

**Human Resources**



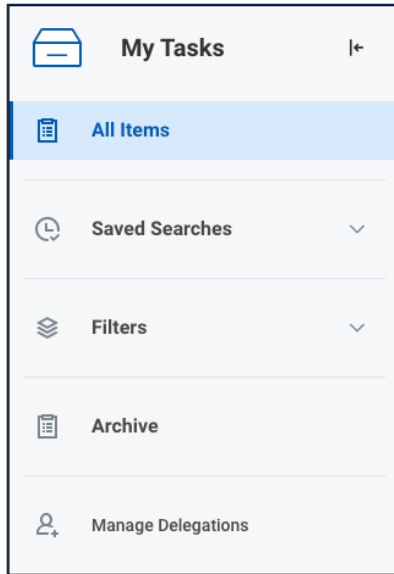
**WORKDAY**

# **My Tasks**

**An Introduction to Features and Functionality  
that Replace Inbox**

**Yale** *Learn and Grow*

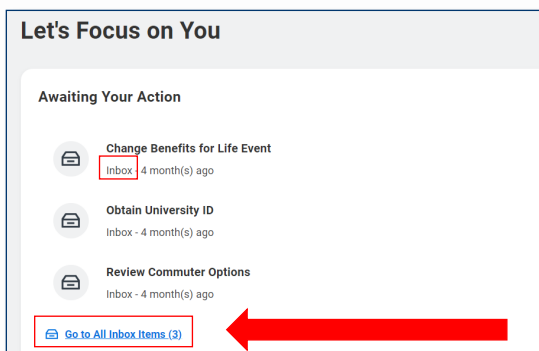
**FUNCTIONAL LEARNING**



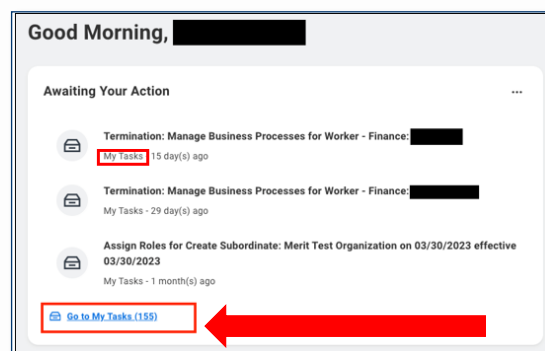
- Inbox is now referred to as My Tasks.
- What was referred to as “All” within Inbox, is now called “All Items”.
- MyTasks has an automated refresh feature that removes completed tasks from view and adds any new tasks found at the time of refresh.

## 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”.



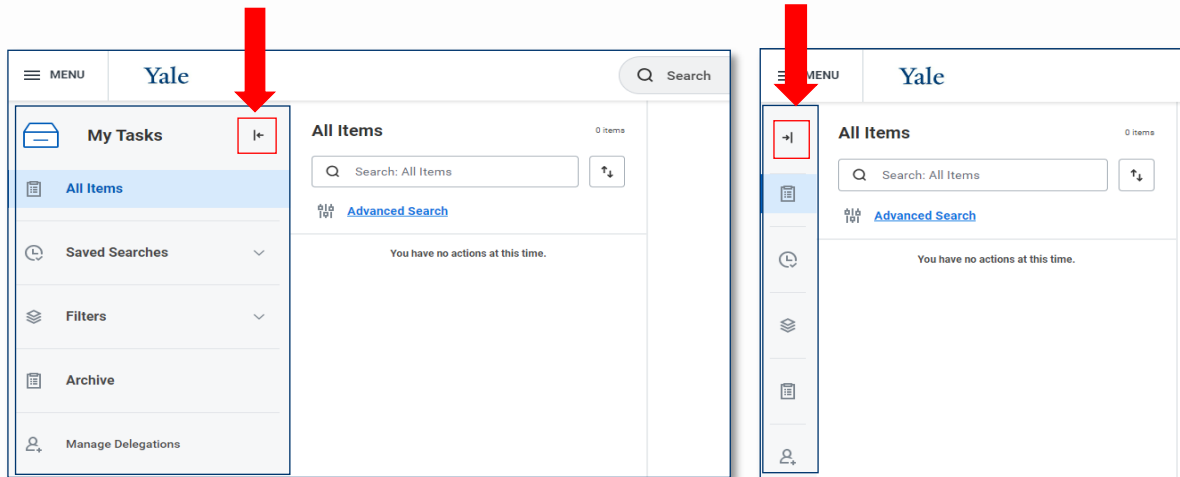
Before



After

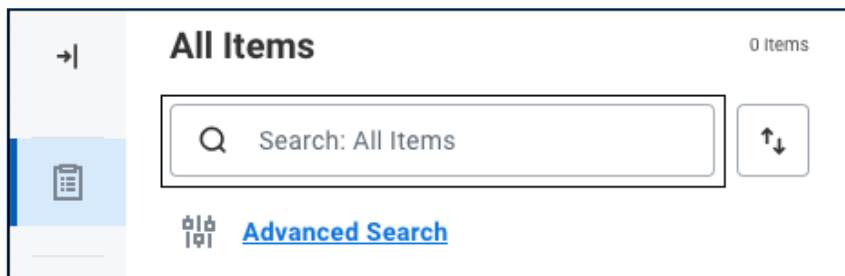
## Navigation Panel

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.

