View Your Tasks and Notifications

Tasks Overview and Taking Action

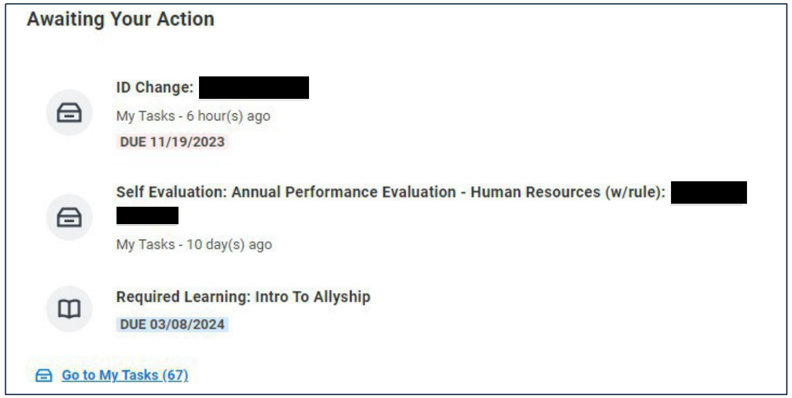
This quick reference guide will cover how to view your 'My Tasks' section of Workday.

My Tasks is where you will find business process steps assigned to you for review and approval. For this reason, it is a good idea to check your tasks frequently to ensure that business processes are moving forward. You will also receive an email in your *sandiego.edu* account notifying you that there is an item for your approval / action in Workday.

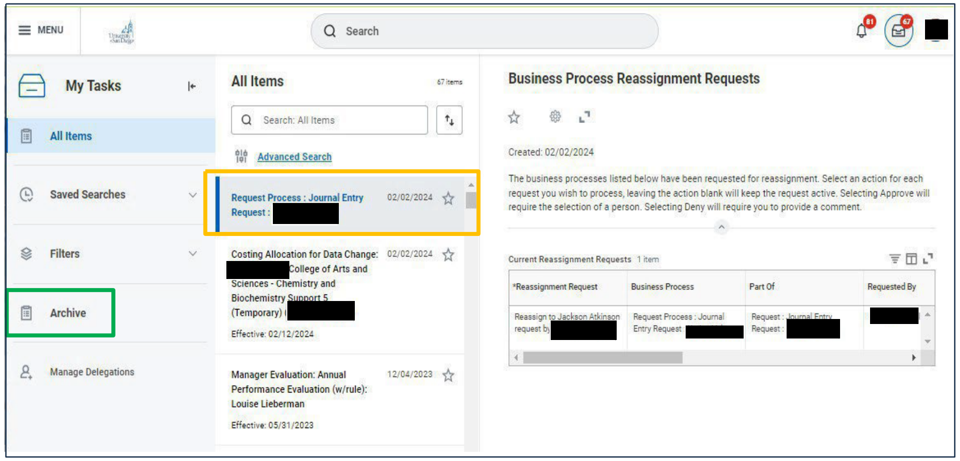
Process

1. After logging into Workday, click the **My Tasks** icon at the top right corner, as circled below. The number that appears on the icon represents the number of items currently awaiting your approval or review.

