

Navigating and filtering folders

This guide can support you to navigate your team folder and other team folders on Mosaic, including the use of filters.

Glossary of Workviews

There are a few ways in which you can view work, using the icons on the top left of your Mosaic screen. These are the different Workview icons and 'act fors' on Mosaic:



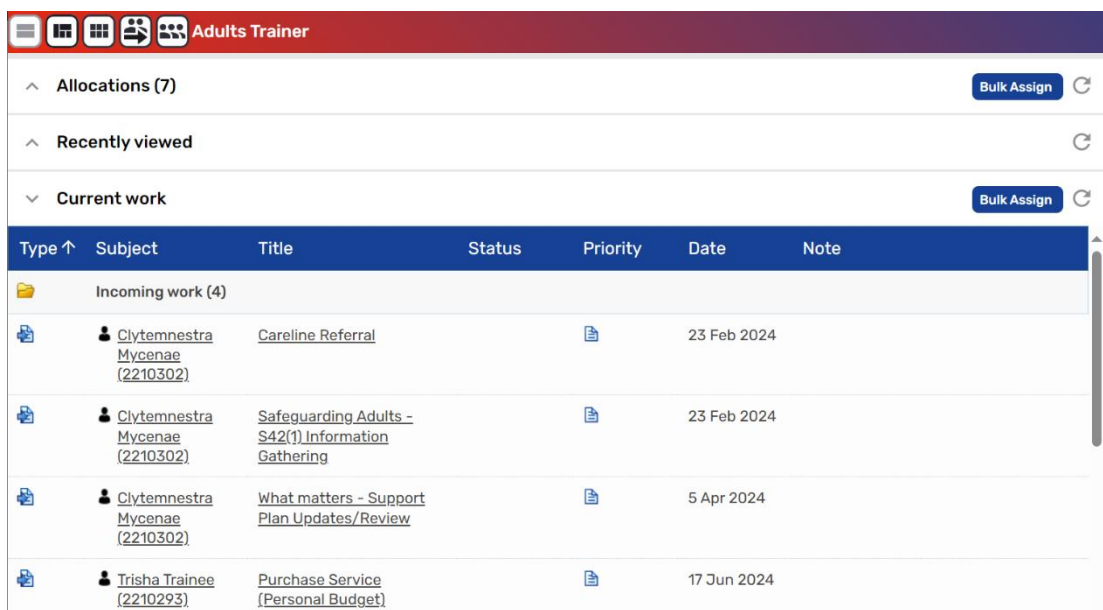
Full Workview

Click on this icon  to see a **Full Workview**.

The Full Workview is displayed below, based on your own folders. It fully takes up the entire screen, so you can focus on your folders only.


Click on the tabs such as *Allocations*, *Recently viewed* and *Current work* to access the contents.

If you want to assign a workflow step to another team or worker, it is best to use Full Workview to do so, choosing **Bulk Assign**, because it will keep the original due date of the work.

