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

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
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**