4.4: Viewing and Editing Records in a Profile

Welcome to Work Records, video 4 of 4: Viewing and Editing Records in a Profile.

The work records tab of a profile shows a table of the work records this person or organisation has attended. This can be thought of as the journey someone has taken through the work they've done with you.

In the leftmost column of each row in any table is a small grey box with three lines in. Left-click it (or right-click anywhere in the row) to view the contextual menu. Some options in this menu are only available to some database operators—speak to your System Administrator if you've any questions about this.

Let's go through the contextual menu options.

Firstly, we have 'View full details'. Clicking this will display the details of the record in a popup window for reference. Following the arrow to the sub-menu allows you to choose a group data view to use with the attendance table, so you'll see the same pop-up, but the attendance table displaying the details chosen in the group data view you've selected. See our video on groups and group data views for more on this.

Secondly, we have 'Edit'. This opens the selected record for you to amend or complete. You can also edit a whole series of recurring records in one go.

Thirdly, we have 'Delete'. This deletes the record completely.

Next, we have 'Duplicate record'. This creates an exact copy, and it can be a useful way to create a record that is similar to one you've already created. You'd create a duplicate of the existing one, and then change the necessary details.

The next few options all relate to cases and communications, and we'll cover these in the videos relating to those functions specifically.

The 'Add outcomes' option creates an Outcome Record using the same time and date, workarea and attendance table as the Work Record you've started from. This can save time and repetition if you obtained outcome data during a work session and need to record them both.

Why not take some time to enter a few work records for yourself? Remember to always complete the first three tabs of each record, and then use the other, custom tabs as appropriate.

You can create work records from the ‘Work records’ tab of a profile, or through the main menu, using activity > add new > work. If you’ve yet to record a referral, why not create one referral record and several work records for one of your clients.

That brings us to the end of the video series on work records. The next series will be on Outcomes. Thank you for watching.