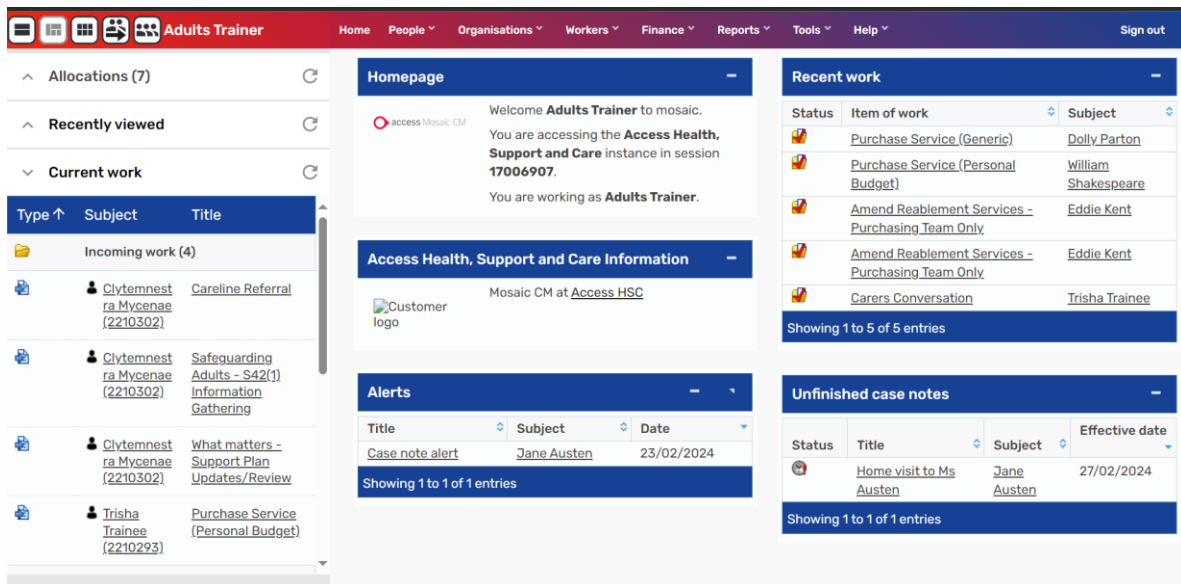


| Type ↑ | Subject | Title | Status | Priority | Date | Note |
|-------------------|--------------------------------|--|--------|----------|-------------|------|
| Incoming work (4) | | | | | | |
| | Clytemnestra Mycenae (2210302) | Careline Referral | | | 23 Feb 2024 | |
| | Clytemnestra Mycenae (2210302) | Safeguarding Adults - S42(1) Information Gathering | | | 23 Feb 2024 | |
| | Clytemnestra Mycenae (2210302) | What matters - Support Plan Updates/Review | | | 5 Apr 2024 | |
| | Trisha Trainee (2210293) | Purchase Service (Personal Budget) | | | 17 Jun 2024 | |

Narrow Workview

Click on this icon  to see the **Narrow Workview**.

The Narrow Workview is displayed below, and shows both your work folder and your homepage or a person's file, split on the screen.



Current work

| Type | Subject | Title |
|-------------------|--|--|
| Incoming work (4) | | |
| | Clytemnestra Mycenae (2210302) | Careline Referral |
| | Clytemnestra Mycenae (2210302) | Safeguarding Adults - S42(1) Information Gathering |
| | Clytemnestra Mycenae (2210302) | What matters - Support Plan Updates/Review |
| | Trisha Trainee (2210293) | Purchase Service (Personal Budget) |

Recent work

| Status | Item of work | Subject |
|--------|--|-------------------------------------|
| | Purchase Service (Generic) | Dolly Parton |
| | Purchase Service (Personal Budget) | William Shakespeare |
| | Amend Reablement Services - Purchasing Team Only | Eddie Kent |
| | Amend Reablement Services - Purchasing Team Only | Eddie Kent |
| | Carers Conversation | Trisha Trainee |


Showing 1 to 5 of 5 entries

Unfinished case notes

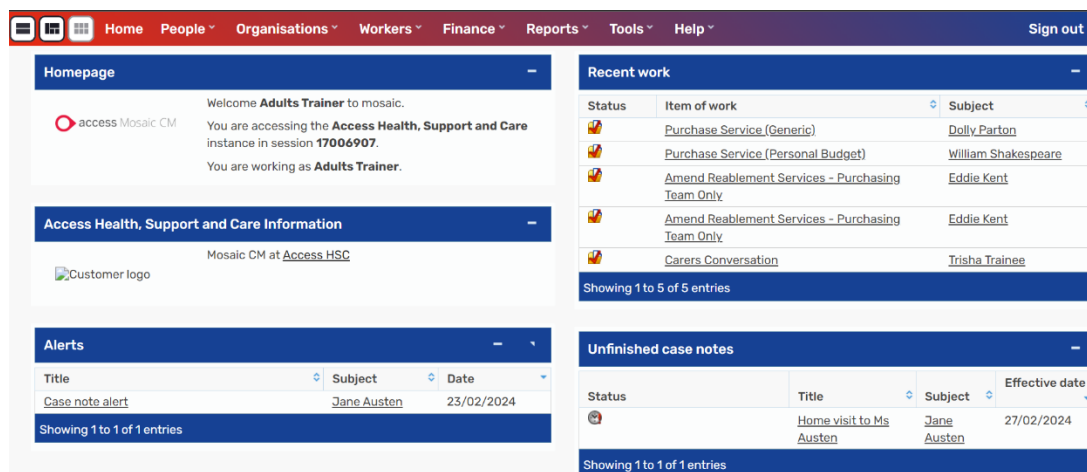
| Status | Title | Subject | Effective date |
|--------|-------------------------|-----------------------------|----------------|
| | Home visit to Ms Austen | Jane Austen | 27/02/2024 |

Showing 1 to 1 of 1 entries

Closed Workview

Click on this icon  to see the **Closed Workview**.

The Closed Workview is displayed below, and will only show your homepage or a person's file. Your folders have been hidden.



