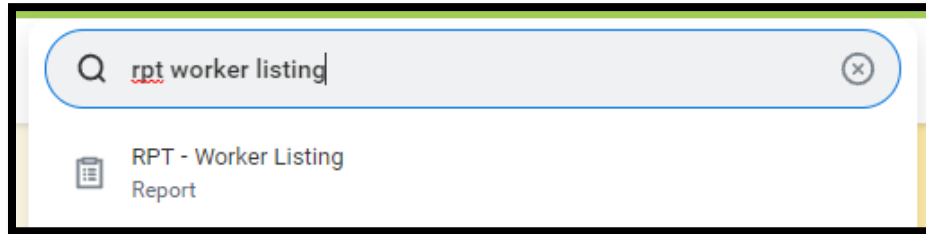


Getting Started: Scheduling Reports

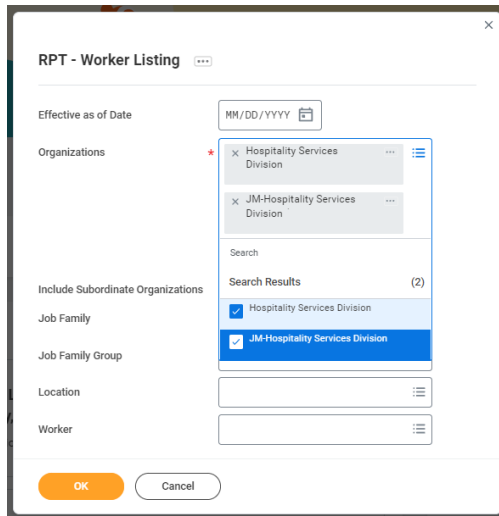
SCHEDULING A REPORT

Managers can run reports within Workday to track and evaluate data. A report can also be scheduled to run in the future.

1. Search for a report from the search bar. This example is using an **Active Employees Report**.

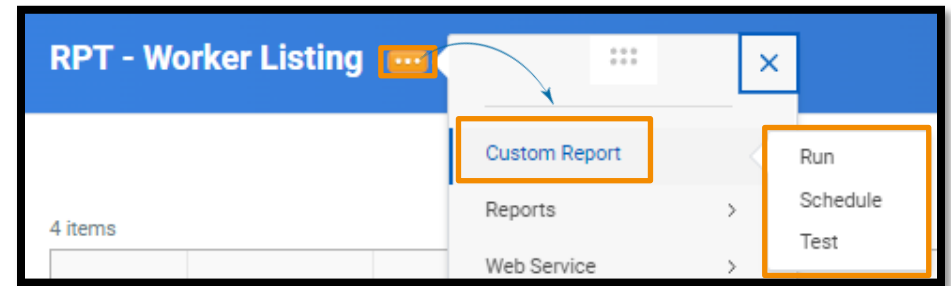


2. Fill in the correct information depending on how or where you want the data to pull from. This example chooses to see all the active employees under the manager, Barbara Jones.

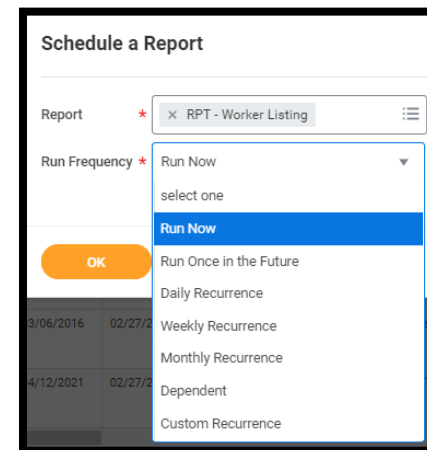


3. Click **OK**.

4. The report and details can be seen. Under the Actions button is an option to schedule running the report.




5. The report frequency can be adjusted.



6. Like the step before, you'll need to specify the **Report Criteria** for your scheduled report. In this example, Barbara has chosen the **Direct Supervisor** criteria to ensure she gets the correct information.

Getting Started: Scheduling Reports

Schedule a Report 








Request Name *

Report Name RPT - Worker Listing

Run Frequency Weekly Recurrence

Report Criteria **Schedule** Output

7 items

Field	Value Type	Value
 Effective as of Date	<input type="text" value="Specify Value"/>	<input type="text"/>
 Organizations	<input type="text" value="Specify Value"/>	<ul style="list-style-type: none"><input checked="" type="checkbox"/> JM-Hospitality Services Division (Eric Nowak (22162))<input checked="" type="checkbox"/> Hospitality Services Division (Eric Nowak (22162))
 Include Subordinate Organizations	<input type="text" value="Specify Value"/>	<input type="checkbox"/>
 Job Family	<input type="text" value="Specify Value"/>	<input type="text"/>
 Job Family Group	<input type="text" value="Specify Value"/>	<input type="text"/>
 Location	<input type="text" value="Specify Value"/>	<input type="text"/>
 Worker	<input type="text" value="Specify Value"/>	<input type="text"/>

- Note:** Be sure to review the other two tabs, **Schedule** and **Output**, to be sure the information is correct.

Getting Started: Scheduling Reports

- 8. Add the correct information under the Schedule tab. The red asterisks are required fields. Be sure your Start Date is sometime in the future or you will receive an error message.

The screenshot shows the 'Schedule' tab of a report configuration interface. At the top, there are three tabs: 'Report Criteria', 'Schedule', and 'Output'. The 'Schedule' tab is active. Below the tabs, there is a 'Priority' dropdown menu set to 'Normal'. The main section is titled 'Daily Recurrence Criteria'. It includes a 'Recurrence Type' section with two radio buttons: 'Recurs Every Weekday' (selected) and 'Recurs Every x Day(s)' (with a value of 0). Below this are four dropdown menus: 'Start Time' (8:00 AM), 'Time Zone' (GMT-05:00 Eastern Time (New York)), and 'Catch Up Behavior' (Run Once). The bottom section is titled 'Range of Recurrence' and contains two date pickers: 'Start Date' (09/18/2020) and 'End Date' (12/31/2020). Red asterisks indicate required fields.

- 9. The Output tab will give options on what file type to use for exporting. When the report runs, you'll receive a notification in Workday. In this example, you would have 5 days to download that report until it's deleted.

The screenshot shows the 'Output' tab of a report configuration interface. At the top, there are three tabs: 'Report Criteria', 'Schedule', and 'Output'. The 'Output' tab is active. Below the tabs, there is an 'Output Type' section with three radio buttons: 'Excel' (selected), 'Report (PDF)', and 'Text (CSV)'. Below this is a 'Report Tags' text input field. The next section is 'File to be Deleted After (Days)' with a value of 5. At the bottom, there are two checkboxes: 'Do Not Output an Empty Report' and 'Hide Prompt Values', both of which are unchecked. Red asterisks indicate required fields.