

Creating Groups/Lists and Data Views Using Activity Records

Introduction

Groups and Lists are the same thing in Lamplight – organisations choose which term suits them.

They can be used to answer ‘Who?’ type questions. For example, ‘Who attended our under 25s drop-in in 2021?’

Data views can then be used to add information to the list you have created – for example the dates of the sessions attended.

Who is this for?

People who have some experience of creating groups, but would like to understand how to use activities records, such as work, outcomes and referrals. These can be used alongside fields from profiles to filter your groups – for example, finding female service users living in Bolton who were referred this year and have attended a self-support session.

What is covered?

- ⚙ The different types of group in Lamplight – auto, manual and merge
- ⚙ Creating a group using information from work and referral records
- ⚙ Using outcome records to filter your group
- ⚙ Creating an advanced merge group
- ⚙ Recap on viewing members of groups – in popup and using a data view
- ⚙ Creating a data view using activity record information
- ⚙ Using data views for profile headers
- ⚙ Using a data views for attendance tables

N.B. If you want to cover how to use profile fields to filter your group, this is in the ‘Creating Groups/Lists and Data Views Using Profile Details’ session. If you have not created any groups before, we would recommend the ‘profile data’ as a first step.



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