VSBA Daily News
★		Augusta County	Active	01/19/2021	04/28/2021	VSBA Daily News

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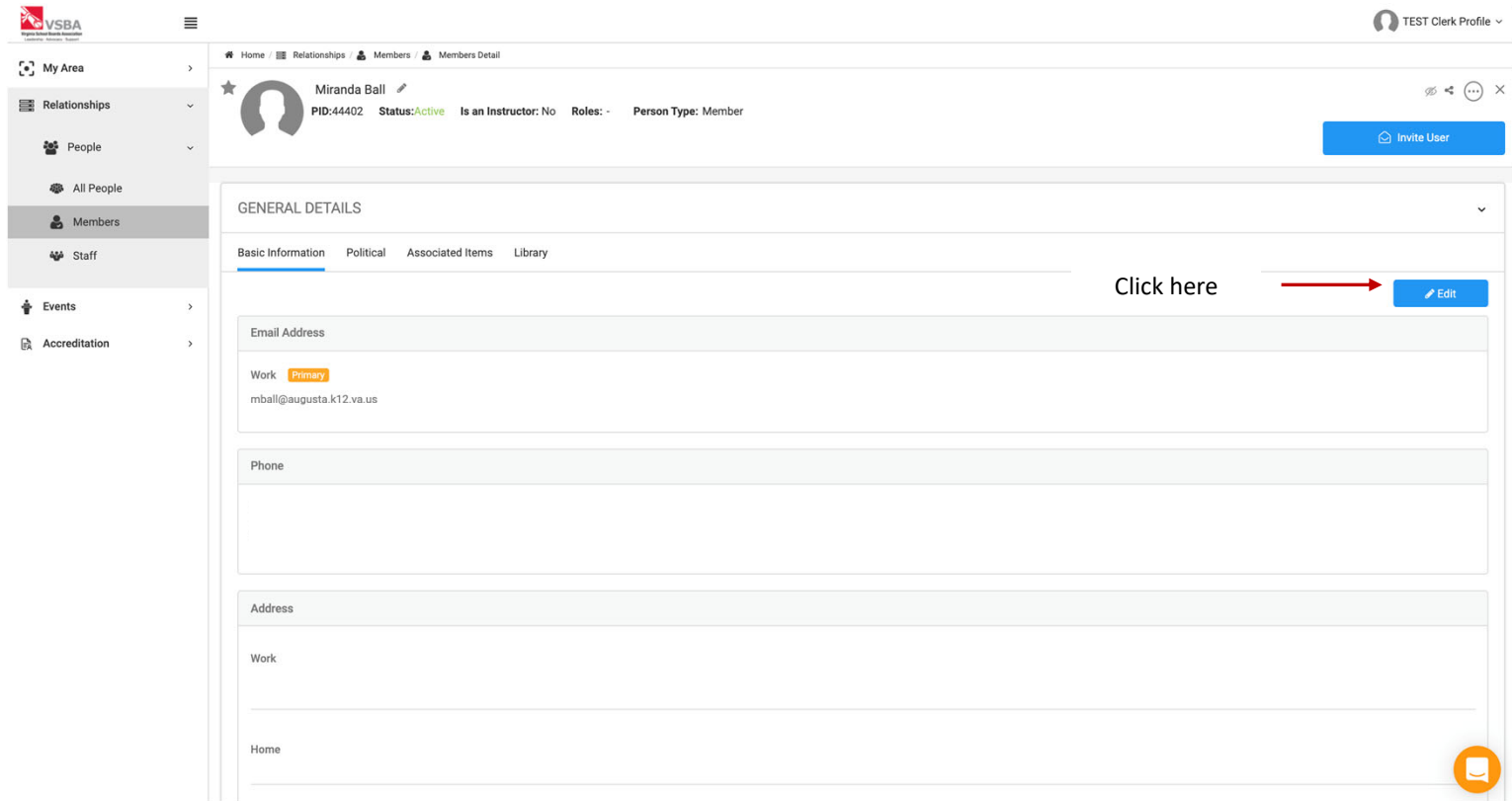
To find the person you can either type in their first or last name in the search tab. Then, the screen should appear like this as it is the only Ms. Miranda Ball in the system. Click on their name to bring up their profile.