Recent work

| Status | Item of work | Subject |
|--------|--|-------------------------------------|
| | Purchase Service (Generic) | Dolly Parton |
| | Purchase Service (Personal Budget) | William Shakespeare |
| | Amend Reablement Services - Purchasing Team Only | Eddie Kent |
| | Amend Reablement Services - Purchasing Team Only | Eddie Kent |
| | Carers Conversation | Trisha Trainee |

Showing 1 to 5 of 5 entries

Unfinished case notes


| Status | Title | Subject | Effective date |
|--------|-------------------------|-----------------------------|----------------|
| | Home visit to Ms Austen | Jane Austen | 27/02/2024 |

Showing 1 to 1 of 1 entries



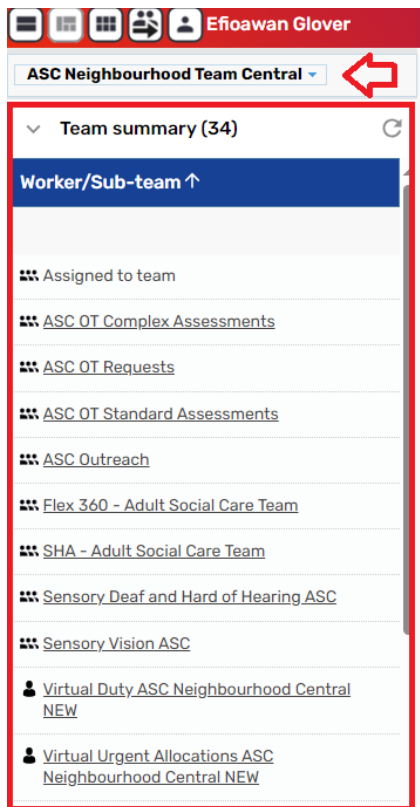
If one of the icons you select is greyed out, it indicates that you are currently on that icon.

Accessing your team folder

To access your team folder, click on the 'Show team workview' icon next to your name  Your team folder will then be displayed below.

Below is an example of a team folder, ASC Neighbourhood Team Central, and it will have different contents/sub-folders depending on the team.

At the top is the name of your team and underneath is the **Team summary**.



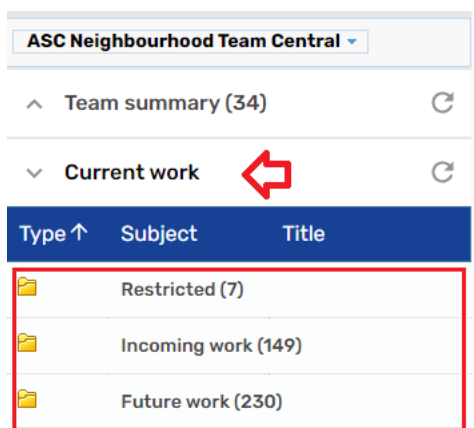
Team summary (34)

Worker/Sub-team ↑

- Assigned to team
- ASC OT Complex Assessments
- ASC OT Requests
- ASC OT Standard Assessments
- ASC Outreach
- Flex 360 - Adult Social Care Team
- SHA - Adult Social Care Team
- Sensory Deaf and Hard of Hearing ASC
- Sensory Vision ASC
- Virtual Duty ASC Neighbourhood Central NEW
- Virtual Urgent Allocations ASC Neighbourhood Central NEW



Remember to click on **Current Work** underneath **Team summary** to display the incoming work and future work assigned to that team. You will need to click in the additional folder/s e.g. *Incoming work* to show the contents:



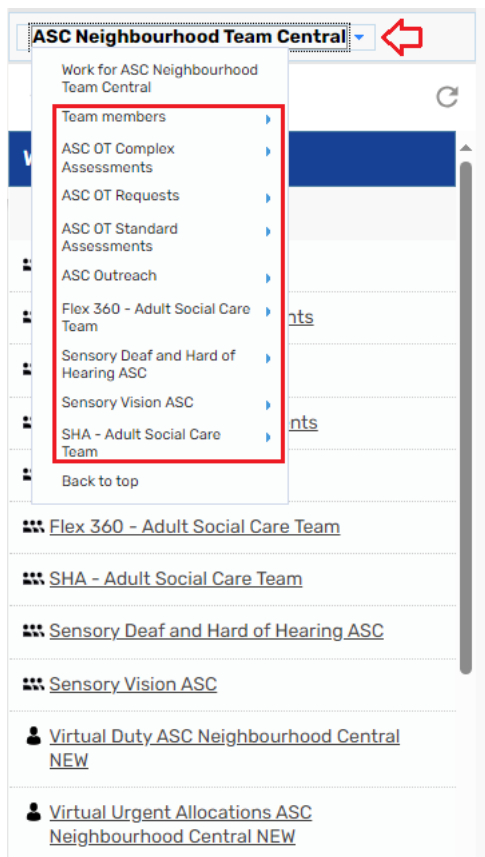
ASC Neighbourhood Team Central

Team summary (34)

Current work


| Type ↑ | Subject | Title |
|-------------|---------------------|-------|
| Folder icon | Restricted (7) | |
| Folder icon | Incoming work (149) | |
| Folder icon | Future work (230) | |

In addition to accessing folders through the **Team summary**, you can also access the same folders by clicking on the arrow next to your team name and then selecting from the options, including a list of team members and their allocated work:



Act for icon


You may have been provided with some 'act fors' on the system, if your role requires it. This enables you to 'act for' someone else- in most cases a virtual worker in your team or another team, or a duty worker.

