



Recording Consent in Lamplight

Adding tabs and fields

It is possible to add custom tabs and fields to your Lamplight system to record when your clients give you consent.

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**. 1

home | people | work | groups | reports | admin

finances | library | system administration | change password | change project

Manage tabs and fields for profiles

Current Tabs

| | |
|----------------------------|-----|
| Demographic | Del |
| Safeguarding - private tab | Del |
| Membership | Del |
| Organisational Details | Del |
| Support Need | Del |
| DBS Check | Del |
| click to add | |

Click on one of the buttons above to see further details in the central pane.

Tab: DBS Check

Tab label: DBS Check

For: Individuals clients, Projects: Advice

Fields:

| | |
|----------------|-----|
| DBS Check | Del |
| DBS Check Date | Del |
| Client type | Del |
| click to add | |

Field: click to add

Field name: click to add

Type: 0

For:

Projects:

Required: No

Access restricted: No

4. In the middle box, double click over the text **Tab label:click to add**. 2
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. 3 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**. 4

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 it will be.

9. If it is a mandatory field that must be completed for each client, you can tick the 'Is this a required field?' checkbox. When a database operator is adding data to this tab, it will not be possible to save any information without completing the required field.
10. Click to **save**.
11. 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.

Field: Location field complete

Field: Location field complete
Type: select box
Projects: Advice

Required: No
Access restricted: No
Options:

| | |
|--|------------------------------------|
| <input type="button" value="Yes"/> | <input type="button" value="Del"/> |
| 1 <input type="button" value="click to add"/> | <input type="button" value="Del"/> |

Add several options at once; each should be separated

with a semi-colon (;).

2

Types of custom field

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

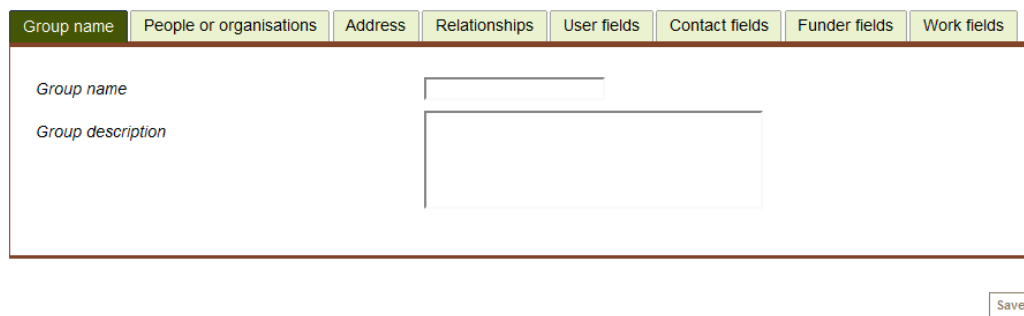
- Select box - Select a single option from the list of options.
- Multi-select box - to select several options, hold the ctrl key down and select the options you need.
- Plain text area - enter a short amount of free text.
- Plain text box - enter longer amounts of free text.
- Rich text - enter free 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.

Using lists and data views to manage consent

Groups are collections of people. Each person can belong to any number of groups.

If you have custom fields to show that clients have given consent for you to handle data or to send them newsletter communications, for example, it is possible to run groups to show who has and has not given this consent.

On the main menu go to **Groups -> Add auto group** and you will see the following screen:

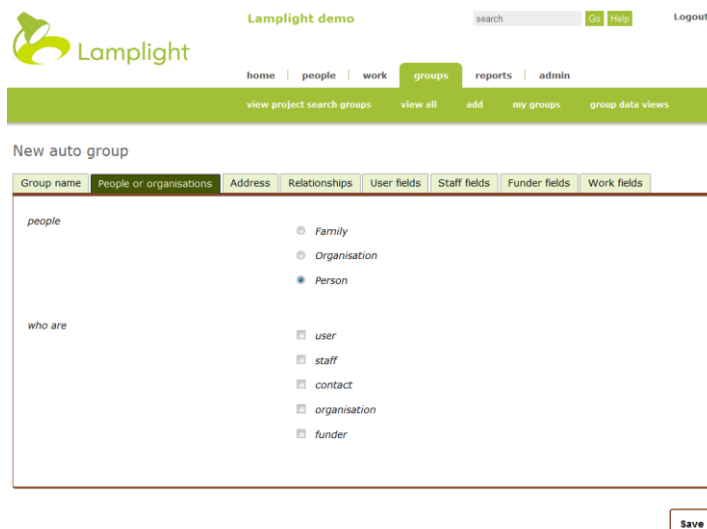


The screenshot shows a web form for creating a new auto group. At the top, there are several tabs: 'Group name', 'People or organisations', 'Address', 'Relationships', 'User fields', 'Contact fields', 'Funder fields', and 'Work fields'. The 'Group name' tab is active. Below the tabs, there are two text input fields. The first is labeled 'Group name' and the second is labeled 'Group description'. A 'Save' button is positioned at the bottom right of the form.

