

People: Adding a new profile field

Fields that appear on user profiles and across People areas are managed by administrators in Admin > People > Configure profile fields

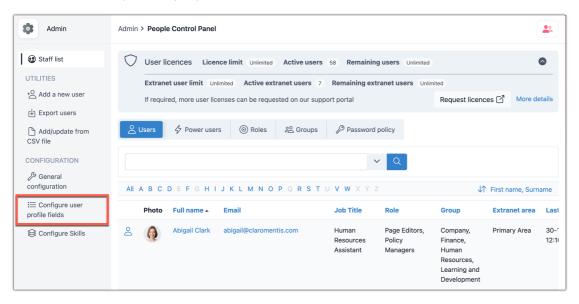
A certain number of fields come hardcoded with Claromentis, such as 'Date of birth, 'City' & 'Job title'.

However, it's possible to add new fields to fit any other data or purpose your company needs, and then choose which areas to display this in.

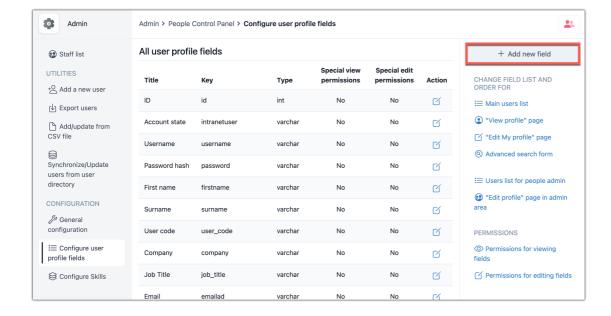
This guide will cover how to create a new field. e.g. 'Extension Number' to be displayed on all user profiles.

Add a new profile field

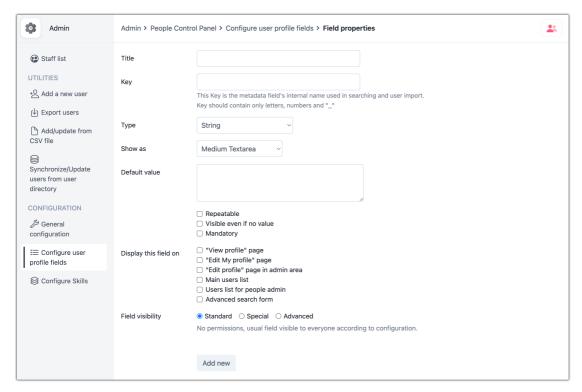
1. Head to Admin > People > Configure profile fields



2. Click the '+ Add new field' option:



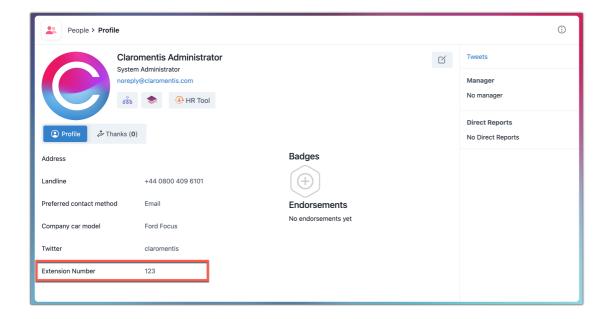
3. Fill out the options for your field purpose



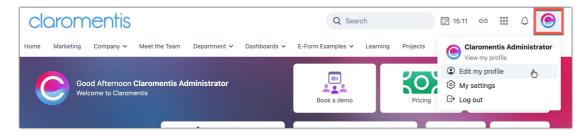
- Title: The name of the field (visible where it is displayed)
- Key: Only visible to administrators. This will autopopulate based on what is entered for the title. It is the database reference for the field and what is used if importing data to it via CSV. The Key should contain only letters, numbers, and "_"
- Type: Select the appropriate field type for the data that will be entered into your field. e.g. A date of birth field is of date type. More information on field types and corresponding data entry to help you make this decision is here.
- Show as: The secondary setting for the chosen type (if applicable)
- Default Value: (Optional) The content entered here will be shown in the field by default.
- Repeatable: Selecting this means an option will appear on the front end, allowing the user to add another of the same field
- Visible even if no value: If selected, the field will always appear in the chosen People areas even if empty.
- Mandatory: If selected, a red asterisk appears next to the field, and it must have data entered in it whenever edited in People areas.

