2.4: Relationships

Welcome to An Introduction to Profiles, video 4 of 4: Relationships.

Relationships are a way of linking profiles to show their connections. They can link person to person, person to organisation, or organisation to organisation. There can be relationships between parents and children or clients and keyworkers, for example. It can be useful to show which other organisationss are supporting which of your users. You might record relationships with GPs, social workers, or others.

It's a good idea to check the person or organisation that you want to link to has a profile in Lamplight before you start this process.

To create a relationship to a person, go to the 'Relationships' tab in their profile (as always, it is possible that it is called something else in your system, or you might not have relationships enabled at all). From here, click the 'Add' button to the right.

In the pop-up window, use the 'Find people' search field to search for the person or organisation to which you'll record a relationship.

Once you've selected them, click the 'Relation' drop-down list and choose the type of relationship.

GP relationship
Hillside Surgery
Dr Watson

Types of Relationship

Add any notes you may need and click 'Save'. You'll see the relationship appear in the table.

You can see that relationships can be two-way. In this system, Mentor (Mentee) is two-way. This means that one person is the mentor, the other the mentee.

I'm going to add a mentor/mentee relationship with another user. When I save, this profile is shown as the Mentee, which is incorrect. To reverse a relationship, left-click the menu icon or right-click anywhere in the row to view the contextual menu, and click 'Reverse'. You can see that the relationship has now been inverted.

Clicking a name in the relationships table, will take you to that profile, making the 'Relationships' tab a useful directory of those associated with a profile.

Viewing Relationships

The table shows all current relationships. You can sort it by left-clicking the column headers.

The contextual menu offers more options for each relationship:

- 'View full details' opens that profile.
- 'Edit' lets you change the relationship details.
- 'Reverse' changes the direction of a relationship, as we've just seen.
- 'Close relationship' marks the end of the link between profiles.
- 'Communicate' is an option you'll see if you have the Communications Module, and lets you address a communication to that profile.
- 'Copy address' let's you copy address details from the selected profile to the contact details tab of the profile you are in. It can be useful to copy details from a parent to a child's profile, for example.

Viewing Relationship History

To view a full history of open and closed relationships, click the 'View history' button. This shows you all past and present relationships, and when they started and finished. Click the 'View current' button to return.

Now that you've seen how relationships work, I encourage you to pause the video and take a few moments to try them out.

Before we finish, I'll give you a few extra pieces of information about relationships.

The 'My User' Relationship

The first relationship in your list is likely to be 'My User' (as always, it may be called something else in your system, such as 'my client', or 'caseload').

You can link your profile with any other, and it will then appear in the 'My Users' tab in your homepage. Some organisations use this for keyworker relationships and others simply use it for quick access to profiles. You can use the contextual menu to close a relationship from here.

Default Contacts

When you create a relationship, you might see a 'Default contact' option. Default contacts are very powerful, and if you use these in your system, see our video on the subject.

Adding Profiles from the 'Add Relationship' Dialogue

We've linked existing profiles, and in some systems you'll be able to create profiles through the relationship dialogue. Depending on how your system has been set up, when you try to create a relationship to a person without a profile, you may see a message asking, 'Do you want to add this as a new profile?'' If you click 'OK', this will create a basic profile.

It's important to remember that this new profile will be a 'person' and a 'user'. If it should be an organisation, or have another role, you'll need to change this in their profile afterwards. Many systems won't allow you to create new profiles in this way to avoid this issue.

Trying It Out

Now that we've looked at the first set of profile tabs, if you've not already done so, take some time to create profiles of each type, and try linking some of them with relationships.

Watch the next series to learn about Referrals. Thanks for watching!