Reference Guide

Timelines

Creating a Timeline

A timeline is a set of predefined activities that depict some of the processes in One v4 Client in a graphical format. Although it is optional to link a timeline to an involvement form, for CSS, it is necessary to do this in order for a timeline to function correctly with an involvement form. For more information, see *RG_Involvements_Linking a Timeline to an Involvement*.

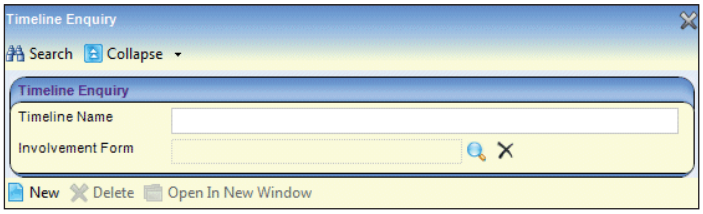
A caseworker or administrative officer follows a timeline when dealing with a particular type of involvement. As these activities are intended to be followed each time a new involvement is created, the timeline design can be reused by creating an instance of it with an involvement.

A timeline can be deleted, but once it is deleted, it cannot be retrieved. For more information, see *RG_Timelines_Deleting a Timeline*.

Creating a Timeline

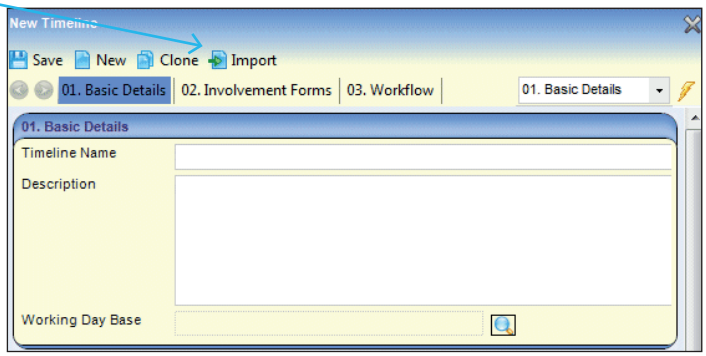
To create a timeline:

1. Select **Tools | Administration | Timeline | Timeline Design** to display the **Timeline Enquiry** page.
2. Click the **New** button to display the **New Timeline** page.



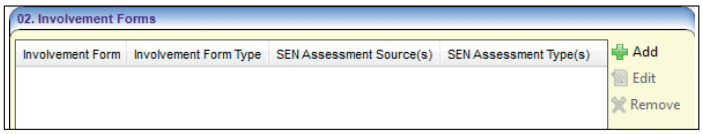
A timeline can be cloned.

There are some sample SEN and SEND EHCP timeline templates available to import.



3. On the **Basic Details** panel, enter a **Timeline Name**. This can be up to 50 characters, it must be alpha numeric and cannot contain any symbols.
4. Enter a **Description**, up to 250 characters.
5. If required, select a **Working Day Base**. This is the number of working days that elapse between the activities and when they become due. For more information, see *Creating a Working Day Base*.
6. On the **Involvement Forms** panel, click the **Add** button to select an involvement form. If you are using CSS, the timeline must be linked to an involvement form.

   A timeline cannot be saved until it contains at least one activity. It is therefore advisable to add one activity, so that you can save your timeline now.