The name and description of the group are to help you and other users of the system remember what this group is for, so it is important that you give your group an informative name and a description of what it is to be used for. Both are required fields.

The first tab is the only one you have to complete. The following ones can be chosen based on the parameters you're using to create the group. Lamplight will only include people that meet ALL the criteria you enter.

People tab: do you want a group of individuals, or organisations? What types of people do you want?



The screenshot shows the 'New auto group' form with the 'People or organisations' tab selected. The form is divided into two main sections. The first section, labeled 'people', has three radio button options: 'Family', 'Organisation', and 'Person'. The 'Person' option is selected. The second section, labeled 'who are', has five checkbox options: 'user', 'staff', 'contact', 'organisation', and 'funder'. A 'Save' button is located at the bottom right of the form.

You cannot create a group of both people and organisations.

The search for the type of person (user, staff) etc. is an 'OR' search: it will include those that meet any of the criteria selected, not just those that meet all of them.

If you are creating an auto group based on permissions given, there will be two places that you are most likely to need to go now.

Address. You can search particular lines of the address, or more reliably search any part of it, or by postcode. When searching by postcode, you can enter multiple postcodes (or partial postcodes) separated by a semi-colon (;). Whenever you search for text, you can select how the search should be carried out:

- Exact match - the phrases should be identical, but they are not case-sensitive (so 'hello' matches 'HeLlO')
- Match anywhere - will match the entire string wherever it occurs (so 'stone lane' matches '15 Stone Lane', and matches '15 Brightstone Lane', but does not match '15 Stonecroft Lane')
- Starts like - will match any strings that start with the search string

Spaces at the beginning and end of address lines are excluded from searches.

This is also where you will find the permissions for post, email and sms communications.

User fields, staff fields, funder fields etc: This tab shows information from the custom tabs set up in profiles (users, staff, and funders respectively). The information here will depend on the fields you have in your system. If you have added in tabs and fields to do with consent, this is where you will see those options.

The comparisons vary depending on the type of field. Date and number fields may be matched as either:

- Greater than or equal to - people with a value greater (or later) than or equal to the value you specify will be included
- Less than or equal to
- Equal to.

Note too that numeric and date comparisons in Lamplight are usually inclusive (for example \geq , not $>$).

Where there are multi-select options, only those that match all of your selections will be included in the group, unless you specify otherwise.

Data views

Group data views are a way of selecting the information you want to view about people. For example, you need to see view phone numbers and the date each member of a group last attended. It is a way of adding columns to the table when viewing a group. Data views add information - they do not filter the members of the group in any way.

If you have a number of fields that you want to view, it is best not to create one group data view that has everything in it. One big data view is harder to view because the information won't fit on a screen, and it will take longer for Lamplight to load the data. It's better to create a number of data views for different purposes.

Creating data views

Any data view may be used with any group. To set up a new data view, go to **Groups->Group data views->Add** on the main menu. You will see the screen below:

New group view

| | | | | | | |
|---------------------|--------------------|-----------------|-----------------|---------------------|-------------------|---------|
| 1. View name | 2. Contact details | 3. User fields | 4. Staff fields | 5. Funder fields | 6. Contact fields | 7. Work |
| 8. Outcomes | 9. Communications | 10. Evaluations | 11. Cases | 12. Blank column(s) | | |

View name

View description

View name tab: you will first need to give the view a name and description. The name is how you will identify the data view in a list, so try and choose something that will remind you what it is for in future. Both the name and description are required fields.

After this, simply choose the fields you would like to display in the table. When you use your data view to look at a group, each box ticked here will be displayed as a column heading in your table.

Contact details tab: select which contact fields you'd like to see.

User fields, Staff fields, Funder fields and Contact tabs: will let you add some of the fields from the tabs in people or organisations' profiles. Again, if you have added in custom tabs and fields to do with permissions, this is where you will be able to select to view the data in these.

Work, Outcomes, Communications, Evaluations, Cases tabs: lets you add summary details about work, outcomes, communications, evaluations and cases (if you have those modules enabled).

