System Administrator's Handbook

Lamplight

www.lamplightdb.co.uk

Contents

The role of system administrators	**p.4**
Database operators – adding, setting permissions and deleting	**p.5**
Editing workareas and other lists	**p.7**
Adding and editing custom tabs and fields	**p.8**
Merging profiles	**p.13**
Archiving and deleting profiles	**p.14**
Managing outcomes	**p.16**
Creating report templates	**p.17**
Creating activity list templates	**p.18**
Creating communication templates	**p.19**
Editing global settings	**p.21**
Changing personal settings	**p.22**
Uploading profile data	**p.23**

The role of system administrators

Lamplight database operators with a system or project administrator role have permission to make changes to their Lamplight system.

Below is a summary of the main administration tasks that a Lamplight system administrator can perform:

- adding new users to the system, assigning the most appropriate user level, and deleting them where necessary
- adding to or changing the drop down lists that appear in Lamplight
- creating new custom tabs and fields on profiles and records
- setting login and password policies for users
- turning features – such as tasks and cases – on and off in global settings
- creating report, communication and evaluation templates that are accessible to all users
- uploading profile data into Lamplight
- merging and permanently deleting profiles.

Database operators – adding, setting permissions and deleting

System administrators can decide who within the organisation can access the database and decide what they are able to do when they have access.

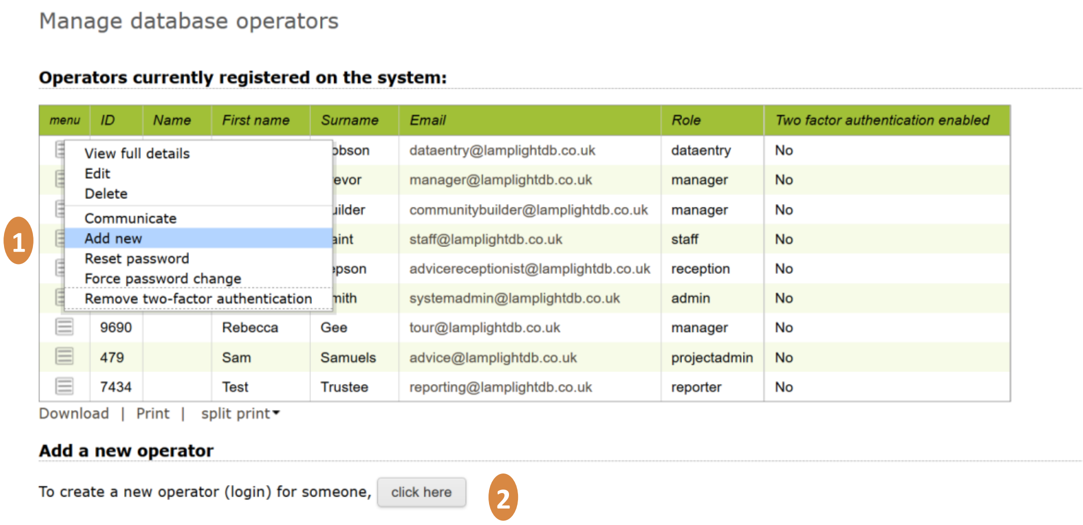
The different levels that you can choose from, and the access this will give to the system are:

Access level	Add records	View records	Edit own records	Edit any record	Delete records	Create/ edit groups	Communi cations	Reports	Upload images	Change admin settings
Receptionist	√		√							
Data entry	√	√	√							
Staff	√	√	√	√		√	√	√		
Manager	√	√	√	√	√	√	√	√	√	
Administrator	√	√	√	√	√	√	√	√	√	√
Reporting								√		

To add a new operator

Please note: When you add a new database operator to the system, it will automatically create a new staff profile for them. If already have a profile on the system it will be necessary to merge the two (see p. 13). When you do this, make sure that the profile you keep is the new database operator one.

1. Click **admin** on the menu bar, then **system administration**.
2. Click **Add, edit and remove database operators** under the **Manage database operators** heading.
3. Right click in the table or use the menu button and select **Add new** from the pop-up menu 1 or use the **click here** button below. 2

