



# CSS v4 Online Workflow Management - Timelines

last updated for the Autumn 2016 (3.61) release

Handbook

**CAPITA**

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# Workflow Management - Timelines

## Introduction

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Timelines are a set of predefined activities that a caseworker or administrative officer of an involvement follows when dealing with a particular type of involvement. A template, defined in Workflow Management (Timelines) via **v4 Client | Tools | Administration | Timelines**, can be re-used multiple times by associating an instance of it with an involvement in v4 Online.

In v4 Online the timeline is managed on the **Involvement Summary** tab.

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-  Refer to the v4 Client help file for how to set up a timeline;  
The following Reference Guides are available to help you:  
RG\_Timelines\_Creating a Timeline  
RG\_OL\_CSS\_MWL\_Involvements\_Linking a Timeline.
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## What's New in this Release?

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### Timeline Data Transfer

This Timeline Data Transfer information has now been included in this handbook. It covers the following areas:

- Setting the status of the timeline data transfer facility.
- Creating the schedule task to transfer timelines reporting data.
- Running the timelines data transfer routine.
- Timeline reporting tables.

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**More Information:** Timeline Data Transfer on page 54.

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## Prerequisites

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The following settings (in v4 Client) are required before you can use a timeline in v4 Online:

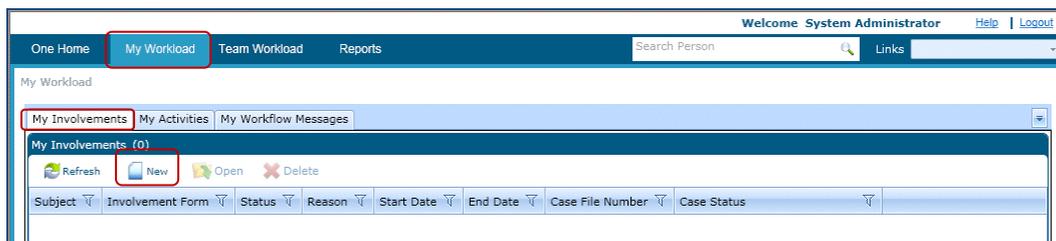
- **Tools | Team Structure | Posts**  
Assign user to post.
- **Tools | Team Structure | Establishment**  
Assign post to establishment.
- **Focus | Services | CSS Service Teams Administration**  
Set up a service team.  
Establishment must be entered.

- **Focus | Services | CSS Involvement Forms**  
Create a CSS generic involvement form.  
Link to a service team.  
Set up statuses and reasons.
- **Tools | Administration | Timeline | Timeline Design**  
Create a timeline.

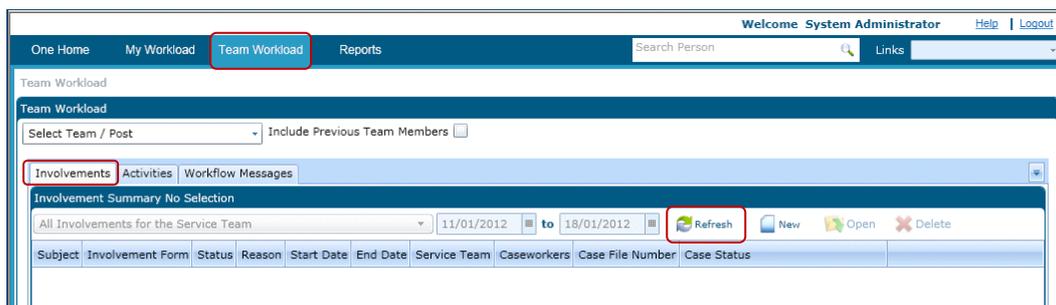
## Navigation to Workflow Timeline

Timelines are available in CSS v4 Online on both the **My Workload** and **Team Workload** pages.

- Select **My Workload** on the primary navigation bar.  
**My Involvements** is the default tab; this lists any existing involvements.



- Select **Team Workload** on the primary navigation bar.  
**Involvements** is the default tab; you must select a **Team / Post** from the drop-down, check the dates are correct and then click the **Refresh** button to display any existing involvements.



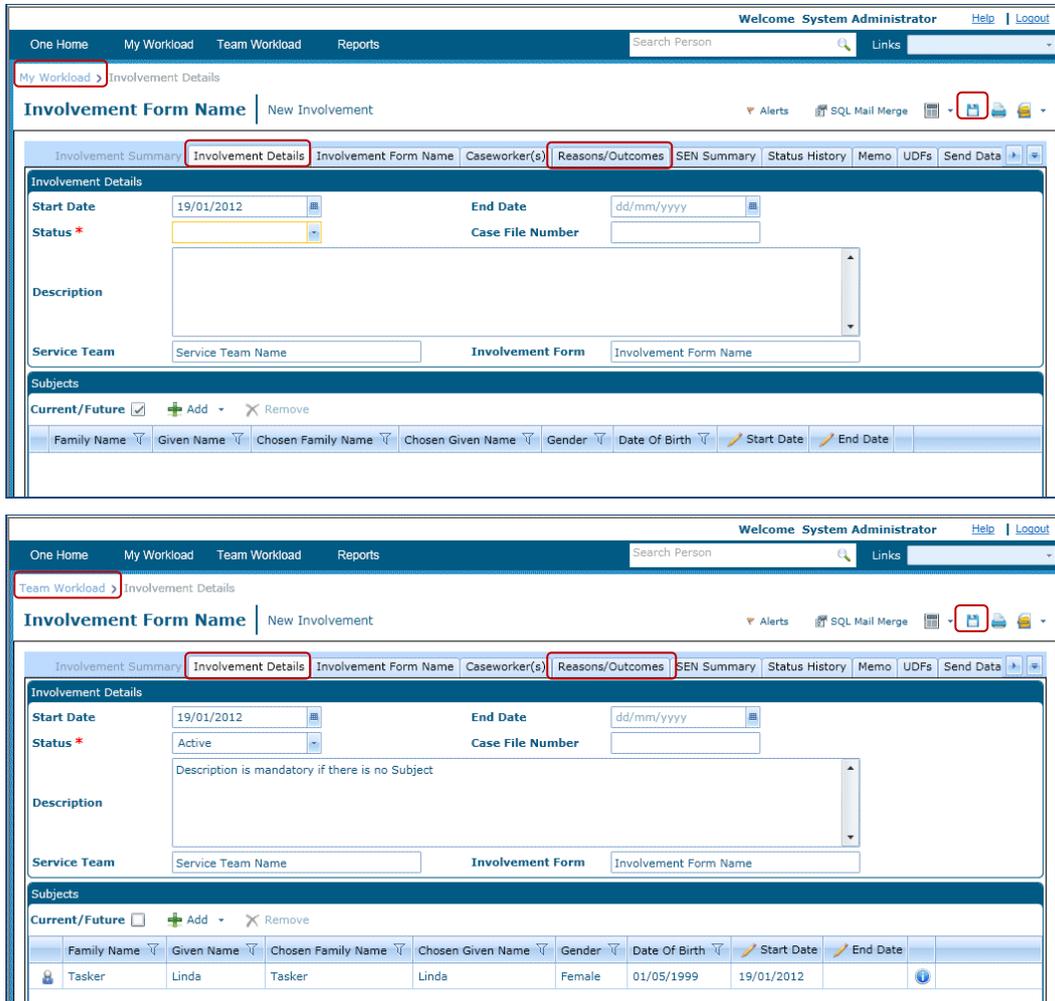
- Navigation to the **Involvement Details** page, where the workflow timeline can be configured and associated with an involvement, is possible via one of the following steps:
  - Double-click on an existing involvement.
  - Right-click on an involvement and select the **Open** option.
  - Highlight an involvement and click the **Open** button.
  - Click the **New** button under My Involvements/Involvements to open the **Choose an Involvement Form** browse; involvement forms are listed under each service.



- Highlight and select an involvement form to open the **Involvement Details** tab.

## Involvement Details

The involvement details must be saved before you can access the **Involvement Summary** tab. The **Start Date** defaults to today’s date, but can be changed, **Status** is a mandatory field, a **Description** is mandatory if there is no **Subject**, **Service Team** and **Involvement Form** are populated automatically. Before you can save, a reason must be added on the **Reasons/Outcomes** tab.



When the details have been entered click the **Save** button. If there are other active involvements for the subject, you are be advised and you need to confirm by clicking the **Continue Save** button. Once the record has been saved the **Involvement Summary** tab is available.

## Involvement Summary

The **Involvement Summary** is the first tab on the **Involvement Details** page. This tab is enabled only after an involvement is saved.

 The timeline can only be linked after the involvement details are saved.

The **Involvement Summary** tab contains the following panels:

- **Involvement Summary** – this panel displays all the details of the involvement saved in the **Involvement Details** tab. The details cannot be modified in this section; if you wish to make any modifications you must go to the relevant tab, make the changes and then save.
- **Timeline** – the timeline can be viewed from here and activities can be completed or skipped. When there is no workflow timeline template linked to the involvement, the following message is displayed:

No timeline linked to this involvement.

- **Link Timeline** – the **LINK TIMELINE** button is used to associate the timeline with the involvement.

## Associate a Timeline to an Involvement

A timeline can be linked to an involvement:

- Creating a new involvement.
- Selecting an existing involvement without a timeline.

The caseworker or the service team manager can select a timeline template that is associated with the involvement by using the **LINK TIMELINE** button, displayed on the right side of **Involvement Summary** tab.

When the timeline is associated with an involvement, it is assigned a start date that is the same as the involvement start date.

Once the timeline is associated, the actual dates for activity completion are calculated from the warning days and target days, assigned when the template was created, together with the involvement date.

The activities are presented for completion as workflow messages on the caseworker's or administrative officer's home page after the warning and or target dates are reached.

A timeline may contain many activities, branches, correspondence and groupings of activities (sequences, parallels, limits etc.).

Once the timeline has been associated with an involvement the **LINK TIMELINE** button is no longer visible.

You cannot delete an involvement once it has been associated with a timeline.



However, the timeline can be deleted from the involvement.

## Choosing a Timeline for an Involvement

To choose a timeline:

- Click on the **LINK TIMELINE** button to open the **Select Timeline** dialog.
- Select the timeline template (created in v4 Client) from the **Timeline** drop-down.
- The **Start Date** defaults to today's date, but can be changed using the calendar drop-down.

- If the **Day Type** for any activities in the selected timeline template is set to **Working Day** or **School Day**, the **Working Day Base** or **School Day Base** must be selected.
  - **Calendar Day:** If the **Day Type** is set as **Calendar Day**, both the **Working Day Base** and **School Day Base** search icons are disabled.
  - **Working Day Base:** The **Working Day Base** field populates the value selected while designing the timeline template in v4 Client. For more information on how to create a Working Day Base, refer to the v4 Client help file or *RG\_Timelines\_Creating a Timeline* available on the One Publications website ([www.onepublications.co.uk](http://www.onepublications.co.uk)).
  - **School Day Base:** If school days have been defined for one or more activities in the timeline template then in the simplest case, the main registered base of the child who is the subject of the involvement, should be selected here. Currently, this field is not auto populated as it is in CSS v4 Client.

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**Note:** Please take care when selecting a school days base, as an involvement may have multiple subjects or no subjects and also the involvement may have a base selected. The timeline uses the calendar from whichever base you select, to work out the school days on which each timeline activity falls. If you are linking a timeline that uses school days for any of its activities and you do not select a base here, the following warning message displays:

School Day Base is mandatory.

You will not be able to proceed until a base has been selected.

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If you wish to clear the selection against the **Working Day Base** or **School Day Base** fields, click the cross next to the browse on the respective field in the **Select Timeline** dialog.

- Once the timeline template is selected, the **Timeline** panel displays the following details:

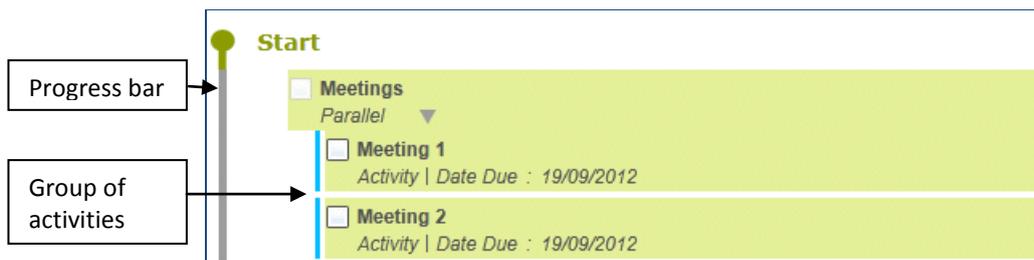


- The header displays:
  - Status** icon – this icon differs depending on the status of the timeline.
  - Name** – the name of the timeline template selected.
  - Start date** – the start date recorded in the **Select Timeline** dialog.
  - End date** – displays as **Incomplete** until all the activities in the workflow are completed. Once the timeline is complete, the text changes to **Completed on**, followed by the completion date.

Icon	Timeline Status
	Warning date has been reached or exceeded Target date has been reached
	Target date has been exceeded*
	Timeline is in progress or completed
	Stop workflow of in progress activity Only used for branch and branch after delay
	Stop workflow of completed activity Only used for branch and branch after delay
	<b>Start</b> – beginning of timeline (displays on the navigation tree) <b>Stop</b> – end of timeline (displays on the navigation tree)

\* The **Overdue** icon, used in CSS Online, displays when the target date is exceeded, i.e. the day after the target date, whereas the **Overdue** icon used in CSS Client, displays when the target date is reached or exceeded.

- The workflow displays:
  - A navigation tree of the selected timeline template’s workflow.
  - A vertical progress bar displaying the status of the timeline.
  - A vertical blue line indicating a group of activities within a task.

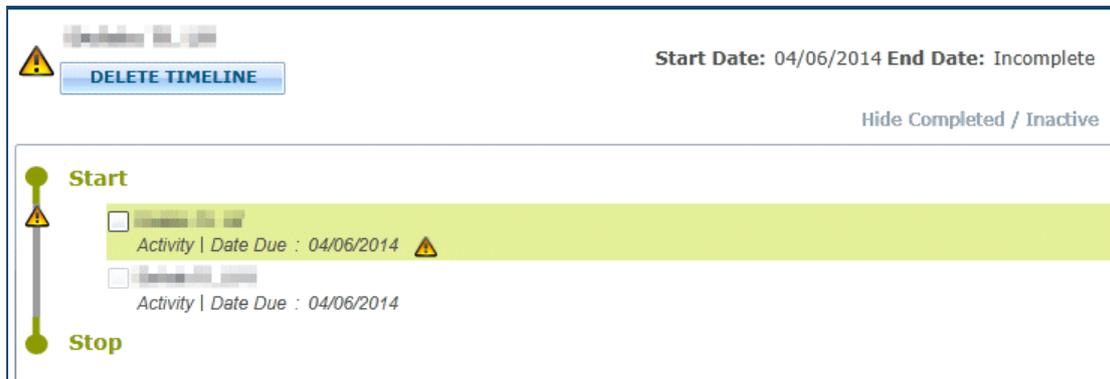


## Deleting a Timeline

A timeline can be deleted from an involvement, but once deleted it cannot be retrieved; it is completely removed from One. However, any correspondence or communication items that have been generated from the timeline will remain in One.

A timeline cannot be deleted if another user has it open.

The **DELETE TIMELINE** button is activated after saving the involvement.



If a timeline has been associated with an involvement, a System Administrator must assign permissions to delete the timeline.

