



Introducing: My Tasks

My Tasks is a redesigned version of Inbox with enhanced search capabilities. Workday enables workers to find, organize, and complete tasks quickly by using My Tasks. You can use My Tasks to:

- View **All Items** to see all pending tasks assigned to you.
- View **Archive** to see all tasks that you resolved in the last 90 days.
- Filter tasks using specific criteria.
- Access the **My Delegations** report to view and manage task delegations.
- Approve items in bulk (if applicable). To determine if a business process supports bulk approval, use the **Business Process Configuration Options** report.



Search for Tasks

You can search task titles across all items, in the archive, or within filters, making it easier to find and complete important tasks. You can also search as a delegate on business processes.

In your searches, you don't need to use:

- Case-sensitive terms
- Exact word order

Workday displays the tasks that match your search criteria in the central panel of My Tasks. You can select a task in the list to take the necessary actions.

Create Filters

Workday enables you to create filters in My Tasks based on:

- Business process type
- Custom conditions
- Maximum row count

Example: As the manager of a team, you can create a condition where you filter out expense item approvals greater than 50 USD from your My Tasks view.

The kinds of filters use can create include:

Task	Description
Create Inbox Filter	Personal My Tasks filters apply to 1 or more business processes or tasks. You can't share these filters.
Create System Inbox Filter	System My Tasks filters enable you to include or exclude 1 or more business processes from My Tasks. Only administrators can create and share these filters with others through security groups.

Creating Filters: Personal Inbox Filter

Prerequisites

Security: *Self Service: Inbox Filter* domain in the System functional area. You must have both View and Modify permissions to this domain.

Steps

1. Click **My Inbox** in the upper right-hand corner of the Workday Home Screen.
2. Click **Filters** beneath **My Tasks** and then click **Manage Filters**
3. Access the **Create Inbox Filter** task.
4. Enter these values (see next page):



Field	Enter
Description	Expense Filter – 30 and Under
Maximum Row Limit	20

- From the **All Business Process Type(s)** prompt, select *Expense Report Event*.
- Select these values in the **Conditions** grid:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Expense Report Total Amount in USD	Less than	Value specified in this filer	30

Creating Filters: Inbox Filter to Share with Others

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Steps

- Access the **Create System Inbox Filter** task.
- Enter these values:

Field	Enter
Description	Time Off Requests > Than 8 Hours
Maximum Row Limit	50

- From the **Include Business Process Type(s)** prompt, select *Request Time Off*.
- Select these values in the **Conditions** grid:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Time Off Total Units - Hours	Greater than or equal to	Value specified in this filer	8

- From the **Usage Restrictions** prompt, select:
 - Manager*
 - Manager's Manager*

View the Archive (shows all tasks resolved in last 90 days)

- Click **My Tasks** in the upper right-hand corner of the Workday Home Screen.
- Click **Archive** beneath **My Tasks**.

Access My Delegations from My Tasks

- Click **My Tasks** in the upper right-hand corner of the Workday Home Screen.
- Click **Manage Delegations** beneath **My Tasks** and then click **Manage Delegations** once you arrive at the My Delegations screen.
- See our previous Help Guide regarding Managing Delegation for more info on the Delegation feature itself.

Approve Items in Bulk from My Tasks

- Click **My Tasks** in the upper right-hand corner of the Workday Home Screen.
- Click **Bulk Approve** beneath **My Tasks**.