

# A walkthrough

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Welcome to this tutorial on how to change a user's role in Impact Evaluator. Admins and Owners have the ability to update any user's role within their organization. This feature is helpful when a user's responsibilities change, such as moving from a participant to a coordinator role.

The screenshot displays the Impact Evaluator dashboard. On the left is a navigation sidebar with options: My Dashboard, Users, Programs, Groups, Reports, and Analytics. The main content area features a top header with 'Credits Remaining: 32' and a user profile for 'Demo Owner' (Impact Demo Nonprofit Owner). Below this is a 'Demo account used for training purposes' section with '+ Participant' and '+ Program' buttons. A user profile card for 'Demo Owner' (david@demo-owner@flipsideup.net) includes 'Users' and 'Edit Profile' buttons. To the right, a statistics panel shows: Total Managers (1), Total Coordinators (1), Total Participants (4), Total Groups (2), and Number of Programs (5). At the bottom, a 'Participants' section is partially visible.

Welcome to this tutorial on how to change a user's role in Impact Evaluator. Admins and Owners have the ability to update any user's role within their organization. This feature is helpful when a user's responsibilities change, such as moving from a participant to a coordinator role.

2 To begin, click on Users in the left menu.

The screenshot shows the 'Users' page in the Impactevaluator application. The left sidebar has a menu with 'Users' highlighted. The main content area displays the profile of 'Demo Owner' (Impact Demo Nonprofit Owner) and a summary of system statistics:

Category	Count
Total Managers	1
Total Coordinators	1
Total Participants	4
Total Groups	2
Number of Programs	5

To begin, click on Users in the left menu.

3 From here, navigate to the tab for the category of user you want to update. In this demo, we'll start on the Participants page to change a participant's role.

The screenshot shows the 'Participants' page in the Impactevaluator application. The 'Participants' tab is highlighted in the top navigation bar. The page displays a table of participants with the following data:

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy, Self Evaluation, Fun Practical Maths	16	10	●	ⓘ
Kate Doe	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	ⓘ
Kayla Botha	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	ⓘ
Madison Paige	Demo Group 1, Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	ⓘ

From here, navigate to the tab for the category of user you want to update. In this demo, we'll start on the Participants page to change a participant's role.

4

Locate the participant whose role you want to change, then click on their name. A popup will appear with the user's details.

The screenshot shows the 'Participants' page in the Impactevaluator system. The page has a sidebar with navigation options: My Dashboard, Users, Programs, Groups, Reports, and Analytics. The main content area is titled 'Participants' and shows a table of users. The table has columns for NAME, GROUP, PROGRAMS, AGE, GRADE, STATUS, and ACTION. The first row, for 'John Doe', is highlighted with a green box around the name. Above the table are search and filter options: 'Search by Participant Name', 'Filter by Group', 'Filter by Program', and 'Filter by Age'. There are also buttons for '+ Users to Program', '+ Users to Group', '+ Multiple Participants', and '+ Participant'.

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy, Self Evaluation, Fun Practical Maths	16	10	●	⋮
Kate Doe	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	⋮
Kayla Botha	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	⋮
Madison Paige	Demo Group 1, Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	⋮

Locate the participant whose role you want to change, then click on their name. A popup will appear with the user's details.

5

In the popup, you'll see the Change account type option. Click this text.

The screenshot shows the 'Edit John Doe' popup form. The form is titled 'Edit John Doe' and has a 'Change account type' link highlighted with a green box. The form contains the following fields: Picture, First Name (John), Last Name (Doe), Email address (davidbo747+johndoe@gmail.com), Grade (10), Birth Year (2008), Gender (Male), Ethnicity (Hispanic/Latino), Country (United States), State (California), City (San Jose), Groups (Demo Group 1), and Programs (Build a Boat, Curious Minds STEM Club, Future Leaders Academy, Self Evaluation).

In the popup, you'll see the Change account type option. Click this text.

6

A dropdown will appear with all available roles. You can see that this user is currently a participant.

Impact Educator

Participants

Participants

Choose new account type for this user Participant

Picture First Name Last Name

John Doe

Email address davidbo747+johndoe@gmail.com

Grade Birth Year

10 2008

Gender Ethnicity

Male Hispanic/Latino

Country State City

United States California San Jose

Groups

Demo Group 1

Programs

A dropdown will appear with all available roles. You can see that this user is currently a participant.

7

Select the new role for the user—in this case, we'll change the user from Participant to Coordinator.

Impact Educator

Participants

Participants

Choose new account type for this user Coordinator

Picture First Name Last Name

John Doe

Email address davidbo747+johndoe@gmail.com

Programs

Build a Boat Curious Minds STEM Club

Future Leaders Academy Self Evaluation

Fun Practical Maths

Close Save

Select the new role for the user—in this case, we'll change the user from Participant to Coordinator.

8 Once you've selected the role, click 'Save.'

Impactevaluator

Participants

My Dashboard

Users

Programs

Groups

Reports

Analytics

Nonprofit/Educational...

Impactevaluator

Once you've selected the role, click 'Save.'

