



New Project
Set-up Guide

Adding a New Project

Thank you for adding a new project to your system. This quick guide will help you set up the new project settings so that you can start adding and editing tabs, fields and records.

When we say we've 'added a new project', what we've done is given you the ability to add a new project to your system. This is because a lot of the decisions about how your new project and existing projects work together are taken as you create it.

To add and amend projects, you'll need to be a Project Administrator. This is a level above System Administrator and is only used when a system has multiple projects. You can't add this level of access yourself but will need to ask Lamplight to do this for you.

You can see your role in the system directly to the right of your name at the top of the screen.

Overview

When you begin adding a project you can choose what (if anything) you wish to copy from an existing project.

Copying profile fields or work areas, for example, will allow you to report on those same profile fields or work areas across both projects. If you simply create a blank project and add a new field, for example 'Gender', even though you may have a field of the same name in another project, because they were created separately they will not be linked in Lamplight (they'll have a different field ID number), so you will have to report on them separately.

What happens when you 'copy' elements of an existing project to a new project is that the records are shared with the new project. For example, if I copy all profile fields, the gender field would be shared across different projects. I can then run one report to show the gender of clients across both projects. However, as the fields are shared, if I delete the gender field in the new project it will delete it across all projects it is shared with.

The normal process to follow would be:

- When you create the project, share the type of fields (profile fields, work areas etc) that you want the projects to have in common
- Then go through and manually unshare any fields which are not appropriate
- Ask Lamplight to unshare any individual areas which you cannot unshare yourself

Adding a new project

Go to the System Administrator page from the main menu, by choosing Admin > System Administration. From here, find the section called 'Manage Projects'.

The 'Add, edit and remove projects' option will take you to a table like this.

Manage projects

Add, edit and remove projects

menu	Project name	id
	Advice	5
	CES demo	6

To add a new project, right click on any existing projects in the table, and when the menu appears click 'Add new'. You'll see this dialogue box.

New form ✕

Project name

Create project profile

Which project to use as the base to copy from (if required) -- select --

Copy profile tabs and fields?

Copy work areas?

Copy Outcomes?

Copy evaluations?

Copy any custom work fields?

save

Project Name

Enter the name of the new project. Although all projects may be part of your organisation, choose a name which distinguishes it.

Create Project Profile

Creating a project profile will create a new profile with that project name, to allow you to assign referrals etc to it.

If you want to have a blank project, and to start it entirely from scratch, simply leave the rest of the options blank and click save. You'll have created a new project.

Copying Settings

If you want your new project to incorporate elements of an existing project you can choose which one to copy settings and information from. Use the drop-down to select a project.

You can then choose which areas to copy across. When you choose an area (for example profile tabs and fields or work areas), it copies *all* that type of information across.

Once completed, click save, and your new project will be created.

Changing Sharing

Now you've set-up your project, you may wish to adjust some of your sharing settings.

Automatic Sharing

Some fields are automatically shared across projects and cannot be unshared. These include:

- Attendance types and roles
- Name title and suffixes
- Referral success and direction categories
- Grant types
- Wards and Boroughs

Non-Shared Fields

Some information can't be shared across projects but can be entered manually in each project. As they are not copied across they won't be shared, and so can't be reported on across projects. If you have a great deal of information to enter, you can ask Lamplight to copy it across for you (however, it still will not remain linked to the initial project). This includes case categories, for example.

Unsharing fields

You can share or unshare custom fields in profiles and work records yourself from the System Administration menu.

