Adults Quick Guide

Team Inboxes

The purpose of a team inbox (virtual worker) is to provide the ability to manage the team's workload by "filing" workflow steps into folders, rather than having all work sitting in the team's **Current work** folders.

Work can be re-assigned from a team inbox to a worker within the team when there is the capacity to do so and/or the work is due to be completed.

Assigning Work to a Team Inbox

Workflow steps can be reassigned from the team's **Current work**, from one team inbox to another or from a worker to a team inbox as required.

The process of assigning work to a team inbox is the same regardless. Workflow steps can be assigned individually (one at a time) or in bulk – (multiple items at the same time).

Bulk Assign

To assign some or all of the work in **Current work** to a team inbox click on the **Bulk Assign** button located on the **Current work** section

Please note: Bulk Assign is only available in the **Full workview**.

The **Bulk action** window will display.

All the current work is listed and can be filtered using the search field.

You can also rearrange/filter the list by clicking on any of the column headers i.e. **Title, Subject, and Priority** etc.

You can select individual items by clicking the checkbox to their right, or click on the checkbox in the header to select all the current work.

Select the team inbox from the worker dropdown list, or to find a team inbox (belonging to another team), click the **Find** button and complete a worker search.

Once you have selected the relevant team inbox the **Preview assign** button is enabled.

By clicking **Preview assign**, the selected items are displayed and can be assigned.

You can add an optional note for the team inbox receiving the assigned work – this will display on all records if assigning multiple work steps so should not be case specific.

Click the **Assign** button to make the reassignment, or click the **Cancel** button to close the window without reassigning.

Assigning Work Individually

You can assign individual workflow steps in both the **Narrow** and **Full workviews**.

To assign workflow steps from **Current work** to a team inbox individually (one at a time):

- Hover the cursor over a **work** icon next to the step you wish to assign – the icon changes to a **yellow cog** 🌼 and displays a dialogue box describing what the workflow step is

- Left click this icon to see a list of actions available – this will vary according to your role and permissions and the type of work you are looking at.

- Click **Assign work**

An **Assign work** window opens

Select the team inbox from the Team worker dropdown list, or to find a team inbox (belonging to another team), click the **Find** button and complete a worker search.

An optional note for the team inbox receiving the assigned work can also be added.

Click the **OK** button to complete the assignment, or click the **Cancel** button to close the window without reassigning

Accessing a Team Inbox

Team inboxes are setup as 'workers' within a team, meaning they can be accessed via the **Team workview**

From **Full** or **Narrow workview**.

Click the **Show team workview** icon

This icon changes to when you are in the **Team workview**.

When in Team workview –

Either

- Click the **arrow** besides the **team name** button at the top of the screen and select 'Team members' from the menu, then click the **'team inbox'** name from the list that displays.

Or,

From the **Team summary** section:

- Click the **'team inbox'** name hyperlink

The team inbox will display giving you access to the **Allocations** (which will always be blank) and **Current work** sections for the inbox.