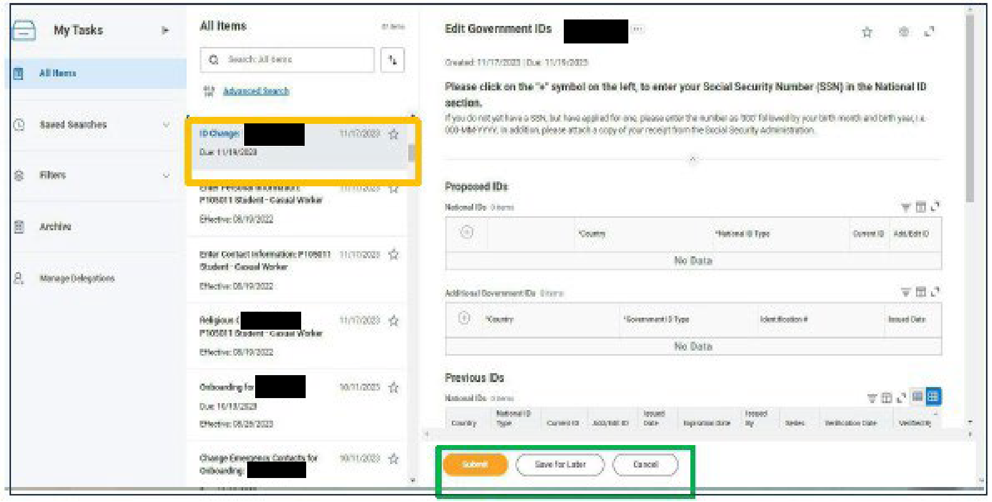
You can also access **My Tasks** by clicking on **Go to My Tasks** in the 'Awaiting your Action' section on the home page.



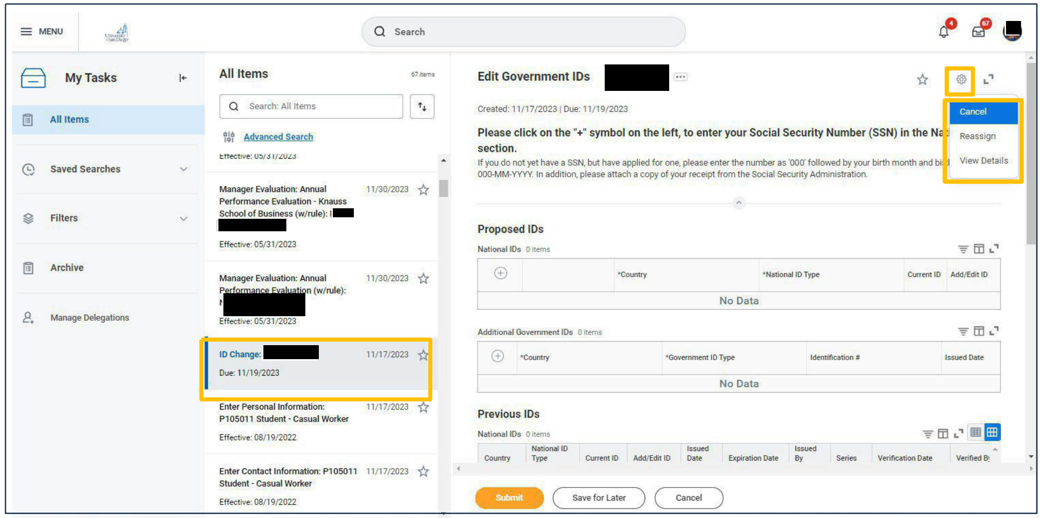
2. To review an event, click on the title in the list on the left-hand side under the All Items section (circled in yellow below). Items that appear here are those that require your attention or review and approval. Items that you have completed and submitted will appear under the Archive section (circled in green below).



3. Review the task to see if it requires you to add any information or if you need to change something. For steps that require your approval, you will see options at the bottom of the page such as **Submit, Save for Later** and **Cancel or Close**. To approve the step, click **Submit**.



