How to Schedule Reports in Workday

To schedule a Workday report, follow the steps below:

1. In the Workday Search bar, enter *Schedule a* Report.
2. Click Enter.
3. Under Search Results, click Schedule a Report.
4. In the Report field, enter the name of the report you want to schedule.
5. In the Run Frequency field, select how often you want the report to run.
6. Click OK.
7. Click each of the following tabs and enter the appropriate information:

   a. Report Criteria – This allows you to specify the prompts to use when the scheduled report runs.

   b. Schedule – Use this to specify the frequency, time, and duration of the scheduled runs.

   c. Output – This allows you to specify the format of the delivered report (Excel, PDF, or CSV). You can also add a report tag to the report from this tab.

   d. Share – You may choose to share the report output with other users. *Note: The recipient receives the data that the scheduler is authorized to see. The scheduler must always follow the university's data access policies when sharing scheduled* reports*.*

All scheduled reports must have an end date, which means you will have to periodically renew the scheduled report.

Scheduled reports are delivered to a user's My Reports, which is in the drop down list of your profile picture in the upper right corner of the screen. To send a scheduled report to a Workday user's My Reports, the user must have a user-based role or be in an unconstrained role-based security group.