

# MANAGING YOUR WORK TRAY

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## Managing Tasks in your work tray

The Home screen is mostly used for accessing records, tasks and alerts in work trays. To view the trays you have access to click on the Task Trays icon

User Gurpreet Kumari Centre Professional Practice	Task Trays	
All Empty <b>T A F</b> Gurpreet Kumari 0 Manager Tray	Group By: Date   Task   Priority   Person   Add This Task Tray is Empty	ress   Referral Group Order By: Start Dat

You will have access to your own work tray, this will be located at the top of the trays list on the left of the screen. This will hold a list of tasks and alerts assigned to yourself.

User Gurpreet Kumari Centre Professional Practice	Task Trays	
All Empty <b>T A F</b> Gurpreet Kumari 0	Group By: <b>Date</b>   Task   Priority   Person   Addre This Task Tray is Empty	ess   Referral Group Orde
Manager Tray		
Duty Tray46MASH Manage2		

When a tray has lots of tasks and alerts, it is important to know how to sort and group items in different ways to help prioritise your work. Trays can be grouped a variety of ways. By date is a common choice e.g. group overdue tasks together or group by Person e.g. grouping tasks for each pupil together within a work tray.

User Gurpreet Kumari Centre Professional Practice	Task Trays		
All Empty 🔻 🔍 🖡	Group By: Date   Task   Priority   Per	son   Address   Referral Group Order By:	Start Date   Due Date   Timeframe   Subject   Priority
💄 Gurpreet Kumari 0	• March (1)	Person	Task Description
😫 Manager Tray	01-Mar-2020	Flower1, William 15 yrs [Ref: 700859]	Child Protection - Complete Review Ch
💕 Duty Tray 46	• April (8)	Person	Task Description
Standard Manage 2	01-Apr-2020	Flower2, William 15 yrs [Ref: 700862]	Child Protection - Complete Review Ch
Safeguardin 102	01-Apr-2020	Flower3, William 15 yrs [Ref: 700867]	Child Protection - Complete Review Ch



You should have access to colleagues work trays. If you are a line manager of anyone else, you will have access to each of their trays to monitor alerts and outstanding tasks.

User Gurpreet Kumari Centre Professional Practi	ce Task Trays		
All Empty 🍸 🔍 🖡	Group By: Date   Task   Priority   F	Person   Address   Referral Group	Order By: Start Date   Due Date   T
💄 Gurpreet Kumari 0	• Two Months Ago (1)	Person	Task Description
Managor Tray	14-Sep-2020 CIN	test, man 3 mths [Ref: 700003]	Contact - Authorise
✓ Lisa Farrell 2	Last Month (1)	Person	Task Description
Image: Second system46Image: MASH Manage2	30-Oct-2020 CIN	test, man 3 mths [Ref: 700003]	Child & Young Person'

To be able to complete a task in a colleague's tray, you must **Pickup** the task and this moves it from their tray to your own. You would only complete colleague's tasks when appropriate to do so.

User Gurpreet Kumari Centre Professional Practice	Task Tray	s 🖸 🗠 🤷		
All Empty 🔻 🔍 🖡	Group By: Date   Task   Priority	Person   Address   Referral Group	Order By: Start Date   Due Date   Timeframe   Subject   Priority	0 0
Surpreet Kumari 0	• Two Months Ago (1)	Person	Task Description	
💁 Nanager Tray	14-Sep-2020 CIN	test, man 3 mths [Ref: 700003]	Contact - Authorise	Pickup
Lisa Farrell 2	Last Month (1)	Person	Task Description	
🎒 Duty Tray 46	30-Oct-2020	test, man 3 mths [Ref: 700003]	Child & Young Person's Assessment - Please do C	. Pickup
SMASH Manage 2				

You may also have access to some Group Trays. These are trays accessed by a group of people for example when tasks are sent for authorisation or when tasks are sent for allocation. Like colleague trays above, you must pick up tasks from here in order to progress or complete them.

User Gurpreet Kumari Centre Professional Practice	e Task Trays		
All Empty <b>T A</b>	Group By: Date   Task   Priority   F	Person   Address   Referral Group C	Order By: Start Date   Due Date   Timeframe   Subject   Prio
💄 Gurpreet Kumari 🛛 0	• Two Months Ago (1)	Person	Task Description
🔮 Manager Tray	14-Sep-2020	test, man 3 mths [Ref: 700003]	Contact - Authorise
Lisa Farrell 2	Last Month (1)	Person	Task Description
Duty Tray 46 MASH Manage 2 Safeguardin 102 Safeguarding 65	30-Oct-2020 CIN	test, man 3 mths [Ref: 700003]	Child & Young Person's Assessment - Please



The system will automatically hide empty trays, to view empty trays click the Empty button, to hide those trays click **Empty** again.