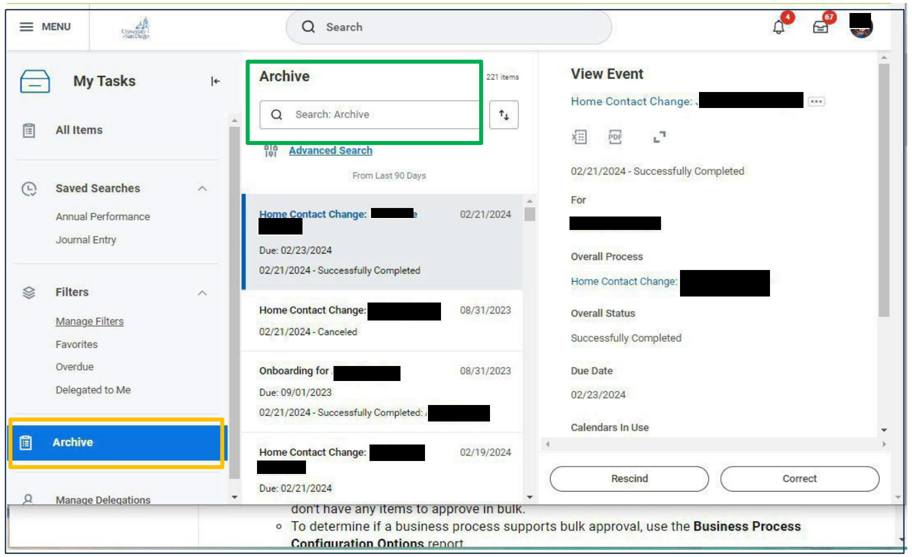
4. Click on the **Task Actions** icon found in the upper right-hand corner (looks like a gear): The options available will be relevant to the task you have highlighted when you click the **Task Actions** icon. In the example below, we see *Cancel*, *Reassign*, and *View Details*, but the actions you see may be different.



Archived Tasks

View the **Archive** to see all tasks you resolved (took action on) in the last 90 days. You can search the **Archive** utilizing the **Search Box** and **Advanced Search** features.

1. **Search Box**: To search the Archive, first click on **Archive** on the left-hand side (shown circled in yellow below), then input your criteria in the S**earch Box** (as shown circled in green):



2. **Advanced Search**: To conduct an **Advanced Search** of the **Archive**, first click on **Archive** on the left- hand side, then click on the **Advanced Search** hyperlink: The **Advanced Search** window will open.

   Please see the **Search: Advance Search** section for an explanation of the **Advanced Search** window features.

Manage Delegations

Delegations are discussed in the **Understanding Delegations** Quick Reference Guide.

Searching Tasks

Search Overview

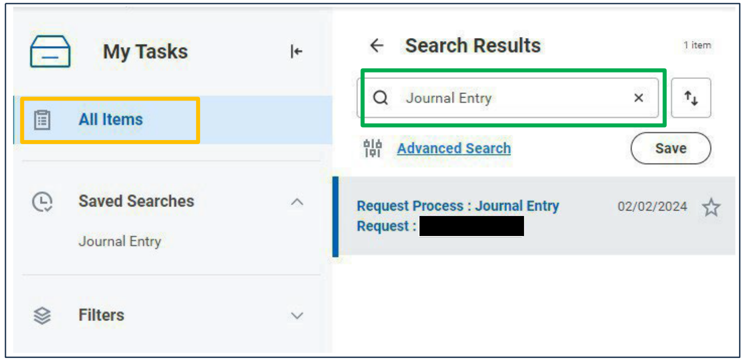
There are different ways you can search 'My Tasks' in Workday:

- **All Items:** Type keywords (person's name, task name) in the 'Search All Items' search box for a wide-open search.
- **Advanced Search**: Include additional search criteria such as Assignment (who is it assigned to), task type, and date range to further refine the search results.
- **Saved Searches:** Create and quickly access and execute searches you have saved.
- **Filters:** - Create filters to further revise search results.

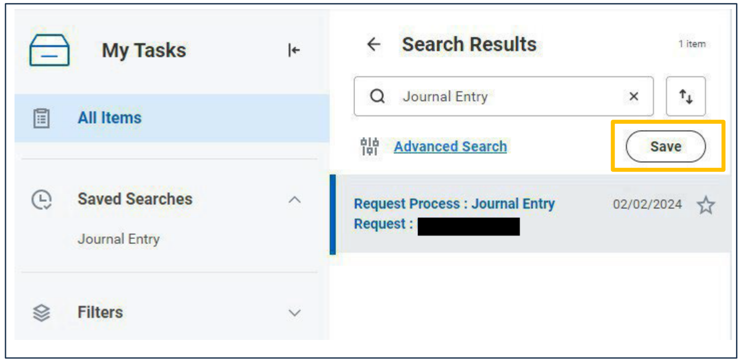
Search: All Items

To search using **All Items**:

1. After logging into Workday and clicking the **My Tasks** icon, make sure the **All Items** option is selected, as shown circled in yellow below. Then place your cursor in the **Search Box** (shown circled in green below), type in your search criteria and hit the Enter key on your keyboard. In the example below, **Journal Entry** was the search criteria; One matching task was found.

