

1.1: Introduction and Main Menu

Hello everyone, this is Steve from Lamplight. Welcome to Lamplight basic training starting with introductions to the main menu, homepage and diary.

This short video is an introduction to the main menu and search function.

You can also download a transcript of these videos if it's helpful for you, so you can read along. You can pause the video at any time and try what we've done in your own system or our test system. We'd encourage you to do this regularly during the video – after all you can pause as often as you like. We've found practice and building muscle memory are by far the best ways of learning.

In this video we'll be looking at navigation on the home page in Lamplight. This will include the main menu and the search box.

In the next video we'll look at the home page tabs and the diary tabs, and how to customise your home page.

First, we'll look at the main menu.

Main Menu

The main menu bar shows you the different sections in your Lamplight system. This is the coloured bar towards the top of the screen, in our system it's green. You'll see the options we have are Home, People, Work/Activity, Groups, Reports and Admin. In your own system, although the names may be different, they will still do the same thing. The most common change is for groups to be renamed 'Lists'.

When you click on any of these menu options, you will see new options appear directly below in the menu bar itself. If you click on one of these new options one of two things will happen. With some, you'll go right to a new page. With most you'll see a drop-down list appear for you to choose from.

Some of these options have another level of menu. For example, if you click on people, a range of options appears. When you choose View, you will see a drop-down list with triangle arrows against each option. Hover over the option you want, and you'll see a final pop-out menu appear for you to select from.

Why not pause the video, and take a moment to try this in your system?

Once you have tried it, click on the 'Home' option in the main menu at the top of the screen to bring you back to your home page. These menu options are always found at the top of the screen whatever you're doing and are your key method of navigating.

Searching

At the very top right of the Lamplight screen you'll see a grey search box with 'search profiles or help' written in it. A profile is the individual entry for any person or organisation you know and have entered into Lamplight. This search box is the easiest way to find a profile, or to get help.

Start typing a {{person}} or {{organisation}}'s name in the search box, and as soon as you've typed the first three characters, a list will appear with the first 10 matches. You can keep typing to narrow down the options to the one you want, and then click to select the profile you want. The drop-down list searches for names, postcodes, email addresses, and ID numbers.

You can also run a full search by pressing the 'Go' button. This runs a full text search of the system and as well as names, it will look for information such as part of a phone number, or something mentioned in record notes.

You can also search for help. Pop your query in the search box and hit the 'Help' button. You'll be taken to a new window with a list of search results. From this page you can also see the contents of the whole help manual and download it if you want to.

We suggest you take a short while to repeat what you've learned in your own system, referring back to this video if useful. Keep rolling for an introduction to the diary and homepage, otherwise thanks for taking this training video.