You can find your act fors, under this icon: 

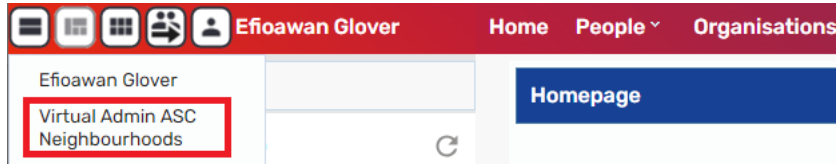
You may need to use your act for to pick up work in another folder and assign it to yourself. For more detailed guidance on how to use an act for, refer to the [Using A Virtual Worker Act For](#) guide.

When you no longer need to act for that worker, please remember to switch back to yourself again, using the same icon.

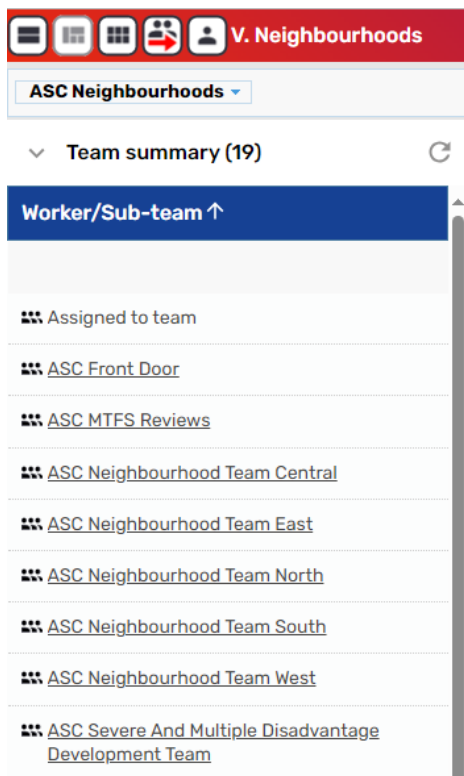
Accessing other team folders

To access another team folder, click on the 'act for' icon  and then select the relevant act for.

If you're in ASC, this is likely to be the **Virtual Admins ASC Neighbourhoods** act for, which enables you to access work in other neighbourhood folders to your own.

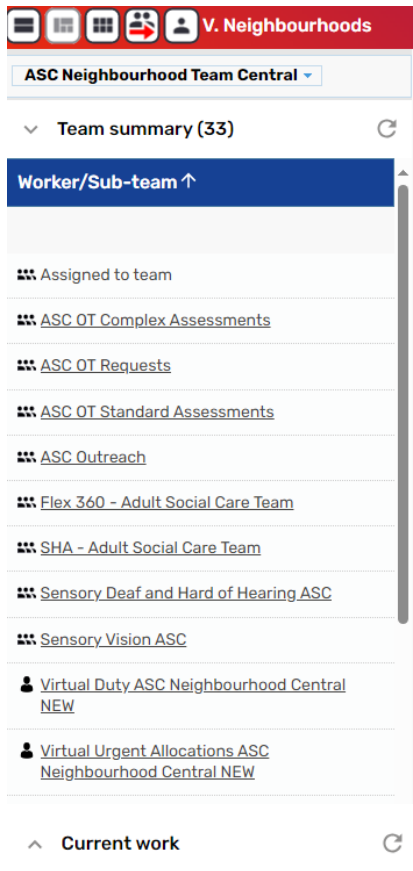


Once selected, the *Team summary* will display below:




Select the team folder you want to view e.g. ASC Neighbourhood Team Central.

When you select the folder, the name of the folder is displayed above *Team summary*:



To get a full overview of all the other folders in the *Team summary*, click on the show Full

Workview icon .

