

# My Tasks (Formerly Inbox)

## USER GUIDE

### MY TASKS

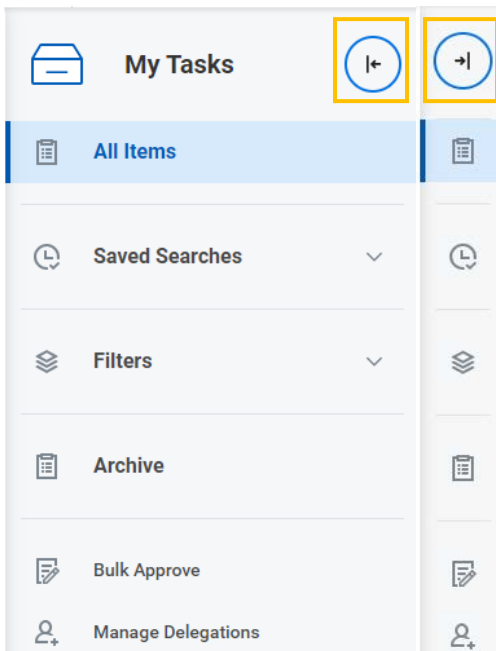
This guide walks you through the change in Workday to My Tasks, formerly Inbox. My Tasks is designed to make task management and completion more efficient with more capabilities than before.

### VIEWING MY TASKS

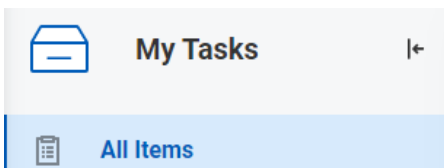
1. Click on your Profile in the upper right. Click on **the My Tasks** Icon.



2. This now opens the new My Tasks page. You can minimize or maximize by clicking on the arrow.

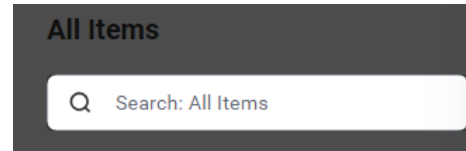


3. **All Items**- this will show all items awaiting your action.

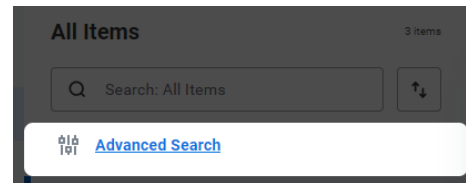


Within All Items in your Tasks, you can use Search.

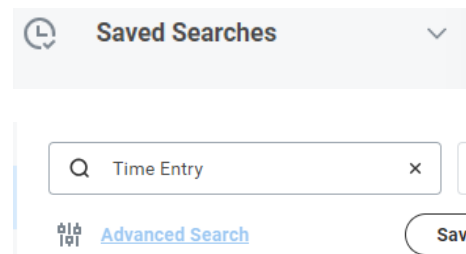
Search: All Items allow you to type in the specific Task name you are looking for and filter the rest out.



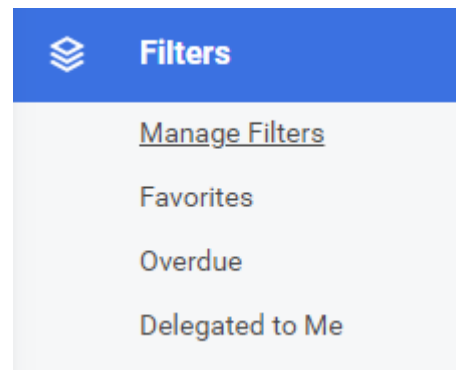
Advanced Search allows you to use additional parameters that make it easier to find specific tasks.



4. **Saved Searches**- Once you run a commonly used search in Tasks, you can save it and it will be added to your Saved Searches. Once saved, you can go to your Saved Searches and filter to that Task.




5. **Filters**- You can easily sort your Tasks by clicking on the options listed.

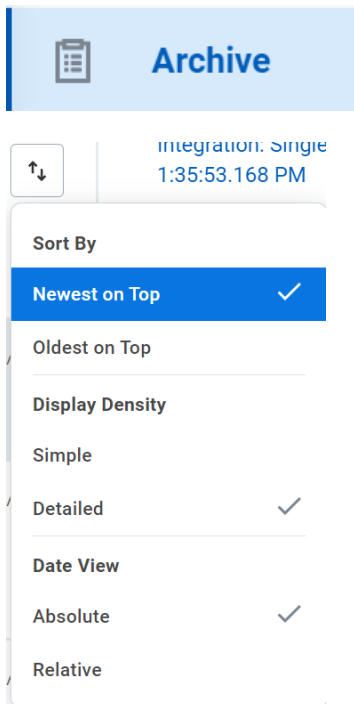


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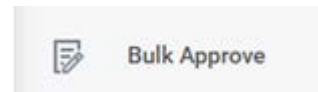
## USER GUIDE

### Filters Continued:

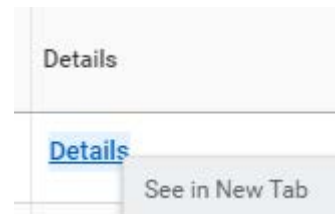
- a. **Manage Filters**- allows you to create a custom filter for your items.
  - b. **Favorites**- If you clicked on the star icon  next to a Task, it would become a Favorite. You may choose to do this on Approving Time, etc.
  - c. **Overdue**- this will filter to any Overdue Tasks that require immediate action.
  - d. **Delegated to Me**- if you have Tasks that have been delegated by another employee to you, you can filter to see just those items here.
6. **Archive**- This is where all Tasks that you have acted on will show. There are more filters than before to easily find the Task you completed. In Archive you also have Advanced Search.



7. **Bulk Approve**- This allows you to bulk approve tasks that need approval, such as timecards or invoices. **You should always review before approving.** This will not include “to-do” tasks that require action such as the costing allocation tasks.



When you click into Bulk Approve, you will be given a list of the items that require approval. We recommend that when you hover over “Details” you right click and select **See in New Tab**. This will keep your Bulk Approve tab open.



**\*If there are no Details next to the Bulk Approve task you are looking at, do not approve here. Go back to My Tasks and review it.**

8. **Manage Delegations**- This shows here as another place to Delegate your tasks if you will be gone for a period.



If selecting this, please refer to the “Delegate Your Inbox” aid found under the Workday Resources page.