



Using ILP Workflows

ILP Workflows allows the school to establish a sequence of activities or steps to apply to every ILP throughout the year and track the completion of each step for each ILP.

ILP Workflows - 2022 Kindergarten													
Workflow Item	Started Due	Started	Started Date	Started By	Completed Due	Completed	Completed Date	Completed By	Approved Due	Approved	Approved Date	Approved By	Edit
Plan Hatched	03/01/2022	<input checked="" type="checkbox"/>	11/01/2022	School Admin	14/01/2022	<input checked="" type="checkbox"/>	11/01/2022	School Admin	24/01/2022	<input checked="" type="checkbox"/>	15/01/2022	School Admin	
First Review	01/03/2022	<input type="checkbox"/>			14/03/2022	<input type="checkbox"/>			18/03/2022	<input type="checkbox"/>			
Final Review	31/10/2022	<input type="checkbox"/>			14/11/2022	<input type="checkbox"/>			28/11/2022	<input type="checkbox"/>			

Schools build their own workflow items and workflow sequence. These are applied by the system to each ILP when a new ILP is created. Users cannot add or remove workflow steps - they are owned and imposed by the school.

Examples of possible workflow steps:

- Analysis and Initial Collaboration
- Initial ILP in entered
- Mid-year Adjustment Review
- Term 2 Case Meeting
- Evaluation, report and recommendations

Edit Lists

Table List

[Add new record](#)

Show entries Search:

ILP_WORKFLOW_ITEM_ID	ILP_WORKFLOW_ITEM	DESCRIPTION	SORT_ORDER	
74	Plan Hatched	Plan Hatched	1	
75	First Review	Review with key stakeholders	2	
76	Final Review	Includes evaluation and recommendations	3	
77	Evaluation and Recommendations	Finalisation of ILP in preparation for next year	4	

Setup hints: using Edit Lists, create workflow items that will apply to all ILPs. Include a sort order to reflect the sequence of activity.

Due Dates

ILP Workflows operate on due dates. Dates can be applied to **individual** ILPs - each student ILP can have different due dates for the workflow items.

To enter individual Workflow Due Dates, go to the student's ILP, edit the Workflow item (edit button on right) and enter the due dates required. SAVE.

ILP Workflow - 2022 Kindergarten			
Workflow Item	Plan Hatched		
Due Dates	STARTED	03/01/2022	
	COMPLETED	14/01/2022	
	APPROVED	24/01/2022	

Set Workflow Dates: bulk updating all workflow item due dates for all current ILPs

Commonly, schools will want to set the **same due dates** for each workflow item across ALL ILPs in place for the new year. The Set Workflow Dates tool found within the ILP Register allows users to apply a single set of due dates for all ILPs in place within the current Academic Year.

Create the ILPs you need. ILPs do not have to be complete at this point, they just need to exist before executing the Set Workflow Dates tool. (Note that ILPs added AFTER the tool has been run will not get the bulk dates. These will need to be added manually for the "late" ILPs.)

Go to ILP Register. Click "Set Workflow Dates". See "ILP Register" section to find the ILP Register.

Set all ILP Workflow Due Dates

Ensure all required ILPs have been created **BEFORE** using this tool.
ILPs created after executing this tool will **NOT** contain these due dates.

Set due dates for all ILPs in Academic Year

2022



Plan Hatched



First Review



Final Review



Evaluation and Recommendations



Final Report submitted



This action **CANNOT** be undone.

SUBMIT

CANCEL

The Workflow items defined by you in Edit Lists will appear as sections. Expand the items to add the due dates you require.

Set all ILP Workflow Due Dates

Ensure all required ILPs have been created **BEFORE** using this tool.
ILPs created after executing this tool will **NOT** contain these due dates.

Set due dates for all ILPs in Academic Year 2022 

Plan Hatched

First Review

STARTED 24/01/2022 

COMPLETED 20/02/2022 

APPROVED 28/02/2022 

Final Review

Evaluation and Recommendations

NOTE: Wherever you enter a due date, the updater will overwrite any existing value in any ILP for the year selected. If you leave a value blank in the tool, any value existing in any ILP will not be affected.

When you have added all due dates you require, scroll down and click **SUBMIT**.

APPROVED
28/02/2022

Final Review
▼

Evaluation and Recommendations
▼

Final Report submitted
▼

This action **CANNOT** be undone.

SUBMIT
CANCEL

Workflow Statuses

There are 3 possible workflow statuses built in to each workflow item:

- **STARTED** - the workflow item has been commenced
- **COMPLETED** - the workflow item has been completed
- **APPROVED** - the workflow item has been approved/verified/checked etc.

