Workday Inbox: Advanced & Saved Searches

SEARCH WORKDAY TASK INBOX

Workday has streamlined the task inbox by adding Advanced Search and Saved Search options. Advanced Search enables additional parameters for searches to find specific items in the Task and Archived inboxes. Saved Search enables reuse of a search of the Task inbox in the future.

To access your Workday **My Task Inbox**, click the 🔁 icon in the top right of your screen.

ADVANCED SEARCH

1. Click **Advanced Search** option below the search field on the left of your inbox screen.

→	All Items	
0	Q Search: All Items	Î. Î.
	해요 [편] <u>Advanced Search</u>	

2. Enter the search parameters in the available fields.

Advanced Search Reset All		
Task		
Task Type	× Endorse Candidate	∷≡
Task Step		∷≡
Date Rang	ge	
Date Type	× Due Date	∷≡
Start	01/01/2023 🖬	
End	01/31/2023	
Search	Cancel	



<u>Note</u>: Type and Step Task search is limited to the items in your inbox at the time of your search.

- 3. Click Search.
- 4. To remove the Advanced Search filter from your view, select the All Items icon from the menu on the left of your screen.



<u>Note</u>: Archived tasks are retained for a 90-day period. Date ranges for an Advanced Searches of Archived items will return tasks actioned in the last 90 days that meet the date type and range selected.

Advanced Search archived tasks: select the **Archive** icon from the menu on the left and complete steps 1 through 3 of this section.

Geisinger

Workday Inbox: Advanced & Saved Searches

EDIT SEARCH PARAMETERS

1. Click the **Edit Advance Search** option below the search field to reopen the search window. Update search parameters.

÷	Search Results	
Q	Search: Search Results	↑ ↓
î și și	Edit Advanced Search	Save

2. Click Search.

SAVE A SEARCH

1. Click the **Save** option below the search field.

÷	Search Results	
Q	Search: Search Results	↑ ↓
<u>Şļģ</u>	Edit Advanced Search	Save

2. Enter a Search Title and click **Save**.

Create saved search		
Enter Saved Search Title		
Save Cancel		



Note: Saved Search is not currently available for the Archive task inbox.

RUN A SAVED SEARCH

1. Click the **Saved Searches** icon from the menu on the left of your screen.



2. Select the save search from the list to immediately run and view match tasks in your inbox.

Geisinger