2.3: Custom Tabs and Fields in Profiles

Welcome to An Introduction to Profiles, video 3 of 4, Custom Tabs and Fields.

We're looking at profile tabs. In the previous video we looked at the 'Contact details' tab. The next one is likely to be 'Relationships' which we'll come back to in a later video.

The next tabs are likely custom tabs, which contain information about people that's unlikely to change often, and which can be overwritten when you do need to change it, such as demographic details. It will be about the person or organisation themselves, rather than about what you do with them.

These tabs are unique to your system and contain information that your organisation needs for your work or reporting.

We have a few tabs in this system, containing examples of the types of fields you might come across. I'll show you some now, and then I'll ask you to try them in your system.

Personal and Other Tabs

As well as simple text fields (which we saw in the contact details tab) we have many other options for entering data. We'll start with our custom tab, called 'Personal'. You may well have one of the same name, but the contents might differ.

Click the 'Edit tab' button to the right. You'll see we have various fields in which to enter data.

Date Field

In *our* 'Personal' tab, the first is a date of birth field. Either click the drop-downs for the day, month and year, or use the calendar icon to the right. If you click on the calendar icon, you can either scroll through the months using the arrows at the top, or click on the month and year, and pick a date.

Select Field

The second field, 'Gender', is a single select field. Click where it says 'Select' and choose one of the options by clicking it. If you have a long list, you may need to scroll down.

Multi-Select Field

'Disabilities' is a multi-select field. Again, you will need to scroll down to see longer lists. You can select a single option just by clicking it. To select more than one, click while holding down the 'Ctrl' key in Windows, or the 'Cmd' key on a Mac. You can hold down the same key and click again to deselect an option. To select a consecutive range, either click and drag with your mouse or click the top item, hold down the 'shift' key, and then click the bottom one.

If these techniques are new to you, why not pause the video, and take a moment to try them? You'll find they are useful in other applications too!

Checkboxes

The field 'Signed behavioural agreement', is a single checkbox. Simply click it to tick it.

The 'Allergies' field uses multiple checkboxes. You can select or deselect multiple boxes simply by clicking each one.

Radio Buttons

The 'sexual orientation' field uses radio buttons. With radio buttons, you can only choose one option, so simply select the one you want. Like checkboxes, some radio button fields may only have one option which you simply click to select.

Other Fields

The field 'Year started high school' is a Year select field. Click to open the list, and then click the correct year.

The Twitter and Website fields are just text boxes. Once saved, you'll see links to those sites.

Text Fields

Under 'Contextual Information', there are two types of text field. A text *box*, which lets you enter a small line of text, and a text *area*, into which you can type more. The text area can be resized by clicking and dragging the bottom-right-hand corner.

Saving

Once you've finished populating fields, you must remember to save. If you navigate away from the tab without saving, you will lose everything you've done. New users sometimes worry about this, but in fact it soon becomes second nature. Learning to save comes with a high incentive, so people learn quickly!

Repeating Fields

Now that you've saved the information in this tab, we'll look at another type of field that you might come across—repeating fields.

To show you this, I'll navigate to the profile of a funder using the search bar.

In funder profiles, we have a tab called 'Funder Information', in which there is a set of repeating fields. These allow you can enter information into the same fields more than once and presents them as rows in a table. We don't use these very often as you can only report on them under certain circumstances, but they work very well for displaying information on screen.

You can identify repeating fields by the table header, and the extra 'Add' button over to the right. They're edited separately to the rest of the tab, by clicking 'Add'.

Populate the fields, click 'Save', and when the tab reloads, you'll see the data in their own row in the table. To add another set, repeat this process. Each time, a new row will be created, and you can add more as needed.

Next Tabs

Now you've seen the types of fields available in Lamplight, take some time to explore your custom tabs. If you've been following along with this video series, complete the custom tabs in the service user profile you created in video 2.1. When you reach a tab called Tasks, Waiting Lists, or Referrals, stop. We'll cover these in a different video.

Watch our next video to learn about relationships. Thanks for watching!