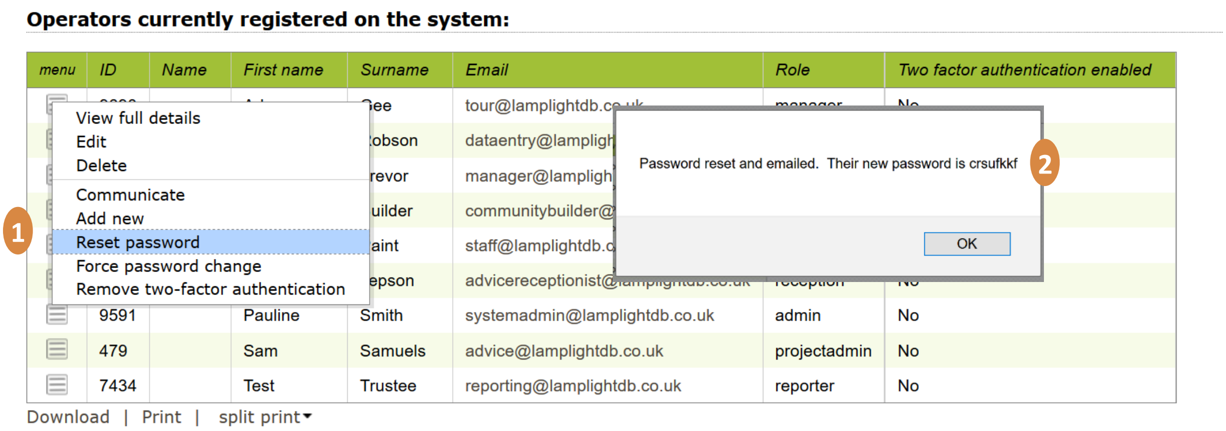


4. Complete the form. Please note that the email address will be their log-in and each operator should have a separate login.
5. Click to **save**.
6. When you add a new database operator to the system, it will automatically create a new staff profile and send an automatically generated email to their registered email account with their initial password.

Resetting a password

As well as being able to request a new password to be emailed, it is also possible for system administrators to see new passwords when they are reset and give them to the database operator themselves.

1. On the database operator table, use the menu button or right click on the name of the database operator.
2. Select **reset password**. 1



3. A pop-up window will appear confirming that the password has been reset and emailed. It will also show what the newly sent password is. 2
4. Do not retain a record of these passwords.

Deleting a database operator

When a person with access to your Lamplight system leaves, it is important to make sure that you delete them as a database operator. When you do this it **does not** delete their profile or any of the records that they are involved in or have entered. It does mean that they can no longer log in to the system.

1. On the database operator table, use the menu button or right click on the name of the database operator.
2. Select **delete**.

Editing workareas and other lists

Most drop-down boxes in Lamplight can be altered. Custom tabs and fields that appear in profiles and activity records can also be added, edited and deleted.

To alter a drop-down list

- Click **admin** on the main menu, then choose **system administration**.
- Under the **Manage drop-down list** section, click on the list you would like to alter.

To add an item

1. At the bottom of each list, there is a box with the option **double click to add**.
2. In the text box which opens, type in the item you wish to add. 1
3. Click **enter** on your keyboard to save.
4. Continue this process until all options have been added.

To edit an item

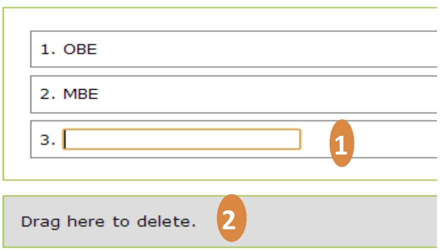
1. Double click over the text you want to edit.
2. Make the necessary alteration and click **enter** on your keyboard to save.

To change the order of the list items

1. Left click with your mouse on the item you wish to move.
2. Hold the mouse button down while you drag the box to the new position. When it is in the place you want, release the mouse button.

To delete a list item

1. Click, hold and drag the box to the bottom of the page.
2. Drag the box over the grey **delete** area and then release the mouse button. 2

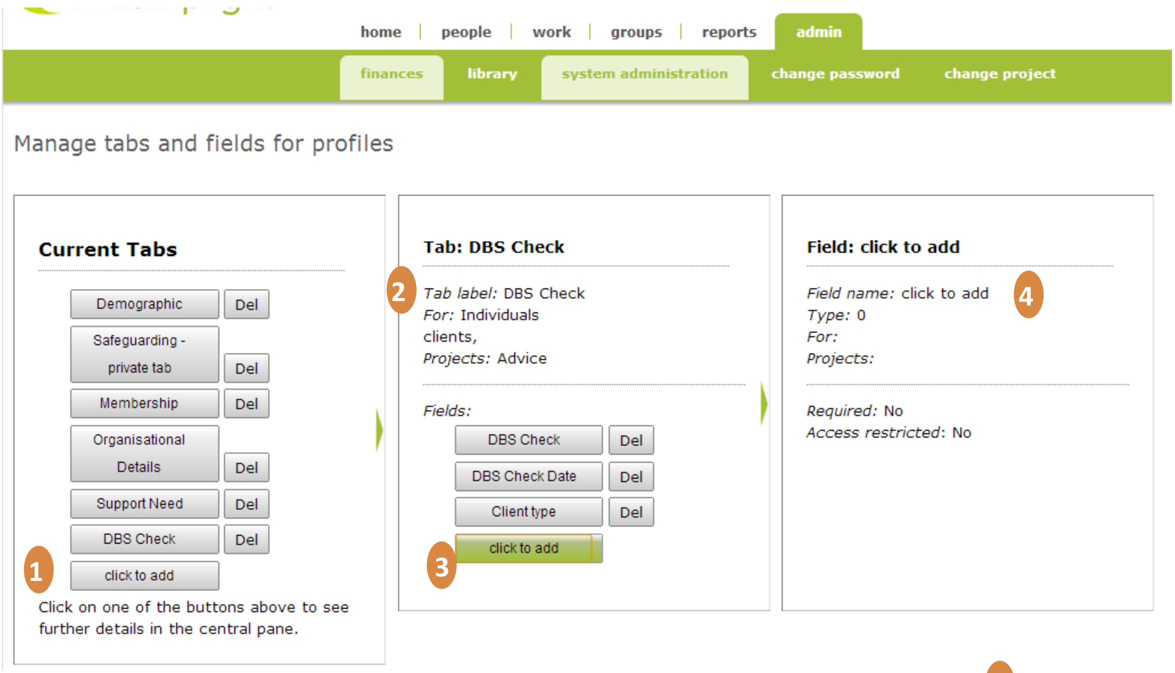


Adding and editing custom tabs and fields

Profile information for people and organisations is captured via custom tabs and fields. You can have as many of these as you need, capturing different information. Different types of profile will have their own custom tabs.