This section provides a team workload summary of the workflows and workers for that team. The numbers indicate the number of workflows in each folder.

| Worker/Sub-team ↑ | Allocations | Workload | | | Status of work | | |
|---------------------|-------------|------------|----------|--------|----------------|----------|------------|
| | | Incomplete | Incoming | Future | Overdue | Due soon | Due future |
| Assigned to team | | 149 | | 231 | | | |
| ASC OT Complex A- | | | | 410 | | | |
| ASC OT Requests | | 6 | | | | | |
| ASC OT Standard - | | | 169 | | | | |
| ASC Outreach | | 24 | | | | | |
| Flex 360 - Adult S- | | 3 | 14 | | | | |
| SHA - Adult Social- | | 21 | | | | | |

Filtering folders

Mosaic allows you to organise/ filter a team folder by either selecting the following:

1. Worker/Sub-team
2. Allocations
3. Workload

If you want to filter by any of these, click on the relevant title/ column along the blue bar. Here you can see the folder has been filtered by *Workload*:

| Worker/Sub-team | Allocations | Workload ↑ | | | Status of work | | |
|----------------------------------|-------------|------------|----------|--------|----------------|----------|------------|
| | | Incomplete | Incoming | Future | Overdue | Due soon | Due future |
| Assigned to team | | 149 | | 231 | | | |
| Sensory Deaf and Hard of Hea- | | | | | | | |
| ASC OT Requests | | 6 | | | | | |
| Flex 360 - Adult Social Care Te- | | 3 | 14 | | | | |



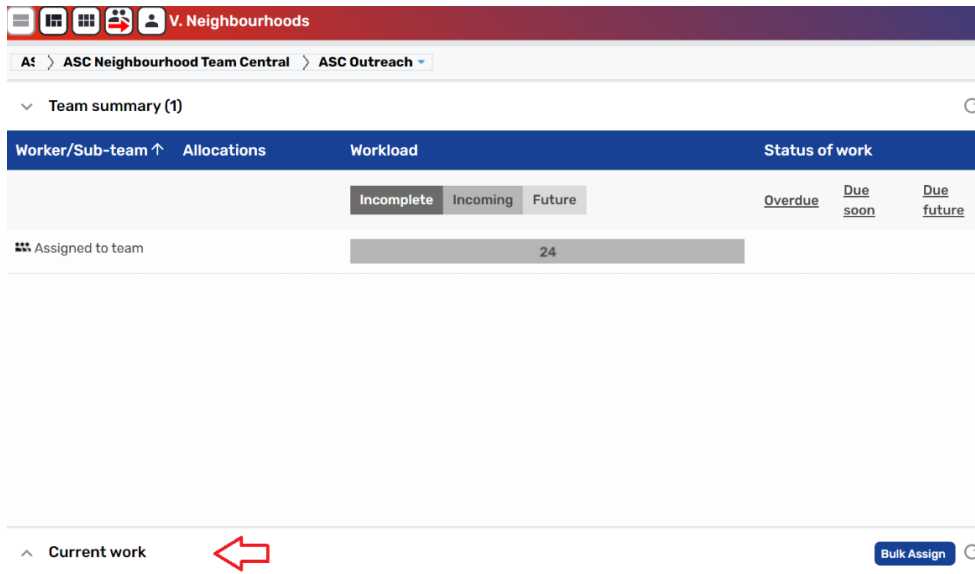
If the arrow is pointing up, the results will be in ascending order and if the arrow is pointing down, the results will be in descending order.

Finding work under a particular worker or sub-team folder

To access a team and or a particular worker's folder, click on sections under the **Worker/Sub-team** column e.g. ASC Outreach:

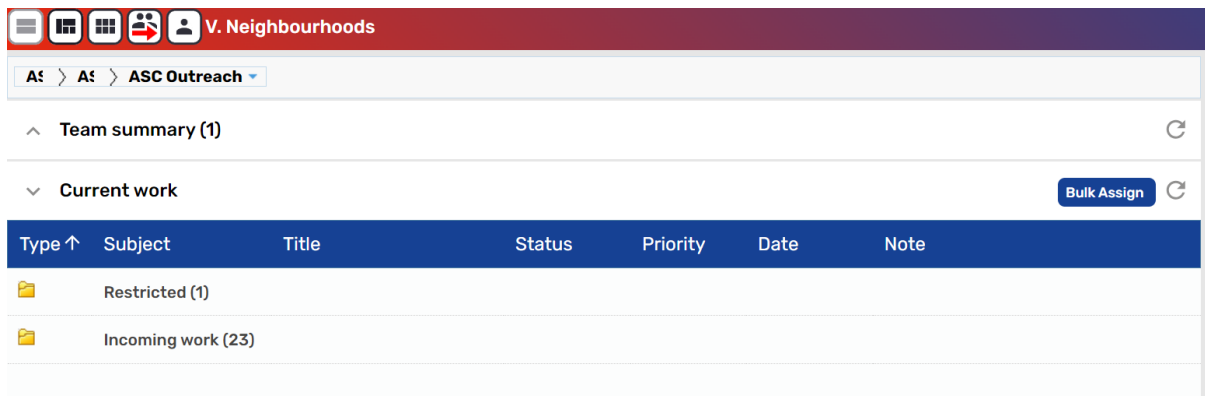
| V. Neighbourhoods | | | | | | | |
|-------------------------------------|-------------|------------|----------|--------|----------------|----------|------------|
| A: > ASC Neighbourhood Team Central | | | | | | | |
| Team summary (33) | | | | | | | |
| Worker/Sub-team ↑ | Allocations | Workload | | | Status of work | | |
| | | Incomplete | Incoming | Future | Overdue | Due soon | Due future |
| Assigned to team | | 149 | | 231 | | | |
| ASC OT Complex Assessments | | | | 410 | | | |
| ASC OT Requests | | 6 | | | | | |
| ASC OT Standard Assessments | | 169 | | | | | |
| ASC Outreach | | 24 | | | | | |
| Flex 360 - Adult Social Care Te- | | 3 | 14 | | | | |
| SHA - Adult Social Care Team | | 21 | | | | | |
| Sensory Deaf and Hard of Hea- | | | | | | | |
| Sensory Vision ASC | | 71 | | | | | |

