

# Scheduling Cognos Reports

**COG 111**

**Cognos Version 11.1.7**

September 2022



## Business Intelligence Competency Center



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## Introduction

Cognos offers a report scheduling feature to run reports at recurring dates and times based on your business needs. The output can be saved to the Cognos servers and/or emailed to user's Purdue email accounts. Users have the option of disabling the schedule and re-enabling it without removing the report from the scheduled objects.

Along with this training, please be aware of the **Cognos Scheduler Policies and Procedures** and the **Cognos Scheduler Best Practices Guide**. Content for the documents is covered in this training and included at the end of this document. Quick Reference Cards (QRC's) for both documents can be found on the **Resources** page in Cognos under the **Cognos General Reporting Links** section.

### Scheduler Use Warnings for All Users

- Users must have a Cognos license to create Schedules & Subscriptions on the scheduler.
- Users must renew credentials in Cognos after changing their university password.
- User security may affect where scheduling can be used/saved.
- Users must maintain prompt values for schedule output to render the proper outcomes.
- Reports will fail if Cognos or its data sources are unavailable at the time a report is scheduled to run.

## Scheduled Report Location

There are different ways to schedule report output based on the user's business needs and the user's write access to folders. All users have write access to **My content**. Scheduling reports in **My Content** is more for personal report use and can only be changed or maintained by the user. (Scheduling reports in **My content** is covered starting on page 11).


Users may be given write access to their departmental folders. This allows scheduled reports to be saved and used by others in the department. Scheduled reports can then be maintained by anyone in the department with write access. This is very helpful with staff turnover as scheduled reports can be reassigned to a new or different user.

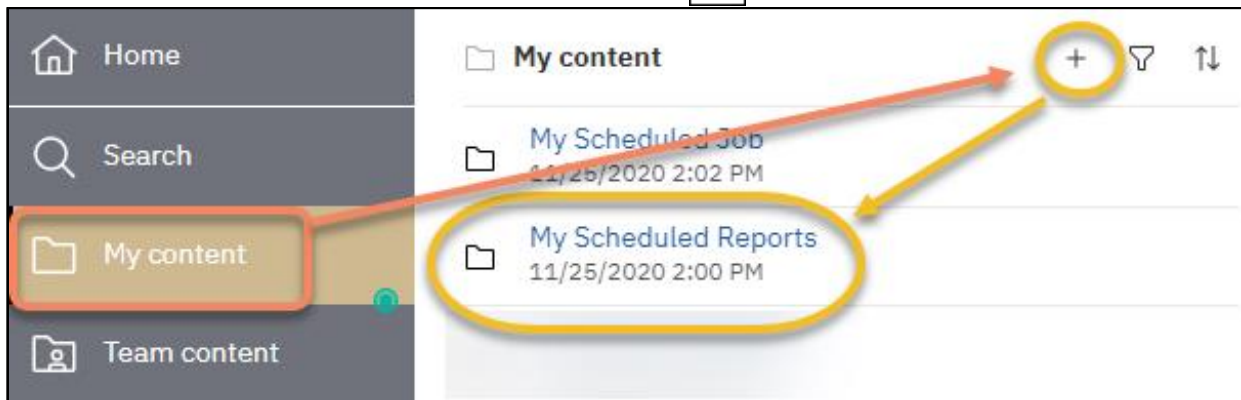
**This training manual assumes users have completed COG 101 Cognos Analytics Navigation**

## Create a New Folder and Report View

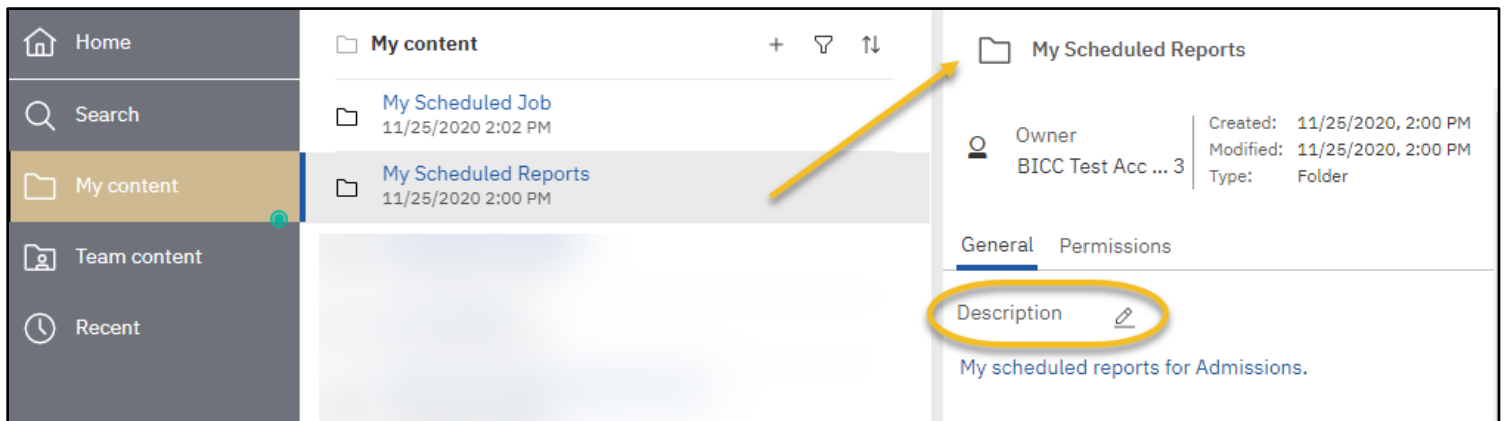


**NOTE:** Users will need to create a **Report View** of the report they wish to schedule. **DO NOT SCHEDULE THE ORIGINAL REPORT!**

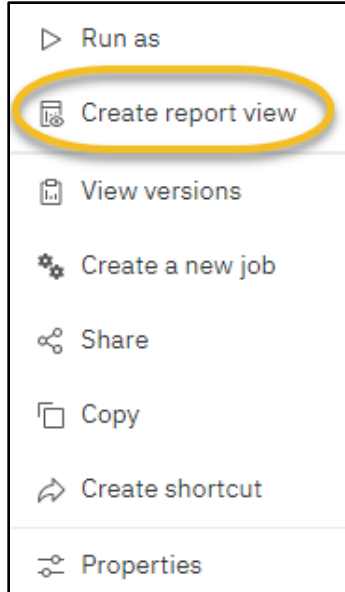
1. Log into <https://reportingqa.itap.purdue.edu>.
  - **NOTE:** We will be working in the above test environment for this training. Outside of this training, the general use URL (PROD) for Cognos is <https://reporting.itap.purdue.edu>
2. Click on the **My content** tab.
3. Create a new folder by clicking on the **New Folder**  icon in the **My content** panel.



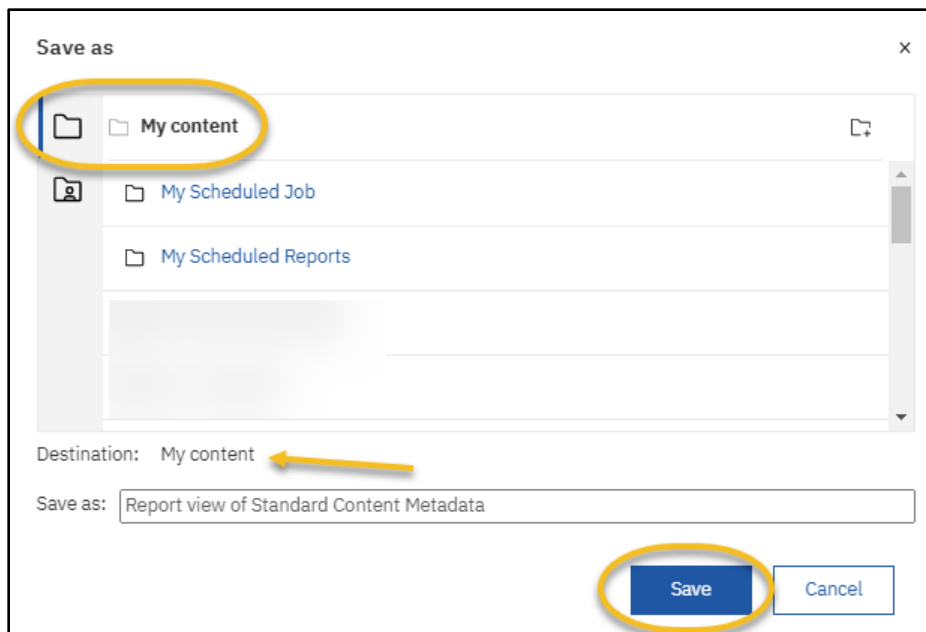
4. Name it **My Scheduled Reports**. Click Enter.
5. **Add** a description in the **Description** block if you prefer. Click on the **ellipsis** to the right of the folder name and choose **Properties**.
6. The **Properties** pane for the folder will open and on the **General** tab under **Description**, enter the description you want.



7. Click anywhere in the **Content Pane** to close the **Properties** pane.
8. Navigate to the **Customer Lifetime Value Analysis** report by clicking on **Team content > Samples > Reports > Standard Reports**. Click the ellipsis to the right of the **Customer lifetime value analysis** report to make a reporting view. Select **Create report view**.



9. Select **My content** and then **Save**.



10. **Navigate** to **My content** to view the new report view.



**NOTE:** You must click on the title of a folder to open it.

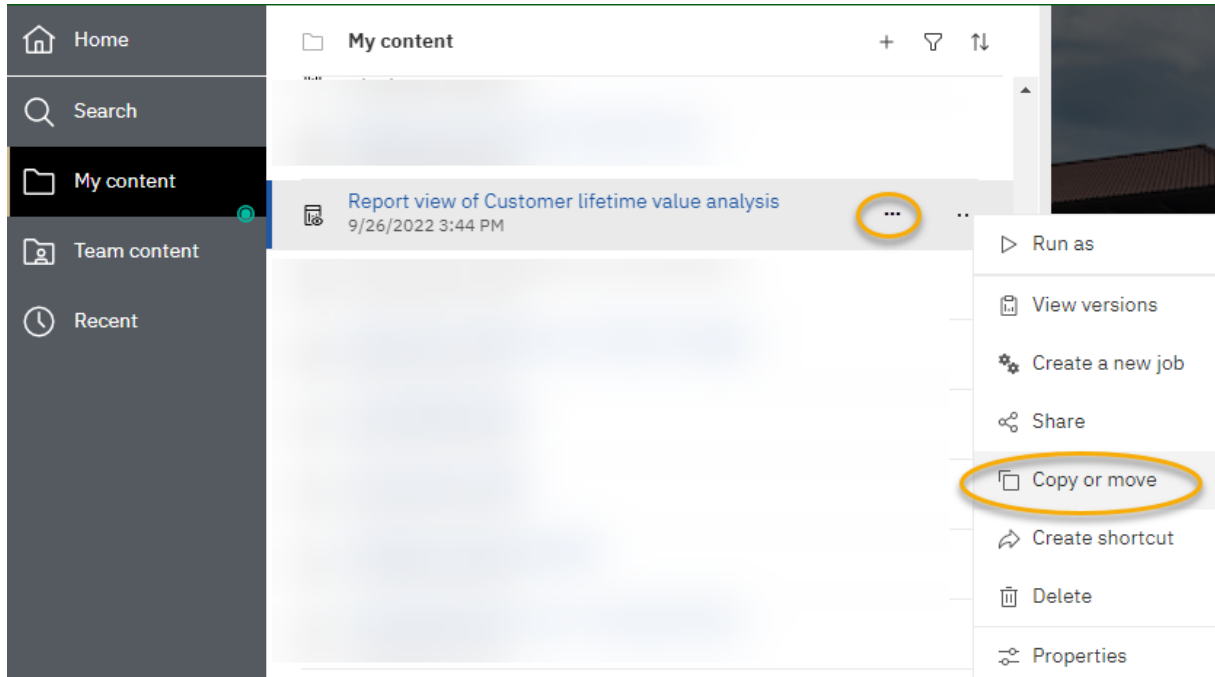


**NOTE:** Users will only be able to save the report in their **My content** folder or their departmental folder in **Team content**.