To add a new custom tabs and fields

1. Go to **admin** on the menu bar and click **system administration**.
2. Under the **tabs and fields** section, click on **view, add and edit tabs and fields on profiles**.
3. In the first box on the left hand side, click on the button marked **click to add**.

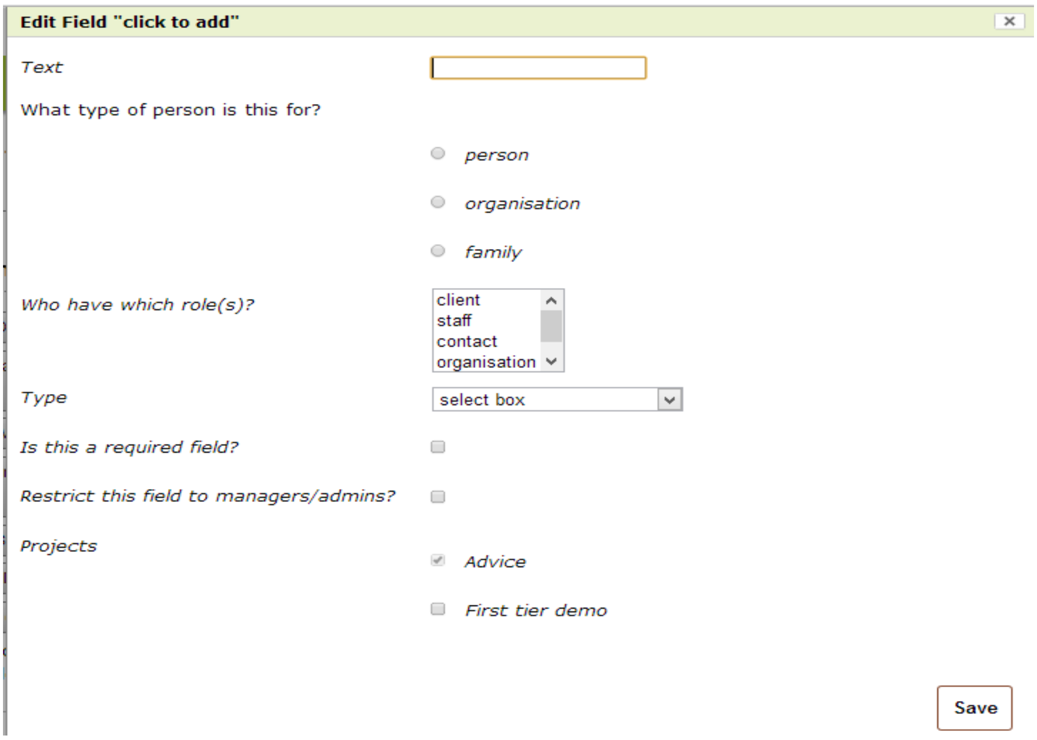


4. In the middle box, double click over the text **Tab label:click to add**.
5. Complete the pop-up box, providing the tab with a title and choosing what type of profiles it will appear in (e.g. staff, client, volunteer etc), and then save it. You will now see the details you've added in the middle box.

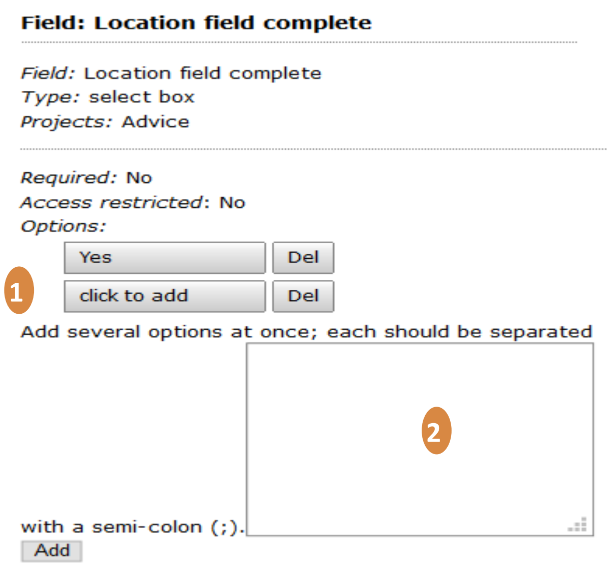
   It is important that fields are added immediately after creating a new custom tab, otherwise the tab will not be saved correctly.

6. To add fields to the tab, click the **click to add** button in the middle box. The box on the right hand side of the screen will then open.
7. In this third box, double click over the text **Field name: click to add**.