Display this field on (check the box next to the People areas this field should appear in)

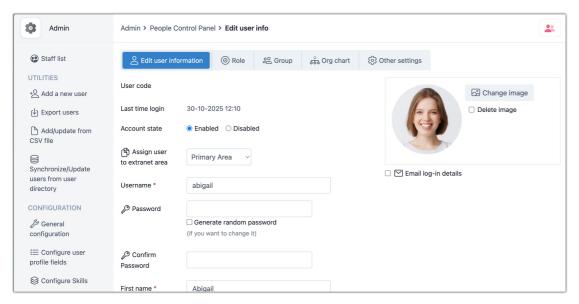
• 'View profile' page: The field will appear on user profiles when viewed from the front end of People.



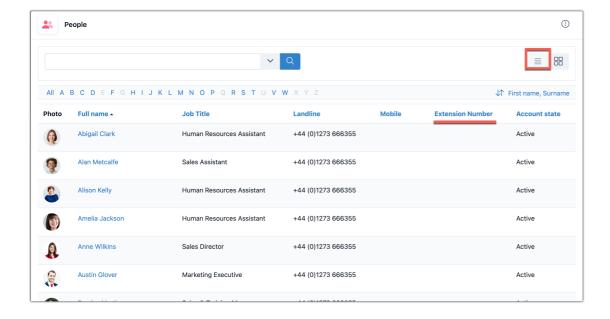
• 'Edit My Profile' page: The field will appear on the 'Edit My Profile' page area that users can open to edit their own profile



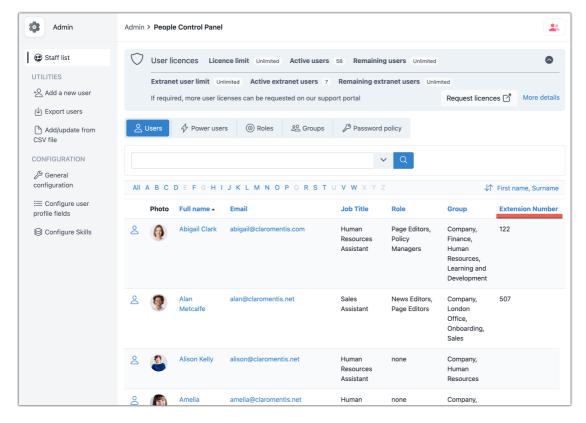
• 'Edit profile' page in admin area: The field will appear on user profiles when opened by an administrator on the admin side



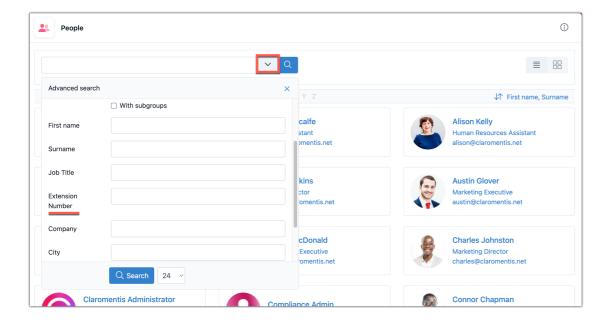
• Main users list: The field will be visible on the front end of People when the 'List' view is chosen by a user.



• Users list for people admin: The field will be visible in the 'Users' tab on the admin side to administrators



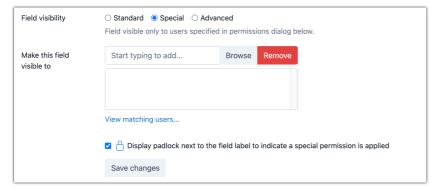
• Advanced search form: The field will appear in the advanced search and can be used in searches (on the front end and admin side)



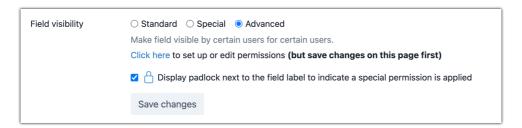
Please note: the order of fields in each area can be changed as well, using the tabs in the 'Configure profile fields' area as detailedhere.

Field visibility

- Standard: No permissions, the usual field visible to everyone according to configuration.
- Special: Field visible only to users specified in the permissions box.



• Advanced: Make the field visible to certain users for certain users.



4. Click 'Save changes' to create the field.

This may take a minute to complete, depending on the number of users on your site, because a reindex is triggered to update the People areas selected with the field.

5. You will be returned to the 'Configure profile fields' area.

Your new field should now be listed at the end of the list and can be edited again by using the pencil icon.



6. Check that the field now appears in the People areas you selected.

Depending on where this was added, users or administrators can enter data into the field to update it.
e.g. for Extension Number, users can update this from the 'edit my profile' area and then everyone can view this on their profile from the front end.
7. Repeat these steps as required to create other new fields and build out the various People areas to your needs.

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