



## Inbox Filters

### Overview

This is a process that any employee can initiate. Inbox filters enable you to narrow the list of inbox items to specific business process types and tasks that require action. Inbox filters can be created and customized using the “Create Inbox Filter” task. If you’d like to view the inbox filters you have set up, you can run the “My Inbox Filters” report. This job aid will show you how to create inbox filters, use inbox filters, and edit previously created inbox filters.

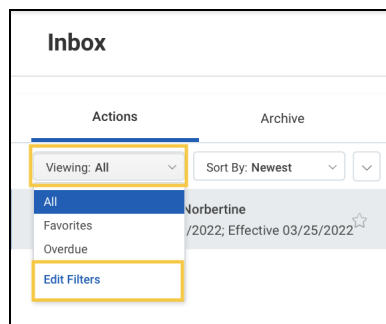
### Create an Inbox Filter

*Security Roles: Employee as Self*

1. Navigate to your Workday Inbox.



2. Within the Inbox, select the **filter field** (“Viewing: All” in the picture below). This opens a dropdown menu where you can then select **Edit Filters**.



3. On the My Inbox Filters page that appears, you will be able to view any previously created filters. To create a new filter, select **Create Inbox Filter**.



4. In the **Description** field, type the title of the filter.

**Create Inbox Filter**

Inbox Filter (empty)

Description \* Requests coming due

Maximum Row Limit 200

**View Definition**

\*  For all Business Processes  
 Business Process Type(s)

Task(s)

5. Under the **View Definition** section, you can choose to apply an inbox filter for all business processes or for one or more business processes type(s). For this job aid, we will create the filter on the **Request** business process type.

**View Definition**

\*  For all Business Processes  
 Business Process Type(s) x Request

Task(s)

6. The **Tasks** prompt allows you to further refine your filter for either common tasks such as approvals, Attach Document, To Dos, or for tasks that are already in your inbox. For this job aid, going along with the Request business process, we will select the task of **Close Request**.

**Create Inbox Filter**

Inbox Filter (empty)

Description \* Requests coming due

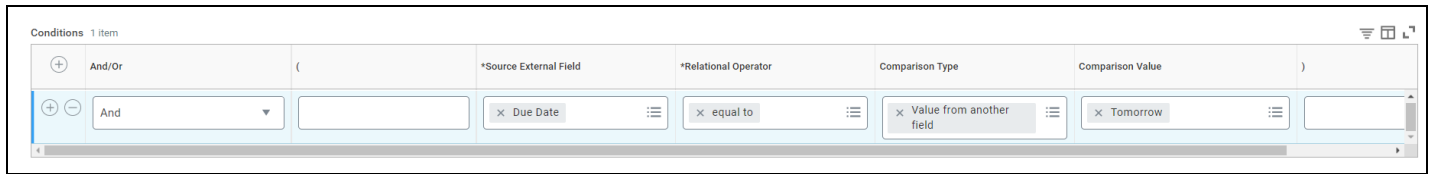
Maximum Row Limit 200

**View Definition**

\*  For all Business Processes  
 Business Process Type(s) x Request

Task(s) x Close Request

7. The Conditions part of the screen allows you to determine what part of the business process the filter will act on. The + icon allows you to add conditions. For the example below, we will have our filter act on the **Due Date** choose the following for each prompt:
  - a. **And/Or:** And
  - b. **Source External Field:** Due Date
  - c. **Relational Operator:** Equal to
  - d. **Comparison Type:** Value from another field
  - e. **Comparison Value:** Tomorrow
  - f. *\*Maximum Row Limit defaults in but is editable*