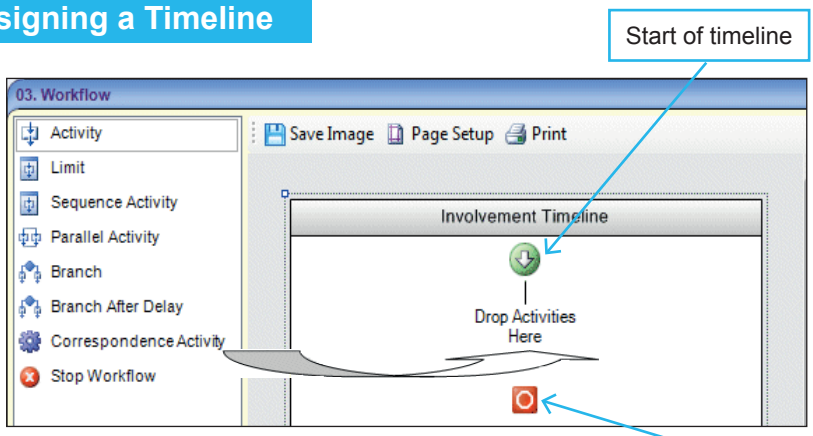
Designing a Timeline

The timeline is designed on the **Workflow** panel.

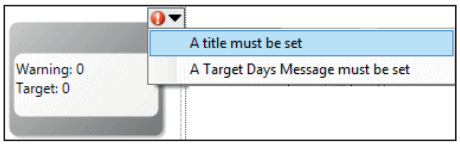
Activities are selected from the list on the left hand side of the panel; any number of activities can be used to create a timeline. Each activity consists of different properties.

Using the drag and drop functionality, activities are placed onto the **Involvement Timeline** area.

Once a timeline is in progress, **Add** icons are displayed to inform you where additional activities can be placed.



Once an activity has been placed on the timeline, a warning icon is displayed on the header to inform you that certain details must be set. Clicking the drop-down displays the items required for that activity.



You can save the timeline at any time, providing all the warning icons have been eliminated.

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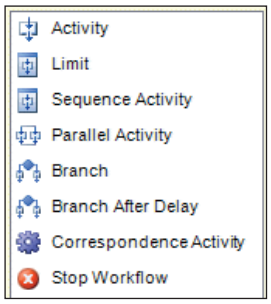
Timeline Workflow Properties



The timeline workflow activities consist of a number of different properties. Double-click on the **Container Header** and the **Activity Header**, or select the warning icon, to display the **Activity Properties** dialog.

Enter the relevant details for the selected activity as displayed below.

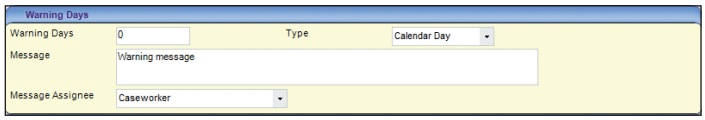
The majority of the fields are mandatory. If any required fields are not populated, a warning message is displayed at the bottom of the **Activity Properties** dialog.

Stop Workflow is used to terminate a timeline when it is placed on one path of the Branch or Branch After Delay activities.

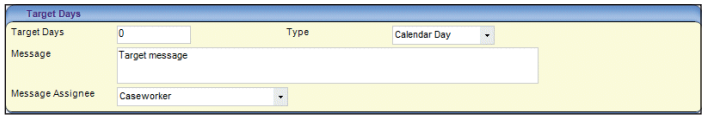
The panels on the **Activity Properties** dialog are displayed depending on which activity category has been selected.

The **Basic** panel is used for all activities, except Stop Workflow. Branch and Branch After Delay only require the **Description**.

The **Warning Days** panel is used for all activities. It advises the number of days in which an activity needs to be completed.

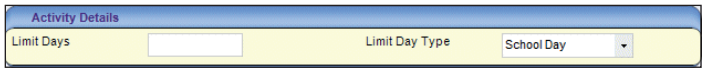


The **Target Days** panel is used for Activity, Sequence Activity, Parallel Activity and Branch After Delay. It advises that the activity is due to be completed *today*.

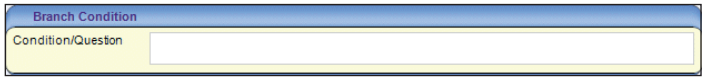


The **Linked Field** panel is used for Activity, Sequence Activity, Parallel Activity and Correspondence Activity. It links the activity to a selected **Date** field on an involvement.