Depending on your work view, it could look like below. You can then access the specific workflow listed under that sub-team/ worker, by selecting *Current Work*:



The screenshot shows a software interface for 'V. Neighbourhoods'. At the top, there is a navigation breadcrumb: 'A: > ASC Neighbourhood Team Central > ASC Outreach'. Below this is a 'Team summary (1)' section. The main area is a 'Workload' table with columns for 'Worker/Sub-team', 'Allocations', 'Workload', and 'Status of work'. The 'Workload' column has sub-columns for 'Incomplete', 'Incoming', and 'Future'. The 'Status of work' column has sub-columns for 'Overdue', 'Due soon', and 'Due future'. A bar chart shows 'Assigned to team' with a value of 24. At the bottom, there is a 'Current work' folder, highlighted with a red arrow, and a 'Bulk Assign' button.

Within the *Current Work* folder, you are likely to find 'Incoming work', 'Incomplete work' or 'Future work'. There may also be a 'Restricted' section, where files that cannot be viewed by you will be stored:



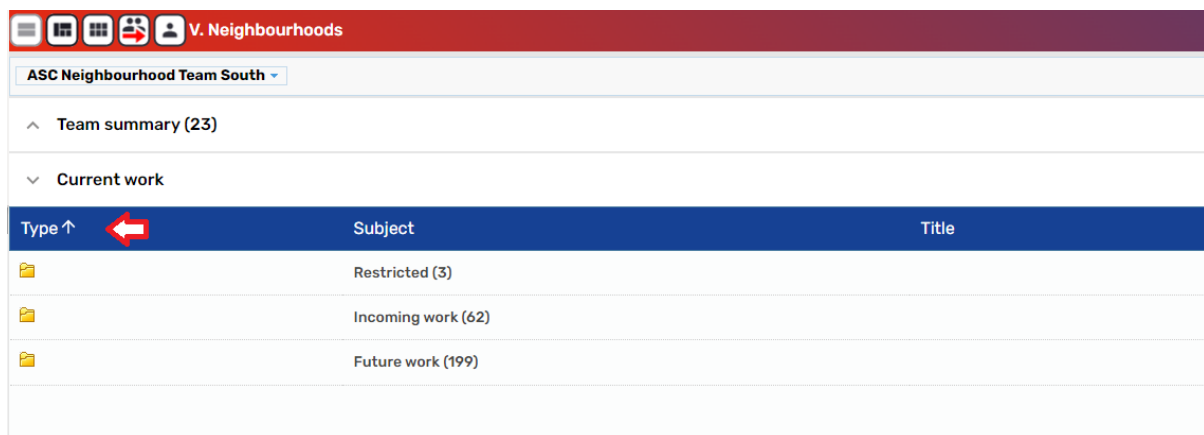
The screenshot shows a software interface for 'V. Neighbourhoods'. At the top, there is a navigation breadcrumb: 'A: > A: > ASC Outreach'. Below this is a 'Team summary (1)' section. The main area is a 'Current work' folder, highlighted with a red arrow, and a 'Bulk Assign' button. Below the 'Current work' folder, there is a table with columns for 'Type', 'Subject', 'Title', 'Status', 'Priority', 'Date', and 'Note'. The table shows two rows: 'Restricted (1)' and 'Incoming work (23)'. The numbers in parentheses indicate the number of workflows/pieces of work within each folder.

You will notice numbers next to the folders, which indicate the number of workflows/ pieces of work within.

