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:

1. Select the **Inbox** icon.

2. Select the **Viewing: All** drop-down menu.

3. Select **Edit Filters**.

4. Your existing inbox filters will appear here. You should see To Dos, Step for Manager, Tasks About Me and Approvals, along with any previously created filters. 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.**

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

8 items

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				
Overdue				
Delegated to Me				
Artie Chokie ①				Yes

Inbox

Actions   Archive

Viewing: All ⌄   Sort By: Newest ⌄

- **All**
- Favorites
- Overdue
- Delegated to Me
- Approvals
- Artie Chokie ②
- Step for Manager
- Tasks About Me
- To Dos

Edit Filters

Employee Performance
6/24/2023

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 BusinessEducation@vumc.org.