8. Complete the pop-up box, providing the title of the field (this is the text you will see in the profile when you have saved the tab), which type of profiles it will be applicable to and the type of field required. Click to **save**.



9. If a select box or multi-select box has been chosen you can now add options within the field. This can either be done by adding one option at a time using the 'click to add' button 1, or by adding several at a time in the text box. 2 If using the text box, each item should be separated by a semi-colon without a space.



Types of custom field

When adding custom fields to a tab, you can choose what type of field you would like it to be.

- Select box - Select a single option from the list of options.
- Multi-select box - to select several options, hold the ctrl key down and select the options you need.
- Plain text area - enter a short amount of free text.
- Plain text box - enter longer amounts of free text.
- Rich text - enter free text and add formatting as desired.
- Check box - click on the box to fill in a tick.
- Radio button - click on the button to indicate a yes.
- Dates - Dates are entered in UK format by selecting from the day/month/year select boxes or using the popup calendar.
- Date/Times - Dates and times are entered on a 24 hour clock from select boxes.
- Date of birth selector - Dates are entered in UK format by selecting from the day/month/year select boxes and a current age is displayed.
- Number box - enter numbers only into a small text box.
- Caption – to add a label for instructions or sub headings.
- Fixed text box - descriptive text that cannot be altered - can be used to add descriptive text or reminders about the other information on the tab.
- Year selector - choose just the year from a drop-down.
- Radio buttons - select one from a range of options.
- Checkboxes - select multiple options using tick boxes.
- Charity number lookup - enter a Charity Commission registered number and Lamplight will add a link to their page on the Charity Commission website.
- Twitter name: a text box that will let you look up their recent tweets.
- Web address - for additional websites - and will provide a link to the site.

If you specify that a field is 'required', this will mean that it will not be possible to save any information on that tab if the field is not completed.

Editing fields

You can return to this **view, add and edit tabs and fields on profiles** screen at any time to edit or add tabs and fields.

If you edit a field, be aware that even though you can change the title of a field, this will not change the data that is already stored there. For example, if you renamed the options in a 'gender' field, editing 'male' to 'female', all your service users whose gender had previously been recorded as ‘male’ would now be shown as ‘female’.

It is best to only edit fields or options to correct typing mistakes or make clarifications. You should not edit fields or options to change the meaning of an existing option.

Linked fields

Linked fields allow you to enter multiple responses under a particular field, for example to record previous addresses as service users move. They also allow you to group a set of records together.

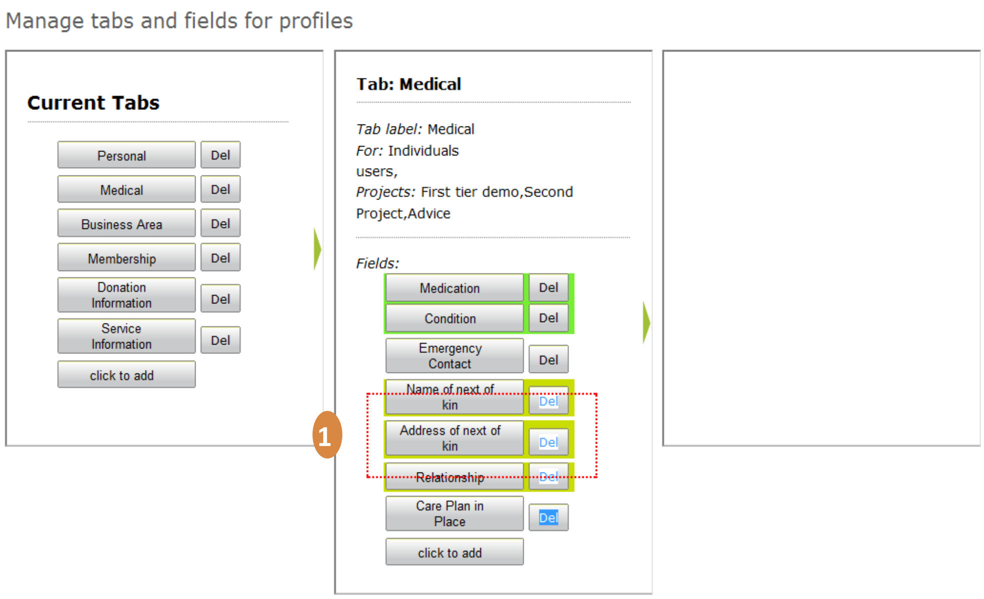
Note: Linked fields are useful for saving information that you will view through the profile. You will not be able to use them for reporting, groups or data views.

On the profile, this would be displayed as a table:

Medical history - condition	*Medication*	*Date diagnosed*	*edit*	*del*
Asthma	Inhaler.	22/06/2002	Edit	de

To create these links between fields:

1. Create the fields you wish to link on the same tab, and make sure that they are next to one another in the correct order.
2. Select the fields that you want to link. To do this, click and hold the left mouse button to the left of the first field in the group you wish to create. A small red rectangle will appear. Still holding the left mouse button down, drag the mouse to cover all the fields you are linking with the red rectangle. 1



3. Release the left mouse button. When you do this the links will be saved, and the background colours change to show this.
4. If you create several groups of linked fields on the same tab, the links are indicated by the different background colours of the fields.
5. If you wish to remove a link from fields in a tab, click the left mouse button and drag the red rectangle back over the group of linked fields. This will remove the link.

