



SCHEDULING REPORTS

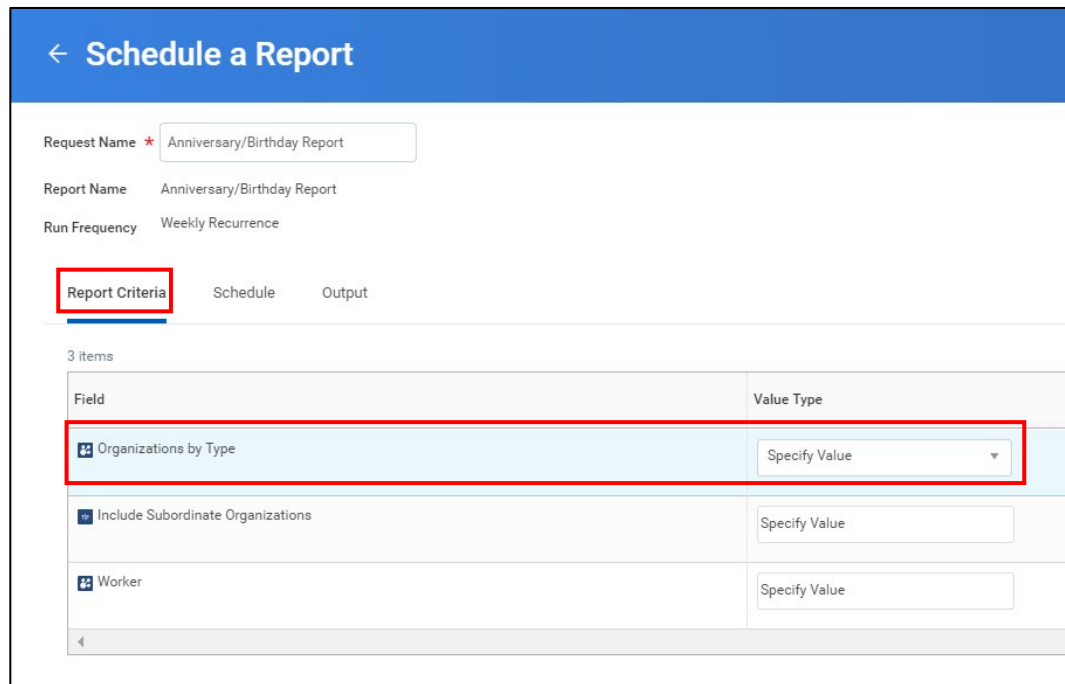
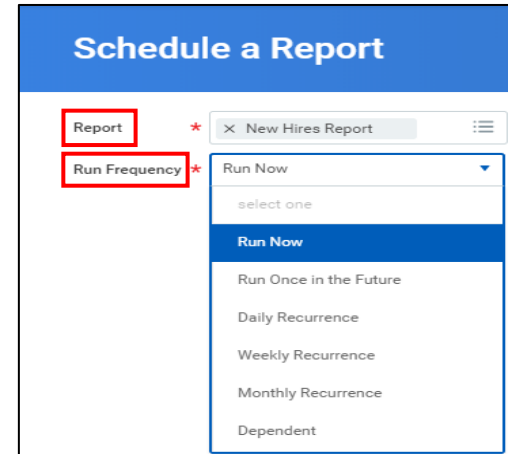
for Managers and HR

**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**.

The screenshot shows the 'Schedule a Report' interface. At the top, there is a blue header with a back arrow and the text 'Schedule a Report'. Below the header, the following information is displayed: 'Request Name * Anniversary/Birthday Report', 'Report Name Anniversary/Birthday Report', and 'Run Frequency Weekly Recurrence'. At the bottom, there are three tabs: 'Report Criteria', 'Schedule', and 'Output'. The 'Schedule' tab is highlighted with a red rectangular box.

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).

