




## WORKDAY WORKSHOP:

## INBOX MANAGEMENT

DURATION: 30 MINUTES



■ — Topics for today's workshop include:

- Notification Management
- Inbox Management
- Outlook Integration

## WORKSHOP TOPICS

# Always access Workday through the VUMC Network or VPN

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To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)



Workday times out after 1 hour

# Notification Management

# Notifications in Workday



Workday notifications allow the user to review items that do not require action. Typically, they notify the user whether an action has been completed by another user.

## Notifications

Viewing: All

Sort By: Newest

From Last 30 Days

Manager Evaluation: Disciplinary Action - Verbal:

Anita Knapp (1234567)

Employee has acknowledged their disciplinary action.

23 day(s) ago

To filter notifications, use the drop-down menus at the top of the screen.

To mark a notification as read, select the blue circle next to the notification.

# Inbox Management

# Inbox Items in Workday

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Items that are sent to your inbox typically require some kind of action on your part. Some examples of this include:

- Approvals
- Accounting Adjustments
- Candidate Screening
- Acknowledgements
- Evaluations
- Miscellaneous Payments
- Costing Allocations
- Disciplinary Actions
- Purchase Requisitions
- Etc.

# Inbox Items in Workday

**Inbox**

Actions      Archive

Viewing: All    Sort By: Newest

**Costing Allocation: Anita Knapp (1234567)**  
P00014457 Manager Translational Research    ☆  
13 day(s) ago - Effective 05/01/2023

**Costing Allocation: Walter Mellon (0123456)**  
P00014457 Manager Translational Research    ☆  
13 day(s) ago - Effective 05/01/2023

**Acknowledgment || Next Steps for Disciplinary Action: Manager Evaluation: Disciplinary Action - Verbal: Holly Wood (0012345)**    ☆  
18 day(s) ago - Effective 04/17/2023

**Acknowledgment || Next Steps for Disciplinary Action: Manager Evaluation: Disciplinary Action - Verbal: Dinah Mite (0001234)**    ☆  
18 day(s) ago - Effective 04/17/2023

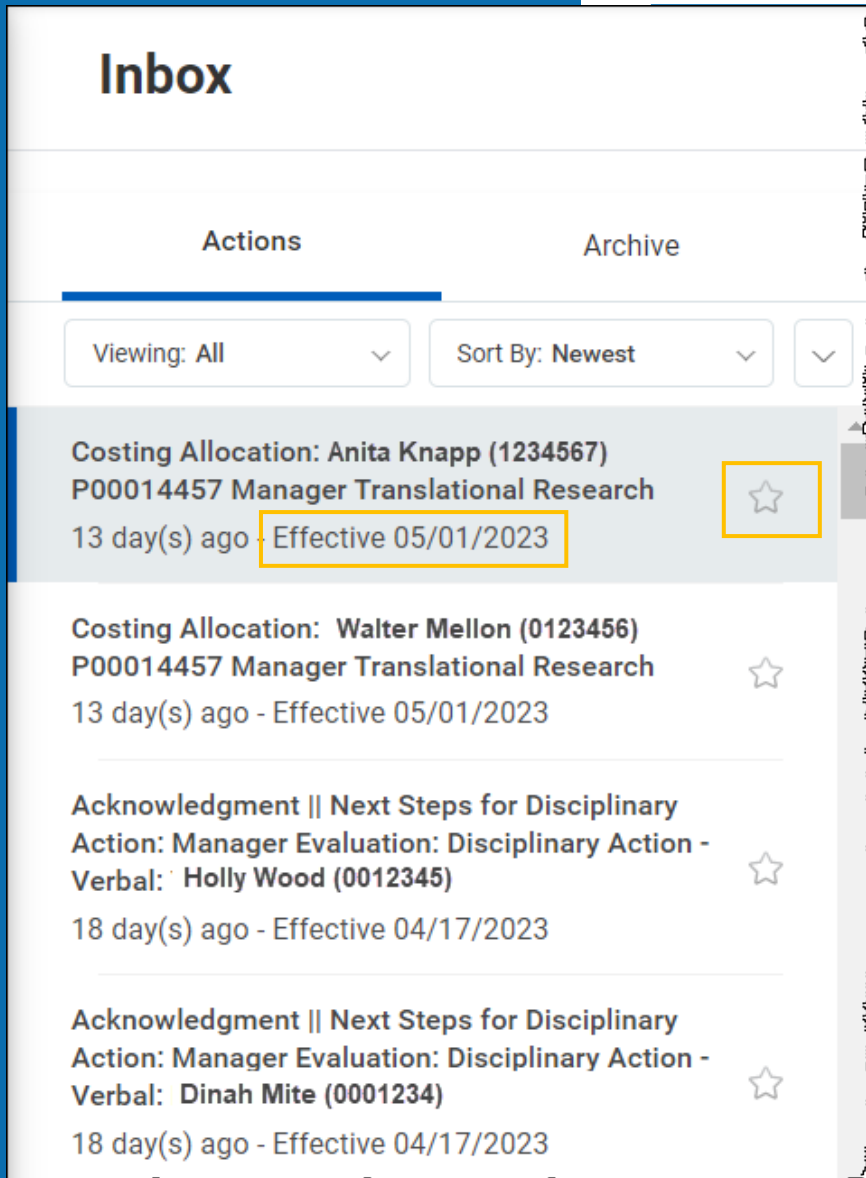
It is important that you check your Workday inbox daily, as certain processes will be held up if you do not act on your inbox items.

