



Timelines

Using a Timeline

Timelines are created for Children's Support Services (CSS), Special Educational Needs (SEN) and the Education, Health and Care Plan (EHCP).

The timeline is set up via **Tools | Administration | Timeline Design | Workflow** panel. Any number of different activities can be added to a timeline. Each activity consists of different properties. A caseworker or administrative officer follows a set of predefined activities on the timeline when dealing with a particular type of involvement.

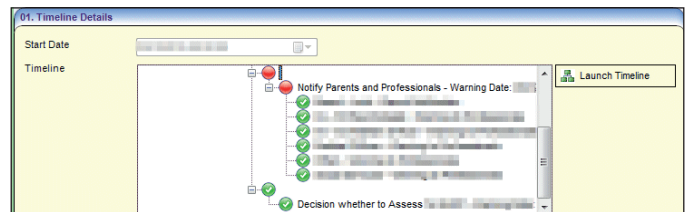
The following actions are available to enable the caseworker to manage the working timeline through to completion:

Add Activity Choose Branch Skip Re-Activate Replan Generate Correspondence Complete Activity

Launching the Timeline

To access the working timeline:

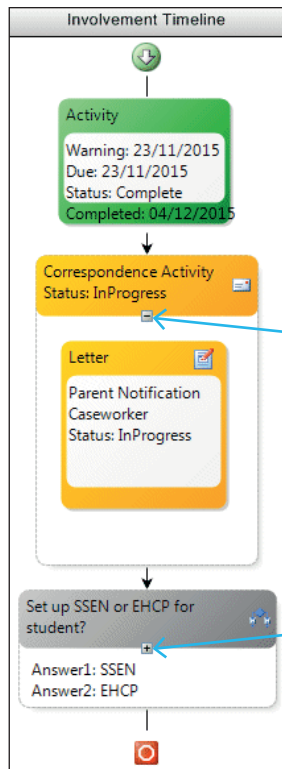
1. Select **Focus | People | Students | Involvements | Involvements Summary** to display the **Timeline Details** panel.
2. Click the **Launch Timeline** button to display the working timeline.



This is a general activity that has been completed.

This correspondence activity is in progress. Individual letter or email activities may be complete, but the correspondence activity is not complete until all letters or emails have been generated.

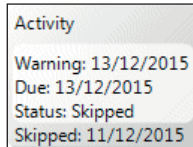
This branch activity has not started. An activity cannot start until the previous activity has changed from in progress to complete.



The status of a timeline is indicated by the following icons:

- Warning Date has been reached or exceeded.
- Target Date has been reached or exceeded.
- Timeline is in progress.
- Timeline is complete.

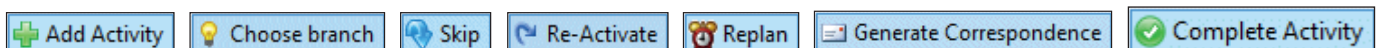
Click the minus sign to collapse the activity to view more of the overall timeline on screen.



A skipped activity is light grey.

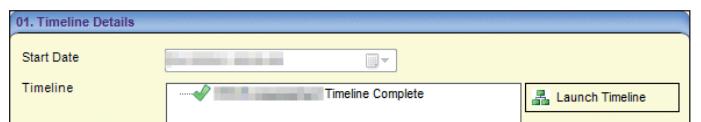
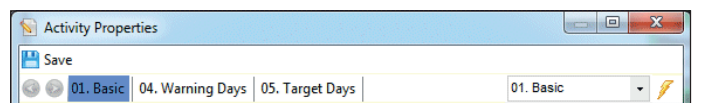
Click the plus sign to expand the activity to view all of the activities contained within.

3. Click one of the action buttons at the top of the **Involvement Timeline** page to display the **Activity Properties** dialog. For more information, see the *Using the Action Buttons* section.



Not all of the buttons are active at the same time.

4. Complete the **Activity Properties** dialog according to the action selected.
5. Click the **OK** button to save the changes to the timeline and return to the **Timeline Details** panel.
6. You must click the **Save** button on the **Involvement Timeline Details** page.
7. Repeat steps 2 - 6, as and when required, until the timeline is complete.



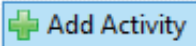


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Using the Action Buttons

The action buttons enable you to progress the working timeline through to completion. The relevant buttons are available depending on which activity is in progress and what the next action would be for that activity. After the action has been completed and the timeline has been saved by clicking the **OK** button, you must save the involvement timeline details.



Add Activity

Additional activities can be added to the timeline while it is in progress. New activities cannot be added before a completed activity.

