

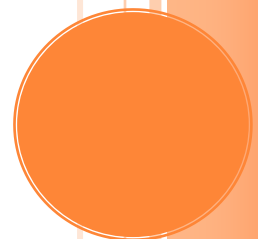


# COGNOS

## *Scheduling Reports*

IMSS

10/1/2011





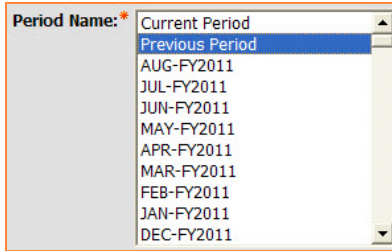
## TABLE OF CONTENTS

|                              |    |
|------------------------------|----|
| Overview .....               | 3  |
| Scheduling a Report.....     | 3  |
| Saving the Report .....      | 3  |
| Setting the Schedule.....    | 5  |
| Format of the Report .....   | 6  |
| Delivery Method .....        | 7  |
| Report Parameters.....       | 8  |
| Modifying the Schedule ..... | 10 |
| Removing the Schedule .....  | 11 |



# Overview

Some canned reports in the Grants Accounting datamart have had the period name parameter modified to include *Current Period* and *Previous Period*.



The *Previous Period* parameter allows you to schedule the reports to be run at the beginning of each month without you having to update the period name.

The reports that currently have this capability are:

- *FY and ITD – Project or Project/Task Summary*
- *FY and ITD – PTA Summary*
- *PTA Cost Detail – Print*
- *PTA Salaries*

# Scheduling a Report

## Saving the Report

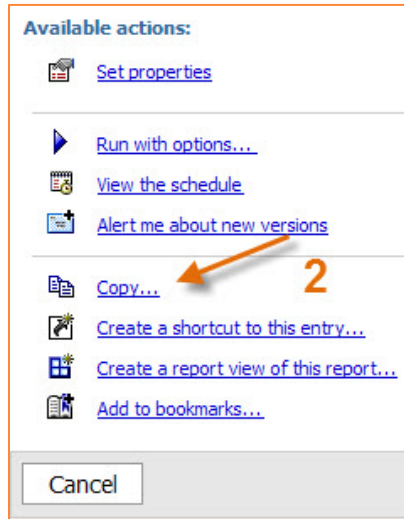
To schedule a report you must first save a copy of the report to *My Folders*. A scheduled report may only have one set of parameters, so if you plan on scheduling a report for two or more PIs, you must save multiple copies of the report.

1. Navigate to the report and click on the *More...* link.

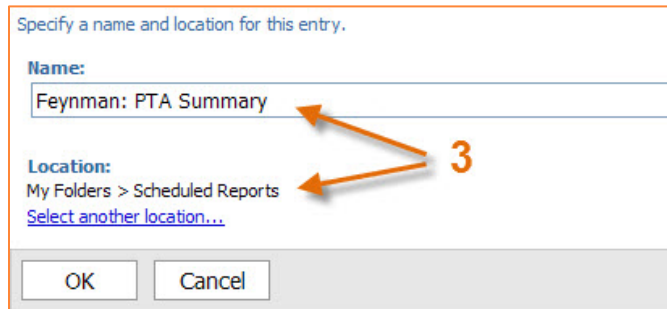




2. Click on the *Copy...* link.



3. You will be prompted to enter the name of the report and select the location for saving the report. The default location is your *My Folders* area.




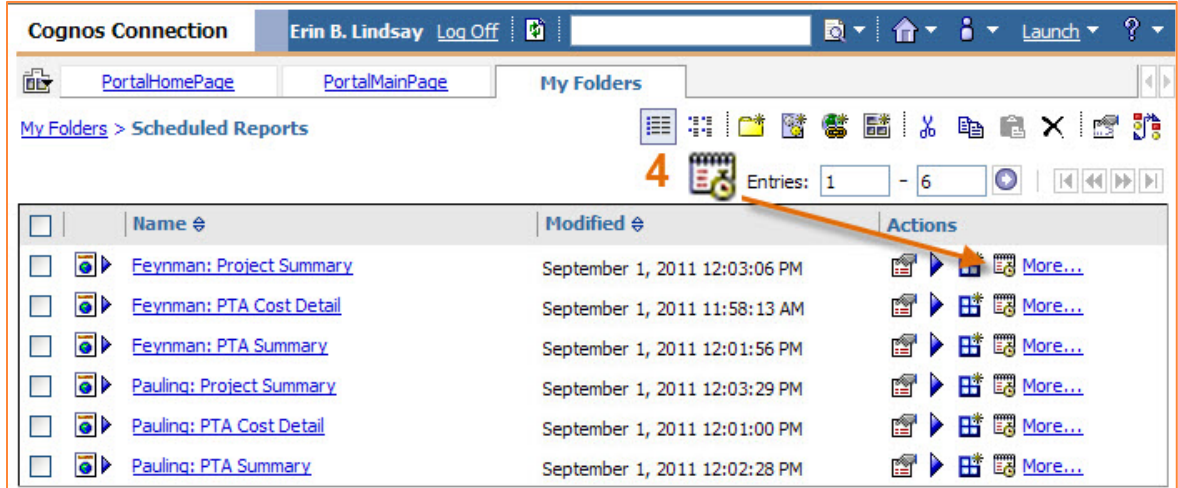
**NOTE:** When scheduling reports you are able to choose if the report will be emailed, and the email subject header will default to the name of the report.