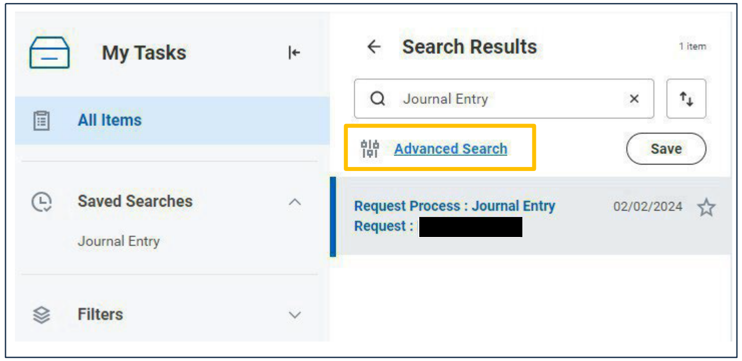


2. To save this search to be used later, click on the **Save** button. More information about **Saved Searches** can be found in the **Search: Saved Searches** section.

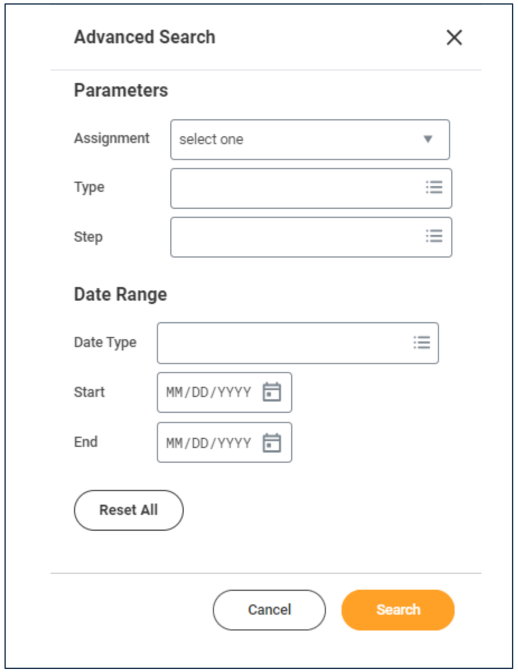


Search: Advanced Search

1. After logging into Workday and clicking the **My Tasks** icon, observe the area under the **Search Box**: There you should see the **Advanced Search** link, as shown below:



2. After clicking on the **Advanced Search** link, observe the Advanced Search window that pops up:



3. From the **Advanced Search** window, you can search various ways:

Parameters:

a. Assignment: Options available:

- ***Assigned only to Me***: The task is exclusively in your **My Tasks** inbox.
- ***Assigned to Multiple People***: The task is in your, as well as other people's **My Task** inbox.
- ***Delegated to Me***: The task is for another person/role, but the task type for a particular person/role has been delegated to you for action/review. More about delegations can be found in the **Understanding Delegations** Quick Reference Guide.

b. Type: Select a task type to search for. Examples can include ***Assign Costing Allocation***, ***Hire***, ***Onboarding*** or ***Accounting Journal Event***.

