Quick Reference Guide: Scheduling Reports

Keep in mind

The run frequencies for Workday reports can be configured as follows:

- **Run Now**: the report runs immediately when you click **OK**. No schedule details are necessary.

- **Run Once in the Future**: the report runs at the date and time that you specify.

- **Daily Recurrence**: the report runs every specified day at the specified time. The schedule will operate from the specified start date to end date.

- **Weekly Recurrence**: the report runs every specified week at the specified time. The schedule will operate from the specified start date to end date.

- **Monthly Recurrence**: the report runs in the specified months (or every month) on the specified day of the month or week at a specified time. The schedule will operate from the specified start date to end date.

Information Needed

- A list of custom reports can be found on the Workday Website. All custom reports start with the letters ‘RPT’.

- Workday delivered reports can be found [here](#).

1. From the Search box, search for the task **Schedule a Report**.

2. Select the **Schedule a Report** task.

Search Results 2 items

Tasks and Reports

Scheduled Future Reports Exception Audit
View all reports scheduled to run in the future that have an exception. Details include who scheduled it and who it will run as, if anyone, when it will run next, and the validation errors. Enables you to ensure that al...
3. Use the **Prompt Icon** to select the **Report** you would like to run. Use the search bar at the top of the prompt window to search instead of selecting from a list.

4. Use the **Drop Down Icon** to select the **Run Frequency**.

5. Click the **OK Button** to continue.

6. Use the **Prompts** to enter in the **Report Criteria** value(s) needed for different required fields.

Common **Report Criteria** include which supervisory organization for which the report should return information once scheduled and whether the report should return data from subordinate supervisory organizations.
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7. Click the **OK** Button to continue.

8. When the report is ready, a notification will appear in the upper right hand corner of the Workday screen.

   ![Expiration Dates for Worker IDs](image)

   *Expiration Dates for Worker IDs is now available in My Reports - Just now*

   ![Expiration Dates for Worker IDs](image)

   If you have the *Scheduled Report Completion* notification type enabled to be sent to you immediately, an email notification will be sent to your UChicago email address each time the report runs.

   **Note:** Notification preferences can be set by clicking on the picture icon next to your name at the top of the screen and selecting “Change Preferences”.