New group view

| | | | | | | |
|--------------|--------------------|-----------------|-----------------|---------------------|-------------------|----------------|
| 1. View name | 2. Contact details | 3. User fields | 4. Staff fields | 5. Funder fields | 6. Contact fields | 7. Work |
| 8. Outcomes | 9. Communications | 10. Evaluations | 11. Cases | 12. Blank column(s) | | |

Work - summary (does not use dates/work areas below)

- Most recent record
- Earliest record
- Number of attendances in last month
- Number of attendances in last 3 months
- Number of attendances in last year
- Number of attendances
- Total time spent

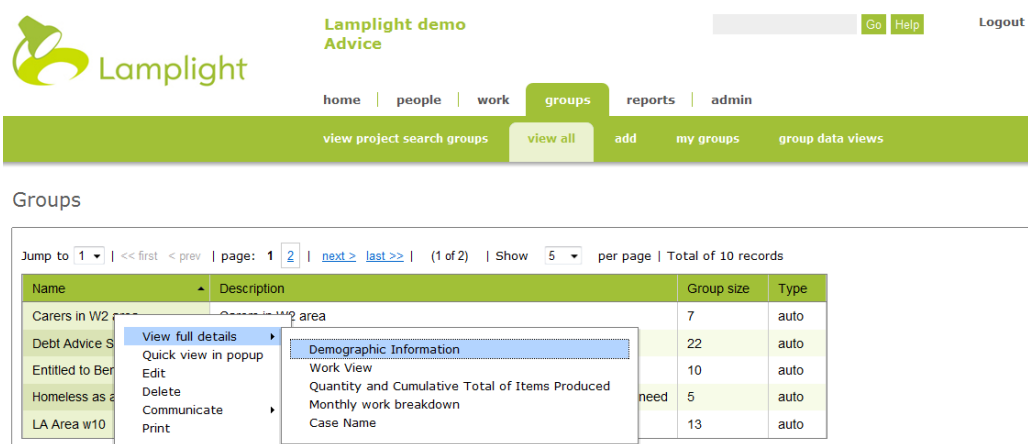
Blank column(s): you can add blank columns to your data views, perhaps useful if you are using group data views for a register and you need a 'signed' column.

When you have added all the information you wish to see, click the **save** button on the bottom-right of any page.

Using data views

Once you have set a data view up, you can use it to view any group.

To use a data view, go back to **Groups -> view all**. Right-click on the group whose data you want to see, hover over **view full details** and choose the data view you wish to use.



The screenshot shows the Lamplight Advice web application. The header includes the Lamplight logo, the text 'Lamplight demo Advice', and navigation links for 'Go', 'Help', and 'Logout'. Below the header is a navigation bar with links for 'home', 'people', 'work', 'groups', 'reports', and 'admin'. A secondary navigation bar contains 'view project search groups', 'view all', 'add', 'my groups', and 'group data views'. The main content area is titled 'Groups' and displays a table with columns for 'Name', 'Description', 'Group size', and 'Type'. A context menu is open over the 'Debt Advice S' row, showing options like 'View full details', 'Quick view in popup', 'Edit', 'Delete', 'Communicate', and 'Print'. A sub-menu is also visible, listing data views such as 'Demographic Information', 'Work View', 'Quantity and Cumulative Total of Items Produced', 'Monthly work breakdown', and 'Case Name'. The table shows four rows with group sizes of 7, 22, 5, and 13, all with a type of 'auto'.

| Name | Description | Group size | Type |
|-----------------|----------------------|------------|------|
| Carers in W2 | Carers in W2 area | 7 | auto |
| Debt Advice S | Debt Advice S area | 22 | auto |
| Entitled to Ben | Entitled to Ben area | 10 | auto |
| Homeless as e | Homeless as e area | 5 | auto |
| LA Area w10 | LA Area w10 area | 13 | auto |

The Multimedia module and permissions

It may be that you want to store scanned copies of signed documents showing that your clients have given you permission to store their data. You will need the multimedia module to do this.

The multimedia module allows you to attach files and link online media to your work records and profiles. You can store all kinds of files and make them searchable through the main Lamplight search if you choose.

Media Formats

You can upload any kind of file using the media module, although individual files must be less than 10MB each. Lamplight will try to create a simple preview image, and optionally to index the content for searching. The types of file that previews can be generated for are:

Word processing (.doc, .docx, .odt, .rtf)

Pdfs (.pdf)

Spreadsheets (.xls, .xlsx, .ods, .csv), and

Powerpoint files (.ppt)

Lamplight will also create thumbnails for images uploaded (in .jpg, .png, or .gif formats).

These scanned and uploaded documents will then be available to preview in the media tab of the client's profile, and to download in future if necessary.