



Workday Notification Designer

Product Summary

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Summary of User Guide Changes - Notification Designer

This table describes updates to the User Guide within the past year. We update the User Guide when new features impact the product user interface and when editorial changes improve content quality.

This page is intended to be a summary of content changes in the User Guide, and is not a full list of new features. If a new feature results in a change to only the Administrator Guide content, that change isn't described here.

To find complete information about new features, you can run the What's New in Workday report on your Workday system if you have access to the report.

Date	Notable Content Changes
March 2023	Transitioned the Workday User Guide from PDF to HTML format. Added information about: - Using notification templates for the Change Job business processes. - Moving content containers from one location to another within the same notification template. - Setting categories in the notification template to specify the types of notifications that can use the template.
September 2022	Added information about using notification templates for the Manage Recruiting Campaigns task and Onboarding, Hire, and Refer a Candidate business processes.
March 2022	Added information about using notification templates for student messages. Clarified information about activating a notification template with a data row.

Concept: Notification Designer

Notification Designer enables you to create and manage the layout, design, and content of a notification template that you use when sending notifications for specific tasks and custom notifications for business processes. You can create multiple notification templates for each type of notification and the notification templates can be used as alternatives to an email template.

With Notification Designer, you can create a new notification template from Drive and then:

- Select a prebuilt notification layout or design your own.
- Add text, images, buttons, dynamic data rows, and other content areas, and format those areas.
- Share the notification template with others.
- Collaboratively edit the notification template with others who have edit access.
- Publish a notification template so that it can be used when sending notifications.
- Set notification categories to specify the types of notifications that can use the template.

Dynamic Content in Notification Templates

You can insert various types of dynamic content as data rows in notification templates. The task or business process that initiates a notification determines the values in the data rows when the notification is sent. Because some data rows are exclusive to specific types of notifications, a notification template can

include only 1 data row at a time, and the type of data row included determines the type of notification that can use it.

Example: In order for an **Invite to Apply** task to use a notification template, that notification template must include an Invite to Apply data row. Additionally, a notification template that includes an Invite to Apply data row isn't available for use in any type of notification except one from an **Invite to Apply** task.

Collaboration

Notification template owners can share notification templates with other users who have access to Notification Designer to collaborate on the content. When more than 1 user simultaneously views or edits a notification template, Notification Designer assigns a different colored avatar for each user and displays the avatars above the template.

Notification Template File Downloads

You can download a notification template as an NDXF file type and save a local copy of it as a backup. To download the template, from the **File** menu of a notification template, select **Download As > Notification Template (.ndxf)**. You must be the owner of the template or have **Can Edit** permission to download it.

A saved NDXF file can be uploaded to a different tenant, if needed. Before you can upload it, access the **Edit Tenant Setup - System** task. In the **System Setup** section under **File Type Setup Instructions**, make sure all file types are supported, or add NDXF to the list of supported file types for that tenant. Then, from Drive in the destination tenant, select **Add New > Upload** and navigate to the NDXF file.

You can also migrate notification templates and their dependencies between tenants using Object Transporter (OX) 2.0.

Language Layouts for Translated Content

You can design and customize content for multiple target languages within a single notification template. Select the base language of a notification template when you create it, and after you add content, select **Language > Add Language** to add a layout you can customize with translated text and images. Languages that are available to add are defined in the **Languages** section on the *Edit Tenant Setup – Global* task.

Each new layout that you add to the notification template inherits the content present in the base layout at the time you add the language. You can customize the content in each layout by adding translated text, replacing images, setting fonts, and changing colors. You must add new containers and data rows directly to the base layout for changes to apply to all other languages.

When a notification template is published, all of the language layouts are published too. If you don't add a layout for a recipient's language in the notification template, notifications will be sent using the base language.

Create and Activate Notification Templates

Prerequisites

Security: These domains in the System functional area:

- Drive
- Notification Designer

Context

You must create a notification template, publish it, and enable it for specific notification types before you can use it in an email notification. Users who have access to a task or business process that sends

notifications can view and select only the notification templates that are available for that specific task or business process.

Steps

1. From Drive, select **Add New > Notification Template** and name the template.
2. Select a layout with the components that you need or build your own.
Some of the layouts include a data row supported by specific notification categories. Layouts that don't include a data row are supported by all notification categories.
3. Insert content, such as images, text, buttons, data rows, and social media icons, by clicking the **+** icon along the border of existing content containers.
Note: Some elements of email notifications (such as text and buttons) might look different to the recipient depending on the email client.
See [Concept: Editing Notification Templates](#) on page 7.
4. (Optional) Add language layouts for the template by clicking **Language > Add Language**.
Each layout you add to the notification template inherits the content present in the base layout at the time you add the language. You can customize the content in each layout by manually adding translated text, replacing images, setting fonts, and changing colors. You must add or delete containers and data rows directly from the base layout for changes to apply to all other languages.
5. Click **Publish** to make the notification template available for use in a new notification.
You can click **Edit** and make changes to the template but you must publish the template again to apply those changes.
6. Click **Set Category** in the **Template Details** panel to add one or more notification categories and specify the types of notifications that can use the template. If the template includes a data row, only categories that support that data row display.
7. (Optional) Click **Maintain** (or use the **Maintain Notification Templates** task) to add or remove the notification categories for multiple templates at a time. If the template includes a data row, only categories that support that data row display.
A template can be enabled for multiple categories at the same time, and a category can support multiple notification templates at a time.

Result

You can select a notification template from a prompt when sending notifications for the following:

Business Process Custom Notifications:

- **Add, Edit, and Copy** custom **Workflow Notifications**.

