

CREATING INBOX FILTERS

IMPROVING YOUR WORKFLOW

THIS JOB AID APPLIES TO ALL WORKDAY USERS WITH BUSY WORKDAY INBOXES. THIS IS TYPICALLY USERS INITIATING, REVIEWING, AND/OR APPROVING HR AND PAYROLL TRANSACTIONAL WORK.

WHAT DO INBOX FILTERS DO?

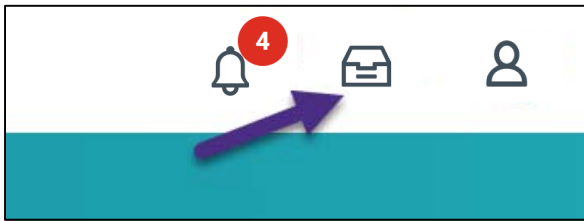
Inbox filters are customizable filters that allow you to quickly sift through all of the items in your Workday inbox to parameters you have set. The primary ways users design these filters is to isolate specific:

- Individual(s) you support
- Supervisory organization(s) you support
- Business processes you initiate, review, or approve
- Any combination of the above

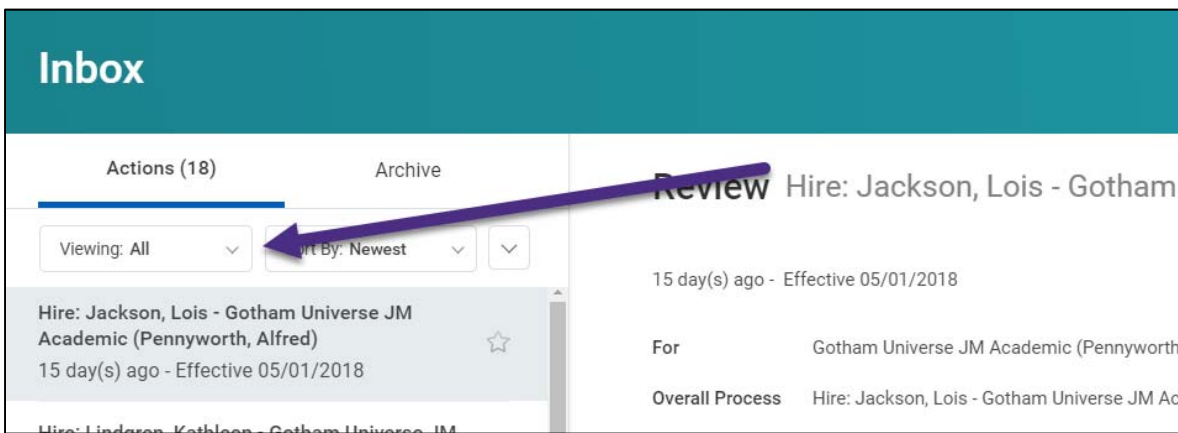
HOW TO CREATE AN INBOX FILTER

Use the steps below to setup the inbox filter of your choice.

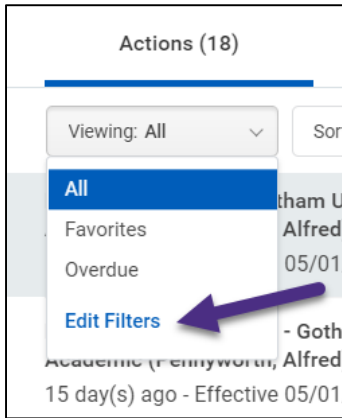
Step 1: Log in to Workday, and go to your Inbox.



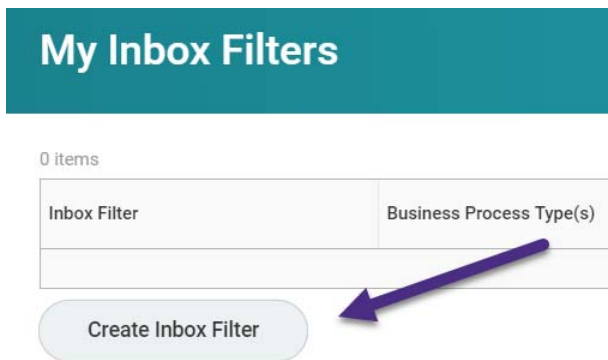
Step 2: Select the Viewing: All dropdown menu.