Filtering a folder by Type, Subject, Title, Priority or Date

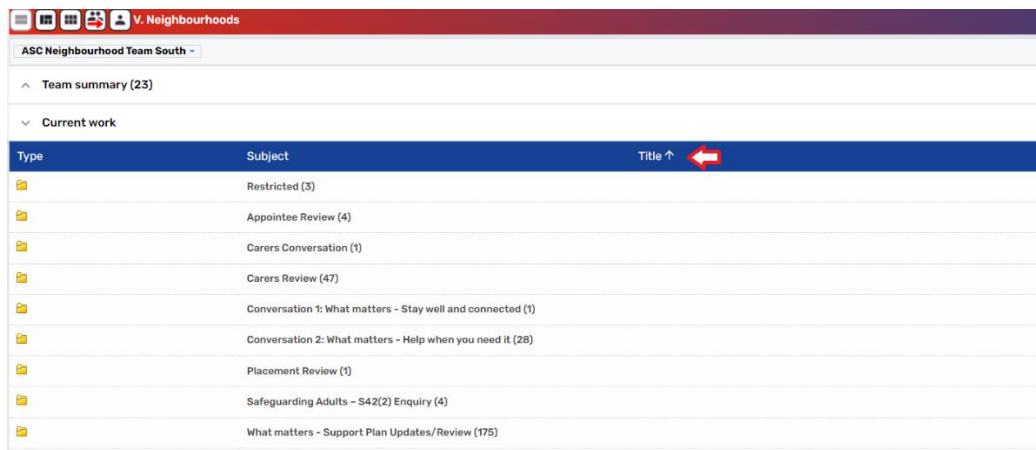
You can also organise the work in the folder by **Type** (Restricted, Incoming work and Future work), **Subject** (Name of person) and **Title** (workflow name- Placement review, Carers review etc).

To sort by **Type**, click on *Type* in the blue bar. There is now an arrow next to the column you have decided to filter:



The screenshot shows the 'V. Neighbourhoods' interface. At the top, there are navigation icons and the text 'V. Neighbourhoods'. Below that is a dropdown menu for 'ASC Neighbourhood Team South'. The main content area is titled 'Team summary (23)' and 'Current work'. A table header is visible with columns: 'Type ↑', 'Subject', and 'Title'. A red arrow points to the 'Type ↑' column. The table lists three categories: 'Restricted (3)', 'Incoming work (62)', and 'Future work (199)'.

If you are filtering by **Title**, click on *Title*, and you can see it has grouped together the different workflow steps based on their name:

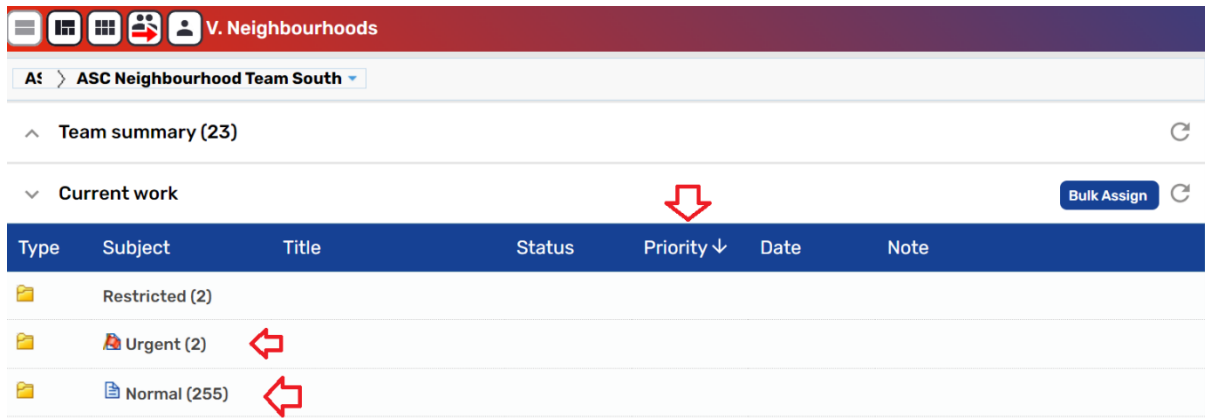


The screenshot shows the 'V. Neighbourhoods' interface. At the top, there are navigation icons and the text 'V. Neighbourhoods'. Below that is a dropdown menu for 'ASC Neighbourhood Team South'. The main content area is titled 'Team summary (23)' and 'Current work'. A table header is visible with columns: 'Type', 'Subject', and 'Title ↑'. A red arrow points to the 'Title ↑' column. The table lists various workflow steps grouped by subject: 'Restricted (3)', 'Appointee Review (4)', 'Carers Conversation (1)', 'Carers Review (47)', 'Conversation 1: What matters - Stay well and connected (1)', 'Conversation 2: What matters - Help when you need it (28)', 'Placement Review (1)', 'Safeguarding Adults - S42(2) Enquiry (4)', and 'What matters - Support Plan Updates/Review (175)'.

