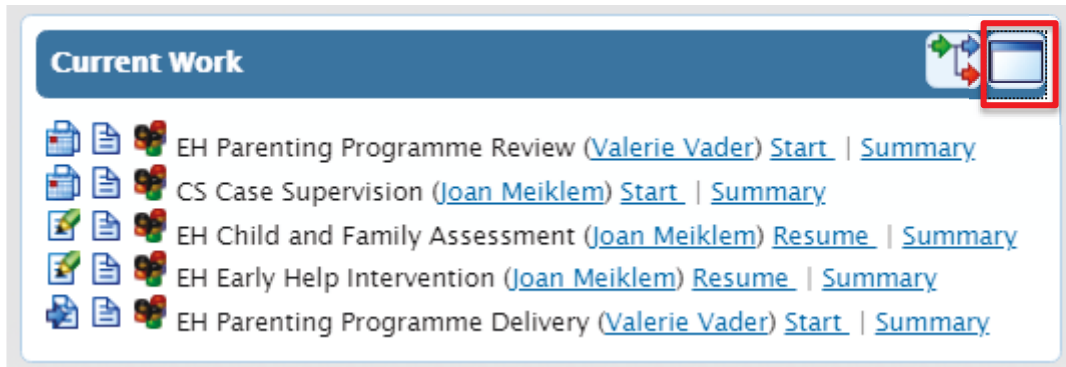


Children's Services Quick Guide


Using the Workflow History

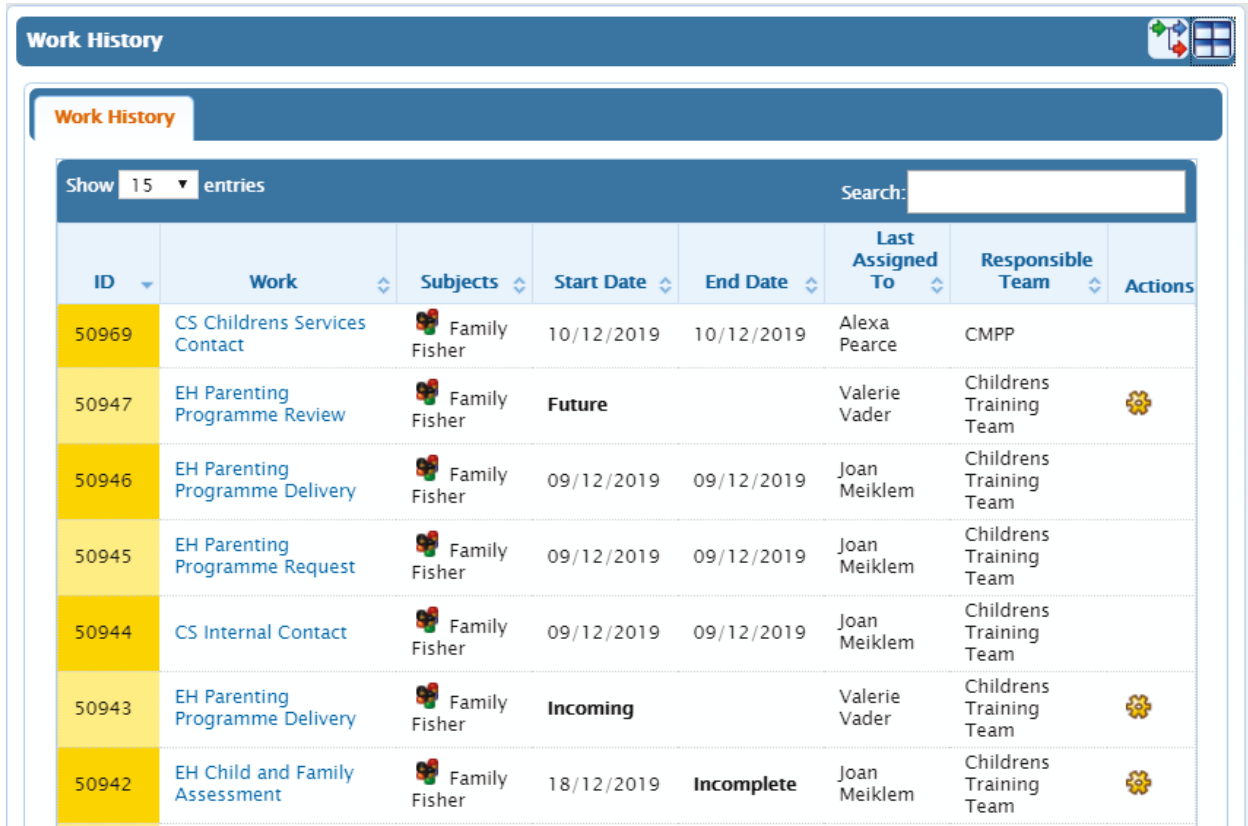
The **Workflow History** displays all worksteps that are complete, incomplete or scheduled for future completion for a person. To access the **Workflow History** for an individual, you must navigate to the **Current Work** section on their **Person Summary** screen.