1. Click the **Add Activity** button to display the **Involvement Timeline** area and the list of activities.
2. Select the required activity and drag the activity onto the **Involvement Timeline** area. **Add** icons are displayed to inform you where additional activities can be placed.
3. Double-click the **Container Header** and the **Activity Header** or select the warning icons, to display the **Activity Properties** dialog.
4. Enter the relevant details for the selected activity.
5. Click the **Save** button on the **Activity Properties** dialog.
6. Click the **OK** button on the **Involvement Timeline** page.
7. Click the **Save** button on the **Involvement Timeline Details** page.



Choose branch

This button is used to complete a branch or branch after delay activity; the process is the same for both activity types.

1. Select a branch or branch after delay activity that is in progress (orange).
2. Highlight the container header and click the **Choose Branch/Choose Branch after Delay** button to display the **Choose Branch Paths** dialog.
3. Choose a path from the **Select Path** dropdown list.
4. Select an **Activity Date**.
5. If required, select **Recalculate Subsequent Activities**.
6. Click the **Save** button. This completes the activity and the remaining paths are made inactive.
7. Click the **OK** button on the **Involvement Timeline** page.
8. Click the **Save** button on the **Involvement Timeline Details** page.



Skip

You can only skip an activity that is already in progress. Individual activities can be skipped one at a time or the activity as a whole can be skipped.

1. Select an activity that is in progress (orange).
2. Highlight the required container header or activity header and click the **Skip** button.
3. Select an **Activity Date**.
4. If required, select **Recalculate Subsequent Activities**.
5. Click the **Save** button.
6. Continue to highlight the activity headers until the required activities have been skipped. Alternatively, you can highlight the container header and skip all activities contained within.
7. Click the **OK** button on the **Involvement Timeline** page.
8. Click the **Save** button on the **Involvement Timeline Details** page.



Re-Activate

It is possible to undo the last completed or skipped activity on the timeline. You can only re-activate one activity at a time.

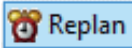
1. Highlight the latest completed (green) or skipped (light grey) activity.
2. Click the **Re-Activate** button; the status returns to in progress (orange).
3. Click the **OK** button on the **Involvement Timeline** page.
4. Click the **Save** button on the **Involvement Timeline Details** page.



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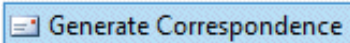
Using the Action Buttons cont'd



Replan

When any changes are made to a timeline, you are able to replan some of the activities. You can only replan an activity that has not yet started. Replanning an activity changes all subsequent warning dates and target dates.

1. Highlight an activity that has not yet started and double-click the activity header or the container header to display the **Activity Properties** dialog.
2. Change either the **Warning Days** field or the **Target Days** field; these are the only fields that can be altered.
3. Click the **Save** button.
4. Click the **Replan** button to update all subsequent dates.
Use the plus and minus icons to expand and collapse the activity to view the new dates.
5. Click the **OK** button on the **Involvement Timeline** page.
6. Click the **Save** button on the **Involvement Timeline Details** page.



Generate Correspondence

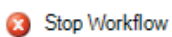
When correspondence is generated, a new outbound entry is created in the communication log. For more information see *RG_Communication_Log_Follow_Up*.

A workflow message is also received on the system administrator's **My Home Page | My Involvements**; the status of the timeline is displayed.

Before any correspondence can be generated, a role must be set up and a person must be linked to the role.

When a correspondence activity is designed, you can select to whether to send reminders and log responses.

1. Select an individual letter or email that is in progress (orange) and click the **Generate Correspondence** button to display the **Processing Timeline Activity** dialog.
Alternatively, select the header container of a correspondence activity that is in progress (orange) and click the **Generate All Correspondence** button to display the **Processing Timeline Activity** dialog.
2. The process dialog closes to display the **Report Viewer: <Report>**; this is the report or letter that was selected in the timeline design. Options are available to export the report, print the report and save the report.
If an email correspondence is generated, the email is displayed. If required, you can add additional recipients.
3. If required, click the **Send Reminder 1** button to generate a reminder to the recipient. The **Send Reminder 2** button is activated.
4. When a reply is received, click the **Log Response** button; this completes the activity (green).
5. If required, click the **Send Reminder 2** button to generate a second reminder to the recipient.
6. When a reply is received, click the **Log Response** button; this completes the activity (green).
When all of the letters and emails have been generated the activity is complete (green).
7. Click the **OK** button on the **Involvement Timeline** page.
8. Click the **Save** button on the **Involvement Timeline Details** page.



Stop Workflow

When designing a timeline, a **Stop Workflow** activity is available for **Branch and Branch after Delay** activities only. If this activity is inserted into the timeline, when the path is selected and the **Stop Workflow** activity is reached, the timeline completes, ignoring all subsequent activities.



More Information:

- *v4 Client help file.*



Related Reference Guides:

- *RG_Timelines_Creating a Timeline*
- *RG_Timelines_Timeline Details Summary*
- *RG_Communication_Log_Follow_Up.*