To assign permissions to delete a timeline:

1. Select **v4 Client | Tools | Permissions | User Group Processes | CSS Administration Main Business Process**.
2. Assign **Read-Write-Delete** permissions to the user group.
3. Select **v4 Client | Focus | CSS Service Teams Administration | CSS Service Teams Enquiry** to display the **CSS Service Teams Definition** page.
4. The **Service Team Name** is populated.
5. Select the **Timelines can be Deleted** check box.
6. Click the **Save** button.

To delete a timeline:

1. Select **v4 Online | CSS | Involvements** to display the **Timeline Details** tab.
2. Select the **Involvement Summary** tab.
3. Click the **DELETE TIMELINE** button. The button is not activated until the involvement is saved.
4. The following message displays:
 

Are you sure this timeline should be deleted? Once a timeline is deleted it cannot be retrieved. It will be completely removed from the system. However, any Correspondence or Communication items which were generated from the timeline will remain in the system.
5. Click the **Yes** button to delete the timeline.

Once a timeline has been deleted, a new timeline can be added to the involvement, but it will start from the beginning so users will have to skip any irrelevant activities to get to the current point on the timeline.

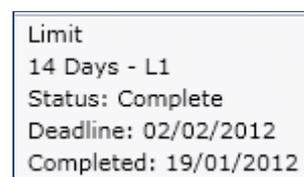
Deleting a timeline that is linked to an involvement does not affect the timeline template.

## Workflow Timeline Structure



Workflow timelines are structured as follows:

- By default, the status of the first activity in the workflow timeline structure is in progress. This is depicted by displaying the activity with a green background.
- A check box displays beside the activity title. This is enabled in in progress activities and when selected, a list of controls is displayed next to the respective activity title.
- The activities in the workflow timeline structure are displayed within the Start and Stop icons on the left vertical progress bar.
- The activity title is displayed on the first line and the activity type on the second line of the activity.
- The activity title is displayed in **bold** and the activity type is displayed in *Normal Italics*.
- The date due (target date) is displayed next to the activity type with the date calculated based on the workflow timeline start date or the completed date of the previous activity.
- For the limit grouping activity, the due date is displayed next to the activity type on the second line.
- The activities on each parallel task (hidden sequence) of grouping activities (parallel or limit activity) are indicated by a vertical blue line in front of the activity title.
- The **Expand** and **Collapse** buttons are displayed next to the activity type or due date for all grouping activities (limit, parallel, sequence, branch activities and correspondence). Right-click on the icon to choose the **Expand** or **Collapse** option.
- Hover over a particular activity to display the current status and other valuable information.



- Right-click on an activity to select one of the following options from the pop-up menu:
  - Properties – select this option to view the read-only properties of the activity.
  - Expand – open the activity on the navigation tree.
  - Collapse – close the activity on the navigation tree.
  - Skip – miss an activity and move the in progress activity on to the next activity.
  - Re-plan – to change warning and target dates of activities that are not yet started (in progress).
  - Re-activate – sets the status of a completed or skipped activity back to not yet started.
  - Add activity - activities may be added at the end of the timeline or may be inserted at any point using the **Add Activity** option.

Sub-menus under add activity are:

- Above – This displays for both the simple and grouping (sequence and limit) activities, to add an activity above the selected activity.
  - Below – This displays for only simple activities, to add an activity below the selected activity.
- Position of a newly added activity is as follows:
    - For simple activities – based on the above or below option selected.
    - For grouping activities (sequence and limit) - based on the above or below option selected.
    - For grouping activities (branch or branch after delay)- directly inserted as first activity.
    - For parallel activities – last parallel task with vertical blue bar prior to the newly added activity.

## Components of a Workflow Timeline

The workflow timeline is created via **v4 Client | Tools | Administration | Timeline | Timeline Design**, using a number of different activities.



### Activity

Activity is the basic building block of the workflow timeline that needs to be carried out as a single activity (or task). An activity can be added inside or outside of any container activities, i.e. sequence activity, limit, parallel activity or either of the two branches.



Two workflow messages are generated. The **Warning Days** message defined in the timeline template is displayed when the number of days specified as warning days are reached, counting from the calculated due date of the previous activity or from the start date of the timeline, if this is the first activity on the timeline.

The **Target Days** message is displayed when the number of days specified as target days are reached, counting from the calculated due date of the previous activity or from the start date of the timeline, if this is the first activity on the timeline.

## Activity Properties

Right-click an activity to view the **Activity Properties** dialog. The activity properties are read-only, unless you are adding a new activity at runtime.

The following fields are mandatory when adding an activity at runtime:

- **Title**
- **Warning Days** (can be set to '0')
- **Warning Day Type** (if number of days set), select from calendar, school or working day
- **Warning Message** and **Message Assignee** (if number of days set)
- **Target Days** (can be set to '0')
- **Target Day Type** (if number of days set), select from calendar, school or working day
- **Target Message** and **Message Assignee** (if number of days set)

 The **Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed via **v4 Client | Tools | Administration | Timeline | Timeline Design**.

### Title

The activity heading is displayed as the **Title** on the first line of the respective activity in the workflow timeline structure. Title is a mandatory field, up to 50 characters long.

### Description

This is an optional free text field, up to 100 characters, to record additional details about the activity.

### Linked Fields

This field is relevant only for SEN assessment involvements (currently only available in v4 client).

### Warning Days

Warning days are defined to enable the generation of workflow messages. If the message assignee is set to **Off**, then the following fields are not required. Selecting **Caseworker**, **Administrative Officer** or both makes all of the fields mandatory.

### Warning Days

- Number of days, changes to warning date once associated with a timeline.
- Setting warning days to 0 means that when the timeline is associated with an involvement, a workflow message displays on the **My Workload | My Workflow Messages** tab, the previous activity is completed immediately.
- Setting warning days to 1 means that a workflow message displays on the **My Workload | My Workflow Messages** tab, the day after (at midnight) the previous activity is completed.

### Day Type

- **Calendar, School, or Working Days**; must be the same as the target day type within the same activity.

### Message

- A free text field which displays on the **My Workload | My Workflow Messages** tab, once the specified date is reached.

### Message Assignee

- The person who receives the message. This can be assigned by selecting any one of these options:
  - Caseworker
  - Administrative Officer
  - Off

If the option **Off** is selected, no messages are sent.

Note: If **Caseworker** or **Both** has been selected, and there is more than one caseworker or admin officer assigned to the involvement, they will all receive the workflow messages. If the caseworker or admin officer is changed while the involvement is in progress, One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

### Target Days

**Target Days** are defined to enable the generation of workflow messages. The following fields are mandatory when selecting one of the options in the **Message Assignee** drop-down:

#### Target Days

- Number of days, which is the **Date Due** once associated with a timeline.
- Setting target days to 0 means that when the timeline is associated with an involvement, a workflow message displays on the **My Workload | My Workflow Message** tab, the previous activity is completed (or start date if first activity) immediately.
- Setting target days to 1 means that a workflow message displays on the **My Workload | My workflow Messages** tab, the day after (at midnight) the previous activity is completed (or start date if first activity).

#### Day Type

- **Calendar, School, or Working Days**; must be the same as **Warning Day Type** within the same activity.

#### Message

- A free text field that displays on the **My Workflow Messages** tab of the **My Workload** page, once the specified date is reached.

#### Message Assignee

- The person who receives the message (select from Caseworker or Administrative Officer – a message cannot go to both). If more than one caseworker or admin officer has been assigned to the involvement they will all receive the workflow messages. If the caseworker or admin officer is changed while the involvement is in progress, One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

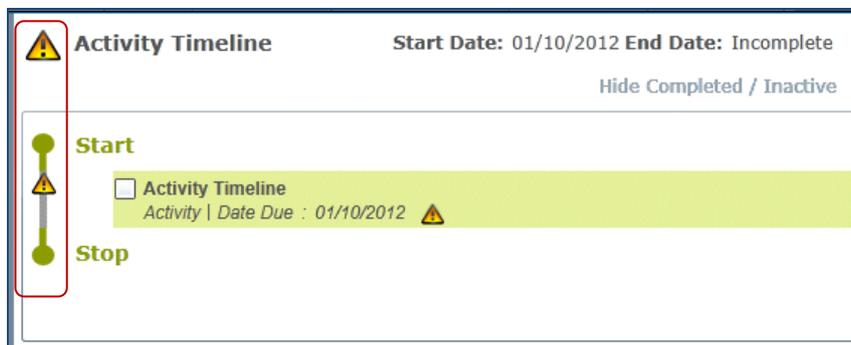
### Using an Activity

When a timeline is linked to an involvement, the activity that is in progress is displayed with a green background. The status and the navigation bar display according to whether the timeline is:

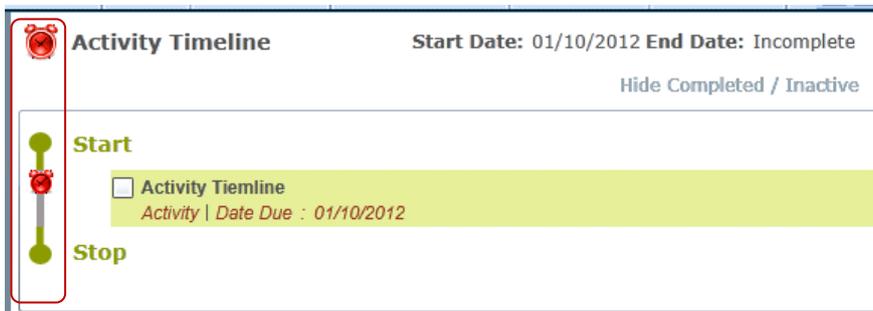
- in progress and the date due has yet to be reached.



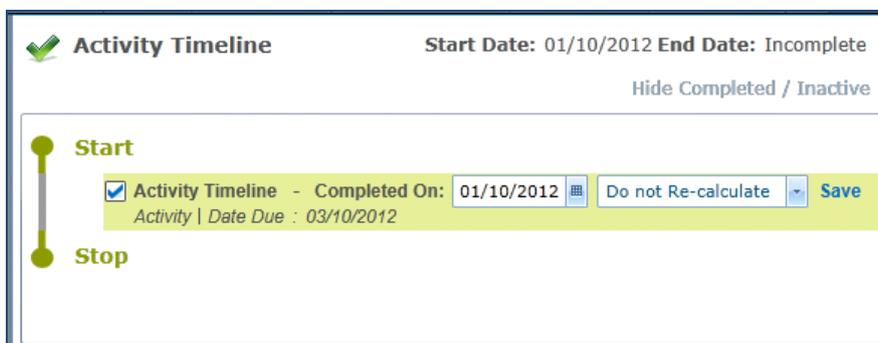
- in progress and the warning date has been reached/exceeded and the target date has been reached.



- in progress and the target date has been exceeded.



Select the check box to select the activity; a set of control fields display next to the activity title.




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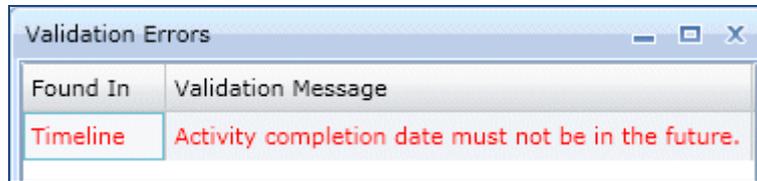
The current system date and **Do not Re-calculate** option are displayed as default for the selected in progress activity.

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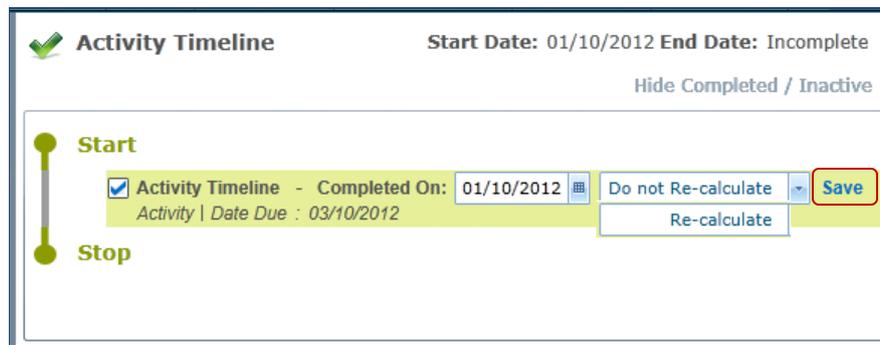
## Complete an Activity

To complete an activity it must be in progress and the check box must be ticked.

Select the check box adjacent to the activity; a set of controls are displayed next to the in progress activity title. The **Completed On** date defaults to the current system date. The activity completion date cannot be in the future date.



In order to re-calculate subsequent activities, select the **Re-calculate** option from the drop down. In order to leave the subsequent activities unaltered, select the **Do Not Re-calculate** option. Click the **Save** button.



**WARNING** You must save the timeline activity before you save the involvement.



If you save the involvement and then subsequently attempt to save the timeline activity, the following error message is displayed:

Record has been changed by another user. Cannot save.

To resolve this, exit the involvement completely, by clicking on **My Workload** or **Team Workload** page, then select the involvement again. The timeline activity is back to its incomplete state (check box unselected).

You can now select the check box and save the timeline activity.

 The same record locking error is also encountered in both online and client, if you have opened and are simultaneously working on the same timeline activity.

You can rectify this conflict between the same involvement in online and client, by closing both involvements and re-opening only one of them.

When the activity is completed, the activity title, status and date are displayed.



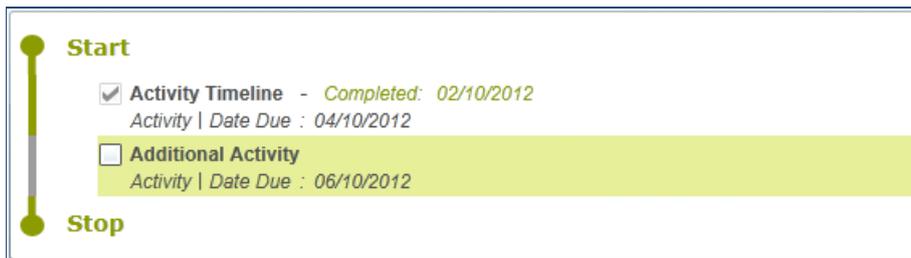
If the activity is completed on or before the date due, it displays in green text.

If the activity is completed after the date due, it displays in red text.



The check box is still selected, although it is disabled.

The in progress, green background moves to the next activity.



Hover over the completed activity to view the activity properties.

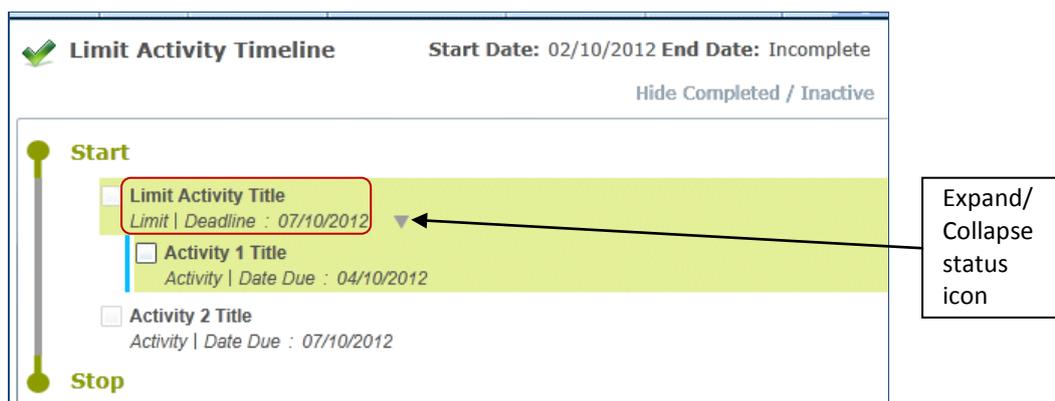
When you have finished working on an activity, click the **Save** button (at the top of the page) to save the involvement.

