MY TASKS AND NOTIFICATIONS

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Description: This quick guide demonstrates two important Workday features you will use every day, Notifications and My Tasks. These features help you read, find, organize, and complete tasks in a timely manner.

Applies to: All users.

NOTIFICATIONS

Notifications contain important alerts/reminders that may require action and information about the completion of business processes. You may also receive an email when an alert becomes available.

1. The number next to the bell indicates the number of the unread items in your notification list. Click the bell icon to access and read **Notifications**.

2. To clear notifications:

   a. Click the circle next to the notification, or

   b. Expand the drop down and select **Mark All as Read**.

   c. Notifications remain for 30 days. Filter by **Unread** to only see new items.

MY TASKS

My Tasks are items that require action.

1. The number next to the icon indicates the number of the items that require your action. Click the inbox icon to access **My Tasks**.

   a. Selected task will be highlighted and in blue text.

   b. Perform the action on the right side for the selected task.

   c. Click the buttons on the bottom to complete the task or route the task to another person.
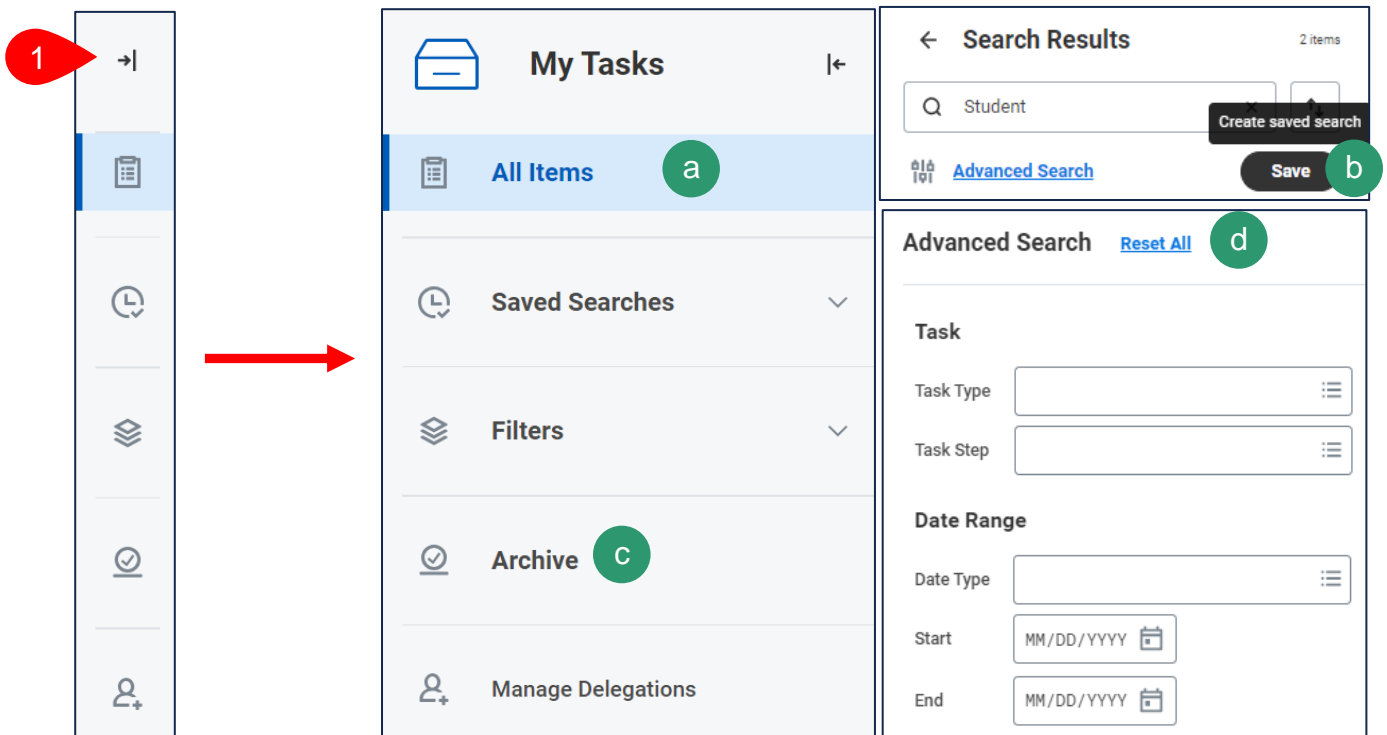
MY TASKS PANEL

The **My Tasks** panel allows multiple ways to search tasks on your list.

1. Expand the **My Tasks** panel to view all available functions.

    a. Type items to search in the **Search All Items** box.

    b. Click **Save** to save your search to use at a future date.

    c. View the **Archive** to see all tasks that you resolved in the last 90 days.

    d. **Advanced Search** enables searching for additional task and date parameters.

    e. **Task Type** in the advanced search will only show the tasks that are available in your **My Tasks** at the time of the search.
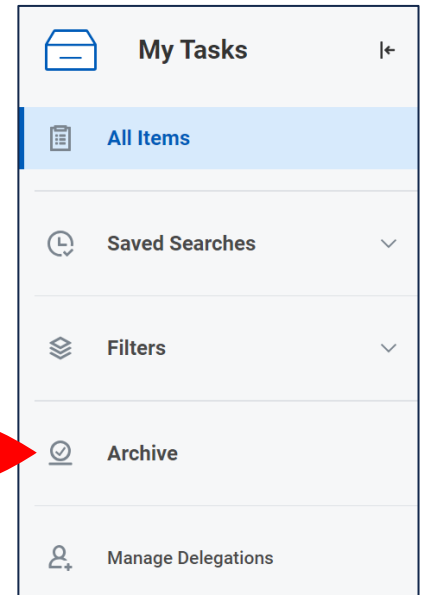

Note: You cannot use the saved search feature on archived transactions.

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USING ARCHIVE

You can find the status of a task from your **My Tasks > Archive**.

1. Select **Archive** from the My Tasks panel.

   a. Select the task on the left panel.

   b. Click the **Process** tab.

   c. The **Process History** tells you which Step is awaiting action, the Status of the Step, when the Step was completed, and who completed it.

My Tasks

- All Items
- Saved Searches
- Filters
- **1** → Archive
- Manage Delegations

Archive — 27 items

Search: Archive

Advanced Search

From Last 90 Days

Request Process : Refund Request : Sally Student — 06/27/2023

2 second(s) ago - In Progress **a**

View Event Request Process : Refund Request : Sally Student

2 second(s) ago - In Progress

For — Request : Refund Request : Sally Student

Overall Process — Request Process : Refund Request : Sally Student

Overall Status — In Progress

Details **Process** **b**

Process History 3 items **c**

Process	Step	Status	Completed On	Due Date	Person (Up to 5)
Request	Request	Step Completed	06/27/2023 03:18:37 PM		Sally Student
Request	Close Request	Sent Back	06/27/2023 03:46:35 PM		
Request	Request	Awaiting Action			Sally Student

Note: If a task is still pending, the Process History tells you what steps require action and who needs to complete them.