Sysco
At the heart of food and service

workday®

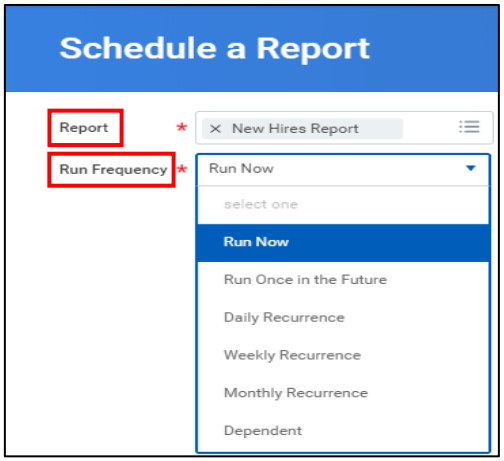
SCHEDULING REPORTS

for Managers and HR

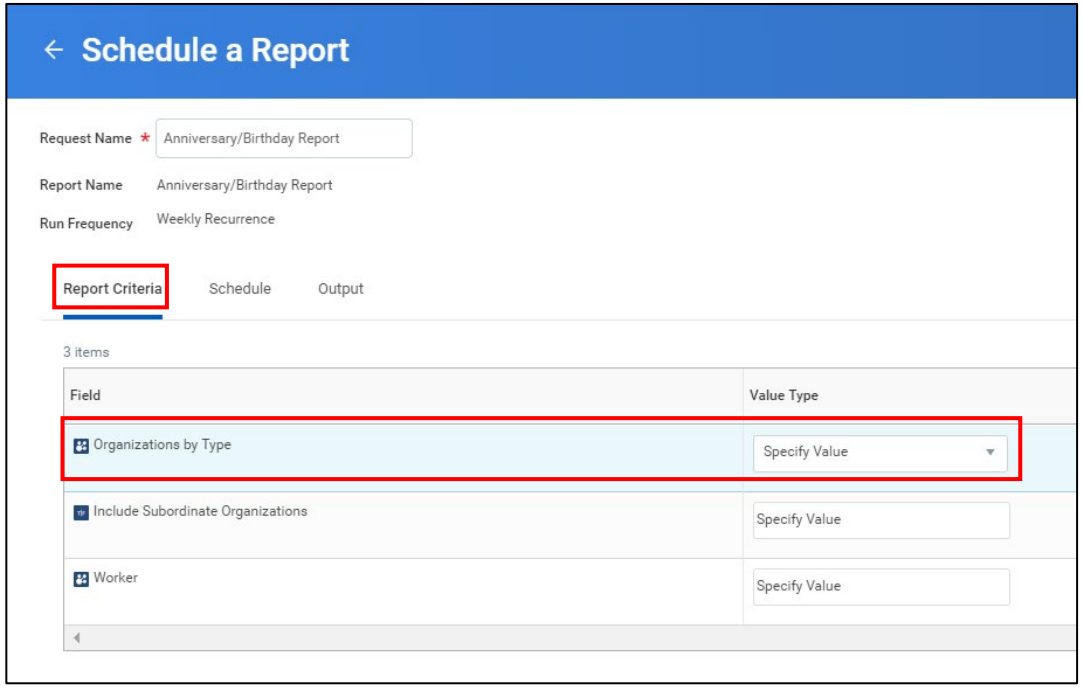
NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.

SCHEDULING A REPORT

Frequently-used reports can be scheduled to run on a daily, weekly or monthly basis or on a specific future date.