## Limit Activity

Limit activity is a container activity where all types of activities must be completed within the number of days defined in the limit deadline. At least one activity is required within a limit activity.

The title of the limit activity is displayed on the first line and the type of activity on the second line. The title and the activity type of those activities on each parallel task are displayed below the limit container.

Activities cannot be added inside the limit container, where the target days (inclusive of already existing activities in the limit) collectively exceed the number of days defined as the limit deadline.

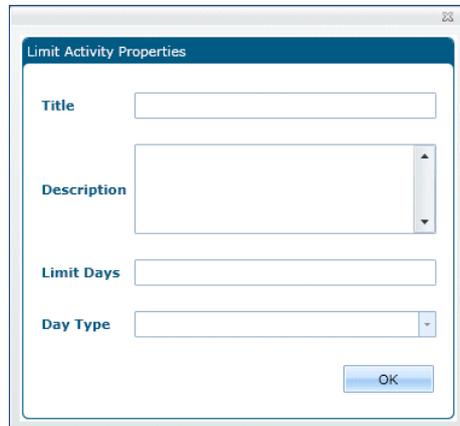


The **Expand/Collapse** status icon is displayed next to the deadline date of the limit container.

The activities on each parallel task (hidden sequence) of a limit container are indicated by a vertical blue line preceding the activity title check box of activity title.

### Limit Activity Properties

Right-click a limit activity to view the **Limit Activity Properties** window.



 The **Limit Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

#### Title

The activity heading is displayed as the Title on the first line on the respective activity in the workflow timeline structure. Title is a mandatory field, up to 50 characters.

#### Description

This is an optional free text field, up to 100 characters, to record additional details about the activity.

#### Limit Days

Displays the number of limit days until the activity must be completed. The number of days specified for activities included in the limit activity must not exceed this number.

#### Day Type

Select from Calendar, School or Working days.

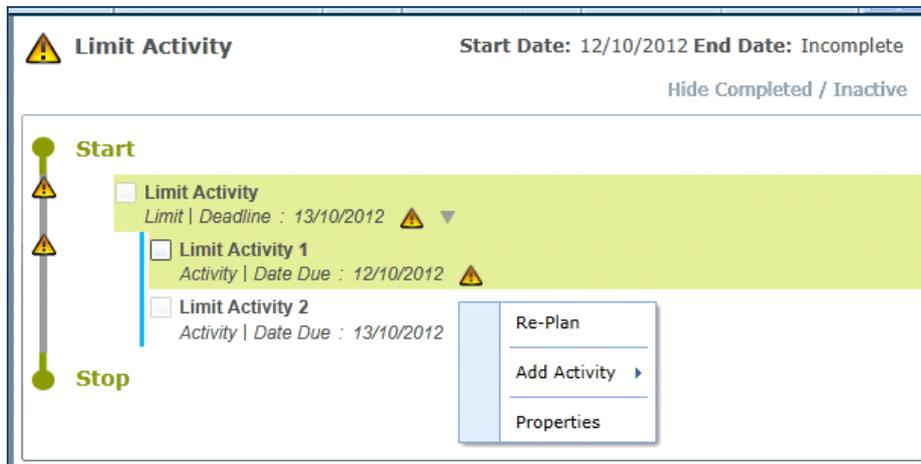
### Using a Limit Activity

As soon as the first activity within the limit is reached, it is set to in progress. The outer container for the limit is also shown as in progress.



When any of the activities within the limit container are completed or skipped, One calculates if the limit date will be exceeded.

If the limit is reached, you have the opportunity to re-plan the target days (using the right-click functionality) of any remaining activities contained within the limit activity, provided these activities are not in progress, completed or skipped. However, the limit date itself cannot be changed at run time; this can only be done in the timeline design.



### Complete a Limit Activity

The limit activity remains in progress until all activities that are placed inside it, are either completed or skipped. When the limit activity is completed, the activity title, status and date are displayed.



## Sequence Activity

A sequence activity is a container activity that contains a number of individual activities that need to be carried out one after the other, in sequence.

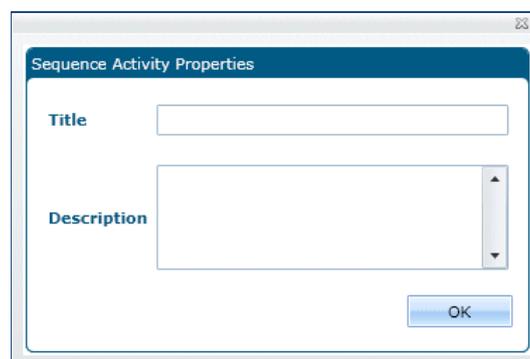


Two workflow messages are generated for each activity that is placed inside the sequence.

The first activity inside the sequence is initially in progress. All activities inside the sequence must be completed in order. The titles of activities inside the sequence container are displayed on the **Summary** panel area of the involvement.

## Sequence Activity Properties

Right-click the activity header to view the **Sequence Activity Properties** window.




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 The **Sequence Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

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### Title

The activity heading is displayed as the **Title** on the first line on the respective activity in the workflow timeline structure. **Title** is a mandatory field, and accepts up to 50 characters.

### Description

**Description** is an optional free text field, up to 100 characters, to record additional details about the activity.

## Using a Sequence Activity

The first activity inside the sequence is initially in progress. All activities inside the sequence must be completed in order. The check box is only made available for the next activity in the sequence.

An activity within the sequence activity can be skipped.

As the activities on a sequence activity are completed or skipped, the activity title, status and date are displayed.

The titles of those activities inside the sequence container are displayed on the **Summary** panel of the involvement.



### Complete a Sequence Activity

Once all of the activities on the sequence activity are completed, the activity title, status and date are displayed.



The activity **Completed On** date must be after the workflow **Start Date**.  
 An activity completion date cannot be in the future.

## Parallel Activity

A parallel activity is a container activity that is logically grouped with a number of activities that can be completed in any order, rather than in sequence.

The title of the parallel activity is displayed on the first line and the activity type (parallel) on the second line. The title and the activity type of the activities on each parallel task are displayed below the parallel container.

All of the activities are showing as in progress.



The check box is available for all activities within the in progress parallel activity; both boxes can be checked at the same time, but the activities can only be saved individually.

## Parallel Activity Properties

Right-click the activity header to view the **Parallel Activity Properties** window.




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 The **Parallel Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

---

### Title

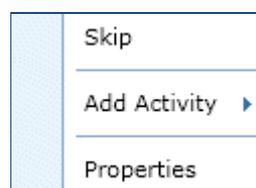
The activity heading displays as the **Title** on the first line on the respective activity in the workflow timeline structure. **Title** is a mandatory field, up to 50 characters.

### Description

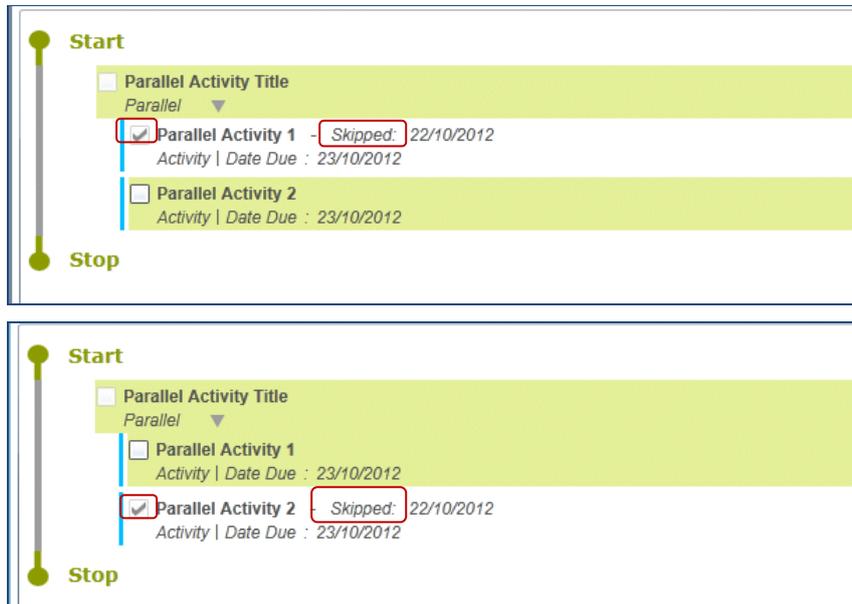
This is an optional free text field, up to 100 characters, to record additional details about the activity.

## Using a Parallel Activity

Any of the activities inside the parallel activity can be skipped by right-clicking on any of the in progress activities and selecting the **Skip** option.

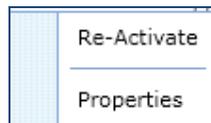


Once the parallel activity is skipped, the activity title, status and date are displayed. The in progress, green background, moves to the remaining parallel activity (The main parallel activity still shows as in progress). The check box is disabled with a tick in it.

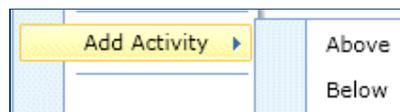


 Hover over the skipped activity to view the new status.

To re-activate a skipped parallel activity, right-click on the activity and select the **Re-Activate** option.



To add an extra activity inside the parallel activity, right-click on the background of the parallel container and select the **Below** option on **Add Activity** in the context menu.



This adds another single activity as the last parallel task with a vertical blue on the check box, in front of the newly added activity. The size of the parallel container expands when new activities are added. The **Expand** or **Collapse** status icon is displayed next to the activity type.



As soon as the first activity on each parallel task of the parallel activity is reached, the background colour of parallel activity and its first activities are highlighted in green to indicate the status as in progress.

 The activities on each parallel task (hidden sequence) of parallel container are indicated by a vertical blue line next to the check box of activity title.

If the first activity in the parallel activity is skipped the green in progress background moves to the added activity and a check box becomes available for that activity and the remaining activities.

### Complete a Parallel Activity

Activities inside the parallel activity can be marked as completed or skipped in any order within the parallel activity, but in sequence on each parallel activity.

The timeline moves on to the activity placed after the parallel activity, only when all the activities inside the parallel activity are completed or skipped. Once all of the activities on the parallel activity are completed or skipped, the activity title, status and date are displayed.

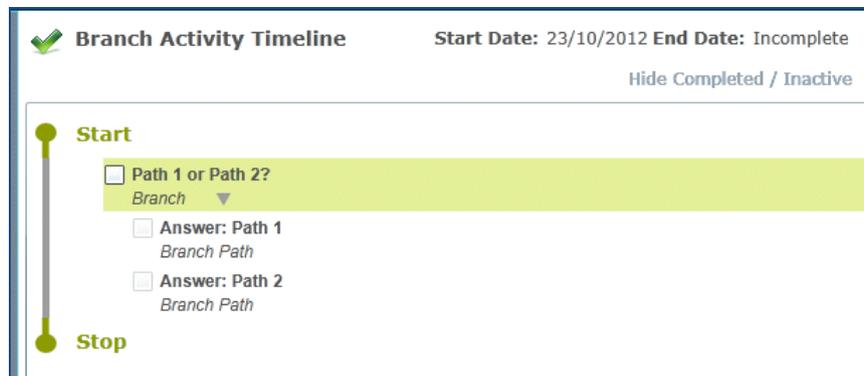


You can complete additional activities after the final activity in the parallel activity.



## Branch Activity

A branch activity does not have any **Warning** or **Target Day** messages defined. This means that as soon as the previous activity on the timeline is complete, the branch activity is due (in progress). You must now choose which path (branch) to take.



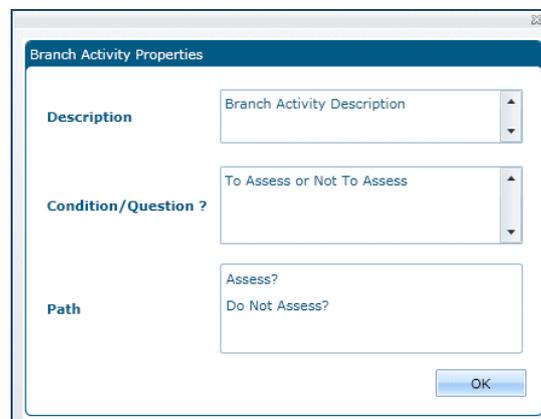
The title of the activity is generally a question e.g. *To Assess or Not To Assess?* The branch paths (answers) are then listed below with the target (due) date from the activity within the branch.

Additional activities can be placed within any of the branches. Once a branch has been chosen, the timeline then proceeds to the subsequent activities for that particular path. Once a path has been chosen, all other paths are unavailable.

A timeline can be stopped within a branch by using the **Stop Workflow** activity.

## Branch Activity Properties

Right-click on the activity header to view the **Branch Activity Properties** window.




---

 The **Branch Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

---

### Description

**Description** is an optional free text field, up to 100 characters, to record additional details about the activity.

### Condition/Question?

This is a mandatory, free text field to display the **Condition** or **Question**, it requires a number of possible outcomes (paths).

### Path

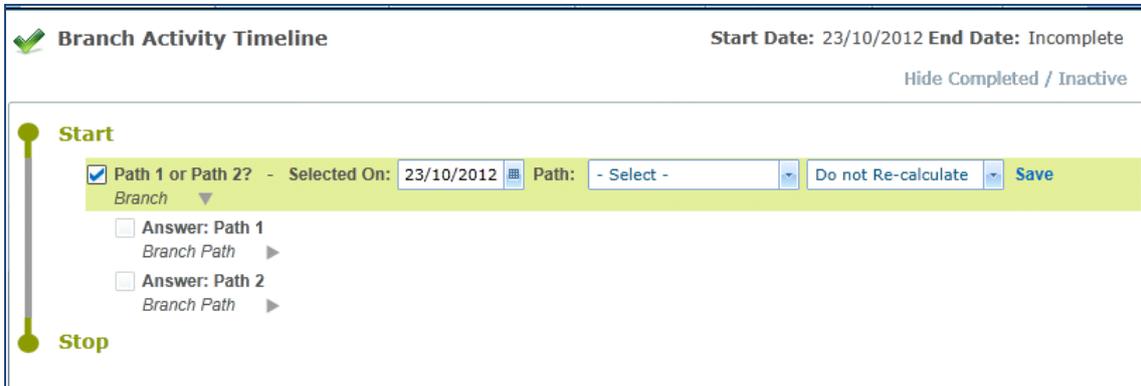
Each branch or branch after delay path (outcome) represents a different branch or branch after delay that the timeline may follow.

### Using a Branch Activity

Workflow messages are not generated for the branch activity; it is in progress or due, as soon as the previous activity on the timeline is marked as completed or skipped.

The background colour of the branch container is highlighted in green, with the check box enabled next to the branch activity title, when the status is in progress.

Select the check box to select the activity; a set of control fields display next to the activity title.

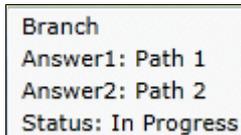


The **Selected On** date defaults to the current system date. Select a **Path**.

In order to re-calculate subsequent activities, select the **Re-calculate** option from the drop-down.

In order to leave the subsequent activities unaltered, select the **Do Not Re-calculate** option. Click the **Save** button.

Hover over the branch activity to view the title of the branch, together with the titles of all of its paths.



Once a path has been selected, all other possible paths are unavailable. The timeline automatically continues with the activities inside the chosen path.



Once the branch path is selected, the date and chosen path are displayed. The in progress status, (green background) moves to the first activity of the chosen path.

The activities can then be skipped or completed as required, additional activities can be added or activities can re-planned. An activity that has been skipped or completed can be re-activated

## Complete the Branch Activity

To complete the branch activity, it must be in progress s, with the check box enabled.

