Lamplight

Global Settings

www.lamplightdb.co.uk

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Introduction to Global Settings

Global settings in Lamplight affect every database operator, and control how the system behaves, which options are available to all users, and how information is displayed.

Settings affecting each database operator individually are found in personal settings.

To access global settings, you need System Administrator privileges. Navigate to sysadmin>system administration>Customise Lamplight and select 'change global settings'.

Note: the main menu in Lamplight generally stays in place as you navigate around the system. This makes it clear and easy to find, but when you want to change the way main menu options behave, you may need to refresh your page (press F5 on your keyboard) before you see the changes take effect.

The People and organisations tab contains options concerning how to record information about people and relationships in profiles, how the search function works and displays results, how new profiles are created.

Profiles

Do you want to keep service user names anonymously?

If this option is not enabled, the name is a required field for creating a service user profile. With this option enabled, service user profiles can be created without entering a name. Profiles can be identified by their lamplight ID numbers, which are automatically assigned. They can still be created with names as well, so it is possible to have a mixture of profiles that are and are not anonymous.

Do you want to store middle names?

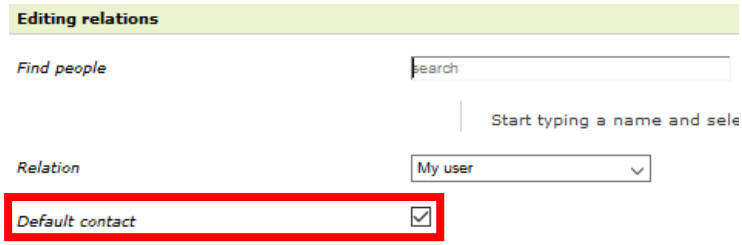
This option enables an extra field on profiles, and when adding a new profile, for the entry of middle names.

Do you want to be able to store details of relationships between different people?

This option enables profiles to be linked by relationship. For more information on relationships in Lamplight, see the Appendix at the end of this guide.

Should the "default contact" box be ticked by default?

This option appears when linking two profiles and determines whether the profile is to be used as the default contact. This is how it appears when adding a relationship:



For example, if you want general communications with an organisation to be addressed to the Receptionist, you need to tick this box when you link the Receptionist's profile to the organisation profile. You might not want this box to be ticked when linking the profile of their Finance Manager to the organisation profile.

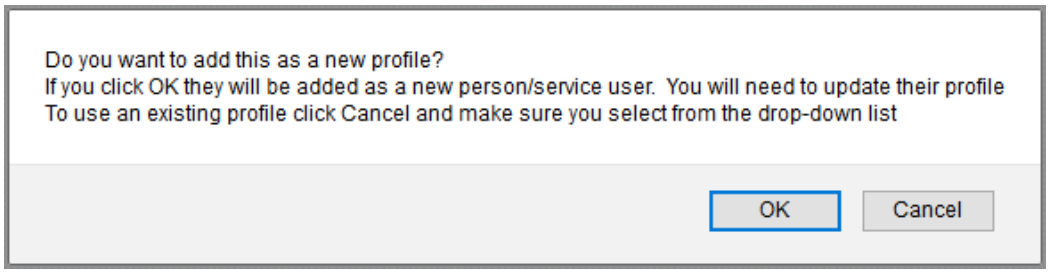
It is advised to only have one profile set as the default contact for each organisation, otherwise the system will not always make the desired selection when addressing communications. To avoid unexpected results, it may be advisable to disable this option, which is enabled by default, in global settings.

Note that this option only takes effect when the setting 'Do you want to use relationships between people in work and other records?' is enabled.

Do you want to be able to add new profiles from the relations tab?

This option enables you to create profiles using the 'Find people' box when adding relationships to profiles. If the desired profile does not exist, it will be created using just the name you entered the box. You will need to navigate to the profile afterwards to update the profile with other details. It will automatically have been created as a person who is a 'service user', or the equivalent in your system.

If this option is enabled and you go to create a profile in this way, you will be presented with a message letting you know that you are about to create such a profile.



Do you want to use relationships between people in work and other records?

If this option is not ticked then you will not be able to use default contacts in your system. If you choose to enable this option then there will be a 'default contact' tickbox when you set up a new relationship.

Do you want to allow multiple default contacts for a single profile?

When you set up a relationship you have the option to create the person you are linking as a 'default contact' for the profile it is linked to (see 'Should the "default contact" box be ticked by default?' above). Ticking this 'multiple default contacts' box will allow you to link many profiles to a single person or organisation, each as the default contact.

It is advised to only have one profile set as the default contact for each profile, otherwise the system will not always make the desired selection when addressing communications. Only tick this box if you have a specific reason for needing multiple default contacts for a single profile.

What types of people do you want to store details of?

Lamplight has two types of profiles enabled by default: 'person' and 'organisation'. If you do not need to use both, this is where you can disable the type you don't need.

In addition, you can enable 'family' profiles. These can be useful if you need to record specific details about a family as well as the individuals in that family. For example, whether members of that family have access to a car, or details of their immigration status or housing situation. If you do decide to use family profiles, you may also need to think about linking family members to the family profile using **relationships**.

What roles may different people or organisations have?

Every profile in Lamplight is given a role. The default options for these roles are:

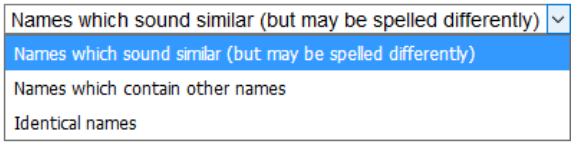
- service user
- staff member
- contact
- organisation
- funder
- volunteer

If you don't need to use any one of these, you can disable it here to avoid complication when adding new profiles.

How to check for duplicates when entering new people?

This option governs how the system searches for similar profiles to prevent the creation of duplicates. The options are shown below.

How to check for duplicates when entering new people?



Further information about the options for **identifying duplicate profiles** is at the end of this document.

Do you want to enable autosave on profile custom tabs?

This option can be useful if you often forget to use the save button to save the information you have entered into custom profile tabs. It will save automatically in this case. Be careful enabling this option though, because any information you delete or overwrite will be lost automatically, without requiring you to click the save button. There is no way to cancel or undo once it has autosaved.

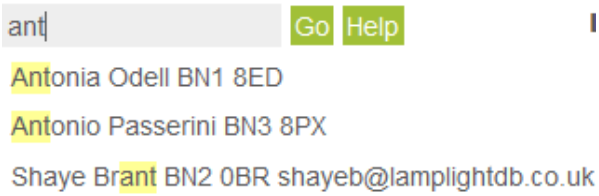
Searching

How do you want searches to display the results?

This option governs how information is displayed in the search bar in the top-right corner of the screen when matches are found.

The default options, first name surname and ID number will cause results to be displayed like this:

Changing the options to full name, postcode, email address, for example, will cause the same results to be displayed like this:



Do you want to show relationships in the main menu search?

Profiles in Lamplight can be linked using relationships. This option allows profiles to be displayed in the search bar according to the relationships that profile has. It is similar to the way in which linked profiles are displayed when searching to add attendees to work, outcome or referral records.

Enabling this option can help you to distinguish between people who have similar names, or to quickly identify the name of someone related to another profile. It will cause the results to appear as in this example:

If you type a number in the search, do you want to search the Lamplight IDs?

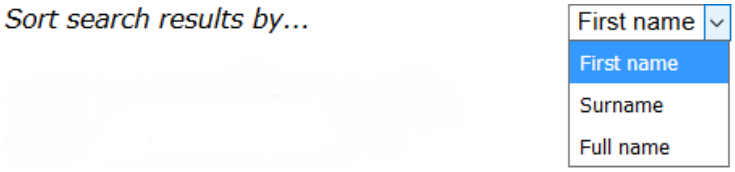
As well as searching by name, you can use the search box to find profiles based on date of birth, email address or ID number. You can also search for case ID numbers or work record ID numbers.

A profile's ID number is automatically generated by Lamplight whenever you add a new profile to the system. If you regularly search using numbers but do not use the ID numbers generated by Lamplight, you may want to disable this option to limit the number of search results.

Sort search results by...

This option does not affect how results are listed in searches from the search box in the top right corner of the screen. Rather, it governs how profiles are listed in the tables you see when you use the main menu items under people>view, for example when viewing all service users.

You can sort search results by first name, surname or full name.



Minimum number of search results before searching again

In the main menu search bar, Lamplight will try different ways of searching until it finds some results. By default, it will only try additional searches if it does not find any results.

You can change this behaviour, so that additional searches will be carried out if there are fewer than three results, for example. By putting a larger number here, you will get more search results, but searching will be slower.

The top-right search bar works in the following way:

- If you enter a number, it will search for profile IDs, work/referral/outcome IDs, or case IDs.
- If you enter an email address, it will search email addresses.
- If you enter a date, it will search date fields in profiles.
- If it looks like a postcode, it will search in the postcode field.
- If you enter a series of letters, it will search full names.
- If the number of results is below the limit set in this configuration option, it will then search the Alternative Name field in profiles.
- If the number of results is still below this limit, it will search for names that sound like the search term provided (using the Metaphone algorithm).