The screenshot shows the VSBA Members page. The left sidebar contains navigation options: My Area, Relationships (with sub-options: People, All People, Members, Staff), Events, and Accreditation. The main content area is titled 'Members' and includes a search bar with the text 'ball' and a red arrow pointing to it. Below the search bar is a table with one record for Ms. Miranda Ball. The table columns are: Favorites, Primary Member Organization, Status, Added, Last Updated, and Tags. The record shows 'Ball, Miranda' as the member name, 'Augusta County' as the organization, 'Active' as the status, and '01/19/2021' for both the added and last updated dates. The footer contains the copyright notice 'Copyright © 2021 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engage logo.

Favorites	Primary Member Organization	Status	Added	Last Updated	Tags
★	Augusta County	Active	01/19/2021	01/19/2021	

Once you get to their profile, click on the “edit” button to go into their profile and fill in ALL information. There are two tabs that have information to be filled out on, Basic Information and Political. **Both tabs need to be filled out 100%!**



VSBA
TEST Clerk Profile

Home / Relationships / Members / Members Detail

Miranda Ball
PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member

Invite User

GENERAL DETAILS

Basic Information Political Associated Items Library

Click here → Edit

Email Address

Work Primary
mball@augusta.k12.va.us

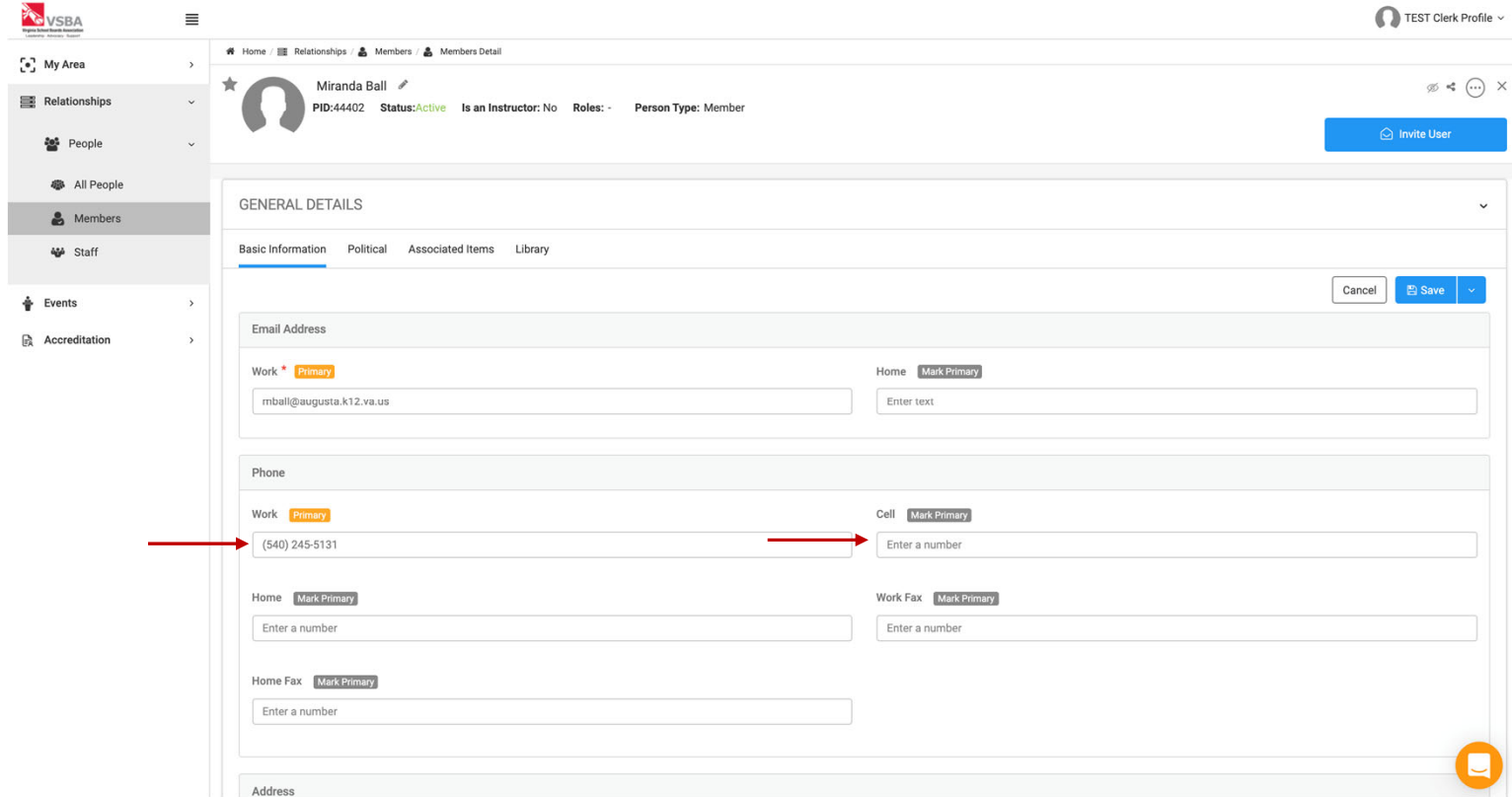
Phone

Address

Work

Home

First, fill out the phone number tab. If you have both work and cell phone numbers, add both in. If not, just add in the work phone number.