Notice the report name has been changed to **Report view Of Customer lifetime value analysis**. Cognos defaults the original name of the report and adds **Report view of** at the beginning. The report will alphabetize within the list. Notice the report icon has changed.

## Move a Report View to a Folder

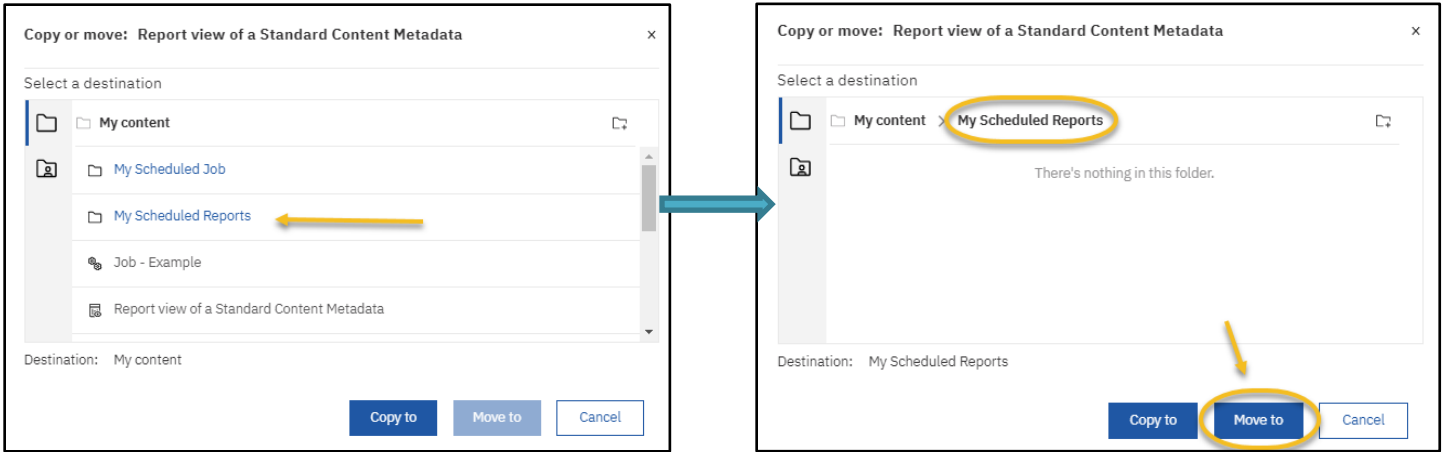
1. **Navigate** to the report view in the **My content** folder and **click** on the ellipsis to the right of the report. **Choose Copy or move**.



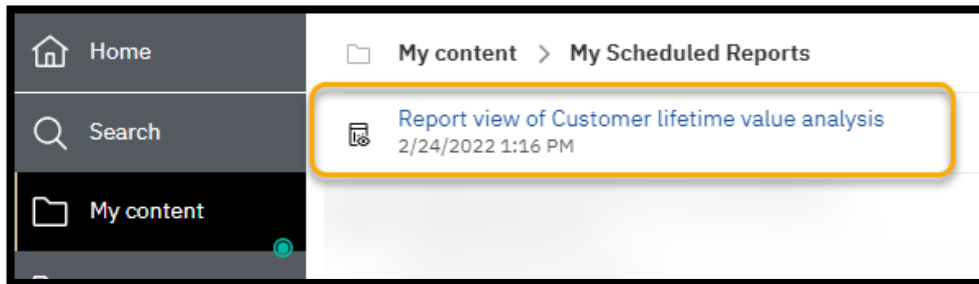
2. On the **Copy or move** pane, if not already positioned there, **navigate** to the **My content** folder by clicking on the **My content** title within the breadcrumb menu. This will position you at the root level of **My content**.



3. Click on the name of folder you created, **My Scheduled Reports**, to choose the destination. Click **Move to**.

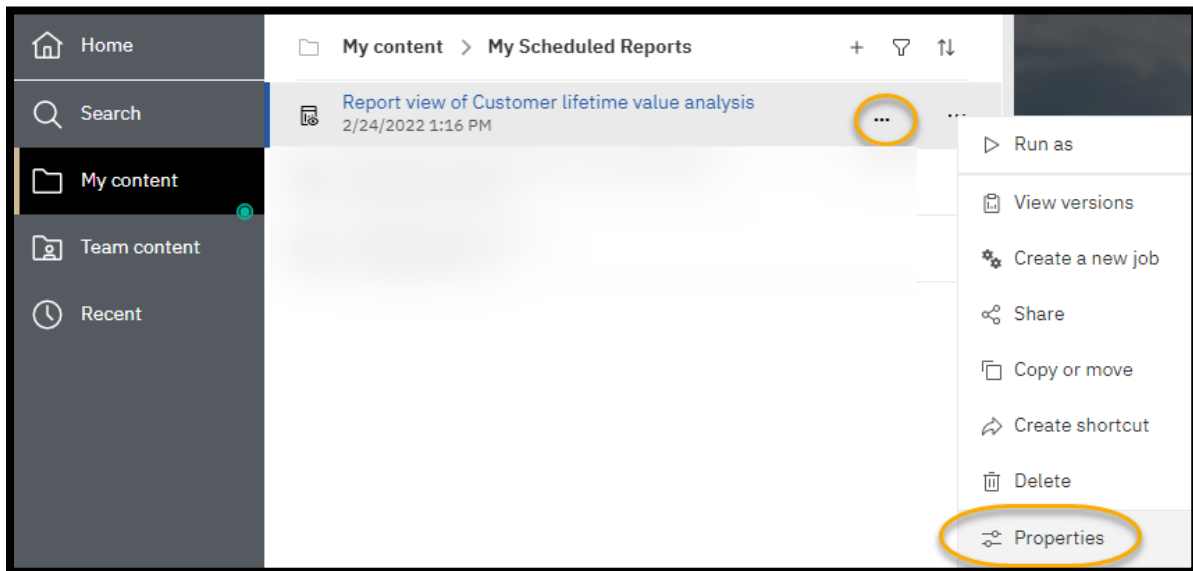


4. Open the **My Scheduled Reports** folder to see the report view by clicking on the folder name.

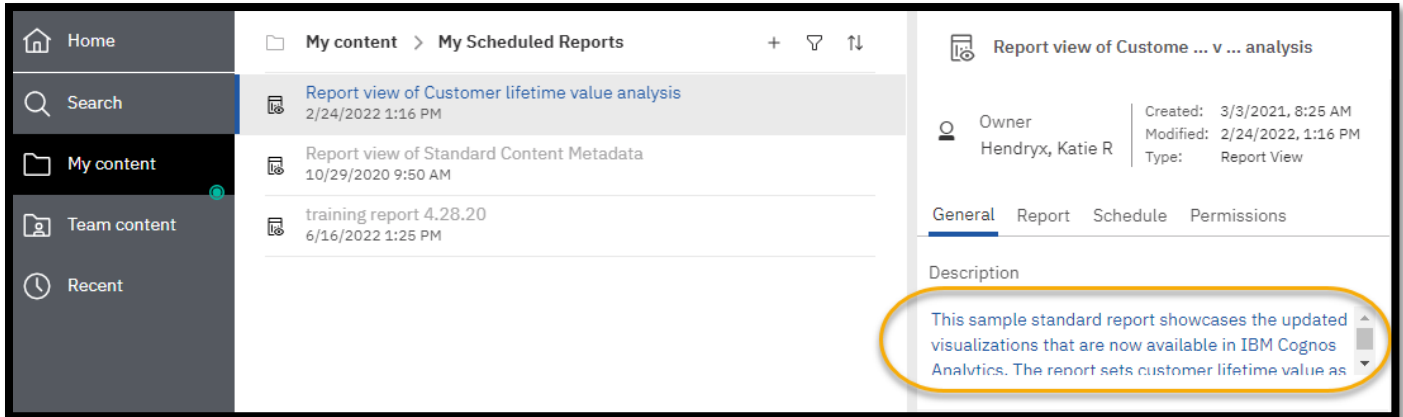


5. The report will be alphabetized within the list.

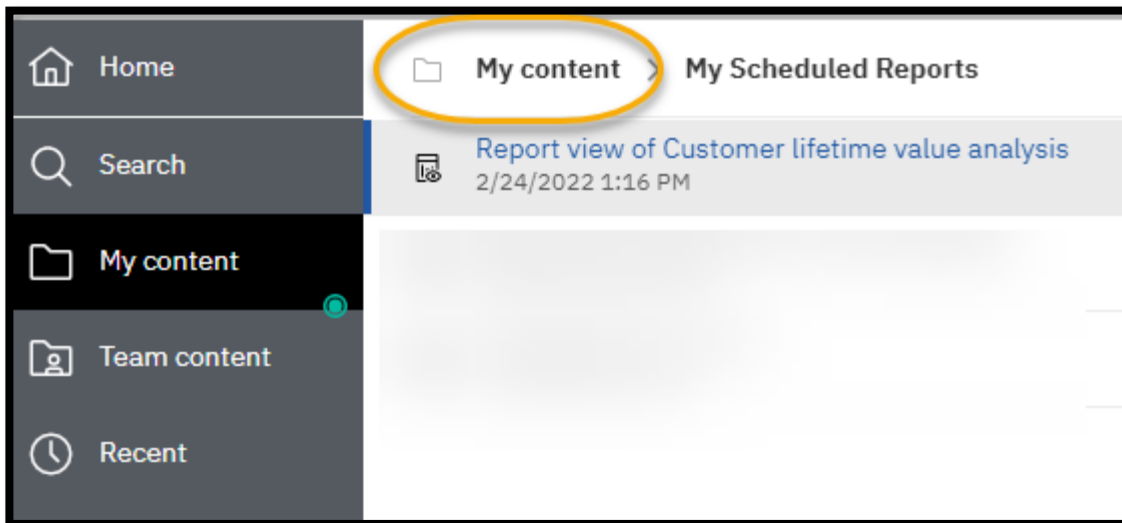
6. Add a **Description** to the report view if desired. To add a description, click the ellipsis to the right of the report name. Choose **Properties** from the pop-up menu.