Adding new profiles

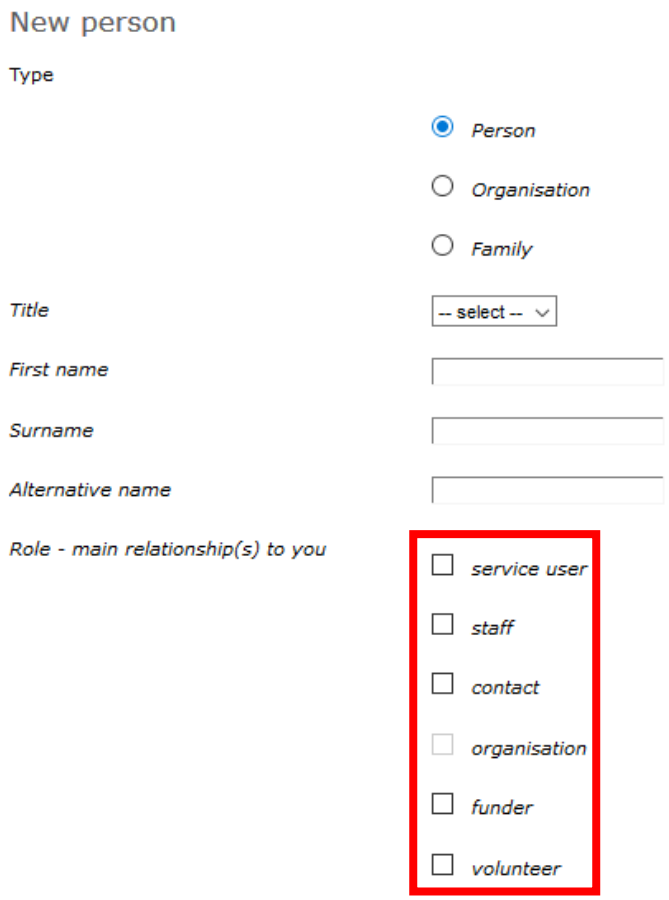
Do you want to split up the "person -> add" main menu item?

This option governs the way that new profiles are created from the main menu.

By default, this option is enabled, which means that when you click people>add person in the main menu, you are offered a list of the roles enabled in your system. Once you click on a role, it will be selected in the 'New person' screen you see next.

If you choose to disable this option, clicking people>add person in the main menu takes you straight to the 'New person' screen, but no profile type will be selected. You will need to enter one here instead of selecting one through the main menu.

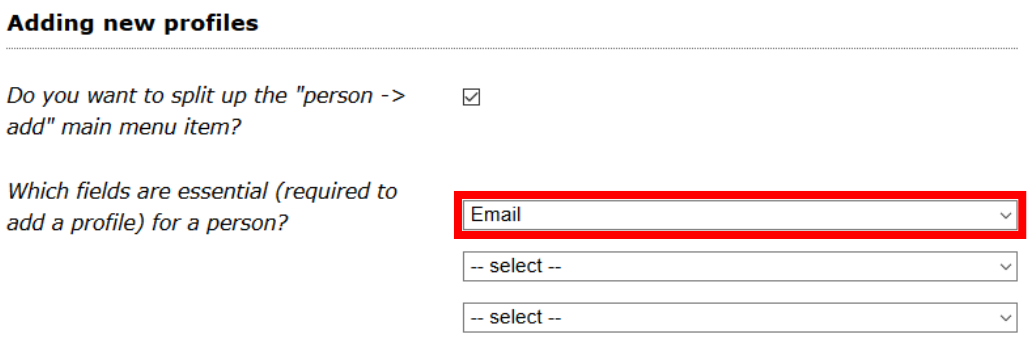
This setting does not change the options available, it just changes how they are viewed in the main menu.



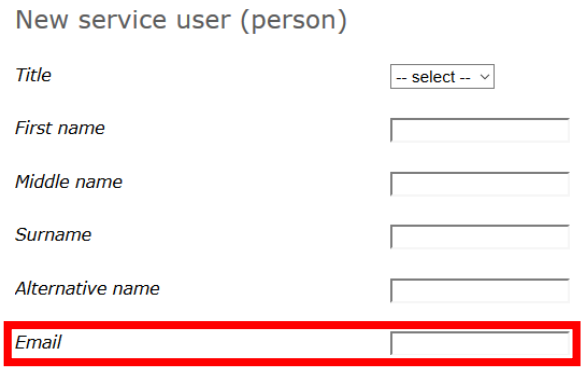
Which fields are essential (required to add a profile) for a person?

Essential fields are those that must be completed to create a profile. Each of these ten drop-down menus lists all the fields available in person profiles. Selecting a field from one of these menus will add it to the initial profile creation page, which must be completed before a new profile can be saved.

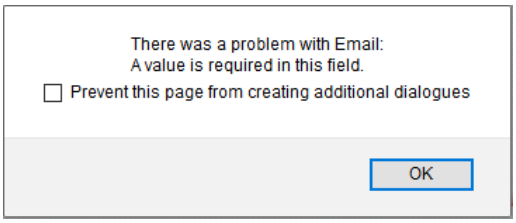
For example, selecting 'Email' from the list as shown here…



… will show the 'Email' field in the initial profile creation page as shown here (it will still also be visible and editable in the tab that it was created in):



If you try to save a profile without completing the essential fields, you will be presented with an error message like the one below and you will need to complete the field on order to proceed with the profile creation.



It might be advisable to limit the number of essential fields to those critical to your work, otherwise creating new profiles will require a lot of information without which the staff member will not be able to save the profile.

Note that if you specify an essential field, profile types will automatically be split in the main menu and this will override the **split up the "person -> add" main menu item** option.

Which fields are essential (required to add a profile) for an organisation?

As with the **essential fields required for a person profile**, you can use the drop-down menus in this setting to specify which fields are required to add an organisation profile.

Do you want to use tasks at all?

Tasks are an optional function in Lamplight. They are not used in reports, but can be a useful way of keeping track of things that need to be accomplished.

Tasks are associated with a date and time, assigned a category and/or flag (these are specified in admin>system administration>Manage drop-down lists>Messages), and can be marked as complete, along with a date and time, when accomplished.

Tasks are also linked to profiles and can be viewed directly in a profile's 'Tasks' tab, which is enabled if this option is selected.

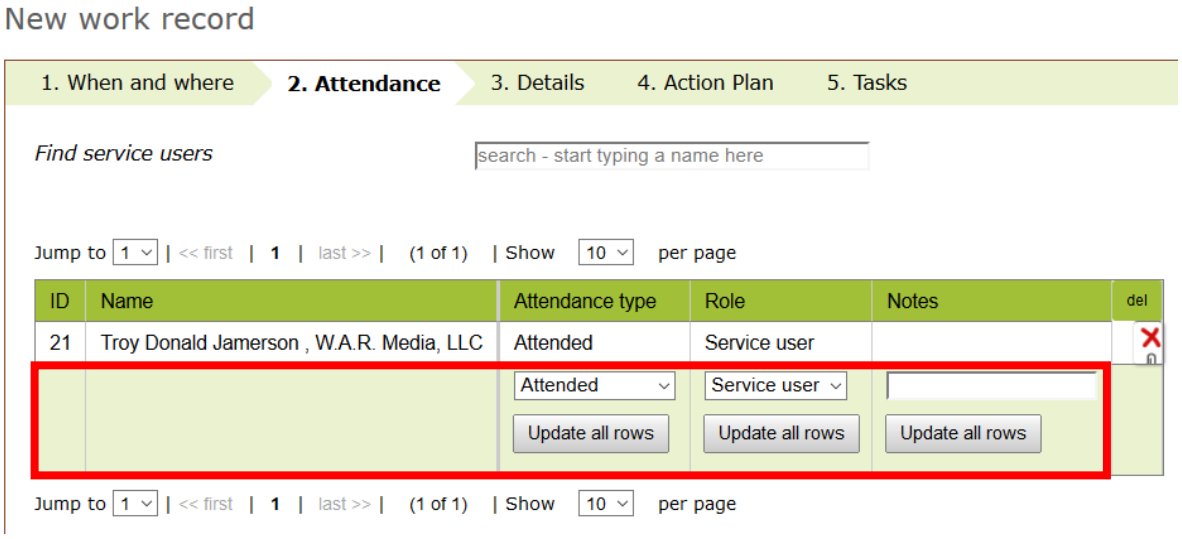
Tasks appear in a table, such as the one below. As this task has been associated with a database operator, it is showing up in the 'Tasks' tab on their homepage.

Tasks can also be added to work records and referral records in the 'Tasks' tab. Tasks created in records can still be viewed in profiles associated with them.

Do you want to allow bulk updating of the attendance table in work and other records?

When adding profiles to the attendance table in a work record, referral record or outcome record, you must usually specify attendance type and role for each profile, as well as adding any notes.

With this option enabled, there is an additional row in the table that allows you to edit these fields for all profiles added to the attendance table at once.



Do you want to allow adding new service user profiles from work, referral etc. records, even if you have profile essential fields enabled (see previous tab)?

If you have **specified essential fields for adding profiles**, it is not usually possible to create new profiles from within a work, referral or outcome record. This is because profiles created in this way will not have the essential fields completed upon creation.

Enabling this option will mean that profiles can be created in this way despite lacking the essential information specified in global settings.

If you want to use this option, it is important to remember that such profiles will need updating following their creation.

Work records

Do you want to store work records?

Work records are enabled by default in Lamplight. They allow users to record work they have done and can be used in many ways, including producing detailed reports. For most Lamplight users, they represent key element of their system.

If you do not use Lamplight to record your work, for example if you only use your system to track contact information, you can disable work records entirely using this option.

What is the default length of one work record (minutes)?

When entering work records in Lamplight, there is a default duration of sixty minutes. What this means is that, when you specify a start time for a work record, the end time is automatically set to sixty minutes later. This reduces the amount of work that you do to enter records if you usually record sixty-minute periods of work.

If you usually see clients for a set amount of time that it not sixty minutes, changing this setting will reduce the amount of data entry you need to do for each work record.

For example, if a typical appointment within your organisation lasts thirty minutes, it would make sense to change this setting to thirty.

