Human Resources



WORKDAY

My Tasks

An Introduction to Features and Functionality that Replace Inbox



FUNCTIONAL LEARNING



Ē	My Tasks	←
	All Items	
Ċ	Saved Searches	~
$\langle\rangle\rangle$	Filters	~
	Archive	
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- 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".

Q Search	
Let's Focus on You	Good Morning,
Awaiting Your Action Change Benefits for Life Event Inbox 4 month(s) ago Obtain University ID Inbox - 4 month(s) ago Review Commuter Options Inbox - 4 month(s) ago From Go to All Inbox Items (3)	Awaiting Your Action Image: Second Se
Before	After

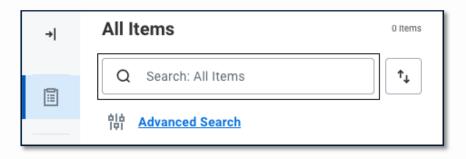
Navigation Panel

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

≡ menu Yale	C	Q Search E MENU Yale
My Tasks	All Items	All Items 0 Items
🗐 All Items	Q Search: All Items	Q Search: All Items
	dia Advanced Search	tel dia Advanced Search
🕒 Saved Searches	You have no actions at this time.	C You have no actions at this time.
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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.

Ċ,	Saved Searches	b	e:	03/30/202	23
	Role Assignments	•••	P	Edit	
♦	Noies Test	ť	Ĵ	Delete	

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

→	All Items	0 items
	Q Search: All Items	Î.
	입다 <u>Advanced Search</u>	

Sorting Tasks

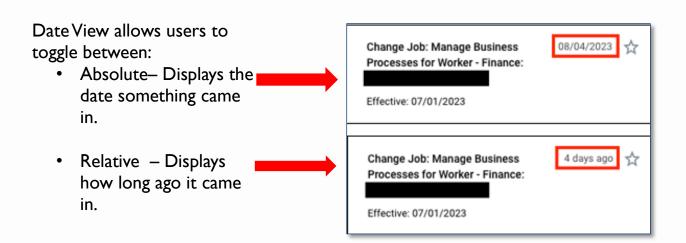
The sorting within My Tasks allows users to view tasks by Newest, Oldest, and Due Soonest.

Q Search: All Items		• ↓ ☆ [@]	} ∟ "
616 Advanced Search		Sort By	
		Newest on Top	~
Payroll Accounting Adjustment:	08/04/2023	Oldest on Top	
		Due Soonest on Top	
Payroll Accounting Adjustment:	08/04/2023	Display Density	
		Simple	
		Detailed	~
Change Job: Manage Business Processes for Worker - Finance:	08/04/2023	Date View	
		Absolute	~

Display Density can be managed. Options:

- Simple View tasks by task title.
- Detailed Additional information such as Due Date, Effective Date, etc. are visible.

effective 03/01/2023 Assign Roles for Parama Associate 03/01/2023 Director, effective 03/01/2023	Assign Roles for Planning Associate 03/01/2023 Director,
	Director, effective 03/01/2023
effective 03/01/2023	
	Due: 03/03/2023



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 <u>employee.services@yale.edu</u> 203-432-5552 Finance Support Center <u>askfinance@yale.edu</u> 203-432-5394

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