Workday Inbox

For Managers, Employees, and Contingent Workers

Geisinger

Navigating your Inbox

Your Inbox

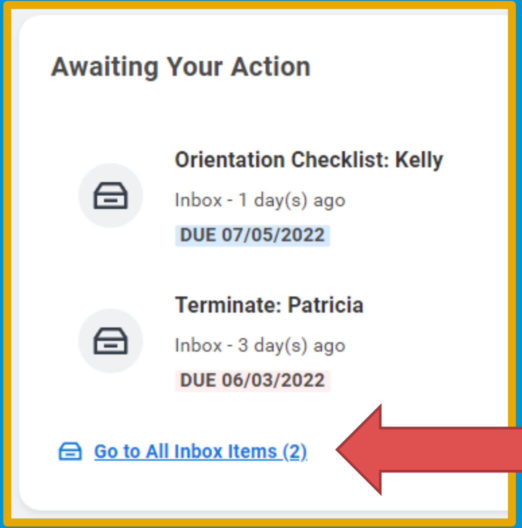
The Inbox is your personal activity stream.

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

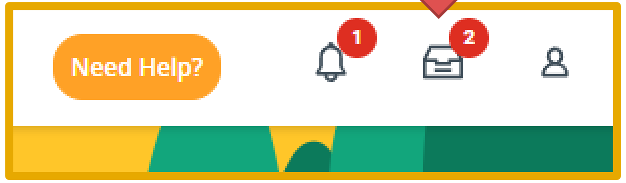
You must act on every item in your inbox.

To Access your Inbox:

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

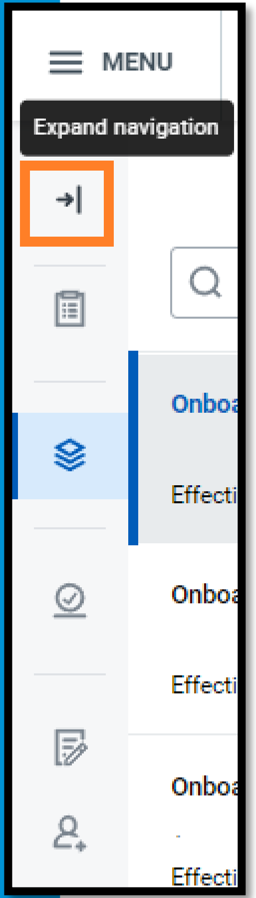


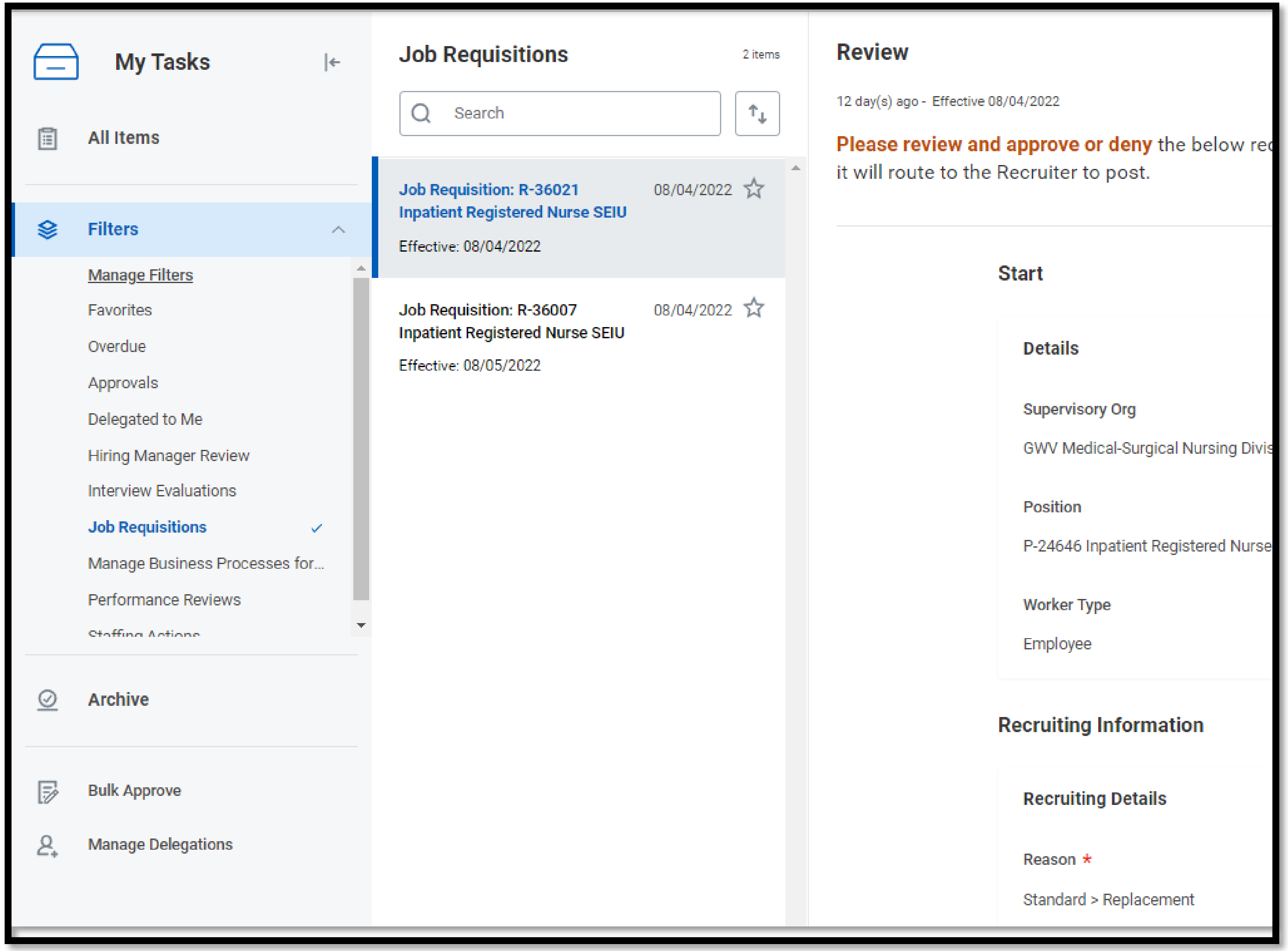
or click the **Inbox icon** in the **Header**.



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