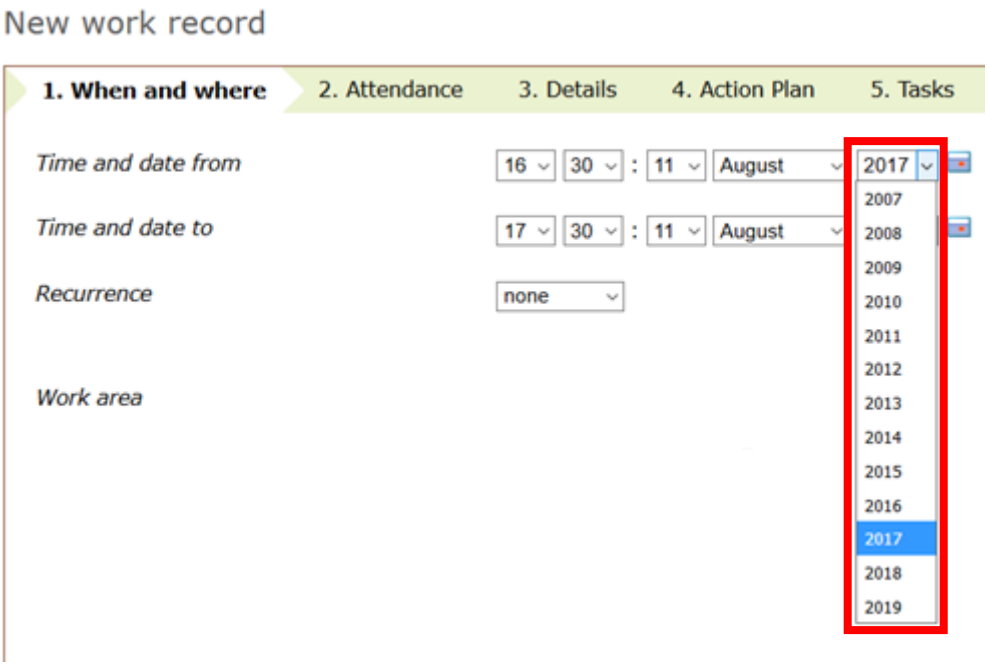
Note that it remains possible to adjust each work record, this setting is simply a quality-of-life improvement that could reduce how many clicks it takes to enter repetitive information.

Do you want to use tasks with work records?

If you have enabled tasks in your system, there will be a 'Tasks' tab on work records which allows you to link tasks to them. You can disable this option to hide this 'Tasks' tab and keep tasks separate from work records.

How many years back should the dates go in work records?

When creating or editing a work record, the year is selected using a drop-down menu. By default, this list goes back ten years, which is enough for most purposes.



If you need to enter historical records onto your system, you can adjust this setting so that this list goes back further than ten years, allowing you to enter records from further back in time.

Do you want to add a "add to diary" tickbox on work records?

By default, when a work record is created it is added to the diaries on the home page. This includes both the 'My Diary' tab and the shared 'Diary' tab.

This option allows you to choose whether to add work records to these diaries by adding a tickbox at the bottom of the 'When and where' tab on work records as shown here.

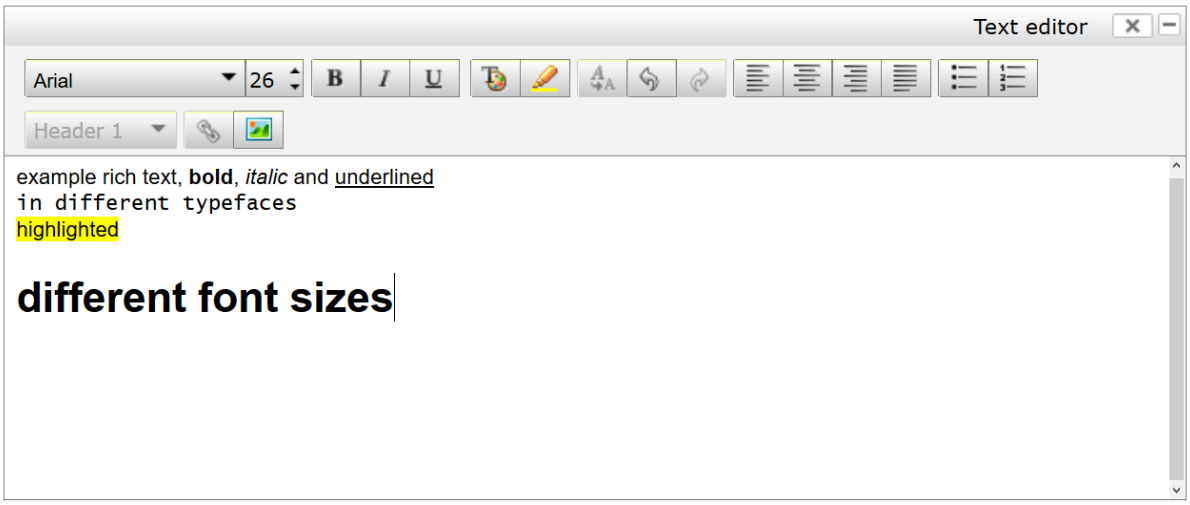
Show this record on home page diaries? ☑

Note that if you enable this, operators will be able to create work records that do not show on the home page diary, but these records remain accessible to all operators as normal (for example in work > view > work) so this feature does not restrict access to information.

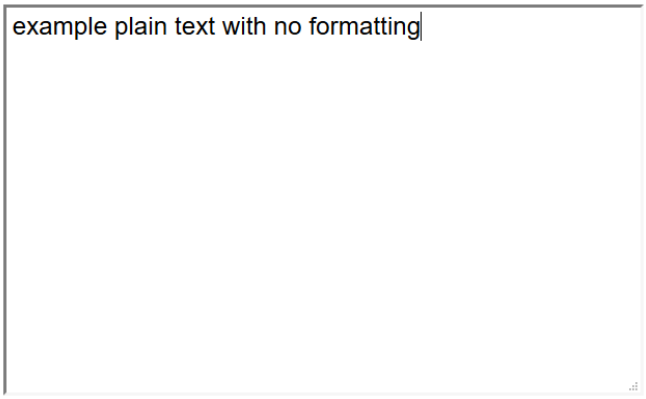
Do you want plain text or rich text boxes for summary, description and follow up?

When entering summary, description and follow-up information in work records, by default the text boxes are 'rich text boxes', which means that they

offer options for formatting, including different typeface, different font sizes, bold, italic and underlined type, etc. as in the example below.



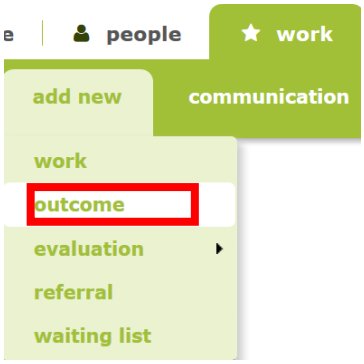
If you don't require these formatting options, this option changes these to plain text boxes instead, as in the example below.



Outcome records

Do you want to store outcome records?

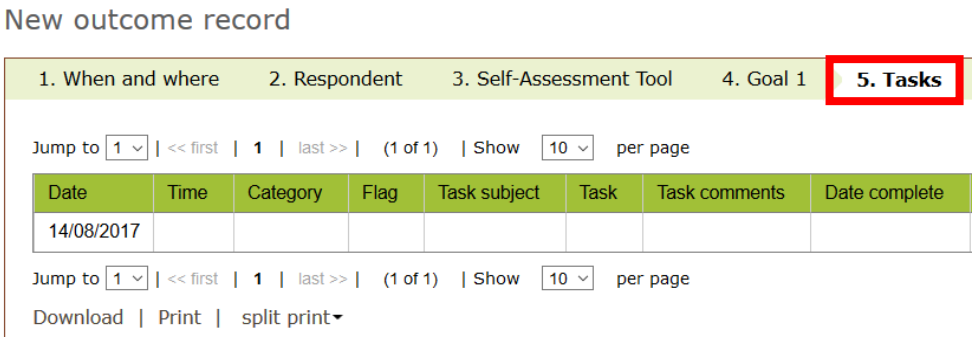
Outcomes in Lamplight are used to track change over time. An outcome record functions as a snapshot from one point in time, and multiple outcome records can be compared to measure the difference. They are primarily used to understand the difference an organisation's work is making, and are very useful for presenting this information numerically for reports or funding proposals. By default, outcome records are enabled.



Outcome records can be viewed or created in the main menu through work>view>outcome and work>add new>outcome, respectively. An individual's outcome records can also be viewed and created through the 'Outcomes' tab in their profile. This functionality can be disabled for simplicity if outcomes are not needed in your system.

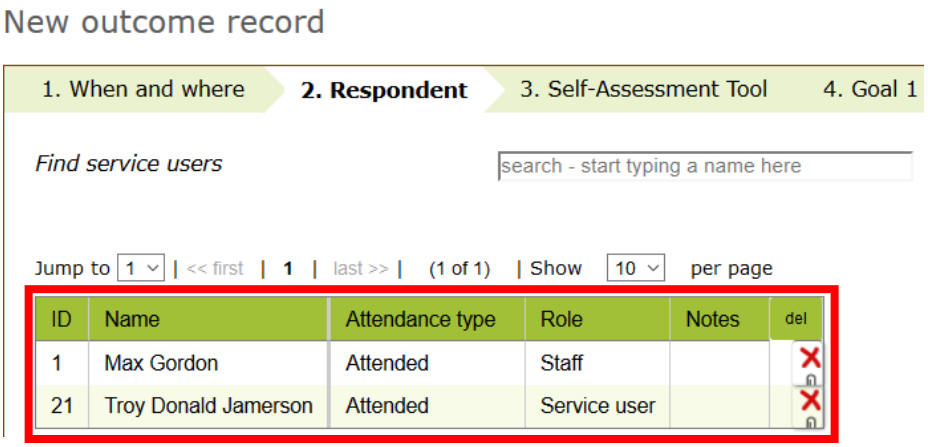
Do you want to use tasks with outcome records?

