An Introduction to Features and Functionality that Replace Inbox

Yale Learn and Grow
• Inbox is now referred to as My Tasks.

• What was referred to as “All” within Inbox, is now called “All Items”.

• My Tasks has an automated refresh feature that removes completed tasks from view and adds any new tasks found at the time of refresh.

**Accessing My Tasks**

• My Tasks can be accessed via the icon in the top right corner of the screen.
• Like accessing Inbox on the homepage, you can click on “Go to My Tasks”.

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**Before**

![Before Image]

**After**

![After Image]
**Navigation Panel**

The My Tasks navigation panel can be collapsed for maximum screen space.

**Title Search**

- Items within My Tasks can be searched via Title Search.
- If filters are in use, Title Search will return results within filtered items only.
Creating Saved Searches

• Frequently used search terms can be saved and accessed.

• Saved searches can be edited and/or deleted.

Advanced Search

• Used to further refine searches for:
  • Assignment (Assigned Only to Me, Assigned to Multiple People, or Delegated to Me)
  • Task Type (e.g., Assign Roles, Requisition Event, etc.)
  • Task Steps (Action, Approval, Initiation, etc.)
  • Date Ranges based on Created Date, Due Date, and Effective Date
**Sorting Tasks**

The sorting within My Tasks allows users to view tasks by Newest, Oldest, and Due Soonest.

Display Density can be managed. Options:
- **Simple** – View tasks by task title.
- **Detailed** – Additional information such as Due Date, Effective Date, etc. are visible.

Date View allows users to toggle between:
- **Absolute** – Displays the date something came in.
- **Relative** – Displays how long ago it came in.
Filters, Archive, and Delegations

There is no change to the Filters function.

Archive now shows items worked on in the past 90 days instead of 30 days. To view older items, access “View More Processes” in Workday’s global search.

Manage Delegations directs to the My Delegations page.
Questions about this course? Contact:
Employee Service Center
employee.services@yale.edu
203-432-5552
Finance Support Center
askfinance@yale.edu
203-432-5394