Managing Your Inbox

In Workday, the Inbox provides a list of tasks that you need to do, tasks you have initiated. From the Profile menu you can also access notifications regarding these business processes.

Creating Filter

There are three different Inbox/Workfeed filters that you can use:

1. Basic filters for the Inbox are found on the Inbox slide out tab. These filters will apply only to the displayed page, so to filter the entire Inbox click the View All.
   - In the top right corner of the Inbox select the filter icon. This will open the filter fields.
   - Click in the filter fields to choose the available filters, shown in a dropdown, for that column.

2. There are also three basic sort options.
   - In the top right corner of the Sort By: window select the method that you would like to use to sort your Inbox.

3. To create a filter for conditions not found in the basic Inbox Viewing pane, click Edit Filters, then Create Inbox Filter to open the Create Inbox Filter page.

![Create Inbox Filter](image)
To create a filter by business process only:

- Enter the business process name in the **Description** field.
- Choose the Business Process Type(s) radio button and select the business process type from the available menu (shown at right). More than one business process type can be chosen.
- Click OK

To create a filter by task only:

- On the Create Inbox Filter page, enter the name of the task in the **Description** field.
- Select the **For all Business Processes** radio button.
- In the Task(s) field select the task using the menu prompt. The only selections you will have are those presently in your Inbox.

**Note:** Choosing **Approve** will only return tasks designated with the Review button

To create a filter using Conditions:

To open the Create Inbox Filter page: In the basic Inbox Viewing pane, click **Edit Filters**, then **Create Inbox Filter** to open the Create Inbox Filter page.

- Enter the name of the filter in the **Description** field.
- Choose the **Business Process Type(s)**. As not all condition fields are valid for all business processes, it is important to select the correct ones.
- The Task(s) field is not necessary.
- Click the plus sign in the Conditions section to open a new row.
- Choose values for the fields using the menu prompts.

**Some useful filters:**

**Filter by Initiator:**

Business Process Type(s): all but Job Requisition are available
Source External Field: Initiator
Relational Operator: In the selection list
Comparison Type: Value specified in this filter
Comparison Value: enter the name of the initiator
**Filter by Initiator and Date:**
SEF: # Days Since Initiated
RO: equal to
CT: Value from another field
CV: enter the number of days needed, so for things initiated today enter 0.
Click the plus sign + to add another line
And / Or field: And
The remaining fields are the same as above.

**Filter by Date:**
Choose business processes
SEF: # Days Since Initiated
RO: equal to
CT: Value from another field
CV: enter the number of days needed, so for things initiated today enter 0.

**Filter by Org:**
Choose business processes
SEF: Organizations Affected
RO: any in the selection list
CT: Value specified in this filter
CV: enter the name of the org. It can be searched for by entering the name of the org owner.
More than one value can be selected in this field.

**Note:** If the filter only contains one line the And / Or field and the parentheses are not needed. All filters created here will be shown on the My Inbox Filters page. Select the related actions arrow next to the filter name and choose Inbox Filter>Filter My Inbox to see the results given by the filter. The filter will also be added to the Filter By pane so it can be easily re-used.

**How Do I Manage My Notifications?**

1. From the Home page view, click on your name.
2. Scroll down to My Account and click.
3. Click Change Preferences.
4. At the bottom of the page you should see the Notification Delivery Preferences section.
5. Next to the Notification Type that you are looking to edit, choose the Email Frequency you would like to receive notifications.
6. Click OK.
7. Click Done.

**Note:** You can also filter and sort your Notifications.