

Overview

The former Inbox task has been renamed and changed to **My Tasks**, allowing users to easily filter, sort, and search for tasks. My Tasks allows users to quickly find and complete their tasks.

My Tasks

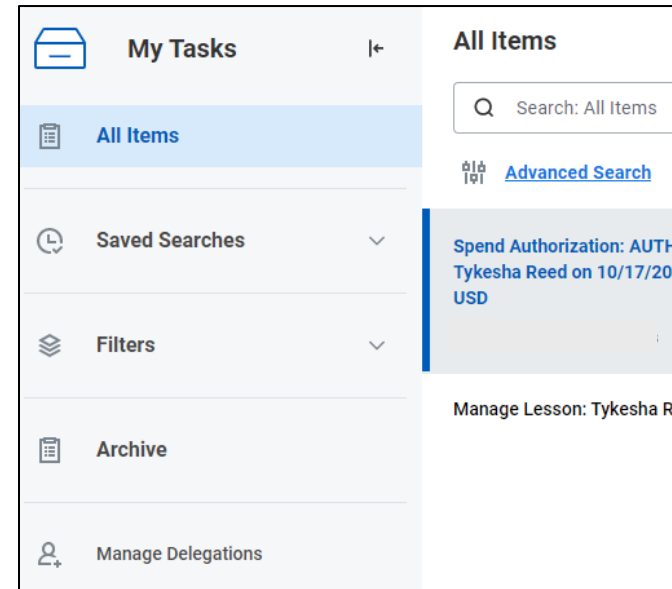
1. Log into Workday.
2. There are two ways to access **My Tasks**:
 - a. On the Home screen, under **Awaiting Your Action**, click the **Go to My Tasks** link to take action and view your tasks.

OR

 - b. Click the **My Tasks** (formerly inbox) icon in the top right corner.



3. The **My Tasks** menu appears with the default selection, **All Items** showing.

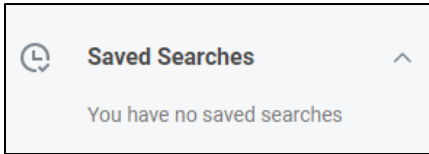


4. Under **All Items** a list of tasks appears. Click on the task and select the appropriate option, **Submit**, **Save for Later**, or **Cancel** the task.

Saved Searches

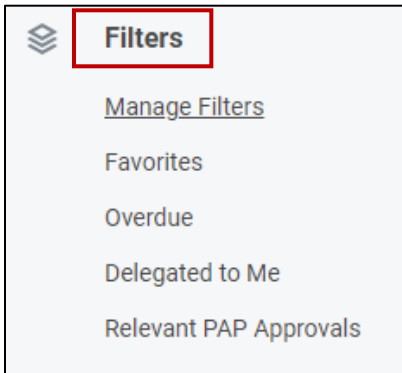
1. Under **My Tasks**, click the **Saved Searches** drop-down arrow to retrieve your saved searches for tasks. They will appear in the window.

2. If you do not have any saved searches, none will appear.

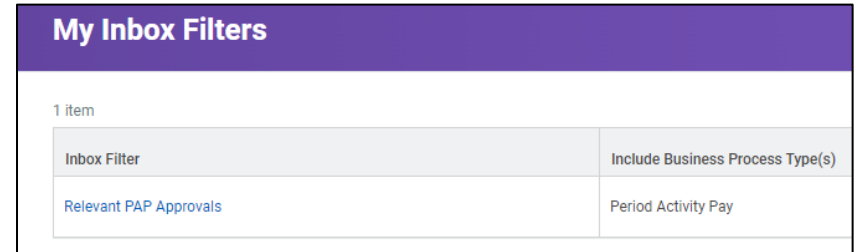



Filters

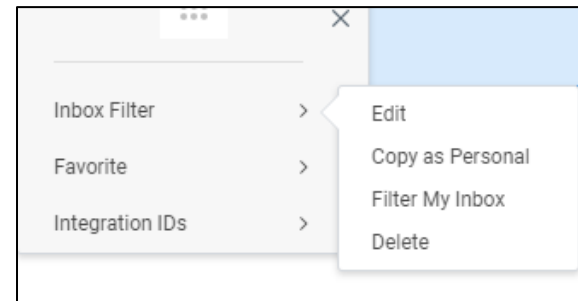
1. Under **My Tasks**, click the **Filters** drop-down arrow to select a filter option.



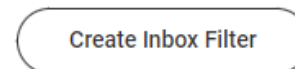
2. Click **Manage Filters** to view and create an inbox filter for business processes. Any current inbox filters will appear on the page.



