


Adults Quick Guide

Managing Individual Workflow

This guide describes how you can manage your **individual** work using the **Full workview - Allocations, Recently viewed** and **Current work** sections.

Refer to the **Managing Team Workflow** user guide for details about the **Team workview**

Full workview

The **Full workview** can be accessed at any time by clicking the **Show full workview** icon  (this icon is 'greyed out' when you are in **Full Workview** )

The **Full workview** allows you to organise your work in various ways to work efficiently in your role.

This screen is split into three sections: **Allocations, Recently viewed** and **Current work**.

- Each section displays within the **Full** and **Narrow workviews**. However, the **Full workview** allows for greater functionality.
- Each section can be opened (expanded) or closed (collapsed) by clicking on it.
- If you open a section it will remain open until you close it again or open a different section.
- Only one section can be open at once – opening a section will automatically close the other two sections.
- All three sections can be closed at the same time.

Mosaic will retain your selection as to which section of the **Full workview** screen is open when you sign into the system.

For example, if you open the **Allocations** sections, in your **Individual workview**, and then sign out, the **Allocations** section will be open when you next sign in.


Mosaic will also retain any organisation settings applied i.e. if you rearrange your **Current work** by '**Date**' it will remain arranged by '**Date**' until you change the setting.

Mosaic will also retain these selections throughout your sign in session – the section you have opened will be open until you close it, or open a different section and the work/information will be organised as per your chosen setting.

Please refer to the **Full Workview** user guide for further details about this screen

Allocations

The **Allocations** section displays a list of cases (people) which you have an open **Worker relationship** recorded on their record.

- The number displayed in brackets next to **Allocations** denotes the total number of people listed in that section – your caseload.
- Clicking on the **person's name** will open the **Person summary** for that person (Mosaic will automatically display as **Narrow workview**).
- The **first number** in brackets against each person is their **Mosaic ID number**.
- The **second number** in brackets against each person tells us **how many workflow steps** are currently on their record (incoming, incomplete and future work).
- Clicking on the **yellow folder icon**  to the left of each person will display what workflow is currently on the record and who it is assigned to.

You will see your own work and work which is assigned to other teams and workers in Mosaic.

From within the yellow folder –


- Clicking on the **Title** hyperlink will open the **Workflow Step Summary** screen for that workflow step.

You can then click **Start** or **Resume** in the sidebar menu to open the workflow step (if assigned to you, a member of your team or your team).

See the **Workflow Step Summary** user guide for further details.

- Clicking the **worker/team inbox/team name** hyperlink in the **Assigned to** column will display information about the team, team inbox or worker the workflow step is assigned to.
- The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent.
- The **Date** column displays the date the task was sent / is scheduled for.
- The **Note** column displays notes added to the workflow step when assigned to the worker, team inbox or team.

If the note is longer than the text visible on the screen click the text to open it in a separate popup window to view the full note.

- If you hover the cursor over a **work** icon it changes to a **yellow cog**  and displays a dialogue box describing what the workflow step is:

Left click this icon to see a list of actions you can take, which will vary according to your role and the type of work you are looking at:

- You can start/resume any work, assigned to you, a member of your team, or your team by selecting '**Start work/Resume work**' from the mini menu.
- You can re-assign work, assigned you, a member of your team, or your team, by selecting '**Update assignment**' from the mini menu.

Refer to the **Assigning Work** user guide for full details.

- You can view the assignment details of any of the workflow steps by selecting '**Assignment history**' from the mini menu.

This shows you who assigned the work, where and when.

- You can click the **Add to calendar** option to add an appointment in your outlook calendar based on the scheduled date of the work
- Depending on your system permissions, you may also be able to cancel **Incoming** and **Future work** by selecting '**Cancel work**' from the mini menu.
- You will have to record a reason and for audit purposes it would be visible on the record that the work had been added and then cancelled.


The **Bulk Assign** button located in the **Allocations** section allows for one or multiple allocations (open worker relationship) to be reallocated to another worker.

This will only 'reallocate' the current open worker relationship from one worker to another; it will not reassign any workflow steps.

Recently viewed

The **Recently viewed** section lists up to the last fifteen records that you have accessed, with the most recent listed at the top.

Recently viewed has the same functionality as the **Allocations** section.

