

Tasks: Find, Understand, & Complete

This guide shows you how to **find** your **tasks in Workday**, understand what **action** is **needed**, and complete them. Whether it is an approval waiting for your decision, a to-do you need to finish, or a notification keeping you informed, this job aid takes you through it step by step.

Who is this for: All Employees

Time to complete: 5 to 10 minutes

Before You Start

- You are using a web browser (e.g., Chrome, Edge, Safari)
- Keep any supporting documents ready if you plan to make a legal name change (e.g., marriage certificate, court order)

Types of Tasks You Will See

Task Type	What It Means
Approval	You need to review and approve or deny a request (e.g., time off, job change, expense)
To-Do	An action you need to complete yourself (e.g., complete a self-review, enroll in benefits, update your information)
Notification	An informational update that does not require any action from you (e.g., a process was completed, a change was made)

Finding Your Tasks

STEP 1:

From the Workday Homepage, you can see your pending tasks in two ways:

1. **Quick view:** The "**Awaiting Your Action**" card on the **homepage** shows any tasks waiting for you. If there are none, it will say "You're all caught up on your tasks"
2. **Full view:** Click the **My Tasks icon** (tray icon) in the **top right corner** of the screen, or type "**Inbox**" in the **search bar** and select it from the results

The screenshot shows the Ambient Workday homepage for Michael Scott. The top navigation bar includes the Ambient logo, a search bar, and icons for chat, notifications (26), and tasks (13). The main content area features a 'Hello There' greeting, a search bar, and several navigation buttons: 'My Org Chart', 'Learning', 'Jobs Hub', 'Benefit Elections', and 'Manage Job Requisitions'. On the left sidebar, the 'My Tasks' icon is highlighted with a red circle and the number 1. The 'Awaiting Your Action' card is prominently displayed, listing three tasks: 'Data Change: Ross Geller' (due 08/18/2026), 'Change Contact Information: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026', and 'Benefit Change - Home Address Change : Michael Scott on 07/14/2026'. To the right, there are sections for 'Announcements' and 'Important Dates'.

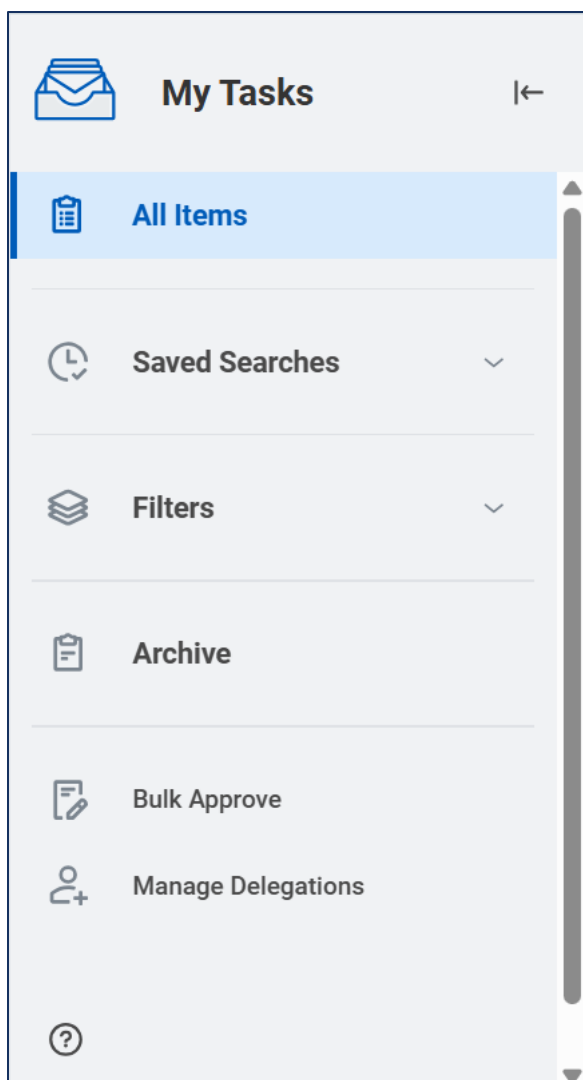
Finding Your Tasks

STEP 2:

The My Tasks page will open. On the left panel you will see:

- **All Items:** Your complete list of pending tasks
- **Saved Searches:** Any searches you have saved for quick access
- **Filters:** Narrow your tasks by type, date, or category
- **Archive:** View tasks you have already completed
- **Manage Delegations:** Set up or manage delegation rules

The main area will show your task list under All Items with a count of items at the top. If you have no pending tasks, it will say "You have no actions at this time."