User Gurpreet Kumari Centre Professional Practic	e Task Trays	
All Empty 🔻 🔍 🖡	Group By: Date   Task   Priority	Person   Address   Referral Group Ord
Surpreet Kumari 0	C Two Months Ago (1)	Person
Manager Tray	14-Sep-2020 CIN	test, man 3 mths [Ref: 700003]

You are able to configure which of your tray subscriptions you do and do not wish to view e.g. turn off trays until you are asked to cover another colleague's work. Click the orange spanner to navigate to the tray configuration screen

User Gurpreet Kumari Centre Professional Practice	Task Tray	s 💁 🔂 🤠	a a a a a a a a a a a a a a a a a a a
All Empty 🔻 🔍 🖡	Group By: Date   Task   Priority	Person   Address   Referral Group	Order By: Start D
Surpreet Kumari 0	C Two Months Ago (1)	Person	Task
💕 Manager Tray	14-Sep-2020	test, man 3 mths [Ref: 700003]	Cont
Lisa Farrell 2	Last Month (1)	Person	Task
💕 Duty Tray 46	30-Oct-2020	test, man 3 mths [Ref: 700003]	Child
SMASH Manage 2			
🛃 Safeguardin 102			
💕 Safeguarding 65			
Remote Travs			

There are 3 lists on the tray configuration screen:

- 1. Favourite Trays Group Trays that you have been given access to view
- 2. **Tray Subscriptions** Colleagues trays that you have been given access to view
- 3. Tray Publications List of colleagues that have access to your work tray

#### Liquidlogic User Guide



Liquidlogic LCS	Train Home Tiles Help M	enu ▼ System ▼ Find ▼ Mrs Gu	irpreet Kumari 🔻 🔍
User Gurpreet Kumari Centre Professional Prac	tice Task Trays		
All Empty 🍸 🔍 🖡	Done		
💄 Gurpreet Kumari 0	🖈 Favourite Trays	< Tray Subscriptions	< Tray Publications
🔮 Manager Tray	Select All	Select All	Add new user(s)
< CLA 1 4			
Lisa Farrell 2	Duty Iray		
Nuty Tray 46	MASH Managers (LCS)		
AMASH Manage 2	Safeguarding Admin (CLA)		
Safeguardin 102	Safeguarding Admin (CP)		
Safeguarding 65			1

### Publishing your Work Tray to others

It is possible to give access to your Work Tray to any other users in LCS.

Select the spanner option from the top left-hand side of the Work Tray on the Home screen. From here you can go into **Tray Publications** and choose the users you want to give access to.

User Gurpreet Kumari Centre Professional Practice	Task Trays		
All Empty <b>Y</b> 4	Done		
💄 Gurpreet Kumari 🛛 0	\star Favourite Trays	< Tray Subscriptions	< Tray Publications
🐴 Manager Tray	Select All	Select All	Sustine Choo 🗙
< CLA 1 4			
Lisa Farrell 2	Duty Tray	CLA 1	Add new user(s)
	Manager Tray	Lisa Farrell	Clear All Publications
🔮 Duty Tray 46	MASH Managers (LCS)		
MASH Manage 2	🗹 Safeguarding Admin (CLA)		
Safeguardin 102	Safeguarding Admin (CP)		
- Cofoguarding CE			







## Subscribing to other peoples' Work Trays

Once another user has published their Work Tray to you, you will then need to subscribe to the Work Tray.

Select the spanner option from the left-hand side of the Work Tray on the Home screen. You should find your colleagues listed under **Tray Subscriptions**.



To gain access to a Work Tray listed under the Tray Subscriptions option, select the tick box(es) next to the user(s) whose tray(s) you wish to view. Click on the **Done** button once you've finished choosing your trays. The new work tray subscription will now appear in the left-hand side bar.

User Gurpreet Kumari Centre Professional Practice	Task Trays		Ň
All Empty 🝸 🤌 🖡	Group By: Date   Task   Priority   F	Person   Address   Referral Group	Order By: Start Date   D
Surpreet Kumari 0	Two Months Ago (1)	Person	Task Descri
Manager Tray	14-Sep-2020 CIN	test, man 3 mths [Ref: 700003]	Contact - Au
CLA 1 4	Last Month (1)	Person	Task Descri
< Lisa Farrell 2	30-Oct-2020 CIN	test, man 3 mths [Ref: 700003]	Child & You
🛃 Duty Tray 🛛 46			
🔮 MASH Manage 2			
Safeguardin 102			
Safeguarding 65			