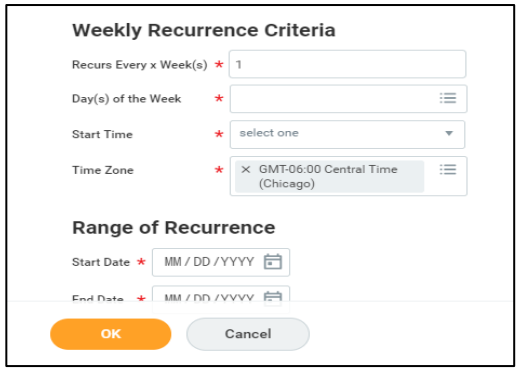


1. Type **Schedule a Report** into the search bar.
2. Select the name of the report to be scheduled (for example: New Hires Report) in the **Report** field.
3. Select a frequency option (for example: Weekly Recurrence) in the **Run Frequency** field.
4. Click **Report Criteria** and select the name of the organization. Check the "Include Subordinates" box if you want all associates (not just direct reports) under that leader or organization to be included.



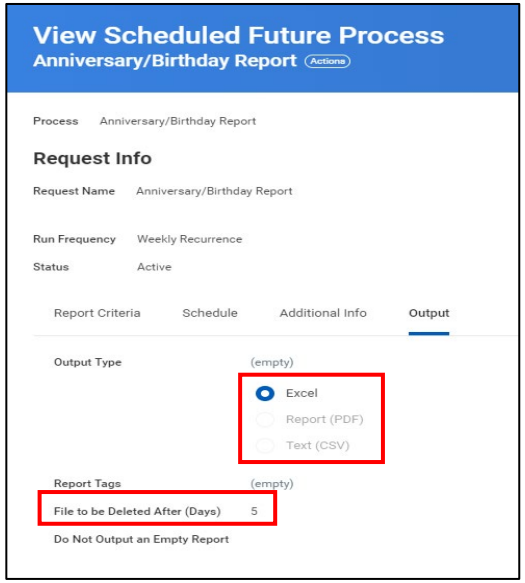
5. Click **Schedule.**

6. Fill in the frequency, day(s), start time, time zone and range of dates (limited to 5 times after the start of the next calendar year).

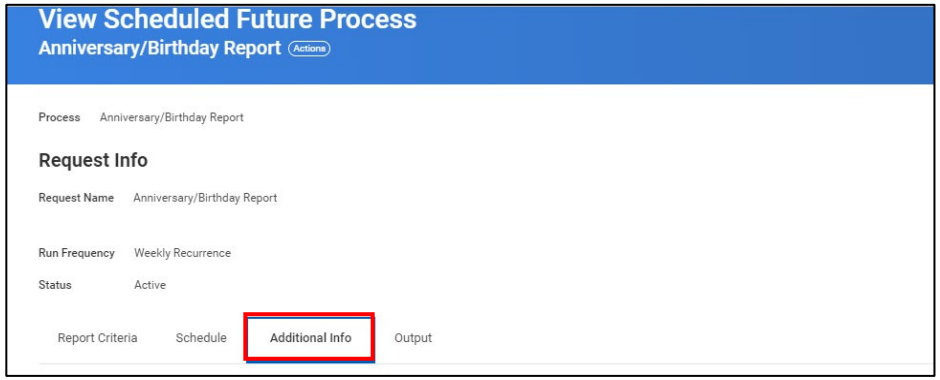


7. Click **Output**.

8. Select the output format. It will default to Excel, but you can change it to PDF or CSV format.
9. If you want the report to be saved for longer than five days, edit the **File to Be Deleted After (Days)** field.

