Workday Inbox

For Managers, Employees, and Contingent Workers
Navigating your Inbox
Your Inbox

The Inbox is your personal activity stream.
It includes Tasks (i.e. Approvals, To Dos) that require your action.

**You must act on every item in your inbox.**

**To Access your Inbox:**

Click the *Go to All Inbox Items* button on the *Inbox Preview* on the home page.

or click the *Inbox icon* in the *Header.*
Features of the Inbox

- Use the button to expand the navigation pane.
- On the left of your inbox, you have delivered filters as well as the ability to Manage Filters and create your own.
- You can Search for inbox tasks using the search functionality in the middle of the screen.
What is a Business Process?

- A business process is a set of tasks that people initiate, act upon and complete.
- Each process achieves a desired business objective.
- Once initiated, Workday routes tasks to the responsible users based on business rules.
- Notifications may also be sent out to let a user know important information or that they have a task awaiting their action.
- Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee, etc.
Inbox Tasks

There are 3 main types of Inbox Tasks:

**Actionable Tasks**
These include tasks where you must input information and then Submit the task, such as submitting a termination.

**Approvals**
These are tasks where you must review and accept (approve) or deny another users’ request, such as a request for a new job requisition.

**To Dos**
These provide written instruction and sometimes Used to take you to a different task. An example is a Check-In.
Here are a few examples of Actionable Tasks. There are many more types than just these examples.
## Approvals

Here are a few examples of Approvals:

### Review

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Process</strong></td>
<td>Create Position: Surgical Scrub Tech</td>
</tr>
<tr>
<td><strong>Overall Status</strong></td>
<td>In Progress</td>
</tr>
<tr>
<td><strong>Due Date</strong></td>
<td>10/03/2021</td>
</tr>
<tr>
<td><strong>Position Details</strong></td>
<td>GCMC Pediatrics, Childbirth Center and Nursery Nursing Team</td>
</tr>
<tr>
<td><strong>Position Request Reason</strong></td>
<td>Create Job Requisition &gt; Standard &gt; Replacement</td>
</tr>
</tbody>
</table>

**Review**

- **Internal Career:** Internal: Inpatient RN- Trauma Medical Surgical
- **For:** Abigail Gelsinger (98765)
- **Overall Process:** Internal Career: Internal: Inpatient RN- Trauma Medical Surgical
- **Overall Status:** In Progress
- **Due Date:** 09/30/2021

**Details to Review**

- **Job Details**
  - Approve
  - Send Back
  - Deny
  - Cancel
To Dos

To Dos provide written instruction and sometimes Used to take you to a task.

When you are finished with the To Do, you must click the ‘Submit’ button at the bottom of the screen in order to remove the task from your inbox.

You may have been redirected to another task in Workday, so don’t forget to return to the inbox to click this button.
To review or check the status of a process:

1. Navigate to your **Inbox**.

2. Click the **Archive** tab. Here you will see any business processes with which you have been involved in the last 30 days.

Two tabs can be seen here in the archive, under **View Details**, or after a task has been submitted:

The **Details** tab for each task is where you can find what was entered for the task.

The **Process** tab displays the process history, and future steps.
Frequently Asked Questions
Do you have a task stuck in your inbox?

1. Navigate to your inbox
2. Click on the gear icon in the top right
3. Select Cancel, Skip This Task, or Delete Incomplete
4. Enter a Comment
5. Hit Submit

**Note:** if you don’t have Cancel, Skip This Task, or Delete Incomplete as an option:

1. Select View Details
2. Click the Related Actions (brick) icon on the Parent Process
3. Choose Cancel
Do you have a task that isn’t yours?

1. Navigate to your inbox
2. Click on the **gear icon** in the top right
3. Select **Reassign**
4. Enter a **Proposed Person**
5. Enter a **Reassignment Reason**
6. Hit **OK**
7. **This task will remain in your inbox until the Reassignment is approved by Human Resources.**
Common Issues

Critical Validations

• determines if you have entered the required information correctly

• a hard red “error” prevents you from moving forward until you have corrected the error

Warning Validations

• alerts you to something that may have been entered incorrectly

• a soft orange “alert” does not prevent you from moving forward

Click on the “View All” button to read the error message and take appropriate action.
Common Buttons in the Inbox
### Task Buttons

**Submit Button**
Used to accept and submit your changes, while advancing the business process to the next step.

**OK Button**
Used to accept and save your changes.

**Next Button**
Used to advance you to the next page or the next step in your task's process.

**Done Button**
Used to close a confirmation screen.

**Cancel Button**
Used to disregard a change.

**Save for Later Button**
Used to save the item in your Inbox until action is taken.

**Open Button**
Used to open the desired task.

**Back Button**
Used to return you to the previous page.

**More Button**
Used to display several additional choices based on the business process.
Data Input Buttons

Attachments Icon
Used to attach .pdf files, Word, and Excel documents to a task.

Add Button
Used to add additional information to any task.

Add / Delete Row
Used to add or remove the current row from a grid.

Edit Icon
Used to change information on the page.

Comments Icon
Used to leave comments for yourself or other users for a particular page or task.

Prompt
Used to present a list of options for a specific field.

Required Field Indicator
A field with a red asterisk indicates you must enter a value for this field before saving or submitting the page.

Calendar
Used to open a calendar to select a date.

Progress Bar
Tracks your progress working through a task. It also allows you to move forward or return to a previous page within the task.
Questions?

Contact our **Employee Contact Center** at 570-271-6640 or via email at employeecontactcenter@geisinger.edu.