

# Workday Inbox

**Geisinger**

For Managers,  
Employees, and  
Contingent Workers

The background is a solid blue color. On the left side, there is a white arrow shape pointing towards the right. The text is centered within the blue area.

# Navigating your Inbox

# Your Inbox

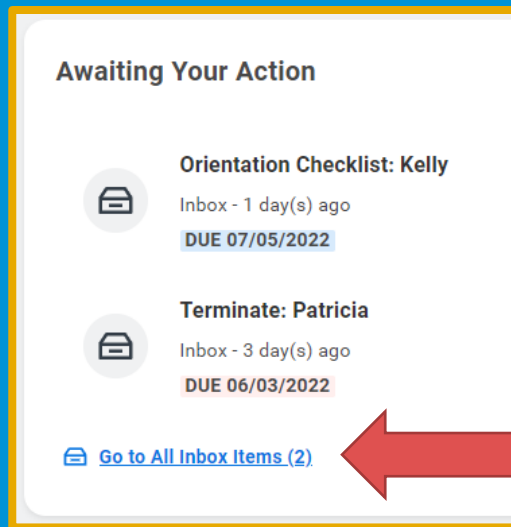
The Inbox is your personal activity stream.

It includes Tasks (i.e. Approvals, To Dos) that require your action.

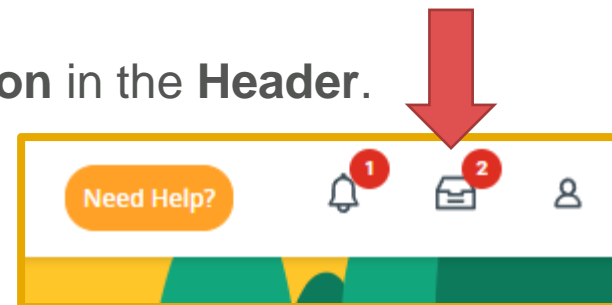
**You must act on every item in your inbox.**