HCM - Core

- **Message Workers** task

HCM - Recruiting:

- **Invite to Apply, Send Message, Prospect Consent Collection, and Manage Interview Scheduling Settings** tasks.
- **Manage Recruiting Campaigns** in the Candidate Engagement functional area.
- **Job Alerts** available when using the Internal Career Site and External Career Site tasks.

Student:

- **Create Student Message** and **Edit Student Message** tasks.

Concept: Managing Notification Templates

This table summarizes some of the actions that you can take with notification templates. Users must have access to the *Drive* domain to create, copy, share, and delete notification templates.

Action	Description
Create a notification template	From Drive, select Add New > Notification Template .
Copy a notification template	From Drive, select the notification template and click Make a Copy . Copying a notification template from Drive creates a new, unpublished template.
Share a notification template	From Drive, or from an open notification template, select Share . When you share a notification template you can: • Enable link sharing and provide the URL to multiple users at once. • Select specific users, or groups, to share with. • Select a permission level for the actions that users can do. Note: The ability to use group sharing is a system setting that requires additional Drive configuration. When you share a notification template with a specific user, Workday sends a notification and an email (if the Workday administrator enabled email notifications). When you enable link sharing and provide a URL, or when you share with a group, Workday doesn't send notifications.
Remove (move to Trash) a notification template	From Drive, select the notification template and click Remove . You can't permanently delete notification templates; they remain in Trash . Removing a notification template from Drive won't delete the published version of the template. Note: If you move a notification template to Trash you can no longer edit it, enable it for notification categories, configure it for use in notifications, or select it for ad hoc messages such as Invite to Apply and Send Message. However, templates previously configured in instances such as Job Alerts and custom notifications for business processes will continue to use the published template unless you replace it with a different notification template.
Restore a notification template from Trash	From Trash in Drive, select the notification template and then click Restore . Workday places the restored notification template in My Files . You can restore a notification template only if you're the person who created it. If you remove a notification template that was shared with you but you're not the owner, you remove your access to the notification template. The notification template disappears from Drive and it doesn't display in Trash .

Concept: Editing Notification Templates

This table summarizes some of the actions that you can take within notification templates. Users must have access to the *Notification Designer* domain to create, edit, publish, and activate notification templates.

Action	Description
Select a template layout	You can select a layout with the components you need or build your own. Some of the layouts include a data row supported by specific notification categories.
Add message content	You can't add message content directly in a notification template, but you can manage the font, text color, and link color in the Settings panel. You can create message information in the Message Template (for Recruiting tasks) and the Message Body (for custom business process notifications). Workday populates the Message Body Placeholder container with the message template or body text when sending a notification.
Edit the default font and color	You can change the font and the default text, link, and background colors for the notification template in the Settings panel.
Create a content container	Hover over an existing content container and click the + icon on the top, bottom, left, or right border. To delete a content container, hover over it and click the trash can.
Move a content container	Hover over an existing content container, click the Move icon, and drag it to an available, highlighted location. When moving content in a data row, all containers in the row move together.
Add a header or footer	To create a header, hover over a content container and click Image or Text. You can't add a footer directly in a notification template. You create footer information in the Email Compliance section of the Edit Tenant Setup - Notifications task.
Add an image	Hover over a content container, click Image, and navigate to the image. Use the Image Properties panel to resize the image, add a link, or add color. Image file types .jpeg, .jpg, and .png are supported. Images are limited to 1 MB in size.
Add text	Hover over a content container, click Text, and type the text to add. Use the toolbar and the Text Properties panel to select styles, formats, bullets, numbers, links, and colors.
Add a button	Hover over a content container and click Button. Use the Button Properties panel to select the button shape, color, and link.
Add a data row for dynamic content	Hover over a content container, click More , and select a type of data row.

Action	Description
	Use the Button or Text Properties panel to select button shape, formats, and colors. A notification template can include only 1 data row at a time.
Add social media icons	Hover over a content container, click More , and select Social Icons . Use the Social Icons panel to show or hide specific icons and add links. A notification template can include only 1 set of social media icons at a time.
Add a divider	Hover over a content container, click More , and select Divider . Use the Divider panel to select the line style, color, and weight.
Publish a notification template	Click Publish to make the notification template available to be used in a notification. To edit a published notification template, click Edit . Click Publish again to apply changes and have them take effect. Published versions of notification templates can differ from the notification templates in Drive that have saved changes.
Preview a notification template	Click Preview and select either the desktop or mobile icon to preview notification template content before you send it to recipients. Use the View Published toggle to compare content edits to the published version of the template.
Enable notification categories	Click Set Category to manage notification categories for a published template. You can either add categories or remove categories previously set. If the template includes a data row, only categories that supports that data row display. You can also click Maintain (or use the Maintain Notification Templates task) to set categories for multiple templates at a time. Notification templates with a data row can only be enabled for the notification types that support that data row.

Reference: Notification Template Actions Available Based on Permissions

This table summarizes the actions available for notification templates based on the user's permission level. You specify permission levels when you share a notification template.

Action	Can View Permission	Can Edit Permission	Owner
View a notification template.	X	X	X
Copy a notification template. (Applies to Can View permissions only if the notification template owner selected the Commenters and viewers	X	X	X

Action	Can View Permission	Can Edit Permission	Owner
can copy, download, and print option when sharing the notification template.)			
View a list of specific users the notification template is shared with.	X	X	X
Remove (self) from shared notification template access.	X	X	
Share a notification template or change share permissions. (Applies to Can Edit permissions only if the notification template owner selected the Editors can share option when sharing the notification template.)		X	X
Edit content.		X	X
Rename a notification template.			X
Remove a notification template and restore it from Trash.			X