7. Add the description you wish.

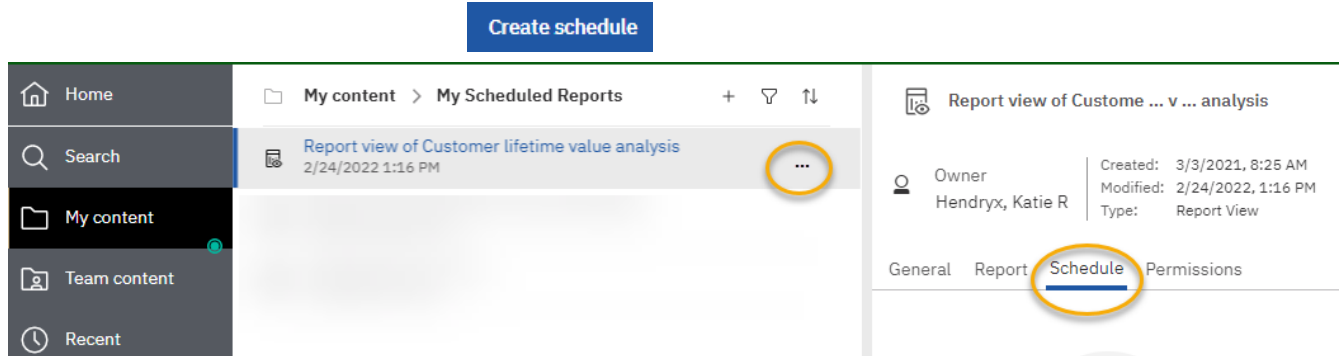


8. After entering the description, click anywhere in the **Content Panel** to close the **Properties pane**. Then, **navigate** to the **My Content** folder by clicking on the breadcrumb menu.



# Schedule Cognos Reports to Run Automatically

1. **Navigate** to open My **Scheduled Reports** folder.
2. Click on the **ellipsis** to the right of the report title and choose **Properties**, click on the **Schedule** tab and then click the **Create schedule** button.



The **Schedule** settings window will open over the **Properties** pane.

The screenshot shows the "Schedule" settings window. The "Schedule" tab is selected and highlighted with a blue underline. The "Options" and "Prompts" tabs are also visible. The "Frequency" section includes a "Type" dropdown menu set to "Weekly", a "Repeat every" field set to "1 week", and a "Repeat on" section with checkboxes for days of the week (M, T, W, T, F, S, S). The "W" checkbox is selected. A callout box points to the "Type" dropdown with the text: "Used to set schedule frequency 'By trigger' NOT available". Another callout box points to the "Repeat on" section with the text: "Used to set day(s) of the week, specific dates, or specific days and months." A red "STOP" sign is placed over the "Daily time interval" checkbox, with a callout box pointing to it that says "DO NOT USE". The "Period" section includes "Start" and "End" date and time pickers. A callout box points to the "Start" and "End" pickers with the text: "Used to set Start and End Dates".

**Schedule** Tab settings:

**A. Choose Frequency for the report to run** - Options change with each frequency option.

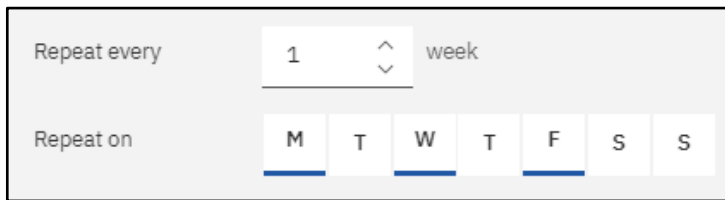
Daily	Days and Time
Weekly	Week, Day of the Week, and Time
Monthly	Day by Week, Date, Month and Time
Yearly	Day by Week, Date, Month and Time

**B. Choose a Start Date and time** - The selected time determines the time and date the report will start processing in Cognos. If reports are long running, consider setting the start time for early mornings or evenings (review *Cognos Scheduler Policies and Procedures* at the end of this training guide (page 35)).

**Choose an End Date** - If the report needs to remain on the scheduler, leave the **No end date** checked.

**C. Set the Day(s) the report is to run**

Choose the day(s) of the week the report should run by clicking on the day.



The screenshot shows the 'Repeat every' field set to '1' with a dropdown arrow and the unit 'week'. Below it, the 'Repeat on' field shows a row of seven boxes representing the days of the week: M, T, W, T, F, S, S. The boxes for M, W, and F are highlighted with a blue underline, indicating they are selected for the report to run.

The screenshot shows the 'Options' tab in the Cognos report scheduler. The 'Format' section includes checkboxes for HTML (checked), PDF, Excel, Excel Data, CSV, and XML. The 'Accessibility' section has a checkbox for 'Enable accessibility support'. The 'Delivery' section includes 'Save' (checked), 'Save report' (radio button selected), 'Save report as an external file', 'Send report by email', 'Send report to mobile device', and 'Print'. Callouts provide instructions: 'Format: Select the format you would like the report to be saved in. You can select multiple output types.'; 'Delivery: Save report is required! A copy is saved on the Cognos server with the Report View.'; 'Send Report: Choose this option if you want the report output to be delivered via email.'; and 'DO NOT USE' labels with red stop signs pointing to 'Send report to mobile device' and 'Print'.

**Options** Tab settings:

**D. Options**

1. **Formats:** Select the format you would like the report to be saved in. You can select multiple output types.
2. **Delivery: Save report** is **required**! A copy is saved on the Cognos server with the **Report View**.
3. **Save report as an external file:** This requires a special set up. You must have made previous arrangements for this delivery type with the BICC
4. **Email delivery options:** Email options are used to add additional users, update subject and body, and verify report output delivery. Use the information below to build your scheduled report email.

**Send Report by email:** Make sure this option is selected.  
\*Notice there are *No recipients*.

Select *Edit details* to add recipients including yourself and others (optional). This location allows you to customize the email.

**To include yourself and other on the email:** User's email address auto fills.

**Adding additional recipients:** Clicking to the right of your ID and begin typing another user's FULL PURDUE EMAIL address. Once their full address is entered, you can either hit tab or enter to start typing the next user's email address. OR you can select the cc: or bcc: box to add the user email(s) in either of those sections instead.

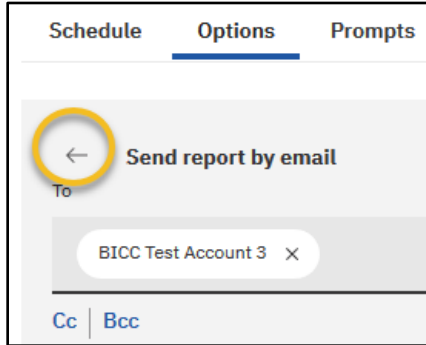
**Subject line & email body:** You can revise the Subject line and enter additional information into the email body if desired.

**Including a link:** Use this option if you need the report to stay within Cognos. Recipients receive the *link* and log into Cognos to review the output. Recipients *must* have access to Cognos to use the feature. This is the more secure option for report delivery.

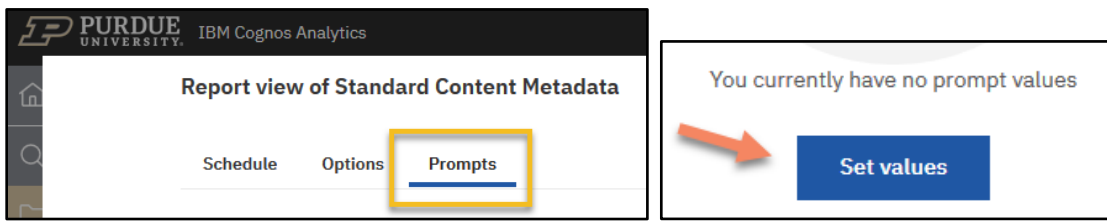
**Attach report output:** Use this option if you want the output as an email attachment. All output types can be attached. This option is less secure. Consider any sensitive report output before using this feature. Recipients do not have to have access to Cognos to view the output.

- 5. **Send report to mobile device:** Do not use. This feature does not work.
- 6. **Print:** Do not use. This feature does not work.
- 7. **Prompts:** This is where you would maintain the prompt values if the report contains a prompt.

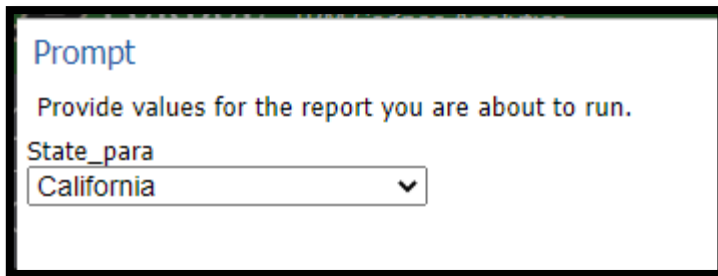
2. Select the back arrow to save any changes



3. Choose **Prompts** to set values.



4. The report view opens so the prompt values can be set up.



## Example of other prompt pages:

- 5. The three prompts are optional for this report and therefore would not need a value chosen. However, in this case the values will be set. Choose the prompt values shown below and leave the **Key Word Search** prompt blank and then click **Submit**. \*The prompts are now saved on the schedule.

**Subject Area (Optional)**

- Admissions
- Degrees
- Endowment
- FI
- FM
- GM
- HR
- STU
- 

Select all Deselect all

**Key Word Search (Optional)**

**Title (Optional)**

- Advisor Continuing Student Workspace
- Advisor STAR Workspace
- All Assigned Instructors with Emails
- All Assigned Instructors with Emails-Course ID Sort**
- Animal Transaction for Grants and Sponsored Programs
- Annual Budget Summary
- Applicants and Admits by Geographic Location & High School - Census
- Asset Summary
- Athlete Data for TeamWorks
- Athletic Ticket Sales
- Average Credit Hour Distribution - Frozen

Select all Deselect all

Cancel Submit

- 6. The values are now in the **Property** pane in the **Current values** pane. You can delete or edit the values by clicking these icons.

Report view of Customer lifetime value analysis

Schedule Options **Prompts**

Q Find

↑↓ 🗑️ ✎

Parameter name	Parameter value
State_para	California

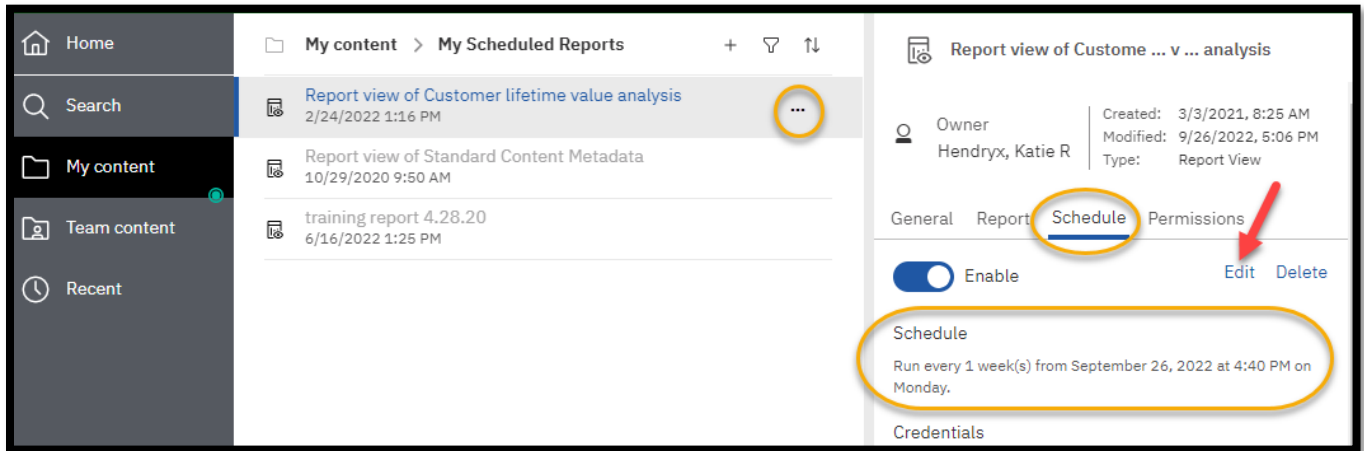
- 7. **Languages:** English is the default language and in most cases, you won't need to do anything.
- 8. Click on the **Save** on the **Properties** pane to create the schedule.