## To Access your Inbox:

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

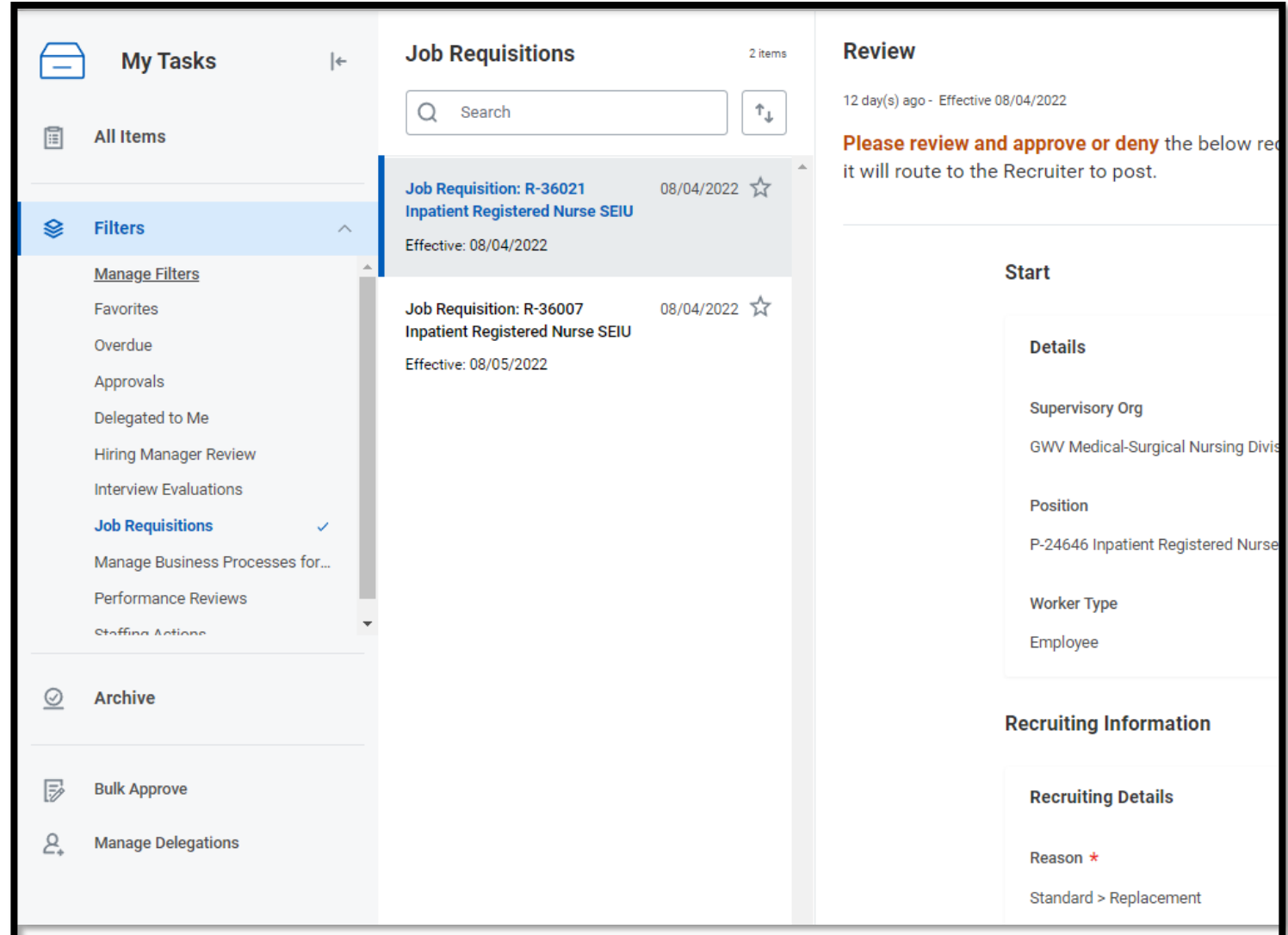
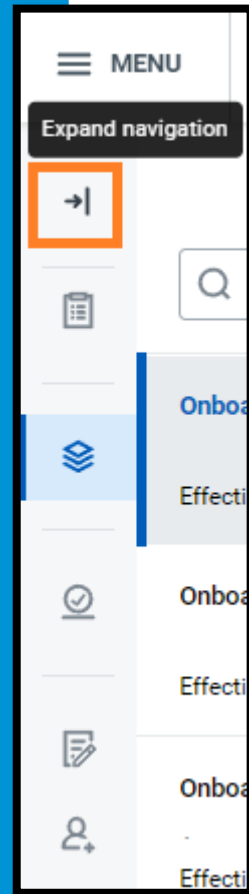


or click the **Inbox icon** in the **Header**.



# 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 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.

# Actionable Tasks

Here are a few examples of Actionable Tasks.

There are many more types than just these examples.

## Review Documents

### Review Documents


Review Documents for Onboarding

7 day(s) ago - Due 11/03/2021; Effective 10/04/2021

**It is a Geisinger Policy to complete a Department Orientation** the attached checklist or use your own standardized department checklist.

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#### Documents

Document	 <a href="#">Department Checklist (4/19)</a>
Instructions	Please download and complete the Onboarding checklist. Once completed, please attach the completed checklist.

## Evaluations

### Complete Manager Evaluation

Manager Evaluation: 2021

20 day(s) ago - Effective 07/31/2021

Review Period  
09/01/2020 - 07/31/2021

**Employees:**  
**Please complete each section of the self evaluation.** Follow up with you to review all sections and overall rating before closing.

## Sub Processes

### Inbox

Actions Archive

Viewing: All Sort By: Newest

- Reassign Inbox Tasks: Amy  
On behalf of Linda  
4 day(s) ago - Due 08/02/2022; Effective 07/31/2022
- Job Requisition for Backfill: Landon  
5 day(s) ago
- Job Requisition for Backfill: Bonnie  
11 day(s) ago - Effective 05/27/2022

### Create Job Requisition Sub Process

11 day(s) ago - Effective 05/27/2022

For assistance creating your job req click on below job aid that...

