

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'.

The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar and a dropdown menu. A horizontal menu lists letters from A to Z, with a search icon and the text 'First name, Surname'. The main area displays a table of users with columns for Photo, Full name, Role, Group, Dummy User Account, Assigned, and Spare. The 'Configure user profile fields' option in the right-hand sidebar is highlighted with a red box.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare	
	Abigail Clark	none	Company, Human Resources, Learning and Development	No		No	<input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	No		No	<input type="checkbox"/>
	Alison Kelly	none	Company, Human Resources	No		No	<input type="checkbox"/>
	Amelia Jackson	none	Company, Human Resources	No		No	<input type="checkbox"/>
	Anne Wilkins	Administrators, Managers	Company, Professional Services	No		No	<input type="checkbox"/>
	Austin Glover	none	Company, Marketing	No		No	<input type="checkbox"/>

Utilities

- Add a new user
- Export users
- Add/update from CSV file

Configuration

- General configuration
- Configure user profile fields**
- Configure Skills

Select the '+ Add new field' option:



All user profile fields



+ Add new field

Title	Key	Type	Special view permissions	Special edit permissions	Action
ID	id	int	No	No	
Account state	intranetuser	varchar	No	No	
Username	username	varchar	No	No	
Password hash	password	varchar	No	No	
First name	firstname	varchar	No	No	
Surname	surname	varchar	No	No	
User code	user_code	varchar	No	No	
Company	company	varchar	No	No	
Job Title	job_title	varchar	No	No	
Email	emailad	varchar	No	No	
Notification method	notification_method	int	No	No	
Extranet area	ex_area_id	int	No	No	
Visual Interface	skin	varchar	No	No	

Change field list and order for

Main users list

"View profile" page

"Edit My profile" page

Advanced search form

Users list for people admin

"Edit profile" page in admin area

Permissions

Permissions for viewing fields

Permissions for editing fields

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.

Admin / People Control Panel / Configure user profile fields / Field properties

Title

Key
This Key is the metadata field's internal name used in searching and user import.
Key should contain only letters, numbers and "_"

Type

Show as

Default value

- **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
 Advanced search form

Field visibility
 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:

Field visibility
 Standard
 Special
 Advanced
 Field visible only to users specified in permissions dialog below.

Make this field visible to

[View matching users...](#)

 **Display padlock next to the field label to indicate a special permission is applied**

- **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.

Last modified on 28 September 2021 by Veronica Kim

Created on 1 February 2018 by Michael Hassman

Tags: intranet, people, user guide