➔ Save Cancel

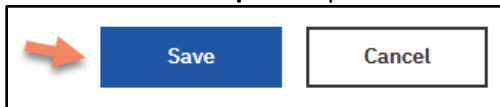


## Edit Prompts in a Schedule


1. **Navigate** to open **My Scheduled Reports** folder. Click on the **ellipsis** to the right of the report title and choose **Properties**, click on the **Schedule** tab.
2. Click on the arrow for the schedule just created.

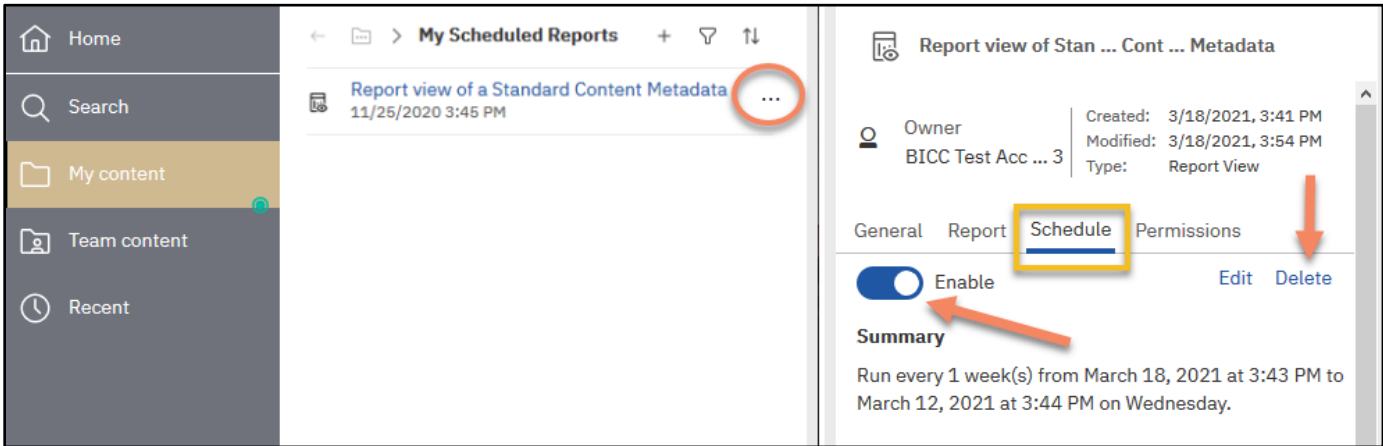


3. To edit the prompt values, click the **Edit** go to the **Prompts** tab. The **Current values** pane will open. Choose **Edit** and update the prompts as desired, or you may also choose **Delete** to remove all prompt values.
4. **Click Save** on the **Properties** pane.



## Disable or Delete a Schedule

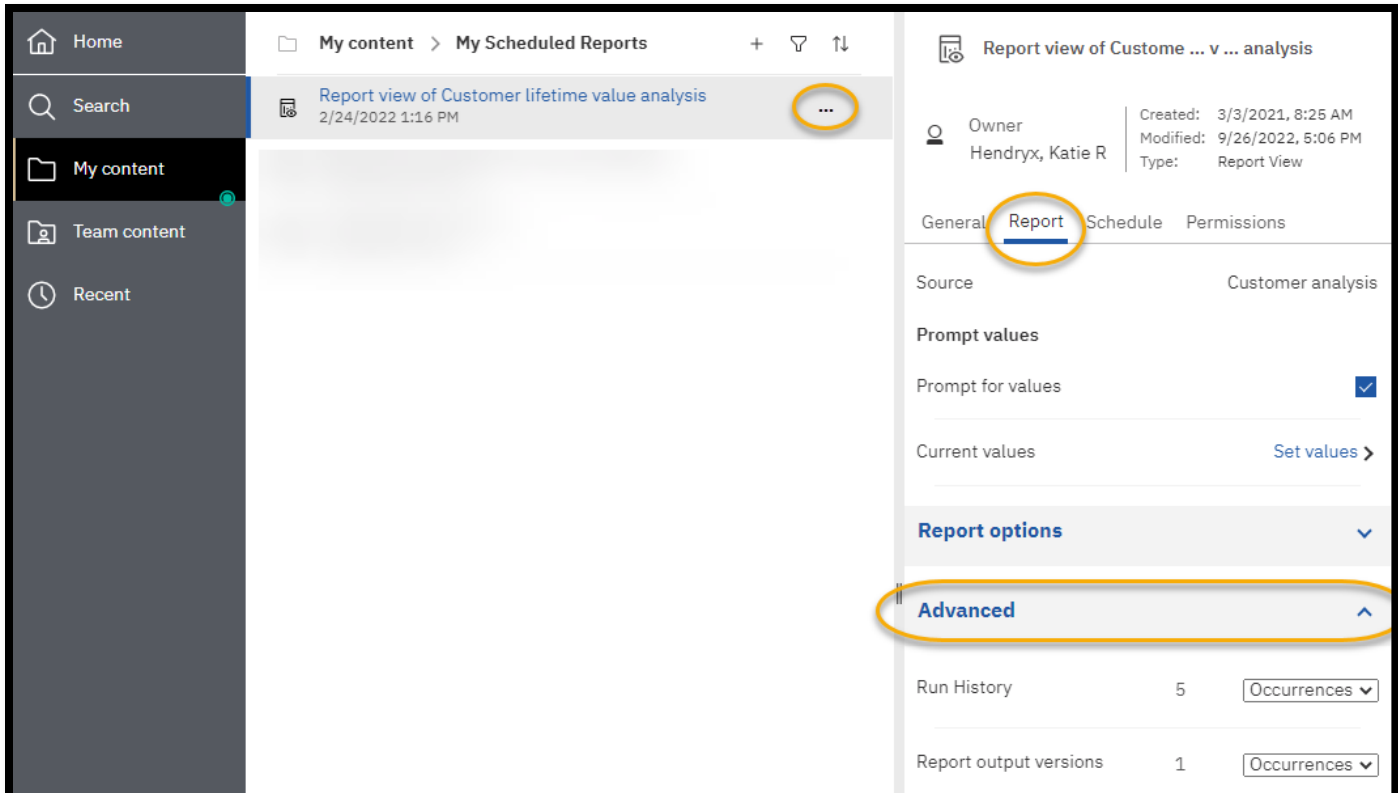
1. Click on the **ellipsis** of the Report View
2. Choose **Properties**
3. Click on the **Schedules** tab
4. To disable the schedule, **click** on the white circle next to **Enable**.  
 If Enabled is grey, clicking on the white circle will enable the schedule. Schedules are automatically enabled when the schedule is created
5. To delete a **schedule**, **click Delete**. The schedule is deleted.



## Set Report Outputs and Run Histories

By default, Cognos keeps a **Run history** of **5** occurrences so you can verify the report processed each time as expected. There is also a **Report Output Version** that keeps the data results from report runs.

1. **Navigate** to the **Customer Lifetime Value Analysis** report. To do so, open **My content > My Scheduled Reports**.
2. **Click** on the **ellipsis** to the right of the report name and **choose Properties**
3. **Click** on the **Report** tab and then **click** on the **Advanced** down arrow.



The screenshot shows the Cognos report properties page for 'Report view of Customer lifetime value analysis'. The interface includes a left navigation pane with 'Home', 'Search', 'My content', 'Team content', and 'Recent'. The main content area shows the report name and a date '2/24/2022 1:16 PM'. The right-hand pane is titled 'Report view of Customer ... v ... analysis' and shows metadata: Owner 'Hendryx, Katie R', Created '3/3/2021, 8:25 AM', Modified '9/26/2022, 5:06 PM', and Type 'Report View'. Below this are tabs for 'General', 'Report', 'Schedule', and 'Permissions'. The 'Report' tab is selected. Under 'Report options', the 'Advanced' section is expanded, showing 'Run History' set to 5 and 'Report output versions' set to 1, both with 'Occurrences' as the duration.

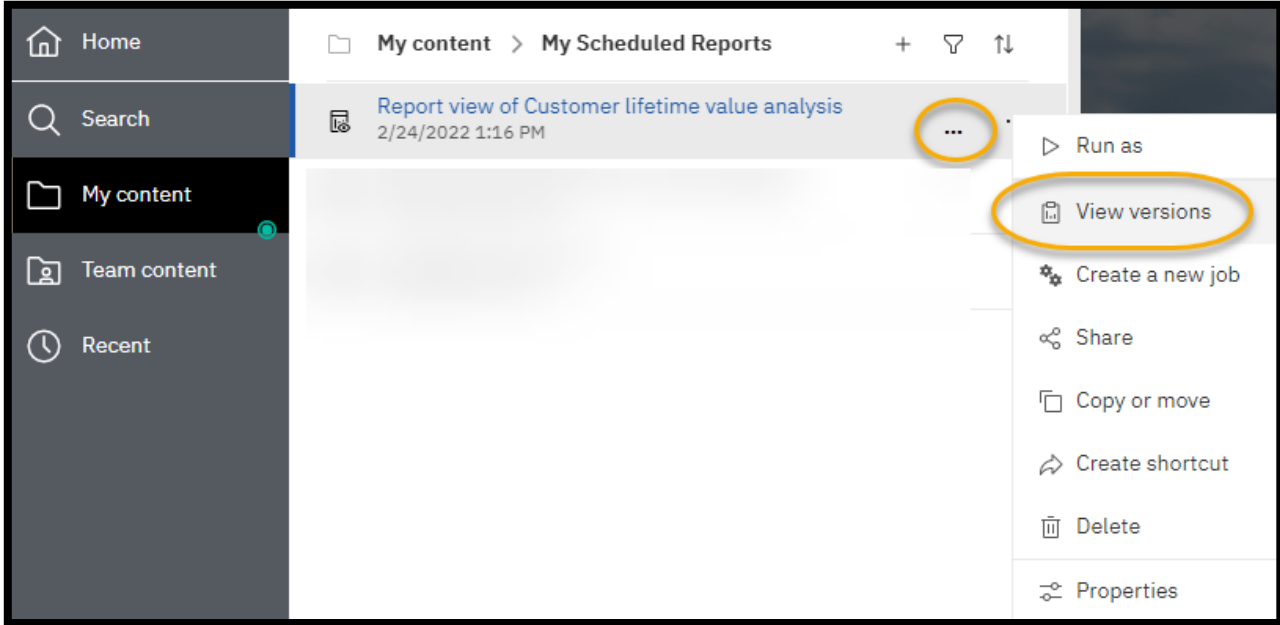
4. **Run history**: displays processing detail. This is a nice feature for testing run times when authoring reports. The run history defaults to the value of **5**. You can change the **Number of occurrences** (double click on the 5 and set it to the desired number of occurrences) **or** select the **Duration** based on your needs (click on the down arrow and set it to the desired duration, choose Day(s) or Month(s) on the drop down list).
5. **Report output versions**: are the number of outputs you want to retain in the content store in Cognos. The run history defaults to the value of **1**. When the report is ran and saved again, the first occurrence is removed and the new one takes its place. You can change the **Number of occurrences** or select the **Duration** based on your needs as you did for the run history.



