



Syssero[®] Solution Packet

Schedule Auto-Delete of Temporary Reports

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Solution Overview

If you find yourself navigating through a sea of reports, you might wonder when it's appropriate to delete or clean up those temporary files cluttering your space. Whether it's to protect sensitive information, free up valuable storage, ensure data remains up-to-date, or simply to streamline your workspace for better efficiency, there are several good reasons to consider a cleanup. From maintaining data security and compliance to optimizing the system's performance and enhancing your overall user experience, understanding when and why to manage temporary reports can significantly impact your daily operations in Workday.

Impacted Functional Areas

- Core HCM
- Reporting

Step 1: Find temporary reports

To start, you'll simply run the report called "All Custom Reports" and select the checkbox for **Is Temporary**.

The screenshot shows a dialog box titled "All Custom Reports" with a close button (X) in the top right corner. The dialog contains several input fields and date/time pickers:

- Custom Report: [Text Input]
- Report Owner: [Text Input]
- Data Source: [Text Input]
- Report Tags: [Text Input]
- Report Type: [Text Input]
- Last Update Date On or After: [MM/DD/YYYY] [Time Picker]
- Last Update Date On or Before: [MM/DD/YYYY] [Time Picker]
- Created On or After: [MM/DD/YYYY] [Time Picker]
- Created On or Before: [MM/DD/YYYY] [Time Picker]
- Past Deletion Date:
- Is Temporary: (highlighted with a red box and arrow)

At the bottom of the dialog are two buttons: "OK" (orange) and "Cancel" (white).




Once you've done this, you'll see all custom reports where you can verify their temporary status.

Custom Report	Report Type	Data Source	Category	Report Tags	Report Owner
aaas	Simple	All Active and Terminated Workers	Worker Data		Imoneil / Logan McNeil
abc_3	Advanced	All Workers	Worker Data		Imoneil / Logan McNeil
Acc_Active-employee details	Simple	Time Off - All Statuses for Active and Terminated Employees (Indexed)	Time Off and Leave		Imoneil / Logan McNeil

Last Updated	Last Run Date	Last Run By	Number of Times Executed in Last 6 Months	Worklet	Output Type	Chart Type	Is Temporary	Landing Page
01/25/2024 03:37:38.182 AM			0	No	Table		Yes	
01/30/2024 02:54:23.607 AM	01/30/2024 03:42:00.890 AM	Imoneil / Logan McNeil	1	No	Table		Yes	
01/27/2024 03:38:22.913 AM	01/28/2024 09:44:52.381 AM	Imoneil / Logan McNeil	2	No	Table		Yes	

Step 2: Schedule report cleanup

Once you've confirmed the need to cleanup temporary reports, search for the Delete Temporary Report Definitions task and click either All Temporary or My Temporary, depending on your desired outcome. Once you pick, this will allow the Run Frequency to be selected. It can be manually run "Now" or scheduled at a given frequency in the future.

 Delete Temporary Report Definitions

Tasks and Reports

[Delete All Temporary Report Definitions](#)

Task

[Delete My Temporary Report Definitions](#)

Task



Here, we'll select Monthly, and fill-in all the required fields to save the scheduled deletion.

The screenshot shows a 'Monthly Recurrence' dialog box with the following fields and annotations:

- Run Frequency**: Monthly Recurrence
- Schedule**: Priority: Normal
- Monthly Recurrence Criteria**:
 - Monthly Frequency**: Every Month (Annotated: Monthly Frequency)
 - Month(s)
- Recurrence Type**:
 - Day(s) of the Month (Annotated: Any day(s) within the month can be selected. Running 1x per month only one day is selected. The day can be changed if needed.)
 - Day of the Week
- Start Time**: 9:00 PM
- Time Zone**: GMT-05:00 Eastern Time (New York) (Annotated: This information determines the time of day the job runs.)
- Catch Up Behavior**: Run Once
- Range of Recurrence**:
 - Start Date**: (Annotated: This is the date range that the scheduled job will run. It will need to be updated as the end date approaches to extend the schedule.)
 - End Date**: (Annotated: This is the date range that the scheduled job will run. It will need to be updated as the end date approaches to extend the schedule.)

Buttons: OK, Cancel

Next, you'll want to confirm the schedule is in place, by running the report "Scheduled Future Processes" and select **Job** for process type

The screenshot shows the 'Scheduled Future Processes' dialog box with the following fields:

- Recurrence Start Date: MM/DD/YYYY
- Recurrence End Date: MM/DD/YYYY
- Process: (Empty)
- Process Type: Job
- Run Frequency: (Empty)
- Include Expired Run Once:

Buttons: OK, Cancel



Process Type JOD Include Expired Run Once No

9 items



Next Scheduled Date Time	Process Type	Process	Scheduled Process	Run Frequency	Owned by User	Restricted to Environment
PM						
02/01/2024 02:15:00.000 AM	Job	Alert Job	Birthday Notifications	Daily Recurrence	Logan McNeil	QA
02/01/2024 03:05:00.000 AM	Job	Delete Expired Temporary Reports Job	Delete Temporary Report Definitions on 2024-01-31	Monthly Recurrence	Logan McNeil	QA
02/02/2024 09:00:00.000 AM	Job	Run Publish Analytic Data Source	Vasu	Weekly Recurrence	Logan McNeil	QA

Once there, you can confirm that your process is scheduled.

Note: Expired temporary reports remain in your tenant until you run the Delete Temporary Report Definitions task. You can also schedule the task to run on a regular basis. When Delete Temporary Report Definitions executes, Workday permanently deletes any temporary reports that expire on or before the current date. As new reports are built and marked as temporary, they will be deleted each time this job runs.

If any existing report needs to be marked as temporary, edit the report and under the Advanced tab, check the box for Temporary Report. The Date Report Definition will be Deleted box will auto-fill to 7 days in the future. This will **not** delete the report. It will only be deleted when the scheduled job runs.

Run Frequency Monthly Recurrence

Matrix Drill Down Filter Prompts Output Share **Advanced**

Specify advanced options for the report (empty)

Report Performance

Optimized for Performance

View Options

Enable Save Parameters

Exclude Execution Link from Search

Worksheets

Enable for Worksheets

Temporary Report

Date Report Definition will be Deleted *



Optional Step: View non-temporary reports

As a final step, if you'd like to view all custom reports **not** marked as Temporary, run the report **All Custom Reports** and click Ok. This will show all custom reports not marked as temporary, the last time a report was run, when it was created, who last ran the report, and more. This will help determine which reports may need to be marked temporary for deletion.

And that's it! You've now scheduled all temporary reports to be deleted on a monthly basis.

For help or more info, reach out to info@syssero.com