When all of the activities on the selected branch path are completed or skipped, the activity title, status, date and path are displayed.

**Branch Activity Timeline** Start Date: 23/10/2012 COMPLETED ON: 23/10/2012  
[Hide Completed / Inactive](#)

**Start**

- Path 1 or Path 2?** - Completed: 23/10/2012 Path: Path 1  
 Branch ▼
- Answer: Path 1** - Completed: 23/10/2012  
 Branch Path ▼
- Activity 1** - Completed: 23/10/2012  
 Activity | Date Due : 24/10/2012
- Activity 2** - Completed: 23/10/2012  
 Activity | Date Due : 25/10/2012
- Answer: Path 2**  
 Branch Path ▼
- Activity 1**  
 Activity | Date Due : 24/10/2012

**Stop**

The **Stop Workflow** activity can be used to end a branch timeline. This must be inserted when the timeline is designed. Please see *Stop Workflow Activity* on page 50.

**Branch Activity Timeline** Start Date: 23/10/2012 End Date: Incomplete  
[Hide Completed / Inactive](#)

**Start**

- Path 1 or Path 2?** - Selected On: 23/10/2012 Path: Path 2  
 Branch ▼
- Answer: Path 1**  
 Branch Path ▼
- Activity 1**  
 Activity | Date Due : 24/10/2012
- Activity 2**  
 Activity | Date Due : 25/10/2012
- Answer: Path 2**  
 Branch Path ▼
- Activity 1** - Completed: 23/10/2012  
 Activity | Date Due : 24/10/2012
- Stop Workflow**

**Stop**

---

The **Stop Workflow** option is only used for branch and branch after delay activities.

## Branch After Delay Activity

A branch after delay activity has both **Warning Days** and **Target Days** defined. The branch after delay activity will have a delay after the previous activity has been completed or skipped, before the **Message Assignee** receives the workflow messages relating to the respective branch after delay activity. (The delay equals the number of days defined as **Warning** or **Target Days** for the respective branch after delay).

 In all other respects, branch and branch after delay activities behave in the same manner.



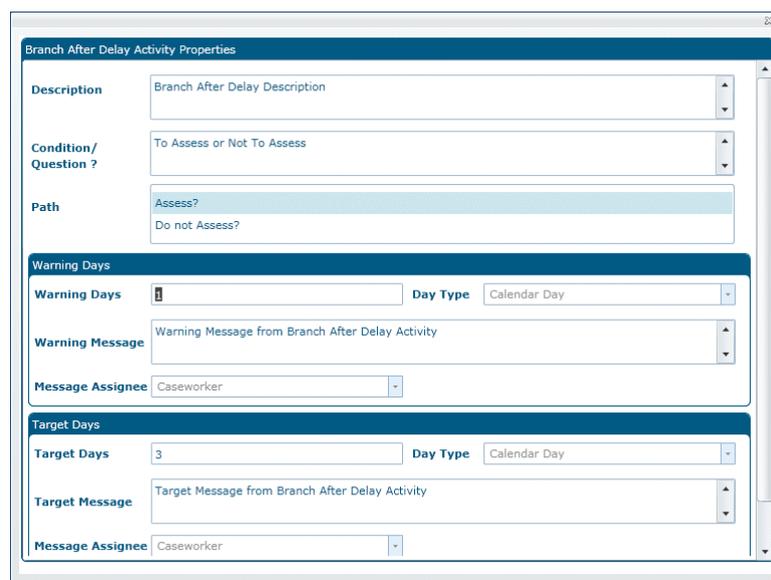
The title of the activity is generally a question e.g. *To Assess or Not To Assess?* The branch after delay paths (answers) are then listed below with the **Target (Due) Date** from the activity within the branch.

Additional activities can be placed within any of the branches. Once a branch has been chosen, the timeline then proceeds to the subsequent activities for that particular path. Once a path has been chosen, all other paths are unavailable.

A timeline can be stopped within a branch by using the **Stop Workflow** activity. Please see *Stop Workflow Activity* on page 50.

## Branch After Delay Activity Properties

Right-click on the activity header to view the **Branch After Delay Activity Properties** window.



 The **Branch After Delay Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

## Description

**Description** is an optional free text field, up to 100 characters, to record additional details about the activity.

## Condition/Question?

This is a mandatory, free text field to display the **Condition** or **Question**; it requires a number of possible outcomes (paths).

## Path

Each branch after delay path represents a different route through the timeline, or a choice that needs to be made at the point in the timeline where the branch is placed. There may be several possible paths defined but you can only choose one path for a branch.

## Warning Days

Warning days are defined to enable the generation of workflow messages. If the **Message Assignee** is set to **Off**, then the following fields are not required. Selecting **Caseworker**, **Administrative** officer or **Both** makes all of the fields mandatory:

### Warning days:

- Number of days, changes to a warning date once associated with a timeline.
- Setting warning days to 0 means that when the timeline is associated with an involvement, a workflow message is displayed on the **My Workflow Messages** tab on the **My Workload** page, once the previous activity is completed.
- Setting warning days to 1 means that a workflow message is displayed in the **My Workflow messages** tab on the **My Workload** page, the day after (at midnight) the previous activity is completed.

### Day Type:

- **Calendar**, **School**, or **Working** days; must be the same as **Target Day** type within the same activity.

### Message:

- A free text field displays on **My Workflow Messages** tab on the **My Workload** page, once the specified date is reached.

### Message Assignee:

- The person who receives the message. This can be assigned by selecting any one of the following options:
  - Caseworker
  - Administrative Officer
  - Both (only available for Correspondence activity)
  - Off

If the **Off** option is selected, the message will not be sent.

If more than one Caseworker or Administrative Officer has been assigned to the involvement they will all receive the workflow messages. If the Caseworker or Administrative Officer is changed while the involvement is in progress, One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

## Target Days

Target days are defined to enable the generation of workflow messages. The following fields are only mandatory when selecting the options in the **Message Assignee** dropdown:

### Warning Days:

- Number of days, which is the **Date Due** once associated with a timeline.
- Setting target days to 0 means that when the timeline is associated with an involvement a workflow message is displayed on the **My Workflow Messages** tab on the **My Workload** page, immediately the previous activity is completed (or the start date is reached, if this is the first activity).

- Setting target days to 1 means that a workflow message is displayed on the **My Workflow Messages** tab on the **My Workload** page, the day after (at midnight) the previous activity is completed (or the start date if this is the first activity).

**Day Type:**

- **Calendar, School, or Working** days; must be the same as the **Warning Day** type within the same activity.

**Message:**

- This is a free text field that displays on the **My Workflow Messages** tab on the **My Workload** page, once the specified date is reached.

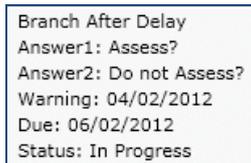
**Message Assignee:**

- The person who receives the message (select from **Caseworker** or **Administrative Officer** – the message cannot go to both). If more than one caseworker or admin officer has been assigned to the involvement they will all receive the workflow messages. If the caseworker or admin officer is changed whilst the involvement is in progress, then One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

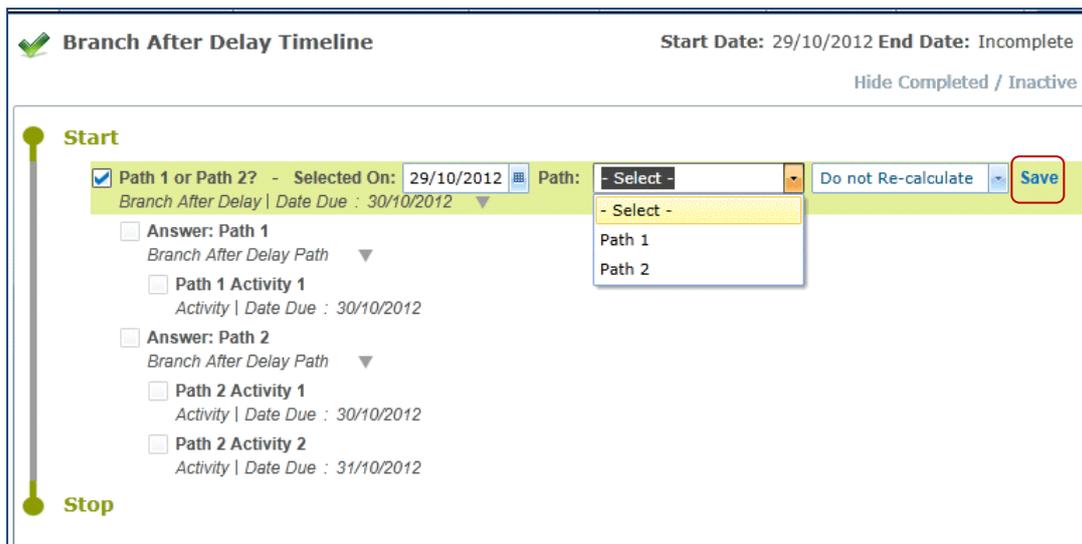
**Using a Branch After Delay Activity**

Two workflow messages are generated for the branch after delay activity, when its warning and target dates are reached.

When the branch after delay container is in progress, the background is highlighted in green with the check box enabled next to the title. The title of the branch after delay and the titles of all of its paths are displayed as a tooltip, when you hover over the branch after delay activity.



Select the check box to select the activity; a set of control fields display next to the activity title.



Select the chosen **Path** and click the **Save** button.

When the activity has been saved, the activity title, status, date and path are displayed.

Once the path has been chosen, all other possible paths are unavailable. The timeline automatically continues with the activities inside the chosen path.

The activities can then be skipped or completed as required, additional activities can be added or activities can be re-planned.

### Complete the Branch After Delay Activity

To complete the branch after delay activity, it must be in in progress (green background) and the check box next to the in progress activity must be enabled.

Once all the activities on the selected branch after delay path are completed or skipped, the activity title, status and date are displayed.

The **Stop Workflow** activity can be used to end a branch after delay timeline. This must be inserted when the timeline is designed. Please see *Stop Workflow Activity* on page 50.

 The **Stop Workflow** option is only used for branch and branch after delay activities.

## Correspondence Activity

A correspondence activity is a container activity that is logically grouped with a number of letter activities. The activities can be completed in any order, rather than in a sequence. Hover over an individual activity to view its properties and status.



 A correspondence activity can only be designed using letters; emails cannot be generated in v4 Online.

A correspondence activity has both **Warning Days** and **Target Days** as defined in the creation of the timeline.

The title of the correspondence activity is displayed on the first line. The type of activity is displayed on the second line followed by the **Date Due**.

## Correspondence Activity Properties

Right click on the correspondence activity to display the **Correspondence Activity Properties** window.

 The **Correspondence Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

### Title

The activity heading displays as the **Title** on the first line of each activity in the workflow timeline structure. **Title** is a mandatory field, up to 50 characters.

### Description

This is an optional free text field, up to 100 characters, to record additional details about the activity.

## Warning Days

**Warning Days** are defined to enable the generation of workflow messages. If the **Message Assignee** field is set to **Off**, then the following fields are not required. Selecting **Caseworker**, **Administrative Officer** or **Both** makes all of the fields mandatory.

### Warning Days

- Number of days, changes to warning date once associated with a timeline.
- Setting warning days to 0 means that when the timeline is associated with an involvement, a workflow message displays on the **My Workload | My Workflow Messages** tab, the previous activity is completed immediately.
- Setting warning days to 1 means that a workflow message displays on the **My Workload | My Workflow Messages** tab, the day after (at midnight) the previous activity is completed.

### Day Type

- **Calendar**, **School**, or **Working Days**; must be the same as the **Day Type** defined in the **Target Days** section.

### Message

- A free text field that displays on the **My Workload | My Workflow Messages** tab, once the specified date is reached.

### Message Assignee

- The person who receives the message. This can be assigned by selecting any one of the following options:
  - Caseworker
  - Administrative Officer
  - Both (only available for correspondence activity)
  - OffIf **Off** is selected, no messages are sent.

Note: If **Caseworker** or **Both** has been selected, and there is more than one Caseworker or Administrative Officer assigned to the involvement, they will all receive the workflow messages. If the Caseworker or Administrative Officer is changed while the involvement is in progress, One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

## Target Days

**Target Days** are defined to enable the generation of workflow messages. The following fields are mandatory when selecting one of the options in the **Message Assignee** drop-down:

### Target Days

- Number of days, which is the **Date Due** once associated with a timeline.
- Setting target days to 0 means that when the timeline is associated with an involvement, a workflow message displays on the **My Workload | My Workflow Message** tab, the previous activity is completed (or start date if first activity) immediately.
- Setting target days to 1 means that a workflow message displays on the **My Workload | My workflow Messages** tab, the day after (at midnight) the previous activity is completed (or start date if first activity).

### Day Type

- **Calendar**, **School**, or **Working Days**; must be the same as the **Day Type** defined in the **Warning Days** section.

## Message

- A free text field that displays on the **My Workflow Messages** tab of the **My Workload** page, once the specified date is reached.

## Message Assignee

- The person who receives the message (select from Caseworker or Administrative Officer – a message cannot go to both). If more than one Caseworker or Administrative Officer has been assigned to the involvement they will all receive the workflow messages. If the Caseworker or Administrative officer is changed while the involvement is in progress, One ceases to send messages to the previous people and generates messages for the people currently assigned to the involvement.

## Letter Activity Properties

Details of the letter activity include a check box for **Response Required**. If **Response Required** is selected then when the letter is generated it automatically displays a **Log Response** field, meaning that an incoming letter or communication must be received from the person to whom the letter was sent, before this activity can be completed.

 The **Letter Activity Properties** window displays read-only information (unless you are adding a new activity at runtime). These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

### Recipient Details

#### Recipient Role:

This field displays the **Recipient Role** that was selected when the timeline is designed in v4 Client, for the letter. A role is defined on the timeline template and is populated with the details of the actual person occupying that role for the involvement, when the letter is generated. For example, if a Head teacher role is chosen as a recipient for a letter activity, then whichever person occupies the Head teacher position for the base specified on the involvement, is the person whose details are used for the generated letter.

#### Response Required:

This check box is selected if a response is required from the recipient.

### Template Details

Displays the **Report Template** selected when the timeline is designed in v4 Client for the letter activity. This must be a **Linked Document** and not a **Quick Report**.

### Linked Field

This is only relevant for SEN Assessment involvements. It is currently unavailable in v4 Online.

### First Reminder

The effect of this at runtime is that One starts counting from the day the previous letter was produced and when it reaches the specified number of elapsed days, workflow messages are generated to the same message assignees as selected for the target message.

**Days Until Sent:** The number of days after which the first reminder letter should be sent.

**Report Template:** Displays the report template selected when the timeline is designed in v4 Client for the letter activity.

### Second Reminder

The effect of this at runtime is that One starts counting from the day the previous letter was produced and when it reaches the specified number of elapsed days, workflow messages are generated to the same message assignees as selected for the target message

**Days Until Sent:** Number of days after which the Second Reminder letter should be sent.

**Report Template:** Displays the report template selected when the timeline is designed in v4 Client for the letter activity.

### Using a Correspondence Activity

The **Expand** and **Collapse** status indicators are displayed next to the **Date Due** of the correspondence container.



Two workflow messages are generated for the correspondence activity when its warning and target dates are reached.

A letter activity can be skipped (using the right-click functionality), but not the correspondence activity itself.



To skip a correspondence activity, you must skip the letter activities individually. When the letter activities are skipped, the correspondence activity is complete and the activity title, status and date are displayed.



## Generate (All) Correspondence

To generate a letter activity, right-click on an in progress letter activity, select the **Generate Correspondence** option. This creates a new outbound entry (record) in the **Communication Log** area.