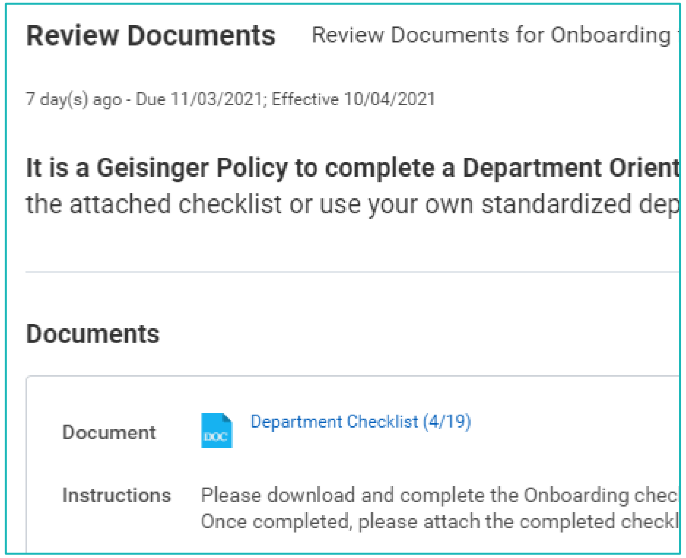
These provide written instruction and sometimes Used to take you to a different task. An example is a Check-In.

Actionable Tasks

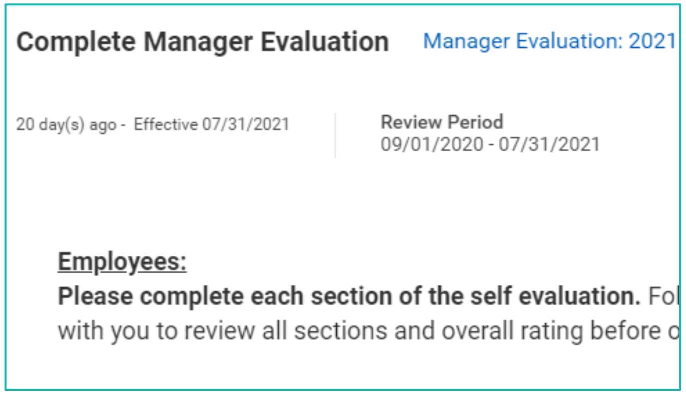
Here are a few examples of Actionable Tasks.