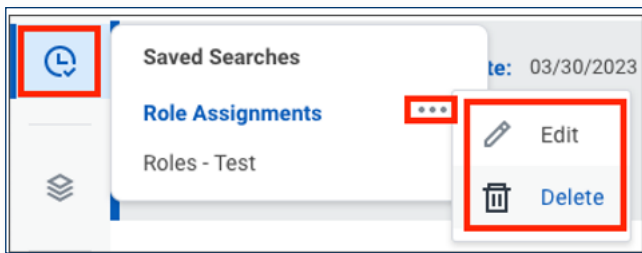


## Creating Saved Searches

- Frequently used search terms can be saved and accessed.

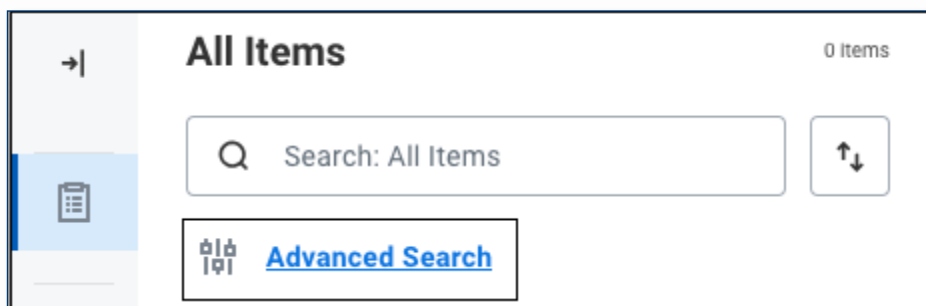


- Saved searches can be edited and/or deleted.



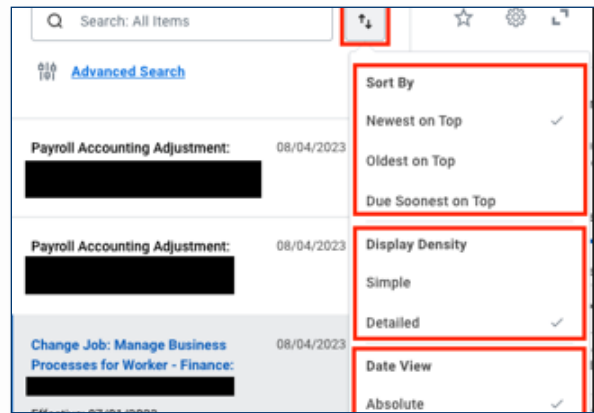
## Advanced Search

- 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



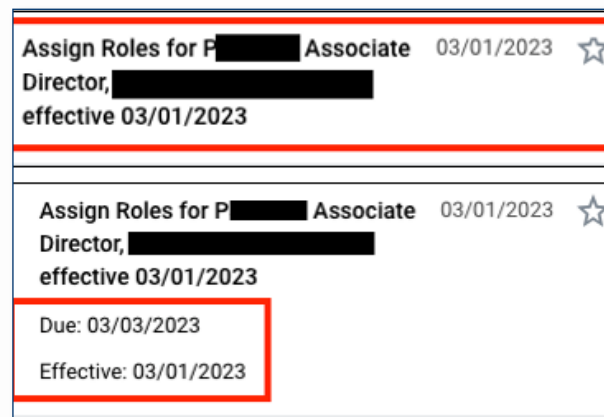
## Sorting Tasks

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



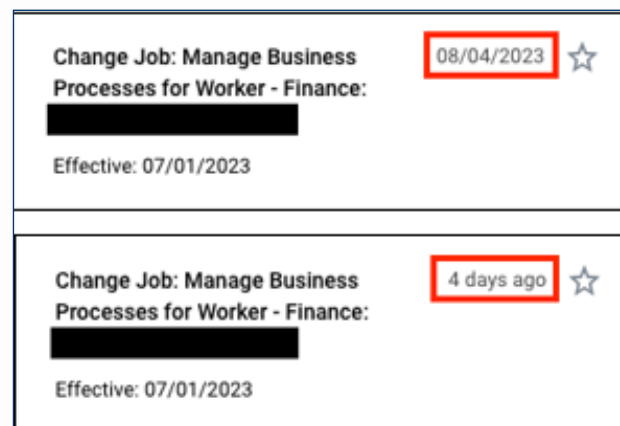
Display Density can be managed. Options:

- 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.



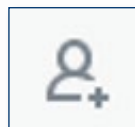
## Filters, Archive, and Delegations



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:

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