Waiting List Module
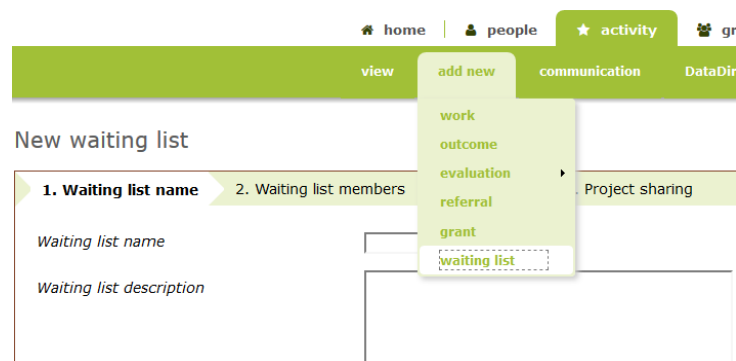# Set-up Guide

Thank you for adding the waiting lists module to your system. Now it's added, you can start using it right away.

Unlike other modules in Lamplight, there is not a requirement for system administrators to make any 'back-end' changes. Waiting lists can be added like other records in the system, however you may wish to discuss their use as a team first.

You create a new waiting list from the main menu. In the main menu, choose 'Activity > add new > waiting list'. This will open a new page with several tabs. We'll look through each in turn.

Tab 1: Waiting list name

Give your waiting list a descriptive name and add a fuller description. The clearer this is the better for everyone using it (so that it is clear which one to use).

Tab 2: Waiting list members

If you want to, you can add people to the waiting list as you create it. This isn't necessary - if you are just setting up the initial structure of the waiting list you can add people later

To add people to the list simply use the search box in the top middle of the page to add names, or groups of names.

Tab 3: Removal

You can choose to remove people automatically from a waiting list if they attend a particular workarea or sub-workarea, or a referral record.

Work record auto-removal

To activate auto-removal based on a work records, select the checkbox titled 'Remove people from waiting lists automatically when they attend a work record'.

You then choose the work area and sub work areas to which this applies. You can select more than one work area or sub-work area (as soon as you select a sub-work area, the auto-removal will only apply to the selected sub-work area/s, and not the whole work area).

If you choose not to select a workarea at this point, the people on the waiting list will be automatically removed when they 'attend' *any* work record.

Referral record auto-removal

Selecting the 'Remove people from waiting list automatically when they attend a referral record?' checkbox will remove someone from the waiting list when they are involved in any referral, whether a referral 'in' to you, or a referral out.

Alerts

You can choose to alert a database operator when someone has been on the waiting list for more than a certain number of days, weeks, months or years. The alert will take the form of a notice in your 'Diary' page.

In the field starting 'Alert me when…', select days, weeks, months or years from the dropdown, and then add the appropriate number in the text box. For example, if you select months and then enter '6', it will alert you after six months.

Alert me when someone has been on the waiting list for more than...	2	weeks ˅
Who to alert?	Sam Samuels ˅	
Target time for people to be removed from the waiting list by	3	days ˅

The drop-down 'Who to alert?' field lets you choose which member of staff (Database Operator) to alert. Simply select the appropriate person from the list.

You can also set a target time for people to be removed from the waiting list by. Once a person has passed this target time they will be coloured in red on the waiting list. Choose from 'days, weeks, months, years' in the drop-down list, and enter the appropriate number in the text box, as with the previous section.

Tab 4: Project sharing

If you have multiple projects, you'll see an additional 'Project sharing' tab, letting you choose which projects this waiting list will be available for. It's important to note that although different projects will be able to use this list when shared, each project will have its own list, and the names in the list will remain within, and confidential to, each project.

Once you've completed all the relevant fields, click 'save'. This waiting list is now available for all database operators to use.

You can add people to the list directly from a referral record, by going to 'activity > view > waiting lists' from the main menu, or from the 'Waiting lists' tab in a profile.

Final notes

Within each profile you will have a 'waiting list' tab.

menu	Waiting list name	Description	Date joined	Date left waiting list	Length of time on waiting list	Notes	Waiting list size
	Grant applications	Waiting to hear whether grant application in successful	05/12/2016		63 weeks and 1 day		4
	Been referred waiting for allocation	Been referred waiting for allocation	20/02/2018		3 hours		9

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Project sharing | Core 34 | Core 10

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If this doesn't appear, each database operator may need to ensure they have it selected to be visible. This can be checked via 'admin > system administration > change my personal settings'.