Inbox items can also get lost if the inbox is not properly maintained.





# Inbox Items in Workday



**Inbox**

Actions Archive

Viewing: All Sort By: Newest

Costing Allocation: Anita Knapp (1234567)  
P00014457 Manager Translational Research  
13 day(s) ago - Effective 05/01/2023

Costing Allocation: Walter Mellon (0123456)  
P00014457 Manager Translational Research  
13 day(s) ago - Effective 05/01/2023

Acknowledgment || Next Steps for Disciplinary  
Action: Manager Evaluation: Disciplinary Action -  
Verbal: Holly Wood (0012345)  
18 day(s) ago - Effective 04/17/2023

Acknowledgment || Next Steps for Disciplinary  
Action: Manager Evaluation: Disciplinary Action -  
Verbal: Dinah Mite (0001234)  
18 day(s) ago - Effective 04/17/2023

Use the **Star** icon next to each inbox item to mark it as important.

Dates will appear alongside the inbox item and due dates will appear for some items within the message.

# Inbox Items in Workday

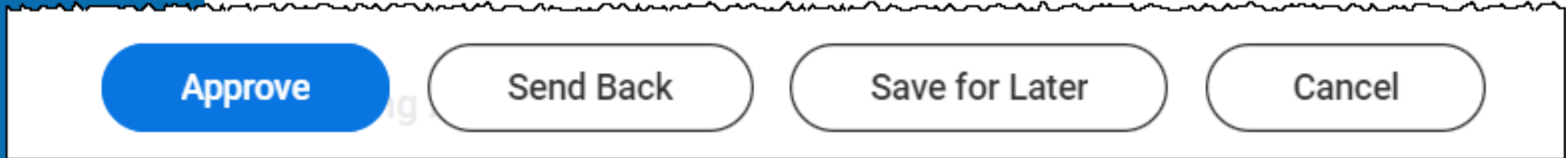
The screenshot displays the 'Inbox' interface. At the top left, the word 'Inbox' is written in a large, bold, black font. Below it, there is a section for 'Actions' with a yellow-bordered 'Archive' button. A blue bar highlights the 'Viewing: All' dropdown menu, which is open to show options: 'All', 'Favorites', 'Overdue', 'Delegated to Me', and 'Edit Filters' (which is highlighted with a yellow border). To the right, the 'Sort By: Newest' dropdown menu is open, showing options: 'Newest on Top', 'Oldest on Top', and 'Due Soonest on Top'. A third dropdown menu is open, showing 'Bulk Approve', 'Refresh', and 'My Delegations'. Below these menus, three inbox items are visible, each with a star icon on the right. The first item is from 'Mellon (0123456)' with the subject 'Action: Manager Evaluation: Disciplinary Action - Verbal: Holly Wood (0012345)' and is dated '18 day(s) ago - Effective 04/17/2023'. The second item is from 'Dinah Mite (0001234)' with the same subject and date. The third item is also from 'Dinah Mite (0001234)' with the same subject and date.

