People: Adding a new profile field

Requirements

This user guide is for anyone on Claromentis 8.2+

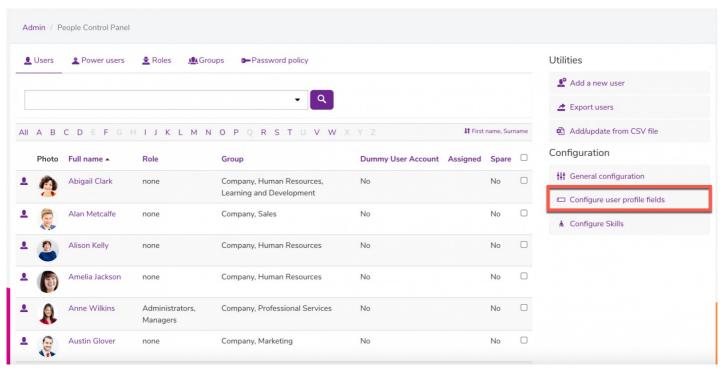
Overview

In this article, we will look at creating a new field or metadata to be added to a user's profile. We can determine where this field will appear as well as define who may be able to see the field.

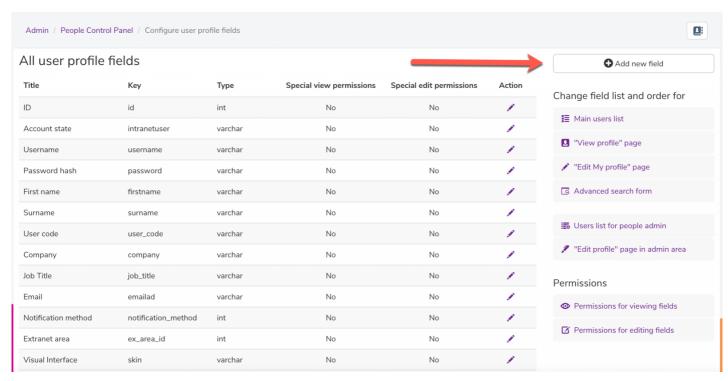
The information below is outlined in the video.

Add a new profile field

Navigate to Admin > People, select 'Configure user profile fields'.

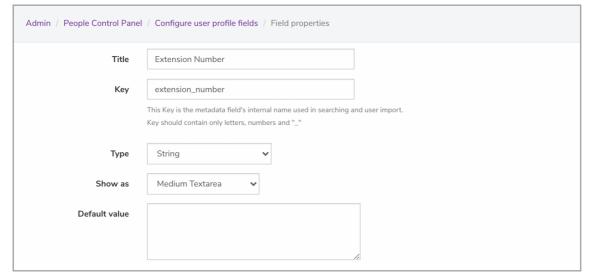


Select the '+ Add new field' option:



This field can be anything you deem useful to add to a user-profiles. For example, this could be an extension number field to allow users to contact one another in an office environment.

In the first section, you will be required to fill out the following information.



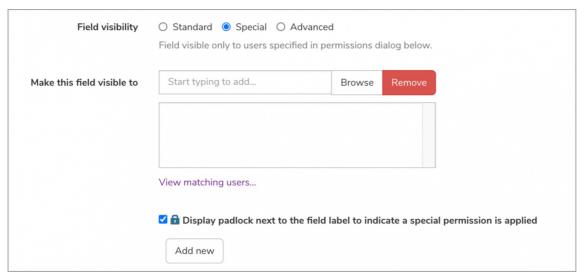
- Title: Name of the field that will appear in user profiles.
- Key: The metadata field's internal name used in searching and user import Key should contain only letters, numbers, and "_"
- Type: The field type that will enable you to have a variety of different content added to a user-profiles. This can be a standard text line, a date field, or an area to upload an attachment
- Show as: The secondary setting you can choose as per the selected field type.
- Default Value: By default, the content will display as specified.

In the second section, you will be required to configure the following by checking the relevant boxes:

| | ☐ Repeatable ☐ Visible even if no value ☐ Mandatory |
|-----------------------|---|
| Display this field on | □ "View profile" page □ "Edit My profile" page |
| | □ "Edit profile" page in admin area □ Main users list |
| | Users list for people admin |
| Field visibility | Advanced search form Standard Special Advanced |
| | No permissions, usual field visible to everyone according to configuration. |

- Repeatable: Field can be entered more than once.
- Visible even if no value: Field name will always display even when there is no information entered.
- Mandatory: Field will be required to be entered by users.
- "View profile" page: Field will be visible in user-profiles on the front-end of the application.
- "Edit My profile" page: Field will be editable on 'My Profile' from the front-end of the application.
- "Edit profile" page in admin area: Field will be editable on 'Edit profile' from the admin side of the application.
- Main users list: Field will be visible in the main list of users from the front-end of the application.
- Users list for people admin: Field will be visible in the main list of users from the admin side of the application.
- Advanced search form: Field will be visible and searchable when performing an Advanced Search.

In the last section, you will be able to determine the permission/visibility of these fields:



- Standard: No permissions, usual field visible to everyone according to configuration.
- Special: Field visible only to users specified in permissions dialog.
- Advanced: Make the field visible by certain users for certain users. You'll be able to set permissions after the field is created.

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