**Start**

**Details**

# Approvals

Here are a few examples of Approvals:

**Review** Create Position: Surgical Scrub Tech ⋮

9 day(s) ago - Due 10/03/2021; Effective 10/01/2021

**For** Job Requisition: R-20626 Surgical Scrub Tech

**Overall Process** Create Position: Surgical Scrub Tech

**Overall Status** In Progress

**Due Date** 10/03/2021

**Details to Review**

**Position Details**

**Organization** GCMC Pediatrics, Childbirth Center and Nursery Nursing Team

**Positions Created** (empty)

**Position Request Reason** Create Job Requisition > Standard > Replacement

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Job Posting Title \* Surgical Scrub Tech

[Approve](#) [Send Back](#) [Deny](#) [Cancel](#)

**Review**

Internal Career: Internal: Inpatient RN- Trauma Medical Surgical

11 day(s) ago

**For** Abigail Geisinger (98765)

**Overall Process** Internal Career: Internal: Inpatient RN- Trauma Medical Surgical

**Overall Status** In Progress

**Due Date** 09/30/2021

**Details to Review**

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[Job Details](#)

[Approve](#) [Send Back](#) [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.

The screenshot shows a 'Complete To Do' task interface. At the top, it says 'Complete To Do' and '90 Day Check In Conversation'. Below this are icons for star, calendar, PDF, settings, and share. The task details include: '9 day(s) ago - Due 10/04/2021; Effective 07/04/2021', 'For: GWV Critical Care & Progressive Care Unit Nursing Division', 'Overall Process: Promotion:', 'Overall Status: Successfully Completed', and 'Due Date: 06/24/2021'. The 'Instructions' section contains a paragraph about check-ins. At the bottom, there are three buttons: 'Submit', 'Save for Later', and 'Close'. A teal arrow labeled 'Written Instruction' points to the instructions text. A teal arrow labeled 'Task Button' points to the 'Check-Ins' button. A red arrow labeled 'Submit' points to the 'Submit' button at the bottom.

**Complete To Do**

90 Day Check In Conversation

☆ 📅 PDF ⚙️ 📄

9 day(s) ago - Due 10/04/2021; Effective 07/04/2021

**For** GWV Critical Care & Progressive Care Unit Nursing Division

**Overall Process** Promotion:

**Overall Status** Successfully Completed

**Due Date** 06/24/2021

**Instructions** **Check-Ins are an easy way for managers and employees to schedule, prepare for and document notes during 1 on 1 meetings.** An employee's first 30, 60 and 90 days of employment are a critical time for giving and receiving feedback such as establishing role specific expectations or coaching for performance to ensure success in your employee's new role. **Workday's Check-In functionality can help you stay on track with the 30, 60 and 90-day check-ins.**

