Creating Personalized Workday Inbox Filters for Equifax I-9 Tasks

Overview

This guide provides step-by-step instructions for I-9 Partners to create optional customized Inbox filters for Workday tasks associated with Equifax I-9. These filters allow you to efficiently manage and view only the tasks of your choice.

The *Equifax I-9 To Dos and Questionnaires* filter has been created for use by all I-9 Partners. This is a general filter that will list only the Equifax I-9 tasks to I-9 Partners assigned to the CSU.
The instructions below provide guidance to create personal filters to narrow the Equifax I-9 tasks in your Inbox based on the specific I-9 responsibilities determined within your CSU.

Below are the two options to narrow filter results:

- *Supervisory Organization (including Subordinates)* option: by selecting the appropriate top-level or top-of-hierarchy Dean/VP or CSU level supervisory organizations, this allows filtering based on the requested portfolio(s).

- *Supervisory Organization* option: this allows granular filtering based on individual supervisory organization(s).

Step 1: Access the Filter Creation Tool

From the Inbox, click on Filters > Manage Filters.

Step 2: Copy the Generic I-9 Filter

1. Locate the existing *Equifax I-9 To-Dos and Questionnaires* filter.
2. Click Related Actions > My task Filters and select Copy as Personal.

Note: This creates a personal filter you can rename and customize. Personal filters cannot be shared; each user must create their own.

Step 3: Customize Filter Conditions

1. Update the Filter Title in the *Description* field to a name of your choosing, then go to the Conditions Table and add a new row.

2. Use default of "And" in the new row.

3. Select the Source *External Field* from one of the options:
   a) ***CF LRV Supervisory Organization for Inbox Filter***: Specific Supervisory Organization(s) or Manager(s). This does not show results for a hierarchy or subordinate organizations – only specified organizations.
   b) ***CF LRV Supervisory Organization (Including Subordinates) for Inbox Filter****:* This allows filtering based on the requested portfolio(s).

NOTE: Select the appropriate top-level or top-of-hierarchy Dean/VP or CSU level supervisory organization(s) in point 5. Inputting all subordinate supervisory organizations is not necessary or advised, since that is already built in.

4. *Relational Operator* field must be 'any in the selection list'.

5. Enter the *Comparison Value*: relevant Supervisory Organization Name, Supervisory Organization IDs, Dean/VPs, or manager names. Multiple values can be selected for broader filters.

   NOTE: If filter 3b is selected, the following information will help you search and input the correct supervisory organization(s)

   - Supervisory Hierarchy Review – RPT0524 can help identify top-level supervisory organizations.
   - **Examples:**
     - Filter for units CHEE or CEMC in Cockrell School of Engineering
       - Supervisory Organization Reference IDs: **SO_0000003526** CHEE (PM) McKetta Department of Chemical Engineering (David Allen (allendt)) and **SO_0000003525** CHEE (JM) McKetta Department of Chemical Engineering (David Allen (allendt))
       - Subtype Level: 5 - Academic Department
       - Supervisory Organization Reference IDs: **SO_0000001470** CEMC (JM) Center for Electromechanics (Michael Lewis (mclewis)) and **SO_0000001471** CEMC (PM) Center for Electromechanics (Michael Lewis (mclewis))
       - Subtype Level: 6 – Organized Research Unit
     - Filter for unit CORE in VP for Research
       - Supervisory Organization Reference IDs: **SO_10009197** CORE (PM) OVPR Core Facilities (Michael Cullinan (mc55853)) and **SO_10009732 CORE** (JM) OVPR Core Facilities (Michael Cullinan (mc55853))
       - Subtype Level: 9 - Misc Other Department

Do not edit the existing conditions.

Step 4: Save and Test Your Filter

- Click OK to save.
- Return to your Inbox and apply the filter.
- Verify that only the relevant I-9 tasks appear.

Tips and Best Practices

- Generic Filter: Always use the generic filter as a backup to ensure you don't miss any tasks due to filter misconfiguration.
- Multiple Filters: You can create as many personal filters as needed (e.g., one for each department, Dean/VP, or manager).
- Troubleshooting: If tasks are missing, check that you used the correct codes or names and that your Supervisory Organization structure is up-to-date.

- To edit an existing filter go to: Manage Filters > Locate the Filter you want to edit > Click related actions > Select “Edit/Delete” from the My Tasks Filters screen.

FAQ

Q: Can I share my filter with others?

A: No, personal filters are for individual use only.

Q: What if my filter doesn’t show all expected tasks?

A: Double-check your selection criteria and ensure you’re using the correct codes or names. Also, verify the Supervisory Organization structure is accurate.