Current Work

- EH Parenting Programme Review (Valerie Vader) [Start](#) | [Summary](#)
- CS Case Supervision (Joan Meiklem) [Start](#) | [Summary](#)
- EH Child and Family Assessment (Joan Meiklem) [Resume](#) | [Summary](#)
- EH Early Help Intervention (Joan Meiklem) [Resume](#) | [Summary](#)
- EH Parenting Programme Delivery (Valerie Vader) [Start](#) | [Summary](#)

Click on the  icon to display a workflow history:




ID	Work	Subjects	Start Date	End Date	Last Assigned To	Responsible Team	Actions
50969	CS Childrens Services Contact	Family Fisher	10/12/2019	10/12/2019	Alexa Pearce	CMPP	
50947	EH Parenting Programme Review	Family Fisher	Future		Valerie Vader	Childrens Training Team	
50946	EH Parenting Programme Delivery	Family Fisher	09/12/2019	09/12/2019	Joan Meiklem	Childrens Training Team	
50945	EH Parenting Programme Request	Family Fisher	09/12/2019	09/12/2019	Joan Meiklem	Childrens Training Team	
50944	CS Internal Contact	Family Fisher	09/12/2019	09/12/2019	Joan Meiklem	Childrens Training Team	
50943	EH Parenting Programme Delivery	Family Fisher	Incoming		Valerie Vader	Childrens Training Team	
50942	EH Child and Family Assessment	Family Fisher	18/12/2019	Incomplete	Joan Meiklem	Childrens Training Team	

The list of workflow steps will display as blue hyperlinks. If the workstep has been completed it will have a start and end date recorded. Others will display as **Incoming**, **Future**, or if they have been started will display as **Incomplete** with a start date.

