



## COGNOS Schedule Management

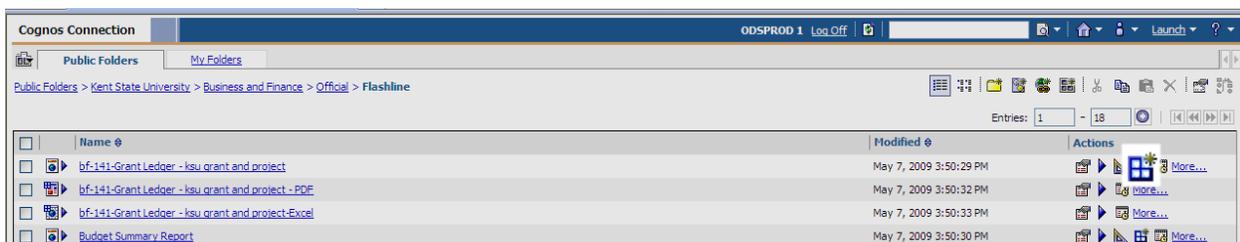
In Cognos, you can schedule a report to run later, or at a recurring date and time. This job aid will cover important details you should know before setting up schedules, saving a report as a Report View and setting up schedules.

### Best Practices

- If you are scheduling multiple reports to run on the same day, **do not** schedule the reports to run at the same time; schedule them in 10 minute intervals
- When setting your default prompt parameters, there are some reports where the prompt values need to be changed before your scheduled report runs (e.g. many financial reports require and Fiscal Period and Fiscal Year)
- If you are scheduling reports that contain sensitive data (e.g. birth date, GPA, Banner ID) **do not** email these reports
- Peak times (please avoid scheduling at these times):
  - 7:00 am – 8:00 am (preferably 7:00 am – 10:00 am)
  - Nightly refresh – 2:00 am – 7:00 am
  - Maintenance window – Tuesday, Thursday, Sunday – 5:00 am – 7:00 am
- Scheduling reports to run at peak times, or scheduling multiple reports to run at the same time can cause the reports to time out and can affect performance

### Saving Report as Report View

If the report you want to schedule is a public report (located in an Official or Internal folder) and you did not create it, your first step is to save a report view of the report and then establish your default values if the report contains a prompt page.



1. After locating your report, select the **Create a Report View**  icon from the **Actions** section

## COGNOS - Schedule Management

Specify a name and description - New Report View wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

**Name:**

**Description:**

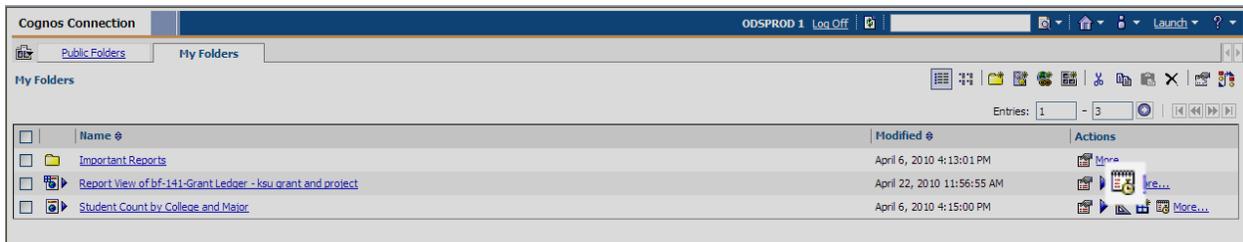
**Screen tip:**

**Location:**  
My Folders  
[Select another location...](#) [Select My Folders](#)



2. The **New Report View wizard** will open
3. Click **Select My Folders**
4. Click **Finish**

### Setting Default Prompt Values



1. Open **My Folders**
2. After locating your report view, select the **Schedule**  icon from the **Actions** section

## COGNOS - Schedule Management

Schedule - Report View of bf-141-Grant Ledger - ksu grant and project

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without losing any of its details.

Disable the schedule **Priority:** 3

**Frequency:**  
Select the frequency by clicking on a link.  
[By Day](#) | **[By Week](#)** | [By Month](#) | [By Year](#) | [By Trigger](#)

Every  week(s) on:  
 Monday  Tuesday  Wednesday  Thursday  
 Friday  Saturday  Sunday

**Options**  
 Override the default values  
**Formats:** Default  
**Languages:** Default  
**Delivery:** Save the report

**Prompt values**  
 Override the default values  
No values saved  
[Set...](#)

Start: Apr 22, 2010 12 : 03 PM  
End:  No end date  
 End by: Apr 22, 2010 12 : 03 PM

OK Cancel

3. Select the **Override the default values** checkbox in the **Prompt values** section
4. Select the **Set...** link

**Grant Ledger Report**

Please fill in the selections below. Those marked with a red asterisk are required.

Fund: \* 123456789  
Organization: \* 123456789  
Program: \* 987654321  
Grant ID: \* 987654321  
Fiscal Year: \* 2010  
Fiscal Period: \* 06

Cancel < Back Next > Finish

5. Enter your default values
6. Click **Finish**

## Establishing a Schedule - Saving in Cognos

This section provides you with information on how to establish a schedule and save your report within Cognos.



1. Under the actions section, click the **Schedule**  icon for the entry you want to schedule
2. The **Schedule** window will open

## COGNOS - Schedule Management

Schedule - Student Count by College August 2009

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without losing any of its details.