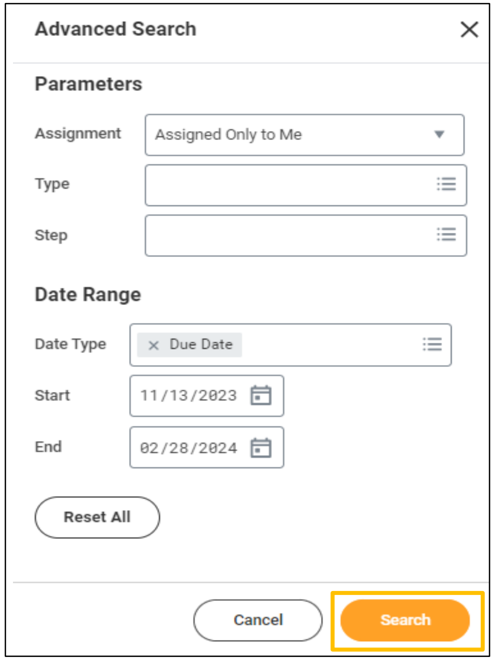
c. Step: This field works in conjunction with the **Type** value: First you must select a Type value. The **Step** values available vary based on the **Type** selected.

Date Range:

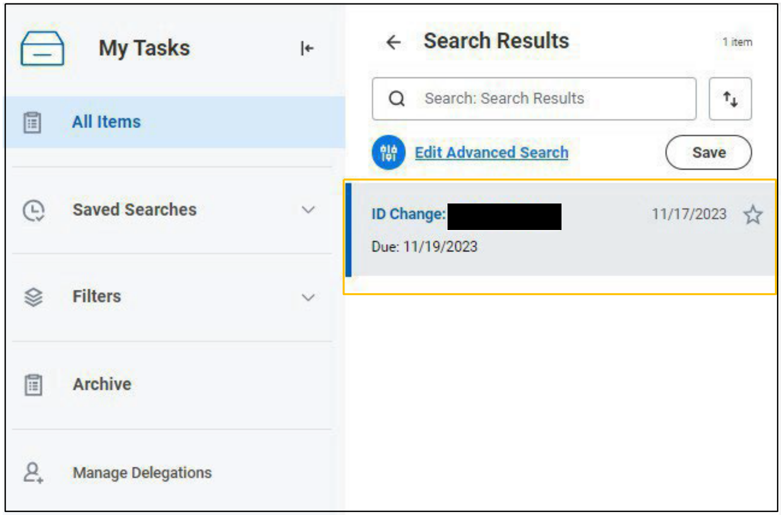
a. Date Type: Choices include ***Created Date***, ***Due Date***, and ***Effective Date***.

b. Start, End: The **Start** and **End** date fields work in conjunction with the **Date Type** field; A value for the **Date Type** field must be selected in order to enter a **Start** or **End** date value.

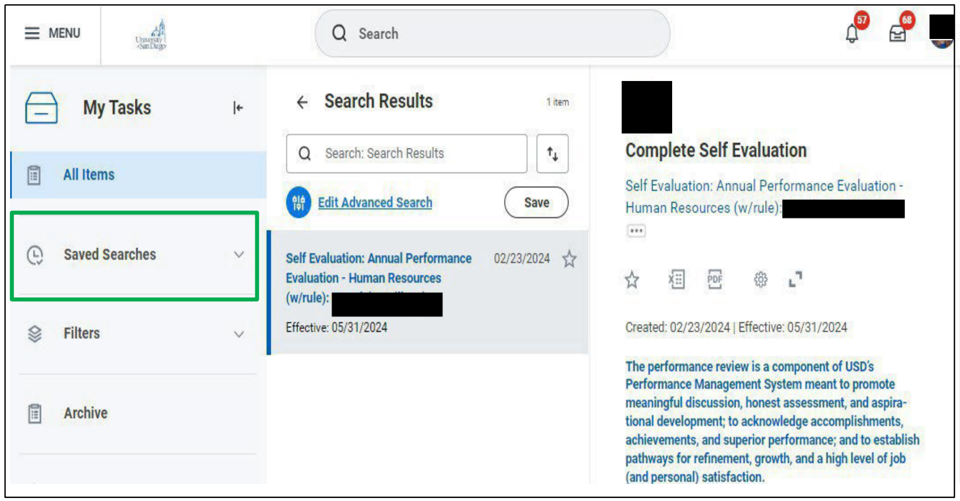
4. After you have entered your parameters and/or date range, click the **Search** button to execute the **Advanced Search**.



