workday. | **VUMC BUSINESS EDUCATION**

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

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

MW

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.

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.

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

MW

Inbox Management

Inbox Items in Workday

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
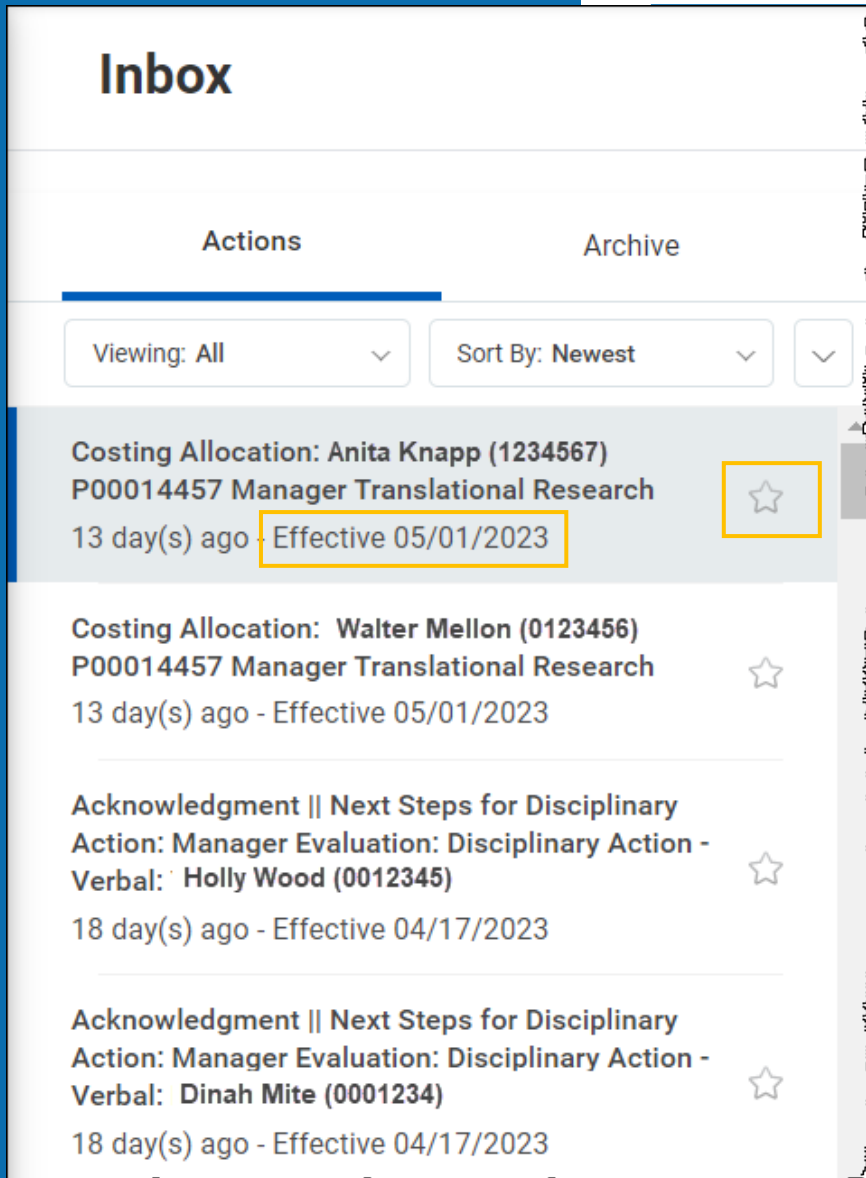- Etc.

Inbox Items in Workday

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

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.
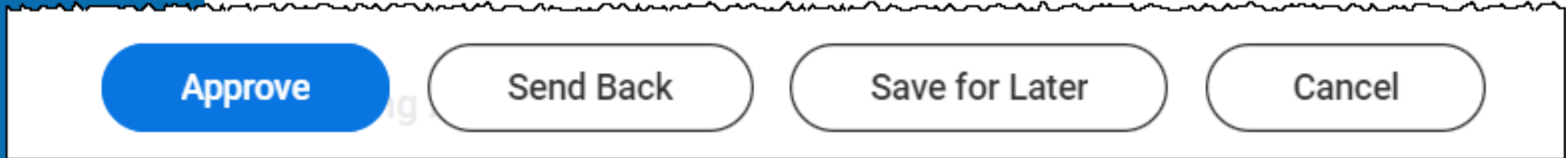
Inbox Items in Workday

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

| Approve | Send Back | Save for Later | Cancel |

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.