VSBA
Virginia School Boards Association

Home / Relationships / Members / Members Detail

Miranda Ball
PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member

Invite User

GENERAL DETAILS

Basic Information Political Associated Items Library

Cancel Save

Email Address

Work **Primary** Home **Mark Primary**

mball@augusta.k12.va.us Enter text

Phone

Work **Primary** Cell **Mark Primary**

(540) 245-5131 Enter a number

Home **Mark Primary** Work Fax **Mark Primary**

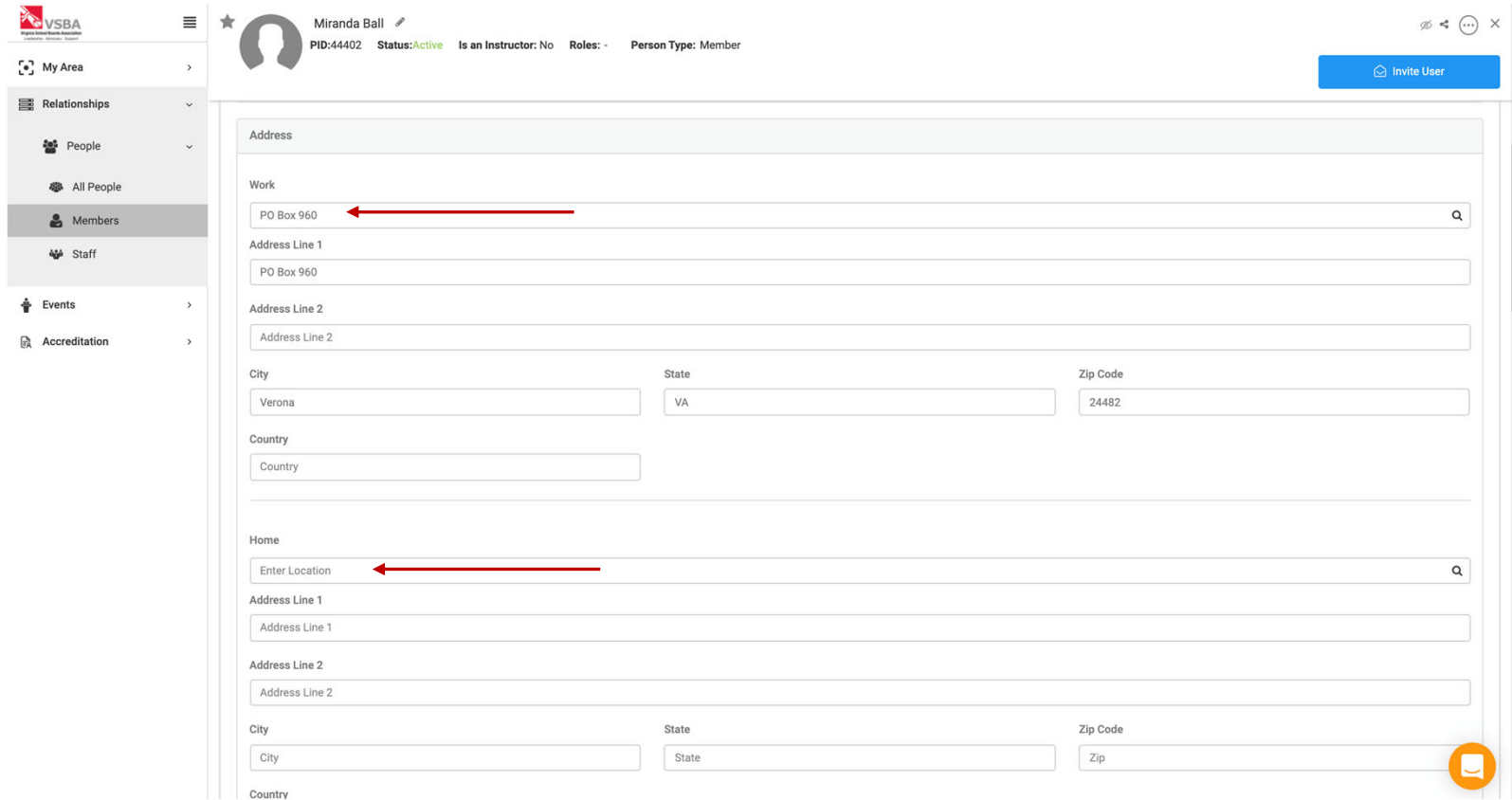
Enter a number Enter a number

Home Fax **Mark Primary**

Enter a number

Address

Next, fill out their work address and add in the home address.



