

Workday Inbox Filters



VUMC employees can create personalized filters for certain tasks in their Workday Inbox. Follow the steps below to create a filter for your Workday Inbox.

From the Workday Homepage:

1. Select the **Inbox** icon.
2. Select the **Viewing: All** dropdown menu.
3. Select **Edit Filters**.
4. Your existing inbox filters will appear here if you have created them previously. Select **Create Inbox Filter**.
5. Enter a **Description**. This can be a specific task, feature, person, etc.
6. Under View Definition, select whether this will be **For All Business Process Types** or select specific **Business Process Types**.
7. Select or search for the **Task(s)** from the menu.
8. Select the **+** icon to add a condition to the filter.
9. Choose **And** or **Or** from the dropdown menu.
10. Select the **Source External Field**.
11. Select the **Relational Operator**.
12. Select the **Comparison Type**.
13. Select the **Comparison Value**. You can select multiple values in this field.
14. Select **OK**.

Inbox

Viewing: All

- All
- Favorites
- Overdue
- Delegated to Me
- Edit Filters

My Inbox Filters

0 items

Inbox Filter

Create Inbox Filter

Create Inbox Filter

Inbox Filter (empty)

Description * Artie Chokie

Maximum Row Limit 200

View Definition

* For all Business Processes

Business Process Type(s)

Task(s)

- Common Tasks
- Tasks in Inbox
- Search

Conditions	1 item	*Source External Field	*Relational Operator	Comparison Type	Comparison Value	Order
+	And	x Initiating Worker	x in the selection list	x Value specified in this filter	x Artie Chokie (1234567)	

OK Cancel



Workday Inbox Filters

From the My Inbox Filters Page:

1. Under My Inbox Filters, you will see all of the inbox filters you have created in a table. Select **Done**.
2. Return to your Workday Inbox by selecting the **Inbox** icon.
3. To find created filters, select the **Viewing: All** drop down menu. Created filters will appear in the menu.

My Inbox Filters

1 item

🔍 📄 📑 🗑️ 🔖 📄

Inbox Filter	Include Business Process Type(s)	Task(s)	Criteria	Personal
Artie Chokie		Approvals	Initiating Worker in the selection list Artie Chokie (1234567)	Yes

1

Inbox

Actions
Archive

Viewing: All 3
Sort By: Newest

- All
- Favorites
- Overdue
- Delegated to Me
- Artie Chokie
- Edit Filters

- iplinary Action - Verbal:
)
/06/2023
- iplinary Action - Verbal:
)
4/04/2023

QUESTIONS?

Please email BusinessEducation@vumc.org.