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Inbox Item Approvals in Workday

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.

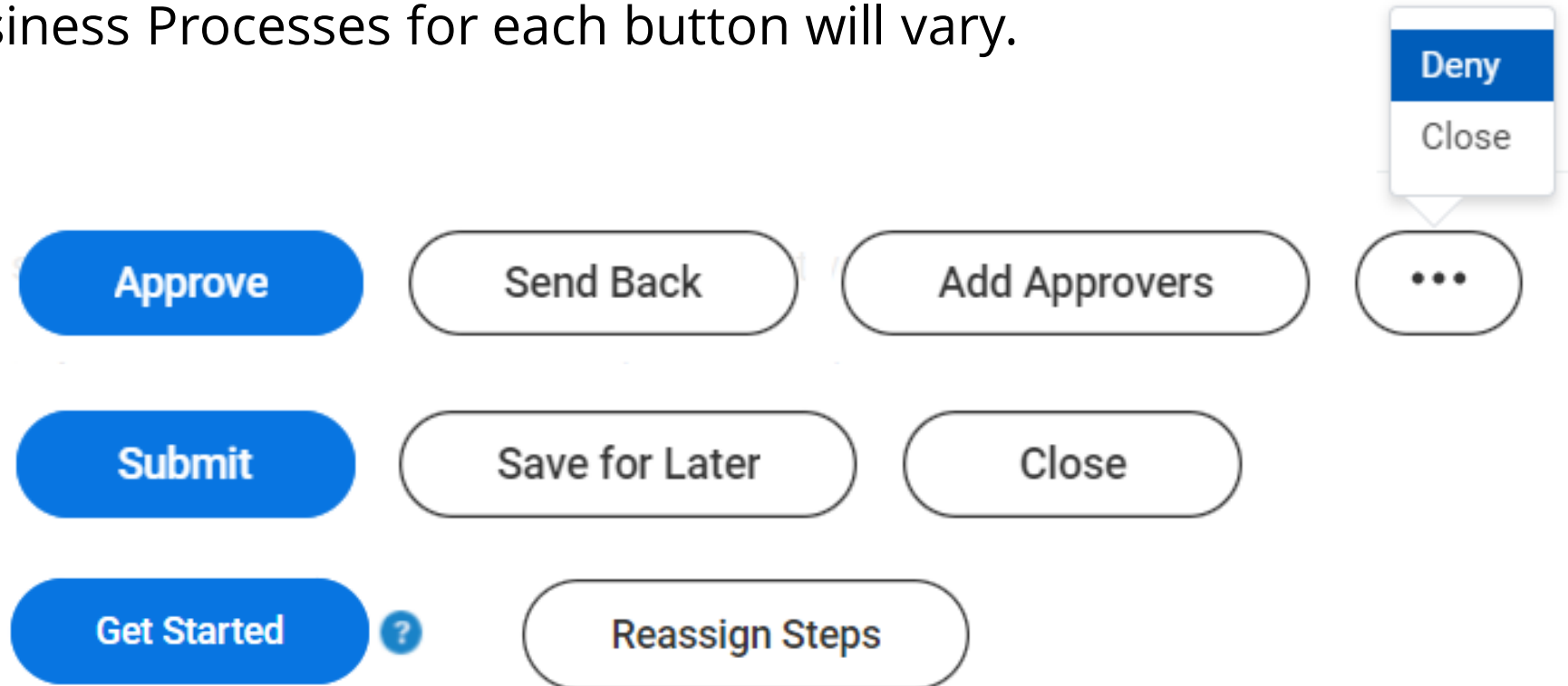**Save for Later:** Item will remain in approver's Inbox.

Cancel: Business process is canceled and cannot be retrieved.

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Other Action Buttons You May See

Not all buttons are shown.

Business Processes for each button will vary.

Deny

Close

Approve   Send Back   Add Approvers   •••

Submit   Save for Later   Close

Get Started ?   Reassign Steps

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Notifications Demo

Outlook Integration

Email Notifications Types

There are three types of Workday-Generated email notifications:

