

Quick Reference Guide: *Scheduling Reports***Keep in mind**

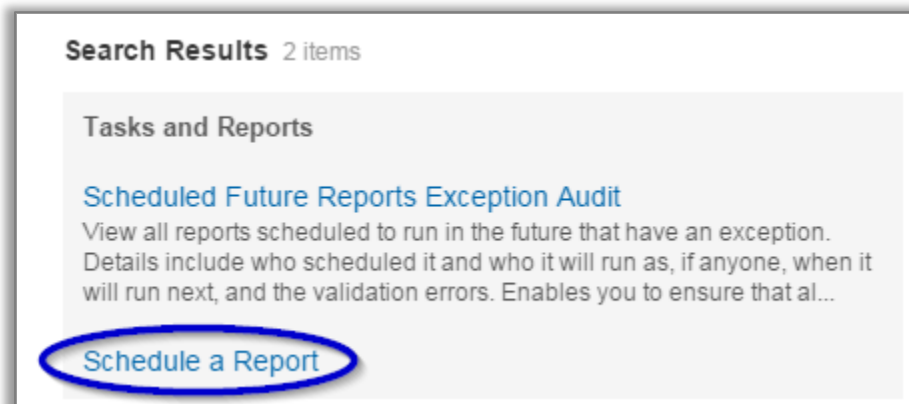
The run frequencies for Workday reports can be configured as follows:

- 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**

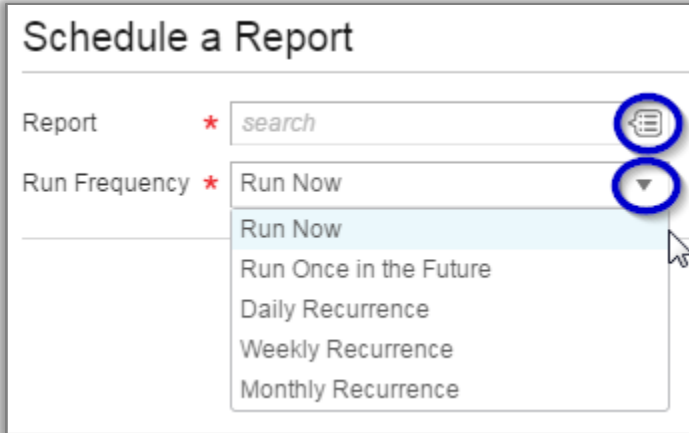
- A list of custom reports can be found on the Workday Website. All custom reports start with the letters 'RPT'.
- Workday delivered reports can be found [here](#).

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





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




**Schedule a Report**







Report \*  

Run Frequency \*  

- Run Now
- Run Once in the Future
- Daily Recurrence
- Weekly Recurrence
- Monthly Recurrence

- Click the **OK Button**  to continue.
- Use the **Prompts** to enter in the **Report Criteria** value(s) needed for different required fields.


4 items

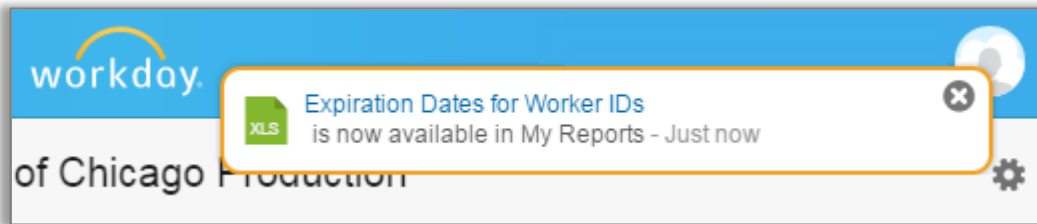
Field	Value Type	Value
 Organizations	Specify Value 	<input type="text" value="search"/> 
 Include Subordinate Organizations	Specify Value	<input type="checkbox"/>
 Global Identifier Usage Types	Specify Value	<input type="text"/>
 Date	Specify Value	<input type="text"/>




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.



 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".*