The screenshot shows the VSBA user profile page for Miranda Ball. The page includes a navigation sidebar on the left with options like My Area, Relationships, People, All People, Members, Staff, Events, and Accreditation. The main content area displays the user's profile information, including their name, PID (44402), status (Active), and roles. Below this, there are two address sections: Work and Home. The Work address section has a search bar with 'PO Box 960' and a red arrow pointing to it, followed by fields for Address Line 1, Address Line 2, City (Verona), State (VA), and Zip Code (24482). The Home address section has a search bar with 'Enter Location' and a red arrow pointing to it, followed by fields for Address Line 1, Address Line 2, City, State, and Zip Code. An 'Invite User' button is visible in the top right corner.

Work Address:

PO Box 960

Address Line 1: PO Box 960

Address Line 2: Address Line 2

City: Verona | State: VA | Zip Code: 24482

Country: Country

Home Address:

Enter Location

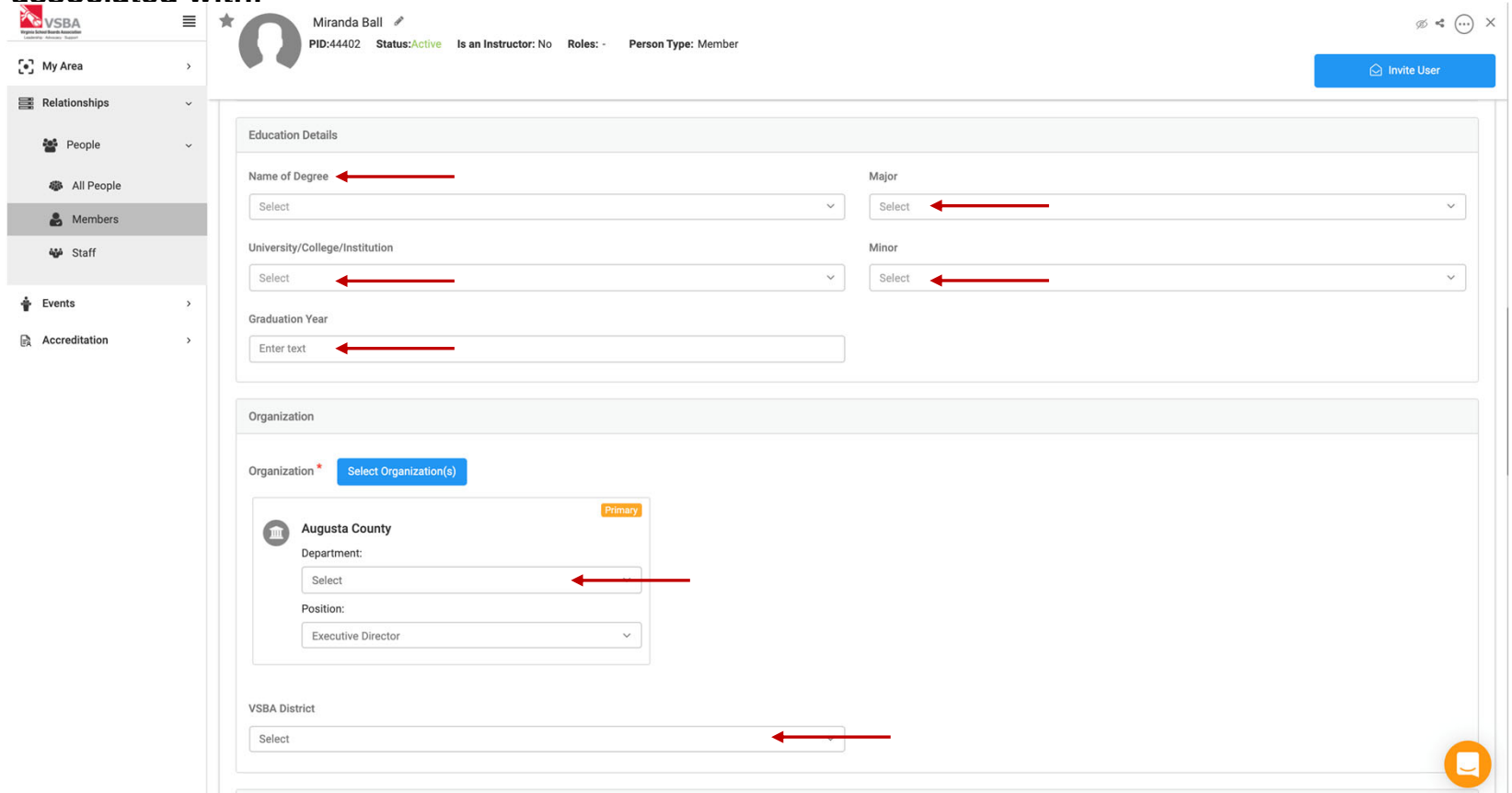
Address Line 1: Address Line 1


Address Line 2: Address Line 2

City: City | State: State | Zip Code: Zip

Country: Country

**Fill out the education details.
For organization, add in her department name if relevant and the VSBA District they are associated with.**



Miranda Ball  PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member

[My Area](#) [Relationships](#) [People](#) [All People](#) [Members](#) [Staff](#) [Events](#) [Accreditation](#)

[Invite User](#)

Education Details

Name of Degree	Major
<input type="text" value="Select"/>	<input type="text" value="Select"/>
University/College/Institution	Minor
<input type="text" value="Select"/>	<input type="text" value="Select"/>
Graduation Year	
<input type="text" value="Enter text"/>	

Organization

Organization * [Select Organization\(s\)](#)