Disable the schedule **4**      Priority: 3

**1** **Frequency:** Select the frequency by clicking on a link.  
By Day    **By Week**    By Month    By Year    By Trigger

Every  week(s) on:  
 Monday     Tuesday     Wednesday     Thursday  
 Friday     Saturday     Sunday

**2** **Start:** Apr 22, 2010  
10 : 17 AM

**3** **End:**  
 No end date  
 End by: Apr 22, 2010  
10 : 17 AM

**Options**

Override the default values  
Formats: Default  
Languages: Default  
Delivery: Save the report

**Prompt values**

Override the default values  
No values saved

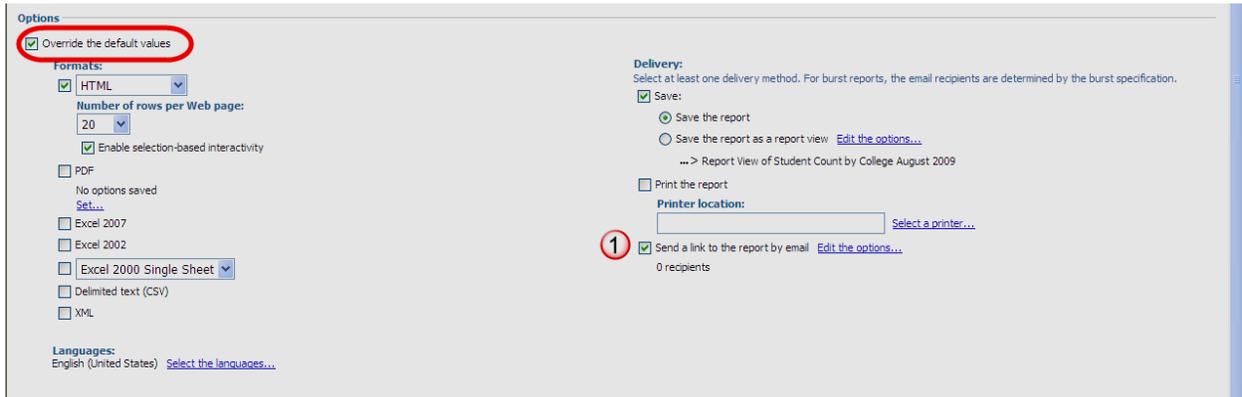
OK    Cancel

**5**

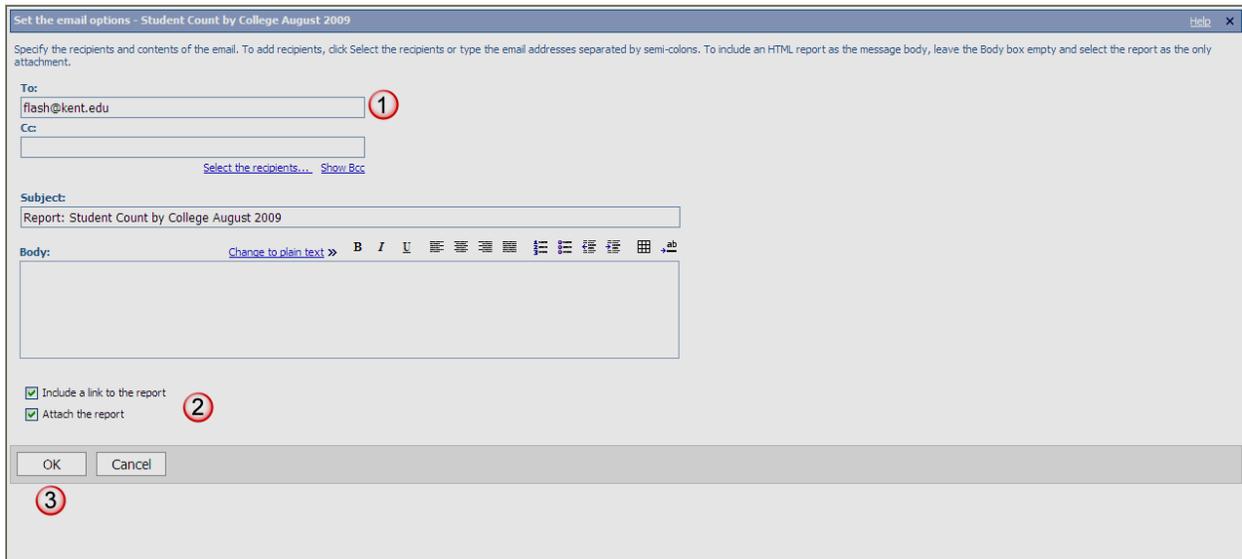
1. Under **Frequency**, select how often you want the report to run
2. Under **Start**, select the date and time when you want the schedule to start. **NOTE: If you will be scheduling multiple reports, do not select the same start time**
3. Under **End**, select when you want the schedule to end
4. If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box - to re-enable the schedule, clear the check box
5. Click **OK**

**Establishing a Schedule - E-mailing**

You also have the option to have the report E-mailed to you on a regular schedule. Remember! If a report contains any sensitive data, it should not be E-mailed. Begin by following the steps from the previous section, but select the **Override the default values** checkbox.



1. Select the **Send a link to the report by E-mail** checkbox, then select the **Edit the options...** link



1. Enter the E-mail address of the recipient; if there are multiple recipients, separate each E-mail address with a semicolon
2. Select either the **Include a link to the report** or **Attach the report** checkboxes
3. Click **OK**