4.1 Creating a Work Record

Hello, it's Max from Lamplight. Welcome to Work Records, video one of four: Creating a Work Record.

Work Records are the way to record the work you do. As with everything in Lamplight, they may be called something else in your system. If you click 'Activity > add new', you'll see a list of activity types. The top one will be work, or whatever alternative it's called in your system.

You can create a work record from the main menu, using 'activity > add new > work', but we're going to create one through the profile of the person with whom we worked.

In their profile, click to select the 'Work records' tab, and then click the 'add' button to the right. This pop-up window is where we will enter the details of the work. There might be many custom tabs and fields for recording different types of work, and we'll use just the ones that are relevant.

These first three tabs are found in any system, and you'll want to populate them every time. They are:

- When and where
- Attendance
- Details

Let's look through them together.

When and Where

Date and Time

Every piece of work has a start and end time, and these will be used to display work records in the home page diaries. They'll also be important for reporting purposes.

Select your start time, and the end time will automatically change. The default length of work records has been set by your system administrator. If it's incorrect, change the end time manually. Next, set the date. Unless your piece of work runs into the wee hours or includes an overnight stay, the 'to' and 'from' dates will be the same.

It is possible to set work records to recur, and we'll cover recurring records in the third video in this series.

Workareas

When you create a work record, you must select one workarea, and you might normally choose one or more subworkareas too. These are essential as they categorise your work, so that you can easily sort through and report on them.

Your workareas, and how they're designed to be used, are specific to your system, and using them properly will be crucial for your reporting as well as day-to-day record-keeping. If you're not sure which to use, speak with your System Administrator.

Location

As well as a workarea, you may select a location. These let you view activities by location in the diary, and allow reporting based on where things have happened. If you don't have locations available, just continue.

Custom Fields

Now, in any of the tabs, there may be additional, custom fields. I'll show you some examples of these in a moment, but yours will be different. Fill them in where they are relevant and seek the guidance of your System Administrator if you need to.

When you've completed a tab, navigate to the next one either by clicking the tab name at the top, or clicking the 'Next' button in the bottom right corner. If you click 'Next' to move to a shorter tab, you may need to scroll up to see the next one.

Attendance Tab

Next is the attendance tab, in which we'll record everyone who attended, including users, staff, volunteers, and other professionals. This will allow us to look back and see who was involved, and to report on different people's involvement. It will also appear in the 'work records' tab of anyone included in the attendance table, so you can see in each profile a list of everything they've been involved in.

Search

If you created the work record from a profile, that person or organisation will already be listed and, depending on your personal settings, you may be listed too. To add more names to the attendance table, use the search box at the top of the page. When a name appears in the search results, click it to add it to the table. Do the same for another client [Claudia Cregg], a contact [Darius Hawthorne], and perhaps another member of your staff [Peggy Carter]. You can also include organisations [Topnotch Social Services].

Attendance

You'll now see their names in the table. The 'Attendance type' column displays whether they attended. Click within this column to view the list of options. These are specific to each system, but you'll likely have a number of these: Attended, Did not attend, Cancelled.

Many systems use an attendance type such as 'In reference to', so that the work record will appear in that profile. For example, this could be used to record a meeting about a user where the user is not actually present.

Role

As well as an attendance type, every attendee has a role. This means that, for example, someone who both uses services and volunteers can attend in either capacity. Clicking in the 'role' column, will display the list of roles. Click the relevant role from the list.

Anonymous Attendees

The box below the attendance table is for recording anonymous attendees. If you didn't take names, use this to record a number. Be mindful that, if you use this feature, you will not be able to accurately report on the number of individuals attending work records, because you won't know whether you're double-counting those anonymous individuals.

Details

Next is the 'Details' tab.

Summary

The text you enter in the 'Summary' field is what'll appear in the diary, so make it succinct. Think of it as the subject line in an email.

Placing the cursor in the field will usually reveal rich-text editing tools, which provide formatting options. To close these once you've finished, click the cross in the top, right-hand corner.

Description

The ‘Description’ field is where to enter notes from the session. If you’re creating a record for an event in the future, you may want to leave it blank, to complete later.

Follow-up

The ‘Follow-up’ field is to record what needs to happen following the session. You may not need to use this.

Saving

At this point, you can save your work record by clicking the ‘Save’ button in the bottom, right-hand corner. If you’ve created the record from a profile, as I have, you’ll see it in the table in the ‘Work records’ tab. We’ll look in more detail at this table later in this series.

I suggest you take a short while to practice what you’ve learned in your own system. In the next video, we’ll look at custom tabs and fields in work records. Thanks for watching.