To generate all the letters in a correspondence activity, right-click on the correspondence container, select the **Generate All Correspondence** option.

When the **Generate Correspondence** or the **Generate All Correspondence** options are selected and the selected **Recipient Role** field at the time of template creation is empty, the letter cannot be generated. For example, if the recipient is the Caseworker and there is no Caseworker recorded on the involvement, the following message is displayed:

There are no people for the selected role: <Caseworker>  
Do you wish to add people manually to the communication item? (Yes No)

If you select **No**, the correspondence letter will not be generated and the following message is displayed:

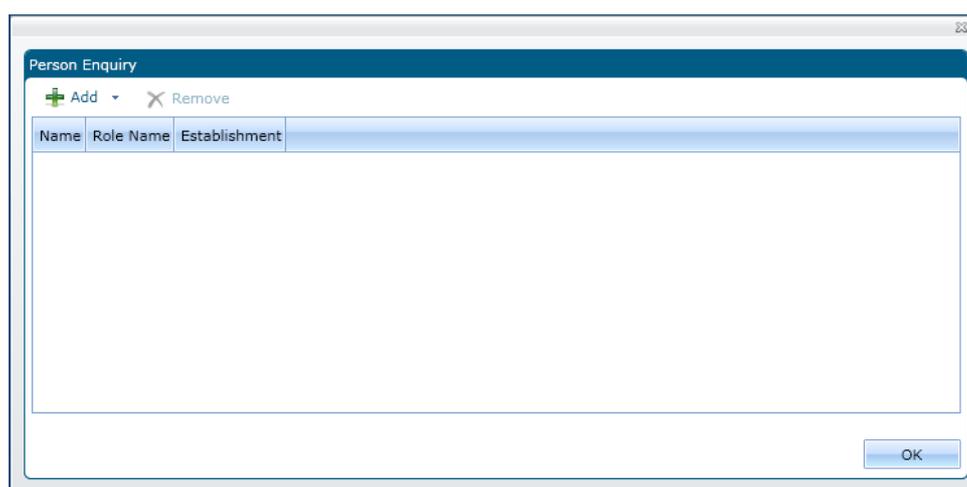
There are no people for the selected role: <Caseworker>  
No Correspondence items have been generated. ( OK)

If there are no subjects listed on the involvement details the following message is displayed:

There are no subjects defined for this involvement. No correspondence can be generated.  
Please either skip this activity or add a subject to the involvement. (OK)

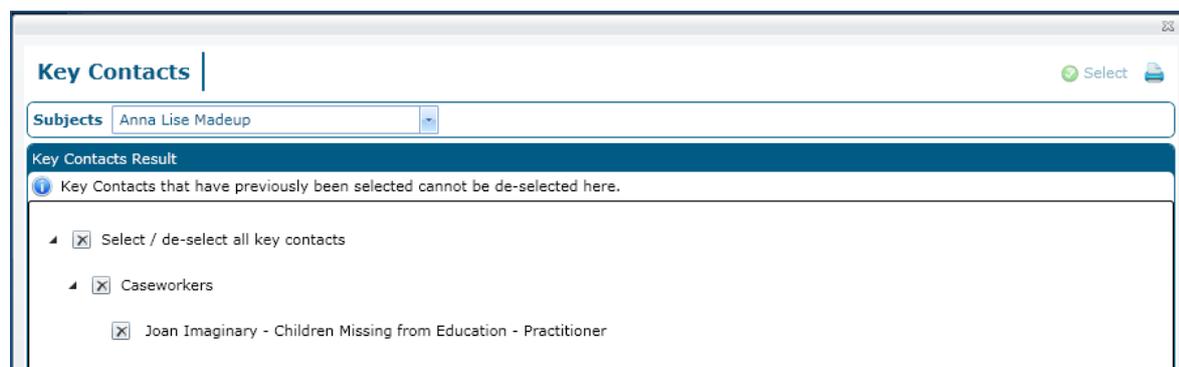
Select **Yes** to manually add the <caseworker> to the involvement.

The **Person Enquiry** screen is displayed:



Click the **Add** button to display the following two options:

- **Person Search** – select this option to search all people recorded in One.
- **Key Contacts** – select this option to search key contacts defined for the subject.



Choose a recipient from those listed in the **Person Search** browse or from the **Key Contacts Result** list.

 If you are in doubt who to choose, check the properties specified for the letter (right-click on a letter and select the **Properties** option). Bear in mind that some letter recipients need to meet other criteria. For example, if a letter recipient is intended to be a parent, then the person you select must have parental responsibility for the subject.

If you choose the **Parent – Joint** option, this produces two letters, even if the parents live at the same address and is used for items of correspondence such as Penalty Notices. The **Parent – Individual** option produces one letter for both parents living at the same address or two letters for parents living separately.

Generating a letter creates a new **Outbound** entry in the **Communication Log** area and uploads the generated letter as a **Linked File** to One. Letters are generated in **Crystal Report Viewer**, with options to **Export** and **Print** the letter or report.



### Communication Log

To access the **Communication Log** area, click on the **Links** drop-down on the involvement form.



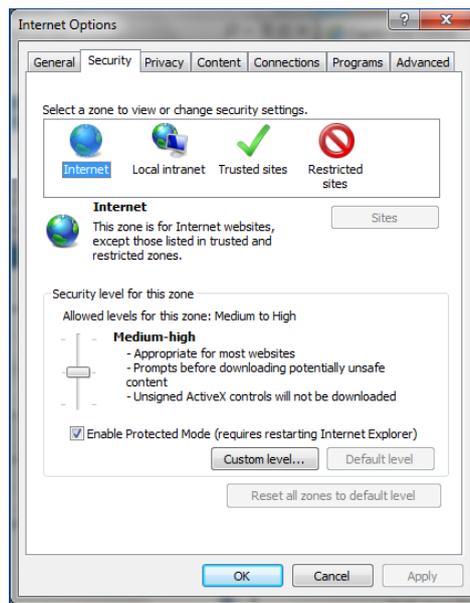
This opens the **Communication for Involvement** screen, with the **List of Communications** panel below.



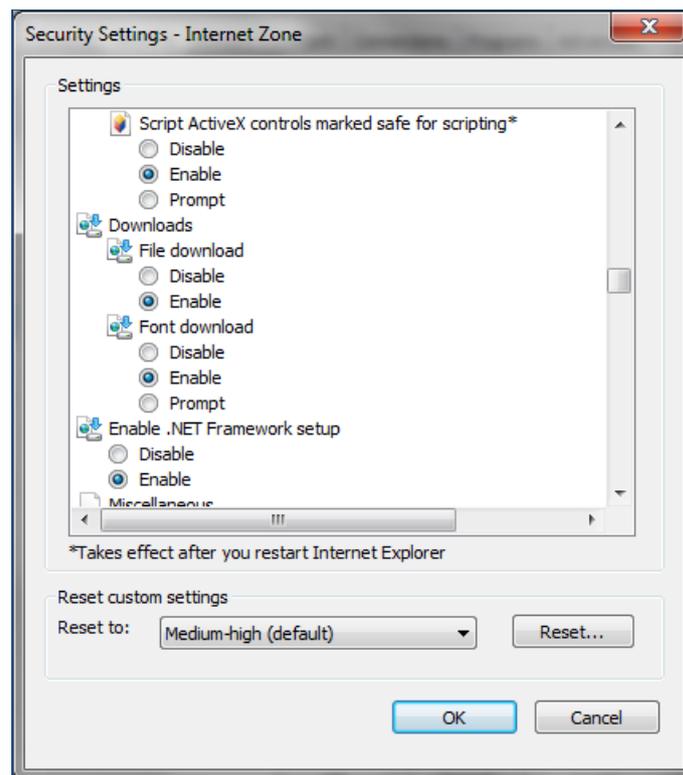
Highlight a generated correspondence and click the **Open** button.

If the document does not display, you may need to adjust the settings in your browser to enable file downloads, but first check with your System Administrator for any restrictions on Internet settings that may be in place at your authority.

The Internet settings can be changed via **Tools | Internet Options**.



Choose the **Security** tab, select **Internet**, and then click the **Custom level** button. Now search for the **Downloads** section.



Enable the **File download** radio button, click the **OK** button to download and view the linked document.

Letters do not have to be generated in sequence. When a letter is generated it shows two dates: **Generated Date** and **Completed Date**.

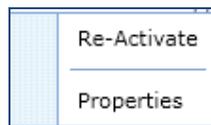
When a letter is generated, the background colour changes to white to show it is completed.

Within the timeline, the individual letter activity changes colour to white to show it is completed; letters do not have to be generated in sequence. When a letter is generated it shows two dates: **Generated date** and **Completed date**.



A letter can be skipped. If it is the only letter defined for the correspondence activity, then the overall activity is also completed at this point. If other letters have to be produced, they can be generated individually (**Generate Correspondence**) or altogether (**Generate All Correspondence**).

A letter that has been skipped or completed can be re-activated by right-clicking on the activity and selecting the **Re-Activate** option.



However if you re-activate a letter then the entry in the communication log is deleted.

When the **Log Response** check box has been selected in the timeline design, the activity cannot be completed until a response from the recipient has been logged.

### Log Response

If at design time the **Response Required** field is set to True, then the **Log Response** link is available.



Clicking the **Log Response** link enables the caseworker to record that the Local Authority has received a response. This is recorded as an **Inbound Correspondence** to a letter that was previously sent as a piece of **Outbound Correspondence**.

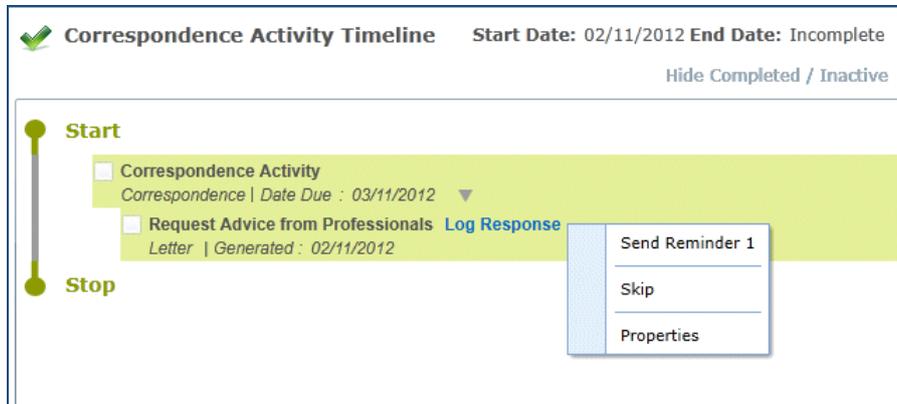


When the letter activity is completed, the activity title, status and date are displayed. The in progress status moves to the next letter activity, if there is one.

If there are more letters to be generated the correspondence activity is still in progress, with the **Date Due** still displayed.

### Send Reminder

Up to two reminders can be defined when the timeline is designed in v4 Client. If the number of days are set for the **First Reminder** and the **Second Reminder**, then once the correspondence has been generated, and if a response has not been logged, then the **Send Reminder 1** option is available when you right-click on the letter activity. This enables you to generate another copy of the original outbound correspondence.



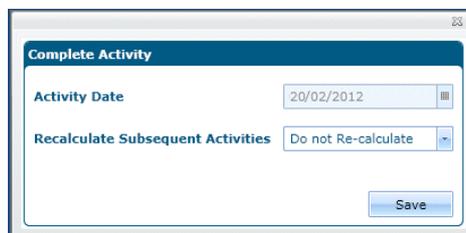
When **Send Reminder 1** has been generated, if a Second Reminder has been requested, the **Send Reminder 2** option is available when you right-click on the letter activity. This enables you to generate another copy of the outbound correspondence.



A workflow message is received when the date for the first reminder is reached for a particular activity. The date for the second reminder is calculated after the first reminder is sent.

### Complete a Correspondence Activity

When the final letter in the correspondence activity is generated, the **Complete Activity** pop-up displays. The **Activity Date** is read-only. You can select whether to **Re-calculate Subsequent Activities** or **Do Not Re-calculate** subsequent activities.



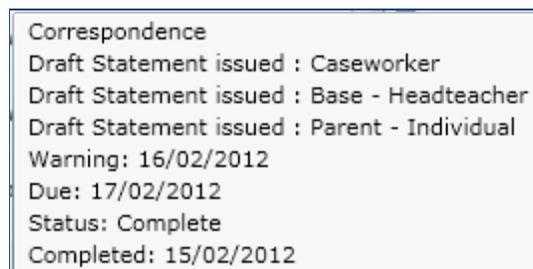
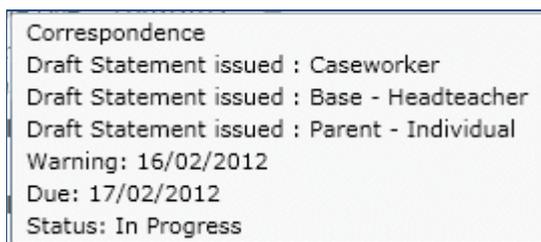
Click the **Save** button.

When the correspondence activity is completed, the activity title, status and dates are displayed.

The header displays the timeline name with the status completed and the **End Date** changes from **Incomplete** to **COMPLETED ON** and the actual date the timeline is completed. The background of the timeline is white. The progress bar has changed to all green. Click the **Save** button to save the timeline on the involvement.

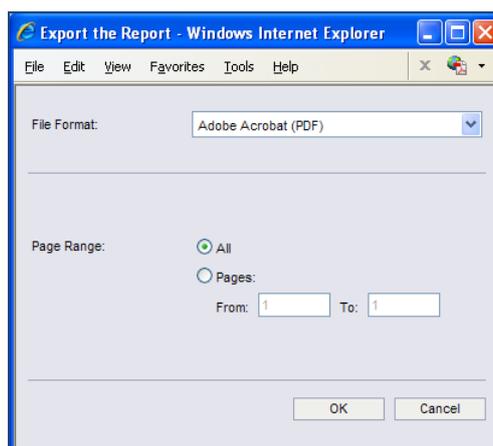


To view the contents and the status of the correspondence activity, whether expanded or collapsed, hover over the activity.



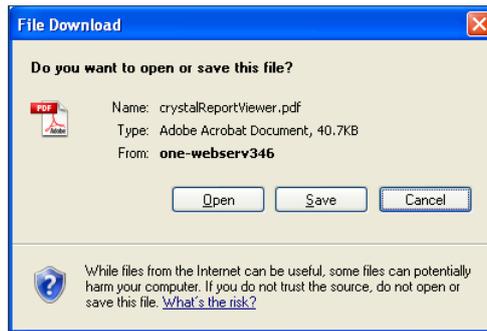
## Export Letter or Report

1. Click the **Export** button to display the **Export the Report** window.



2. Select the **File Format** from the drop-down.
3. Select the radio button for the required **Page Range**.
4. Click the **OK** button to display the **File Download** window.

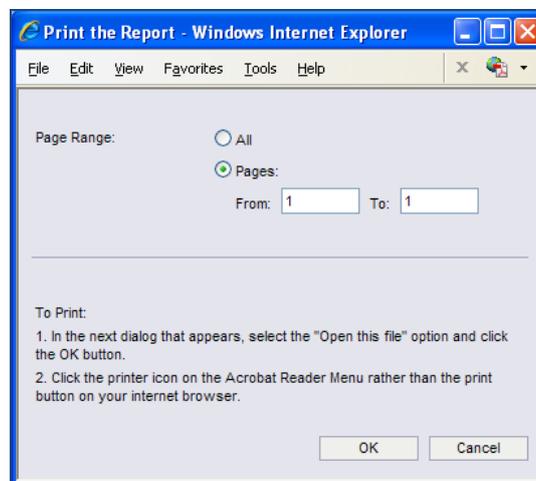
5. Select the **Open** or **Save** button for the letter or report.



