VUMC workday. **BUSINESS EDUCATION**

Workday Inbox Filters

In Workday, employees can filter their inboxes by using a pre-created filter or by creating a personal filter. Follow the steps below to access the inbox filters for your Workday Inbox.

From the Workday Homepage:		nbox	
1. Select the Inbox icon.		Actions Archive	k
2. Select the Viewing: All drop-down menu.	My Inbox Filters	ewing: All v 2 By: Newest v	
3. Select Edit Filters.	Inbox Filter	vorites	· · ·
4. Your existing inbox filters will appear here. You should see To Dos, Step for	<u>۲</u>	erdue 6/24/2023 legated to Me	
Manager, Tasks About Me and Approvals, along with any previously created filters. Select Create Inbox Filter .	Step for Manager Ste	provals ep for Manager sks About Me	
5. Enter a Description . This can be a specific task, feature, person, etc.	Tasks About Me To	Dos ti Filters	i .
6. Under View Definition, select whether this will be For All Business Process	Favorites		
Types or select specific Business Process Types.	Overdue	Create Inbox Filter	
7. Select or search for the Task(s) from the menu.	Delegated to Me	Inbox Filter (empty)	
8. Select the + icon to add a condition to the filter.	Create Inbox Filter	Description * Artie Chokie	5
9. Choose And or Or from the dropdown menu.	View Definition		
10. Select the Source External Field .	* () For all Business Processes		᠂᠆᠆᠂᠂᠂᠂
11. Select the Relational Operator .		Request Time Off	
12. Select the Comparison Type .	Task(s)	Common Tasks	>
13. Select the Comparison Value . You can select multiple values in this field.		Tasks in Inbox	> 7
14. Select OK.		Şearch	:=
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+ And/Or (*Source External Field *Relational Operation	or Comparison Type Co	omparison Value)	Order
And 9 And 10 × in the selection of the selectio	ction list 11 × Value specified in this 12	× Artie Chokie … :≡ 13	▼ ▼

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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 along with pre-created filters from the organization. For a complete list of the pre-created filters, see **page 3**.

2. In your inbox, you can access these filters by selecting **Viewing: All**. A list will populate, including any created filters.

My Inbox Filters				×III				
8 items			ד יי 🔳 🖪					
Inbox Filter	Include Business Process Type(s)	Task(s)	Criteria	Personal				
To Dos		To Dos						
Step for Manager			Workflow Step Security Group any in the selection list Manager, Manager's Manager					
Tasks About Me			About Worker in the selection list Current Worker					
Approvals		Approvals		_				
Favorites					Inbox			
Overdue					Actio	ons	Archive	1
Delegated to Me					Viewing: All	~	Sort By: Newest	\sim
Artie Chokie				Yes	All		nployee Performance	
					Favorites Overdue		6/24/2023	☆
					Delegated to M Approvals	Vle		(
					Artie Chokie	2		
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					To Dos	Ne		:
					Edit Filters		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	- 5



Workday Inbox Filters

Inbox Filter Options				
All	Shows all items in your inbox			
Favorites	Items you have marked with a star			
Overdue	Items with a required action past its due date			
Delegated to Me	Items another user has set you up as a delegate to act on their behalf			
Approvals	Items that require your approval before moving to the next step of a business process (these could also be in the Step for Manager filter as well)			
Step for Manager	Items requiring your action related to staff that report to you within your Supervisory Organization or the manager you are supporting (e.g. Absence Requests, Evaluations)			
Tasks About Me	Tasks where you are the subject of the task (e.g. Self Evaluation)			
To Dos	Items that require your action (these could also be in the Step for Manager filter as well)			
Edit Filters	Use to create your own inbox filter (see Page 1 and 2 for more details)			

QUESTIONS? Please email <u>BusinessEducation@vumc.org</u>.