Follow the steps below to set up a scheduled recurring Works report such as Cardholder Statement (same steps can be used to schedule other Works reports).

1. From the Works Home Screen select Reports and Create:

2. Select Spend in the Category type and the drop down arrow next to Choose from all available templates

3. Select +Cardholder Statement 2014

4. Report Options Screen appears:
   - Select Advanced

5. Scroll down to the Filter section of the page:
   - Select the All Cards in scope filter icon and select the cardholder.

Post Date is set to run previous cycle. (Adjust this only if you’d like to run a report for a different bill cycle period)

6. Scroll down to Save Template
   - Check the Save Template to Template Library box
   - Provide a template name (i.e. JANE DOE CARDHOLDER STATEMENT)

7. Scroll down to Scheduling and Expiration to schedule your new report to run automatically each month on the 3rd.
   - Job Name should match “Template Name” above.
   - Under Schedule, select ‘Recurring’, then “Every month on the 3rd at 7am”.

8. Select Submit Report (lower right of screen) to complete scheduling.

You’ll be directed automatically to the Scheduled Reports screen upon completion. Next Run Date is provided: Your report will run on the next scheduled run date.

Scheduled reports can be run on demand by selecting the report name and then, Modify/Run from the drop down menu. The Create Report template will appear, select Submit Report to view/print.