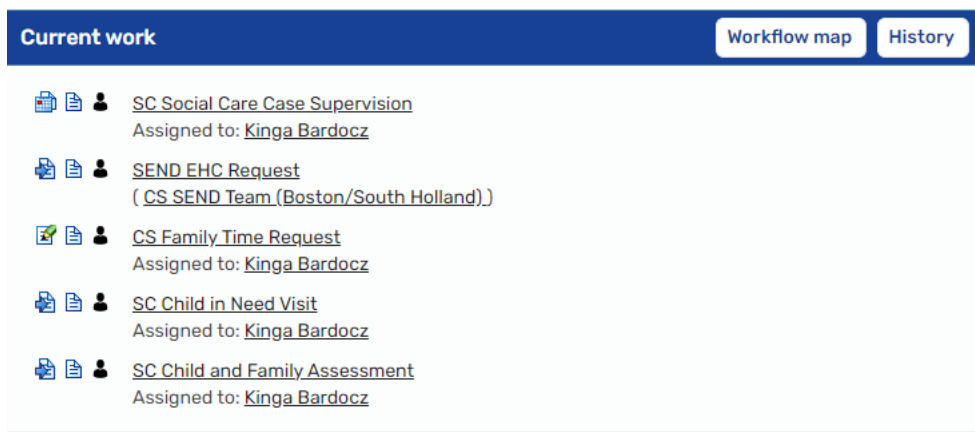


Children's Services Quick Guide





Using the Workflow Map

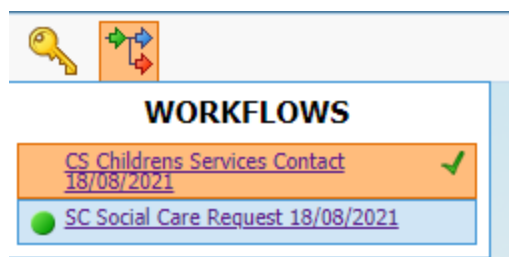
Workflow maps are a useful tool to view historic and current worksteps that have been recorded. This also allows the worker to view any outstanding work and where actions added to worksteps could lead onto. Any worksteps that have been completed will display in a flowchart.

The **Workflow map** can be viewed from within the **Person summary** screen by clicking on the **Workflow map** button that displays on the **Current work** tool bar.




The screen will refresh and will default to display the workflow map that was most recently generated.

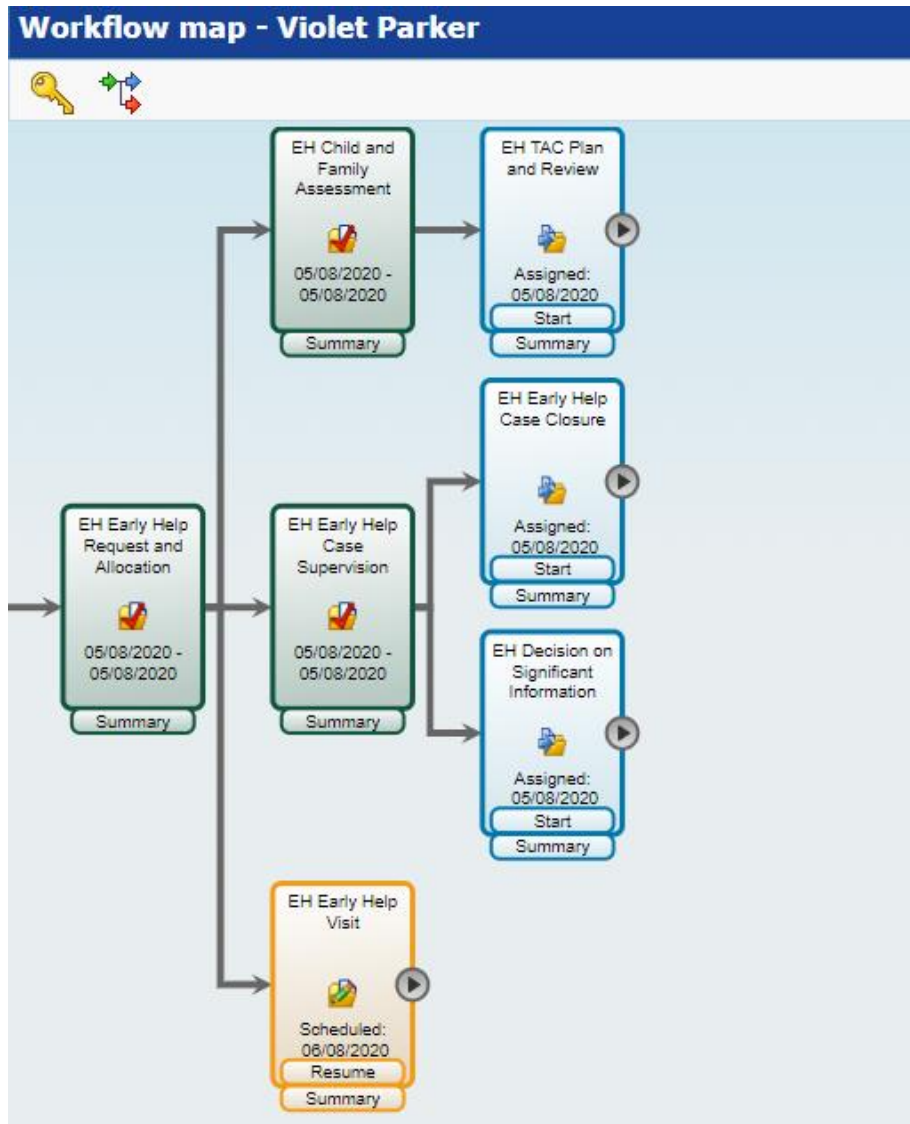
If there are several workflows in progress for the person, you can select the one you want to view by clicking on the  view workflows icon and select it from the list. The map that is currently displayed is highlighted and has a green tick icon  next to the title. Any that display the  green dot icon are open and in progress. Those with no icons are completed and closed workflows. Clicking on the  view workflows icon again will hide the list.