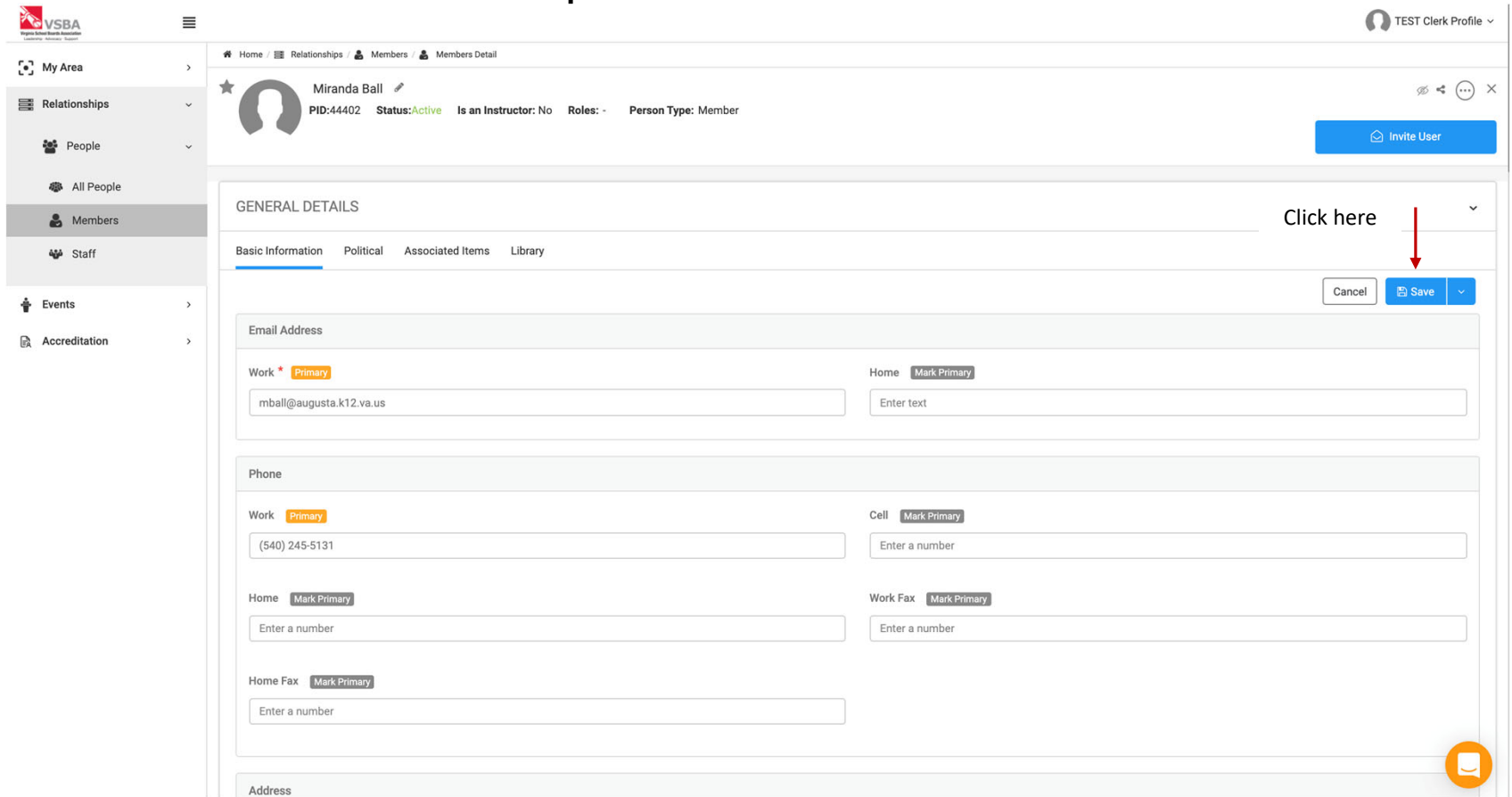
Augusta County Primary

Department:

Position:

VSBA District

Once all information is completed on that tab please make sure that you click save and then you will move onto the next tab which is political.



The screenshot shows the VSBA Members Detail page for Miranda Ball. The page includes a navigation sidebar on the left with options like My Area, Relationships, People, Members, Staff, Events, and Accreditation. The main content area displays the member's profile with fields for Email Address, Work, Home, Cell, Home, Work Fax, and Home Fax. A red arrow points to the 'Save' button in the top right corner of the form, with the text 'Click here' next to it. The 'Save' button is highlighted in blue.