You can use the **Archive** button to review items that have been processed.

The **drop-down menus** will allow you to filter the inbox results.

Under **Edit Filters**, you can create a custom filter for easy access to certain business processes or filters for individuals.

# Inbox Item Approvals in Workday



Business processes like Costing Allocations, Expense Reports, Requisitions, etc., require approval by one or more managers.

The buttons above will appear when an approval is required.

Employees will only be notified if **Approve** or **Send Back** are selected.

# Inbox Item Approvals in Workday

Approve

Send Back

Save for Later

Cancel

**Approve:** Business process is approved and can move to the next step.

**Send Back:** Employee must make some changes to this business process before it can be approved. If using this option, please provide information on what changes need to be made in the comment field.

**Save for Later:** Item will remain in approver's Inbox.

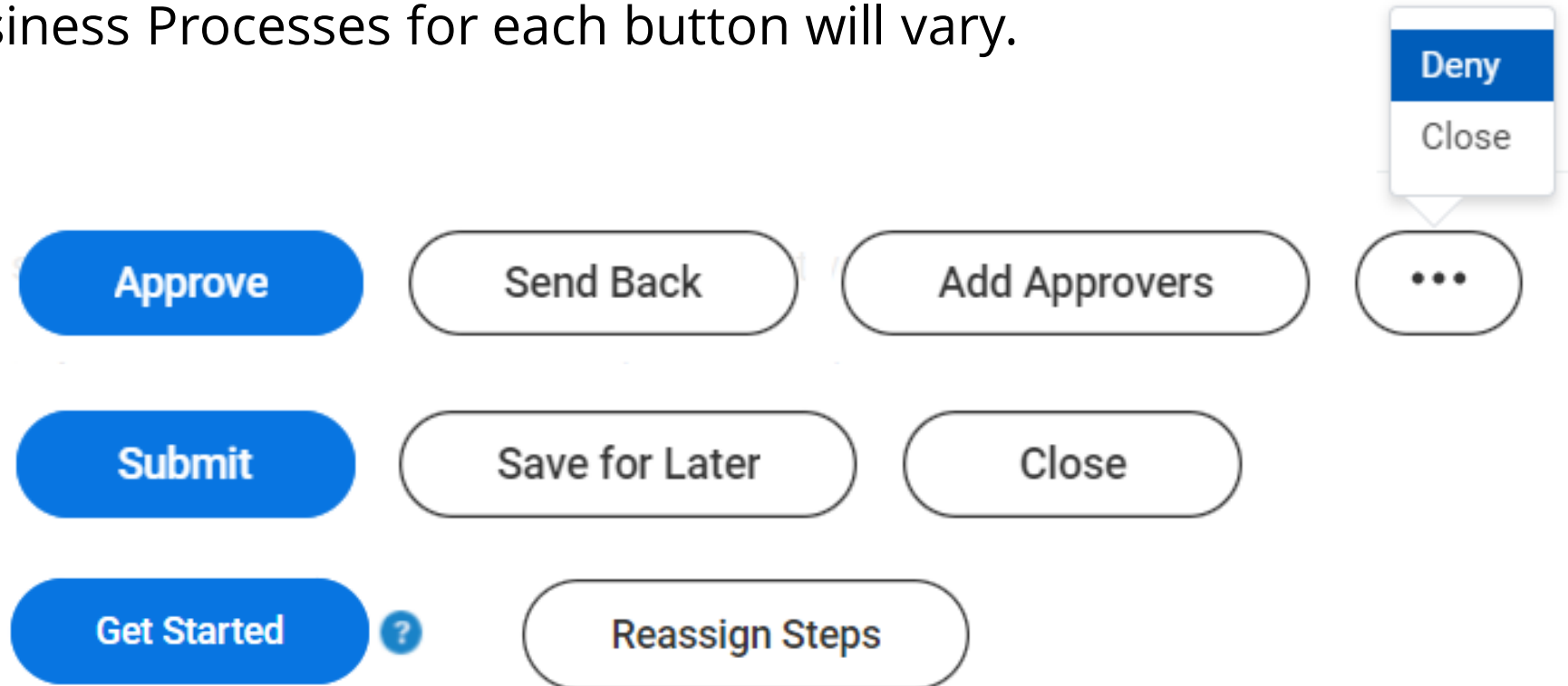
**Cancel:** Business process is canceled and cannot be retrieved.

