Workday Inbox filters

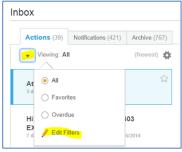
Create or Edit Personal Inbox Filters

An Inbox filter enables you to limit the action items you see in your Inbox. You can create a personal Inbox filter that is available only to you in your Inbox. You can define an Inbox filter for specific or all business processes, and then define conditions that must be met for the Inbox to display the action items. Workday retains your selections on Inbox tabs only until you navigate elsewhere.

Below are examples of inbox filters that can be created by users or as a system filter:

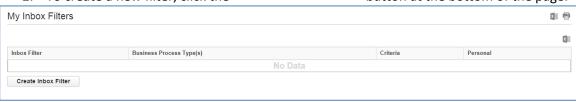
Example 1: Create Filter for All To-Dos

1. From the inbox, click the Down Arrow button and click Edit Filters:

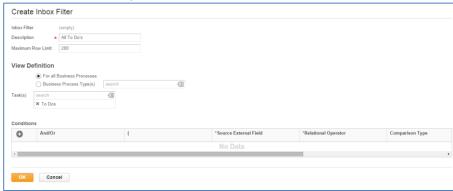


Note: You can also get here from the My Inbox Filters report.

2. To create a new filter, click the button at the bottom of the page.



- 3. Complete the following:
 - a. Type a Description
 - b. Check if the filter is "For All Business Process" or for a specific "Business Process". For example, for Hire Only.
 - c. Under Task(s), define what type of step in the Business Process. For this example, a filter is created for To Do's. Another option is to filter on Approvals only as this is a task that requires a timely action.



- 4. Click the button and then the button.
- 5. Return to the Inbox and select the filter from the drop down menu from Actions Viewing tab.

Result: When using the inbox, select the All To Do's filter to display/process those items only:

