# Adults Quick Guide

# Documents Section

The **Documents** section is where all internal Mosaic forms and letter templates are stored. It is also where any external documents that have been uploaded and attached to the person's record can be found.

Mosaic will automatically save the documents (forms and letter templates) here once you start a workflow step and save it for the first time. These documents will continue to update until the final finished version is stored.

The **Step status** column will indicate whether the workflow step the document is being completed within is already finished (Completed) or whether it is still being updated i.e. it has just been started and saved (Incomplete)

Unlike the **Workflow map** and **Work history** section, the **Documents** section does not include Incoming or Future work, as they have not yet been started and saved.

Please refer to the **Workflow Map** and **Work History** user guides for more details.

## Accessing the Documents Section

The **Documents** section (**Filed documents** screen) is accessed by clicking **Documents** in the sidebar menu of the person's record.

The **Filed documents** screen will open within the main Mosaic window.

This screen is spilt into two tabs – **Forms and letters** and **Attachments**.

The **Forms and letters** tab be open when you first enter the **Filed documents** screen.

Each tab displays the documents within a table.

Any restricted documents within either tab will not be visible in the table, but a warning message will display above the table advising of restricted documents.

Documents are usually restricted based on system permissions and your role.

If there is a need to access the restricted documents you will need to contact the Mosaic Service Desk (manager's permission will be required).

## Forms and letters tab

The **Forms and letters** tab is where you will find all internal Mosaic documents (both those completed within and outside of workflow).

Unlike the **Workflow map** and **Work history** screens the **Forms and letters** tab does show all optional forms and letters templates recorded during the completion of workflow steps.

It also shows any forms opened in the **Documents** section itself via the **Create** button.

**Documents** are displayed by the form name, rather than the workflow step title, within this tab. For example, this means both **Adult Contact (New Case)** and **Adult Contact (Open Case)** are displayed as **Adult Contact**, as both workflow steps contain the same form.

The **Workflow Step Summary screen** (of the workflow step the form or letter template was completed in) is available by clicking the **Step summary** icon  in the **Actions** column.

Please see the **Workflow Step Summary** user guide for further details.

Forms opened within the **Documents** section itself (via the **Create** button) will save with an **Edit Pencil** icon  in the **Actions** column until they are finished. Once finished the **Actions** column will be blank for these forms.

To view an individual form or letter,

- Click the **Document name** hyperlink (within the **Document** column)

The selected document will display in a separate window – it will state **'Read Only'** across the top of the screen to highlight that you are just viewing the form.

If you already have a workflow step or another form (document) open you will see a message –

*'Please note that you already have a 'Workflow Step' window open'*

Or

*'Please note that you already have a 'Form' window open'*

Click the **OK** button to continue and open the second window.

You can only have two windows (workflow step and form, or two forms) open at once.

If you try to open an additional form/workflow step you will see another message –

*'You already have the maximum number of 2 'Form' / 'Workflow Step' windows open; please close one of them before opening a new one'*

You cannot open your workflow steps at the same time. If you try you will see another message –

*'As you already have an editable 'Workflow Step' window open, please close it before starting a new editable 'Workflow Step'*

The document you have opened can be viewed in this window or can be generated as a PDF document which can be viewed, saved and/or printed as required.

See the **Printing Documents** user guide for more details.

When you generate a PDF version of a Mosaic form, it automatically downloads to your computer.

It is important to regularly clear the download list from your computer as the documents downloaded from Mosaic contain a person's information.

Please refer to the **Clearing Downloads** user guide for further details.

# Attachments tab

The **Attachments** tab is where you will find all external documents that have been uploaded and attached to the record (both within and outside of workflow).

If the document was uploaded within a workflow step, the **Workflow Step Summary screen** can be accessed by clicking the **Step summary** icon  in the **Actions** column.

Documents uploaded within the **Documents** section itself (via the **Upload** button) will save with an **Edit Pencil** icon  in the **Actions** column this allows for the 'File as', 'Main category' and 'Sub-category' fields to be updated where required.

To view an individual uploaded document,

- Click the **Document name** hyperlink (within the **Document** column)

A **Download document copy** window will open.

- Click the **Download copy of document** button

When you retrieve an uploaded document from Mosaic, it automatically downloads to your computer.

Depending on your computer settings the downloaded document will either open in a separate window or will appear in a 'downloads bar' at the bottom of your screen, from where you can click the button to open the document.

The downloaded document will open in whatever file type it was uploaded as, i.e. Word documents will open as Word documents.

All downloaded documents can be saved, printed, emailed etc as needed.

> It is important to regularly clear the download list from your computer as the documents downloaded from Mosaic contain a person's information.
>
> Please refer to the **Clearing Downloads** user guide for further details.

## Navigating the Documents Section

The **Filed documents** screen is similar to the **Work history** screen for navigation:

- You can filter the contents of the documents table by typing details into the **Search** field - the list will shrink displaying only entries matching the search criteria used

- You can choose how many entries to display using the **Show entries** dropdown menu - it will default to show 15 steps per page

- The **First/Previous/Next/Last** buttons can be used to scroll through the documents if there are multiple pages

- The documents table can also be rearranged by each of the column headings - the default setting is in date order – newest at the top (descending)

For example: Clicking the arrow in the **Date** column allows you to rearrange the work by ascending or descending date order or clicking the arrow in the **Document** column allows you to group the work alphabetically by Title (A-Z or Z-A).

## Buttons on the Filed Documents Screen

There are several buttons located at the bottom of the **Filed documents** screen. The buttons visible are based on your user permissions and which tab you are in.

| Button | Which Tab Visible On | Use |
|---|---|---|
| Show more people | Both | Allows you to view documents for a person recorded as a personal relationship alongside the documents of the person's record you are in. Click the button and select the person/people whose documents you wish to view. A message will display if there are no people to select. |

| Button | Which Tab Visible On | Use |
|---|---|---|
| Upload | Attachments | Allows you to upload external documents to the record. Remember this can also be done within workflow steps.<br><br>See the **Uploading Documents** user guide for full details. |
| Download selected forms and letters | Forms and letters | Primarily to be used by Business Support/Admin for Subject Access Requests (SARs) and Legal Requests.<br><br>Once clicked this button downloads the selected documents (selected by ticking the checkbox in the Download column) to a zip file on your computer. |
| Download selected attachments | Attachments | Primarily to be used by Business Support/Admin for Subject Access Requests (SARs) and Legal Requests.<br><br>Once clicked this button downloads the selected documents (selected by ticking the checkbox in the Download column) to a zip file on your computer. |
| Create | Forms and letters | Allows you to complete a form outside of workflow.<br><br>There is only a limited list available here as these forms should be completed within workflow wherever possible.<br><br>Usually used where multiple forms are needed while completing a workflow step as only one copy of a form can be opened within a workflow step. |
| OK | Both | Use this button to exit the **Documents** section and return to the **Person summary** screen |