The results will be displayed under the Search box as shown below:

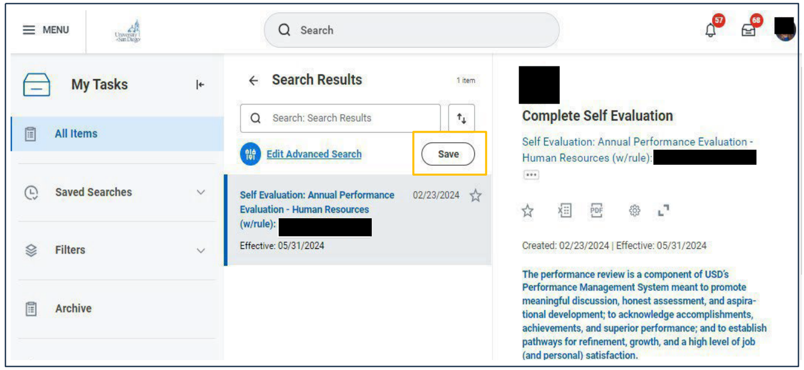


4. To save the **Advanced Search**, click the **Save** button: This search will now be displayed in the**SavedSearches** sectionasshowncircledin green below. See the **Search: Saved Searches** section for more information.

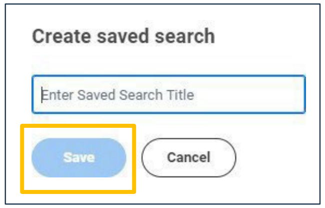


Search: Saved Searches

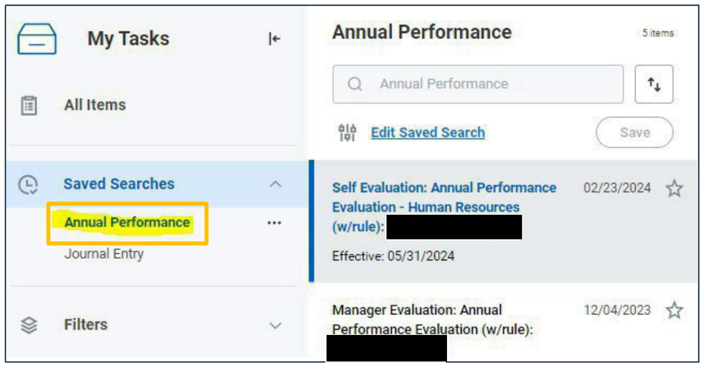
After you conduct a search, you can elect to save the search criteria for future use. To do so, after you've conducted the search, simply click the **Save** button as shown below.



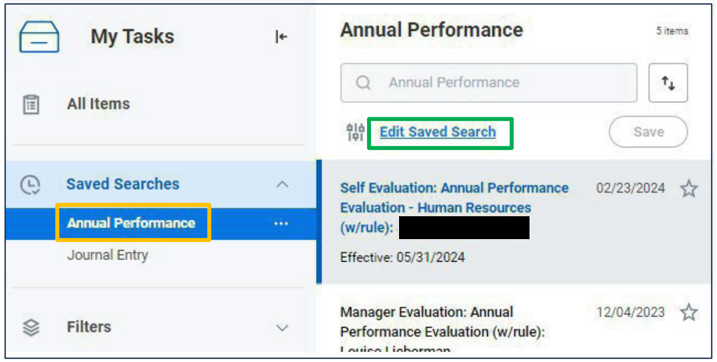
You will then be prompted to name the search: Enter a name and click the **Save** button.