The screenshot shows the 'Weekly Recurrence Criteria' dialog box. It contains the following fields: 'Recurs Every x Week(s) * 1', 'Day(s) of the Week *', 'Start Time * select one', and 'Time Zone * GMT-06:00 Central Time (Chicago)'. Below these fields is the 'Range of Recurrence' section, which includes 'Start Date * MM / DD / YYYY' and 'End Date * MM / DD / YYYY'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

7. Click **Output**.

The screenshot shows the 'Schedule a Report' interface, similar to the first screenshot. The 'Request Name * Anniversary/Birthday Report', 'Report Name Anniversary/Birthday Report', and 'Run Frequency Weekly Recurrence' are visible. At the bottom, the three tabs are 'Report Criteria', 'Schedule', and 'Output'. The 'Output' tab is highlighted with a red rectangular box.

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.

View Scheduled Future Process
Anniversary/Birthday Report [Actions](#)

Process Anniversary/Birthday Report

Request Info

Request Name Anniversary/Birthday Report

Run Frequency Weekly Recurrence

Status Active

Report Criteria Schedule Additional Info **Output**

Output Type (empty)

Excel
 Report (PDF)
 Text (CSV)

Report Tags (empty)

File to Be Deleted After (Days) 5

Do Not Output an Empty Report

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

View Scheduled Future Process
Anniversary/Birthday Report [Actions](#)