# Other Action Buttons You May See

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Not all buttons are shown.

Business Processes for each button will vary.



# Notifications Demo

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*Demo*



# Outlook Integration

# Email Notifications Types

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There are three types of Workday-Generated email notifications:

<b>Informational Notifications</b>	Informational in nature; do not require the user to perform an action.
<b>Action Alert Notifications</b>	Generated when an action item appears for a user; required the user to log into Workday to perform an action
<b>Overdue Reminders</b>	Generated when an action item has passed its due date; reminds the user to log into Workday to perform the action.



# VUMC Workday Notifications

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Default setting for email delivery of Workday notifications will be a **Daily Batch**



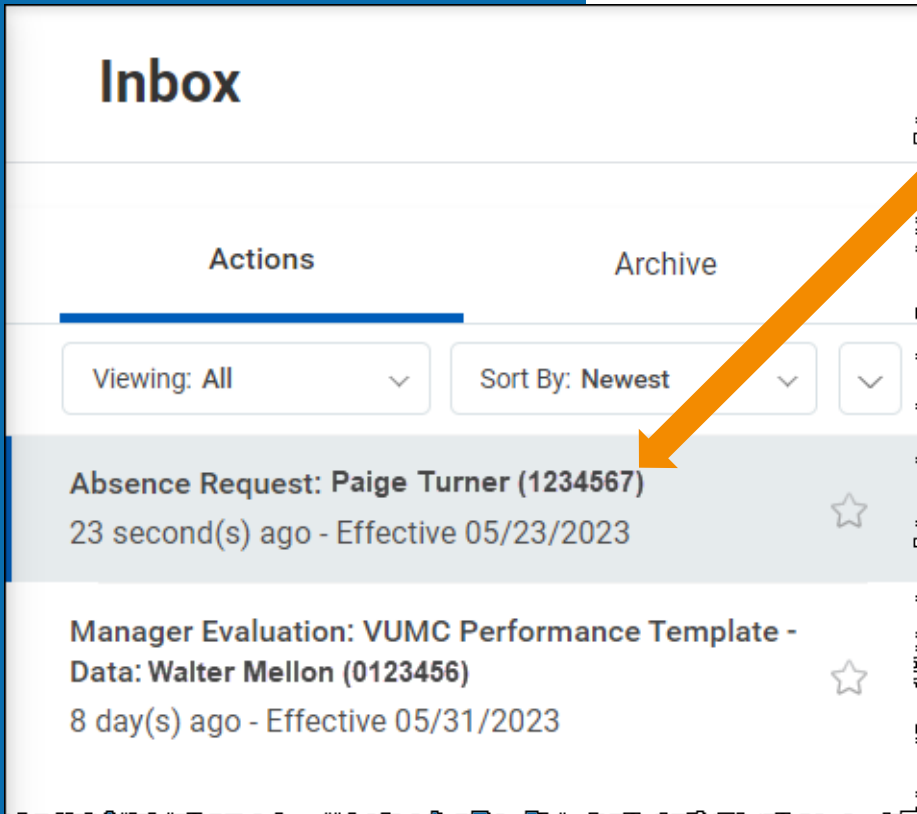
Users will be able to update preferences to **'Immediate'** for Action Items



