

Creating Groups/Lists and Data Views Level 1

Using Profile Information

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 are the men with support needs aged 25 35?'

Data views can then be used to add information to the list you have created for example contact details, date of birth etc.

Who is this for?

People who are new to creating groups in Lamplight, or who have used existing ones but not created their own.

Examples of when these groups can be used in Lamplight would be to create mailing lists based on consent received, or to identify service users with specific support needs, for example. This will depend on the information stored in your system.

This session will cover:

- ⚙ When to use a group
- ⚙ Introducing auto, manual and merge groups
- ⚙ Creating an autogroup based on profile information
- ⚙ Working with your group
- ⚙ Understanding information in the groups table
- ⚙ Viewing group members in popup
- ⚙ Using a data view to add information to your group
- ⚙ Introducing data views
- ⚙ Creating a data view using profile information
- ⚙ Using a data view to create a summary page on profiles

N.B. If you want to cover how to use activity records (work, referrals, outcomes etc.) to filter your group, this is in 'Creating Groups/Lists and Data Views Level 2: Using Activity Records'. However, if you have not created any groups before, we would recommend this Level 1 session as a first step.

