


Adults Quick Guide

Managing Team Workflow


This guide is intended for workers who have the sufficient permissions to access the **Team workview**.

Only those with permission to access it, will see the **Show team workview** icon 

The guide will cover the functionality of the **Team workview** and how you can manage your team work in Mosaic.

For information about your **Individual workview** refer to the **Managing Individual Workflow** user guide.

Accessing the Team workview

The **Team workview** is accessed by clicking the **Show team workview** icon  available in **Full** or **Narrow workview**.



Please note: It is usually easier to access and use the **Team workview** when in **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** )

Mosaic will retain your selection as to which section of the **Full workview** screen is open when you sign into the system – this will be visible in the narrow section down the left of the screen when in **Narrow workview**.

For example, if you were in the **Team workview** with the **Current work** section open and then sign out, the **Current Work** section, within the **Team workview**, will be open when you next sign in.

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

The **Show team workview** icon  changes to the **Show individual workview** icon  when you have accessed the Team workview.

At the top of the **Team workview** screen you will see the name of the team you are a member of.

Team Name button

Clicking the **team name** button gives the options to view work for the team (default setting), view a list of team members (including team inboxes), view sub-teams and view a list of sub-team members (if your team has any sub-teams).

- Clicking on **Team members** displays a list of workers who are a member of the team and clicking on a worker name then displays that worker's workview.

You can view the worker's **Allocations** and **Current work** sections.

Where relevant any inboxes for your team will also show within the Team members list.

- Clicking on a **sub-team** will display an option to view the team members of that sub-team.

You can click on a sub-team just like clicking on a team member to view their **Allocations** and **Current work** sections.

You can also choose to view the **Team workview** for the sub-team by clicking the sub-team name.

- Clicking the team's name on the **Team name** button, again, will refresh the screen back to the **Team workview**, if you have viewed a team member, sub-team member or sub-team's workview.

Sections on the Team Workview

The **Team workview** is split into two sections: **Team summary** and **Current work**.

Remember, Mosaic will retain your selection as to which section is open when you access the Team workview.

- 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 section, but both sections can be closed at the same time.

Team summary

- The **Team summary** displays as a table.

The number displayed in brackets next to **Team summary** denotes the total number of rows in the table.

- The **top row** of the table displays the **allocations** and **workload** for the **team**.
- The **subsequent rows** display the **allocations** and **workloads** for **each member** of the team, any **team inboxes** and any **sub-teams**.
- The information displayed tells us how many **Allocations** each worker has (the number of open worker relationships) and the **Workload** assigned to each worker/inbox/team – how many **Incomplete work**, **Incoming work** and **Future work** steps.
- Clicking on a **worker/inbox name** hyperlink will show the **Individual workview** for that worker (similar to clicking on their name in the **Team name button > team member's** list).

From here you can then view their **Allocations** section (relevant to workers only) and their **Current work** section to see the work that is assigned to them (relevant to workers and inboxes).

- Clicking on a **sub-team name** hyperlink will show the **Team summary** for the sub-team.

You can then click a sub-team member's **name** hyperlink to show the **Individual workview** for that worker (same as clicking on their name in the **Team name button > sub-team member's** list).

Current work for the Team

The **Current work** section is found underneath the **Team summary** and contains the work assigned to the team.

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

Unless you have rearranged your **Current work** using one of the column headings (See [Organising Current 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 for the team (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.

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

Please note: Alerts and Incomplete work are not available to be assigned to the team so these folders will never be visible in the **Team workview**.

- 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** to open the workflow step (without assigning it first) although you will need to click 'yes' in the popup window.

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

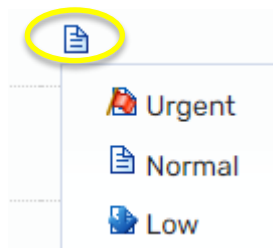
- The **Priority** column displays the urgency of the task; a red flag denotes that the task is urgent.

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

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



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:
- If you left click the **yellow cog**  you will 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 by selecting '**Start work/Resume work**' from the mini menu.
 - You can re-assign work 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 Current work

The default setting for **Current work** is by 'Type' but it can be organised using any of the column headings (Type, Subject, Title, 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 selection 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. It is recommended this is used if you have been signed in and not using the system for while, i.e. if it has been sat idle.

Managing the Team Work

Workflow Steps

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

These workflow steps should be assigned to an individual or started directly from the **Team workview**. Mosaic will automatically assign steps to any individual that starts them once they first click save.

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.

The requests can be completed by workers acting on behalf of the team, or the requests can be assigned.

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.

The notifications can be completed by workers acting on behalf of the team, or the notifications can be assigned.


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




Work Icons

A number of **icons** are used in the **Team 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, 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
	Future work	Start work Update assignment Assignment history Add to calendar Cancel work

Icon	Type of Work	Options
	Incoming work	<ul style="list-style-type: none"> Start work Update assignment Assignment history Add to calendar Cancel work
	Incoming notification	<ul style="list-style-type: none"> Assign Add to calendar
	Incoming request	<ul style="list-style-type: none"> Resume work Assign Add to calendar

Assigning Work

Work can be assigned from the team's **Current work** to another team, a worker or team inbox, as required.

The team inboxes allow for team work to be 'filed' while waiting for allocation (reassignment) to an individual team member.

This means work can be assigned to one of the inboxes rather than all work sitting in the team's **Incoming work** folder.

Work will then be assigned to a worker when there is the capacity to do so, or workers can work on behalf of the inbox and pick work up depending on how the team organise their work.

Please refer to the **Team Inboxes** user guide for further information.

Work can be assigned individually or work can be assigned in bulk (multiple items at once).

It is likely to be the role of the manager to assign work but depending on local arrangements, any worker with sufficient system permissions, will be able to assign work as required.

Please refer to the **Assigning Work** user guide for full details on how to assign work.

Checking Assignment History (Details)


Click on a step **name** within the **Title** column 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 **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.