Merging profiles

If you have migrated data from an old system then you can sometimes bring across duplicate profiles. These can be de-duplicated by a system administrator.

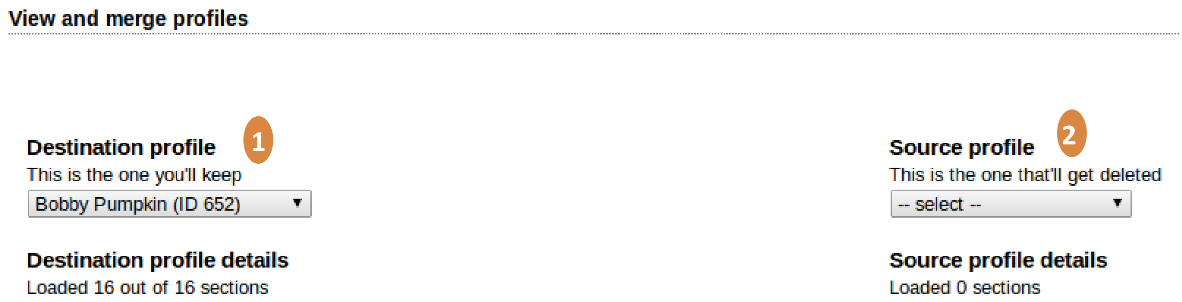
Every person and organisation should only have one profile in Lamplight so if you find you have duplicates then these can be merged together by an administrator.

In **System administration**, go to the **Data management** section and click on the **Find and merge duplicate profiles** link.

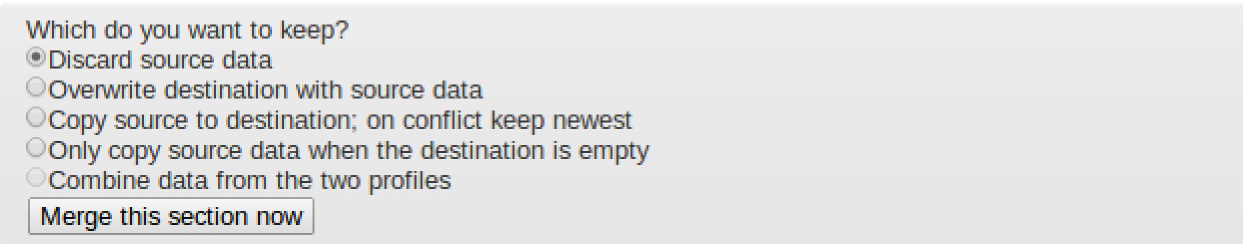
You can choose what criteria you use to find duplicates, whether it's all or part of a profile name or address.

Once the system has searched for profiles, all possible duplicates using the criteria you selected are listed in the destination profile drop down. 1

When you select a profile to merge the source profile drop down 2 will change to match.



For each tab that appears in the two profiles you will be asked how you want to merge them. When you have made your selection click on the **Merge this section now** button.



The source profile is always the one listed on the right. The destination profile will always be the one on the left. The data that you see on the left hand side of the screen once when you are merging sections is the data that will ultimately be kept in the profile for that person.

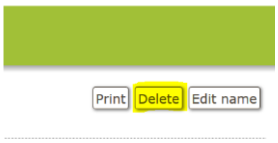
When you have merged each section you can return to the top of the **View and merge profiles** section and delete the source profile.

Archiving and deleting profiles

Administrators can both temporarily and permanently delete profiles. Temporary deletion is straight-forward and reversible. However, permanent deletion cannot be undone.

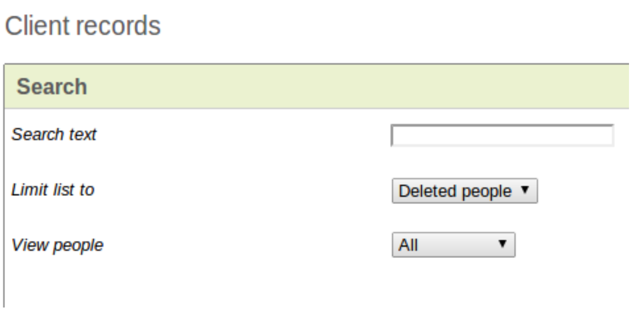
Standard deleting of profiles in Lamplight is a way of archiving them. Any person/ organisation that has been involved in work will still be counted in reports but these profiles cannot be included in groups.

To delete a profile you will need to have manager level access to the system or above. Search for the profile that you want to delete and at the top right of the page, under the menu bar, click the **delete** button.



To find profiles which have been deleted: go to the **People** tab above the menu bar 1, choose the type of person that whose profile you are looking for 2 , and view **all**. 3

Click on the **search bar** above the table to expand it, and select **Limit list to Deleted people**.



Once you have found the person you need to reinstate, the context menu to the left of their name will allow you to **undelete**.