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

VUMC Workday Notifications

Default setting for email delivery of Workday notifications will be a **Daily Batch**
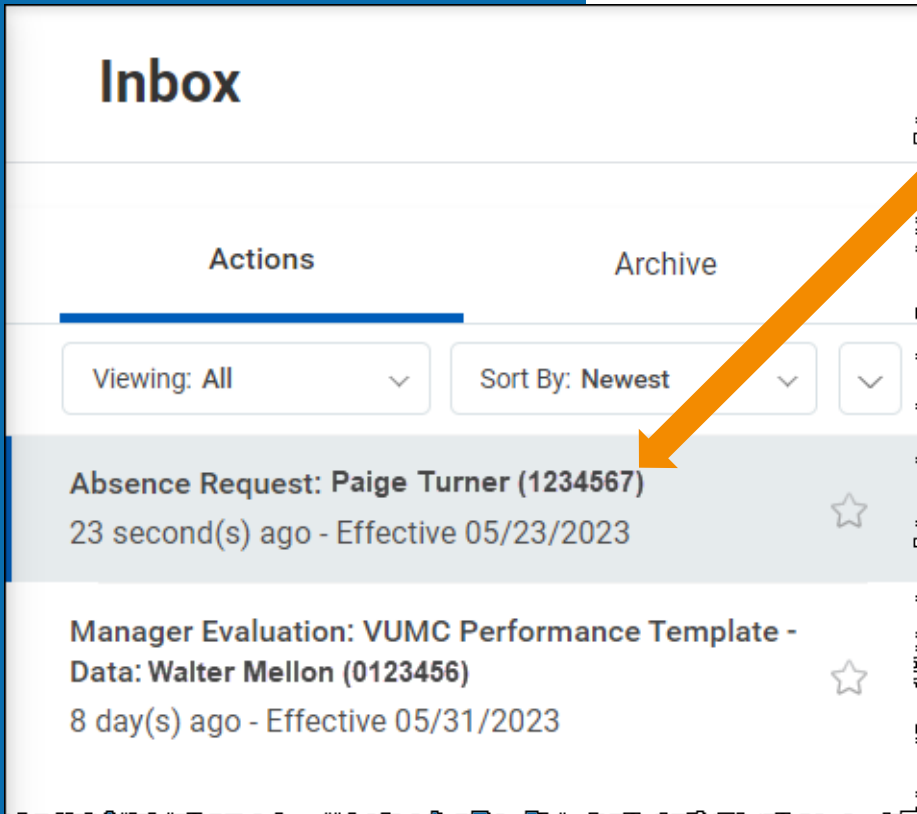
Users will be able to update preferences to **'Immediate'** for Action Items

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

Workday → Outlook Integration

Workday Inbox Notification

Outlook integrated email

Inbox

Actions   Archive

Viewing: All   Sort By: Newest

Absence Request: Paige Turner (1234567)
23 second(s) ago - Effective 05/23/2023

Manager Evaluation: VUMC Performance Template -
Data: Walter Mellon (0123456)
8 day(s) ago - Effective 05/31/2023

From: VUMC Workday <vumc@myworkday.com>
Sent: Wednesday, May 10, 2023 3:59 PM
To: Mellon, Walter <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.