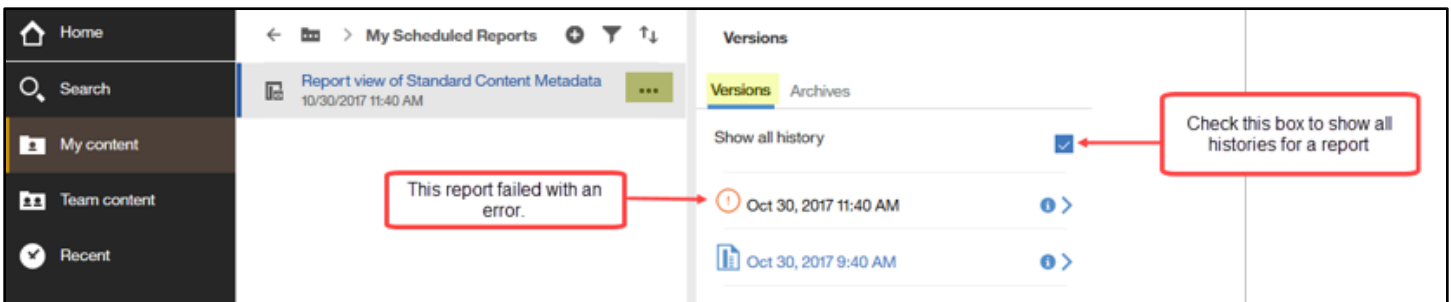
**Note:** These values typically do not need changed. Consider the real need for multiple versions. Storing too many copies can affect Cognos performance for all users and/or cause user confusion.

## View Run History

1. Navigate to the **Customer Lifetime Value Analysis** report. Open **My content > My Scheduled Reports**.
2. Click on the ellipsis to the right of the report and choose **View versions**.



3. The **Versions** panel will open. The last saved version of a successful execution of the report is listed. Check the **Show all history** box in order to view all the executions of the report that is available. You can change the Number of occurrences or Report output versions based on your needs within the schedule itself.



4. Notice that in this example, the first report failed with an error message. To view a successful execution or an error message, **click** on the **blue arrow** to the right of the date and time.

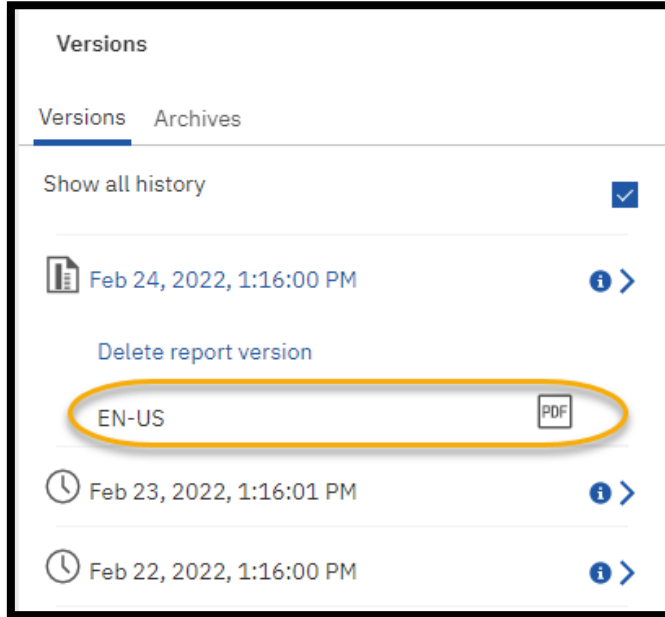


**WARNING: If you click on the name of the report to generate a new report interactively (not scheduled), Cognos will display the last saved version output!**

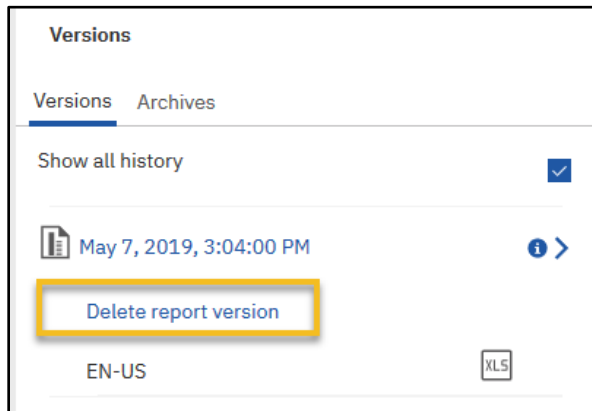
Pictured below are the details concerning each execution of the report.

<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <span>&lt; Back</span> <span>Oct 30, 2017 9:40 AM</span> </div> <div style="border: 2px solid green; border-radius: 15px; padding: 5px; margin: 10px 0;"> <span style="color: green; font-weight: bold;">✔ Successful</span> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0;"> <p><b>Messages</b> <span style="float: right;">^</span></p> <ul style="list-style-type: none"> <li><span style="color: blue; font-size: small;">i</span> CNC-SDS-0408 There are email messages waiting to be sent.</li> <li><span style="color: blue; font-size: small;">i</span> CNC-SDS-0409 The email messages were sent to 1 recipients.</li> </ul> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0;"> <p><b>Run time</b> <span style="float: right;">^</span></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Request time</td> <td style="text-align: right;">Oct 30, 2017 9:40 AM</td> </tr> <tr> <td>Start time</td> <td style="text-align: right;">Oct 30, 2017 9:40 AM</td> </tr> <tr> <td>End time</td> <td style="text-align: right;">Oct 30, 2017 9:40 AM</td> </tr> </table> </div> <div style="padding: 5px 0;"> <p><b>Report</b> <span style="float: right;">^</span></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Formats</td> <td style="text-align: right;">HTML</td> </tr> <tr> <td>Languages</td> <td style="text-align: right;">English (United States)</td> </tr> <tr> <td>Location</td> <td style="text-align: right;">My content &gt; My Scheduled Reports</td> </tr> </table> </div> </div>	Request time	Oct 30, 2017 9:40 AM	Start time	Oct 30, 2017 9:40 AM	End time	Oct 30, 2017 9:40 AM	Formats	HTML	Languages	English (United States)	Location	My content > My Scheduled Reports	<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <span>&lt; Back</span> <span>Oct 30, 2017 11:40 AM</span> </div> <div style="border: 2px solid orange; border-radius: 15px; padding: 5px; margin: 10px 0;"> <span style="color: orange; font-weight: bold;">! Failed</span> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0;"> <p><b>Messages</b> <span style="float: right;">^</span></p> <ul style="list-style-type: none"> <li><span style="color: red; font-size: small;">x</span> RQP-DEF-0177 An error occurred while performing operation 'sqlPrepareWithOptions' status='-126'.</li> <li><span style="color: red; font-size: small;">x</span> UDA-SQL-0219 The function "nvl" is being used for local processing but is not available as a built-in function, or at least one of its parameters is not supported.</li> </ul> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0;"> <p><b>Run time</b> <span style="float: right;">^</span></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Request time</td> <td style="text-align: right;">Oct 30, 2017 11:40 AM</td> </tr> <tr> <td>Start time</td> <td style="text-align: right;">Oct 30, 2017 11:40 AM</td> </tr> <tr> <td>End time</td> <td style="text-align: right;">Oct 30, 2017 11:40 AM</td> </tr> </table> </div> <div style="padding: 5px 0;"> <p><b>Report</b> <span style="float: right;">^</span></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Formats</td> <td style="text-align: right;">HTML</td> </tr> <tr> <td>Languages</td> <td style="text-align: right;">English (United States)</td> </tr> <tr> <td>Location</td> <td style="text-align: right;">My content &gt; My Scheduled Reports</td> </tr> </table> </div> </div>	Request time	Oct 30, 2017 11:40 AM	Start time	Oct 30, 2017 11:40 AM	End time	Oct 30, 2017 11:40 AM	Formats	HTML	Languages	English (United States)	Location	My content > My Scheduled Reports
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- 5. In the below example, the schedule was built to include Excel 2007 Data, PDF, and HTML formats in the email output. All three types are displayed.
- 6. **Clicking** on the output type will open the report in the associated format.



- 7. **If** the report(s) are no longer needed, **click** on the **Delete report versions** can next to the report output.



- 8. **Click OK** in the warning popup window.



**NOTE:** To rerun the report **for current data**, you will need to **click the ellipsis** next to the report name and choose **Run as**. This will *not* execute the schedule.

## Using Jobs to Schedule Multiple Entries

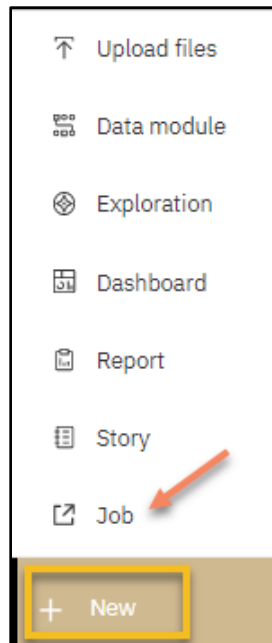
A job allows a user to set the same schedule for multiple reports, report views, and other jobs. The collection of reports (entries) are categorized into a job and scheduled together sharing the same schedule settings. Therefore, when a scheduled job runs, all the entries in the job run. Users can specify running a job all at once or in sequence.

This QRC assumes users know how to **create report views** and **schedule reports**.

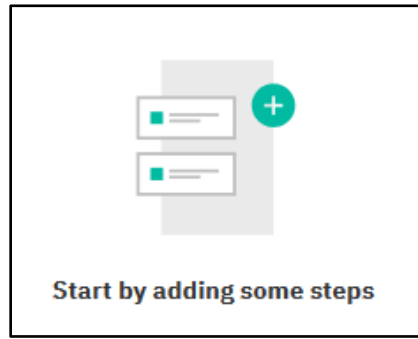
1. Launch Cognos.
2. Create report views of the reports you intend to use in the job or move reports to a specific folder if necessary.
3. NOTE: Disable any schedule(s) currently on the report view(s) you intend to use in the job. If the schedule is not disabled, it will run along with the job schedule.
4. Each report view within the job can be customized (Output format, Delivery and Prompt selections).