9 The popup will close, and you'll notice that the user, John Doe, no longer appears in the Participants list.

Impactevaluator

Participants

0 selected

Search by Participant Name

Filter by Group

Filter by Program

Filter by Age

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
Kate Doe	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	🗑️
Kayla Botha	Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	🗑️
Madison Paige	Demo Group 1, Grade 10 Group	Curious Minds STEM Club, Self Evaluation, Fun Practical Maths	16	10	●	🗑️

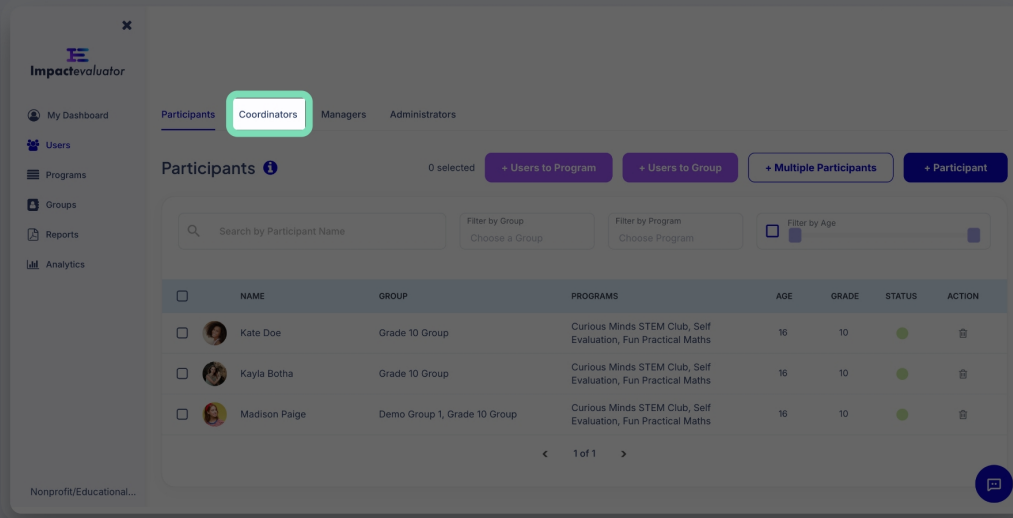
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Impactevaluator

The popup will close, and you'll notice that the user, John Doe, no longer appears in the Participants list.

10

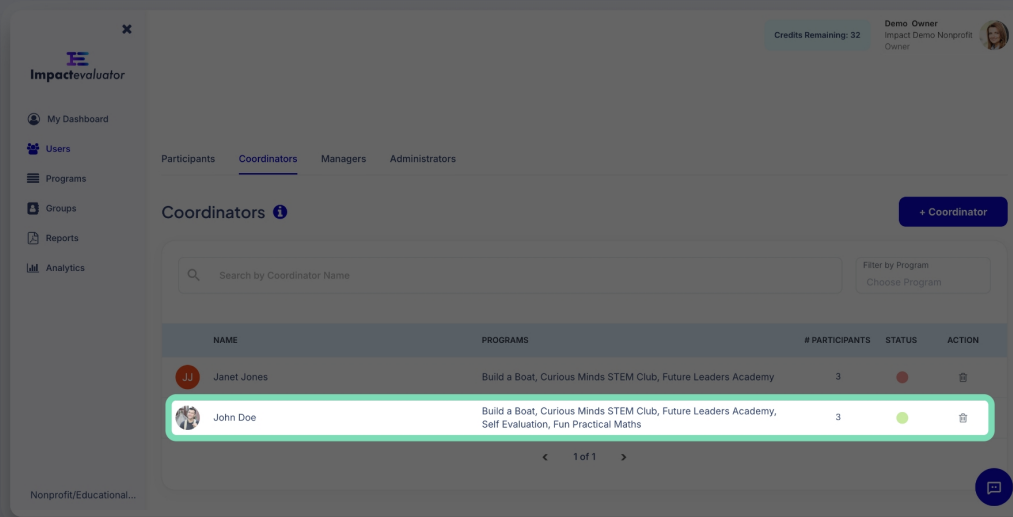
To confirm the role change, go to the Coordinators tab in the top menu.



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11

Here, you'll see John Doe listed as a Coordinator



Here, you'll see John Doe listed as a Coordinator

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And that concludes this tutorial on changing a user's role in Impact Evaluator. Thanks for watching.

The screenshot displays the 'Coordinators' management page in the Impact Evaluator application. The page features a sidebar on the left with navigation links: My Dashboard, Users, Programs, Groups, Reports, and Analytics. The main content area has a top navigation bar with 'Credits Remaining: 32' and the user profile 'Demo Owner'. Below this, there are tabs for 'Participants', 'Coordinators', 'Managers', and 'Administrators'. The 'Coordinators' tab is active, showing a '+ Coordinator' button and a search bar labeled 'Search by Coordinator Name'. A 'Filter by Program' dropdown is also present. The main content is a table with the following data:

NAME	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
Janet Jones	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	3	Red dot	Trash icon
John Doe	Build a Boat, Curious Minds STEM Club, Future Leaders Academy, Self Evaluation, Fun Practical Maths	3	Green dot	Trash icon

At the bottom of the table, there is a pagination indicator showing '< 1 of 1 >'. A chat icon is visible in the bottom right corner of the main content area.

And that concludes this tutorial on changing a user's role in Impact Evaluator. Thanks for watching.