

Inbox Filters

Overview

Inbox filters allow you to show or hide Inbox items based on data logic. This function is useful for Workday users receiving a high volume of Inbox items.

Who Does This: Employee

Things to Know:

- You may create and edit Inbox filters.
- Inbox filters allow you to show and/or hide Inbox items related to a specific business process.
- Conditions allow you to further customize your filters.
- This job aid is broken into three sections:
 - [Create Inbox Filter](#) – How to access My Inbox Filters and Create Inbox Filter
 - [Filter to Show Tasks](#) – Create a filter to show specific tasks
 - [Filter to Hide Tasks](#) – Create a filter to hide specific tasks

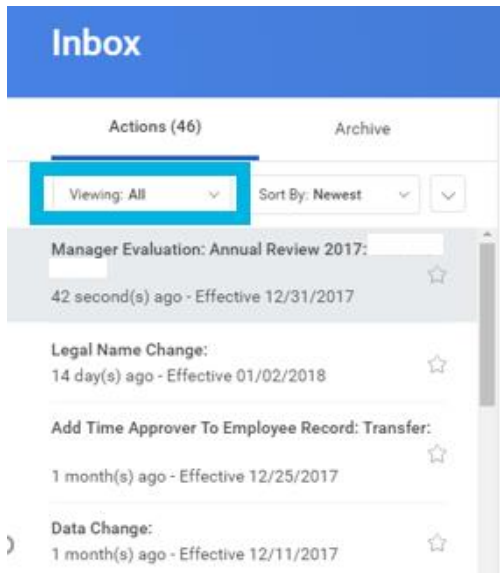
Create Inbox Filter



Inbox

Step 1

Choose the **Inbox** worklet.



Step 2

Select the **Viewing** drop-down.

Inbox

Actions (46)

Archive

Viewing: All

Sort By: Newest

All

Favorites

Overdue

Edit Filters

Annual Review 2017:

ative 12/31/2017

Step 3

Choose **Edit Filters**.

My Inbox Filters

0 items

Inbox Filter

Create Inbox Filter

Step 4

Choose **Create Inbox Filter**.

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[Go to Filter to Hide Tasks](#)

[Go to FAQ's](#)

Filter to Show Tasks

Create Inbox Filter

Inbox Filter (empty)

Description *

Maximum Row Limit 200

View Definition

Start by following the instructions above to [Create Inbox Filter](#). Then resume with Step 1 below to create a filter that will show specific tasks in your Inbox.

Step 1

Enter a Description which will appear as the filter name in the Viewing drop-down (see Step 6 below).

View Definition

For all Business Processes

Business Process Type(s)

Task(s)

Conditions 0 items

+ And/Or

Step 2

Under View Definition, use the list icon to select the Business Process Type(s) that you would like to show when the filter is in use.

View Definition

For all Business Processes

Business Process Type(s)

Task(s) 3

Conditions 0 items

+ 4 And/Or

View Definition as Text Business Process Type(s) in the selection list Complete Manager Evaluat

5

OK Cancel

Step 3

Use the list icon to select and narrow the Task(s) that show when the filter is in use.

Step 4

Use the plus icon to add Conditions to further customize the filter as needed.

Step 5

Click **OK**.

Inbox

Actions

Archive

6

Viewing: All

Sort By: Newest

All

Favorites

Overdue

7

Annual Reviews

Edit Filters

Inbox

Actions (46)

Archive

Viewing: Annual R...

Sort By: Newest

Manager Evaluation: Annual Review 2017:

29 minute(s) ago - Effective 12/31/2017

Step 6

Return to your Inbox and select the **Viewing** drop-down.

Step 7

Select the filter you created.

Step 8

Review your Inbox tasks that show when the filter is in use.

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Filter to Hide Tasks

Create Inbox Filter

Inbox Filter (empty)

Description *

Maximum Row Limit 200

View Definition

Start by following the instructions above to [Create Inbox Filter](#). Then resume with Step 1 below to create a filter that will hide specific tasks in your Inbox.


Step 1

Enter a Description which will appear as the filter name in the Viewing drop-down (see Step 9 below).


Conditions 0 items

And/Or


Step 2

Under Conditions, use the plus icon  to add a row.


*Source External Field

Business Process Name 


Step 3

Use the list icon  to select the desired Source External Field (i.e. Business Process Name, Due Date).


*Relational Operator

not in the selection list 


Step 4

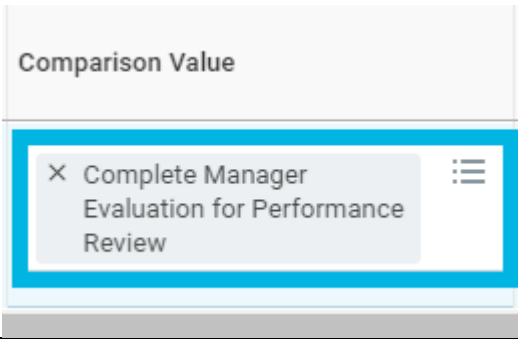
Use list icon  to select the desired Relational Operator (i.e. not in the selection list, less than or equal to).