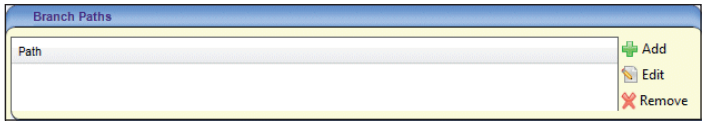
The **Activity Details** panel is used only for Limit. It defines the maximum number of days in which a group of activities must be completed.



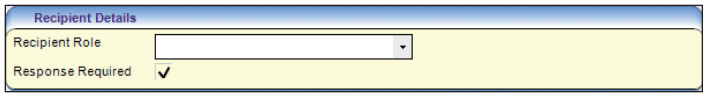
The **Branch Condition** panel is used for Branch and Branch After Delay. It defines multiple routes on the timeline by creating a condition or question, e.g. *To assess or not assess?*



The **Branch Paths** panel is used for Branch and Branch After Delay. It is the outcomes or answers to the **Branch Condition** panel, e.g. *Path 1 - Yes, assess. Path 2 - No, do not asses.* Only one path can be selected to continue the timeline.

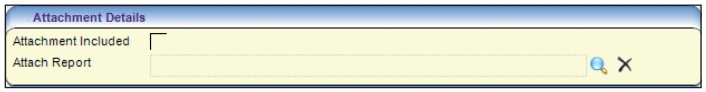


The **Recipient Details** panel is used for Correspondence Activity. It generates outbound correspondence to a role in the form of letters and emails. A response can be requested.

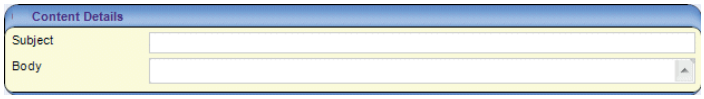


The **Template Details** panel is used for sending correspondence via a letter. A report template can be selected.

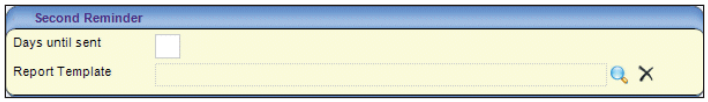
The **Attachment Details** panel is used for Correspondence Activity. It is only used for emails. It displays the report or letter that is attached to an email.



The **Content Details** panel is used for Correspondence Activity. It is only used for emails. It displays information about the contents of the email.



The **First Reminder** and **Second Reminder** panels are used for Correspondence Activity. They are used for both letters and emails. The panels display the number of days before a reminder is sent. An attachment can be included.



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Creating a Working Day Base

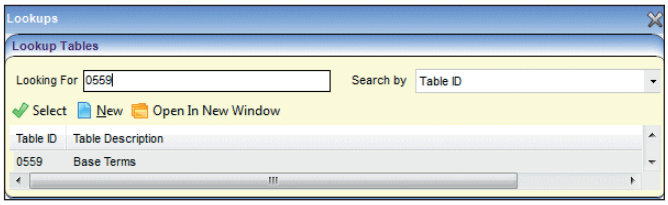
Setting up a working day base for selection on a timeline is a three step process.

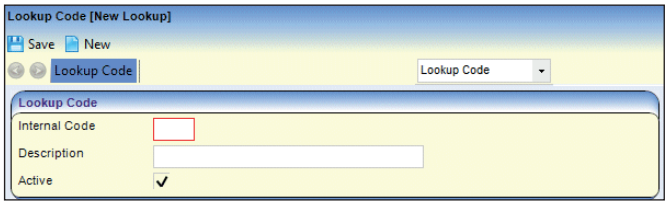
- Setting up a base term lookup.
- Setting up a base definition.
- Adding opening and closing dates and times.

Setting up a Base Term Lookup

Step 1. Setting up a Base Term Lookup

1. In the v4 Client, select **Tools | Administration | Lookups** to display the **Lookups** page.
2. On the **Lookup Tables** panel, select and open **Table_ID 0559 Base Terms** to display the **Lookup Code [0559 - TABLE_ID]** dialog below the panel.
3. Click the **New** button to display the **Lookup Code [New Lookup]** dialog.
4. On the **Lookup Code** panel, enter an **Internal Code** (*<CSSW>*).
5. Enter a **Description** (*<CSSW CSS Working Day Base>*)
6. Select the **Active** check box.
7. Click the **Save** button.