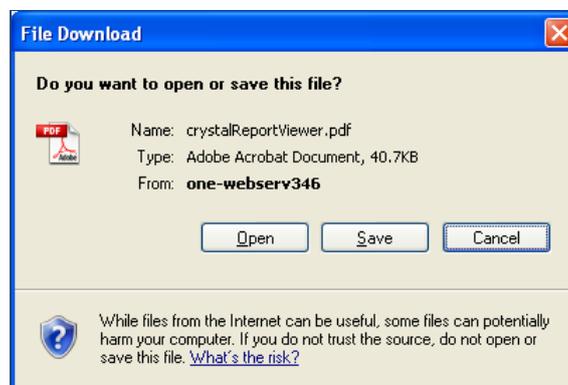
6. Click the **Save** button to export your letter or report to a location of your choosing, checking that it has a correct file **Name**.

### Print Letter or Report

1. Click the **Print** button to display the **Print the Report** window.

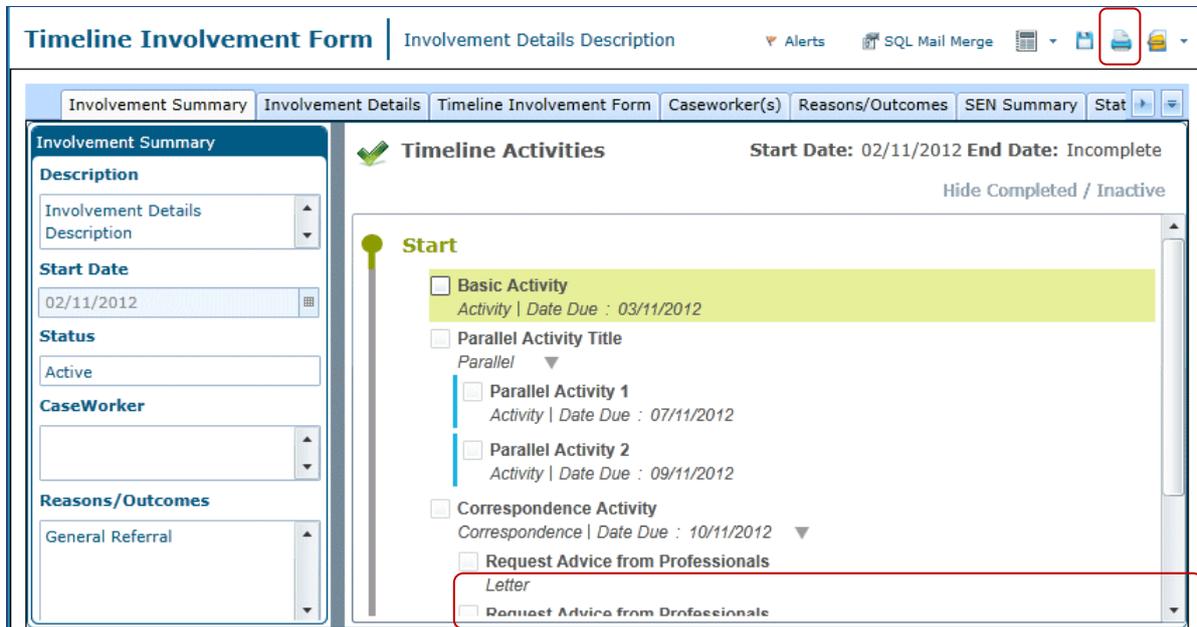


2. Select the radio button for the required **Page Range**.
3. Click the **OK** button.
4. On the **File Download** window select:
  - **Open** - to view the file in PDF format.
  - **Save** - to retain a copy of your letter or report.



### Print Timeline

A timeline can be printed at any stage of the process. Click the **Print** button to open a new **Internet Explorer** window. Select the required **Print** options. The print screen functionality prints only what is shown on the screen and not the complete timeline, as would be seen by using the scrollbar.



## Actions on Workflow Activities

### Timeline Status Icons for Activities

The **Workflow Timeline** details are displayed on the **Involvement Summary | Timeline** panel. The following table describes when the status icon is used and its position in the workflow timeline.

Status Icon	Description	Position in Workflow Timeline
	The timeline is in progress or completed.	Timeline status: Top left corner next to the timeline name in the timeline section. Activity status: No icon is displayed.
	The warning date has been reached or exceeded and target date has been reached.	Timeline status: Top left corner next to the timeline name in the timeline section. Activity status: <ul style="list-style-type: none"> <li>• Progress bar to the left of the respective activity.</li> <li>• Next to the <b>Due Date</b> field or <b>Deadline</b> date or <b>Activity Type</b>.</li> </ul>
	The target date has been exceeded. Note: In v4 Client, the red status icon is shown on the day the target date is reached, whereas in v4 online, it is shown on the day after the target date.	Timeline status: Top left corner next to the timeline name in the timeline section. Activity status: Progress bar to the left of the respective activity.
	The start and stop points on the navigation tree.	Appear on all timelines, cannot be moved.
	Stops workflow of an activity that is in progress (or branch that has not been chosen).	Only used for branch or branch after delay activities.
	Stops workflow of an activity that is completed.	Only used for branch or branch after delay activities.

The status icon displays on the top left corner of the timeline header, next to the timeline name. It also displays on the left of the activities as a progress bar, showing the status of any activity that is in progress, (the previous activity is complete or this is the first activity in the timeline).

Timeline header

✔
**Timeline Activities**
Start Date: 02/11/2012 End Date: Incomplete

Hide Completed / Inactive

---

●
**Start**

**Basic Activity**  
Activity | Date Due : 03/11/2012

Progress bar

⚠
**Timeline Activities 1**
Start Date: 02/11/2012 End Date: Incomplete

Hide Completed / Inactive

---

●
**Start**

⚠

**Basic Activity**  
Activity | Date Due : 03/11/2012

⚠

🚫
**Timeline Activities 1**
Start Date: 02/11/2012 End Date: Incomplete

Hide Completed / Inactive

---

●
**Start**

🚫

**Basic Activity**  
Activity | Date Due : 02/11/2012

⚠

### Expand and Collapse Icons

Right-click the **Expand** or **Collapse** icons to open (expand) or close (collapse) the container activity.



The icon displays next to the **Activity Type**, **Date Due** or the **Deadline Date**, to indicate the current status of the container activities as expanded or collapsed.

●
**Start**

🚫

**Limit Activity Title**
Limit | Deadline : 23/02/2012 ▼

**Activity 1 in Limit**  
Activity | Date Due : 19/02/2012

**Activity 2 in Limit**  
Activity | Date Due : 23/02/2012

●
**Start**

🚫

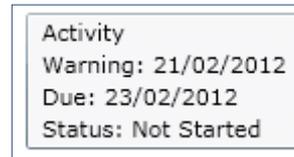
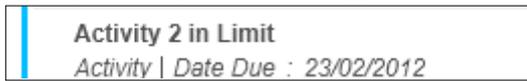
**Limit Activity Title**
Limit | Deadline : 23/02/2012 ▶

## Activity Status

The status of the activity or container activity displays on the respective activity title. Hover over the activity to view the tooltip, showing details of the activity.

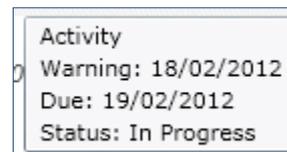
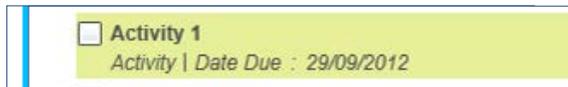
### Not Started

- The background colour of the activity or the container activity is white.
- The **Status** displays as **Not Started** on the tooltip.



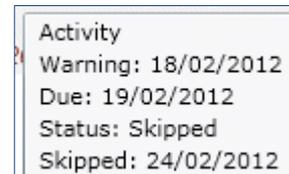
### In Progress

- The background colour of the activity or the container activity is green.
- The **Status** displays as **In Progress** on the tooltip.



### Skipped

- The background colour of the activity or the container activity is white.
- The tooltip displays the **Status** as **Skipped** and the date on which it was skipped.



### Cancelled

- The background colour of the activity or the container activity is white.
- The tooltip displays the **Status** as **Cancelled** and the date on which it was cancelled.



### Completed

- The background colour of the activity or container activity is white.
- The tooltip displays the **Status** as **Completed** and the date on which it was completed.




---

 If appropriate, the tooltip for an activity displays a warning that the timeline deadline has been exceeded and by the number of days.

---

## Dynamic Tool Tips

The following tooltips are examples for each of the different activity types.

### Activity

Activity  
Warning: 06-04-2012  
Due: 13-04-2012  
Status: Not Started

Activity  
Warning: 24/02/2012  
Due: 24/02/2012  
Status: In Progress

Activity  
Warning: 24/02/2012  
Due: 24/02/2012  
Status: Complete  
Completed: 24/02/2012

### Grouping Activity (Limit, Sequence, Parallel)

Limit  
7 Days - Limit Activity  
Status: Not Started  
Deadline: 02/03/2012

Sequence  
Status: Not Started

Parallel  
Status: Complete  
Completed: 23-11-2011

### Grouping Activity (Branch and Branch After Delay)

Branch  
Answer1: Branch Path 1  
Answer2: Branch Path 2  
Status: In Progress

Branch After Delay  
Answer1: Branch AD Path 1  
Warning: 25/02/2012  
Due: 29/02/2012  
Status: Complete  
Completed: 25/02/2012

### Correspondence Activity

Correspondence  
Parent Notification : Caseworker  
Parent Notification : Parent - Joint  
Request Advice from Professionals : Social Services  
Warning: 01/03/2012  
Due: 01/03/2012  
Status: Not Started

Correspondence  
Note in Lieu issued : Parent - Individual  
Warning: 24/02/2012  
Due: 24/02/2012  
Status: Complete  
Completed: 24/02/2012

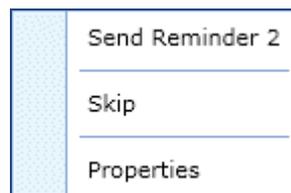
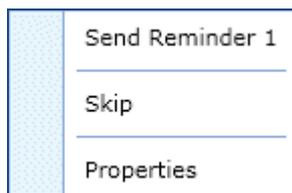
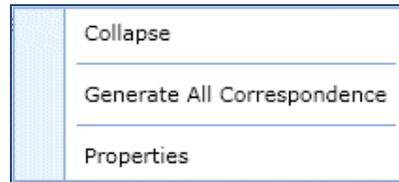
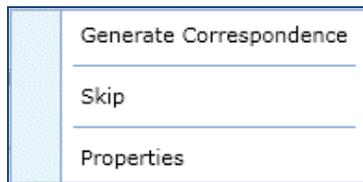
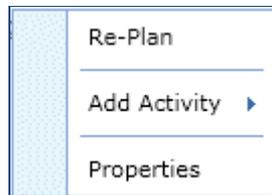
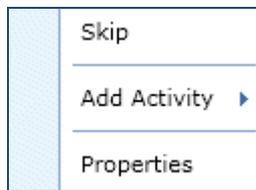
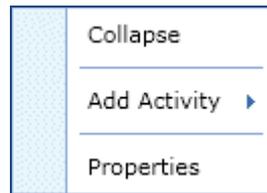
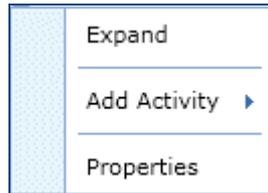
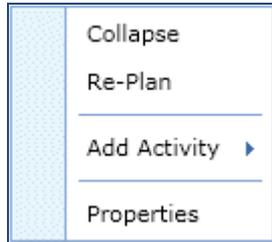
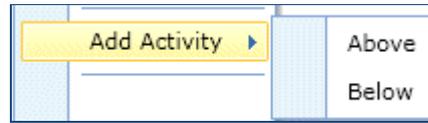
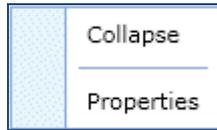
### Letter Activity

Letter  
Parent Notification  
Caseworker  
Status: Not Started

Letter  
Note in Lieu issued  
Parent - Individual  
Status: Skipped  
Skipped: 24/02/2012

## Right-Click Functionality

Right-click on an activity to view the following options, depending on the activity and its status.

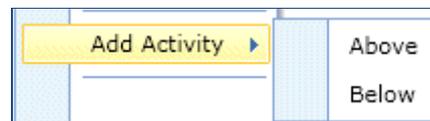


## Add Activity at Run-Time

In Timelines Online, the only activities that can be added at run time are basic activities, i.e. **Activity**



Additional basic activities can be added to the workflow timeline at runtime. To add an activity to the timeline right-click on the in progress activity and select the **Add Activity** option.



The new activity can be added by selecting the **Above** or **Below** option of the respective activity according to the following specified scenarios:

- **Above** or **Below** the activity when it has not started.
- **Below** the activity when it is in progress.
- **Above** the grouping activity (limit, sequence, parallel, branch, branch after delay and correspondence) when it has not started.
- Inside the parallel activity with a vertical blue bar to indicate it is a new parallel task.
- Inside the branch or branch after delay path, when the whole activity has not started or the branch condition alone is in progress.

When a new activity is added, the **Activity Properties** window displays, depending on the type of activity. Enter the relevant information:

- **Activity Properties - Title, Description**
- **Warning Days** – number of days, **Day Type, Warning Message, Message Assignee**
- **Target Days** – number of days, **Day Type, Target Message, Message Assignee**
- **Limit Days**
- **Condition/Question?**
- **Path**
- **Recipient - Recipient Role, Response Required?**
- **Template - Report Template**
- **First Reminder** – number of days until sent, **Report Template**
- **Second Reminder** – number of days until sent, **Report Template**

Click the **Save** button on the **Activity Properties** window to add the new activity to the workflow timeline.

---

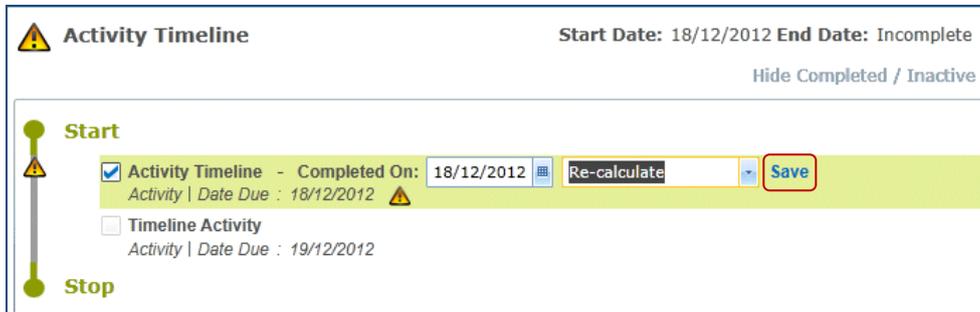
 A new activity cannot be added after a completed activity or before an in progress activity.

---

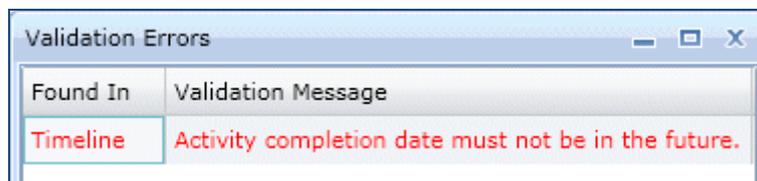
## Re-calculate Warning & Due (Target) Date for Activities

One re-calculates the warning and target dates for all subsequent activities on the timeline, starting from the saved **Completed On** date of the activity that has just been completed, and counting forward the number of warning and target days (using the appropriate **Day Type** for the activity) stored for each subsequent activity. Hover over the activity to view the tooltip, displaying the revised warning and target dates.