There are many more types than just these examples.

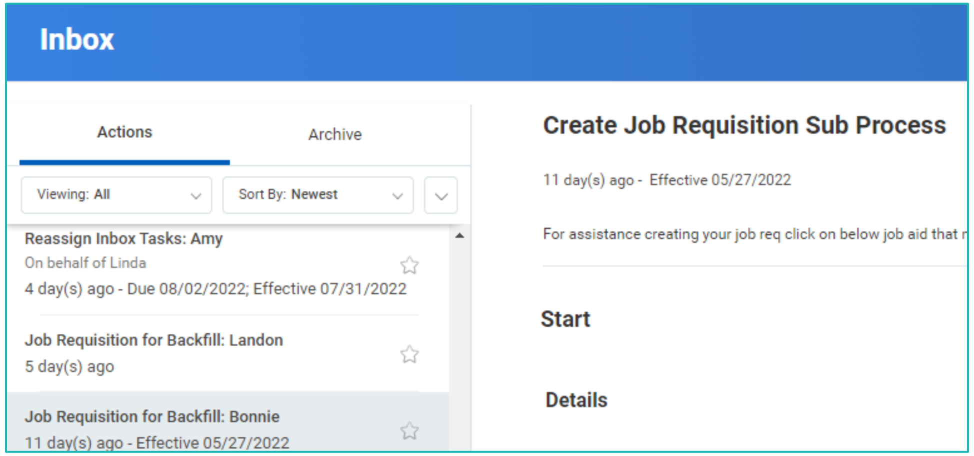
Review Documents



Evaluations

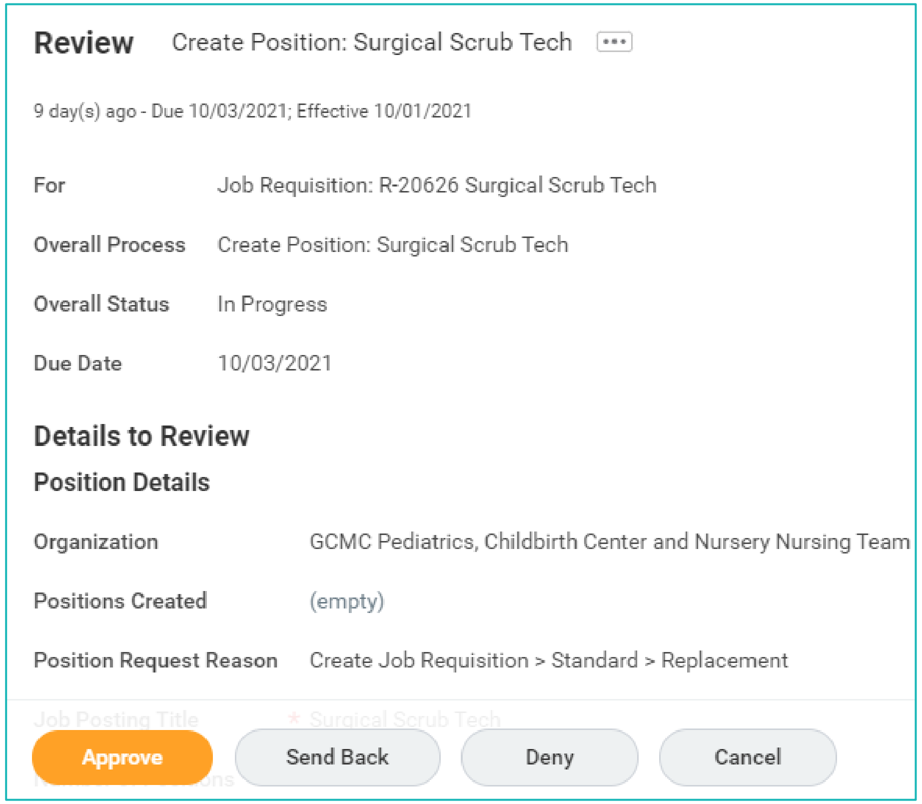


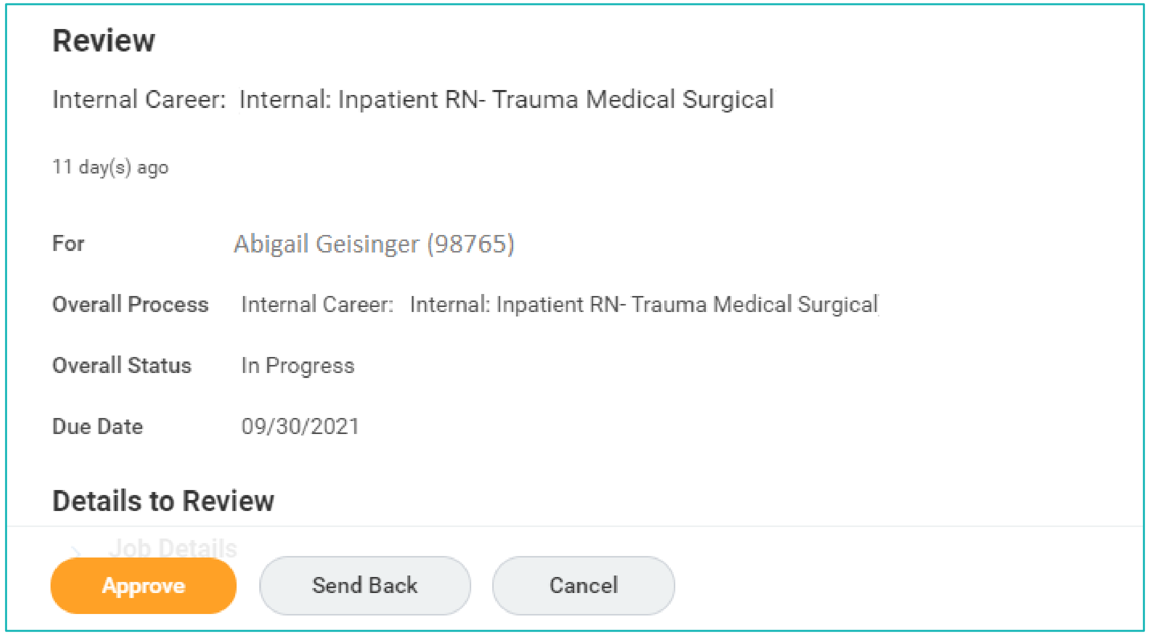
Sub Processes



Approvals

Here are a few examples of Approvals:



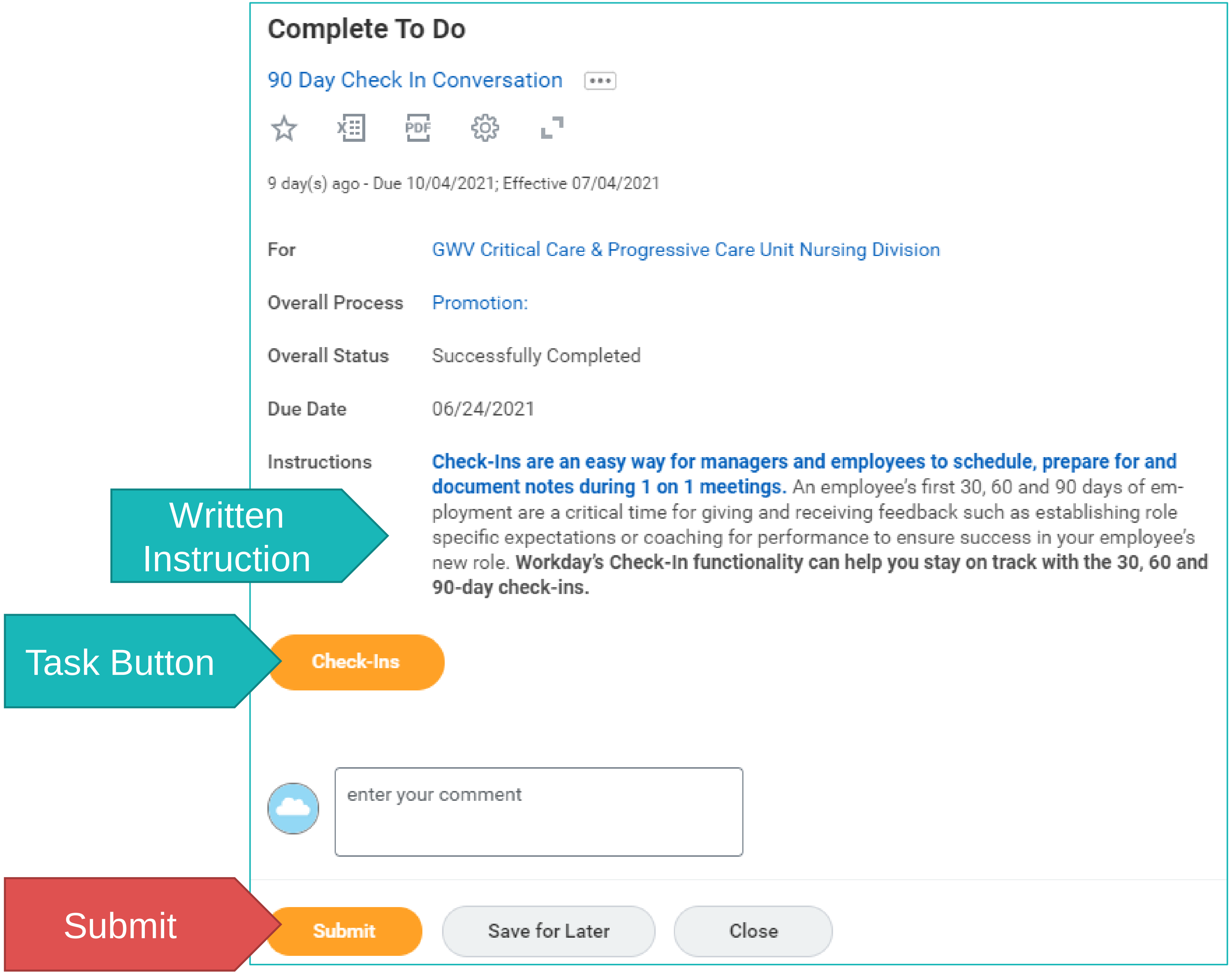


To Dos

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.

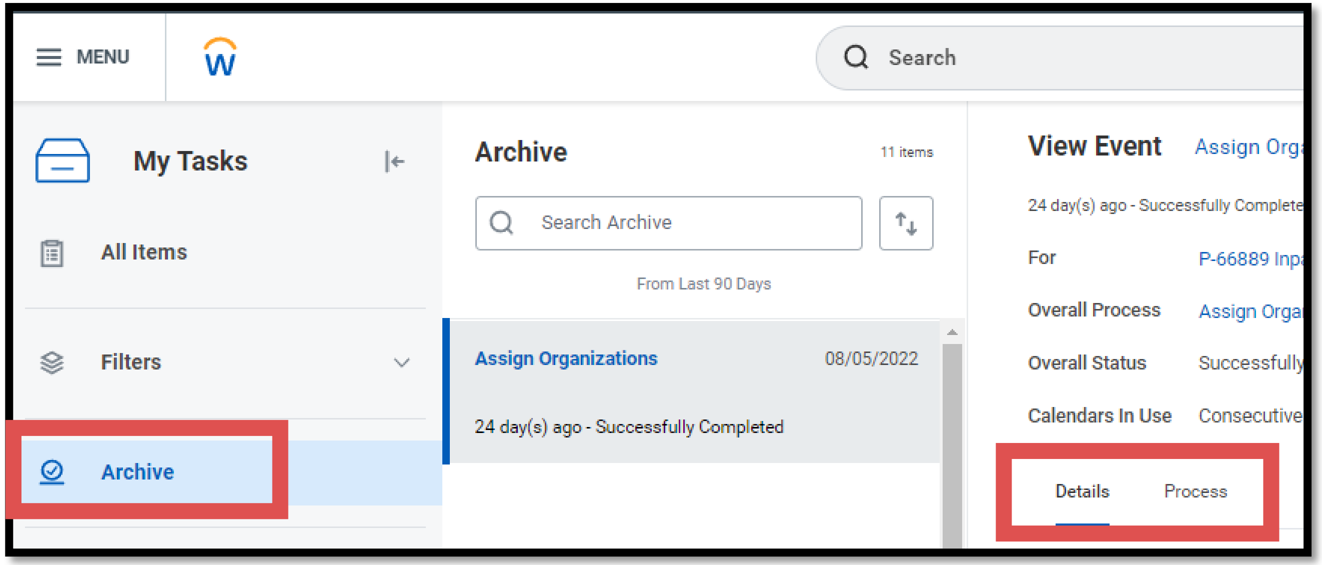
You may have been redirected to another task in Workday, so don’t forget to return to the inbox to click this button.