Before looking at the map itself, you can view a key that explains the map.

Click on the  key icon to display the key. The key explains the colour coding that is used to indicate the status of different work items on the workflow map.

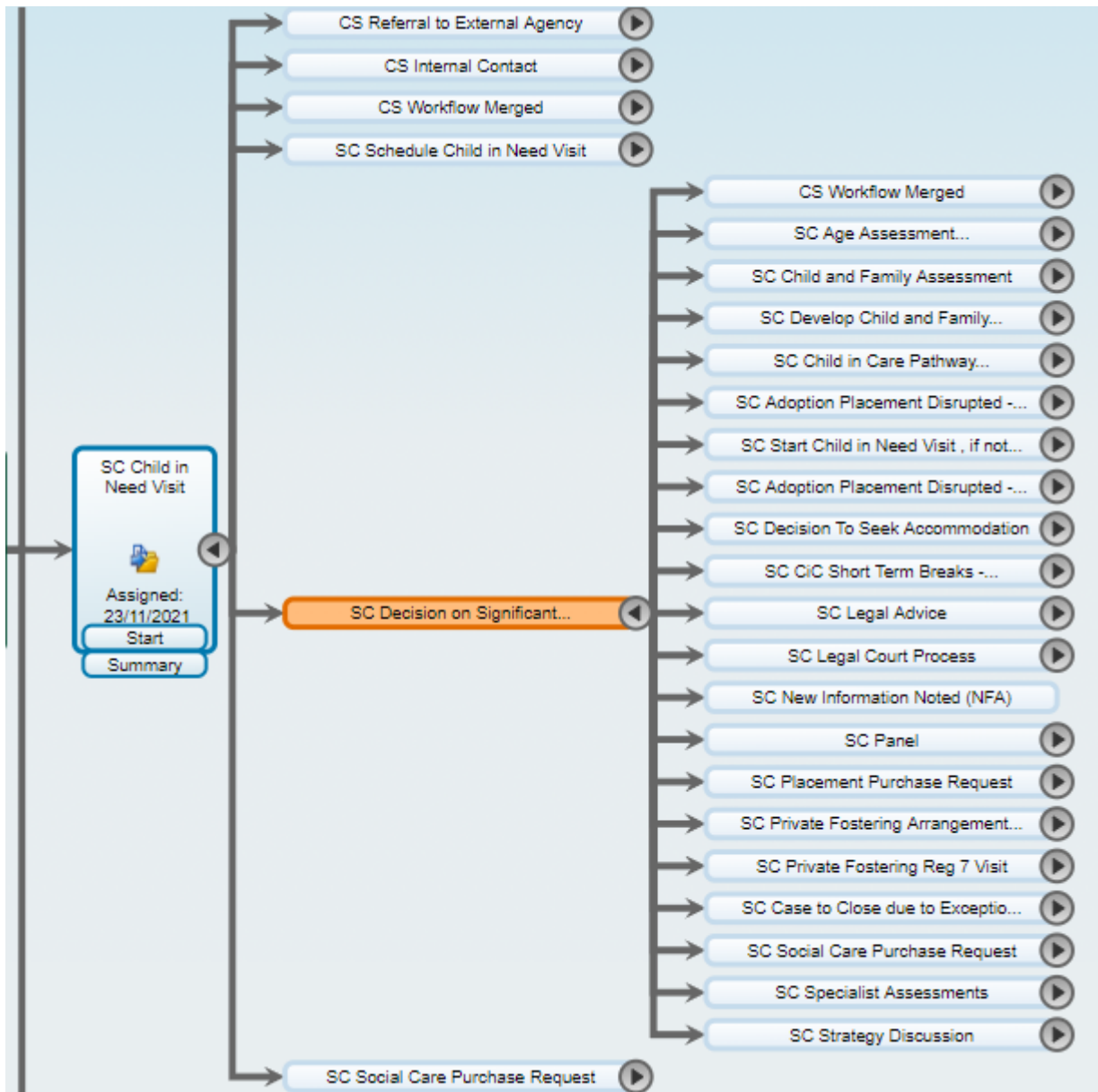
The workflow map can be dragged around the screen by clicking on it and holding down mouse button.