With this option, tasks can be associated with outcome records in the same way that they can be associated with work records and referral records. A tasks tab becomes available when adding a new outcome record through the main menu, as shown here:



Do you want to use simple or tabular attendance information on outcome records?

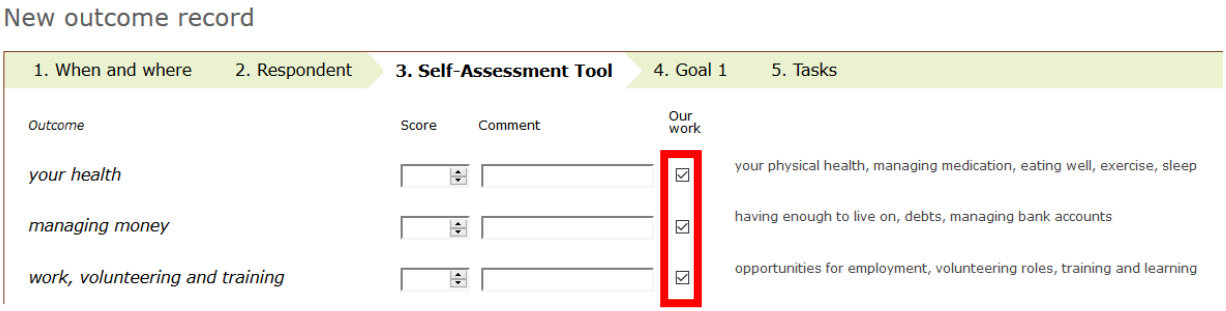
By default, profiles added as attendees on an outcome record are listed in a table. This allows for multiple people to be added in different roles, as in the example below.



If this functionality is not required, and the most that will be listed on an outcome record is one service user profile and one staff profile, the simple search box may be sufficient. It appears as in the example below. An important thing to remember when using this simple view is that you must select the profile from the search options that appear as you type, rather than just typing the name. This will ensure that it is linked to the correct profile.

Tick the "our work" checkboxes by default

These checkboxes are used to indicate whether an outcome change has been as a result of your work. They are ticked by default unless you deselect this option.



Referral records

Do you want to store referral details?

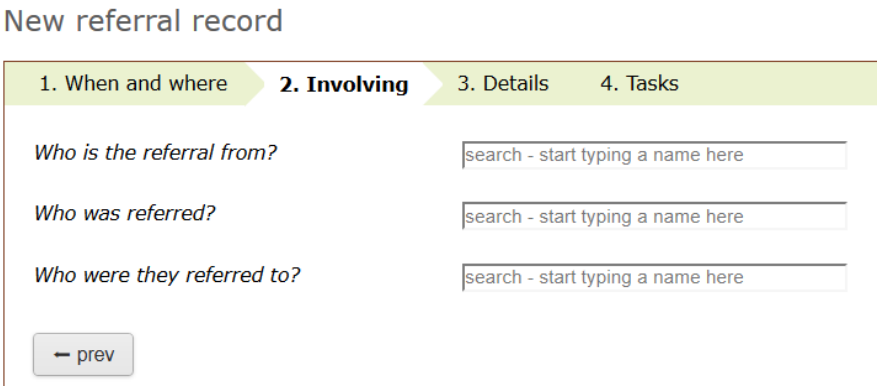
Referral records are one of the core types of information that can be recorded in Lamplight. In their simplest form, they track who has been referred, who has referred them and who they have been referred to, along with referral reason, additional notes and details of the date, time and relevant work area. They can also be configured to record different ways in which one person is directed to another contact or service, for example signposting. If you do not require this type of information to be recorded in Lamplight, you can disable the functionality with this option.

Do you want to use tasks with referral records?

Just as you can associate tasks with **work records** or **outcome records**, you can choose to associate them with referral records. This option is enabled by default but can be turned off if you do not require it.

Do you want to use simple or tabular attendance information on referral records?

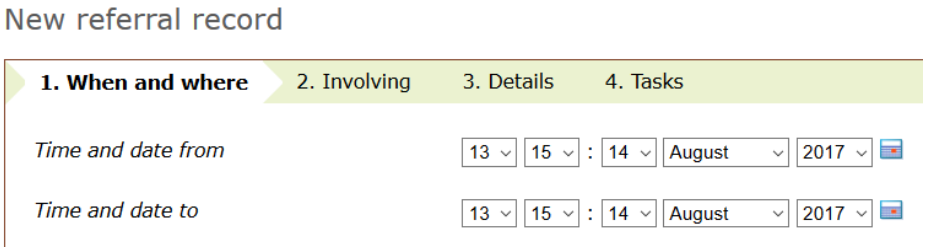
As with **respondents in outcome records**, profiles can be added to referral records using either the default table style or simple search boxes. In the simple search box view on referral records, there are three fields: referrer, service user referred and who they were referred to, as shown below.



Show date to when adding referral records?

For most purposes it may be enough to record the time and date of referral, in which case you will not require this option. To record a duration for referrals,

you can enable this to allow the entry of a second time and date field, as shown below.



Grant records

Do you want to store grant details?

Lamplight can be used to record details of grants. As well as time and date, workarea and attendance information (which are common across all types of record), grant records can contain information about whether a grant is for capital or revenue, with an approval date, grant amount, and text fields for summary, description and monitoring requirements. If you don't use Lamplight for recording grant information, disabling this option will prevent the extra menu options from appearing.

Do you want to use tasks with grant records?

As with **work records**, **outcome records** and **referral records**, you can choose whether to enable tasks with grant records. Disabling this option will prevent the 'Tasks' tab from appearing when entering grant records.

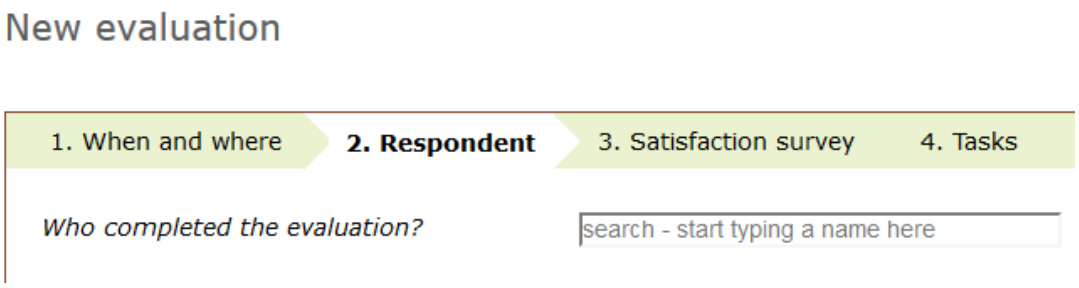
Evaluation records

Do you want to use tasks with evaluation records?

As with **work records**, **outcome records**, **referral records** and **grant records**, you can choose whether to enable tasks with evaluation records. Disabling this option will prevent the 'Tasks' tab from appearing when entering evaluation records.

Do you want to use simple or tabular attendance information on evaluation records?

As with **respondents in work, outcome** and **referral records**, profiles can be added to evaluation records using either the default table style or simple search boxes. In the simple search box view on evaluation records, there is one field for 'Who completed the evaluation', as shown below.



Show date to when adding evaluation records?

As with **referral records**, you can choose to specify a 'date to' as well as a 'date from' for evaluation records, allowing you to show a duration rather than a single point in time.

Do you want to use cases at all?

Cases in Lamplight are a way to link different pieces of work. A case has a name, description and start and end dates. There are also three types of category that can be used to label cases, and these can be specified in the System Administration menu depending on your needs. Any type of record or communication (if you have the communications module) can be added to a case, as well as records pertaining to different work areas.

For example, a case could contain a referral record, initial evaluation forms, baseline outcome measures, and records of each meeting or group session, including the ones scheduled for the future. At the end of the case, it could be linked to final evaluation forms and closing outcome measures and contain the record of an onward referral before being given a closing date. It could exclude records that did not pertain specifically to the case in question, for example if the individual accessed a separate service during the period.

Cases can usefully identify which people are currently receiving a service. They can also make it easy to view which work records pertain to a particular subject or referral. There can be multiple cases open at once for each service user. Existing records can be linked to cases, and records can be unlinked as well.

Do you want to be able to set open dates of cases manually?

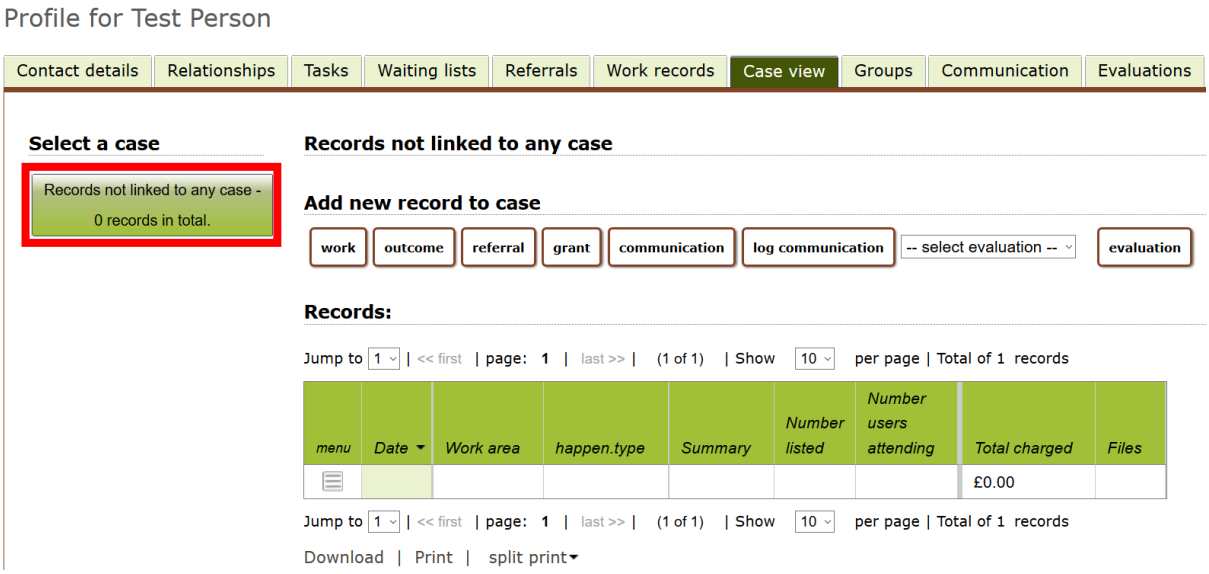
By default, this option is enabled, allowing the start date of cases to be specified, much like it is in work records. If you always want the start date of the case to be when it was entered onto the system, or if it is not important for your service to record a start date for a case, disabling this option will make data entry simpler when opening cases.