System administrators can also permanently delete profiles from within the admin section under **Data Management**. **This should be used with extreme caution as these cannot be reinstated in any circumstances, even by Lamplight staff.** You can either search for single profiles to delete, or tell Lamplight to search for profiles whose contact details, custom tabs and fields and activity records have not been updated for a particular amount of time.

You have control over what is permanently deleted:

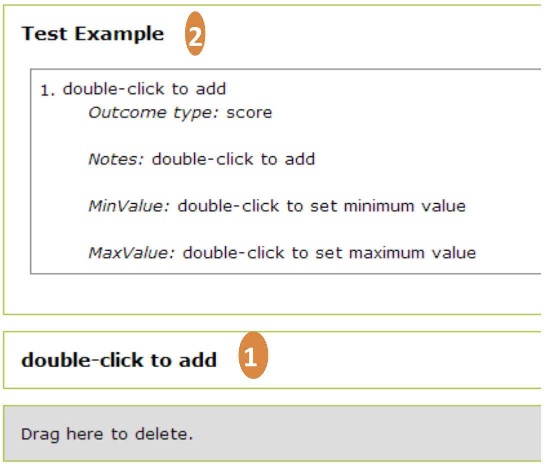
- Name and address only.
- Name, address, and relationships.
- Name, address, relationships and custom fields.
- Name, address,relationships, custom fields, and remove from records.
- Name, address, relationships, custom fields and remove from records. Records where they are the only client listed will also be deleted.
- Name, address, relationships, custom fields and delete any records completely that they are listed on.

Managing outcomes

The outcomes in your system are organised so that you have a main outcome category and outcome indicators within each category.

To add a new outcome

1. Go to **admin** on the main menu and click **system administration**.
2. Under the **manage drop-down lists** section, click on **outcomes**.
3. Scroll to the bottom of the page and double click over the **double-click to add**. 1
4. A text box will open, type in the title of your outcome category and press **enter** to save.
5. In the outcome indicator box, double-click over the text **double-click to add**. 2



6. In the text box which has opened, type in the name of the outcome indicator and **press enter** on your keyboard to save.
7. Double click over the word **score** and use the drop-down options to select the outcome type that you want. Press **enter** to save.
8. Double click to open the **notes** section to add any explanatory notes, click **enter** to save.
9. Set a minimum and maximum **value**. If you are creating a yes/no outcome use the minimum value of 0 and the maximum value of 1. Again, press **enter** to save.

Continue these steps until all measures are added within the category. The system will be updated immediately. **Always remember to press enter after each field that you enter**. If you do not do this, the system may hang. If this happens, click on **system admin** in the **green toolbar**, and then start again in **Outcomes**.

To edit an outcome

Follow the method to edit and delete as shown in the **Lists** section on p.8.

Creating report templates

Report templates allow you to pre-define report parameters so reports that you use regularly can be run instantly. Templates can save you time and allow you to be confident that your reports are set up consistently.

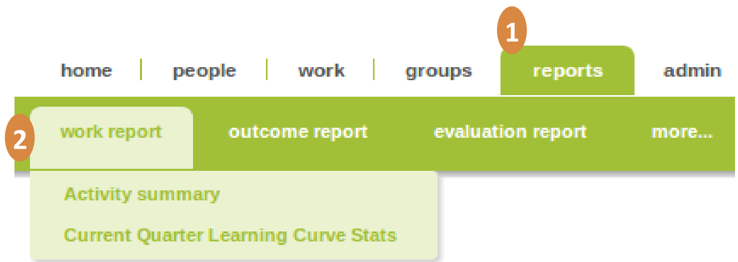
You can create templates for any report type in Lamplight.

To create a template go to **System administration** and in the **Report template** select **Add, edit and remove report templates**. On this page, find the section showing the type of report you want to create, and at the bottom of the list click **add**.

You must give your template a name and description. The name is what you will see in your list of reports, so it's important that it is clear and concise. It is useful to include in the description the criteria you are using. If you want to, you can **lock** your template so that other administrators can't change it.

Once you have entered a name and description, choose the **report filters** and **report presentation** as if you were running a normal report. Click **save** when you are finished.

To use a report, click on **reports** 1 on the main menu, click on the **report type** and the list of templates will appear underneath. 2



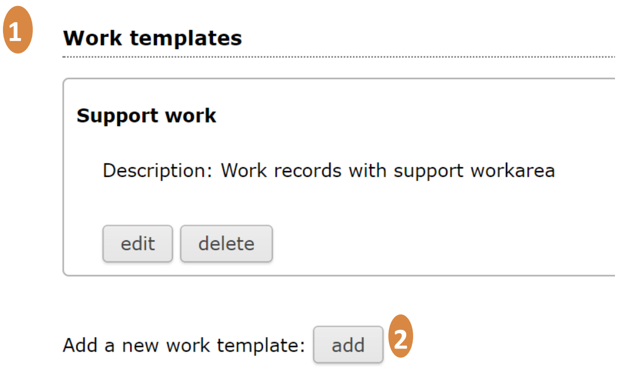
Creating activity list templates

These are similar to report templates, letting you save the criteria that you want to use to search work records so that you can instantly choose a view that you use regularly from a list. You can have as many templates as you like, and they appear as sub-menu items.

