Quick Guide, Mosaic Adults

Navigation Overview

Please Note: Depending on your permissions you may not see all of the menu options, buttons or content that is displayed in this or any other user guides.

There is no right click in Mosaic, to access all your menus please left click

Quick Start Menu

You will see the Quick Start Menu when you first log into Mosaic on the right hand side, this gives you the options to Find Person (search for a person), Find Worker (search for a worker), or Sign Out

Workviews

There are three workviews in Mosaic; Full Workview, Narrow Workview and Closed Workview

When you first log into Mosaic, the default workview is the **Full Workview**

When a client's record is accessed from the Full Workview the workview automatically changes to Narrow Workview **This is what we are used to seeing in Frameworki**.

The Closed Workview shows the Home Page or the client's Person Summary page and the main menu

To choose which workview you are viewing click one of the workview state icons

For ease of navigation and to see both the Person Summary screen and your current work choose the Narrow Workview icon

Work Tab Sections

There are 3 work tab sections: **Allocations**, **Recently Viewed** and **Current Work.** All sections can be opened and closed by clicking on the headings.

- Clicking a yellow folder in any of these sections displays it's contents
- Clicking on a client name hyperlink accesses the person Summary of that record
- Clicking on the title of a piece of work will display the summary for that piece of work

Current Work

The Current Work section brings together all of your work folders and displays:

1. **Incoming Work** (not yet started)
2. **Incomplete Work** (started but not yet finished)
3. **Future Work** (due to start in the future)
4. **Alerts** (case note alerts)
5. **Incoming Requests** (additional tasks and notifications)
6. **Incoming Authorisations** (Finance authorisations)

Please note: If there is no work within a folder, then the folder will not display

Hover over an icon within your work folder to show a yellow cog then click on the icon to reveal a list of actions available to you, such as start work, resume work or assign work.

Working on behalf of others (Act For)

The 'act for' functionality is available in the **Narrow** and **Full Workview**. This functionality is primarily set up for managers but can also be set up for other workers as required and can be set up permanently or temporarily as needed.

If you click on the act for icon you will see the list of workers you can act for, click on their name to see their workview. The **allocations** and **current work** tabs for the worker you have chosen will be available to access.

Team Workview

The Team Workview is available in the **Narrow** and **Full Workview**.

This is accessed by clicking on the Team Workview icon

At the top of the Team Workview screen you will see the Team name for the Team you are a member of.

Clicking the **Team** button gives the options to 'Work for the Team' (default setting), view a list of Team Members and Inboxes, View Sub Teams and view a list of Sub-Teams Members (if the Team has any Sub-Teams).

The Team Summary is open as default when entering the Team Workview. This can be closed or reopened by clicking on the Team Summary heading.

To see the Team Summary as a table you will need to be in **Full Workview**

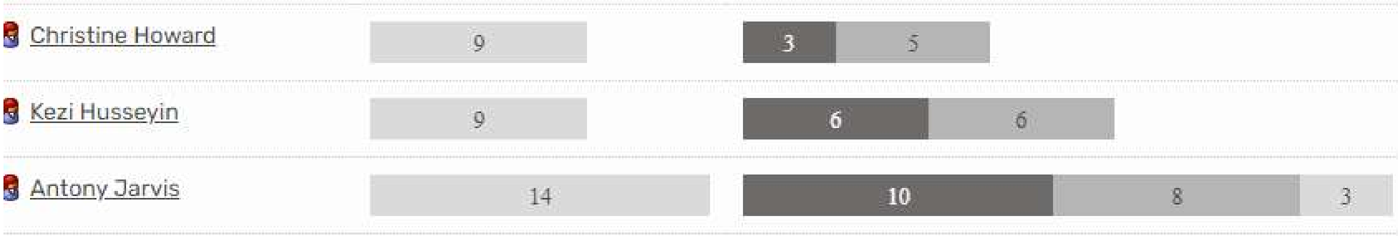
This allows you to see at a glance how much work the team and each worker has

The top row of the table displays the allocations and workload for **the Team**.

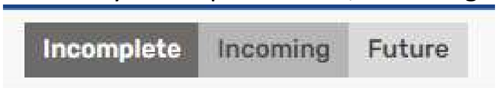
Team summary (27)

Worker/Sub-team ↑	Allocations	Workload	
		Incomplete / Incoming / Future	
Assigned to team		13	14

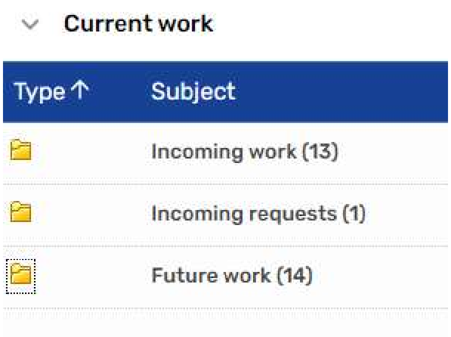
The subsequent rows display the allocations and workloads for each member of the team and any sub teams



The information displayed tells us how many Allocations each worker has (the number of open Worker Relationships) and the Workload assigned to each worker – how many Incomplete Work, Incoming Work and Future Work. These are displayed as various shades of grey



The **Current Work** section is found **underneath** the Team Summary. Click on the Current Work section to open it and display the work items assigned to the team.



The default setting for Current Work in Team Workview displays the work in folders by type. Only folders for the work currently **assigned to the Team** will display. Work assigned to the Team will show in the following folders: **Incoming Work**, **Incoming Requests**, and **Future Work.** Click to expand the folder and see the work

Work from within these folders can be assigned individually or in bulk.

You can use the bulk assign icon 

to assign multiple pieces of work

To assign work individually, hover your cursor over a work item it will change to a yellow cog and displays a dialogue box describing what the workflow step is and what actions you can take by left clicking on the icon