Do you want the case tab on profiles?

The ‘case view’ tab on profiles allows you to see any cases (active or inactive) relating to the profile, and provides a convenient place to see information about a case and a list of records linked to the case, as well as quickly create new records linked to it. If you are not using cases in this way, you can turn off this profile tab using this option. It is still possible to access cases through the main menu at work>view>cases.

If so, you can specify a custom template for the "unlinked records" button here

If you have the case tab enabled on profiles (see option above), there is a button above the list of cases that shows all records not linked to a case. You can specify what text to appear in this button using the codes outlined in global settings menu.



Custom template for the open case buttons

As with the option above, it is possible to specify what text should appear in the open case buttons. You will need to have specified a custom template for unlinked records for this to take effect.

Custom template for the closed case buttons

As with the two options above, it is possible to specify what text should appear in the closed case buttons. Again, you will need to also specify a custom template for unlinked records for this to take effect.

Data tables: work and similar records

Do you want data tables to display full details?

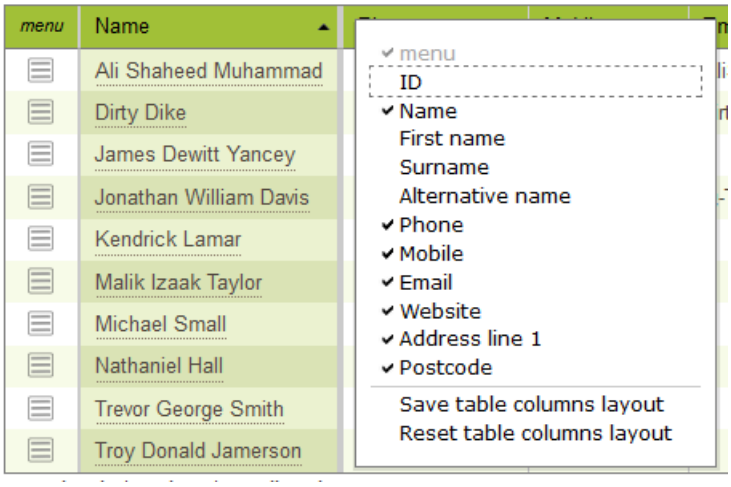
This option changes the default table layout in tables where profiles are listed (for example in people>view>service user>all) to include ‘First name’, ‘Surname’ and ‘Alternative name’.

menu	Name	First name	Surname	Alternative name
	Jonathan William Davis	Jonathan	Davis	Q-Tip
	Dirty Dike	Dirty	Dike	
	Nathaniel Hall	Nathaniel	Hall	Afrika Baby Bam
	Troy Donald Jamerson	Troy Donald	Jamerson	Pharoahe Monch
	Kendrick Lamar	Kendrick	Lamar	
	Ali Shaheed Muhammad	Ali	Muhammad	

If this option is not selected, only the ‘Name’ field will be displayed by default.

menu	Name
	Jonathan William Davis
	Dirty Dike
	Nathaniel Hall
	Troy Donald Jamerson
	Kendrick Lamar
	Ali Shaheed Muhammad

It will remain possible to change columns displayed in these tables individually using the contextual menu shown when right-clicking on the table header.

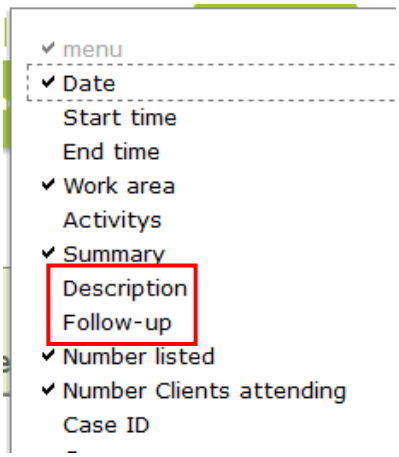


Do you want data tables to display case details?

If you select this option, your work>view tables (e.g. work, outcomes etc) will automatically display case information when they open. The fields include case ID, case name and case open. If this box is left unticked it is still possible to choose to view these columns by right clicking on the table header row and ticking the options that you wish to include.

Do you want work data tables to add hidden columns for description and follow up text?

Choosing this option will add 'description' and 'follow-up' options to the header of the work>view>work table, so that you can view any information added to those work record fields. It will also add a 'referral description' option to the work>view>referrals table, which displays information from the direction, success and notes fields of referral records.



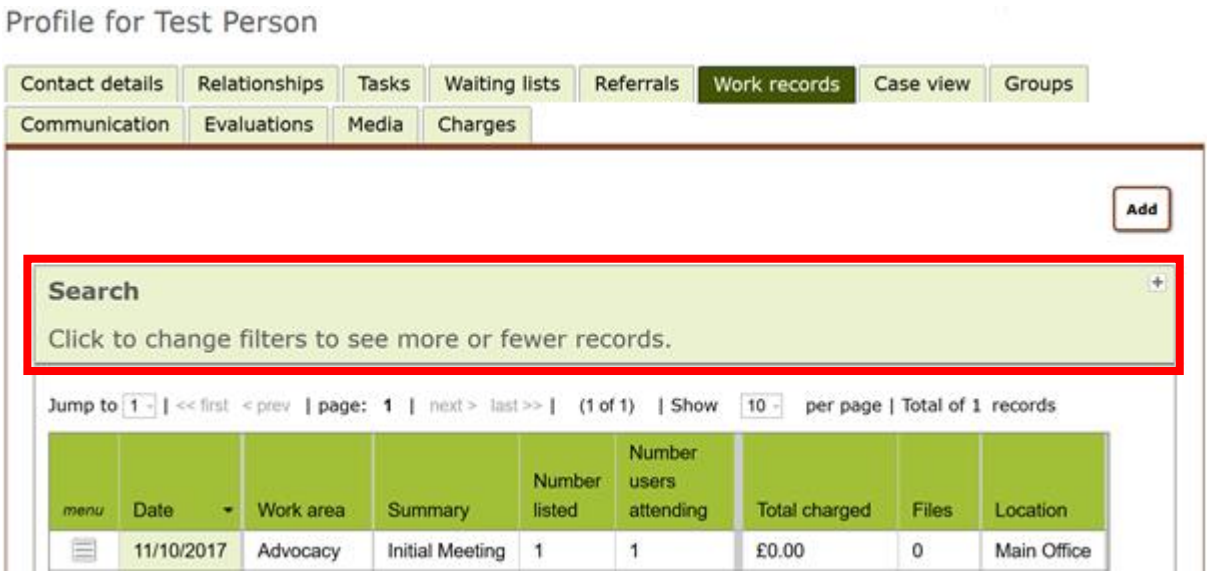
Do you want data tables to display locations?

This option governs whether there is a 'Location' column in the tables accessible through work>view in the main menu. Enabling these can be useful as it allows the entries to be sorted by location (by clicking on the column header).

menu	Date	Work area	Summary	Location
	11/10/2017	Advocacy	Initial Meeting	Main Office

Do you want search bars within profile tabs (for work, referral, grant, communication and evaluation tabs)?

This option enables the search bar in each of the listed profile tabs. Clicking the search bar will expand it to show options that can be used to filter the results displayed in the table below. It will also allow you to add certain extra data columns. This option can be useful if you have many records linked to profiles and need to filter them to get a useful view of the data.



Note that having the search bar available can confuse database operators using the system for the first time, as tables will only show records within a date range (this is set by default to show two months in the past and two months in the future), which can lead to people thinking their old data has disappeared. When this option is disabled, all records are shown.

Data tables: people

How do you want lists of people sorted by default?

This option changes how lists of people are sorted in tables such as the ones accessible via people>view in the main menu. Irrespective of this setting, it remains possible to change the way profiles are sorted by clicking on the column headers. This option simply changes the way they are presented before you click anything, potentially saving time if you always want profiles listed in a certain order.

Do you want to sort names by full name or surname, firstname?

It is advised that you make your selection of how you want lists sorted from the field above, and then you will not need to use this one.

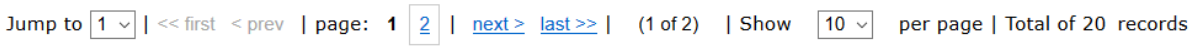
In what order do you want lists of people sorted by default?

This setting determines whether results are sorted in ascending order (i.e. from lowest to highest value, or from A to Z) or descending order (i.e. from highest to lowest value, or from Z to A). It is used in conjunction with the setting **How do you want lists of people sorted by default?** to decide how results are displayed in tables. You can reverse this order whenever viewing a table by clicking on the table column header. Clicking again will reverse the order.

