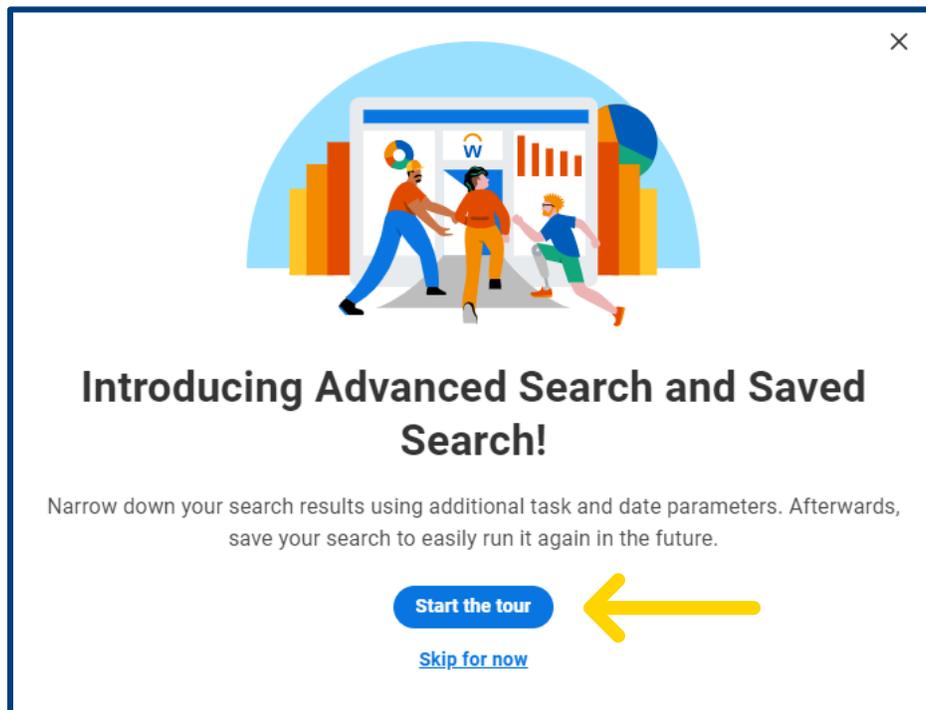


STAFF/FACULTY

Transitioning to My Tasks: The Inbox Reimagined

On April 24, 2023, the Workday Inbox was updated with a new name, look, and enhanced features. Students will still see the original Inbox, with the expected change in 2024, or if we send out sooner communication.

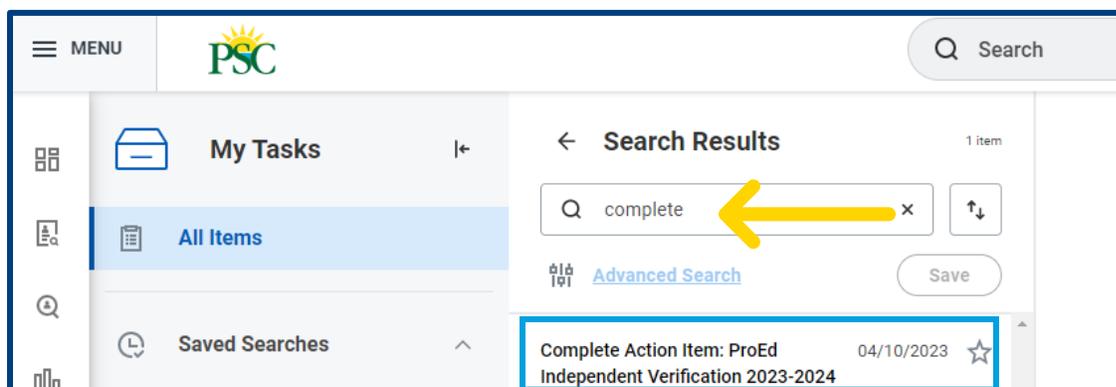
When you first access your Inbox, now called My Tasks, an instructional tour pops up. We recommend clicking Start the Tour to explore the features.



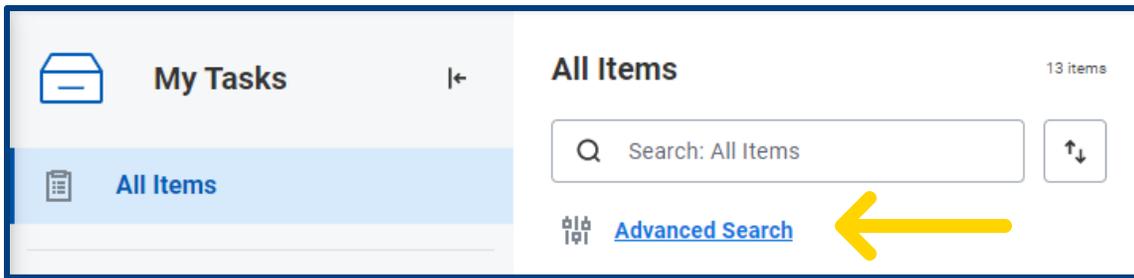
Search & Advanced Search

With the search bar under My Tasks (formerly your Workday Inbox), you can search for specific items, or with the advanced search option, further refine your searches by using task and date range parameters to locate specific tasks. This is especially helpful for those with busy inbox action items.