### Creating a Job

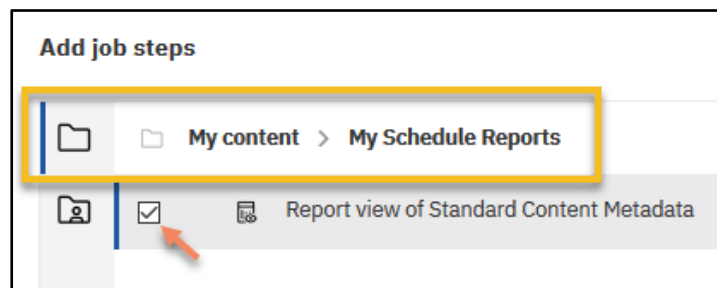
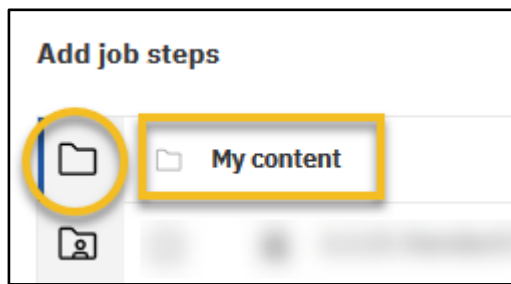
1. To create a job, select the **plus sign** and then choose the **Job** choice.



2. Click on the **Start by adding some steps**.



3. Go to your **My Content** folder and in the **My Scheduled Reports** folder and check the box next to **Report view of a Customer Lifetime Value Analysis**



4. Now click **Add job steps**
5. It is recommended the prompt values are set in the report view. Setting prompt values in the report view will allow for easier management of the prompt values.
6. Hover over the report view and select the pencil to **Edit options**

<input type="checkbox"/>	Type	Name	Step options	
<input type="checkbox"/>	Report view	Report view of Standard Content Metadata	Defined by report	

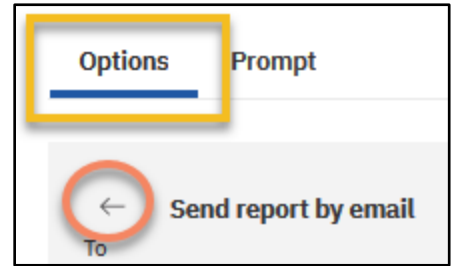
7. The **Options Tab** allows you to select the report output format as well as the delivery option.
8. The **Prompt Tab** allows you to save the prompts on each report view.

NOTE: If you would like to have the reports within the job emailed to you/others, continue to the **Emailing the Reports within a Job** section.



Emailing the Reports within a Job

- 9. The same process is completed to creating a scheduled report.
  - a. Select a format output **HTML**
  - b. In the Delivery section, select **Send report by email**
  - c. Click on **Edit details** to add recipient(s) to the scheduled Job.
  - d. Use the arrow under the Options tab to get back to the options menu.



- 10. Now click on the **Prompts** tab.
- 11. Click on **Set values** to enter your prompts.
- 12. When finished, click **Submit/Finish** and now your prompt values are saved.
- 13. Select **Close** to get back to the **Steps** page.

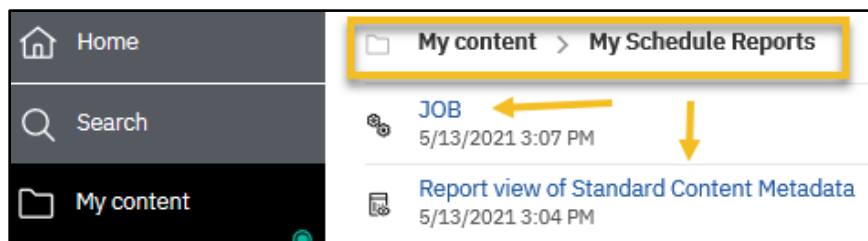
- 14. In the **Run Options** section, Under **Run Order** select **Run in sequence**.
  - a. The **Run in sequence** selection means the entries are executed in the order they appear in the **Steps** lists. Run in sequence means when one report finishes running the next report will run and is **BEST PRACTICE** as this allows report executions to be staggered so the system resources are not taxed.
  - b. Make sure **Continue on error** is **Enabled**. If this is checked, the job will not stop if it runs into an error with a report.

- 15. If an asterisk is still visible on the Application bar, the Job has not been saved. Click **Save**



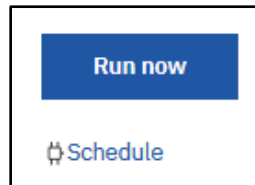
- 16. Select the location where you want your Job housed. It is recommended you save the job and report view(s) in the same folder location.

- 17. Enter the **name** for this job and click **Save** in the **My Schedule Reports** folder.



**Scheduling the Job**

18. Navigate to the folder that contains the job.
19. Click on the **ellipsis** to the right of the job and then the **Properties** option.
20. Select the **Schedule** tab and click on **Create schedule**.
21. Another way to view your schedule options is to go into the Job properties
22. Notice under the **Run Options** area, **Run Now** is an available option as well as **Schedule**

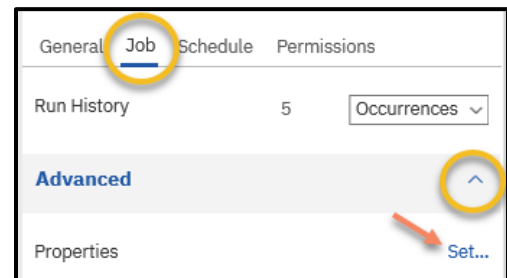


- a. **Run now** allows you to easily run all reports in the job.
- b. **Schedule** is a feature to run the job(s) at recurring dates and times based on your business needs. The output can be saved to the Cognos servers and/or emailed to user’s Purdue email accounts. Users have the option of disabling the schedule and re-enabling it without removing the report(s) from the scheduled objects.

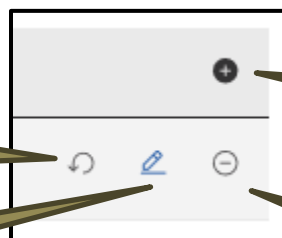
23. Click **Schedule** and **Create schedule**
24. Select the appropriate **Frequency and Start/End time** for the schedule.
25. Then **Save**. The job set-up is now complete.

**Editing the Job or Schedule**

26. Navigate to the folder that contains the job.
27. Click on the **ellipsis** to the right of the job and then the **Properties** option.
28. Select the **Job** tab and click on the word **Advanced**.
29. Click on **Set** to open the Job.



**Reset Options to Default**  
Removes the output format and delivery of the Report view

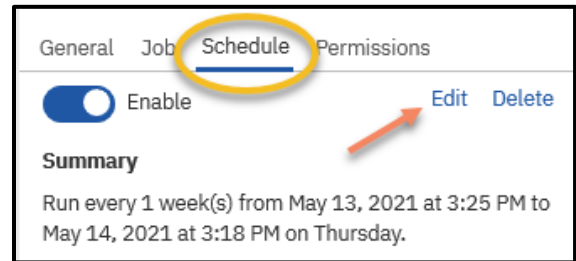


**Add Job Step** Click the plus sign to add additional reports to this job

**Edit Options** Allows you to customize the output format, the Job delivery, and make edits to the prompt selections

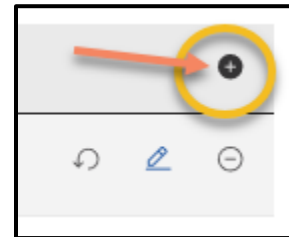
**Remove Job Step** Deletes the reports within the Job

- 30. To make changes to the schedule, go to the **Schedule** tab.
- 31. Click **Edit** to get into the Job **Schedule**.
  
- 32. Click **Save** when finished editing the job properties or schedule.



### To add a report view to an existing Job

- 33. Navigate to the folder that contains the job.
- 34. Click on the **ellipsis** to the right of the job and then the **Properties** option.
- 35. Select the **Job** tab and click on the word **Advanced**.
- 36. Click on **Set** to open the Job.
- 37. Click on the plus sign to **Add Job Steps**
- 38. **NOTE: Repeat steps 3-15**

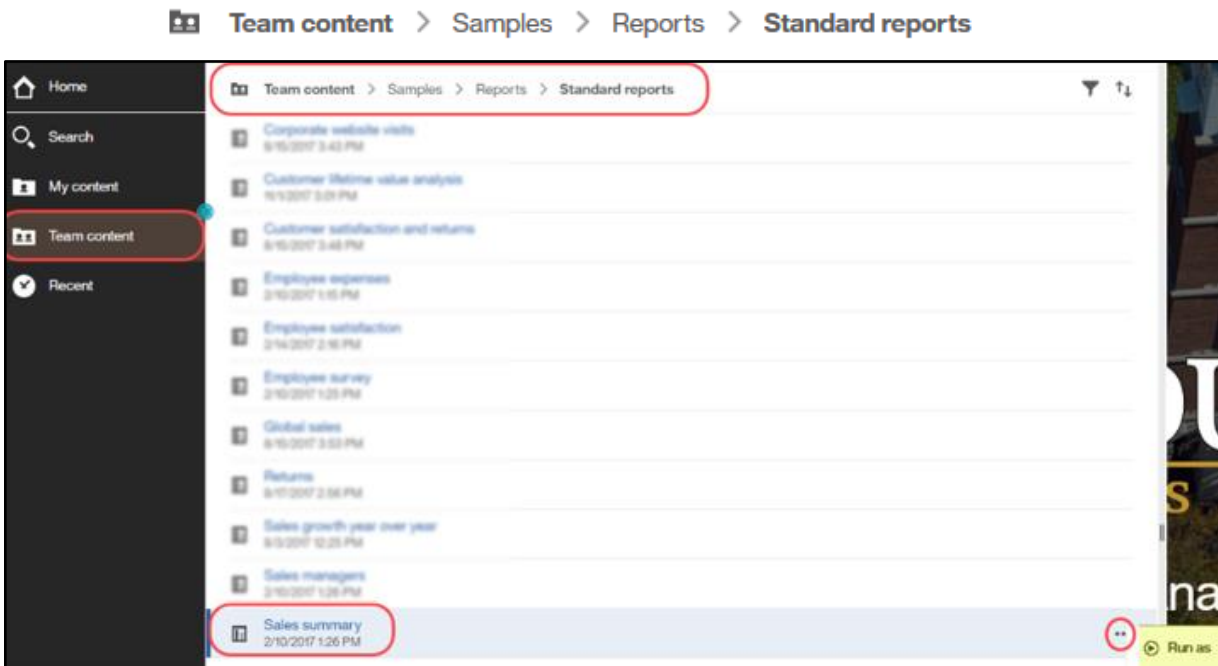


# Subscriptions

Subscriptions are reports that you set up to run like a schedule but the report is only for *you*. This could be useful for reports that you run for auditing on a regular basis.

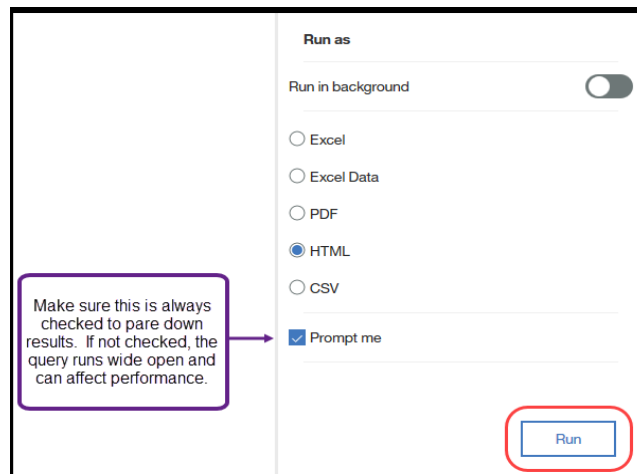
## Setting up a Subscription

1. Navigate to the **Sales Summary** report following the bread crumb memo below. **Click** on the **ellipsis** on the right side of the report name, **Sales Summary**, and choose **Run as**.

