My Tasks

The role(s) needed to perform these tasks is / are:

- Employee

The design and appearance of Workday may be different than some of the visual components described within the job aid due to system updates.

My Tasks

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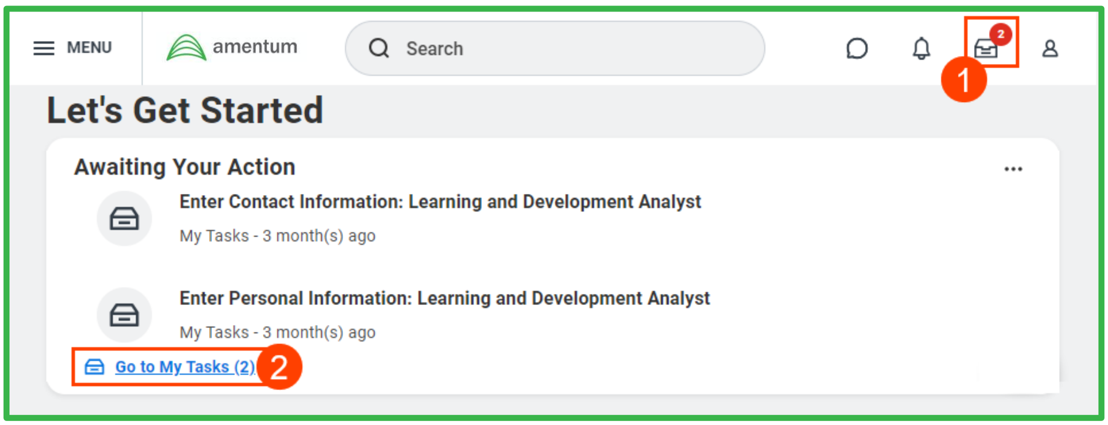
My Tasks, previously known as the Workday Inbox, makes it easy to filter, sort, and search for tasks requiring action. The My Tasks interface makes it simple for you to find and complete your outstanding tasks. The advanced searching and filter options are valuable for users with a high volume of tasks.

> Some labels and reports in Workday, as well as some Workday job aids and videos, still refer to the Inbox rather than My Tasks. These references will be updated on an ongoing basis.

Accessing My Tasks

My Tasks can be accessed in two ways:

1. The **My Tasks icon** in the top right corner of any Workday screen.
2. The **Awaiting Your Action card** on the Workday homepage.



My Tasks Navigation Panel

The items available in the My Tasks navigation panel are described in the sections below. The Navigation Panel is collapsible, giving you more screen space to act on your tasks.

1. ***All Items***

   All Items allows you to see all pending tasks currently assigned to you. To act on a task, click on the task name to open in in the central panel. You can mark an item as a **Favorite** by clicking the **Star** for the task to add it to the **Favorites** filter for quick access. You can also **Search** for tasks using the **Search: All Items** feature and **Advanced Search.**

2. ***Saved Searches***

   After completing a search, you can save your search parameters for future searching. When you save a search, you will provide a search name. To see your **Saved Searches**, click the **Expand Arrow** next to **Saved Searches.** To perform a **Saved Search**, simply click on the name.

> You can only save a search from the **All Items** tab in the **Navigation Panel.**
>
> Refer to the My Tasks Search section for more information about searching.

My Tasks

3. *Filters*

Filters can help you organize your tasks by specific criteria and are managed from the **Navigation Panel.** To see the available **Filters**, click the **Expand Arrow** next to **Filters.** There are three default filters available: **Favorites**, **Overdue**, and **Delegated to Me.**

To add additional filters, click **Manage Filters** in the Navigation Panel and then click the **Create Inbox Filter** button. Enter your desired filter criteria and click **OK**. When you create a new filter, it automatically appears in the **Filters** area of the **Navigation Panel** for access.

> Note: you cannot save searches from the Filters tab.