**Written Instruction**

**Task Button** Check-Ins

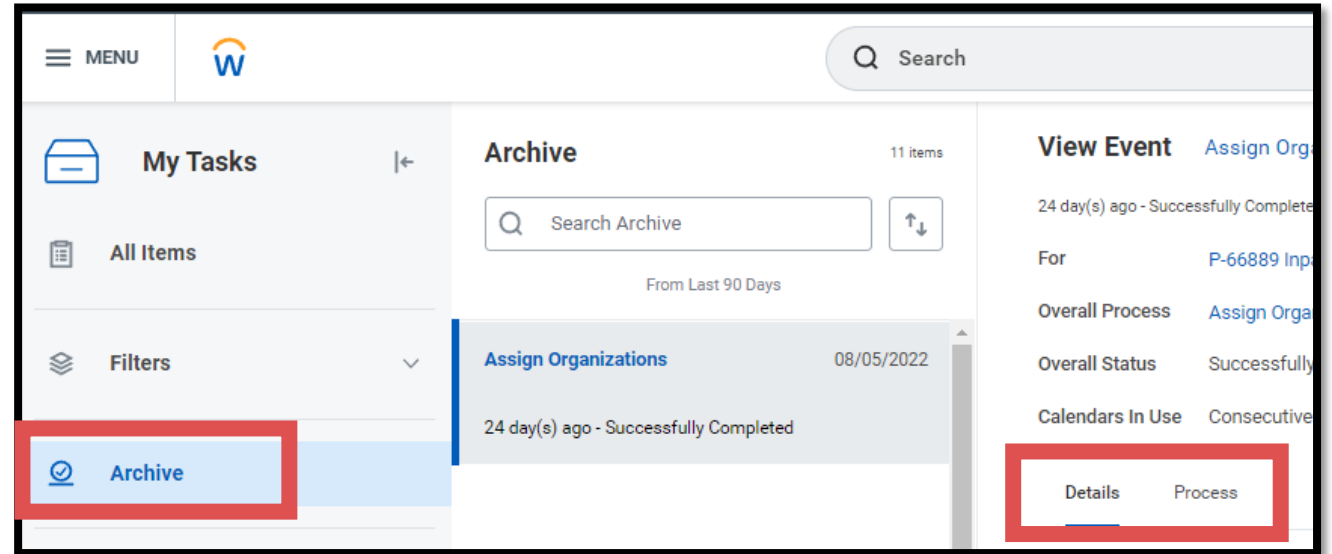
enter your comment

**Submit** Submit Save for Later Close

# Inbox Archive

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.

The background is a solid red color. On the left side, there is a white arrow shape pointing towards the right. The text is centered within the red area.