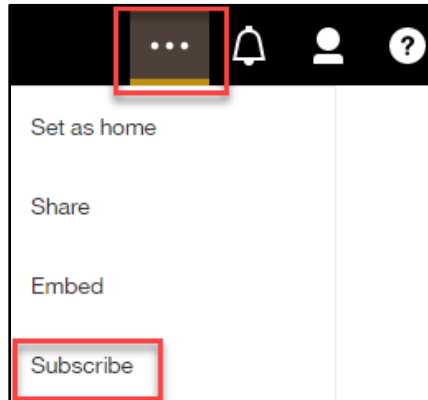


2. The **Run As** pane will open. **Click Run**.

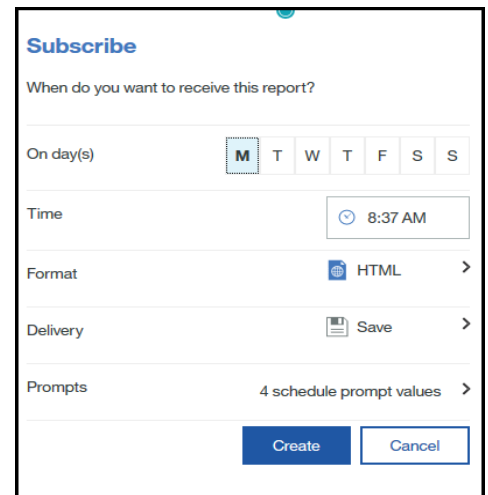
This report does not have any prompts, but if it did, the prompt pane would open here allowing you to filter the report.



- Once the report executes and displays the results, click the **More** ellipsis and choose **Subscribe**.

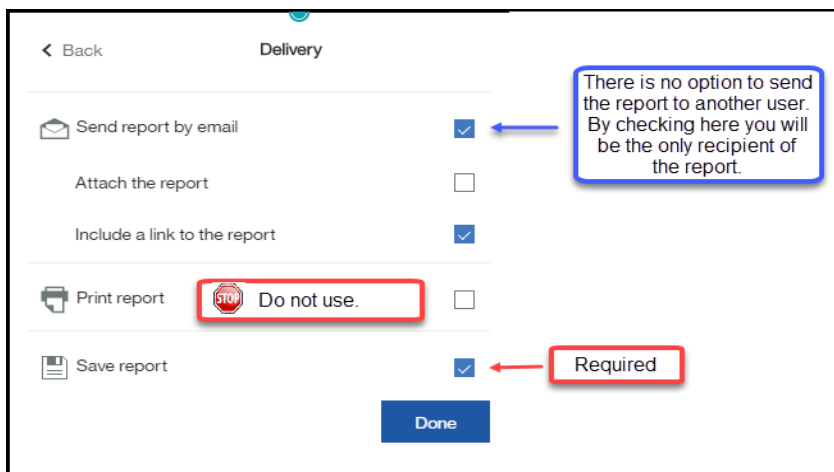


- The **Subscribe** panel will open. This is where you set/review the report subscription options.  
You can choose multiple formats as you did for a schedule.  
If the report contained prompt values that you chose when you executed the report they are retained and cannot be updated here. You will need to rerun the report with different prompt values to update them or you can update them in your **My Schedules and Subscriptions** space (described starting on page 29).



Click on the **Delivery** arrow.

- The Delivery panel opens. You **cannot** email the subscription to another user.

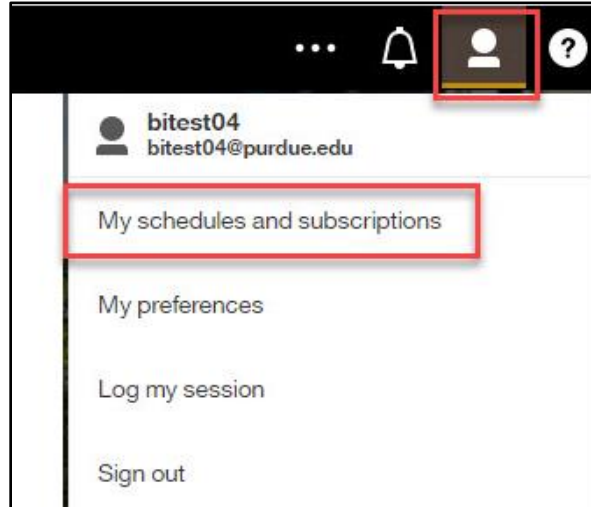


- Click on **Done**, then **Create** to create the subscription.

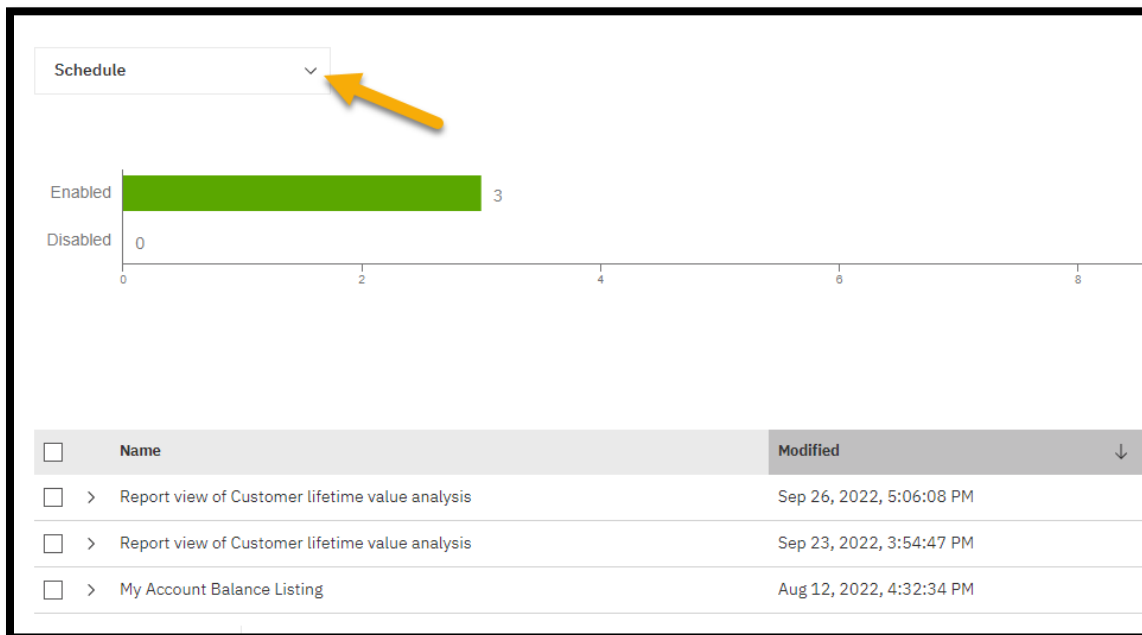
# My Schedules and Subscriptions

**My Schedules and Subscriptions** displays user schedules and subscriptions and can be used to research failed report schedules, delete schedules/subscriptions, and modify schedule/subscription rules.

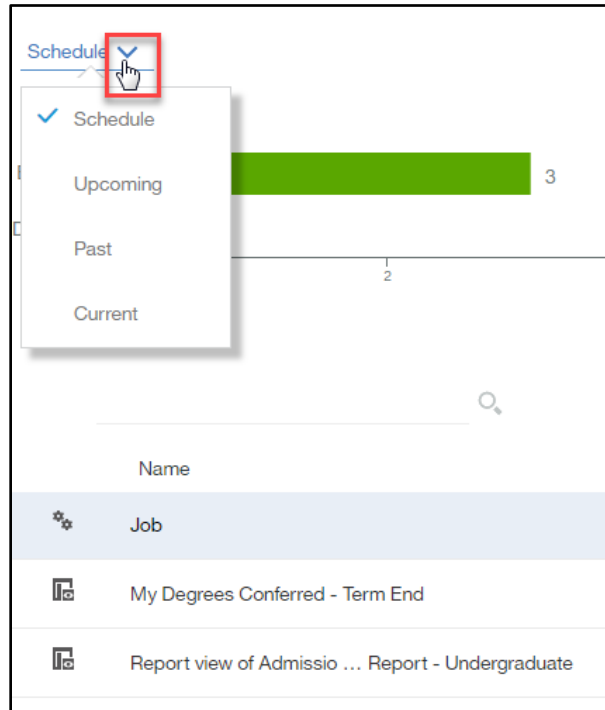
1. On the Application bar, select the **me** icon.
2. Click on **My schedules and subscriptions**.



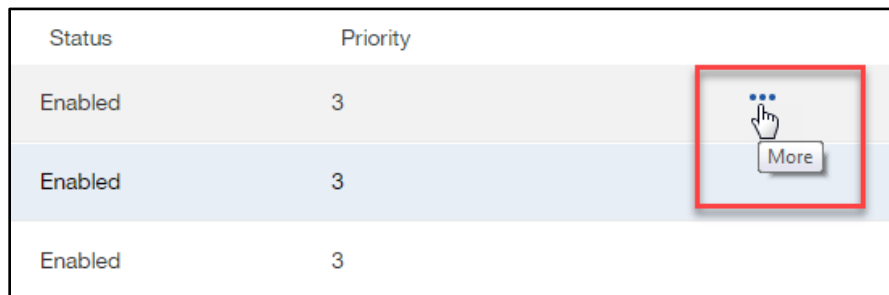
3. Your schedules and subscriptions will be displayed.



- 4. The default view of the **My schedules and subscriptions** space is set to *Schedule*, but you can choose from the switcher which view you would like to see.



- 5. To view the properties, modify the schedule/subscription, and other options, click on the ellipsis to the right of the schedule/subscription and choose your appropriate choice.



6. The options are dependent on if you are looking at a **schedule** or a **subscription**.

Schedule	Subscription
<ul style="list-style-type: none"> <li>▶ Run once</li> <li>⚙ Properties</li> <li>📅 Modify this schedule</li> <li>📄 View versions</li> <li>⊘ Disable this schedule</li> <li>⊖ Remove this schedule</li> </ul>	<ul style="list-style-type: none"> <li>▶ Run once</li> <li>📅 Modify this subscription</li> <li>📄 View versions</li> <li>⊘ Disable this subscription</li> <li>⊖ Remove this subscription</li> </ul>

7. The **Schedule** choices allow you to modify your schedule along with many other options which were described earlier in this manual, starting on page 11.
8. The **Subscription** choices allow you to modify your subscription, view your subscription’s versions, disable the subscription, and remove the subscription.
9. To cancel a scheduled report or a report running in the background, use the **Current** view to *Cancel* the run. Using the *Cancel* feature is helpful in keeping the Cognos server performing at optimal level when a report is not returning as quickly as expected.





