# Scheduling Cognos Reports

Updated 7/20/10

If you want to schedule a report to run daily, weekly, etc. you can do that through the option of Scheduling. If you are a report author and want to schedule a report that you wrote, you would do it through the Scheduling icon. If you are running a report that someone else wrote, you would need to create a report view to a folder where you have write access before you can schedule it through the Scheduling icon. Consumers would have to <u>create a report view</u> to "My Folders."
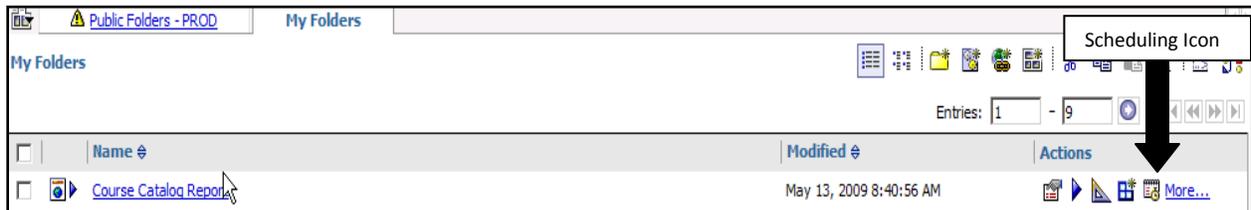
1. Select the Scheduling Icon
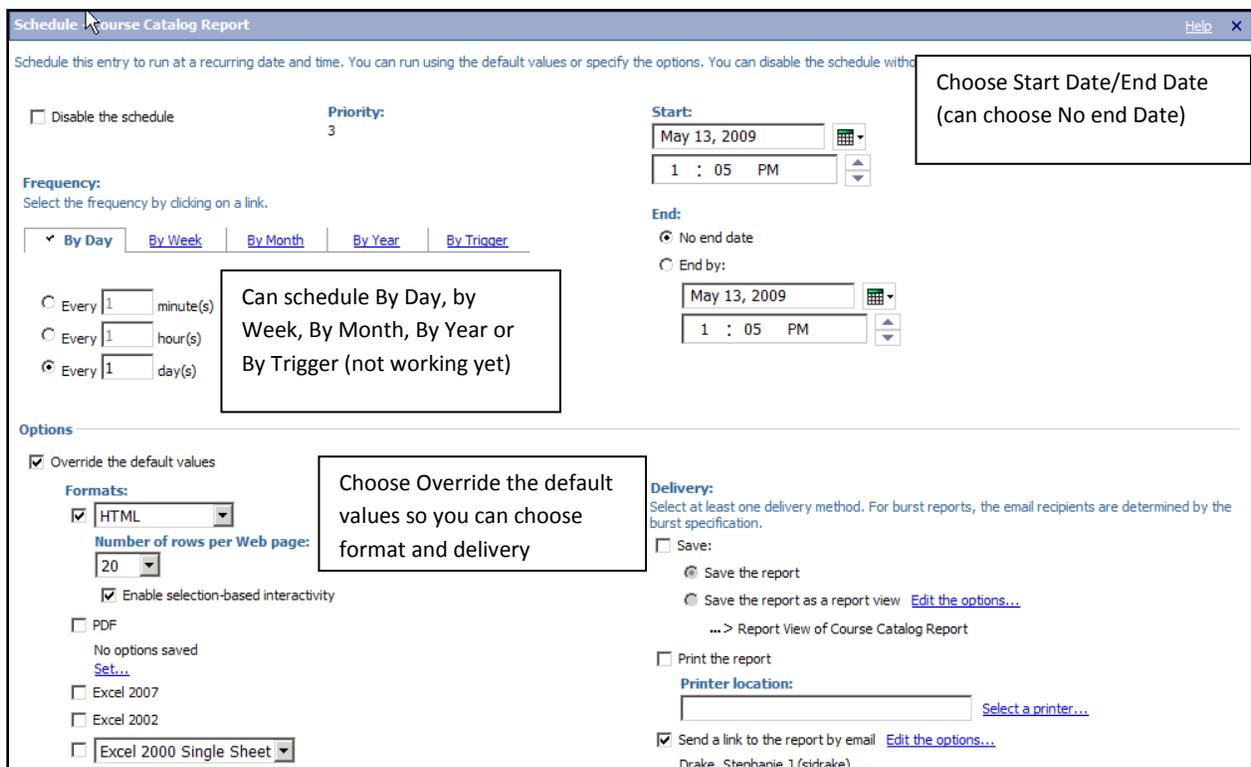
2. Choose Frequency
- By Day
- By Week
- By Month
- By Year

- By Trigger

3. Choose a Start Date and End Date (can choose "No End Date")
4. Choose Override the default values so you can choose format and delivery options
5. If you choose send report by email for delivery option, choose "Edit the Options"

Set the email options - Course Catalog Report   Help X

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:
Drake, Stephanie J (sjdrake);

Cc:

Select the recipients...   Show Bcc

> Enter email addresses in *To:* or *CC:* fields. Should default to user's email.

Subject:
Report: Course Catalog Report

Body: Change to plain text »   **B** *I* U

> Uncheck "Include a link to the report" checkbox and check "Attach the report" checkbox so that the report is an attachment to the email.