- Clicking on the **person's name** will open the **Person summary** for that person (Mosaic will automatically display as **Narrow workview**).
- The **first number** in brackets against each person is their **Mosaic ID number**.
- The **second number** in brackets against each person tells us **how many workflow steps** are currently on their record (incoming, incomplete and future work).
- Clicking on the **yellow folder** icon  to the left of each person will display what workflow is currently on the record and who it is assigned to.

You will see your own work and work which is assigned to other teams and workers in Mosaic.

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If the note is longer than the text visible on the screen click the text to open it in a separate popup window to view the full note.

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Refer to the **Assigning Work** user guide for full details.

- You can view the assignment details of any of the workflow steps by selecting '**Assignment history**' from the mini menu.

This shows you who assigned the work, where and when.

- You can click the **Add to calendar** option to add an appointment in your outlook calendar based on the scheduled date of the work
- Depending on your system permissions, you may also be able to cancel **Incoming** and **Future work** by selecting '**Cancel work**' from the mini menu.

You will have to record a reason and for audit purposes it would be visible on the record that the work had been added and then cancelled.

You will see the **Restricted** icon , rather than the **yellow folder**, against a restricted (confidential) record if you have tried to access one you do not have permission to access.

Current work

The **Current work** section is split into folders, you will only see a folder if you currently have at least one item of that work type assigned to you.

Unless you have rearranged your **Current work** using one of the column headings (See [Organising your work](#)), the default display for the **Current work** section is to be organised by 'Type' (type of work/task). Work in each folder is displayed by default in ascending order by date.

Potential available work folders (when arranged by 'Type') are:

- **Incoming work** = Workflow step assigned but not yet started
- **Incoming requests** = Contains both requests and notifications.

Requests = tasks such as providing additional information or reviewing and authorising workflow steps.

These must be completed before a workflow step can be finished

Notifications = usually sent purely for information only.

They may also instruct you to do a task which does not require a response, e.g. asking Business Support / Admin to print and post documentation to the person / their representative.

These can be acknowledged after the workflow step is already finished, or completed as per requests if the workflow step they have been sent from has not been finished.

- **Incomplete work** = Workflow steps that have been started but not finished

Work highlighted in **yellow** indicates a request has been sent and you are waiting for a response (for the request to be completed).

Work highlighted in **red** has been returned (request rejected) and therefore needs amending. In this scenario the request would usually need to be re-sent.

- **Future work** = Workflow steps assigned and due to start in the future (scheduled workflow) i.e. Reviews

- **Alerts** = Sent from a case note to let you know there is a case note to read.

There are no automatic alerts, so the alert will have been manually sent to you, by the worker recording the case note

As with the **Allocations** and **Recently viewed** sections:

- Clicking on the **person's name** will open the **Person summary** for that person. (Mosaic will automatically display as **Narrow workview**).
- Clicking on the **Title** hyperlink will open the **Workflow Step Summary** screen for that workflow step.

You can then click **Start** or **Resume** in the sidebar menu to open the workflow step (if assigned to you, a member of your team or your team).

See the **Workflow Step Summary** user guide for further details.

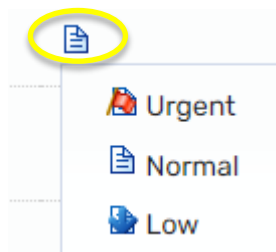
- The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent.

You can click the Priority column heading to sort by priority.

If required, you can also change the **Priority** of the work within the **Current work** section.


To change the priority:

- Left click on the **Priority** icon - a mini menu will display



- Click on the relevant icon to select the new priority required
- The **Date** column displays the date the task was sent / is scheduled for. You can click the Date column heading to sort by date.
- The **Note** column displays notes added to the workflow step when assigned to the worker, team inbox or team.

If the note is longer than the text visible on the screen click the text to open it in a separate popup window to view the full note.

- If you hover the cursor over a **work** icon it changes to a **yellow cog**  and displays a dialogue box describing what the workflow step is:

Left click this icon to see a list of actions you can take, which will vary according to your role and the type of work you are looking at:

- You can start/resume any work, assigned to you, a member of your team, or your team by selecting '**Start work/Resume work**' from the mini menu.
- You can re-assign work, assigned you, a member of your team, or your team, by selecting '**Update assignment**' from the mini menu.

Refer to the **Assigning Work** user guide for full details.

- You can view the assignment details of any of the workflow steps by selecting '**Assignment history**' from the mini menu.

This shows you who assigned the work, where and when.