3. To edit or favorite your inbox filter, put your mouse beside the inbox filter item and click the eclipse button  to open the item menu. You will see an Inbox Filter menu, a Favorite option, and an Integration IDs menu. Select the appropriate menu option and click the **X** to close the menu.



4. To create an inbox filter, click the **Create Inbox Filter button**.



My Tasks (Formerly Inbox) *Workday Job Aid for Employees*

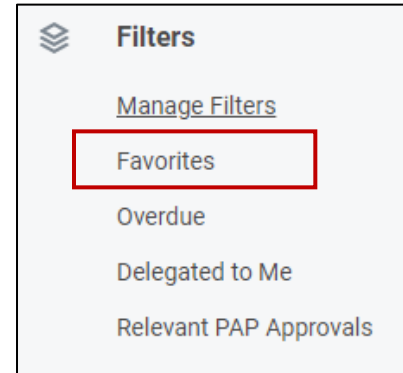
5. Type a description of the filter in the **Description** box.
6. Under the **View Definition** section, select **For all Business Processes** or click the **Business Process Type(s)** box.

You have several options for the Business Process Type.

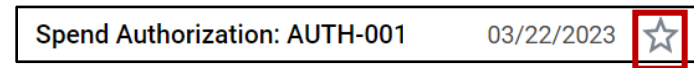
- A. You can type in the search box for a task.
 - B. You can select **Business Process Types in Inbox** and select your task.
 - C. You can select from a list of **All Business Process Types**.
7. Click the **Task(s)** box and select the Common Tasks option, By Business Process Type, the Tasks in Inbox option or type in the search box to choose a type of task.
 8. Click **OK** to create the inbox filter, then click Done.

Favorites

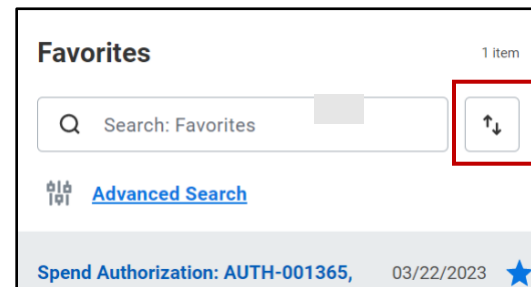
1. Under **My Tasks**, click the **Filters** drop-down arrow to select the **Favorites** filter option.



2. To create a favorite task, click the star on your task to mark it as a favorite.



3. The task will now show in the **Favorites** filter.
4. You may also use the **Favorites** search bar to locate your favorite tasks. You can sort them by using the up and down arrow button.



5. To do an advanced search, click the **Advanced Search** link under the Favorites search bar.
6. Insert the parameters and the date range and click the **Search** button.

Advanced Search

Parameters

Assignment: select one

Type: [Menu]

Step: [Menu]

Date Range

Date Type: [Menu]

Start: MM/DD/YYYY [Calendar]

End: MM/DD/YYYY [Calendar]

[Reset All](#)

Overdue Tasks

1. Under **My Tasks**, click the **Filters** drop-down arrow to select the **Overdue** filter option.

Filters

- [Manage Filters](#)
- Favorites
- Overdue**
- Delegated to Me
- Relevant PAP Approvals

2. Any overdue tasks appear in the **Overdue** filter section.
3. You can also search for overdue tasks by using the **Overdue** search bar. You can sort them by using the up and down arrow button.

Overdue 0 items

Search: Overdue [Sort]

[Advanced Search](#)

4. To do an advanced search, click the **Advanced Search** link under the Overdue search bar.
5. Insert the parameters and the date range and click the **Search** button.

Advanced Search [Close]

Parameters

Assignment: select one

Type: [Menu]

Step: [Menu]

Date Range

Date Type: [Menu]

Start: MM/DD/YYYY [Calendar]

End: MM/DD/YYYY [Calendar]

[Reset All](#)

2. Any tasks delegated to you will show in the **Delegated to Me** section.
3. You can also search for tasks delegated to you by using the **Delegated to Me** search bar. You can sort them by using the up and down arrow button.

Delegated to Me 0 items

Search: Delegated to Me [Sort]

[Advanced Search](#)

Delegated to Me

1. Under **My Tasks**, click the **Filters** drop-down arrow to select the **Delegated to Me** filter option.

Filters

- [Manage Filters](#)
- Favorites
- Overdue
- Delegated to Me**
- Relevant PAP Approvals

4. To do an advanced search, click the **Advanced Search** link under the Delegated to Me search bar.
5. Insert the parameters and the date range and click the **Search** button.