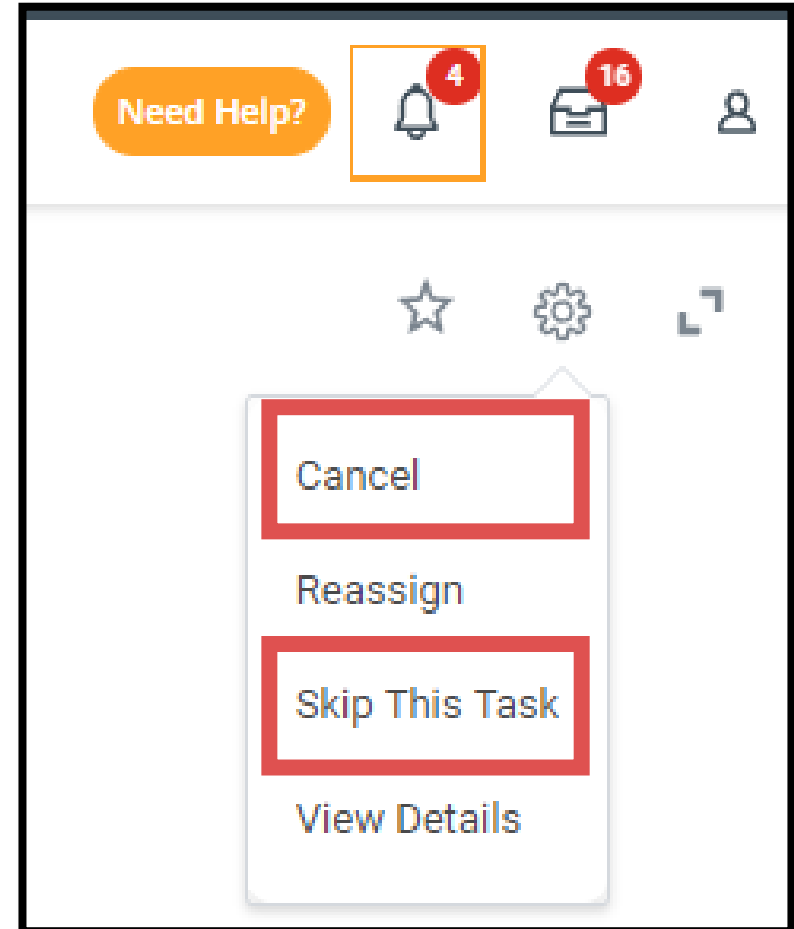
# **Frequently Asked Questions**

# 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**

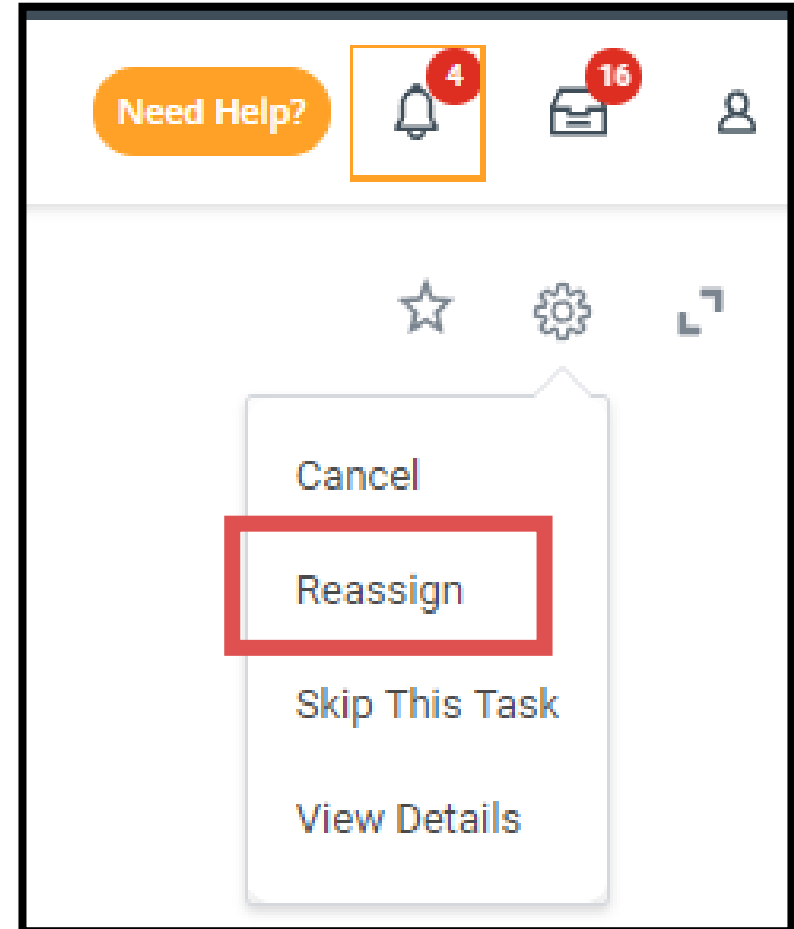
**Note:** if you don't have **Cancel**, **Skip This Task**, or **Delete Incomplete** as an option:

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



More Button

Used to display several additional choices based on the business process.

Submit

Submit Button

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

OK

OK Button

Used to accept and save your changes.

Next

Next Button

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

Done

Done Button

Used to close a confirmation screen

Cancel

Cancel Button

Used to disregard a change.

Save for Later

Save for Later Button

Used to save the item in your Inbox until action is taken.

Open

Open Button

Used to open the desired task.

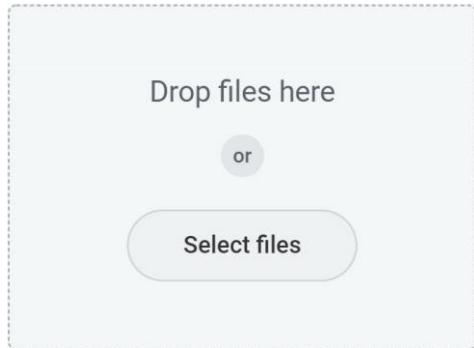
Back

Back Button

Used to returns you to the previous page.



# Data Input Buttons



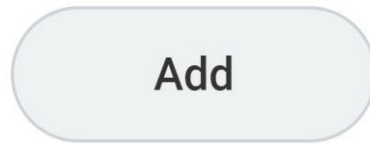
## Attachments Icon

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



## Prompt

Used to present a list of options for a specific field



## Add Button

Used to add additional information to any task.



## Comments Icon

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



## Add / Delete Row

Used to add or remove the current row from a grid.



## Edit Icon

Used to change information on the page.



## 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](mailto:employeecontactcenter@geisinger.edu).

**Geisinger**