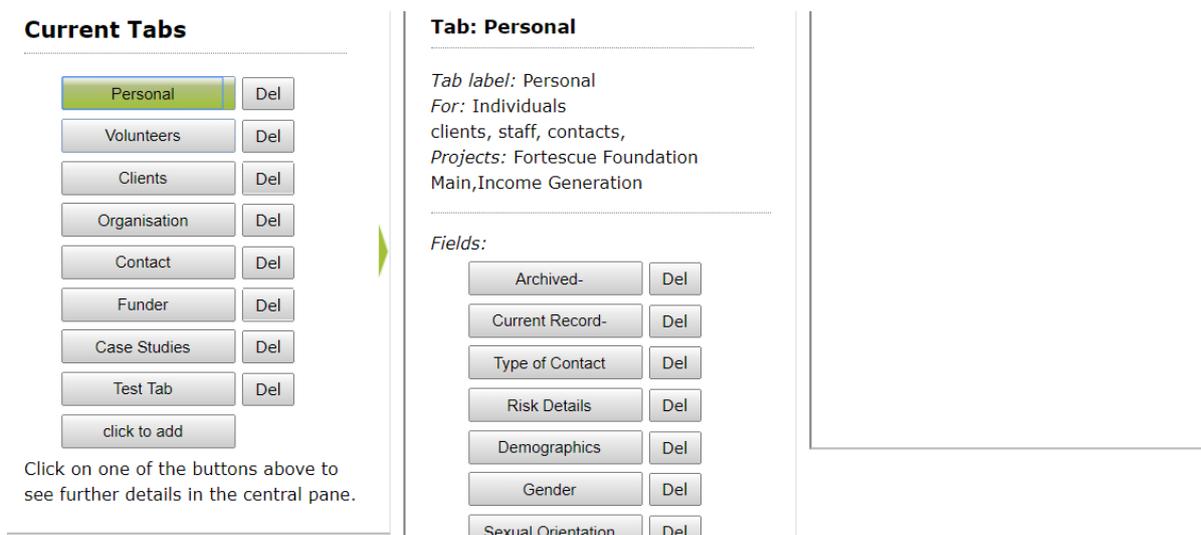
You will find this in the 'Manage Drop-down lists' section. For profile fields, go to 'Profile custom tabs and fields'. Under this select the option 'view, add and edit tabs and fields on profiles'.

When this screen opens, on the left you'll see a list of your tabs.

Manage tabs and fields for profiles



If you select a tab, you'll see new information relating to it appear in the middle column.



Sharing must be enabled both for the field and for the tab it is in. For example, if I share the gender field, but not the 'personal' tab where that field is held, I won't be able to see either the tab or the field in profiles in the second project.

To manage tab sharing, double click in the middle column, on the text 'Tab label:'.

To manage field sharing select the field, then when information appears in the right-hand column, double click on 'Field name'.

Tab: Personal Details

Tab label: Personal Details
For: Individuals
 Clients, staff and volunteers, contacts, volunteers,
Projects: Information and advice, Counselling

Fields:

Gender	Del
Date of birth (approx if not known)	Del
Ethnicity	Del

Field: Gender

Field name: Gender
Type: radio buttons: select-one
For: Individuals
 Clients, staff and volunteers, volunteers,
Projects: Information and advice

Required: No
Access restricted: No
Publishable: No
Options:

Male	Del
Female	Del

Each option will open a dialogue box of options, which will include a list of projects in your system. Simply tick or untick the boxes to enable to disable sharing with that project.

Edit Field "Gender" x

Text

What type of person is this for?

person

organisation

family

Who have which role(s)?

Client
 staff and volunteers
 contact
 organisation

Type

Is this a required field?

Restrict this field to managers/admins?

Should the data in this field be published?

Can the data in this field be added/updated via the publishing API?

Projects

Counselling

Information and advice

You can use this method for any profile custom tabs and fields, as well those in other types of records which can be found in the same 'Manage Drop-down

lists' section of the System Administration page. Be sure to distinguish between custom fields in outcomes, which are extra fields in your outcomes records which you can share yourself, and the outcome measures themselves, which you can't. Evaluations can be managed through the 'Manage evaluations' settings.

Unsharing other fields

There are some fields you won't be able to unshare yourself. If you ask Lamplight, we'll be happy to help. These include:

- work areas
- locations
- outcomes

Changes and warnings for system administrators

Once you add multiple projects, the system administrator role becomes more limited. System administrators are now no longer able to make changes across the whole system. This includes access to global settings, and a variety of other features. These settings can now only be accessed by a project administrator.

It is important for system and project administrators to come to an understanding about what changes they can make in their own projects, and how these will affect other projects. For example, while a system administrator can add a new work area in their project without it affecting others (although as a stand-alone work area it wouldn't be possible to use it to report across projects), if they remove or change a shared work area this will remove it or change it for every project which uses it.

If you are starting a new project from scratch, you may find our guide to system administration helpful too.