## Departmental Scheduled Reports

### How do I know if I have write access my departmental folders?

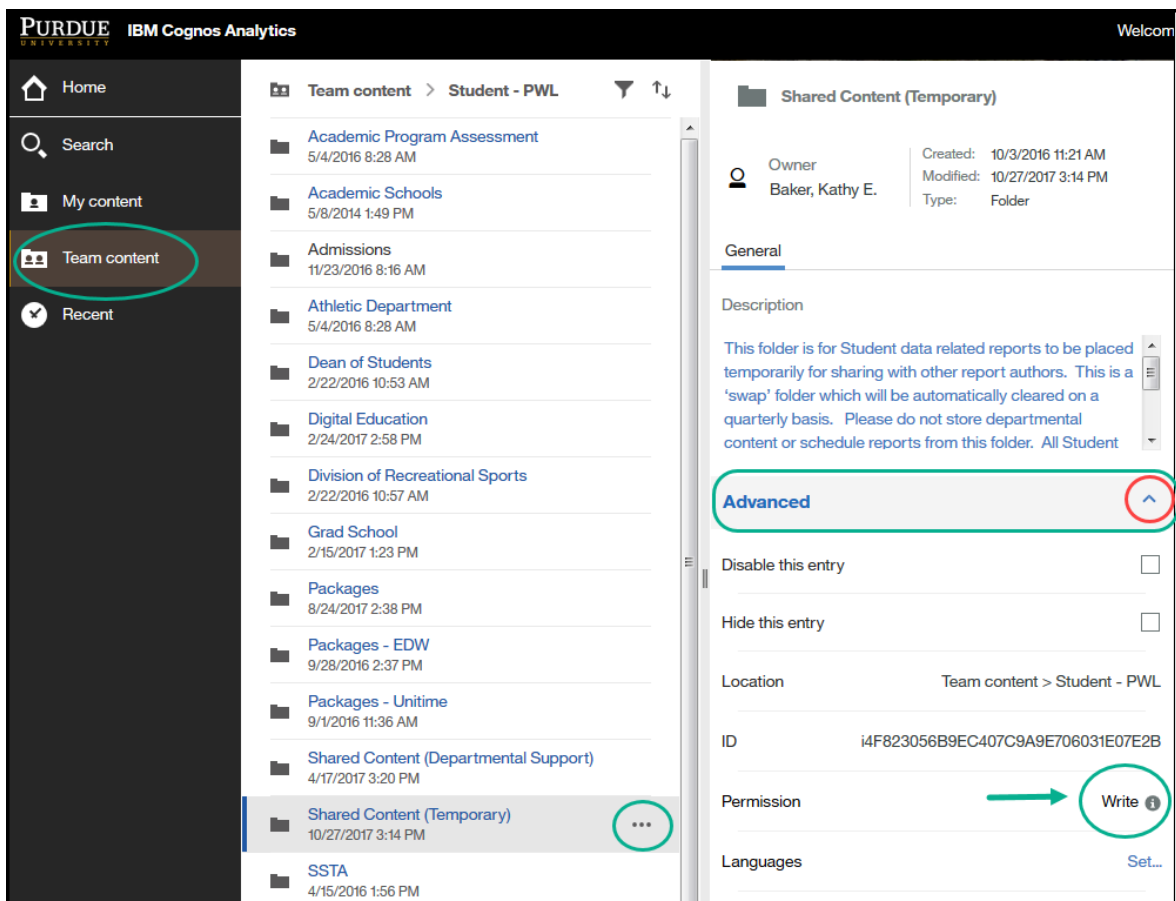
Departmental scheduled output can be based out of departmental folders if the user has write access to the folder containing the report. This works well if users within the department need to share report output. **Please work with your Cognos Departmental Administrator on the preferred option for your area.**



**Note:** Users **MUST** have write access to the departmental folder where the report is stored to set up a schedule within the departmental folders.

### Do I Have Write Access to My Departmental Folder?


1. **Find** a report currently saved in your Cognos departmental folder.
2. **Click** on the **ellipsis** to the right of the report name.
3. **Click** on **Properties**.
4. **Click** on the **Advanced** down arrow.
5. Your permission will be to the right of the word **Permission**. You will need either **Write** or **Full** permission to save to your departmental folder.

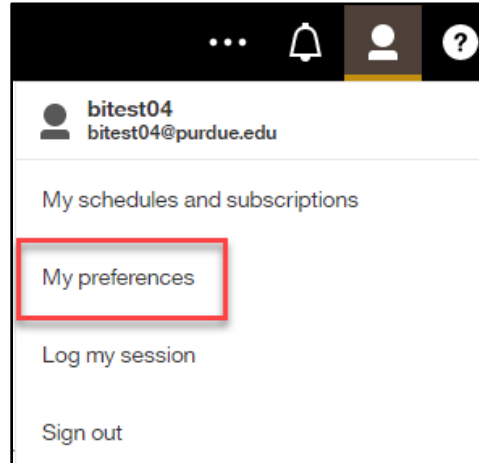


**Please work with your Cognos departmental administrator for questions on folder access and/or scheduling shared departmental output.**

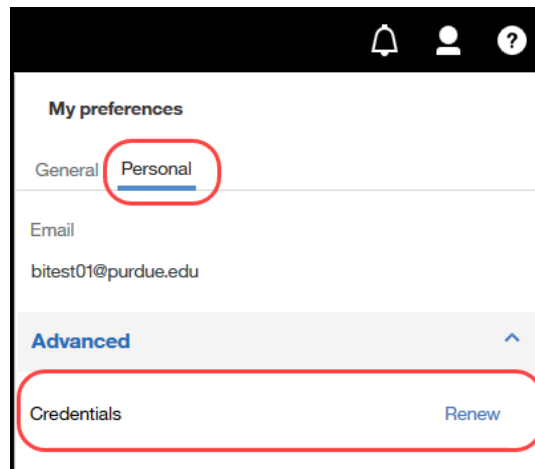
# Renewing Cognos Credentials after Network Password Change

Renewing your credentials in Cognos after changing your network password is required to avoid disruption of scheduled reports running on a daily, weekly, or monthly basis.

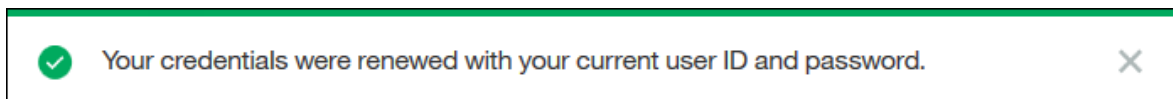
1. **Login** to Cognos and click on the  icon; **click** on the **My Preferences** link.



2. **Click** on the **Personal** tab. **Click** the **Advanced** down arrow. **Under** the **Credentials** section of the **Personal** tab, **click** on **Renew**.



3. A message box will appear confirming the credentials have been renewed.



## Cognos Scheduler Policies and Procedures



Below are the policies and procedures for using the schedule component in Cognos. The policies are used to protect the shared environment which affects all report consumers. Abiding by best practices and adhering to policy will preserve the integrity and performance of the Cognos reporting environment for all.

User Process / Schedule	Explanation / Risks	BICC Policy / Actions
<p>Student data reports are <b>NOT</b> to be scheduled or ran between 12:00AM and 5:00AM.</p> <p>~~~~~</p> <p>HR and FI data are <b>NOT</b> to be scheduled or ran Monday-Friday 6:00AM to 7:00AM Saturday 9:00AM to 9:30AM</p> <p>~~~~~</p> <p>University Development reports are <b>NOT</b> to be scheduled between 11:45PM to 5:00AM.</p>	<p>This is to allow the overnight processes within ODS and SAP to complete. Scheduled or manually running reports during those hours will result in no data, incomplete data, or incorrect data which slows down the delivery of data for all users</p>	<p>The BICC will review the schedule quarterly for reports scheduled during data processing times. Users will be notified to change schedule times.</p>
<p>Scheduled reports should <b>NOT</b> be scheduled between 4:00PM and 12:00AM on Saturday nights.</p>	<p>These times are Purdue ITAP maintenance window times and should be avoided as systems can be down during this time.</p>	<p>The BICC will review the schedule quarterly for reports scheduled during data processing times. Users will be notified to change schedule times.</p>
<p>Keep saved report output to a minimum for business needs.</p>	<p>Move the saved output to another secured location or delete them.</p>	<p>The maximum output copies allowed is dependent on number of copies and/or file size. Deletions will be at the discretion of the technical team and user.</p>
<p>Disable inactive scheduled reports from the scheduler when not being actively used.</p>	<p>Change status to Disabled when schedule is not needed for a <u>short length of time</u>. Like term to term reporting.</p>	<p>The BICC will review the schedules bi-annually and remove expired or failing reports.</p>
<p>Delete reports from the scheduler when no longer needed or past their expired date.</p>	<p>This aids in keeping the maintenance manageable within the Cognos systems.</p>	<p>The BICC will review the schedule quarterly and remove expired or failing reports.</p>
<p>Renew credentials each time your Purdue account password is changed.</p>	<p>Scheduled reports will not run until the credentials are updated.</p>	<p>BICC will review credential issues and send users a warning email.</p>
<p>Departmental report Schedules should be scheduled from departmental folders.</p>	<p>My Content should not contain departmental scheduled report data. My Content is for personal report consumption. The risk is employee changes and losing report data the report was scheduled from My Content.</p>	<p>Objects from My Content will be deleted 30 days after an employee separates from the university.</p>

\*Disabled or Expired schedules over 1 year old are subject to removal without notification.

## Cognos Scheduler Best Practices Guide

The list below contains best practices for using the schedule feature. Abiding by these guidelines will assist in keeping the Cognos systems running smoothly for everyone. Please refer to them when considering adding a report to the scheduler.

- **Make a Copy of the Original Report** - This will avoid saved scheduled copies being unknowingly used by others. Schedule departmental reports from the departmental folders. Copies can be saved within your My content, but *if the report output is to be shared with others, place the copy in the departmental folder*. Use the **Create report view**  feature found with the original report to make the copy. Report View ensures your new scheduled copy will receive any updates made to the original report. Shortcuts are problematic as links are broken if the original report is moved to another folder in Cognos. Using Report View ensures you will not lose your link to the original report.
- **Use My schedules and subscriptions** – This feature is found under the me  icon on the Application bar. It displays user schedules and subscriptions and can be used to research failed report schedules, delete schedules, and to modify the schedule rules.
- **Remove Inactive Schedules and Subscriptions** - Review your Schedules and Subscriptions and delete those no longer needed. This helps prevent unnecessary report runs against the Cognos system.
- **Maintain a Record of Current Schedules** – Create a spreadsheet of scheduled reports. Include when the report is scheduled to run, any date/term prompts and when they need changed, and everyone who receives a copy of the scheduled output. This will also help you maintain proper report output and aid supervisors in the event of employee departure or time away.
- **Cognos Email Notifications** – Users need to be aware when Cognos is unavailable and if it will affect your scheduled report(s). Cognos users can sign up for Cognos Service Alerts at:

[https://lists.purdue.edu/mailman/listinfo/service\\_alerts\\_for\\_cognos](https://lists.purdue.edu/mailman/listinfo/service_alerts_for_cognos)

OR

- Watch for Cognos, ODS, EDW, or Boiler Insight (HR and FI) email notifications from the BICC containing information on system down times.



***Please take time to review email messages and be aware of any scheduler disruptions. Users may need to run the reports manually if Cognos was unavailable during scheduled run times.***

## Troubleshooting

Users may contact BICC at [bicc@purdue.edu](mailto:bicc@purdue.edu) with questions specific to this manual or for any Cognos questions or issues.

### Feedback on this Document

Questions and feedback specific to this document are welcomed. Please email your comments to [bicc@purdue.edu](mailto:bicc@purdue.edu).