**TIP:** If you are scheduling reports for more than one PI, create a subfolder in *My Folders* and use a report naming convention that allows you to easily differentiate between both the PIs and the different reports.



## Setting the Schedule

4. Navigate to the saved report and click on the *Scheduling*  icon. This will open the *Schedule* window. PLEASE NOTE that the report to be scheduled must have

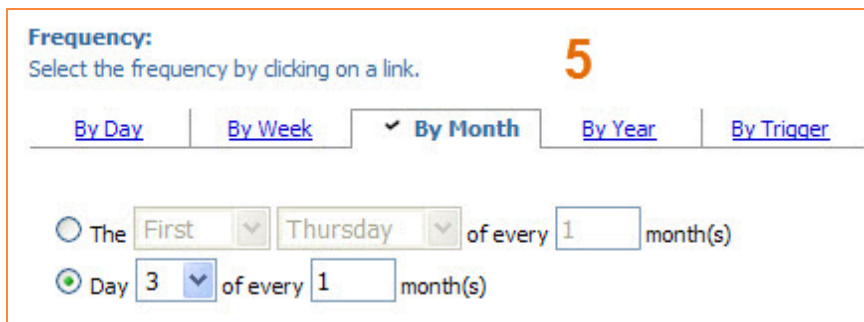


The screenshot shows the Cognos Connection interface. At the top, the user is identified as Erin B. Lindsay. The breadcrumb navigation shows 'My Folders > Scheduled Reports'. A toolbar contains various icons, with a calendar icon (labeled '4') and a 'Scheduling' icon (labeled '5') highlighted. Below the toolbar is a table of reports:

| <input type="checkbox"/> | Name                                     | Modified                      | Actions                 |
|--------------------------|--|-------------------------------|-------------------------|
| <input type="checkbox"/> | <a href="#">Feynman: Project Summary</a> | September 1, 2011 12:03:06 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Cost Detail</a> | September 1, 2011 11:58:13 AM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Summary</a>     | September 1, 2011 12:01:56 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: Project Summary</a> | September 1, 2011 12:03:29 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Cost Detail</a> | September 1, 2011 12:01:00 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Summary</a>     | September 1, 2011 12:02:28 PM | <a href="#">More...</a> |

**TIP:** Schedule reports to run between 10am-5pm Monday-Friday so that it doesn't interfere with any of the processing between Oracle and Cognos. In addition, schedule monthly reports to run on the 3<sup>rd</sup> or 4<sup>th</sup> day of the month to ensure that the previous month has been closed and updated properly in Cognos.

5. Choose the *Frequency* in which you want the report to run. For example, if you would like to have the report run automatically on the third day of each month, click on *By Month* and select the correct settings.



The screenshot shows the 'Frequency' configuration window. It includes a title 'Frequency:' and a subtitle 'Select the frequency by clicking on a link.' There are five radio buttons for frequency options: 'By Day', 'By Week', 'By Month' (selected), 'By Year', and 'By Trigger'. Below these, there are two radio buttons for monthly scheduling: 'The First Thursday of every 1 month(s)' and 'Day 3 of every 1 month(s)' (selected). A large number '5' is displayed in the top right corner of the window.



6. Indicate when you want the schedule to *Start* and *End*.

**Start:**  
Sep 3, 2011  
12 : 09 PM

**End:**  
 No end date  
 End by:  
Sep 3, 2011  
12 : 09 PM

## Format of the Report

7. Check the *Override the default values* in the *Options* in order to indicate the *Format* (e.g., HTML, PDF, etc.) and *Delivery* of the scheduled report. This will expand the information.

**Options**

Override the default values

**Formats:**  
Default

**Languages:**  
Default

**Delivery:**  
Save the report

8. The default output when scheduling a report is HTML. You may select additional output types (e.g., PDF, Excel, CSV, etc.) from this section. Clicking on *Set...* allows you to specify the orientation and paper size to use for PDF reports and specify that passwords are needed to open PDF reports, use PDF options, or both.

**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



**TIP:** If you plan on having the reports emailed, uncheck HTML and check PDF. With PDF there are other options available, such as if the report will be portrait or landscape, or if you want to password protect the report. If you don't modify these options, then the defaults associated with the report will be used.