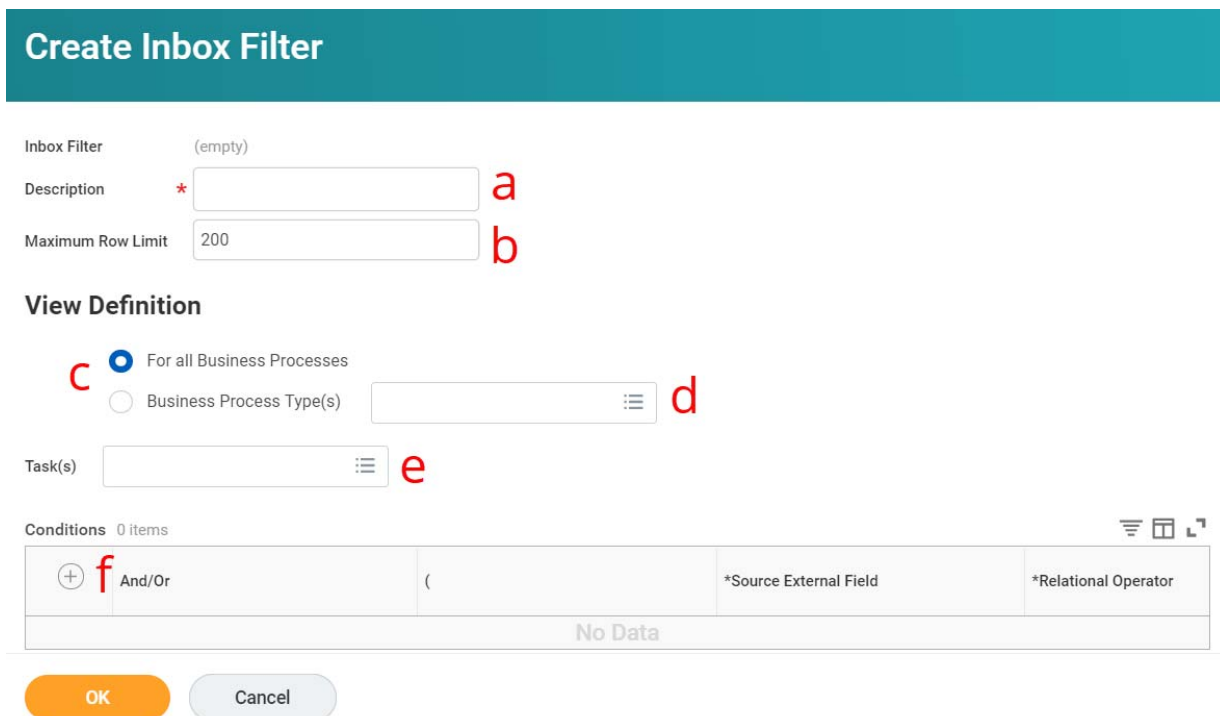
Step 3: Select Edit Filters.



Step 4: Select Create Inbox Filter.



Step 5: Design the filter.



- a. **Description:** Choose a meaningful description for what you are designing. This is the name of the filter that will display in the filter menu. If you are going to have a lot of filters, we recommend adding a numbering system in front of the description so you can prioritize which ones you use the most.
- b. **Maximum Row Limit:** The maximum row limit will control how many records at a time will return. We recommend keeping this 200 or fewer to avoid performance/loading problems.
- c. **Business Process Decision:** Select whether you want to return all business processes or a specific kind.
- d. **Business Process Type(s):** If you select specific type(s) of business processes, use the search to find the ones you want to include in the filter. Be careful to use general search terms like "time off" so you don't accidentally filter process you wanted!
- e. **Task(s):** Tasks include actions in the system like Approvals, Attach Document, To Dos, etc. Select these if you want to sort by the task type.
- f. **Conditions:** The condition + symbol will add one or more conditions to your filter. If you are looking to add supervisory organization (sup org) or worker, this is where you will do this.
 - a. **To add supervisory organizations**, select the following:
 - i. Source External Field: CF FT About Worker Supervisory Org
 - ii. Relational Operator: contains
 - iii. Comparison Type: Value specified in this filter
 - iv. Comparison Value: depending on what you need, you can either specify the exact name of one sup org, or add part of the name of multiple sup orgs. (e.g. "ISC: Training and Communications (Wonder, Woman)" or "ISC")
 - v. Build a second AND condition (+) identical to the first, except make the Source External Field: LRV Initiators Hierarchy. All other fields should be identical.
 - b. **To add multiple supervisory groupings** (e.g. all ISC orgs, and all FSB orgs), select the following:
 - i. Follow all the same steps as item a. Open a parentheses on the first condition, and close it after the second.
 - ii. Then, add a third condition with an OR command identical to the first condition, but choose the second grouping or individual sup org with different naming convention(s). Open a parentheses on this one.
 - iii. Add a fourth condition with the AND command identical to the second condition, but with the new grouping or individual naming convention(s). Close the parentheses on this one.
 - iv. Follow these steps for as many different naming conventions as you need.

- c. **To add worker(s)**, select the following:
 - i. Source External Field: Worker
 - ii. Relational Operator: exact math with the selection list
 - iii. Comparison Type: Value specified in this filter
 - iv. Comparison Value: search for the names of the worker(s) you want to include in the filter.

Sample screenshot of Supervisory Organization filter:

The screenshot shows the 'View Inbox Filter' interface. At the top, there is a teal header with the title 'View Inbox Filter' and icons for grid, list, and print. Below the header, the 'Inbox Filter' section shows a search icon and a description: '1. Gotham Universe Orgs'. The 'Maximum Row Limit' is set to 200. The 'View Definition' section has two radio buttons: 'For all Business Processes' (selected) and 'Business Process Type(s)'. Below this, the 'Task(s)' field is empty. The 'Conditions' section shows 2 items in a table:

And/Or	(Source External Field	Relational Operator	Comparison Type	Comparison Value)
And		CF FT About Worker Supervisory Org	contains	Value specified in this filter	Gotham Universe	
And		LRV Initiators Hierarchy	contains	Value specified in this filter	Gotham Universe	

Sample screenshot of Business Process Types filter:

The screenshot shows the 'Create Inbox Filter' interface. At the top, there is a teal header with the title 'Create Inbox Filter'. Below the header, the 'Inbox Filter' section shows '(empty)'. The 'Description' field contains '2. Time Off and Time Entry' with a red asterisk. The 'Maximum Row Limit' is set to 200. The 'View Definition' section has two radio buttons: 'For all Business Processes' and 'Business Process Type(s)' (selected). Below this, a dropdown menu is open showing three options: 'Request Time Off', 'Enter Time', and 'Correct Time Off'. The 'Task(s)' field is empty. The 'Conditions' section shows 0 items in a table:

(+)	And/Or	(*Source External Field	*Relational Operator	Comparis
No Data					

Step 6: Test the filter is working over time! Make sure you are catching everything you want to catch.