Understanding & Finding Specific Tasks

STEP 3:

Click on any task in the **All Items** list to open it. Inside the task you will see:

1. **Task title** describing what the task is about
2. **Details section** with the relevant information you need to review (e.g., employee name, requested dates, amounts)
3. **Action buttons** at the bottom telling you what you can do (e.g., Approve, Deny, Send Back, Submit, Save for later, Done)

The screenshot displays the Ambient task management interface. On the left, the 'All Items' list shows three tasks. The first task, 'Data Change: Ross Geller', is highlighted with a red box and a red circle with the number 1. The task details show a due date of 08/18/2026 and an effective date of 08/23/2026. The second task, 'Benefit Change - Home Address Change : Michael Scott on 07/14/2026', has a due date of 07/29/2026 and an effective date of 07/14/2026. The third task, 'Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026', has a due date of 07/29/2026 and an effective date of 06/30/2026. On the right, the detailed view of the 'Revise Job Change' task is shown. The task title is 'Revise Job Change' with a subtitle 'Data Change: Ross Geller'. The 'Start' section shows the 'Start Details' and a question 'When do you want this change to take effect?' with a red asterisk, followed by the date '08/23/2026'. Below this is another question 'Why are you making this change?' with a red asterisk, followed by the text 'Change Job Details'. At the bottom, there is a question 'Who will be the manager after this change?'. The bottom of the task view features three buttons: a red circle with a white ellipsis, a 'Save for Later' button, and a blue 'Submit' button. A red box and a red circle with the number 3 highlight these buttons. A red box and a red circle with the number 2 highlight the task title and subtitle area. A red box and a red circle with the number 1 highlight the task title and subtitle area.

All Items 13 items

Search: All Items

Advanced Search

Data Change: Ross Geller 08/11/2026 ☆

Due: 08/18/2026

Effective: 08/23/2026

Benefit Change - Home Address Change : Michael Scott on 07/14/2026 07/29/2026 ☆

Effective: 07/14/2026

Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026 07/29/2026 ☆

Effective: 06/30/2026

Created: 08/11/2026 | Due: 08/18/2026 | Effective: 08/23/2026

Revise Job Change Data Change: Ross Geller

PDF

Start

Start Details

When do you want this change to take effect? *

08/23/2026

Why are you making this change? *

Change Job Details

Who will be the manager after this change?

Save for Later Submit

Understanding & Finding Specific Tasks

STEP 4:

To find a specific task or narrow your list:

1. Use the **Search bar** ("Search: All Items") at the top of the task list to search by name or keyword
2. Click the **sort icon** next to the search bar to arrange tasks by date or priority
3. Click **Filters** in the left panel to narrow tasks by type or category
4. Click **Advanced Search** below the search bar for more detailed filtering options

The screenshot shows the 'My Tasks' interface. On the left is a sidebar with 'My Tasks' and a list of options: 'All Items' (selected), 'Saved Searches', 'Filters', 'Archive', 'Bulk Approve', and 'Manage Delegations'. The main area is titled 'All Items' and shows a list of tasks. At the top of this list is a search bar labeled 'Search: All Items' and a sort icon (two arrows pointing up and down). Below the search bar is a link for 'Advanced Search'. The task list includes items like 'Data Change: Ross Geller' and 'Benefit Change - Home Address Change: Michael Scott on 07/14/2026'. On the right, a task detail panel is visible for 'Revise Job Change'.

The 'Filters' panel is shown, containing the following options: 'Manage Filters', 'Favorites', 'Overdue', and 'Delegated to Me'.

The 'Advanced Search' dialog box is shown with the following sections:

- Parameters:** Assignment (dropdown: select one), Type (text input), Step (text input).
- Date Range:** Date Type (text input), Start (calendar icon), End (calendar icon).
- Buttons: 'Reset All', 'Cancel', and 'Search'.