Schools do not need to use all of the statuses. For example, a school may choose not to use STARTED, preferring only to require recording of COMPLETED and APPROVED dates only. Or, STARTED and APPROVED may not be required - only COMPLETED dates are set, and only COMPLETED dates are entered.

Fill in due dates for the statuses you want to use.

Editing Workflows

Workflow statuses can be simply clicked on the Workflow Summary grid, without needing to open each workflow item's Detail screen.

ILP Workflows - 2022 Kindergarten													
Workflow Item	Started Due	Started	Started Date	Started By	Completed Due	Completed	Completed Date	Completed By	Approved Due	Approved	Approved Date	Approved By	Edit
Plan Hatched	03/01/2022	<input type="checkbox"/>		School Admin	14/01/2022	<input checked="" type="checkbox"/>	11/01/2022		24/01/2022	<input checked="" type="checkbox"/>	15/01/2022	School Admin	
First Review	01/03/2022	<input type="checkbox"/>			14/03/2022	<input type="checkbox"/>			18/03/2022	<input type="checkbox"/>			
Final Review	31/10/2022	<input type="checkbox"/>			14/11/2022	<input type="checkbox"/>			28/11/2022	<input type="checkbox"/>			

Simple click the checkbox

Rows per page: All 1-3 of 3 < >

Note that if you have "completed" or "approved" entered, then click "started", the completed and approved records are removed (so you can start the workflow again). When changing a Workflow status value using the checkboxes in the Workflow Summary Grid, the change will be saved automatically - there's no SAVE button to push.

A workflow item record will need to be opened if the user wants to enter/adjust individual due dates or add notes and/or attachments to a workflow item.

 **Individual Learning Plan:** Bob Marley
649

ILP Workflow - 2022 Kindergarten

Workflow Item	Plan Hatched	
Due Dates	STARTED	03/01/2022 
	COMPLETED	14/01/2022 
	APPROVED	24/01/2022 

Current Status

- Started **11/01/2022 School Admin**
- Completed **11/01/2022 School Admin**
- Approved **15/01/2022 School Admin**

Status change will be recorded with current date and user

Note

15/01/2022 School Admin Plan finalised on 11 

ADD WORKFLOW NOTE 

Attachment

15/01/2022 School Admin individual_learning_ 

ADD WORKFLOW ATTACHMENT 

To open a workflow, click the Edit icon on the far right column of the ILP Workflow Summary Grid on the overview screen.

(Because ILP Workflows are automatically created for each ILP and cannot be removed, there is no NEW WORKFLOW button or DELETE button for Workflows.)

ILP Workflows - 2022 Kindergarten													
Workflow Item	Started Due	Started	Started Date	Started By	Completed Due	Completed	Completed Date	Completed By	Approved Due	Approved	Approved Date	Approved By	Edit
Plan Hatched	03/01/2022	<input checked="" type="checkbox"/>	11/01/2022	School Admin	14/01/2022	<input checked="" type="checkbox"/>	11/01/2022	School Admin	24/01/2022	<input checked="" type="checkbox"/>	15/01/2022	School Admin	
First Review	01/03/2022	<input type="checkbox"/>			14/03/2022	<input type="checkbox"/>			18/03/2022	<input type="checkbox"/>			
Final Review	31/10/2022	<input type="checkbox"/>			14/11/2022	<input type="checkbox"/>			28/11/2022	<input type="checkbox"/>			

Saving Workflow records

After adding or making changes to a Workflow record in the Workflow Details screen the SAVE button in the top right of the Workflow Details screen will go **ORANGE**, indicating that there is a need to save. Click the orange SAVE button and it will turn **GREEN**, indicating that changes have been saved.

←
Individual Learning Plan: Bob Marley
649

NEW ILP RECORD

SAVE

ILP Workflow - 2022 Kindergarten

Workflow Item **Plan Hatched**

Due Dates

STARTED	03/01/2022	
COMPLETED	14/01/2022	
APPROVED	24/01/2022	

Current Status

Started School Admin
 Completed 11/01/2022
 Approved 15/01/2022 School Admin

Status change will be recorded with current date and user

Return to Overview screen from Detail screens

When you click SAVE on any of the details screens, the view will refresh back to the ILP Overview screen automatically.

If you are browsing a Details screen (no saving) and want to return to the ILP Overview screen, click the ORANGE BACK ARROW at the top left of the Details screen.

marley | Contact | [Search Icon]

School Admin | [Help Icon] | [Calendar Icon] | [Add Icon]

Individual Learning Plan: Bob Marley 649

NEW ILP RECORD | SAVE

© 2021 Edumate