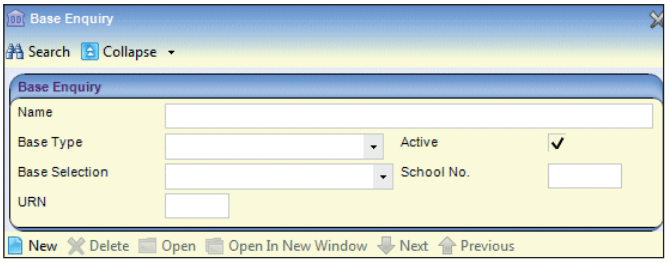




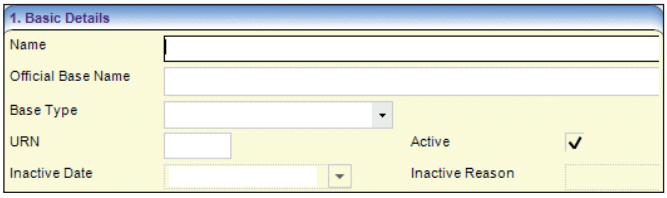
Setting up a Base Definition

Step 2. Setting up a Base Definition

1. In the v4 Client, select **Focus | Bases | Bases** to display the **Base Enquiry** page.
2. Click the **New** button to display the **Base Definition** page.
3. Select **No** to the **Do you wish to add a Base from the National Database?** question.



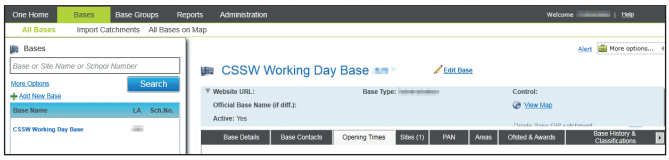
4. On the **Basic Details** tab, enter a name for the working days base.
5. Select a **Base Type**.
6. Select the **Active** check box.
7. Click the **Save** button.

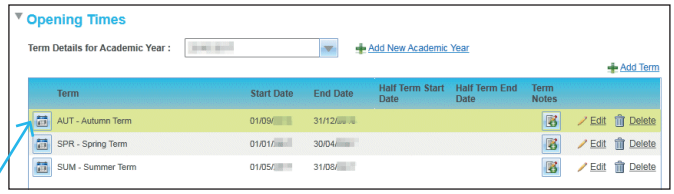


Adding Dates and Times

Step 3. Adding Opening and Closing Dates and Times

1. Click the **Bases Online** button at the top of the **Base Definition** page to display the **Bases | All Bases *<CSSW Working Day Base>* Base Details** page in v4 Online.
2. Select the **Opening Times** tab.
3. Select the **Academic Year** for the required year to display the term opening times for the three terms.
4. Delete two of the terms from the browse.
5. Click the **Edit** button on the remaining term to display the **Term Details/Time Details** dialog.





The calendar icon is used to set holidays and closure dates.

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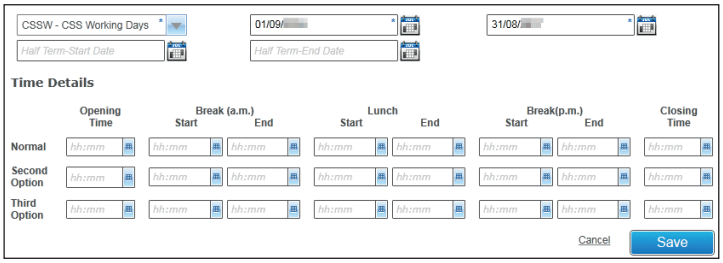
Timelines