Data Display: Miscellaneous

How many rows per page do you want your tables to display?

This determines how many items appear on each page when tables are displayed. If there are more records that can be shown on one page, the options above the table (as shown below) allow you to navigate to other pages of results.

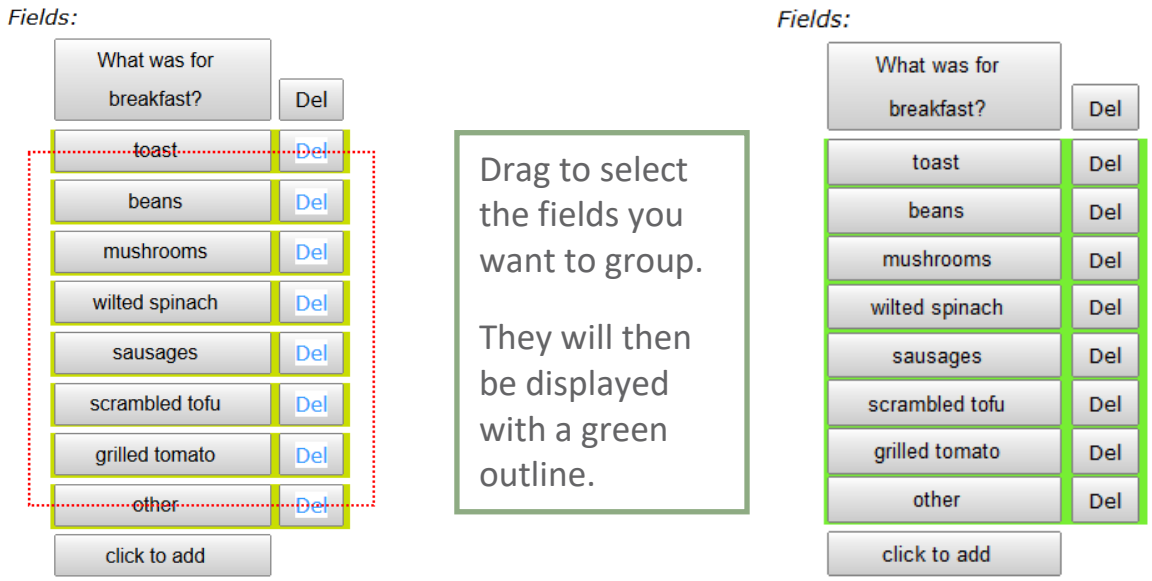


Choosing a lower value can speed up loading times and might be preferable if you are using an older computer or a mobile data connection. Higher values will mean more results are displayed on each page, giving you access to more results in one place.

As you can see in the image above, once you've run the table you still have the option to display different numbers of results on each page. This setting simply governs the default behaviour.

Should custom field tables display date the data was added?

It is possible to turn groups of custom fields into tables. This can be useful if you want to add sets of data on numerous occasions. This is achieved in the custom tabs and fields editor by clicking and dragging a box around a series of fields, as shown here.



Once grouped, fields are displayed with a green box around them to show that they have been made into a table. This can be undone by simply dragging another box around the same items.

These fields will then be displayed as a table, as shown here.

What was for breakfast?

beans	*mushrooms*	*wilted spinach*	*sausages*	*scrambled tofu*	*grilled tomato*	*other*	*Edit row*	*Delete row*
yes	yes	yes	2	yes	yes	smoky courgette 'rashers' and a cup of tea	Edit	Del

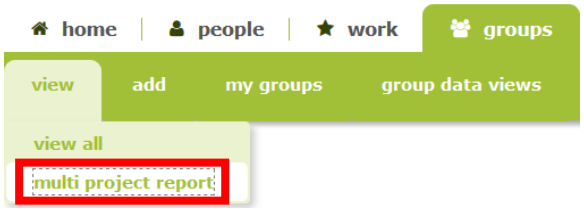
Enabling the global setting for custom field tables to display date the data was added will add an extra column to the table to record the date of the entry, as shown here.

What was for breakfast?

beans	mushrooms	wilted spinach	sausages	scrambled tofu	grilled tomato	other	Date added	Edit row	Delete row
yes	yes	yes	2	yes	yes	smoky courgette 'rashers' and a cup of tea	23/08/2017	Edit	Del

Do you want to enable multi-project group reports?

This option enables multi-project group reports. They can be accessed through groups>view>multi project report, as shown here.



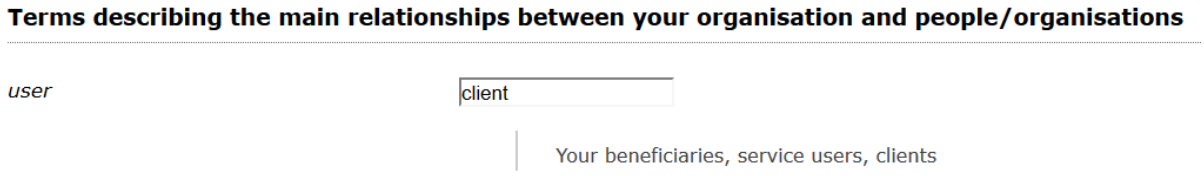
This allows database operators who have access to more than one project to use a group data view to present information about a group across multiple projects. This is only applicable to auto-groups, as manual groups cannot be shared across projects and, of course, the group criteria must be such that profiles across those projects will be included.

Do you want to translate the terms used in Lamplight to your own preferences?

Selecting this option will enable a menu item in admin>system administration>Customise Lamplight called 'change terms used in Lamplight', as shown here.

This extra menu allows some terms in Lamplight to be translated for all users, so that instead of the default term another is used. This can help database operators to match the functions of the system to the way they work, and therefore navigate their database more easily.

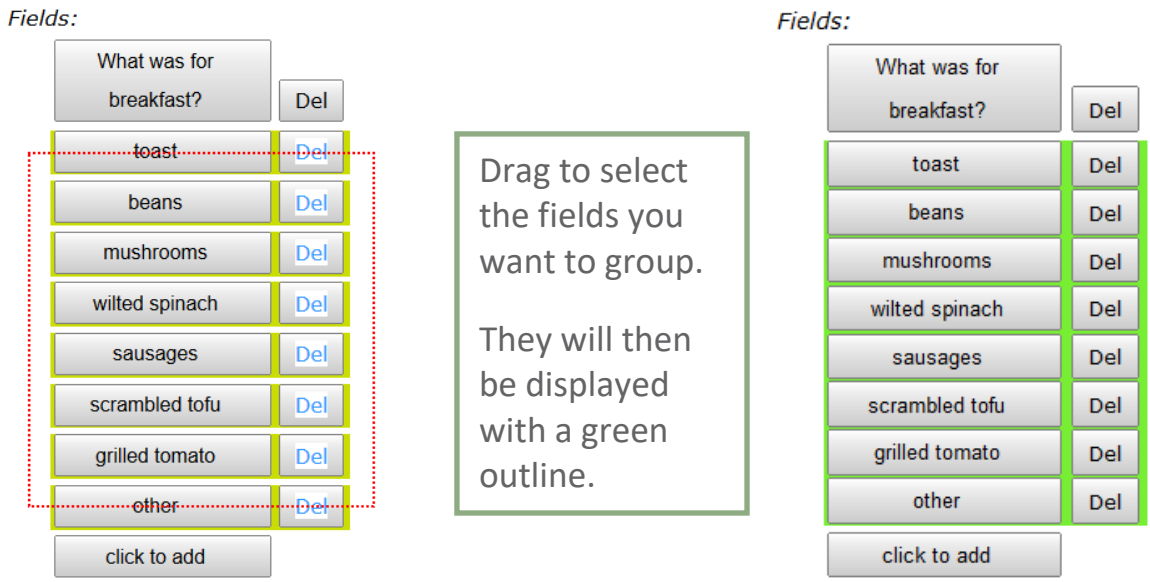
For example, if you refer to those who use your services as clients rather than users, you could enter ‘client’ into the box corresponding to ‘user’ to translate that term throughout your system.



These translations occur in many places across the system, so the term will be the same throughout.

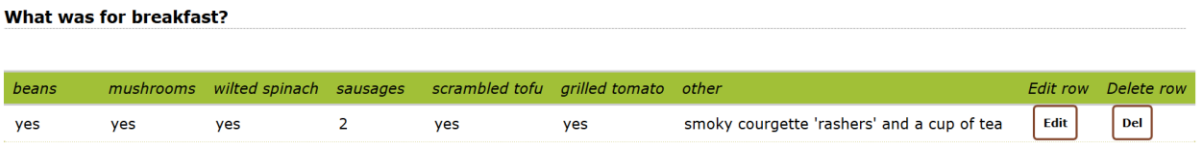
Should custom field tables display date the data was added?

It is possible to turn groups of custom fields into tables. This can be useful if you want to add sets of data on numerous occasions. This is achieved in the custom tabs and fields editor by clicking and dragging a box around a series of fields, as shown here.



Once grouped, fields are displayed with a green box around them to show that they have been made into a table. This can be undone by simply dragging another box around the same items.

These fields will then be displayed as a table, as shown here.



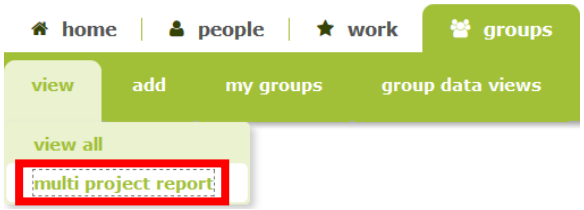
Enabling the global setting for custom field tables to display date the data was added will add an extra column to the table to record the date of the entry, as shown here.

