



Publishing Module Set-up Guide

Thank you for adding the publishing module to your system. Publishing is different to every other module in that rather than adding sections within Lamplight that you can then use, it adds the ability to connect a website or application to Lamplight using your Lamplight API.

There is a micro-site that gives you examples of what can be done with the Publishing Module—you can find it at <http://www.lamplight-publishing.co.uk/>.

You'll need an API key to get started, and you can find that in the 'Publishing settings' section below.

To adjust publishing settings, you'll need to have a System Administrator role. You can see your role in the system, directly to the right of your name at the top of the screen.

Go to the System Administration menu, by clicking on Admin in the main menu, and then choosing 'System Administration' in the menu bar itself.

Publishing settings

Locate the section called 'Manage Publishing' and click on the 'Manage publishing settings' options.

Manage Publishing

The publishing module lets you publish certain information from Lamplight to other places (e.g. websites). These settings control what kinds of data may be published. The search index is used for free-text searches of published information. It will need to be rebuilt when you change publishing settings or fields that are publishable.

- Manage publishing settings
- Rebuild publishing search index - people and orgs
- Rebuild publishing search index - work

In this page are several tabs controlling how publishing works within the system. None of these tabs publishes information, but simply sets permissions for what information can be published.

Configure Lamplight publishing settings

1. Overall publishing details	2. People	3. Organisations	4. Work	5. Referral	6. Projects	7. API key and details
Do you want to publish people or organisation details at all?	<input checked="" type="checkbox"/>					
Do you want to allow new profiles to be created?	<input checked="" type="checkbox"/>					
Do you want to allow existing profiles to be updated?	<input checked="" type="checkbox"/>					
Do you want to publish work details at all?	<input checked="" type="checkbox"/>					

Overall publishing details

This controls what sort of information can be published and updated from an external site. Simply select the options you want.

People and Organisations tabs

'People' refers to any profile in Lamplight which is added under 'People > add person' in the main menu. The Organisation tab identifies profiles which were added as organisations. If you have families activated as a role, there will also be a 'Families' tab. You can use this tab to identify:

- which roles can be published
- what details to publish
- what information can be added to Lamplight from a website/application
- what information can be updated within Lamplight from a website/application

Work and referral tabs

You can use these tabs to identify exactly which parts of the work or referral records can be published, and which information can be added to these records from an external site. This is just the permission for parts of records to be published, but each work or referral record will also need to be published manually as you create or edit it.

Projects

If you have multiple Lamplight projects, this identifies which projects will allow publishing.

API key and details

This section gives you the API key you will need to access Lamplight remotely. Give these details to your programmer.

To generate a new API key, click the checkbox here and choose 'save'. This will generate a new key, and previous keys will no longer function. You'll need to update your applications and programming once you've done this.

Additional profile data

As we've seen, 'managing publishing settings' in system administration allows you to decide what main profile data to share to an external website. You can however also publish custom profile data (unique to your system's set-up). You will need to alter settings to identify which fields should be published.

Go to System Administration by clicking 'admin' in the main menu, and then choosing 'System Administration' in the menu bar, and then click 'Profile custom tab and fields: view, add and edit tabs and fields on profiles'.

Profile custom tabs and fields

view, add and edit tabs and fields on profiles

Locate the field you wish to alter by clicking on the relevant tab in the left-hand column, then clicking on the field itself when it appears in the middle column. To edit the field, double click over non-bold text 'Field details'. In the pop-up box, you can choose if this field should be published, and if it can be added to or altered via the publishing API by ticking the relevant check boxes. When you've made the alteration(s), click to save.

Text	Ethnicity
What type of person is this for?	<input checked="" type="radio"/> <i>person</i> <input type="radio"/> <i>organisation</i> <input type="radio"/> <i>family</i>
Who have which role(s)?	<input type="checkbox"/> contact <input type="checkbox"/> organisation <input type="checkbox"/> Funder <input checked="" type="checkbox"/> volunteer
Type	radio buttons: select-one
Is this a required field?	<input type="checkbox"/>
Restrict this field to managers/admins?	<input type="checkbox"/>
Should the data in this field be published?	<input type="checkbox"/>
Can the data in this field be added/updated via the publishing API?	<input checked="" type="checkbox"/>
Projects	<input type="checkbox"/> <i>Counselling</i> <input checked="" type="checkbox"/> <i>Information and advice</i>

Using publishing day-to-day

Profiles

In every profile, there will now be a 'Publishing' tab. In this tab you will be able to see whether the profile *can* be published, whether it *is currently* published, and whether the profile can be updated via the Publishing API.

Profile for Advocacy Organisation

Contact details	Relationships	Organisational Details	Membership Details	VCS Further Details	Funding Criteria	Tasks	Volunteering opportunity
Media	Project sharing	Publishing					

Publishing settings for this profile

Can this be published : Yes

Currently published (double-click to edit) : Yes

Data that's published (in short):

Publish summary (double-click to edit): We work to help people understand and vocalise their own needs; and support them to get those needs met.

Id : 47

Name : Advocacy Organisation

If it has been published, you will see confirmation of what will be shared.

Work Records

Work records are set-up so that they are *not* published by default. This is to ensure that confidential information isn't accidentally published. You can choose to publish them either when you're adding a new record or by going to in edit an existing one. Once the record is open, click on the 'Publishing' tab and you will see these options.

New work record

1. When and where	2. Attendance	3. Details	4. Publishing	5. Tasks
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Publish this record via Lamplight API?

Title of record for publishing

Do you want to allow the addition of attendees through the Lamplight API

Maximum number of users allowed

Publish this record via Lamplight API?	Allows this individual record to be published
Title of record for publishing	Give the record a title, which you can use when publishing
Do you want to allow the addition of attendees through the Lamplight API	Will allow people to add themselves to an activity or event through your site / app, if configured to do so
Maximum number of clients allowed	If people can add themselves to the record through your site, this sets a maximum number who will be accepted

You're now ready to start using the Publishing API to set-up publishing from and to Lamplight.