Comparison Type


Value specified in this filter 

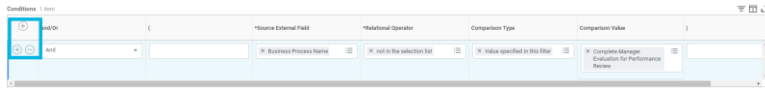
Step 5

Use list icon  to select the desired Comparison Type (defaults to Value specified in this filter).




Step 6

Use list icon  to select the desired Comparison Value (i.e. Business Process, date).



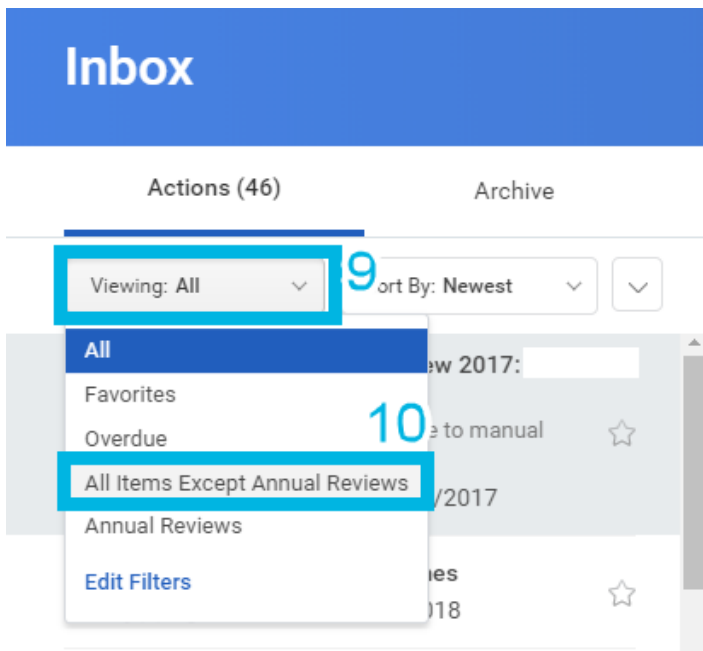
Step 7

Use the plus icon  to add additional rows as needed.



Step 8

Select **OK**.



Step 9

Return to your Inbox and select the **Viewing** drop-down.

Step 10

Select the filter you created.

Inbox

Actions (46)

Archive

Viewing: All Items ...

Sort By: Newest

Legal Name Change:
14 day(s) ago - Effective 01/02/2018



Add Time Approver To Employee Record: Transfer:

1 month(s) ago - Effective 12/25/2017



Data Change:

1 month(s) ago - Effective 12/11/2017



Edit Other IDs:

1 month(s) ago



Step 11

Review your Inbox tasks noting items are hidden when the filter is in use.

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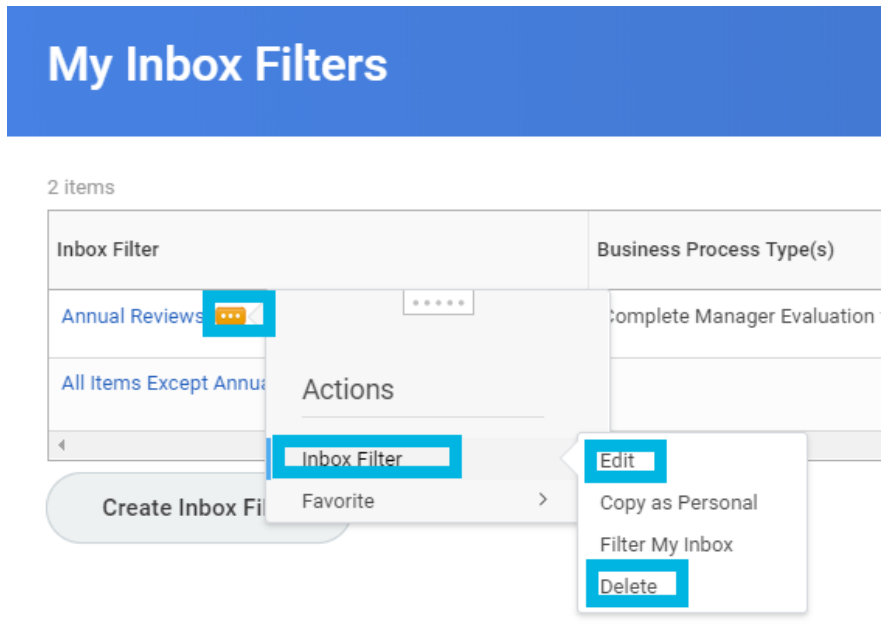
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FAQ's

How do I edit My Inbox Filters? From your Inbox, select the **Viewing** drop-down and choose **Edit Filters**. From My Inbox Filters, select the **related actions** for the Inbox Filter you want to edit. In the Actions Menu, select **Inbox Filter** and then **Edit**. To delete a filter, follow this same path and click **Delete**.



What if I don't know the business process name(s) that I need for my filter? Find a similar task in your Inbox Archive and view the Process History to identify the Business Process. Or you may submit an IT ticket for assistance with the data logic.