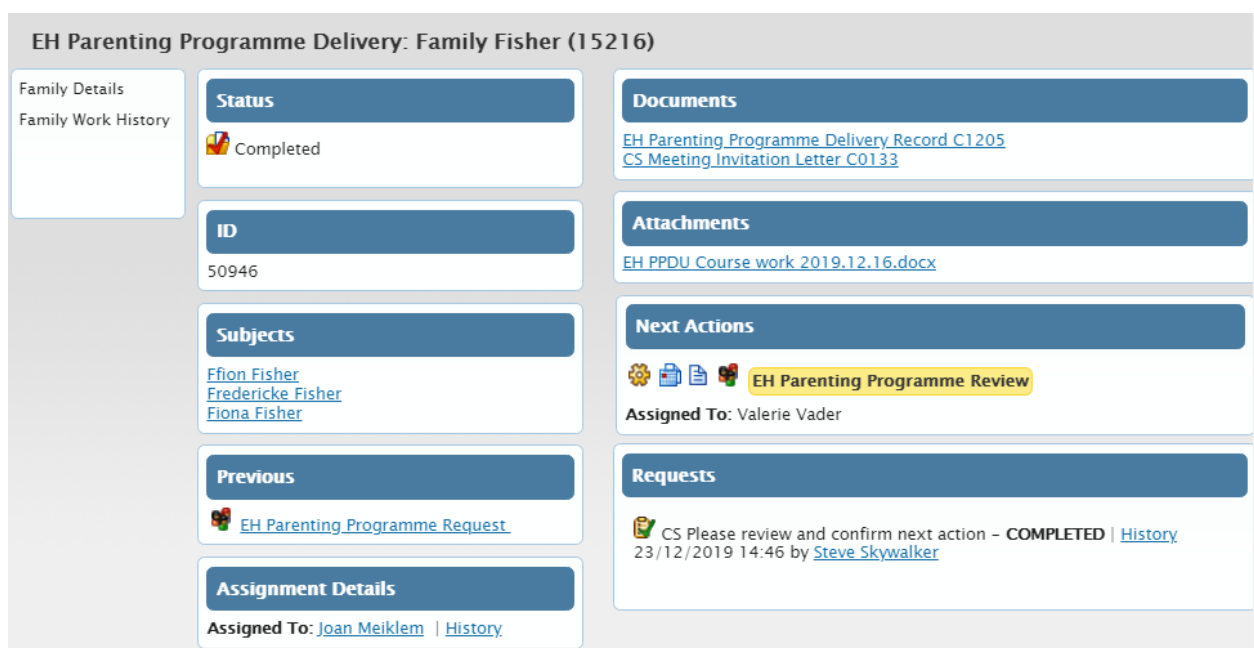
The page will default to display 15 records per screen. This can be amended using the options available in the **Show Entries** field in the top left corner of the screen.

The **Search** field can be used to filter the results by entering text or a specific date.

When an  icon appears on the **Work History** screen, clicking on this will give the user the option to **Start** this piece of work if the workstep has been assigned to them.

Clicking on any of the hyperlinks will open a **Workstep Summary** screen which will display all the documents that have been completed as part of that Workstep.


In the example below, the **EH Parenting Programme Delivery** has been selected.



The screenshot shows a user interface for a workstep titled "EH Parenting Programme Delivery: Family Fisher (15216)". On the left, there is a sidebar with "Family Details" and "Family Work History". The main content area is organized into several panels:

- Status:** Shows "Completed" with a checkmark icon.
- ID:** Displays the number "50946".
- Subjects:** Lists three names: "Ffion Fisher", "Fredericke Fisher", and "Fiona Fisher".
- Previous:** Contains a link "EH Parenting Programme Request" with a gear icon.
- Assignment Details:** Shows "Assigned To: Joan Meiklem" with a "History" link.
- Documents:** Lists two document links: "EH Parenting Programme Delivery Record C1205" and "CS Meeting Invitation Letter C0133".
- Attachments:** Shows one attachment: "EH PPDU Course work 2019.12.16.docx".
- Next Actions:** Features a highlighted "EH Parenting Programme Review" button with a gear icon, and "Assigned To: Valerie Vader".
- Requests:** Displays a request: "CS Please review and confirm next action - COMPLETED | History" with a timestamp "23/12/2019 14:46" and the user "Steve Skywalker".

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**.

Within the **Next Actions** section, clicking on the  icon will allow you to select **Summary** to view the next Workstep Summary or select **Start** or **Resume** to record into the workstep if it has been assigned to you.

The **Previous** workstep also displays as a hyperlink. Clicking on this will open the Workstep Summary screen for the workstep that came before this one.

Requests will display to reflect authorisations, actions and notifications that have been sent from within the workstep.

The menu on the left contains options to click on **Person Summary**, **Family Details** or **Carer Details** which will navigate the user back to the **Person Summary**, **Family Details** or **Carer Details** screen, or **Work History** which will return the user to the **Work History** screen.

Clicking on the  will return the user to the **Person Summary** or if in a group record, the **Family or Carer Details** screen.