



COGNOS Schedule Management

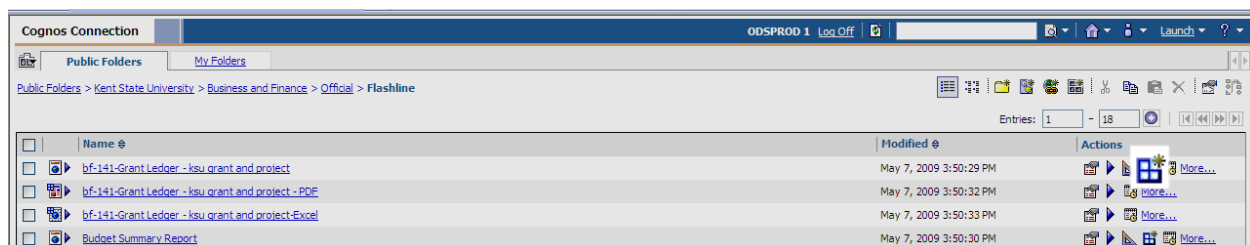
In Cognos, you can schedule a report to run later, or at a recurring date and time. This job aid will cover important details you should know before setting up schedules, saving a report as a Report View and setting up schedules.

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:

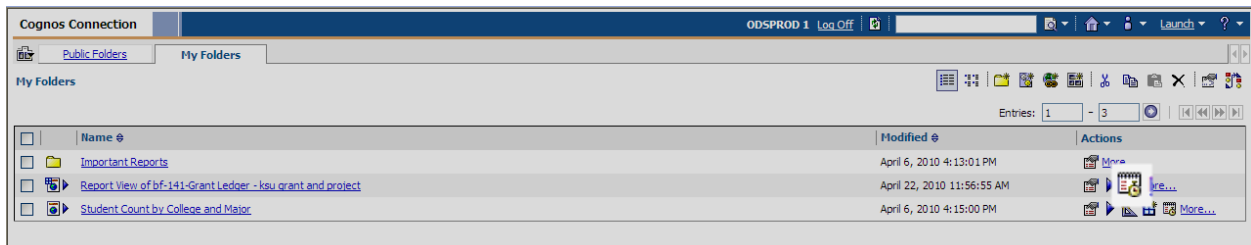
Screen tip:

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

Start: Apr 22, 2010 12 : 03 PM

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

Frequency: Select the frequency by clicking on a link.

[By Day](#) **[By Week](#)** [By Month](#) [By Year](#) [By Trigger](#)

Every 1 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...](#)

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

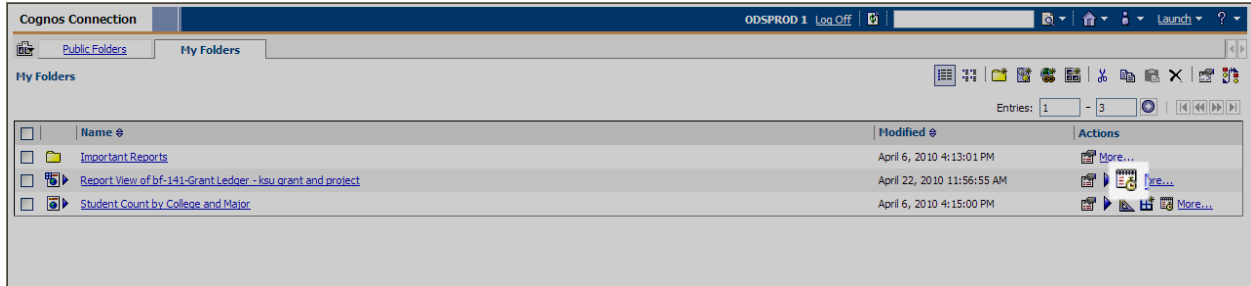
Fiscal Period: * 06


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

Frequency: 1
Select the frequency by clicking on a link.
[By Day](#) **[By Week](#)** [By Month](#) [By Year](#) [By Trigger](#)

Every 1 week(s) on:
☐ Monday ☐ Tuesday ☐ Wednesday ☒ Thursday
☐ Friday ☐ Saturday ☐ Sunday

Start: 2
Apr 22, 2010
10 : 17 AM

End: 3
☒ 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.

Options

☒ Override the default values

Formats:

☒ HTML

Number of rows per Web page:
20

☒ Enable selection-based interactivity

☐ PDF
No options saved
[Set...](#)

☐ Excel 2007

☐ Excel 2002

☐ Excel 2000 Single Sheet

☐ Delimited text (CSV)

☐ XML

Languages:
English (United States) [Select the languages...](#)

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

☒ Save:
☒ Save the report
☐ Save the report as a report view [Edit the options...](#)
 ... > Report View of Student Count by College August 2009

☐ Print the report
Printer location: [Select a printer...](#)

☒ Send a link to the report by email [Edit the options...](#)
 0 recipients

1

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

Set the email options - Student Count by College August 2009

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:
flash@kent.edu **1**

Cc:

[Select the recipients...](#) [Show Box](#)

Subject:
Report: Student Count by College August 2009

Body: [Change to plain text >>](#) **B I U**

☒ Include a link to the report **2**

☒ Attach the report

3 **OK** **Cancel**

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**