Welcome to an introduction to the homepage and diary. This is video 2 of 2 of the Introduction to Lamplight group.

Let's look at your homepage.

On many pages within the system there is a secondary menu, which we refer to as 'tabs' or the 'tab menu'. You'll see this on the homepage, underneath the words 'Welcome to Lamplight'. You'll see a number of different tabs depending on your system set-up, and each of these has different information. These may include 'My Diary', 'Diary', 'My Users', 'My Tasks', and 'Recently viewed profiles'. You can choose which tab appears first on your homepage, and we'll show you how to change this at the end of the video.

Let's look at each of these now.

My Diary

The 'My Diary' tab shows you the work that you are involved in for the current week.

By default the diary is coloured according to the different areas of work you do, and shows a 7 day view. It works in the same way as other online diaries you may have come across. You can add a new piece of work by clicking and dragging at the time you want to choose. You can also drag and drop existing items to change their time and date, and you can open a diary item from here to see the details. We'll show you how to do this later.

The small grey buttons in the top right of the diary section allow you to move left and right by week, move to a particular date, come back to today, and change to a monthly view. Clicking on the coloured bar at the top of any day in the diary will also take you to a daily view. Take a moment to pause the video and see how they work.

Today is marked in the diary by thin black lines either side of it.

If you look beneath the diary, you can see on the right-hand side the different areas of work you do. The diary is colour coded by default by work area. You can choose to show or hide different areas of work by ticking or unticking the box next to each area. Just below this, you can also see a list of the different locations you work in. By clicking on the circle next to '{{workarea}}' or

'location' at the bottom of the list, you can choose to colour your diary by the location of your work, or by work area.

On the left hand side beneath the diary, you can also choose to show different types of work or tasks, which we'll talk about shortly.

Beneath this, you have two options. One button, 'Save settings', saves any changes you make, so that your diary will look this way each time you return to the page. This will only affect you, and not anyone else. The 'Print diary' button opens in a new window, and gives you a print-friendly agenda for the week.

Diary

Another tab you will see is simply called 'Diary'. This works in exactly the same way as 'My Diary' but shows you the work which everyone in your organisation is involved in. You can use this to see what activities are happening, and if you are using locations, where they are happening.

If you look underneath the diary to the right, you will see one additional option in this page that wasn't in the previous one. This shows you a list of all the staff in your system and allows you to choose whose work you see in the diary by ticking or unticking the box next to their name. In a small team you may wish to show everyone, but if you work in larger teams, you may wish to show only a smaller group that you work with. Once you have arranged your diary to your satisfaction, remember that you can click 'save settings' to the bottom left of the page, so that the next time you open the 'Diary' tab it will have kept these settings.

Recently viewed profiles

On this system we have three other home page tabs. The first of these is 'Recently viewed profiles'. If you select this tab, then Lamplight will show you a list of the last 10 people or organisations you have viewed. This is great for adding records to those short-term repeat clients.

My Clients

The next tab is 'My clients'. This might be called something slightly different on your system, such as 'My service users', or 'My caseload'. If there are people that you are working with on a regular basis, for example you are their key worker, you can set them up with a relationship to yourself of 'my user' (again, this might be called something slightly different in your system) and then they will appear in this list on your home page. You can view some

information about them on this page, and by clicking their name, you can then go straight to their profile.

Although called 'My clients', you can actually add any profile you like to this including organisations, volunteers or funders, depending on the types of profile you have in your system.

My tasks

Finally on this page we have the 'My tasks' tab. Again, this may have a different name in your system. A task is a reminder or action which you can set for yourself, or another member of staff, and it will show in the profile of whoever it has been assigned to.

From here you can see a list of your existing tasks, as well as setting up new ones for yourself or others. If you have an empty row in your table, you can enter a new task directly into it. To add more tasks, just click on the 'add row' button at the end of any row. This will bring up a new row for you to add a task in.

You can fill in the details of the task, then assign it to yourself, or any other person in Lamplight. When you have finished, you must make sure to save it. It will also appear in your diary, or the diary of the database user you have assigned it to, at the time and date you specify. Once you have finished a task, simply add in the completion date, save it again, and it will be sent to your 'complete tasks' list. You can also add tasks when you enter a piece of work. We'll look through tasks in detail as we discuss work records.

Customising your tabs

It's possible to choose which tabs you see on your home page, and to choose the order in which they appear, and which is the default page when you open Lamplight. To do this you will need to go to the coloured menu bar at the top of the screen and click 'admin', then underneath that in the menu bar choose 'system administration'.

What you can see on the next screen will depend on what level of access you have to the system, but everyone will have a section which says 'Customise Lamplight'. Once you've found that box, select 'change my personal settings'. The page you see here has lots of different options for customising how you see Lamplight. Any changes that you make here will only affect what you see, and will not affect others who use your system. For now, all we want to change are the home page tabs, and these appear at the top of the page. To

choose which ones you would like to see on your home page, tick the ones you want and leave any that you don't want unticked. You can also change the order they appear in by dragging and dropping them to new positions in the list using the left mouse button. Once you have made any changes you want, don't forget to go to the very bottom of the page to save your changes. Saving your changes is always important in Lamplight. Click F5 to refresh your system and you'll see the changes in your Homepage tab.

If you want to you can carry on to the next set of videos about profiles, otherwise thank you very much for joining us.