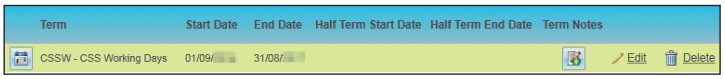
Creating a Timeline

Adding Dates and Times cont'd

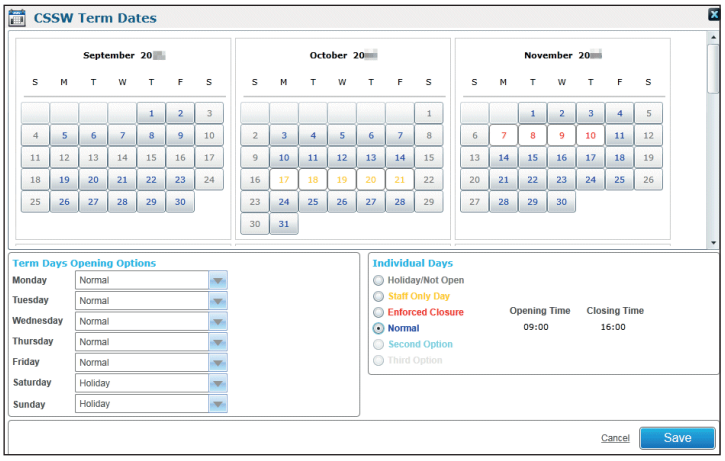
6. Change the **Term** type to *<CSSW - CSS Working Days>*.
7. Change the **Start** and **End** dates to the beginning and end of the working year.
8. Select an **Opening Time** and a **Closing Time**.
9. Click the **Save** button to display the new working year details.



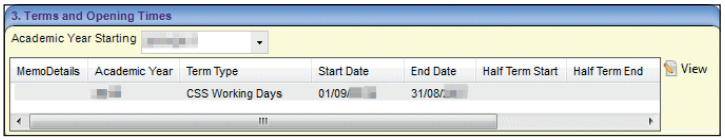
10. Click the **Calendar** icon to display the **CSSW Term Dates** dialog.



11. Using the **Individual Days** radio buttons, select **Holiday/ Not Open**, **Staff Only Day** or **Enforced Closure** against the days the working base is closed, i.e. Christmas Day, Bank Holidays, training days etc.
12. Click the **Save** button.

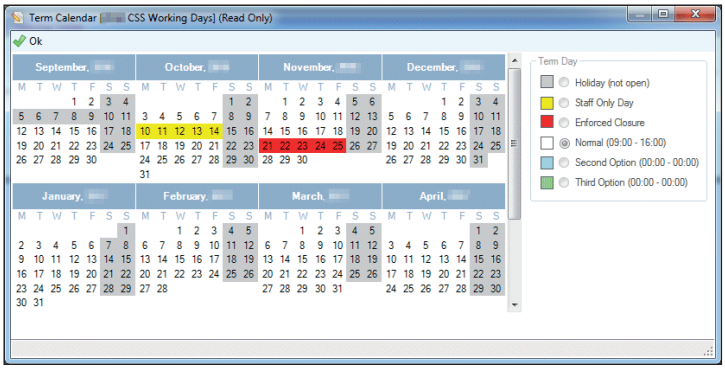


13. In the v4 Client, return to the **Base Definition** page.
14. Click the **Save** button to populate the **Terms and Opening Times** panel.
15. Click the **View** button to display the read-only **Base Term Details** dialog.



16. Click the **Term Calendar** button at the top of the dialog to display the read-only calendar for the selected year.
17. Click the **OK** button to close the **Term Calendar** dialog.
18. Click the **OK** button to close the **Base Term Details** dialog.

The working day base is now available for selection when creating a timeline.



You can view the details of the calendar in v4 Client, but any changes must be made in v4 Online.

Each year (usually in January) ensure a new year is added against the working base, this needs to be done in advance for long timelines.

Related Reference Guides:

- RG_Timelines_Deleting a Timeline
- RG_Involvements_Linking a Timeline to an Involvement

CAPITA