By clicking a particular group of workflow steps, Carers Reviews for example, the dates will be in descending order:

| Type | Subject | Title ↑ | Status | Priority | Date | Note |
|---------------|-------------------------|---------------|--------|----------|-------------|---|
| Folder icon | Restricted (2) | | | | | |
| Folder icon | Appointee Review (4) | | | | | |
| Folder icon | Carers Conversation (1) | | | | | |
| Folder icon | Carers Review (46) | | | | | |
| Document icon | | Carers Review | | | 1 May 2026 | |
| Document icon | | Carers Review | | | 12 Jun 2025 | Please review if the budget was used as requested (taxi costs and other social event costing) as wel... |
| Document icon | | Carers Review | | | 27 Apr 2025 | |

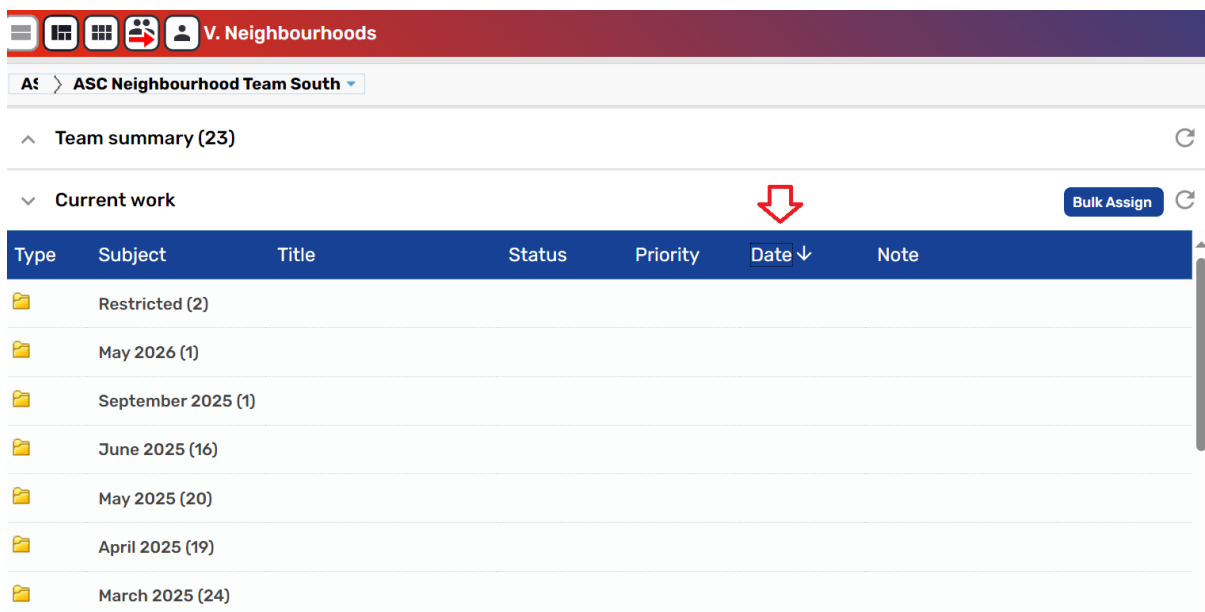
You can also sort this folder by **Priority**, where you can then click on the *Urgent*, *Normal* or *Low* folders to access the workflows:



The screenshot shows a software interface for 'V. Neighbourhoods'. The breadcrumb path is 'A: > ASC Neighbourhood Team South'. Under 'Current work', there is a table with columns: Type, Subject, Title, Status, Priority, Date, and Note. The 'Priority' column is selected, indicated by a red arrow. Below the table, there are three folder entries: 'Restricted (2)', 'Urgent (2)', and 'Normal (255)'. Red arrows point to the 'Urgent' and 'Normal' folders. A 'Bulk Assign' button is visible in the top right of the 'Current work' section.

Usually, the priority is set by the team manager.

In addition to this, you can filter the folder by **Date**:



The screenshot shows the same software interface for 'V. Neighbourhoods'. The breadcrumb path is 'A: > ASC Neighbourhood Team South'. Under 'Current work', there is a table with columns: Type, Subject, Title, Status, Priority, Date, and Note. The 'Date' column is selected, indicated by a red arrow. Below the table, there are several folder entries representing months and years: 'Restricted (2)', 'May 2026 (1)', 'September 2025 (1)', 'June 2025 (16)', 'May 2025 (20)', 'April 2025 (19)', and 'March 2025 (24)'. A 'Bulk Assign' button is visible in the top right of the 'Current work' section.

All workflow due during that month and year will be visible under these folders.



Please note, you can only use one filter at a time. For instance, you cannot filter by workflow *Title*, and then further filter by *Date*. For a more detailed analysis/ overview of a team's work, the dashboard should be used.