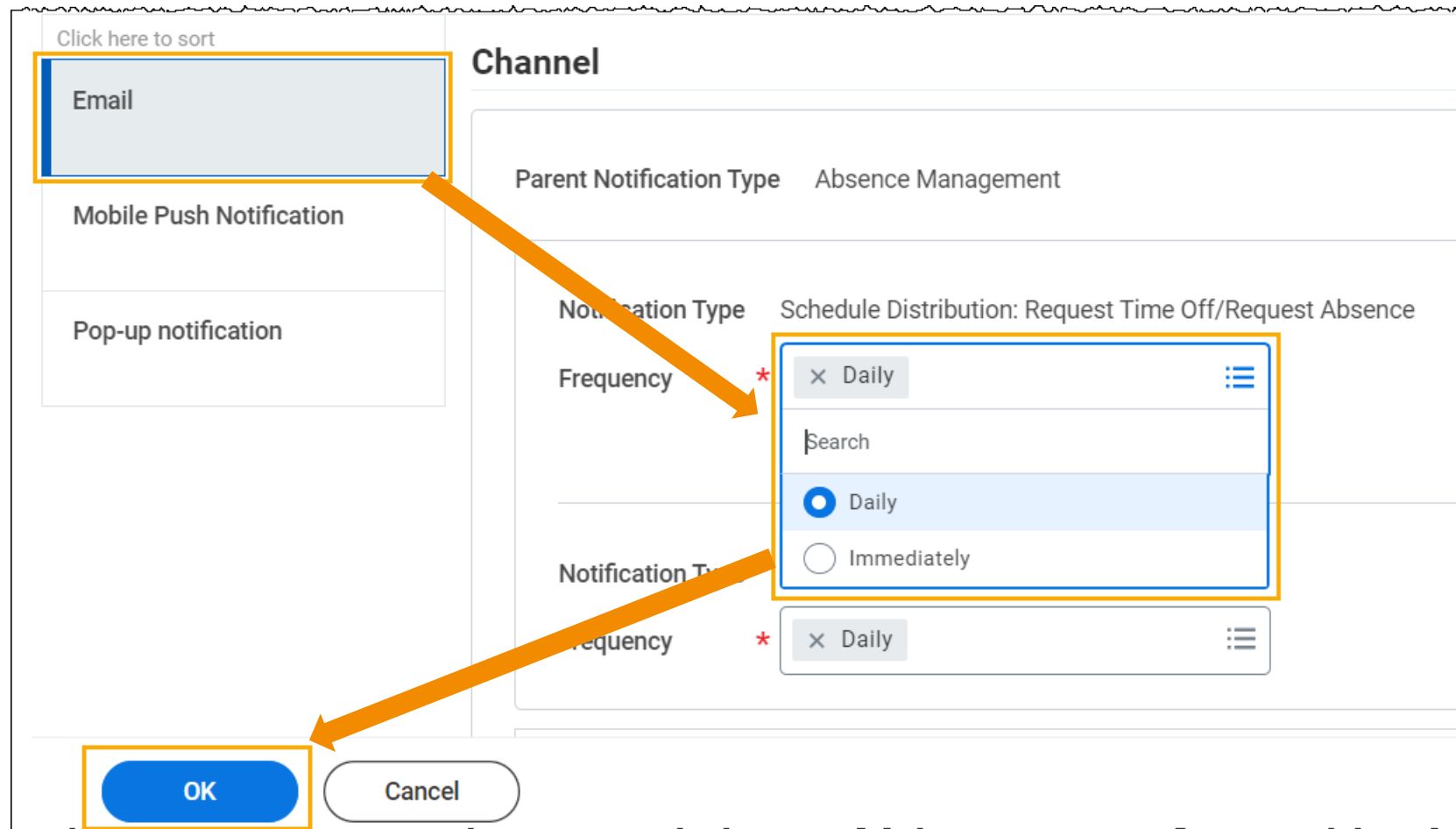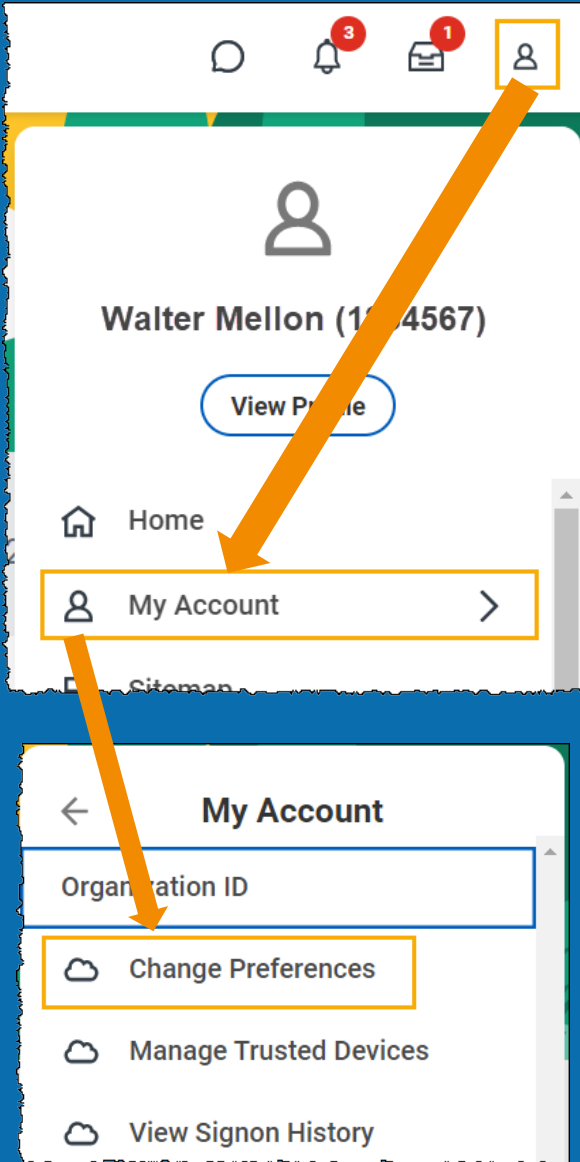This email box is not monitored. Please do not reply to this message.

workday.

This email was intended for walter.mellon@vumc.org · Manage Preferences

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Update Email Preferences

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

Summary

- 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