4.2: Custom Fields in a Work Record

Welcome to Work Records, video 2 of 4: Custom Tabs and Fields in Work Records.

A work record is a common place to have custom fields. In our system, we have two drop-down lists, and a small text box. You may have other fields here, or in another tab. If you have questions about using different types of field, see video 2.3: Custom Tabs and Fields in Profiles.

The first three tabs are the basis of every work record, and at this point, you would often save and be finished. But as work records are templates for any type of work you do, you may sometimes need to use custom fields to enter more information.

We'll save this work record by clicking 'Save' in the bottom-right-hand corner. It's now shown in the table in the 'Work records' tab. We'll look at how this table works in a moment, but first, we'll create one more work record, which makes use of custom fields.

Additional Tabs

I'll navigate to a volunteer profile using the search bar, and go to the 'Work records' tab. I'm going to create a work record for a volunteer support session we had earlier today, by clicking the 'Add' button.

Volunteer Gwen Cooper
WA 'Volunteer Process'
SWA 'Volunteer Support'

I'll complete the first three tabs, as I would with any work record.

I'll enter the time and date, choose the appropriate workarea and subworkarea, and complete any other fields needed, such as location, before clicking 'Next'.

In the 'Attendance' tab, I'll make sure Gwen and I are there, with the correct roles, and complete any custom columns in the attendance table. When I've done this, I'll go to the details tab.

Here I write a summary (a brief heading for the diary), and any other fields I need. I'm going to enter brief notes about the session.

Description: Gwen happy, enjoying support, all well

‘Volunteer Support’ Tab

Now, I go to my custom tab, called ‘Volunteer support’.

This tab and its fields are unique to our system, but you may have custom tabs and fields in work records in yours.

It consists of a series of check-boxes with which to record the topics we covered. I’ll use this tab for entering details of a volunteer support session, and simply ignore it when recording a different type of work.

I’ll complete the tab, and once I’ve finished, I’ll click ‘Save’.

You may also have a variety of tabs relating to modules in your system, such as ‘Media’, ‘Expenses’ or ‘Charging’, and you may also have a ‘Tasks’ tab. We’ll cover each of these in their own video.

Take a moment to look at your system, identify any custom tabs and fields, and consider for which types of work you’ll use each.

In the next video I’ll introduce recurring work records. Thanks for watching!