You can create templates to view different types of activity record in Lamplight – for example work, outcomes, or referrals – these may have different names in your system.

To create a template, go to **System administration** and in the **Activity list template** section select **Add, edit and remove activity list templates**.

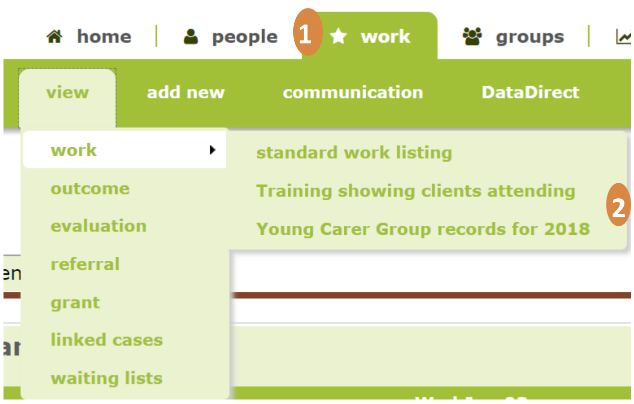
You need to find the section showing the type of activity you want to create a template for 1 . To add a new one, click **add** at the bottom of the relevant section 2 .



As with a report template, you must give your activity list template a name and description. The name is what you will see in your list, so it should be short and self-explanatory. If needed, you can choose to **lock** your template so that other administrators can't change it.

The next pages are where you choose the **filters** and any **extra columns to display.** Once you have all you need, click **save.**

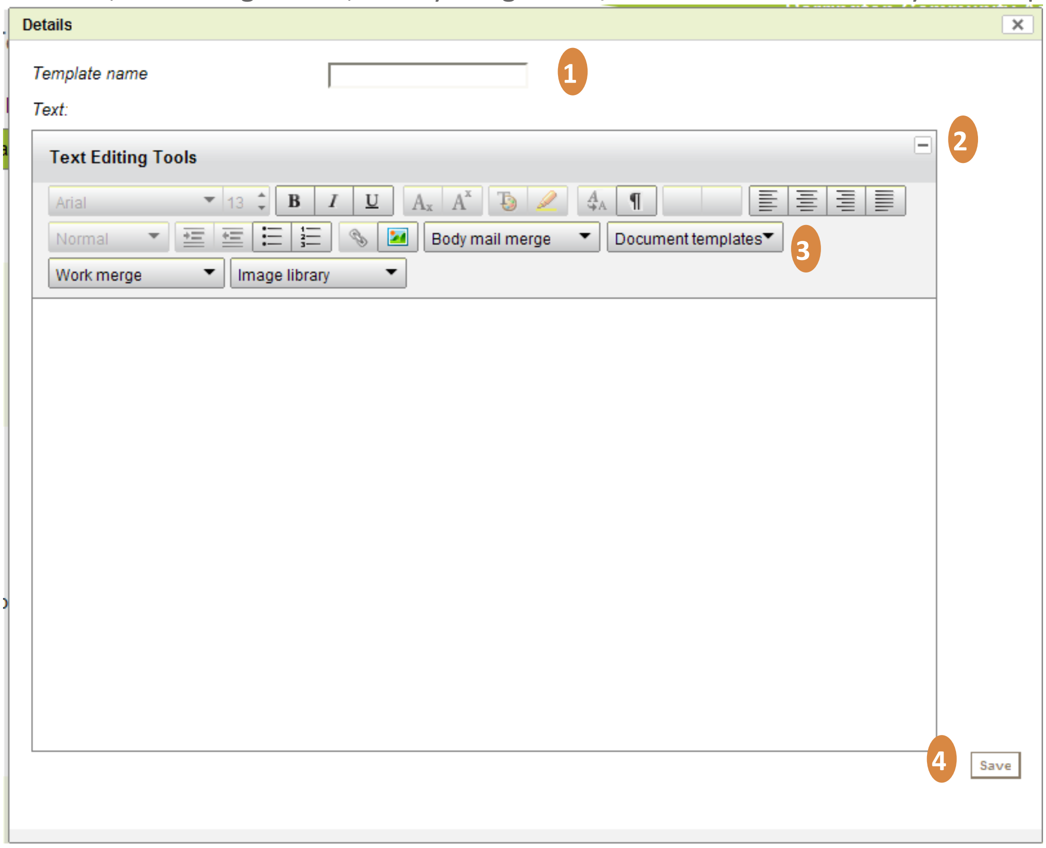
This new template will now appear in a sub-list 2 on the main menu 1 .



Once you have created communications templates they are available to all database operators, allowing you to have more consistent communications across your organisation.