## Delivery Method

9. Reports may be scheduled to do any one or combination of the following:
  - Saved to Cognos (which requires logging into Cognos to view);
  - Printed to a specific printer; and/or
  - Emailed to a specific user or users. The email may include:
    - A link to the report saved in Cognos (which requires logging into Cognos to view); and/or
    - The report attached to the email.

**NOTE:** If you do not want reports saved in Cognos, then uncheck the *Save the report* box.

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

Save: 9

Save the report

Save the report as a report view [Edit the options...](#)

... > Report View of Pauling: Project Summary

Print the report

**Printer location:**

[Select a printer...](#)

Send the report by email [Edit the options...](#)

Erin B. Lindsay (elindsay)

10. If you want the report sent by email, then click on *Edit the options*.
  - a. *To:* defaults to your email address. Additional email addresses may be entered manually, but need to be separated by a semicolon (;).

**NOTE:** We suggest that you manually enter additional emails rather than use the *Select the recipients...* option.



- b. *Subject*: defaults to the name of the report, but may be changed.
- c. *Body*: You may enter a specific message for the Body of the email. This message may help the recipient understand why they are receiving the report.
- d. If you choose *Include a link to the report* the email will include a link, which will require you and any recipient to login to Cognos to view the report.  
If you choose *Attach the report* the report will be attached to the email and you will not have to go into Cognos to view.

The screenshot shows an email composition window with the following fields and options:

- To:** Erin B. Lindsay (elindsay);
- Cc:** feynman@caltech.edu
- Subject:** Report: Feynman: Project Summary
- Body:** Dr. Feynman: This is the Project Summary as of the end of last month for all of your active projects. If you have any questions, give me a call at x3596.
- Include a link to the report
- Attach the report

Annotations in the image: 'a' points to the recipient list, 'b' points to the subject line, 'c' points to the body text, 'd' points to the 'Attach the report' checkbox, and '10' is in the top right corner.

## Report Parameters

11. To determine the parameters for running the report, check the *Prompt values* check box and click on the *Set* link. This will open the report's *Report Filters* window.

The screenshot shows the 'Prompt values' dialog box with the following options:

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

Annotation '11' is in the top right corner, and arrows point to the 'Override the default values' checkbox and the 'Set...' link.





12. Enter each of your preferred parameters. If you plan on running the report at the beginning of each month in order to view the previous month’s activity, then choose *Previous Period* for the Period name. Once all the Report Filters are entered, click on the *Finish* button, and your report filters will be set.

13. Clicking on the *OK* button completes the process of scheduling a report.



## Modifying the Schedule

Once a report has been scheduled there may be a reason to modify the schedule. Perhaps an email address has changed or you would like to receive a link to the report instead of an attached PDF.

1. Navigate to the report and click on the *More...* link.

| <input type="checkbox"/> | Name ↕                                   | Modified ↕                  | Actions                 |
|--------------------------|--|-----------------------------|-------------------------|
| <input type="checkbox"/> | <a href="#">Feynman: Project Summary</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Cost Detail</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Summary</a>     | October 17, 2011 5:47:36 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: Project Summary</a> | October 24, 2011 5:58:45 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Cost Detail</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Summary</a>     | October 17, 2011 5:47:36 PM | <a href="#">More...</a> |

2. Click on the Modify the schedule... link.

**Available actions:**

- [Set properties](#)
- [View most recent report in HTML](#)
- [View report output versions](#)
- [Run with options...](#)
- [Modify the schedule...](#)
- [Remove the schedule](#)
- [View run history](#)
- [Alert me about new versions](#)
- [Do not alert any about new versions](#)

3. Modify the schedule as indicated in the previous section, *Scheduling a Report*.

**TIP:** If you need to temporarily stop having the reports sent, check the “Disable the schedule” box. When you want to resume the schedule, just uncheck the box.



## Removing the Schedule

At some point you may want to stop the schedule all together.

1. Navigate to the report and click on the *More...* link.

| <input type="checkbox"/> | Name ↕                                   | Modified ↕                  | Actions                 |
|--------------------------|--|-----------------------------|-------------------------|
| <input type="checkbox"/> | <a href="#">Feynman: Project Summary</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Cost Detail</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Feynman: PTA Summary</a>     | October 17, 2011 5:47:36 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: Project Summary</a> | October 24, 2011 5:58:45 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Cost Detail</a> | October 17, 2011 5:47:09 PM | <a href="#">More...</a> |
| <input type="checkbox"/> | <a href="#">Pauling: PTA Summary</a>     | October 17, 2011 5:47:36 PM | <a href="#">More...</a> |

2. Click on the Remove the schedule... link.

**Available actions:**

- [Set properties](#)
- [View most recent report in HTML](#)
- [View report output versions](#)
- [Run with options...](#)
- [Modify the schedule...](#)
- [Remove the schedule](#)
- [View run history](#)
- [Alert me about new versions](#)
- [Do not alert any about new versions](#)

3. Confirm that you want to remove the schedule by clicking on the *OK* button.

**Message from webpage**

Are you sure you want to remove the schedule?