VSBA
TEST Clerk Profile

Home / Relationships / Members / Members Detail

Miranda Ball
PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member

Invite User

GENERAL DETAILS

Click here

Cancel Save

Email Address

Work * Primary Home Mark Primary

mball@augusta.k12.va.us Enter text

Phone

Work Primary Cell Mark Primary

(540) 245-5131 Enter a number

Home Mark Primary Work Fax Mark Primary

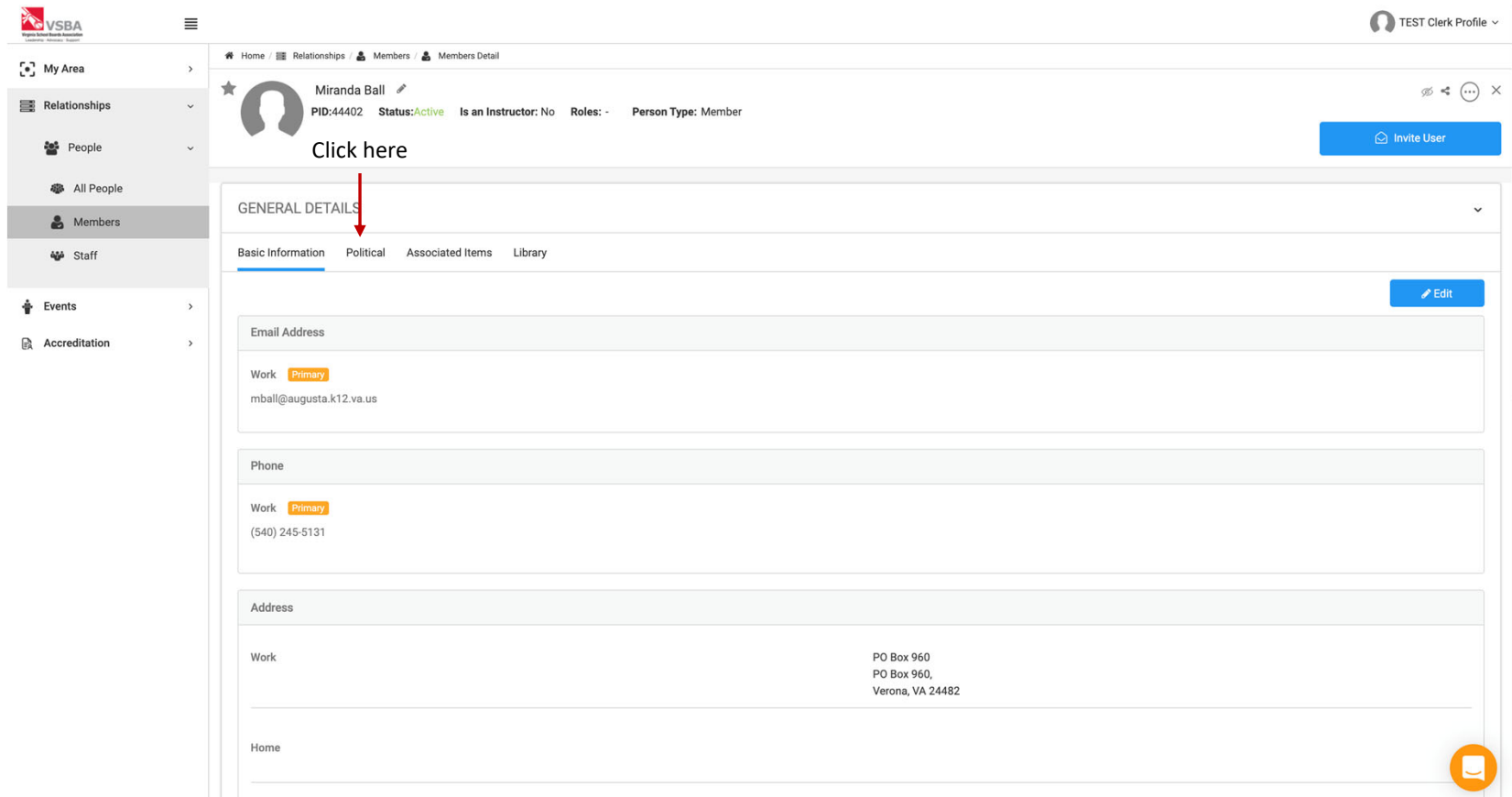
Enter a number Enter a number

Home Fax Mark Primary

Enter a number


Address

Navigate to the political tab by selecting on the word political.




The screenshot shows the VSBA Members Detail page for Miranda Ball. The page has a left sidebar with navigation options: My Area, Relationships, People, All People, Members, Staff, Events, and Accreditation. The main content area shows the member's profile with a star icon, name, PID:44402, Status:Active, Is an Instructor: No, Roles: -, and Person Type: Member. Below the profile is a 'Click here' link with a red arrow pointing to the 'Political' tab in the 'GENERAL DETAILS' section. The 'Political' tab is currently selected. The page also features an 'Invite User' button and an 'Edit' button. The address section shows work and home addresses, with the work address being PO Box 960, Verona, VA 24482.

Fill out the board service section below if the person is on the school board. If the person is not a school board member, superintendent, or clerk you do not have to fill out for School Personnel. For personal information, add in gender and race.



- My Area >
- Relationships >
- People >
- All People
- Members**
- Staff
- Events >
- Accreditation >



Miranda Ball

PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member

[Invite User](#)


Board Service


<p>Initial Appt. ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	<p>Current Term ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>
<p>Previous Term 1 ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	<p>Previous Term 2 ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>
<p>Years on Board ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Enter a number 🗑️ </div>	<p>VSBA Board of Directors ← Select</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>
<p>Start Date as Policy Contact ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	<p>Current Term Start ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>
<p>Current Term End ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	<p>Previous Term 1 Start ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>
<p>Previous Term 1 End ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	<p>Previous Term 2 Start ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>
<p>Previous Term 2 End ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select Date 🗑️ </div>	


Personal Information

<p>Gender ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select ⌵ </div>	<p>Race ←</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select ⌵ </div>
--	--





**Continue on filling out their personal information.
For member details, you can see what that members has taken or is taking. No need to edit.**





Miranda Ball 

PID:44402 Status:Active Is an Instructor: No Roles: - Person Type: Member


Invite User

Personal Information

Gender <input type="text" value="Select"/>	Race <input type="text" value="Select"/>
Date of Birth <input type="text" value="Select Date"/>	Term Status <input type="text" value="Select"/>
Communication Pref <input type="text" value="Select"/>	Informal Name <input type="text" value="Enter text"/>
Profession <input type="text" value="Enter text"/>	Spouse <input type="text" value="Enter text"/>
Assistant <input type="text" value="Enter text"/>	