Select the check box adjacent to the activity; a set of controls is displayed next to the in progress activity title. The **Completed On** date defaults to the current system date.



The activity completion date cannot be in the future.



In order to re-calculate subsequent activities, select the **Re-calculate** option from the drop-down. In order to leave the subsequent activities unaltered, select the **Do Not Re-calculate** option. Click the **Save** button.

## Skip an Activity

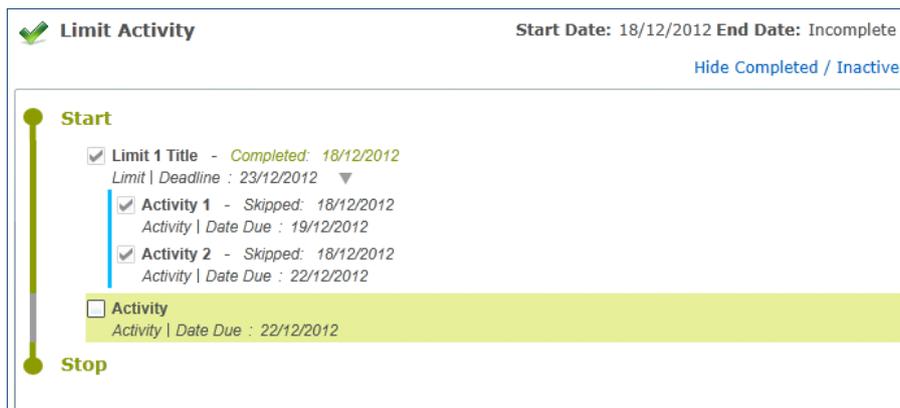
Only an activity that is already in progress can be skipped. To skip an activity, right-click on the activity that is in progress and select the **Skip** option.



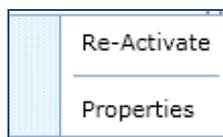
When the activity is skipped, the activity title, status and date are displayed. The check box is disabled, with a tick in it. Hover over the skipped activity to display the tooltip and view the new **Status: Skipped**.



A container activity displays as completed, if all the activities inside the grouping activity are skipped.



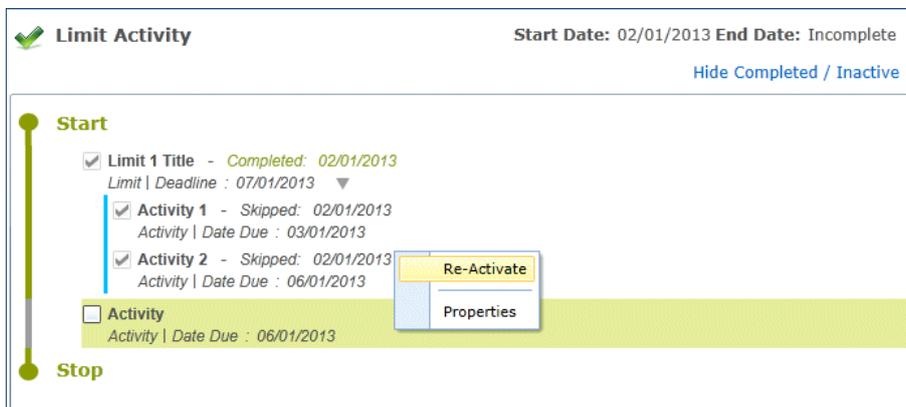
To re-activate a skipped activity (if it is not the last activity) right click on the activity and select the **Re-Activate** option.



## Re-Activate an Activity

A recently skipped or completed activity on the workflow timeline can be reverted to its prior state. Only one activity can be re-activated at a time.

You can re-activate any of the individual activities that have been skipped or completed, by right-clicking on the activity and selecting the **Re-Activate** option.



When an activity has been re-activated the status label next to the respective activity title disappears and depending on its position in the timeline, it has a status of not started or in progress.



If all of the activities on the timeline have been completed then none of the activities can be re-activated.

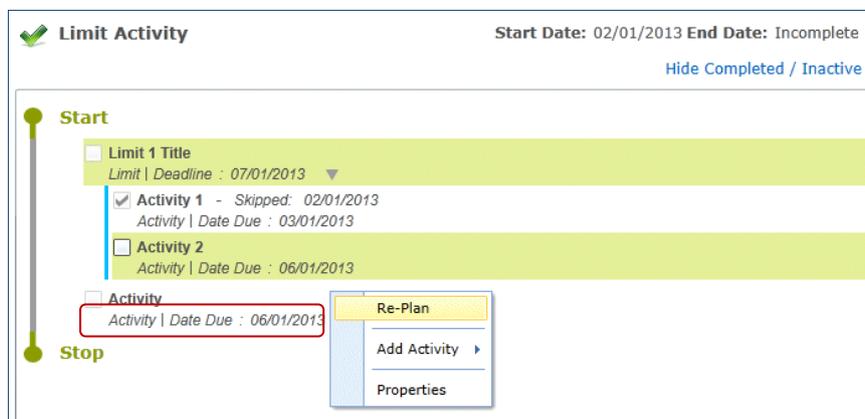
If the activity to be re-activated is a correspondence activity i.e. a letter, the following message is displayed:



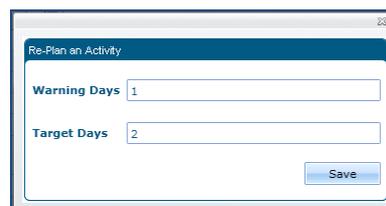
If you select **Yes**, the communication log item that was originally created when the letter was generated will be permanently removed. This is not recoverable. Click the **Yes** button to re-activate the activity; click the **No** button to return to the timeline, without making any changes.

## Re-Plan Timeline

Only an activity that is not started can be re-planned (the background colour of a not started activity is white). As soon as the activity is in progress (the background colour is green), it cannot be re-planned.



To re-plan an activity, right-click on the activity and select the **Re-Plan** option to display the **Re-Plan an Activity** window.



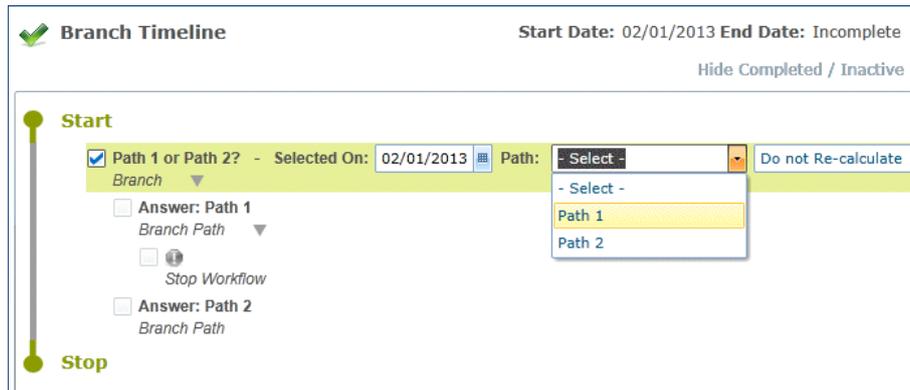
Modify the **Warning Days** and **Target Days** fields as required; click the **Save** button.

The warning days and the target days of the re-planned, and all subsequent activities, are changed on the timeline. Hover over the activity to view the respective activity's properties.

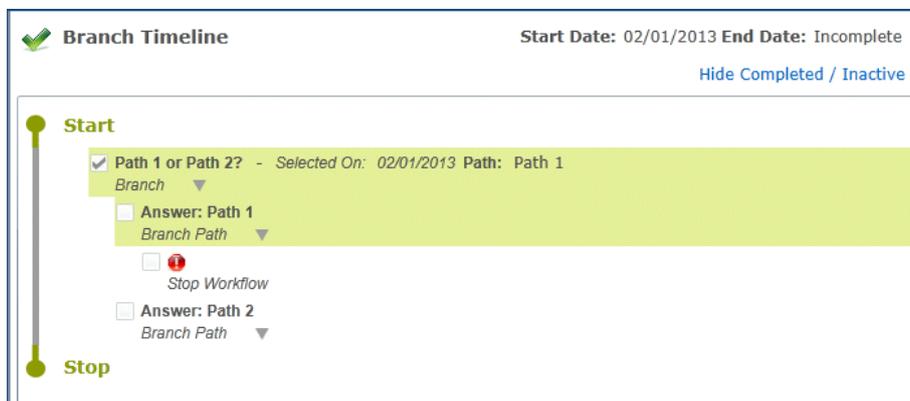


## Stop Workflow Activity

The stop workflow activity is only used for branch and branch after delay activities.



If this activity is inserted into a timeline when it is designed, then when this path is selected at run-time, it completes the timeline and stops the workflow, ignoring all subsequent activities. The stop workflow icon changes from grey to red.



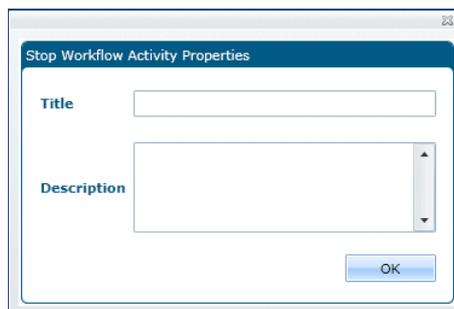
When the last activity on the selected branch path is completed by reaching the stop workflow, the activity title, status and date are displayed. The check box of the branch or branch after delay conditions and the selected branch path are checked and disabled.

 The branch and branch after delay activities have the same set of controls to select the required path and complete the activities

## Stop Workflow Properties

The stop workflow activity is only used for branch activities and branch after delay activities. When the **Stop Workflow** icon is reached, One completes that section of the timeline and moves onto the next activity or grouping activity.

Right-click on the **Stop Workflow** icon to view the **Stop Workflow Activity Properties** window.



 The **Stop Workflow Properties** window displays read-only information. These properties are set when the timeline is designed in **v4 Client | Tools | Administration | Timeline | Timeline Design**.

## Completing Grouping Activities

The grouping activities are displayed as completed, only when all of the activities inside the grouping activity are completed. When a grouping activity is completed, the activity title, status and date are displayed. The check box is disabled and checked.

If the activity is completed on or before the **Date Due**, the text is green.  
 If the activity is completed after the **Date Due** specified, the text is red.



The background colour of a completed grouping activity is white.

## Progress Bar

When an activity is in progress or not started, the vertical progress bar on the left side of each activity is grey. This gradually increases to green, as the activity is completed or skipped.




---

 The vertical progress bar of grouping activities (containers) is increased only when all of the activities inside the grouping activity are completed or skipped.

---

When all of the activities in the timeline are completed or skipped, the progress bar on the left margin displays in green from **Start** to **Stop**.



### Hide Completed / Inactive and Show All

Click the **Hide Completed / Inactive** button to hide any activities that have been completed or made inactive. Clicking the **Hide Completed / Inactive** button displays the remaining in progress activity as the first activity in the timeline.



Click the **Show All** button to view all activities in the timeline, whether in progress, re-planned, skipped or completed.



If all of the activities have been completed, then when you click on the **Hide Completed / Inactive** button, all that remains visible are the **Start** and **Stop** icons and the **Show All** button.



The parent container is hidden, when all of the activities inside the respective container are completed or skipped.

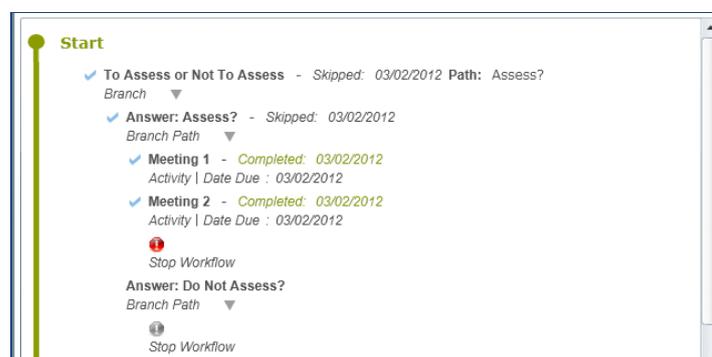
## Scenarios When Workflow Timeline Completes

The workflow timeline displays as completed in the following scenarios:

- The last activity in the timeline has been skipped or completed. The **Completed** or **Skipped** date of the last activity in the timeline displays on the timeline header with **COMPLETED ON** to indicate that the workflow timeline is complete.



- The stop workflow activity is reached on the selected branch path in a branch or branch after delay activity.



The **Incomplete** status is displayed on end date in the timeline header, until the last activity is completed or skipped or the stop workflow activity is reached.

## Timeline Data Transfer

Timelines reporting data, which used to be transferred automatically to the Oracle tables each time an activity was completed or skipped in the client, is now transferred using a scheduled task. Capita One recommends you run the transfer task twice daily at 1 a.m. and 1 p.m.

Although the default is to use a scheduled task to transfer timeline reporting data, you can configure One to transfer this information each time an activity is completed or skipped. Please see ***Setting the Status of the Timeline Data Transfer Facility*** for more information.

Please note, completed timeline activities continue to be saved in real time when saving from v4 Client and v4 Online. This change does not mean that completed or skipped timeline activities are only saved periodically. However, some of the reporting data associated with a completed or skipped timeline activity is saved on a scheduled basis rather than continuously.

The routine copies existing v4 timeline data from the SQL database to the Oracle database. In addition, it automatically stores any timelines, which are associated to an involvement form, in both the SQL database and the Oracle database when the involvement form is saved.

The activity status is shown correctly in the timeline itself, but if you produce reports, the data may show a different status than that shown on the timeline, depending on the time at which the reporting data was last saved to the Oracle database.

### Setting the Status of the Timeline Data Transfer Facility

The setting TIMELINEDATATRANSFER found within Application.ini, is set by Capita to FALSE. If you prefer synchronised data over faster performance, you can change this setting to TRUE via the Configuration Management tool. The global setting overrides any individual client settings.

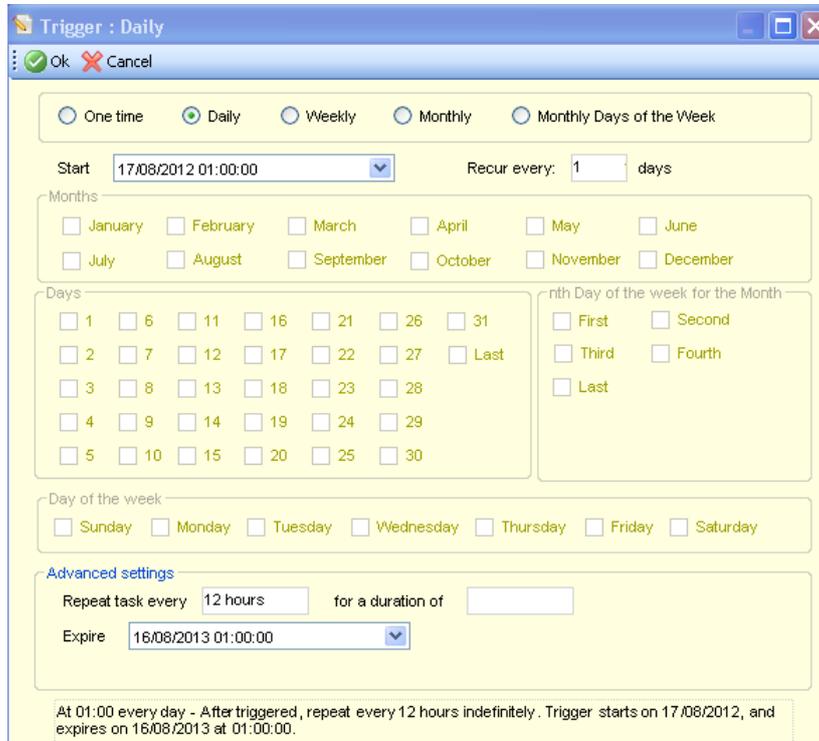
### Creating the Scheduled Task to Transfer Timelines Reporting Data

If you leave the setting TIMELINEDATATRANSFER as FALSE, then you must create a scheduled task that transfers the data periodically (unless you never want to report on Timelines). Capita have created the task to be used, but each LA must set this task up for themselves.