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.

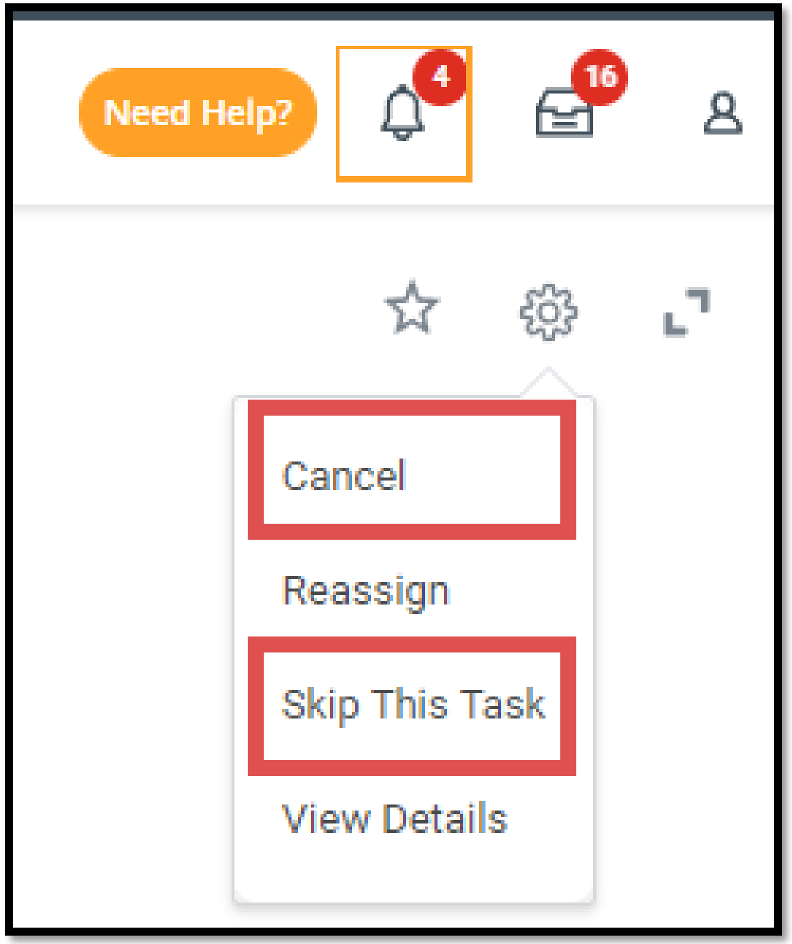
Frequently Asked Questions

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**

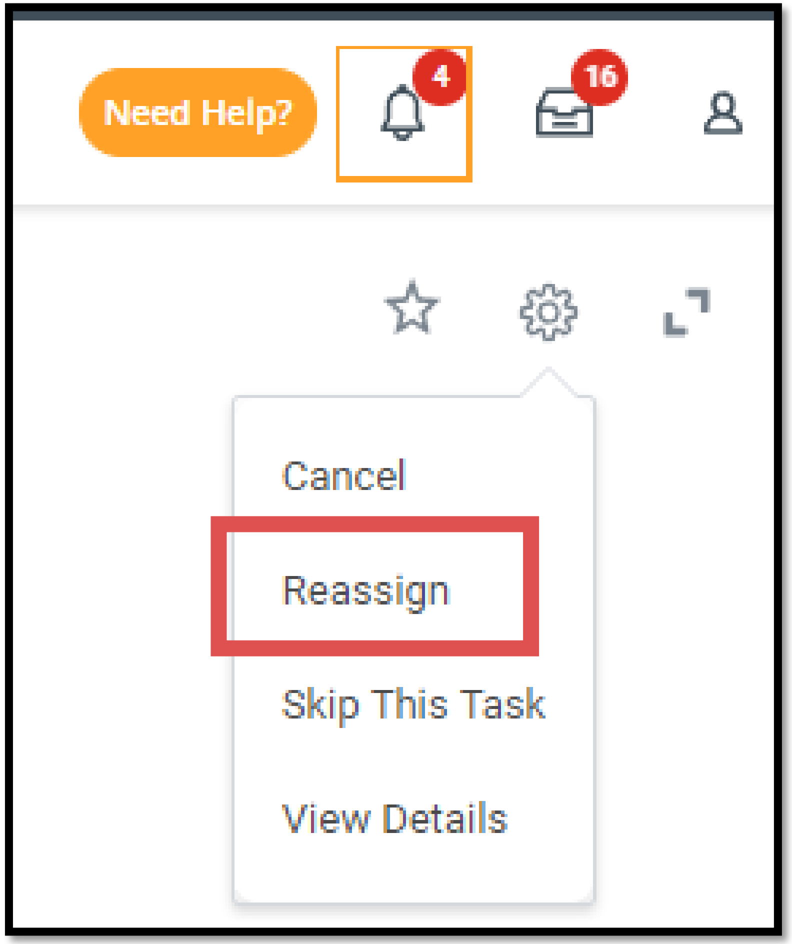
Note: if you don't have **Cancel**, **Skip This Task**, or **Delete Incomplete** as an option:

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 Button

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

OK Button

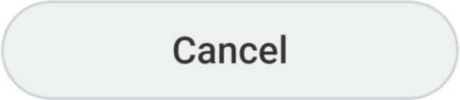
Used to accept and save your changes.

Next Button

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

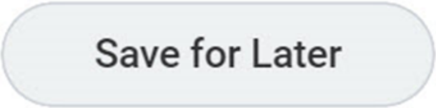
Done Button

Used to close a confirmation screen



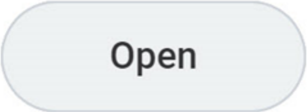
Cancel Button

Used to disregard a change.



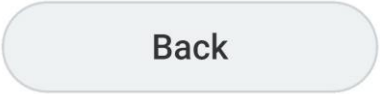
Save for Later Button

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



Open Button

Used to open the desired task.



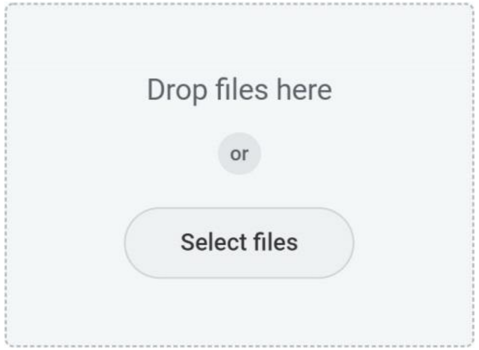
Back Button

Used to returns you to the previous page.

Data Input Buttons

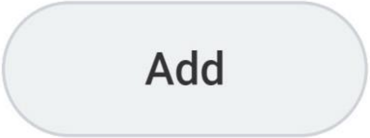
Progress Bar

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



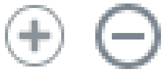
Attachments Icon

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.

Required Field Indicator

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

Prompt

Used to present a list of options for a specific field

Comments Icon

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

Edit Icon

Used to change information on the page.

Calendar

Used to open a calendar to select a date.

Questions?

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

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