What was for breakfast?

beans	*mushrooms*	*wilted spinach*	*sausages*	*scrambled tofu*	*grilled tomato*	*other*	*Date added*	*Edit row*	*Delete row*
yes	yes	yes	2	yes	yes	smoky courgette 'rashers' and a cup of tea	23/08/2017	Edit	Del

Do you want to enable multi-project group reports?

This option enables multi-project group reports. They can be accessed through groups>view>multi project report, as shown here.



This allows database operators who have access to more than one project to use a group data view to present information about a group across multiple projects. This is only applicable to auto-groups, as manual groups cannot be shared across projects and, of course, the group criteria must be such that profiles across those projects will be included.

Default reply-to email address

Unless an email address is specified here, replies to emails sent using Lamplight will be sent to the email address of the person sending the communication, i.e. the address they use to log into Lamplight. An email address entered in this box will be used instead, and this will apply to all users. If you want all replies to be addressed to a central email inbox, specify it here.

Default reply-to mobile number (for SMS)

This option allows a telephone number to be specified for replies to SMS messages sent through Lamplight.

Allow international mobile phone numbers?

By default, mobile phone numbers are expected to be UK mobile numbers, and it is not possible to save invalid numbers. Selecting this option means that mobile numbers must instead be formatted in the international style (e.g. +44 79XX XXXXXX).

Staff member to receive unsubscribe notifications

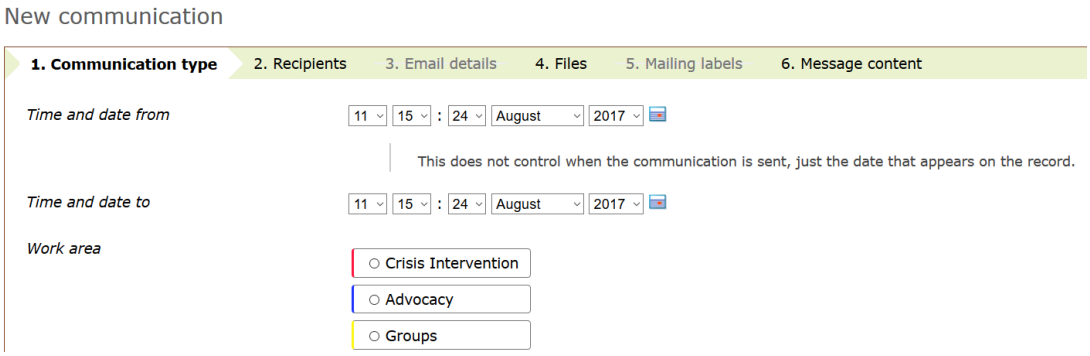
When emails are sent through Lamplight an unsubscribe link is appended to all messages. If this is clicked, the staff member specified will receive a task notifying them that the profile has asked to be removed from the mailing list.

Include your signature automatically at the bottom of new communications?

If this option is enabled, the database operator's name will automatically be added to the message content when creating new communications, saving them from typing it at the end of each communication.

Show date and work area on communications?

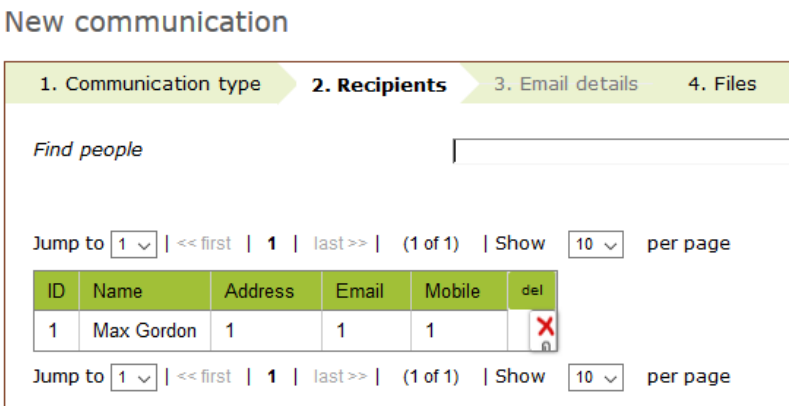
This option governs whether date and work area are to be specified for each communication. These appear in the 'New communication' page as shown here.



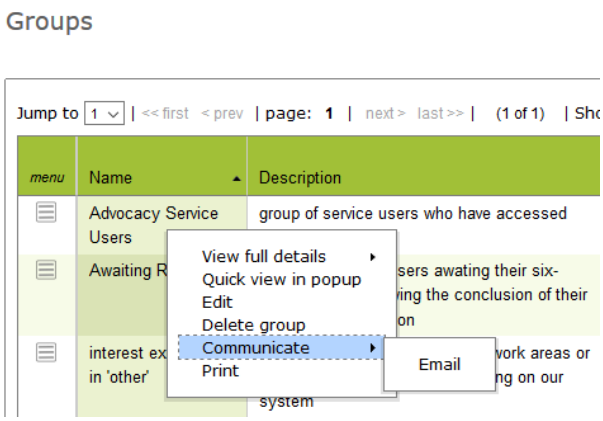
These options provide criteria for filtering information when reporting on communications. If this functionality is not required, the options for new communications can be simplified by disabling this option.

Add me to blank or individual communications?

This option governs whether the profile of the database operator creating a communication will be added as a recipient to communications created using work>communication in the main menu or from the contextual menu of a record, such as a work record, as shown below.



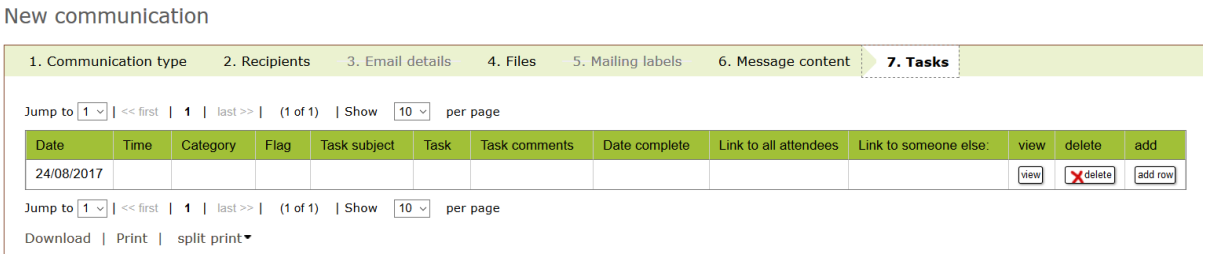
The database operator will not be added to a communication created using the right-click contextual menu from a group (unless their profile is among those in the group), as shown in this image.



If the option is disabled, the database operator's profile will not be added automatically to any new communications.

Add a task tab to communications?

This option adds a 'Tasks' tab to communications so tasks can be associated with communications as they might be other types of record. It appears as shown below.



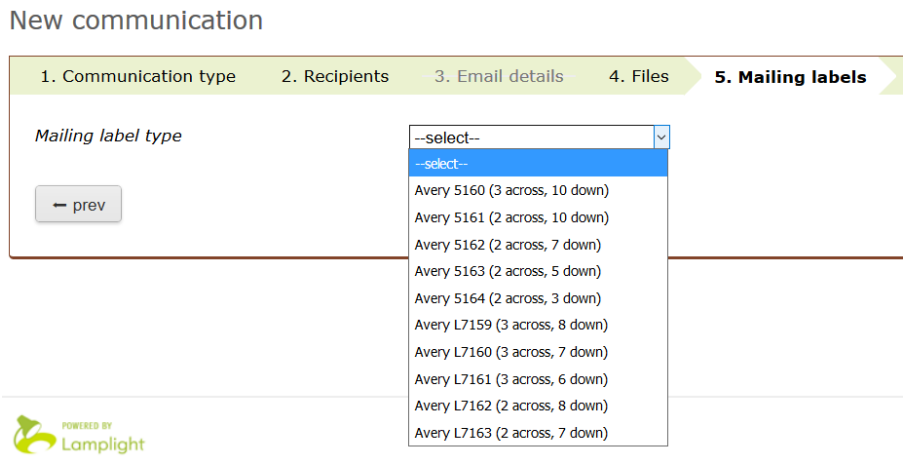
Default address block/text to use when creating mailing labels:

This field allows you to specify the text that is automatically added to the message content field when creating mailing labels. This would usually consist of merge fields. If this field is left blank, the default content is as shown below.

{{First name}} {{Surname}}
{{Organisation name}}
{{Address line 1}}
{{Address line 2}}
{{Address line 3}}
{{Postcode}}

Default mailing label size

When creating mailing labels, there is a tab that allows you to specify the type of label, from a list of standard Avery sizes.



If you know that database operators will usually use the same size label, it can simplify the process to set a default size using this option.

Length of time (in seconds) before automatic logout happens

By putting a number of seconds in the box you can decide the amount of time that a database operator's system is dormant (perceived by Lamplight as not being used) before the operator is locked out. System administrators need to think about data security concerns when setting this time.

Restrict operators below manager level to only view 'my users' they are linked to

'My user' restrictions introduce a much stricter level of access limitations to Lamplight. Within Lamplight, database operators can be linked by a 'My User' relationship with any profile, whether people or organisations (this might be called something slightly different in your system, such as 'my client', or 'my participant'. By adding the My User restrictions to your system, a database operator of staff level and below will only be able to see information about those profiles with whom they have been specifically linked.

Restrict operators below manager level to only view work and case records linked to the "my users" they are linked to

This will further restrict the information that staff can see. This applies to database operators with a staff level of access and below, and would mean that when going to work>view in the main menu, they would only see records where a person linked to them as 'my user' was listed in the attendance table. When viewing an individual record from the list, they would also not see the names of any other attendees who were not linked to them as a 'my user'.