- You can click the **Add to calendar** option to add an appointment in your outlook calendar based on the scheduled date of the work

- Depending on your system permissions, you may also be able to cancel **Incoming** and **Future work** by selecting '**Cancel work**' from the mini menu.

You will have to record a reason and for audit purposes it would be visible on the record that the work had been added and then cancelled.

There is a **Bulk Assign** button located on the **Current work** section.

This button allows one or multiple items of work (workflow steps, requests, alerts etc) to be reassigned to another worker, team inbox or team.

This will only reassign the selected work items; it will not reallocate the case (update the worker relationship).

Refer to the **Assigning Work** user guide for full details.


Organising your Work

The default setting for each section; **Allocations**, **Recently viewed** and **Current work**, is by 'Type' (this setting is only visible when you open a **yellow folder** in the **Allocations** and **Recently viewed** sections)

Each section can be organised using any of the column headings (Type, Subject, Title, Status / Assigned to, Priority and Date) by clicking on the column heading to rearrange the information.

Clicking once will arrange by A-Z or New-Old; clicking twice will arrange by Z-A or Old-New.

Mosaic will retain your organisation within each section (each section can be organised differently) until you choose to change it. This includes when you sign out of the system – your choice will be retained when you next sign in.

Clicking the **Refresh pane** icon  will ensure the latest information is displayed within each section. It is recommend this is used if you have been signed in and not using the system for a while, i.e. if it has been sat idle.

Managing your Work

Workflow Steps

Workflow steps (**Incoming work**, **Incomplete work** and **Future work**) should be completed correctly and in a timely manner.

Requests

Requests (**Incoming requests**) should be completed or returned as soon as possible, as the workflow step they have been sent from cannot be finished until the request is complete.

For details on how to complete a request please refer to the **Completing or Returning Requests** user guide

Notifications

Notifications (**Incoming requests**) should be acknowledged once the workflow step they have been sent from has been finished (it cannot be acknowledged before the step is finished).

To clear (complete) a notification before the step is finished you will need to treat it as a request.

For details on how to acknowledge a notification please refer to the **Acknowledging Notifications** user guide

Alerts

Alerts should be acknowledged to remove them from your Alerts folder.

They are purely for your information so will not affect others if they are not acknowledged, however we recommend acknowledging them as soon as appropriate.




For details on how to acknowledge an alert please refer to the **Acknowledging a Case Note Alert** user guide







Work Icons


A number of **icons** are used in the **Full workview** to represent different types of work and you will be able to do different things with each.

Please note: Remember the options you see are dependent on your role and system permissions, along with the type of work and who the work is assigned to, so you may not have all the options listed available to you.

Work will have one of the following icons:

Icon	Type of Work	Options for Work icon
	Alert	No options appear – instead you must click the Title hyperlink to action
	Future work	Start work Update assignment Assignment history Add to calendar Cancel work
	Incoming work	Start work Update assignment Assignment history Add to calendar Cancel work

Icon	Type of Work	Options for Work icon
	Incomplete work	Resume work Update assignment Assignment history Add to calendar
	Incoming notification	Assign Add to calendar
	Incoming request	Resume work Assign Add to calendar
	Incomplete work, where requests have been sent – highlighted in yellow	Resume work Update assignment Assignment history Add to calendar
	Incomplete work, where requests have been sent and some, but not all, have replies	Resume work Update assignment Assignment history Add to calendar
	Incomplete work, where a request has been returned - highlighted in red	Resume work Update assignment Assignment history Add to calendar

Icon	Type of Work	Options for Work icon
	Incomplete work, where all sent requests have been completed	Resume work Update assignment Assignment history Add to calendar


Checking Assignment History (Details)

Click on a step **name** within the **Title** column (within the **Allocations**, **Recently viewed** or **Current work** sections) to view the **Workflow Step Summary** screen.

The **Assignment details** on the **Workflow Step Summary** screen shows the last person the workflow step was/is currently assigned to.

Clicking **History** allows you to view a list of all assignment details if the work has been reassigned at all. This shows you who assigned the work along with the date and time they did it.

See the **Workflow Step Summary** user guide for further details.

This information can also be accessed by left clicking the **work** icon (which changes to a **yellow cog**  when you hover over it) within your/the team's **Current work**, **Allocations** or **Recently viewed** sections in **Full workview** and selecting **Assignment history** from the mini menu.