Each workstep has one or two 'buttons' at the bottom; the **Summary** button displays the **Workstep summary** screen. The other button's action depends on the status of the workstep and could allow you to **Resume** or **Start** the workstep. This option will only display if the workstep has been assigned to you.


The  expand and  hide icons allow you to expand and collapse the map to show next actions from the open worksteps. This allows you to view the future worksteps that can be added within a workflow without having to add them as next actions within a workstep.

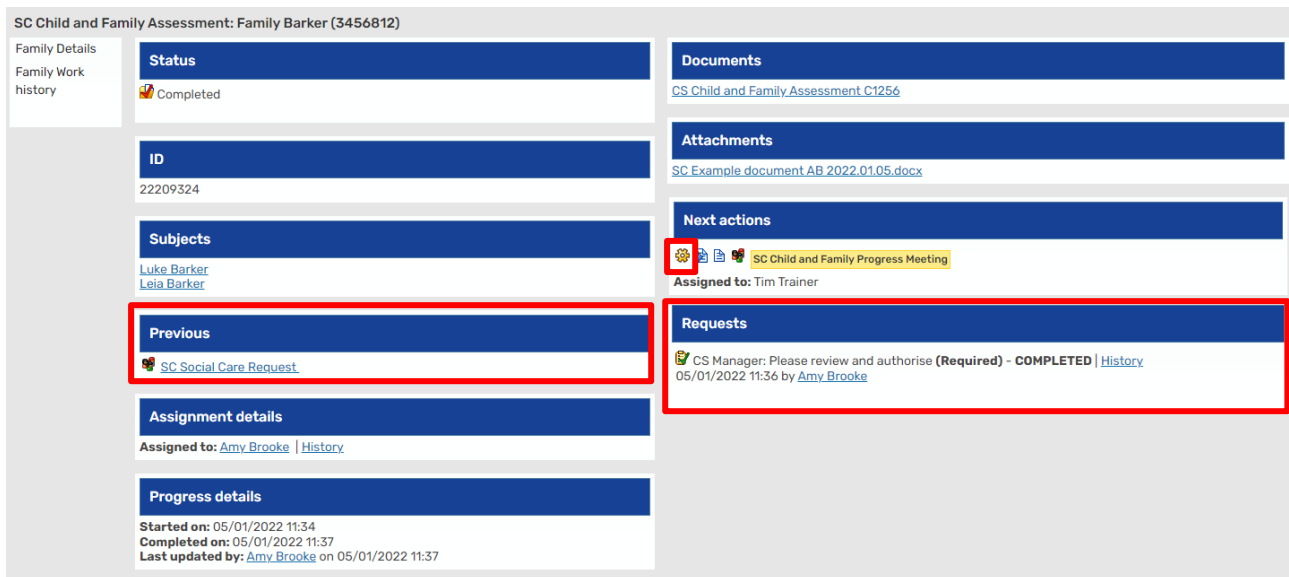
For example, below the ▶ expand icon has been clicked on the **Child in Need Visit** workstep to display the **Next actions** available. Then the ▶ expand icon has been clicked on for the **Decision on Significant Information** to show the **Next actions** available from this workstep. The **Decision on Significant Information**, for example allows you to change the direction of your record and can be used to step a case up to Child Protection. By clicking on the ▶ expand icon for the **Decision on Significant Information** you can view the Next actions available for that workstep. Using the workflow map allows you to check where the **Next actions** will lead onto before you add them to a workstep.



When clicking on **Summary** on a workstep within a workflow map, the **Workstep summary** screen will appear.

Any forms and letters that have been completed in the workstep will display as hyperlinks under **Documents**. Any documents that have been uploaded and attached to the workstep will appear under **Attachments**.


Any **Next actions** selected will display. Clicking on the  yellow cog icon will allow you to select **Summary** to view the next Workstep Summary or select **Start** or **Resume** to record into the workstep.



The **Previous** workstep displays as a hyperlink, clicking this will open the Workstep summary screen for the previous workstep

Requests will display to reflect authorisations, actions and notifications that have been sent.

Select **Person summary** or **Family Details** from the sidebar menu to exit this screen.

To exit the workflow map, click on the  close icon.