1. Click My Tasks.
2. Type an item in the search bar to locate results.



3. For more defined results, click Advanced Search.



4. Select a Task Type and/or Task Step. (Ex. Complete Action Item Event).
5. Select a date type (created date, due date, effective date).
6. Indicate the date range.
7. Click Search.

A screenshot of an 'Advanced Search' dialog box. At the top, it says 'Advanced Search' with a 'Reset All' link. Below this, there are two sections: 'Task' and 'Date Range'. Under 'Task', there is a 'Task Type' dropdown menu with 'Complete Action Item Event' selected, and a 'Task Step' dropdown menu which is currently empty. Under 'Date Range', there is a 'Date Type' dropdown menu with 'Due Date' selected. Below that are 'Start' and 'End' date pickers. The 'Start' date is '04/21/2023' and the 'End' date is '04/24/2023'. At the bottom of the dialog, there are two buttons: 'Search' (in orange) and 'Cancel'.

8. Review search results or click Edit Advanced Search to make changes.

Saved Searches

Once you run and save a search, it's added for easy access and automatically organizes all tasks with matching search filters.

9. Click Save if you want to use these same search criteria next time. Name your Saved Search. Click Save. Workday allows a maximum of 100 saved searches.

Filters

Include Workday delivered and College defined filters such as Overdue, Delegated to Me, and Exclude Student Onboarding Items. You can create an inbox filter through Manage Filters, but we don't recommend using this option if you're unfamiliar with business processes and conditions in Workday.

Archive

Like before, your archive allows you to track and review ongoing or completed tasks. You may also search your archive, but they cannot be saved.

Bulk Approval

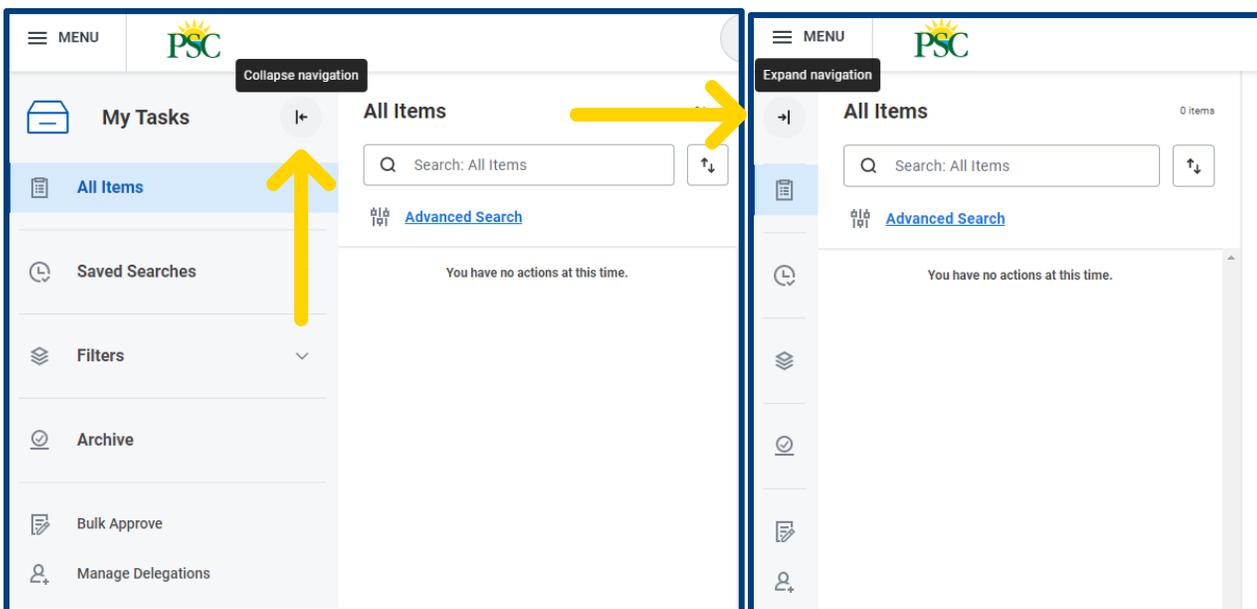
This access is currently limited to specific users like HR and is not recommended for most users since every item requires review before approval.

Manage Delegations

This was previously under the Inbox folder under My Delegations. It allows you to delegate tasks and business processes for a specified period. For example, if you're on leave and want someone to review and complete tasks on your behalf.

Collapse/Expand Navigation

The collapse/expand navigation panel allows you to collapse or expand the My Tasks toolbar.



The mobile experience will have limited search capability.