☐ Include a link to the report
☑ Attach the report

[OK]   [Cancel]

6. If you want to have the report run with specific prompts, check "Override the default values" checkbox under Prompt values.
7. Click the "Set.." link
8. Prompts for the report will load - select the prompt values

Prompt values
☑ Override the default values
   No values saved
   Set...

[OK]   [Cancel]

Credentials

In order to schedule Cognos reports, you will need to create your credentials. If you change your password and have scheduled reports to run, you will need to renew your credentials in order for the reports to continue to run as scheduled.
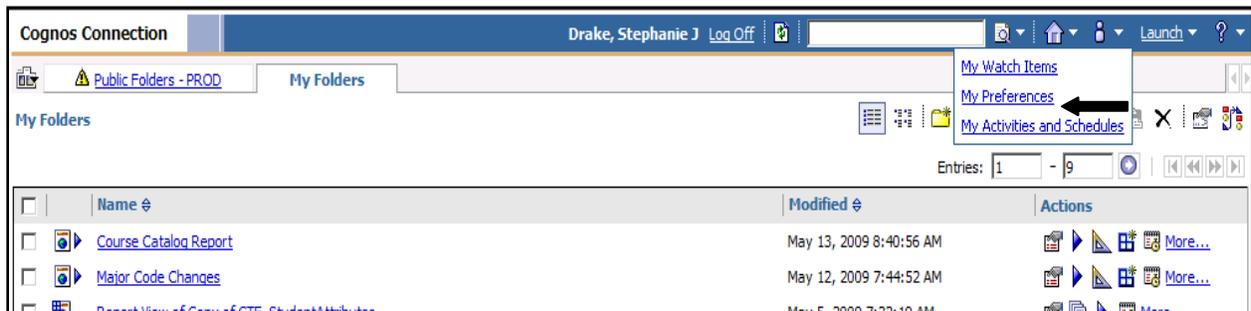
1. Go to My Preferences under "Person Icon"
2. Go to Personal Tab
3. Click on the "First you must create the credentials" link – for first time set up **ONLY**
4. Click on the "Renew the credentials" link whenever you change password

Click on "First, you must create the credentials" link to set up for the first time.
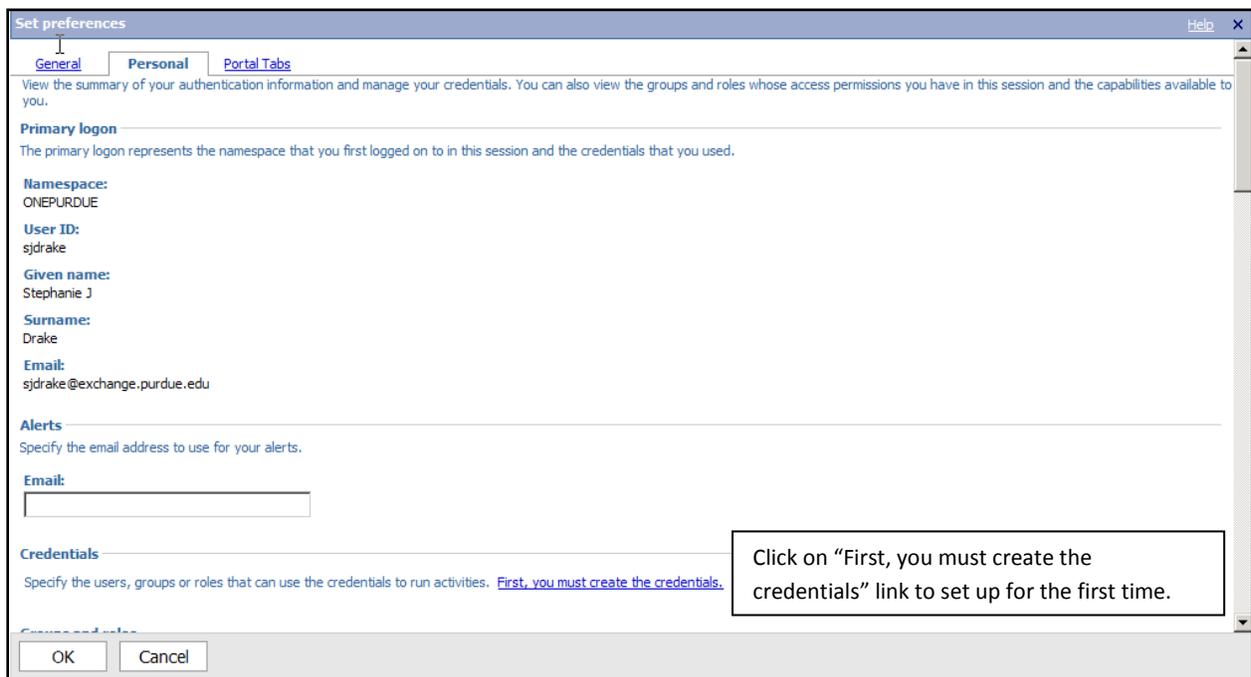
Once you have created credentials, you should be able to schedule Cognos reports to run using the Scheduling Icon.

When you change your career account password, you will need to renew your credentials if you have scheduled any Cognos reports to run. They will fail until you click on the "Renew the credentials" link after a password change.

Credentials

Specify the users, groups or roles that can use the credentials to run activities. You can also renew the credentials. Renew the credentials