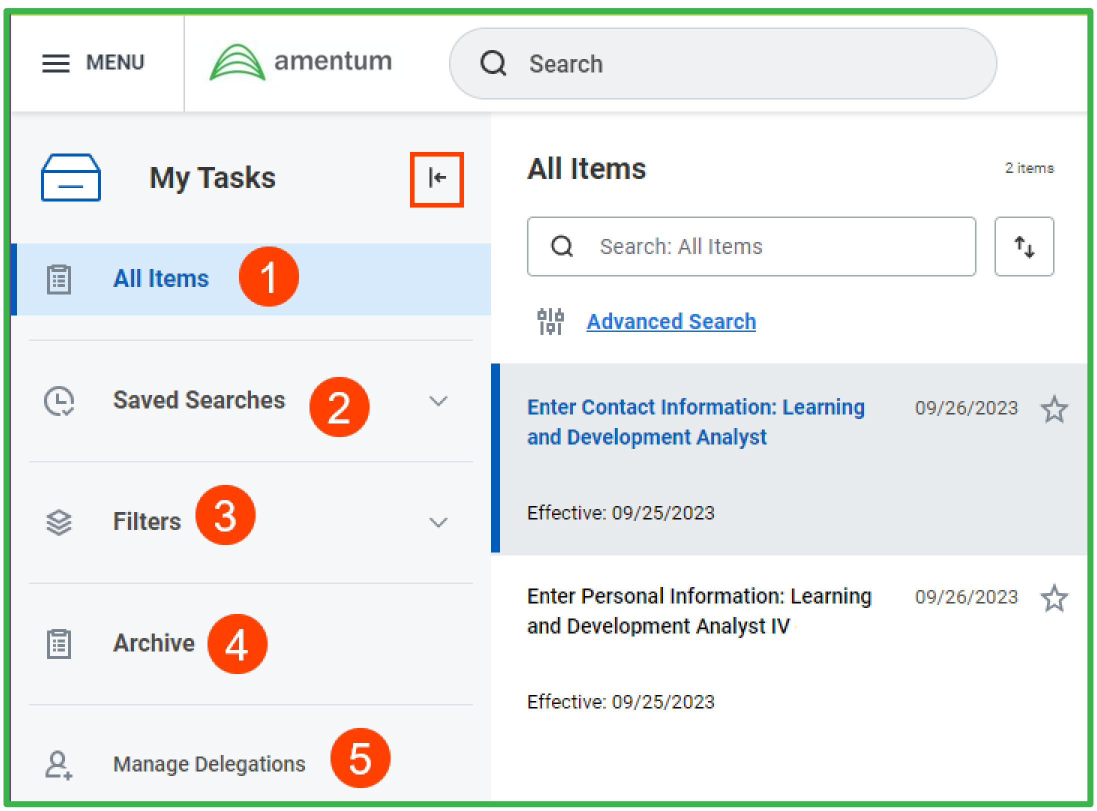
4. *Archive*

Archive displays tasks that you resolved in the last 90 days. Searching and sorting are available for archived tasks.

> Note: you cannot save searches from the Archive tab.

5. *Manage Delegations*

Manage Delegations provides quick access to the **My Delegations report** to view and manage your task delegations. Delegations should be set anytime you will be unable to take action on your tasks and approvals, such as when you are on PTO, on business travel, or for some other reason are not able to take action.



My Tasks

Display Options

You can use the **Sort By**, **Display Density**, and **Date View** options to set your sort and view preferences. The **Display Options** are viewable in **All Items**, **Saved Searches**, **Filters**, and **Archive**.

1. ***Sort By***

   The **Sort By** option allows you to customize the order in which tasks are displayed. There are three **Sort By** options:

   1. **Newest on Top** – shows the most recent task first.
   2. **Oldest on Top** – shows the oldest task first.
   3. **Due Soonest on Top** – shows tasks with a due date first with the one due first, listed first.

2. ***Display Density***

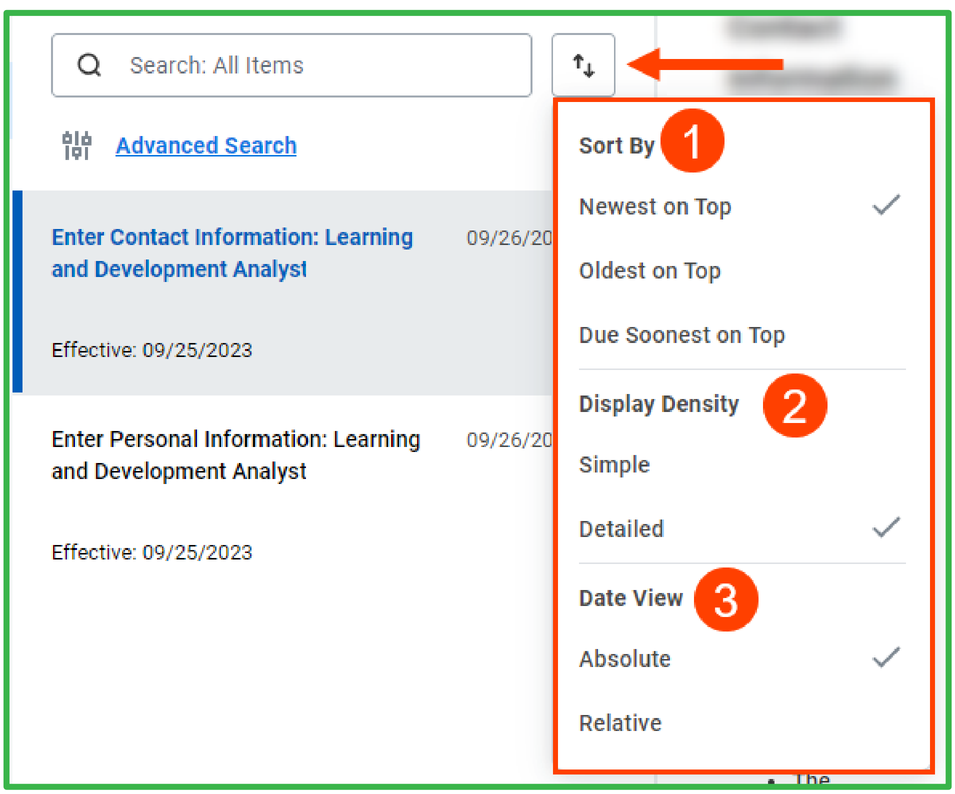
   The **Display Density** option allows you to customize how much information is displayed with tasks. There are two **Display Density** options:

   1. **Simple** – simplifies the selection meu to include only the task name.
   2. **Detailed** – provides additional information in the selection menu, including the Due and Effective dates.

3. ***Date View***

   The **Date View** option allows you to customize how you want to view the date a task was assigned. There are two **Date View** options:

   1. **Absolute** – displays the exact date when the task was received.
   2. **Relative** – displays the time elapsed since the task was received.



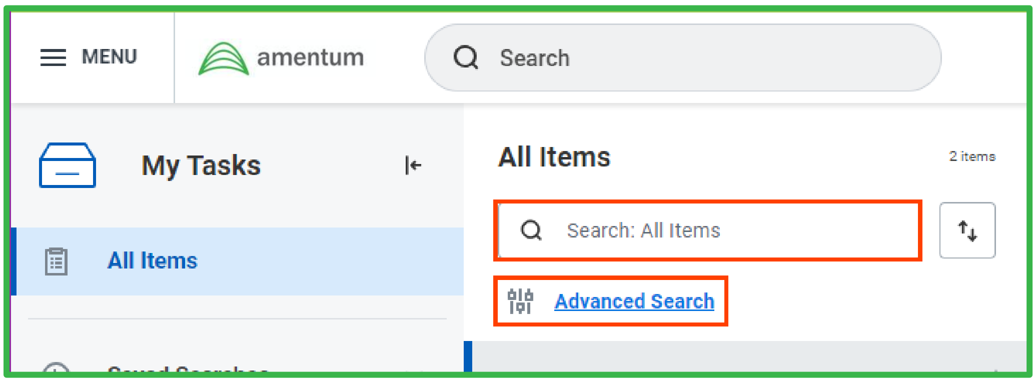
My Tasks

My Tasks Search

My Tasks utilizes a smart search. You can search using the **Search Box** for **My Tasks** by using keywords of an employee name, delegate, or business process. Workday displays tasks that match your search criteria in the central panel so you can take action directly from the search results. **Search** works acrross **All Items**, **Filters**, and **Archive**.

When performing a search, you can use the **Advanced Search** option to narrow your search by task type, task step, and date ranges. After performing a search, you can save your search for future utilization by clicking **Save** and providing a name. The **Saved Search** will be added to your **Navigation Panel** in the **Saved Searches** section. Simply click on the **Search Name** to initiate a new search in the future.

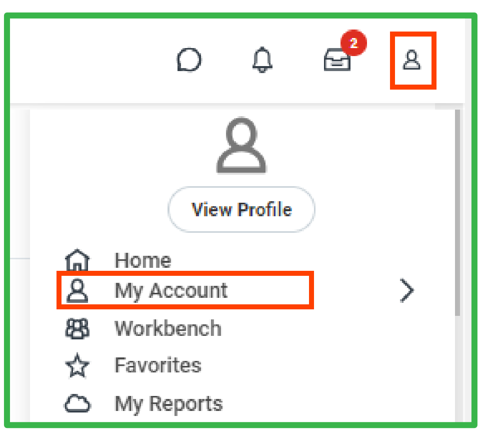
You can only save a search from the **All Items** tab in the **Navigation Panel**.



Fixing Extended Load Time for My Tasks

Some users with a high volume of tasks may experience slowness when launching My Tasks. If you encounter this issue, please complete the steps below. <u>Only users experiencing an extended load time in My Tasks should apply this setting change.</u> This setting does NOT affect the overall speed or performance of Workday.

1. Click the **Profile** icon in the top right corner of the Workday screen and select **My Account** and then select **Change Preferences**.



2. Under the **Workflow Preferences** section, activate the **Checkbox** for **Suppress Inbox Exceptions**.
3. Click **OK**.