To create a communication template

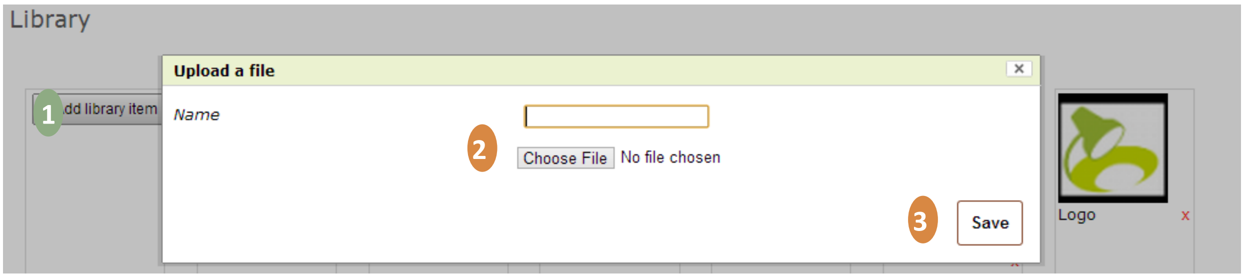
1. Go to **System administration**.
2. Under the **Manage communication settings** section, click on **Add**, **edit and remove communication templates**.
3. Right click on the table or use the menu button to open the pop-up context menu, click **Add new**.
4. In the new form, type in a name for the new template. 1
5. Click the collapse toolbar **cross** to reveal the text editing tools. 2
6. Use text, mail merge fields, library images and/or html code to create your template. 3



7. Click **save** when complete. 4
8. Once you have added images and templates, they will be available in the text editor toolbar when creating new communications. 3

Adding an image to use in communications

1. In **system administration**, under the heading **Manage communication settings**, click on **Go to the library**.
2. Click on the **Add library item** button. 1



3. Type in a name for your image and locate your image by clicking on the **Choose File** button as you would to add an email attachment. 2
4. Click **Save** 3 . Continue the process to add more images to the library.

Editing global settings

Global settings allow you to decide exactly what information you want to capture and how you want to capture it. These changes will be made for all users. Remember to save when you have made any changes to the global settings.

To find them go to **Admin**, **System Administration**, **Customise Lamplight**, **Change global settings**.

The tabs you will find here are:

People and organisations
Decide what information you want to store about people and organisations. You can edit the profile types you're using, change search options and set required fields.

Data to store
Specify what type of records you want to create and what information you want to include. Set the default length of work records and whether to show tasks here.

Cases
Affects how and whether you see cases in your system.

Data display options
What you see by default in tables of records is set up here.

Staff module (only available to those with the Staff Management module)
Use the global settings to tailor how you want your staff time sheets to be compiled.

Communications
Specify the reply to addresses for emails and SMS. You can also link your Lamplight to Mailchimp or campaign monitor in this part of the settings.

Charge module (only available to those with the Charging module)
This is where you can tell Lamplight what accounting package you are using, and the default payment period.

Changing personal settings

Personal settings are changes that you can make in Lamplight, which only impact on how you use it. It is a way of customising how you use Lamplight to fit with your specific work flow. Remember to save when you have made any changes to the personal settings.

Some of the customisations you can make include:

Logging in and general settings

- Homepage tabs – tick items to include them on your homepage. Click and drag to reorder them on the page.
- Menu buttons – set whether or not your tables show menu buttons, and whether those buttons contain case information.
- Timeout warning box – make sure you're never logged out of Lamplight without knowing it.

Profiles

- Group data views – you can set personal views on my users' profiles, all profiles, profile headers and relationship tab tables.
- Outcomes – set your preferred view for outcome information.

Default values for dates on lists of work and other records

- Date from and to – this is the default that will apply every time you view records in a table.
- Attendance on work records – if you always add your own work records then make sure you're automatically added to remove a step.

Communications

- Set your personal email signature.

Uploading profile data

Profile data can be uploaded in bulk to Lamplight. If you want to do this, go to the Upload profile data into your system link which is under File transfer in system administration.

First of all you will need to make sure that your data is ready to upload. To do this you will need to:

- Save the data for uploading in an Excel csv file.
- Make sure that top row has headers (e.g. name, postcode etc), and that they exactly match the name of the profile fields in Lamplight that you want the data to go into. If your data on hair colour is going to a field called 'Client hair colour' then the column in your spreadsheet must also be called 'Client hair colour'.
- If you have multiple options in your source data (such as list of benefits clients receive) then the field type in Lamplight must allow multi-select. In your source data each option should be separated by a semi-colon (;).
- It doesn't matter what order the columns are in on your spreadsheet, Lamplight will search to find the correct fields to match the data to.

The steps for uploading data are:

1. Choose what type of profiles you are uploading. All profiles added in one session need to be the same type, e.g. people/ clients, or people/staff.
2. **Browse** for and add the file you want to upload.
3. The next screen will show you where data from your source file has been matched to fields in Lamplight. You should check that the matching has worked correctly. If there were any problems matching fields it will list them below the table, and you may need to go back to your spreadsheet to match up the fields.
4. Next you need to decide whether you want Lamplight to check and clean your data as it is uploaded. If you do you will probably get a list of errors after the data is inserted (e.g. invalid email addresses). You are likely to have to do some work on the data in your spreadsheet before you get a successful upload.
5. There are three other options to tick – check for **duplicate entries**, find **titles** or **suffixes** in your data and **overwrite existing records** using the IDs in the spreadsheet. These relate to previous data uploads, so **please do not choose any of them if this is your first upload**.
6. If you're happy to go ahead then click **confirm**.
7. If any data hasn't been uploaded then you will be told on the last screen. You will also have your last opportunity to undo the process here.