8. Select **OK**.

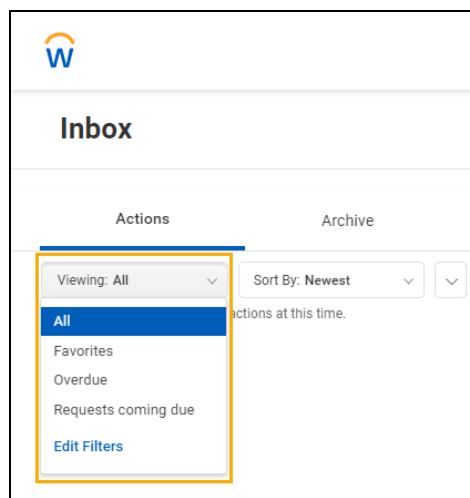
### Applying Inbox Filters

*Security Roles: Employee as self*

1. Navigate to your Workday **Inbox**.



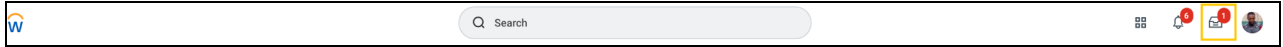
2. Select the **filter field** (“Viewing: All” in the picture below). Select the inbox filter that was created (“Requests coming due” in the picture below). Once the inbox filter has been selected, the inbox will be filtered to only display tasks meeting the criteria set in your filter.



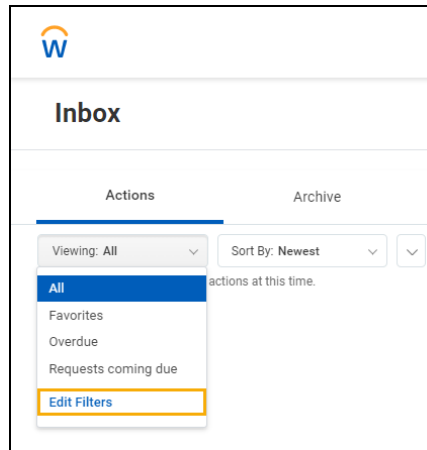
## Edit Existing Inbox Filters

Security Roles: Employee as self

1. Navigate to your Workday Inbox.



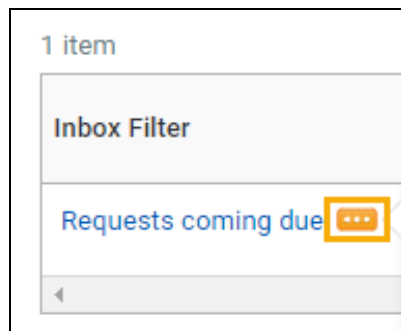
2. Select **Edit Filters** from the **Viewing** drop down menu.



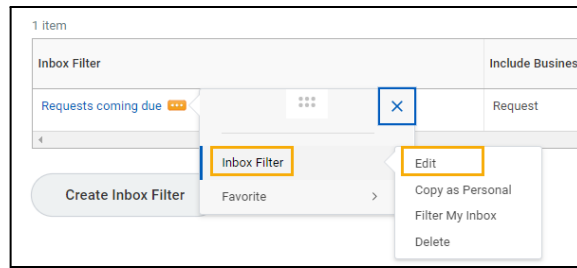
3. Find the inbox filter that was created (Ex. Requests coming due).

| Inbox Filter        | Include Business Process Type(s) | Task(s)       |
|---------------------|----------------------------------|---------------|
| Requests coming due | Request                          | Close Request |

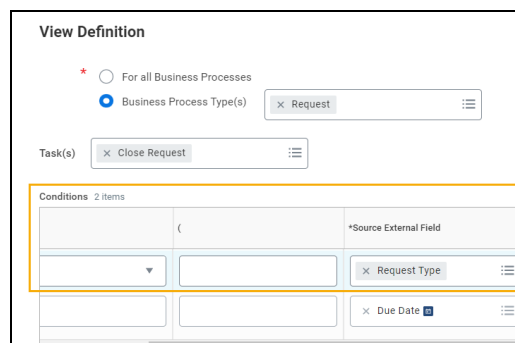
4. From the Requests Coming Due filter, hover next to the filter name until you see the Related Actions icon and select it.



5. Hover over **Inbox Filter** and select **Edit** from the secondary menu.



6. Press the + button under the Conditions part of the screen to add a row to the top of our inbox filter.



7. Select **OK** to save your changes.