Uploading and viewing documents on MOSAIC

Click on *Documents* from the *Person Summary* screen

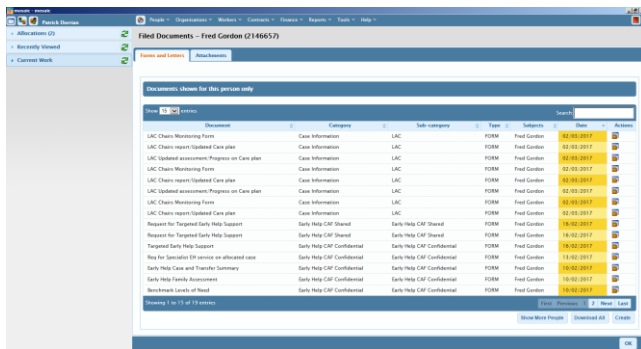

UPLOADING A DOCUMENT

When you are naming an electronic document please don't use any special symbols (!"£$%^&*()_+) as this causes problems when uploading the file

The documents screen is spit into 2 sections:

Forms and Letters – read only pdf versions of forms that are filled in on mosaic

Attachments – Any electronic file that has been uploaded

Click on **Attachments**

What do I need to fill in?
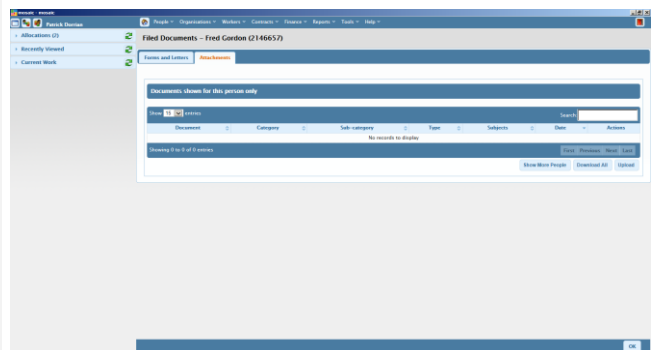
Click on **Upload**
Click on **Browse...** locate the file that you want to upload and double click on it.

*Select a **Main** and **Sub Category***

Click on **Upload and Close** if you are just uploaded the one document or if you want to upload more than one click on **Upload** and repeat the above
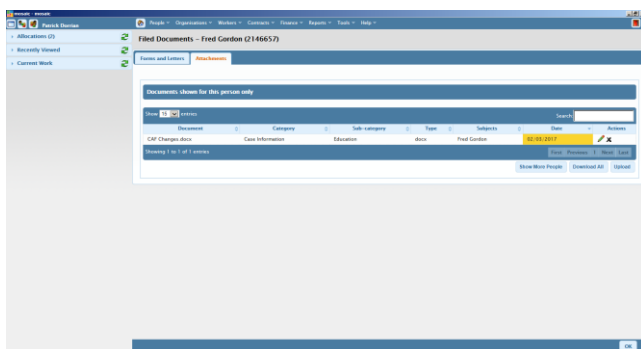
Click on **OK**

VIEWING AN UPLOADED DOCUMENT

On the documents summary screen

Click on the document's name, click on **Download Copy of Document** then click on **Open**
Once you have read the document click on the **X**

How do I upload an email
From outlook double click on the email to open it up in its own window.
Click on *File* then *Save As.*
Select where you want to save it, enter a File name (if necessary), change the *Save As Type* from Outlook Message Format – Unicode to Outlook Message Format then click *Save* - Upload the email as above.

Why would I want to upload an email
If the email has an attachment as you can open the email and the attachment from Framework-i. Emails without an attachment can be copied and pasted into a case note