If using "my users" restriction above, should newly added profiles be made a "my user"

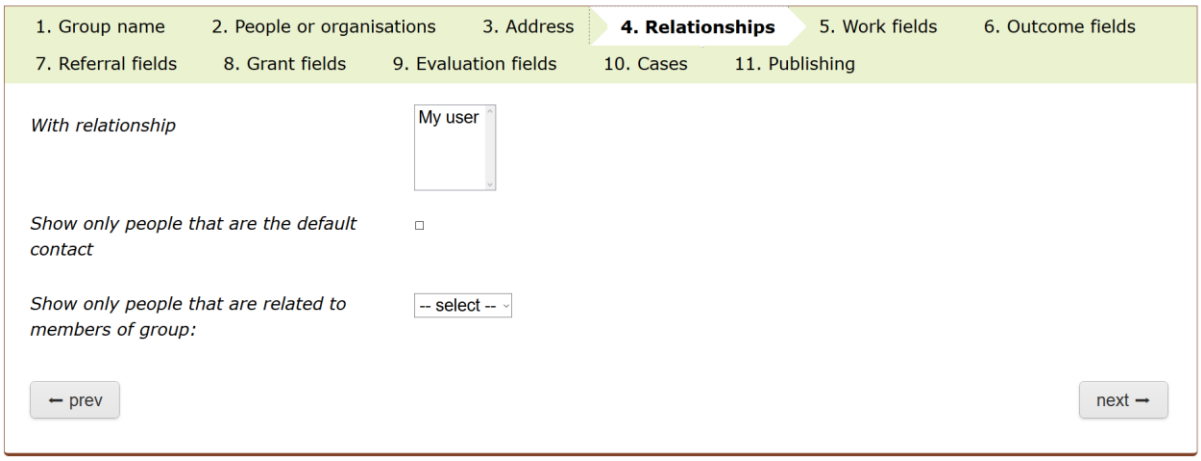
If this option is selected, any service user that a member of staff enters onto the database will automatically be linked to them as a 'my user'. This is useful in cases where staff manage their own caseload, and may be adding in new clients who they are going to work with. It takes away the need for managers to set up the 'my user' relationship for staff. However, in cases where the initial data will be added by a member of staff who does not need to be able to access the records in future, it is best to leave this option unchecked.

Relationships

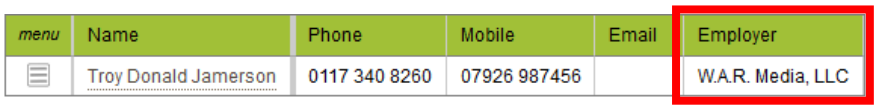
Relationships are a way in which profiles can be linked in Lamplight. Relationships can be:

- used as criteria in auto-groups

New auto group

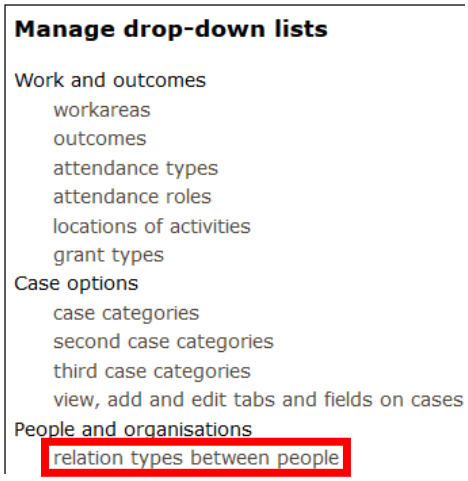


- displayed in group data views, such as in this example, where the relationship type 'Employer' is being used

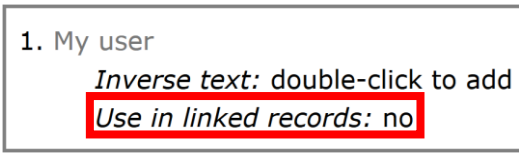


menu	Name	Phone	Mobile	Email	Employer
	Troy Donald Jamerson	0117 340 8260	07926 987456		W.A.R. Media, LLC

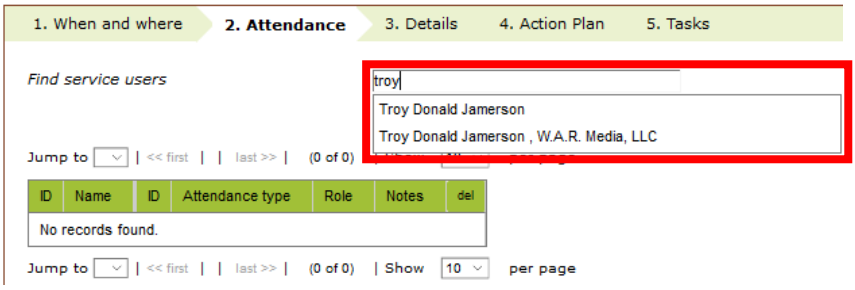
Relationship types are configured in admin>system administration>Manage drop-down lists>people and organisations>relation types between people.



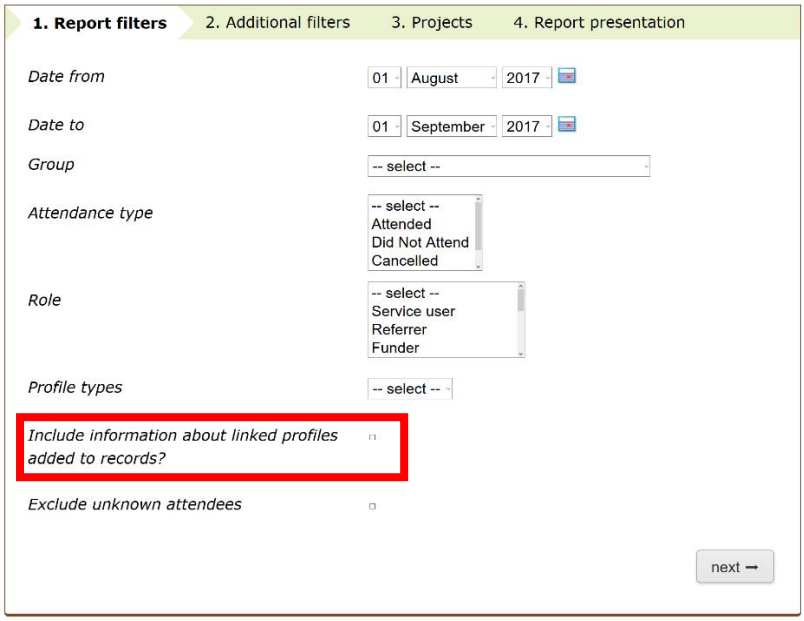
There is an option to use specific relationship types in linked records.



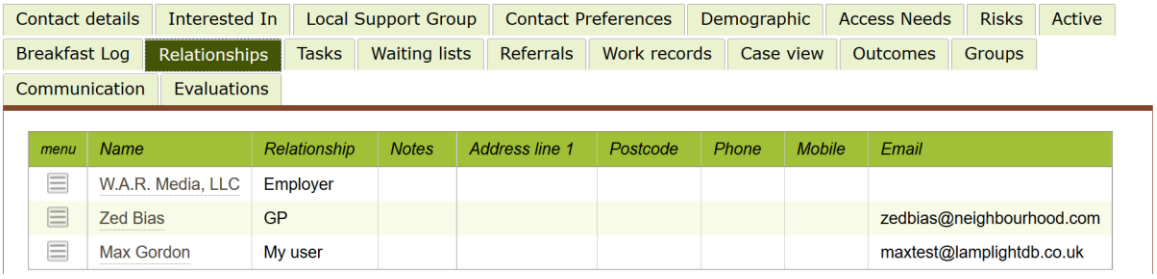
Linked records will be shown as options in the attendance search box so you can add attendees as either individual profiles or linked profiles:



This allows linked profiles to be added to work, outcome or referral records. For example, if three people from the same organisation attended a training event you ran, you could add the three individuals linked to the same organisation to the work record. You could then report both on the number of people who attended (3) and the number of organisations that attended (1).

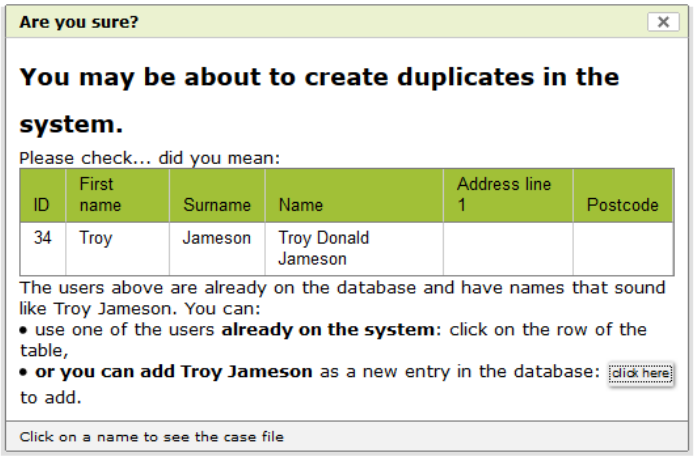


Relationships between one profile and another can be viewed in the profile's Relationships tab.



Identifying Duplicate Profiles

If you try to create a profile using the same name as an existing profile, you will be presented with a dialogue box like this one:



If an existing profile has been found matching the one you are attempting to create, select it by clicking on the entry in the table. If you want to continue to create a new profile anyway, click the button in the bottom-right corner instead.

Be aware that this search function is not foolproof, and the more you restrict the search options (using the setting '**How to check for duplicates when entering new people?**') the more likely it is that you will be able to create duplicate profiles in the system without being alerted. For this reason, we recommend leaving the default option, 'Names which sound similar (but may be spelled differently)' selected.

The 'sounds like' algorithm used is the Metaphone function which is designed to detect similar sounding words in English; it will not be so effective in other languages and will not work in other alphabets.