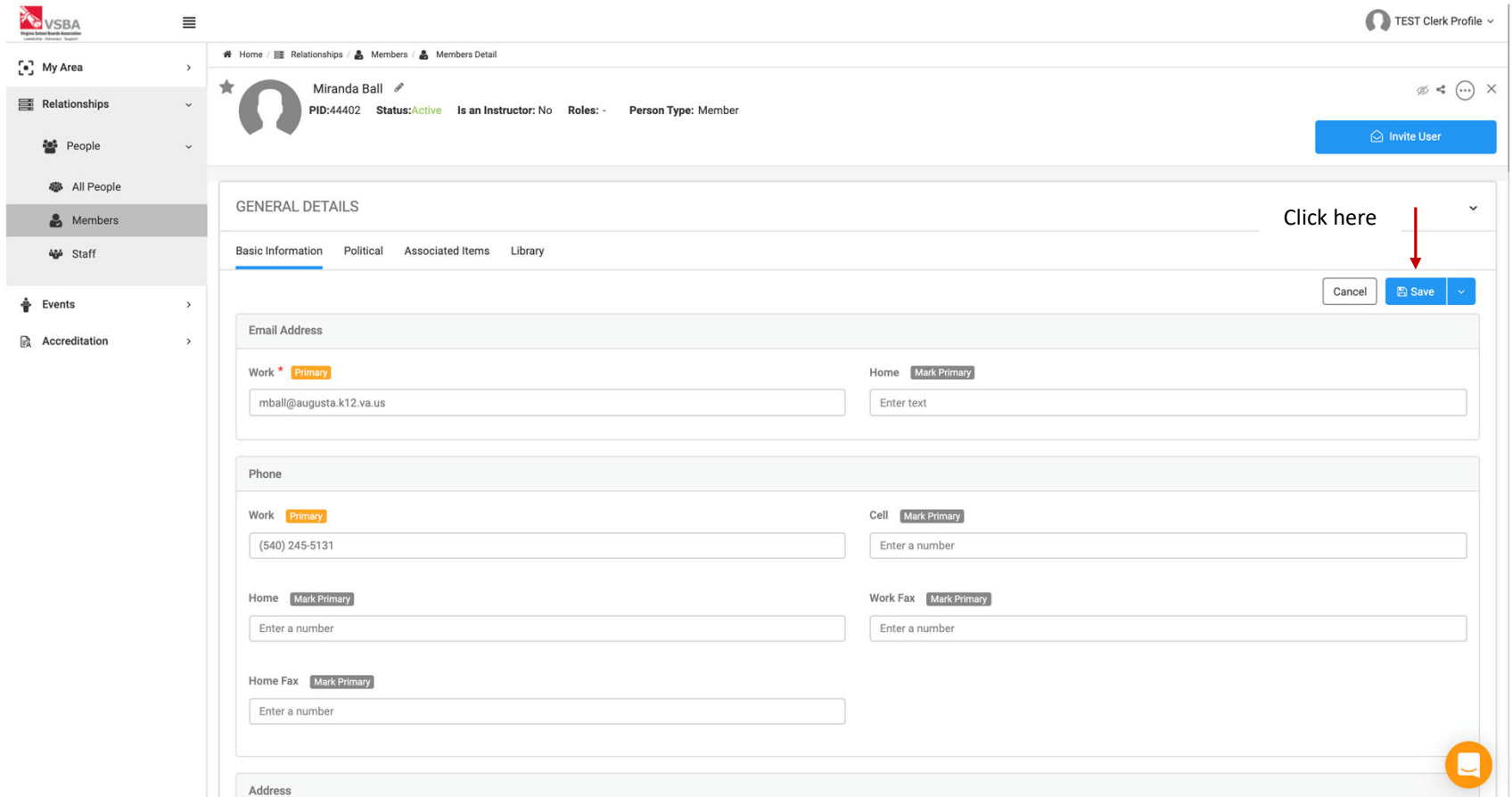
MEMBER DETAILS

Classes


CLASSES

Favorite	Status	Classes	Class Type	Class dates	Completion Date	Tags

Select the “save” tab to save all updated information for your member.



The screenshot shows the VSBA Members Detail page for a member named Miranda Ball. The page includes a navigation sidebar on the left with options like My Area, Relationships, People, Members, Staff, Events, and Accreditation. The main content area displays the member's profile information, including PID:44402, Status:Active, and Person Type: Member. Below this is a 'GENERAL DETAILS' section with tabs for Basic Information, Political, Associated Items, and Library. The 'Basic Information' tab is active, showing fields for Email Address, Work (Primary), Home (Mark Primary), Phone (Work, Cell, Home, Work Fax), and Home Fax (Mark Primary). A red arrow points to the 'Save' button in the top right corner of the form, with the text 'Click here' next to it. The 'Save' button is highlighted in blue.

**Questions Contact Mikaela
Coffey at Mikaela@vsba.org or
Kim Hodges at
Khodges@vsba.org.**