Create Filter

An *Inbox* filter enables you to limit the action items you see in your *Inbox*. You can create a personal *Inbox* filter that is available only to you in your *Inbox*. You can define an *Inbox* filter for specific or all business processes, and then define conditions that must be met for the *Inbox* to display the action items. Workday saves your *Inbox* filters for the duration of your session.

**Steps**

1. Choose to create, copy or edit an *Inbox* filter.
   
   a. To create a new personal filter, access the Create Inbox Filter task.
   
   b. To copy a system filter as a personal *Inbox* filter, access the System Inbox Filters report, and select the Inbox Filter > Copy as Personal related action for the filter. This creates an editable copy for you.
   
   c. To edit a filter, access the My Inbox Filters report, and select the Inbox Filter > Edit related action for the filter.

2. Enter a Description. This title is displayed in filter lists and prompts.

3. (Optional) Enter a Maximum Row Limit to limit the number of items displayed on the Filter My Inbox task. (This does not apply to the Inbox Actions tab.)

4. Under View Definition:
   
   a. Select For all Business Processes, if you want to apply this filter to all business processes.
b. Select Business Process Type(s), and select one or more generic business process definitions from the prompt. For example, you might select Hire, and it would apply to any Hire business process created for any organization.

5. Select one or more Task(s) from the prompt, if you want to further limit the business process tasks you see in your Inbox. The prompt lists all the individual tasks for the business processes you selected above.

6. Under Conditions, add a row and select a condition rule to apply to the filter.

Result

The Inbox filter is available on the Inbox Actions tab. It cannot be shared with others.

To delete a filter, you can access the My Inbox Filters report, and select the Inbox Filter > Delete related action for the filter.

If you designate a system Inbox filter as a favorite (using the Favorite > Add related action), it appears in the Favorite Business Objects worklet. From that worklet, you can select the Inbox Filter > Filter My Inbox related action to run the report using the selected filter.

To Delete a Filter

Go to your inbox filters either by using the downward pointing triangle to the left of the word Viewing: All in your inbox on the Actions tab > Edit Inbox Filters. Then use the related actions off the inbox filter you want to delete and go to Inbox Filter > Delete. Click OK to confirm. You can also just navigate to the task My Inbox Filters.

Example

You could select the Hire business process as the business process type. You could further refine this filter to only show Inbox items for the Create Workday Account task within these business processes.