The 'Sort By' dropdown menu is shown with the following options: 'Newest on Top' (selected), 'Oldest on Top', 'Due Soonest on Top', 'Display Density', 'Simple', 'Detailed', 'Date View', 'Absolute', and 'Relative'.

Completing Your Tasks & Checking Notifications

Completing Your Tasks

STEP 5:

To complete a task:

1. Open the task by clicking on it from the **All Items** list
2. Review the details carefully to understand what is being requested
3. Click the appropriate **Action Button** at the bottom (e.g., **Submit**, **Save for Later**, **Close**, **Approve**, **Deny**, **Send Back**, **Submit**, or **Done**)

Add a comment if needed, then confirm your action

The screenshot displays the Ambient task management interface. On the left, a sidebar contains navigation options: 'My Tasks' (with a folder icon), 'All Items' (highlighted with a red box and a red circle '1'), 'Saved Searches', 'Filters' (with a dropdown arrow), 'Archive', and 'Bulk Approve'. The main area is divided into two panels. The left panel, titled 'All Items' (with a '13 Items' count), shows a list of tasks. The first task, 'Data Change: Ross Geller', is highlighted in yellow and has a red circle '2' next to it. It includes a search bar, an 'Advanced Search' button, and a star icon. The task details show a due date of 08/18/2026 and an effective date of 08/23/2026. Below it are two other tasks: 'Benefit Change - Home Address Change : Michael Scott on 07/14/2026' and 'Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026'. The right panel shows the details of the selected task, 'Revise Job Change', with a red box and a red circle '2' around the top section. It includes a 'Data Change: Ross Geller' link, a PDF icon, and a 'Start' section. The 'Start Details' section contains three questions: 'When do you want this change to take effect? *' (with a date of 08/23/2026), 'Why are you making this change? *' (with a 'Change Job Details' link), and 'Who will be the manager after this change?'. At the bottom, there is a 'Close' button, a 'Save for Later' button, and a 'Submit' button. A red circle '3' is next to the 'Submit' button.

Completing Your Tasks & Checking Notifications

Checking Your Notifications

STEP 6:

Notifications are separate from tasks and are accessed via the bell icon:

Click the **bell icon** in the top right corner of the screen (the red badge shows how many unread notifications you have)

Notifications keep you updated on changes, completed processes, or system updates and do not require action

The screenshot displays the Ambient user interface. At the top, a header bar shows the user's name "On behalf of: Michael Scott" and the Ambient logo. A search bar is located in the top right. In the top right corner, there are three icons: a chat bubble, a bell icon with a red badge showing "26", and a document icon with a red badge showing "13". The bell icon is highlighted with a red box.

The main content area is titled "Notifications". It features a sidebar on the left with navigation options: Home, Organization, Personal, Team, More, and Saved. The "Personal" section is selected. The notifications list shows several items, including "Promotion: Ross Geller" (Promote Employee Inbound - Successfully Completed, 13 hour(s) ago), "Promotion: Ross Geller" (Promote Employee Inbound - Denied, 14 hour(s) ago), "Data Change: Ross Geller" (Change Job - Successfully Completed, 18 hour(s) ago), "Data Change: Ross Geller" (Change Job - Successfully Completed, 18 hour(s) ago), "Home Contact Change: Michael Scott" (Home Contact Change - Successfully Completed, 1 day(s) ago), and "Enroll in Content for Manager Enroll: Nano Tips for Empathetic Leadership with India Gary Martin".

The detailed view of the "Promotion: Ross Geller" notification is shown on the right. It includes the title "Promotion: Ross Geller", the time "13 hour(s) ago", and a link to "Details".

References

Key Things to Know

- Tasks with deadlines will show a due date. Overdue tasks remain in your All Items list until you complete them
- Completed tasks move to **Archive** in the left panel. You can go back and review past actions at any time
- The "**Awaiting Your Action**" card on your homepage gives you a quick view of pending tasks without opening My Tasks
- Your homepage also shows "**Timely Suggestions**" with reminders like updating your emergency contacts or completing outstanding items
- The **Announcements** section on the right side of your homepage shows company-wide updates and news
- Enable **push notifications** on your phone to receive real-time alerts when a new task arrives
- You can access My Tasks from both desktop and the Workday mobile app. Tasks sync across both

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.