Process Anniversary/Birthday Report

Request Info

Request Name Anniversary/Birthday Report

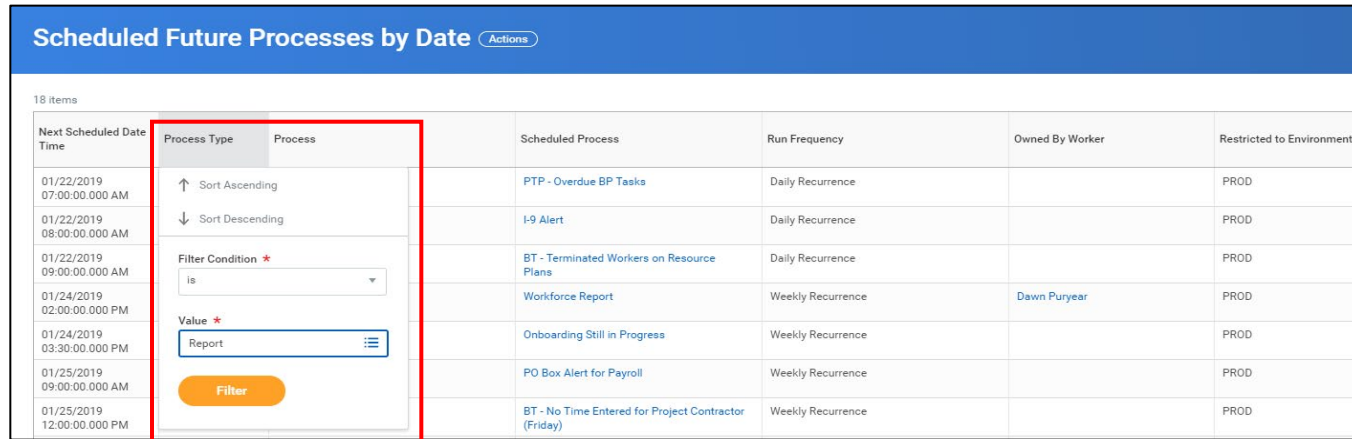
Run Frequency Weekly Recurrence

Status Active

Report Criteria Schedule **Additional Info** Output

MODIFYING A REPORT SCHEDULE

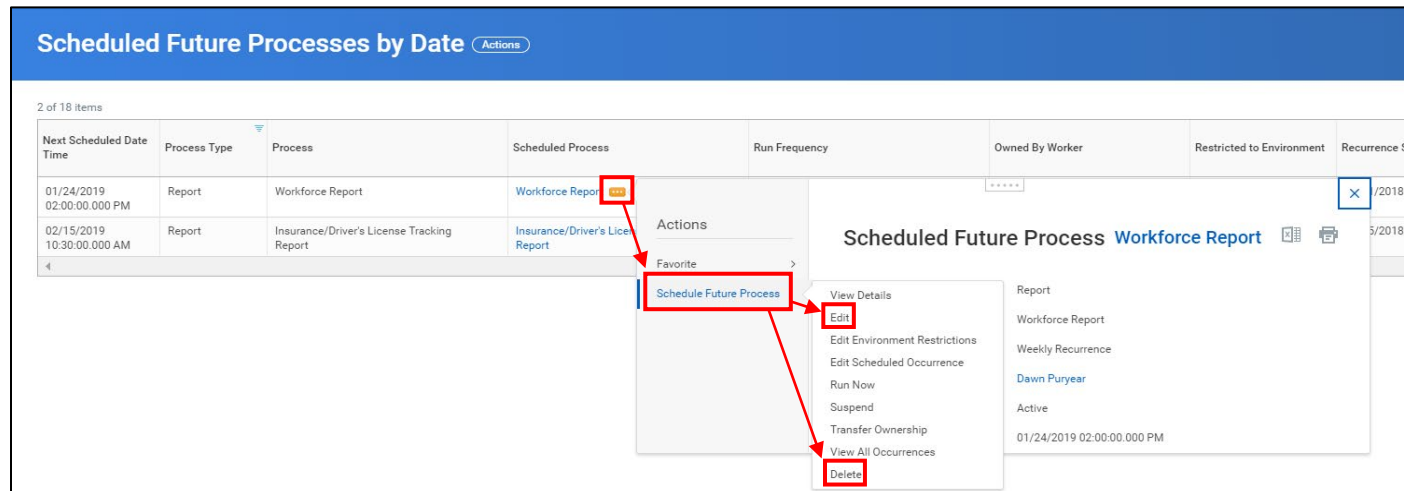
1. Type **Scheduled Future Processes by Date** into the search bar.
2. Filter the **Process Type** column by **Report** to locate your scheduled reports. Or filter the **Owned by Worker** column by **Name**.



The screenshot shows a table titled "Scheduled Future Processes by Date" with 18 items. A filter is applied to the "Process Type" column, showing a dropdown menu with "Report" selected. The table columns are: Next Scheduled Date Time, Process Type, Process, Scheduled Process, Run Frequency, Owned By Worker, and Restricted to Environment.

Next Scheduled Date Time	Process Type	Process	Scheduled Process	Run Frequency	Owned By Worker	Restricted to Environment
01/22/2019 07:00:00.000 AM	Sort Ascending		PTP - Overdue BP Tasks	Daily Recurrence		PROD
01/22/2019 08:00:00.000 AM	Sort Descending		I-9 Alert	Daily Recurrence		PROD
01/22/2019 09:00:00.000 AM	Filter Condition *		BT - Terminated Workers on Resource Plans	Daily Recurrence		PROD
01/24/2019 02:00:00.000 PM	Value *		Workforce Report	Weekly Recurrence	Dawn Puryear	PROD
01/24/2019 03:30:00.000 PM	Filter		Onboarding Still in Progress	Weekly Recurrence		PROD
01/25/2019 09:00:00.000 AM			PO Box Alert for Payroll	Weekly Recurrence		PROD
01/25/2019 12:00:00.000 PM			BT - No Time Entered for Project Contractor (Friday)	Weekly Recurrence		PROD

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.



The screenshot shows the same table as above, but with the "Workforce Report" row selected. The "Actions" menu is open, showing options like "View Details", "Edit", "Delete", "Schedule Future Process", etc. The "Edit" and "Delete" options are highlighted with red boxes.

Next Scheduled Date Time	Process Type	Process	Scheduled Process	Run Frequency	Owned By Worker	Restricted to Environment	Recurrence Sta
01/24/2019 02:00:00.000 PM	Report	Workforce Report	Workforce Report				/2018
02/15/2019 10:30:00.000 AM	Report	Insurance/Driver's License Tracking Report	Insurance/Driver's License Report				5/2018