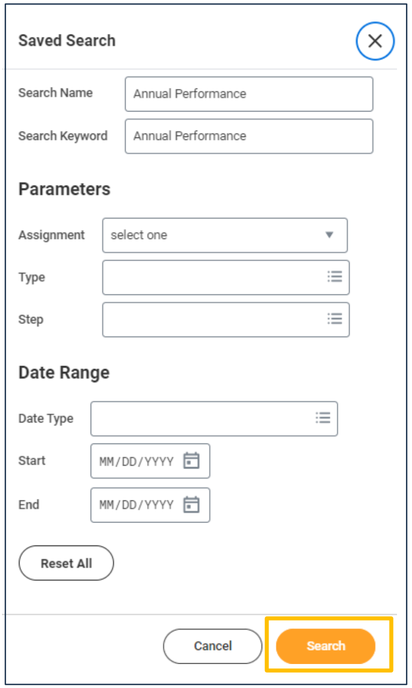
Saved searches can then be found under the **Saved Searches** section. To execute a saved search, simply click on the search name:



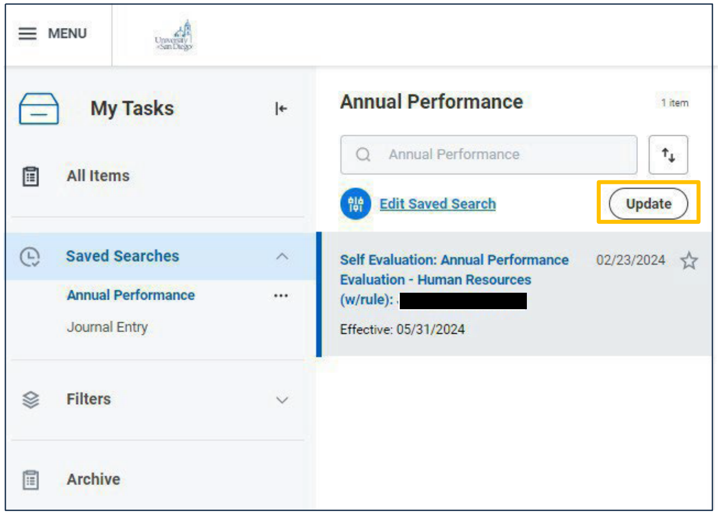
To edit a Saved Search, first make sure you have clicked on a previously saved search (shown circled in yellow below), then click on the **Edit Saved Searches** hyperlink (shown circled in green below).



In the Saved Search window, make any desired changes and click the **Search** button.

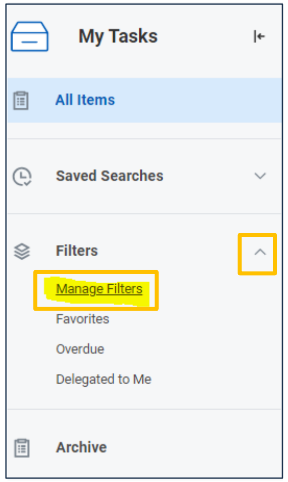


Important: In order to save the changes you made to the search, you must click the **Update** button:

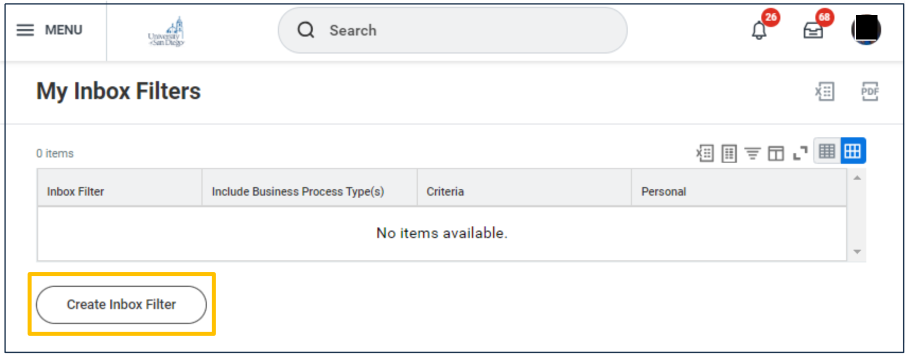


Search: Filters

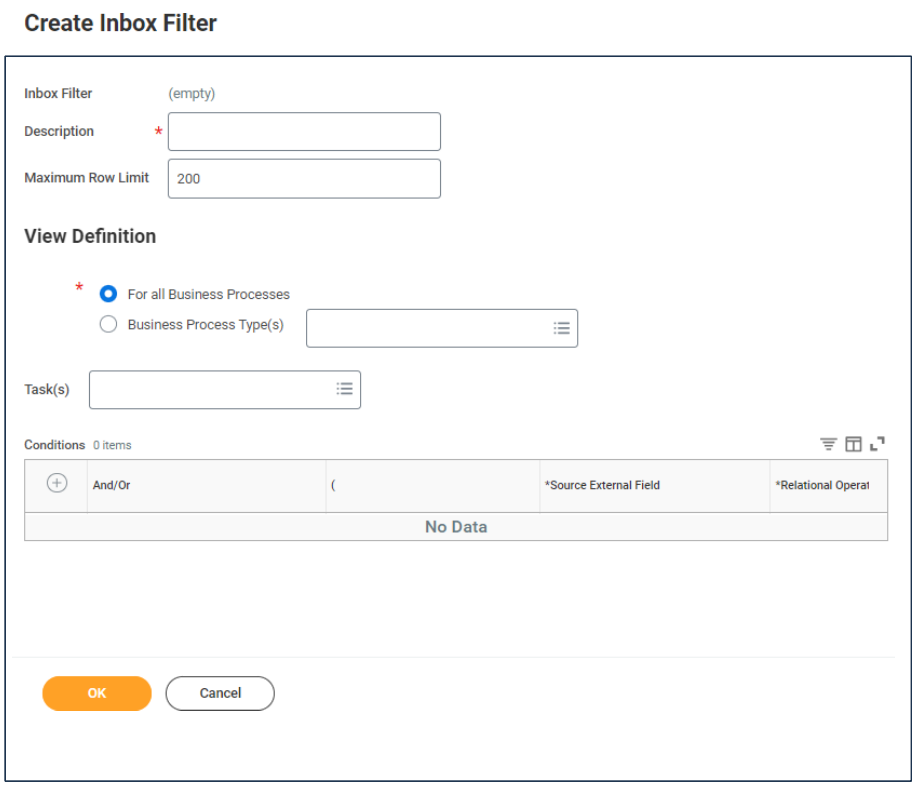
Creating filters is another way to search for tasks. To create a filter, click on the arrow next to filters, then select **Manage Filters**.



Then, click the **Create Inbox Filter** button:

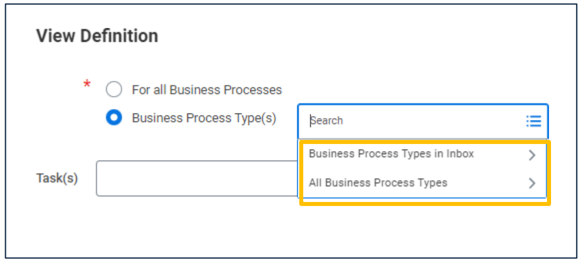


The **Create Inbox Filter** window is displayed:



Next, enter the following:

- **Description** *(required)*
- **View Definition**: *(must choose one of the following options)*:
  - **For all Business Processes** - Select this option to ***not*** limit the filter to a particular business process.
  - **Business Process Type(s)** - Select this option to limit the filter to a particular business process. If you select this option, you ***must*** select one or more business processes. Click on the three ellipses to view the options: You have the option to select from a list of business process types that are in your My Tasks list, or from a list of all business processes.



  - **Task(s)** - Select this option to limit the filter to specific task types, such as *Approvals*, *Attach Document* or *To Dos.* Click the three ellipses and select the desired Task Type(s).
  - **Conditions** - Conditions are currently out of scope.

Notifications Overview

Your Workday notifications screen is where you will find information from a business process that you should be aware of, but that does not require action (e.g. when a business process has been completed) or to notify you that you need to complete a **Required Training** .

Process

1. After logging into Workday, click the **Notifications** icon at the top right corner,

   as circled below. The number that appears on the icon represents the number of items currently awaiting your review.

2. To review a notification, click on the title in the list on the left-hand side.

Notifications that appear here are those that you should be aware of and/or notifying you to complete a required training within Workday. You can click on the **Details** or **View Course** link to view additional information.