

Quick Reference Guide: *Create Inbox Filter***Keep in mind**

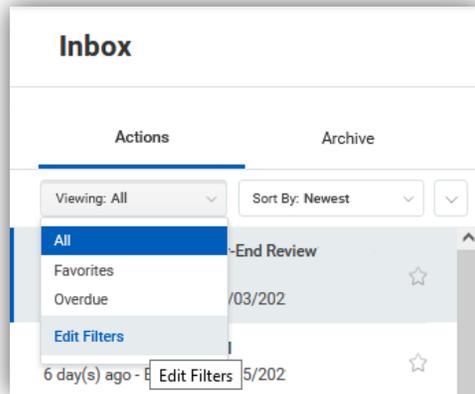
- Only one inbox filter can be applied at a time.
- There is no restriction on how many inbox filters you can create.

Information Needed

- Description
- Criteria for filter (e.g. type of tasks, specific business processes, etc.)

Steps:

1. From the Home page, navigate to your Inbox by clicking on the tray icon  in the top right-hand corner of the Workday screen.



2. From the Inbox, click the Viewing field and select **Edit Filters**.
3. Select **Create Inbox Filter**.
4. Enter a **Description**. This title is displayed in filter lists and prompts.
5. Enter a **Maximum Row Limit** (optional) to limit the number of items displayed on the Filter My Inbox task. (This does not apply to the Inbox Actions tab.)

6. 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 business process definitions from the prompt.

Create Inbox Filter

Inbox Filter (empty)

Description #4*

Maximum Row Limit 200 #5

View Definition

#6 * For all Business Processes
 Business Process Type(s)

Task(s) #7

Conditions 0 Items ☰ ☰ ↻

+	And/Or	(*Source External Field	*Relational Operator	Comparison Type	Comparison Value)	Order
No Data								

7. (Optional) Select one or more **Task(s)** from the prompt if you want to further limit the business process tasks you see in your Inbox. For example, you could create a filter to only show approval steps. If you selected specific business process types in step 6, you can select the “By Business Process Type” prompt option to see all tasks that are part of those business processes.
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9. Click the  icon to exit the Inbox Filters screen. The inbox filter will be available for you to use in your inbox. Remember to remove the filter to view all action items that have been sent to your inbox. (The **Viewing** field will display the filter you are currently using, or **All** if there is no filter applied.)