Users will be able to update preferences to **'Immediate'** or **'Mute'** for Informational Items

# Workday → Outlook Integration

## Workday Inbox Notification



The screenshot shows a Workday inbox notification. At the top, it says "Inbox". Below that, there are "Actions" and "Archive" buttons. Under "Actions", there are dropdown menus for "Viewing: All", "Sort By: Newest", and another empty dropdown. The main content of the notification is an "Absence Request: Paige Turner (1234567)" which is "23 second(s) ago - Effective 05/23/2023". Below this is a "Manager Evaluation: VUMC Performance Template - Data: Walter Mellon (0123456)" which is "8 day(s) ago - Effective 05/31/2023". There are star icons next to both items.

## Outlook integrated email

**From:** VUMC Workday <[vumc@myworkday.com](mailto:vumc@myworkday.com)>

**Sent:** Wednesday, May 10, 2023 3:59 PM

**To:** Mellon, Walter <[walter.mellon@vumc.org](mailto:walter.mellon@vumc.org)>

**Subject:** Request Time Off for Turner, Paige - Successfully Completed

Time Off Request for Turner, Paige Successfully Completed . Please click the link below to view more details.

[Click here to view the notification details.](#)

This email box is not monitored. Please do not reply to this message.

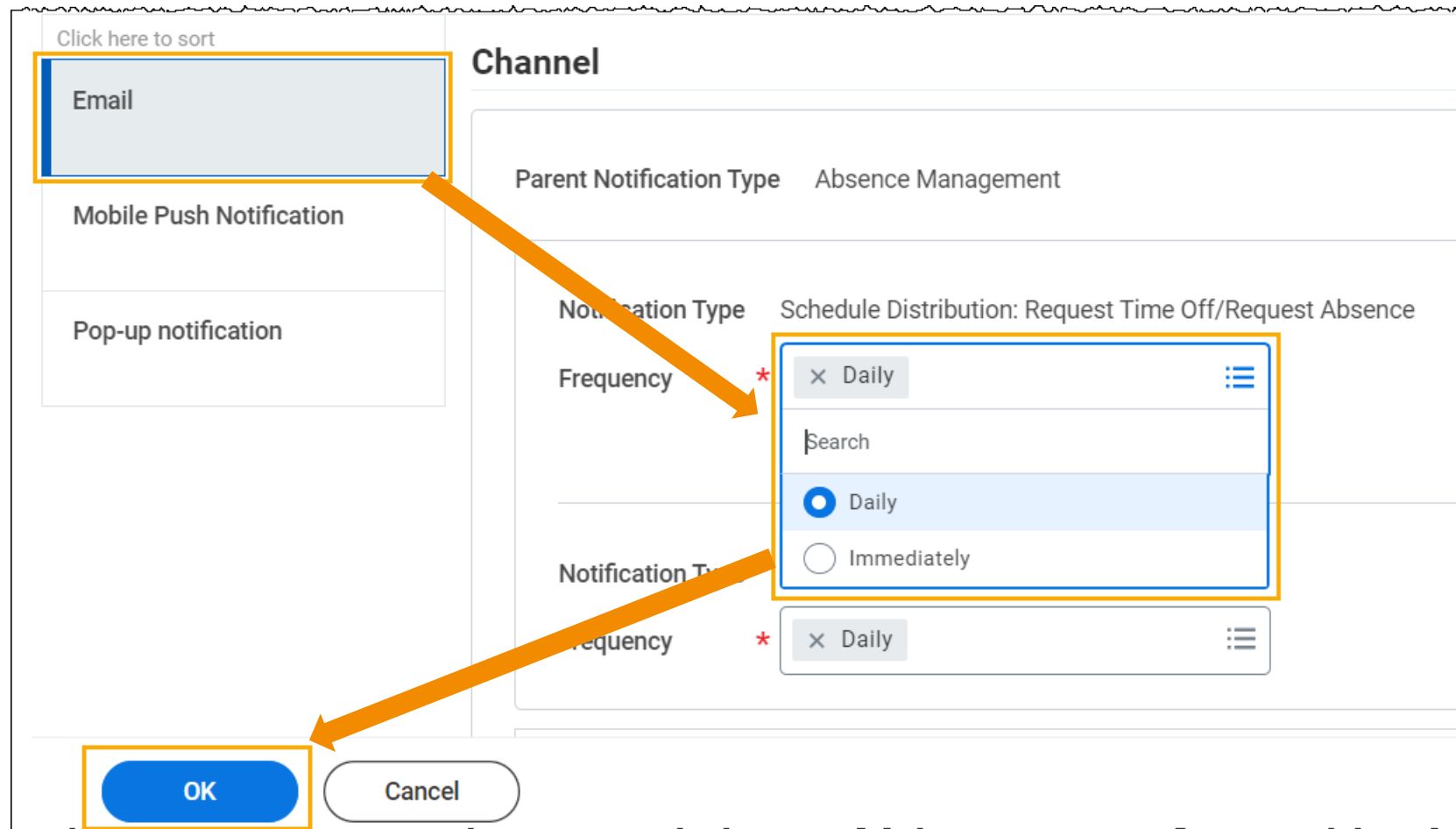
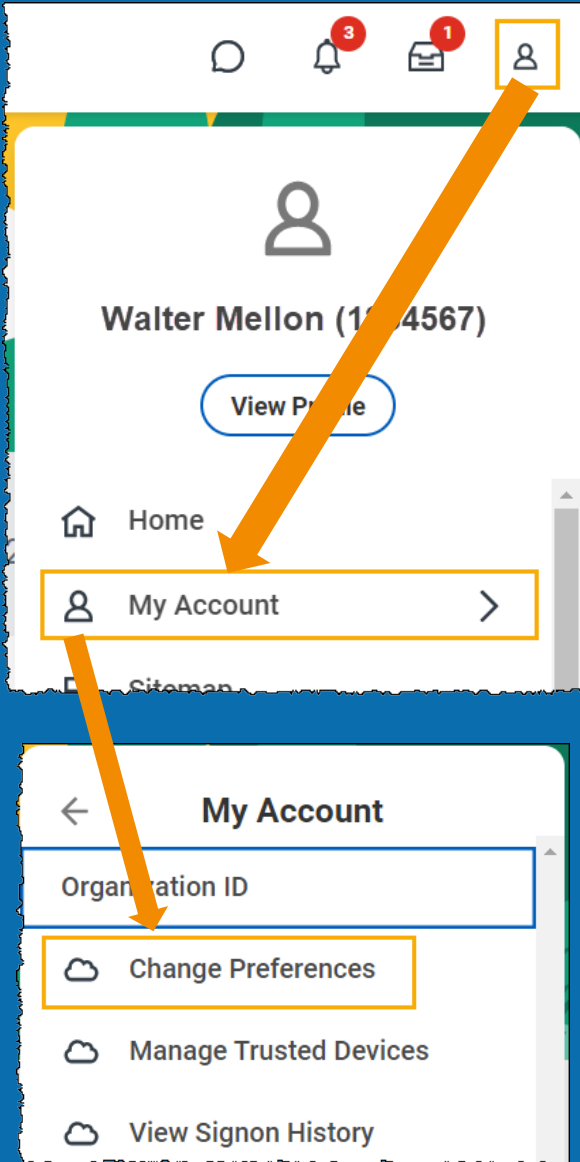


This email was intended for [walter.mellon@vumc.org](mailto:walter.mellon@vumc.org) · [Manage Preferences](#)



# Update Email Preferences

You can update the frequency of how often you receive some emails from Workday.



# Summary

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- Notification Management
  - Non-Actionable items
- Inbox Management
  - Actionable items
    - Check regularly
    - Tasks are held up in workflow
    - Filter inbox
- Outlook Integration
  - Actionable Workday tasks sent to Outlook email inbox
  - Update email preferences



Questions?

**Thank You**