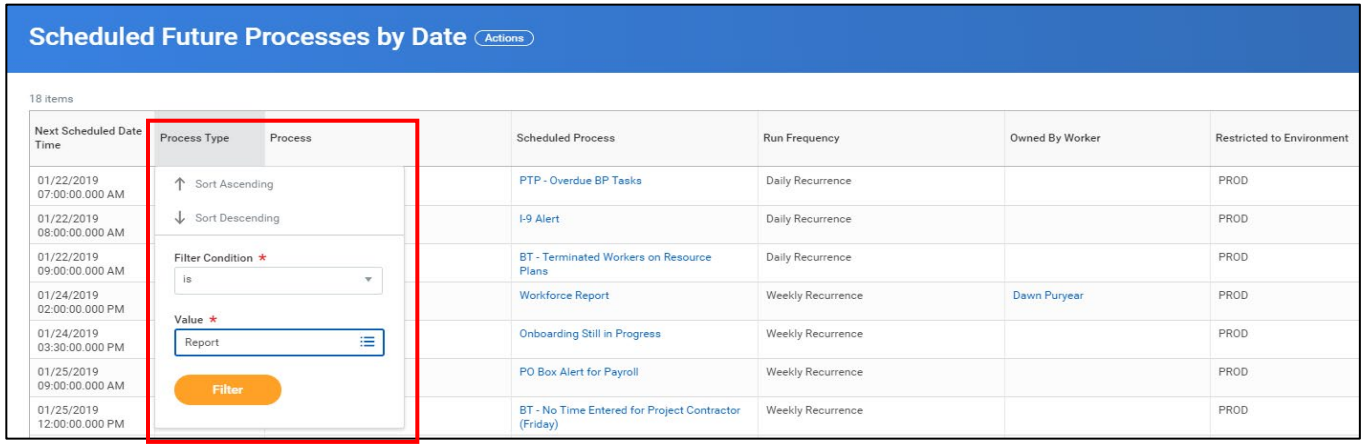
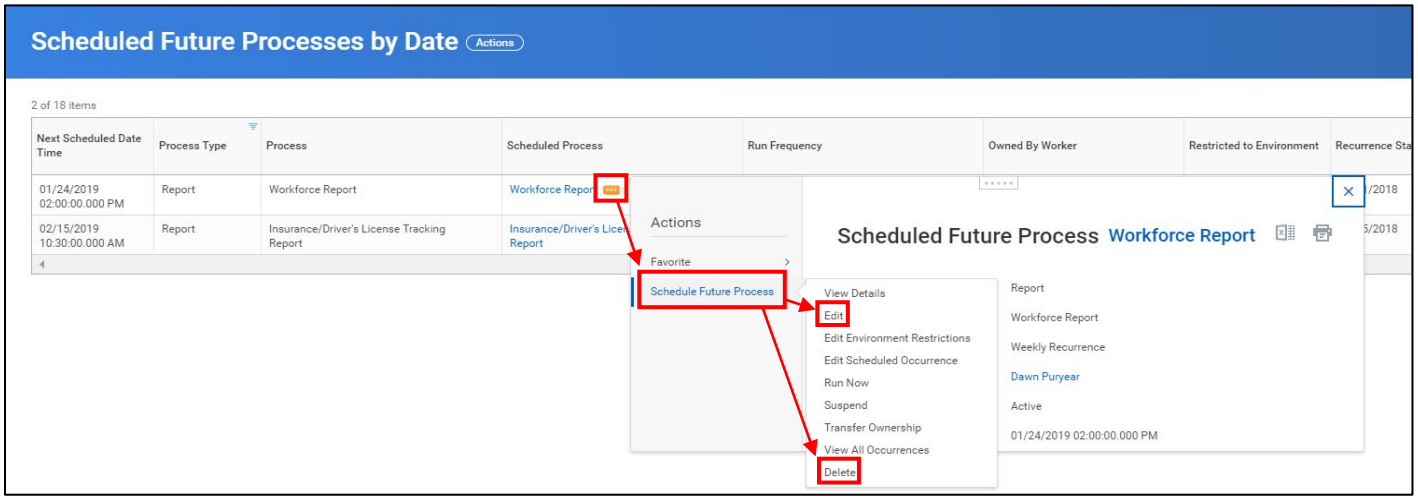


10. A new tab titled **Additional Info** will appear. Select this tab to confirm the scheduled days and times for your selected report.



MODIFYING A REPORT SCHEDULE

1. Type **Scheduled Future Processes by Date** into the search bar.
2. Filter the **Process Type** column by **Report** to locate your scheduled reports. Or filter the **Owned by Worker** column by **Name**.



3. Click the **Action** button next to the report name. Then select **Scheduled Future Process**, then **Edit** or **Delete**. Edit will return to the Report Criteria/Schedule/Output options that were presented in the Schedule a Report process. Delete will take you to a confirmation page.