



Project Sharing
Set-up Guide

Project sharing

By default, no information is shared between different projects. Project sharing allows you to do so if necessary. You will need to contact Lamplight to enable project sharing if you do require it.

Overview

Project sharing lets you control in detail what information is shared between different projects. You can share profile information and work, outcome, referral, evaluation and communication records. This sharing is controlled by policies that determine which projects the information should be shared with, what information to share, and whether information can be edited in different projects. By default, no information is shared until you explicitly choose to do so.

Setting up work sharing policies

The process of setting up policies is very similar for work and people, but we will deal with work sharing first.

First, go to Admin -> system administration -> Project sharing work etc policies.

As with other lists in Lamplight you'll see current policies.

Manage Sharing policies for work etc data between projects

1. TI Contract <i>Share policy:</i> add policy details
2. Share all <i>Share policy:</i> add policy details
3. view and edit <i>Share policy:</i> add policy details
4. double-click to add <i>Share policy:</i> add policy details

Drag here to delete.

To add a new one, double-click your mouse over the 'double click to add' label at the bottom of the list and enter the name of the new policy. This is what will appear in the drop-down lists that database operators see, so you'll need to make sure the names are clear. When you have done that, press 'enter' on your keyboard to save the policy name.

Next click on the 'add policy details' text that is shown below the policy name. A popup window will appear:

Editing project sharing policy for work, outcome etc records

What should people in other projects be able to do with your data? view and edit data

Database operators with the following role will have these rights: manager

Projects

- BME Infrastructure Support
- Next Town CVS
- Second tier demo

Make this policy available for use in all projects?

Save

You now need to set the various options that define this policy:

- What can database operators in other projects do with the data you're sharing?
This could be view it only, view and edit or view, edit and delete records
- Which database operator role the rights you're setting up relate to
- Which project(s) will be included in this policy – to select more than one just hold down ctrl on your windows keyboard (command on a Mac) and then click the options that you want to select with your mouse
- If you want all projects to be included in the policy, just choose the 'make policy available for use in all projects' checkbox

Click 'save' when you're done. This policy is now available for use.

Setting up profile sharing policies

Follow the same procedure as given above for sharing work records.

When adding policy details, the options you see will look like this:

New project sharing policy for people records

New project sharing policy for people records

Type of person If you select something here, you will only be able to use it with that type of profile.

Role of person If you select something here, you will only be able to use it with that type of profile.

What should people in other projects be able to do with name and address details?

What should people in other projects be able to do with custom tab and field data?

Database operators with the following role will have the above rights:

Which projects to share with?

Make this policy available for use in all projects?

The options to choose from are:

- Type of person / role of person. This relates to how they are set up on the system – a person who is a staff member, for example. You do not need to choose anything here, but if you do it will limit the sharing policy to that type of profile
- What should be people in other projects be able to do with name and address details? This gives several options for what operators in other projects can do with shared names and contact details
- What should people in other projects be able to do with custom tab and field data? This gives several options for viewing, adding and editing these shared fields
- Database operators with the following role will have the above rights. This lets you set the role of the DB operators to whom these policies will apply.
- Which projects to share with – to select more than one just hold down ctrl on your windows keyboard (command on a Mac) and then click the options that you want to select with your mouse
- If you want all projects to be included in the policy, just choose the ‘make policy available for use in all projects’ checkbox.

Using profile sharing policies

You can share profile information at the point of adding a new profile, or change it at any time through the project sharing tab.

If you have project sharing enabled, then when adding a new profile you will see an additional drop-down box: 'Select project sharing policy'. You will have to select something from this drop-down, but the second option is always 'No sharing'. Other policies set up by your system administrator will appear below this: please check directly with them if you are unsure about which to use.

Each profile has a project sharing tab which will look different depending on whether the profile has been shared. If it is not currently being shared, it will look like this one:

Profile for Advocacy Organisation Print Del Edit

Contact details Relationships Organisational Details Invoicing and Payments Membership Details VCS Further Details

Work records Case view Outcomes Groups Communication Evaluations **Project sharing** Publishing

Project sharing

Operators in Second tier demo have access dictated by their role.
This profile is not shared with any other projects.
To start sharing this person with other projects, select the sharing policy you would like to use:

Select policy

Save

To start sharing this profile, choose a policy from the drop-down list and click 'save'.

Once a profile is being shared, it will look more like this:

Profile for Advocacy Organisation Print Del Edit

Contact details Relationships Organisational Details Invoicing and Payments Membership Details VCS Further Details

Work records Case view Outcomes Groups Communication Evaluations **Project sharing** Publishing

Project sharing

Operators in Second tier demo have access dictated by their role.
Operators in the following projects:

- BME Infrastructure Support
- Next Town CVS

with role **manager** or above, have the following permissions:

- view and edit name and address
- view and edit custom fields

These permissions are based on **View and edit** sharing policy.

Revoke project sharing

To revoke, click here to confirm:

Save

This screen explains who and what is being shared. To stop sharing this profile, tick the 'revoke project sharing' checkbox and click 'save'. Other projects will now have no access to the profile.

Using work (and other activity record) sharing policies

If you have project sharing enabled, when adding a new work record you will see an additional drop-down box: 'Share this record with other projects'. You will have to select something from this drop-down, but the second option is always 'No sharing'. Other policies set up by your system administrator will appear below this: please check directly with them if you are unsure about which to use. Continue adding your work record details as usual.

When you view a work record, you'll see a 'sharing' section near the bottom, which if it's not being shared will look a bit like this:

Sharing

Operators in Second tier demo have access dictated by their role.
This record is not shared with any other projects.

Added by Matt Parker on 10/11/2011, project: Second tier demo

If a record is being shared, it will look more like this:

Sharing

Operators in Second tier demo have access dictated by their role.
Operators in the following projects:

- BME Infrastructure Support

with role **manager** or above, have the following permissions:

- view and edit record details

This screen explains the effect of the sharing policy - what and with whom it is being shared. To change this you will need to open the work record to edit it, go to the 'when and where' tab and select a different option in the sharing drop-down.

If you share a work record but have not shared the profiles of the people attending, then when someone views the work record in another project they will not see the names of the people - just blank rows. However, if you have shared both the people and work record they will be visible, and the work record will be listed in the work tab of the shared person's profile.