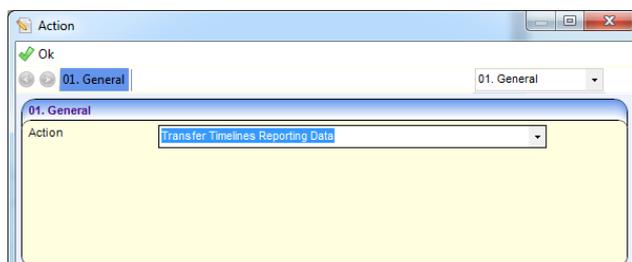
1. In the v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** page.

2. Click the **New** button.
3. Enter a **Name** (e.g. Transfer Timelines Reporting Data).

4. Enter a **Description**.
5. Ensure the **If the task is already running, then the following rule applies** drop-down list is set to **Do not start a new instance**.
6. In the **Trigger** panel, click the **Add** button to display the **Trigger** dialog.



7. Select the **Daily** radio button.
8. From the **Start** drop-down list, select the date and time at which you want the task to start.
9. Ensure the **Recur** every field is set to 1 days.
10. In the **Advanced** settings area, enter 12 hours in the **Repeat Task every** field.
11. Select an **Expire** date and time.
12. Click the **OK** button to close the dialog.
13. In the **Actions** panel, click the **Add** button to display the **Action** dialog.



14. From the **Action** drop-down list, select your task e.g. Transfer Timelines Reporting Data.
15. Click the **OK** button.
16. Click the **Save** button.

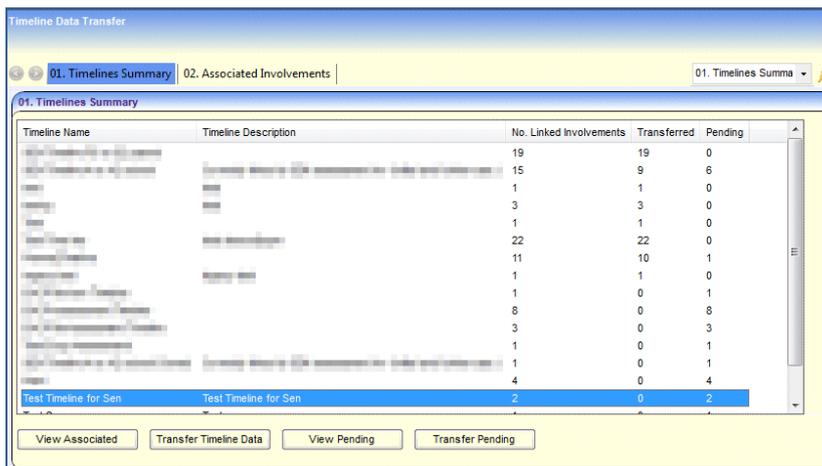
## Running the Timelines Data Transfer Routine

The timelines data transfer routine moves any pre-existing active v4 timeline information currently stored in the SQL database to the Oracle database. For active timelines that are running, users can choose to transfer data for any number of timelines.

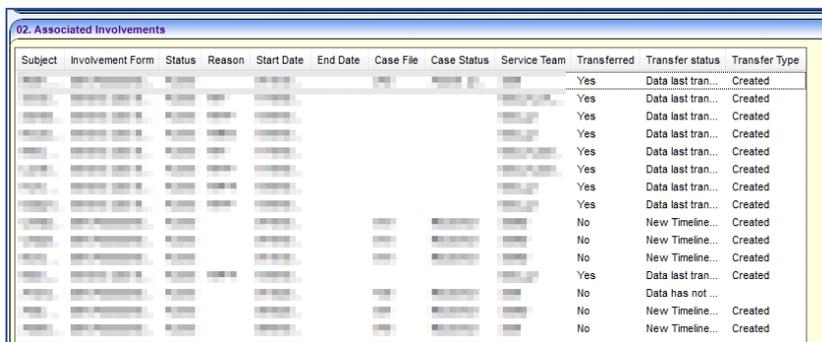
**NOTE:** This process can be run as often as requested and One moves the whole snapshot of timeline data each time; it will not simply move a snapshot of data from the last time this process was run.

To run the **Timelines Data Transfer** routine:

1. In the v4 Client, select **Tools | Administration | Timeline Data Transfer** to display the **Timeline Data Transfer** page.



2. Select a timeline listed in the **Timeline Summary** panel and click the **View Associated** button. The involvements that are associated with the timeline are displayed below in the **Associated Involvements** panel.



Timelines associated to an involvement form are automatically stored in both the SQL database and the Oracle database.

3. Select one or more timelines and click the **Transfer Timeline Data** button; this transfers the data stored in the SQL database to the Oracle database.

Any timelines that have already been associated to an involvement form and have been completed will not be included in the timeline data transfer.

## Timeline Reporting

As a result of timeline information being stored in the Oracle database, it is possible for users to report on v4 timeline information using Crystal Reports.

### Database Table Structure

There are two main tables created to hold the whole timeline data:

- TIMELINE\_ACTIVITY
- TIMELINE\_ACTIVITY\_PROPERTY

The data held within these two tables constructs the whole timeline workflow.

### TIMELINE\_ACTIVITY

This table holds the snapshot of all timeline activities.

**NOTE:** This table includes system generated workflow activities as well - which are not visible in the user interface.

Column Name	Type	Nullable	Default	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)			Primary Key
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Y		Numeric Parent ID Link
TIMELINE_ID	NUMBER(10)	Y		Reference to the Involvement Timeline
WORKFLOW_GUID	VARCHAR2(36)			Workflow Instance Identifier
PARENT_ACTIVITY_INDEX	VARCHAR2(2000)			Parent Tree Index based on 1.0.1.2 syntax
ACTIVITY_INDEX	VARCHAR2(2000)			Activity Tree Index based on 1.0.1.2 syntax
ACTIVITY_TYPE	VARCHAR2(2000)	Y		Activity Type
QUALIFIED_NAME	VARCHAR2(512)	Y		Qualified Name
DESCRIPTION	VARCHAR2(2000)	Y		Description
STATUS	VARCHAR2(64)	Y		Status
EXECUTION_STATUS	VARCHAR2(64)	Y		Execution Status
EXECUTION_RESULT	VARCHAR2(64)	Y		Execution Result
ENABLED	NUMBER(1)	Y		
CHILD_ACTIVITY_COUNT	NUMBER(4)	Y		Count of Child Activities for the activity
CREATED_DATE	DATE	Y	sysdate	Date created

## TIMELINE\_ACTIVITY\_PROPERTY

This table holds the property values for all timeline activities.

Column Name	Type	Nullable	Default	Comments
TIMELINE_ACTIVITY_PROPERTY_ID	NUMBER(10)			Primary Key
TIMELINE_ACTIVITY_ID	NUMBER(10)	Y		Reference to the Timeline Activity record
PROPERTY_NAME	VARCHAR2(64)	Y		Name of property
PROPERTY_VALUE	VARCHAR2(2000)	Y		Value of Property
PROPERTY_TYPE	VARCHAR2(2000)	Y		Property Type
CREATED_DATE	DATE	Y	Sysdate	Date created

## Views

The following views are a set of Oracle views created to assist with timeline reporting. These views hold the timeline snapshot, as is visible on the screen (e.g. the **Launch Timeline** button on an Involvement form).

- V\_TIMELINE\_TREE
- V\_TIMELINE\_ACTIVITY
- V\_TIMELINE\_CORRESPOND\_ACTIVITY
- V\_TIMELINE\_LETTER\_ACTIVITY
- V\_TIMELINE\_LIMIT\_ACTIVITY
- V\_TIMELINE\_BRANCHED\_ACTIVITY
- V\_TIMELINE\_PARALLEL\_ACTIVITY

## V\_TIMELINE\_TREE

This is the base line view which holds all the details of timeline activities and their most common properties.

Column Name	Type	Comments
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description in hierarchal order.
TITLE	VARCHAR2(2000)	Title
WARNING_DATE	DATE	Warning Date
TARGET_DATE	DATE	Target Date
STATUS	VARCHAR2(64)	Status
ACTIVITY_TYPE	VARCHAR2(2000)	Activity Type
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent Activity ID
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index
TIMELINE_ID	NUMBER(10)	Timeline ID
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID
INVOLVEMENT_ID	NUMBER(10)	Involvement ID

The following SELECT statement from this table will give a list of all activities in hierarchal order:

```
SELECT * FROM V_TIMELINE_TREE T ORDER BY T.ACTIVITY_INDEX;
```

ACTIVITY_DESCRIPTION	TITLE	WARNING_DATE	TARGET_DATE	STATUS	ACTIVITY_TYPE
Notify Parents - Due Date: 13/04/2010	Notify Parents	13/04/2010 00:00:00	13/04/2010 00:00:00	Complete	CSSCorresponde
Parent - Parent Notification				Skipped	CSSLetterActivity
SEN Assessment Limit - Start Date: 13/04/2010 - Limit Date: 12/25/2010	SEN Assessm		12/10/2010 00:00:00	InProgress	CSSLimitedSeque
Decision to Assess Limit - Start Date: 13/04/2010 - Limit Date: 22/05/2010	Decision to At		25/05/2010 00:00:00	Complete	CSSLimitedSeque
Parental Views Time Limit   Assessment Panel Meeting - W	Parental View			Complete	CSSParallelActivit
Parental Views Time Limit - Warning Date: 12/05/2010	Parental View	12/05/2010 00:00:00	12/05/2010 00:00:00	Complete	CSSActivityWithW
Assessment Panel Meeting - Warning Date: 28/04/2010	Assessment F	28/04/2010 00:00:00	12/05/2010 00:00:00	Complete	CSSActivityWithW
Assessment Panel Decision - Warning Date: 19/04/2010	Assessment F	19/04/2010 00:00:00	26/04/2010 00:00:00	Complete	CSSBranchedActi
Seek Advice - Start Date: 13/04/2010 - Limit Date: 22/06/2010	Seek Advice		22/06/2010 15:25:00	InProgress	CSSLimitedSeque
LEA Seek Advice - Start Date: 13/04/2010	LEA Seek Ad		25/05/2010 15:25:00	InProgress	CSSLimitedSeque
Request SEN Advice - Due Date: 13/04/2010	Request SEN	13/04/2010 15:25:00	13/04/2010 15:25:00	Complete	CSSCorresponde
Inv - Ed Psychologist - Request				Skipped	CSSLetterActivity
Medical Officer - Request				Skipped	CSSLetterActivity
Base - Headteacher - Request				Skipped	CSSLetterActivity
Social Services - Request				Skipped	CSSLetterActivity
Others - Request Advice				Skipped	CSSLetterActivity
All Advice Received - Warning Date: 18/05/2010	All Advice Re	18/05/2010 15:25:00	25/05/2010 15:25:00	InProgress	CSSActivityWithW
Statement Panel Meeting - Warning Date: 08/06/2010	Statement Par	08/06/2010 15:25:00	22/06/2010 15:25:00	NotStarted	CSSActivityWithW
Statement Decision Limit - Start Date: 22/06/2010 - Limit Date: 06/07/2010	Statement De		06/07/2010 15:25:00	NotStarted	CSSLimitedSeque
Issue Draft/Proposed Statement or Note for Issue Draft/Pr	Issue Draft/Pr			NotStarted	BranchedActivity
Issue Draft/Proposed Statement or Note for Issue Draft/Pr	Issue Draft/Pr	29/06/2010 15:25:00	06/07/2010 15:25:00	NotStarted	CSSCorresponde
Parent - Draft Statement Issued				NotStarted	CSSLetterActivity
Issue Note in Issue - Warning Date: 29/06/2010	Issue Note in I	29/06/2010 15:25:00	06/07/2010 15:25:00	NotStarted	CSSLetterActivity

ACTIVITY\_DESCRIPTION is displayed in hierarchal order as it is seen on the above graphic.

### V\_TIMELINE\_ACTIVITY

This view holds the additional properties of a generic timeline activity.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
WARNING_DATE	DATE	Warning DATE - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type
WARNING_MESSAGE	VARCHAR2(2000)	Warning Message
WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee
TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
TARGETDAYS	NUMBER	Target Days
TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
WORKINGDAYBASE	VARCHAR2(2000)	Working Day Base
END_DATE	DATE	End Date
LINKED_FIELD	VARCHAR2(2000)	Linked Field

## V\_TIMELINE\_CORRESPOND\_ACTIVITY

This view holds the additional properties of a correspondence activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
WARNING_DATE	DATE	Warning Date - From V_TIMELINE_TREE
TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Status - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type
WARNING_MESSAGE	VARCHAR2(2000)	Warning Message
WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee
TARGETDAYS	NUMBER	Target Days
TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
END_DATE	DATE	End Date

## V\_TIMELINE\_LETTER\_ACTIVITY

This view holds the additional properties of a letter activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent ID to identify parent Corresp. Activity
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
RECIPIENT_ROLE_CODE	VARCHAR2(2000)	Recipient Role Code
RECIPIENT_ROLE_DESCRIPTION	VARCHAR2(2000)	Recipient Role Description
ISRESPONSEREQUIRED	VARCHAR2(2000)	Is Response Required
REPORTTEMPLATE	VARCHAR2(2000)	Report Template
REMINDER1_NODAYS	NUMBER	Reminder 1 – No of days

REMINDER1_REPORTTEMPLATE	VARCHAR2(2000)	Reminder 1 – Report Template
REMINDER2_NODAYS	NUMBER	Reminder 2 – No of days
REMINDER2_REPORTTEMPLATE	VARCHAR2(2000)	Reminder 1 – Report Template
GENERATED_DATE	DATE	Letter generated date
COMPLETED_DATE	DATE	Completed Date
REMINDER1_DATEGENERATED	DATE	Reminder 1 – Date generated
REMINDER2_DATEGENERATED	DATE	Reminder 2 – Date generated
LINKED_FIELD	VARCHAR2(2000)	Linked Field

### V\_TIMELINE\_LIMIT\_ACTIVITY

This view holds the additional properties of a limit activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
TITLE	VARCHAR2(4000)	Title - From V_TIMELINE_TREE
TARGET_DATE	DATE	Target Date
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
LIMIT_DAYS	NUMBER	Limit Days
DAY_TYPE	VARCHAR2(2000)	Day Type
START_DATE	DATE	Start Date

### V\_TIMELINE\_BRANCHED\_ACTIVITY

This view holds the additional properties of a branched activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index - From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
CONDITION	VARCHAR2(2000)	Condition
CONDITION_CHOSEN	VARCHAR2(2000)	Chosen Condition
WARNING_DATE	DATE	Warning DATE - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type

WARNING_MESSAGE	VARCHAR2(2000)	Warning Message
WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee
TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
TARGETDAYS	NUMBER	Target Days
TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
WORKINGDAYBASE	VARCHAR2(2000)	Working Day Base
END_DATE	DATE	End Date

### V\_TIMELINE\_PARALLEL\_ACTIVITY

This view holds the additional properties of a parallel activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
END_DATE	DATE	End Date