Advanced Search

Parameters

Assignment: select one

Type: [dropdown]

Step: [dropdown]

Date Range

Date Type: [dropdown]

Start: MM/DD/YYYY

End: MM/DD/YYYY

[Reset All](#)

Relevant PAP Approvals

1. Under **My Tasks**, click the **Filters** drop-down arrow to select the **Relevant PAP Approvals** filter option.

Filters

- Manage Filters
- Favorites
- Overdue
- Delegated to Me
- Relevant PAP Approvals**

2. Any Relevant PAP Approvals will show in the **Relevant PAP Approvals** section.
3. You can also search for Relevant PAP Approvals by using the **Relevant PAP Approvals** search bar. You can sort them by using the up and down arrow button.

Relevant PAP Approvals 0 items

Search: Relevant PAP Approvals

[Advanced Search](#)

4. To do an advanced search, click the **Advanced Search** link under the Relevant PAP Approvals search bar.
5. Insert the parameters and the date range and click the **Search** button.

Archive

1. All tasks from the last 90 days appear in the archive list. To view your archived tasks, click the **Archive** menu item.
2. Tasks beyond 90 days can be accessed by typing **View More Processes** in Workday's global search.

3. You can also search for Archive tasks by using the Archive search bar. You can sort them by using the up and down arrow button.

4. To do an advanced search, click the **Advanced Search** link under the Archive search bar.
5. Insert the parameters and the date range and click the **Search** button.

Manage Delegations

1. Click the **Manage Delegations** menu item to view current delegations.
2. On the Current Delegations tab, click **Manage Delegations** to edit or create a new delegation.
3. Complete the **Begin** and **End Dates**.
4. Type a delegate's name on the search bar or select a delegate by categories of Peers, Superiors, or Subordinates by Supervisory Organization. Select the check box with the delegate's name. The default is to use

the Alternate Delegate. Leave the check box selected if you want to use the Alternate Delegate listed.

5. Type the business process that the delegate may start on your behalf or select a business process by a specific business process type or select by All business processes.
6. For Doing Inbox Tasks on My Behalf, select an option of For All Business Processes, you can search For Business Processes or you can select None of the above.
7. Click the check box to Retain Access to Delegated Tasks within My Tasks.
8. If you selected a business process to Do Inbox Tasks on your Behalf, you can type a delegation rule.
9. If you have attachments, click **Select files** to upload the documents.
10. Click **Submit**, **Save for Later**, or **Cancel**.

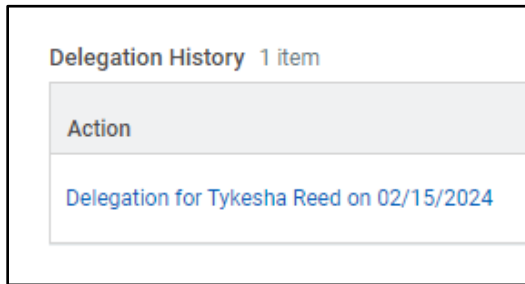
Current Task Delegations

1. Any tasks that are currently delegated, will show in the **Current Task Delegations** tab.
2. Review the information for accuracy and make changes as appropriate.

3. Click the back button to return to the previous screen.

Delegation History

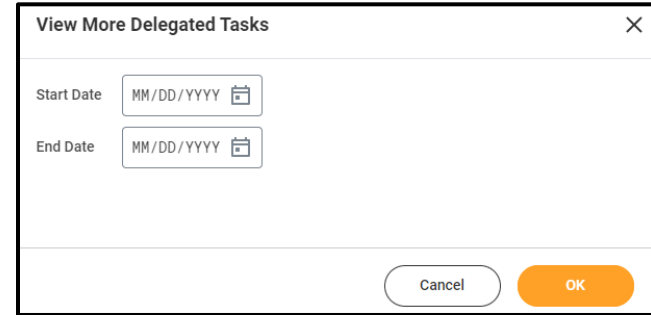
1. The Delegation History tab shows your history of delegations.



2. Click on the Delegation Action link to view the business processes allowed for delegation.
3. Click the back button to return to the previous screen.

Delegated Tasks

1. The Delegated Tasks shows all tasks that have been delegated.
2. Click the **View More Delegated Tasks** to see additional delegated tasks.
3. Enter the **Start** and **End Dates** to view more delegated tasks and click OK.



Business Processes allowed for Delegation

1. Click the **Business Processes allowed for Delegation** tab to see a list of all business processes for delegation.

Note: there are several pages of allowed business process types. Be sure to access all of the pages.

2. In the top right corner, there are options to export to excel, filter grid data, edit the grid preferences, and view in full screen.



3. Click the back button to return to the previous screen.