Children's Services Quick Guide

Document Uploading in Mosaic - Good Practice Recommendations and Reminders

Document Titles

It's good practice to never upload documents with ambiguous titles. For documents with ambiguous titles, it can often be impossible to determine their nature without downloading and viewing them first. Searching for a particular document within a long list of attachments can become incredibly difficult if it's not been given a title that reflects its contents. For example, 'CS Contact 24-09-2019' is an unequivocal document title, whereas '24-09-2019' is not.

When you upload a file to Mosaic, either through a workflow step or directly via the Attachments tab within the Documents section, the filename will default into the 'File As' field, which is what's used for the Document Title (ie. under the 'Document' heading on the Attachments tab). Please ensure the 'File As' description is indicative of the document's general contents. Where a filename doesn't reflect a document's contents, amend text within the 'File As' field so that it does.

Categories and Subcategories

Always select the most appropriate Main Category and Subcategory when uploading each document, as it will assist users when searching for documents of particular types that have been uploaded to a person's record.

Password Protected Files

Please do not password protect documents before uploading them to Mosaic, and avoid uploading any documents that have already been protected with passwords. If you are uploading a file provided to you by someone else and the file is password protected, you must upload a non-protected instance of the file.

Mail Merge Documents

Please do not upload mail merged documents where a Mail Merge process is still active within a file. Otherwise, when users download such files from Mosaic and attempt to open them, an error message will be displayed, as the file won't be able to link to the original source used for the Mail Merge. For any files that have been subject to a Mail Merge, before uploading them to Mosaic, you need to ensure that the Mail Merge functionality is not still active.

Empty Files

When saving files within any applications (eg. Word; Excel), they can sometimes become corrupt for a variety of reasons. This can result in a saved file being empty (ie. it will be 0 bytes in size so will have no content). Before uploading a file to Mosaic, please ensure that it's not an empty file.

File Extensions

Please ensure that all documents you upload to Mosaic have valid file extensions. When downloading a file from Mosaic that has an invalid extension, it cannot be opened without ascertaining its native application and manually adding a file extension. This won't always be possible to achieve.

For example, a Word document uploaded with a file extension of ".docx" will download and open fine, whereas a file with an extension of ".Adult" will not. However, it won't necessarily be evident whether the ".Adult" extension should be changed to ".docx", ".pdf", ".jpg", etc, to be able to open the file within its native application.

Duplicate Documents

Please try to avoid duplication when uploading files to Mosaic. If you're unsure whether an upload has been successful or not then, in the first instance, see if the document appears in the Attachments tab within the Documents section and is downloadable.
Also, where a document has been uploaded to a workflow step, the exact same document shouldn't also be uploaded via the Attachments tab within the Documents section. The document uploaded to the step will also appear in the list on the Attachments tab so will already be accessible from here, too, as well as from the associated step summary screen. Where the exact same documents have been uploaded to both a step and via the Attachments tab, they'll appear twice within the Attachments list.

Document Dates

When uploading a document to Mosaic, it is date/time stamped with the date/time the document has been uploaded. As such, please be aware that when uploading documents retrospectively (eg. a document from 15th January 2019 is uploaded on 15th November 2019), the date that will appear against the document within the Attachments list in the Documents section will be 15th November 2019. This could potentially be misleading so, for retrospective document uploading, you might want to consider including a reference to the document's originally created date within the document title, so that it's made clearer to users when the document is from.

Editing Document Attributes

After uploading a document, if you realise you've made a mistake with either the title or the categorisation (ie. Main Category; Subcategory), these are attributes that can be edited. For documents uploaded via the Attachments tab within the Documents section, this can be done at any time by clicking on the pencil icon in the Actions column against the relevant document.

For documents uploaded via workflow steps, their attributes can be edited if the step is still open, by clicking on the paperclip icon within the step window, selecting the relevant document and clicking on the Edit button.

GDPR Considerations

As a matter of compliance with the GDPR, it's vital to ensure you're always uploading the correct files to the correct person records. Uploading incorrect information to a person's record, or uploading information to a person's record that relates to another person's record where they have no affiliation/involvement with their case, would constitute a breach of the GDPR.