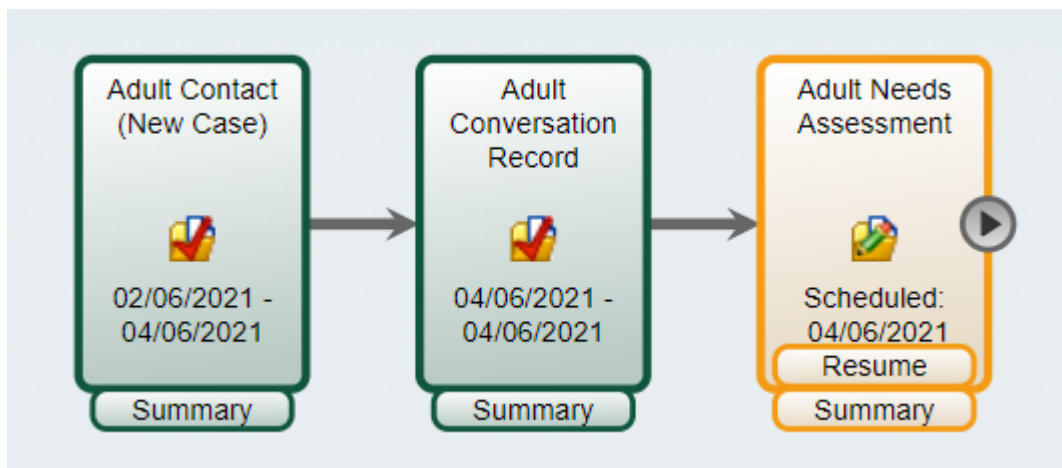


Adults Quick Guide

Workflow Map

The **Workflow map** allows you to view the person's workflow and see the progression of a case. It is a useful tool for a visual of a person's journey.



Both current and historic workflow can be viewed in the **Workflow map** screen.

To access the **Workflow map**:

- Click the **Workflow map** button on the **Current work** section on the **Person summary** screen


The **Workflow map** screen will open in a separate window.


There is a 'Key' which can be used to explain the colours and features of the **Workflow map**. This

is accessed by clicking the **Key** icon  - re-click the **Key** icon to hide (close) the key.

The **Workflow map** displays all type of workflow steps and each step is indicated by a different coloured box:

- **Incoming work** (to be started) – light blue

- **Completed work** (finished) – green
- **Incomplete work** (started but not finished) – orange
- **Future work** (scheduled to start in the future – usually reviews) – purple
- **No further action (NFA)** steps will also display on the map in grey boxes
- **Restricted work** – red with the restricted symbol  if you do not have sufficient permissions to view the workflow step

Potential next actions available from any Incoming, Incomplete or Future work can be viewed by clicking the **Arrow** icon 

This **Arrow** icon is also available from these potential next actions so workers can continue to view potential workflow further down the line.

Summary, **Start** and **Resume** buttons are available under the relevant workflow steps.


You should always see the **Summary** button, unless your access to the step is restricted, but will only see **Start/Resume** against workflow steps that have not been finished and are assigned to yourself.

- Clicking the **Summary** button will open a **Workflow Step Summary** screen in the main screen of Mosaic. The **Workflow map** window will be minimised.



The **Workflow Step Summary** screen will allow you to 'Start' or 'Resume' any Incoming, Incomplete or Future work as necessary, as long as it is assigned to yourself, to your team or a member of your team (or you have been sent a request or notification from that step).

It also allows you to access the documents (forms and letters) completed within that workflow step and any attachments. Please refer to the **Workflow Step Summary Screen** user guide for further information.

- Clicking the **Start** or **Resume** buttons will open the workflow step (in a new separate window over the Workflow map) – the **Workflow map** window will be minimised/hidden behind the workflow step window.

If the person has multiple workflows on their record, i.e. has had multiple workflow steps started via the Start sidebar menu, they can be viewed by clicking the **View workflows** icon  (next to the Key icon)

When the list of workflows displays:


- The **green tick**  indicates the workflow map that is currently shown on screen
- The **green dot**  indicates a current/ongoing workflow

The **Workflow map** does not show any optional forms or letters used during any workflow steps or any documents uploaded within a workflow step. These documents can be viewed by clicking on the **Summary** button within the map to open the **Workflow Step Summary**.

The **Workflow map** does not show any forms or letter templates created in the **Documents** section via the Create button and does not show any documents uploaded in the **Documents** section either. Please refer to the **Documents Section** user guide for further information.

When you access the **Workflow map** screen the most recent workflow will display – this is based on the latest step started from the Start sidebar menu. A new workflow is generated each time a step is started from the Start sidebar menu.

If there is no workflow on the record (i.e. the person is new on Mosaic and workflow has not yet been started) the **Workflow map** screen will open but you will see a message indicating 'No work has been recorded' and the icons at the top of the page will be greyed out.

The **Workflow map** screen window can be closed by clicking the **Close** icon 

The **Workflow map** is also accessible when in the **Work history** screen via the **Workflow map** button. **Work history** is very similar to the **Workflow map** in that they both show the person's journey. Both show very similar information but it is displayed in a different format. Please refer to the **Work History** user guide for further details.