Cognos Report Scheduling

A Cognos report can be set up to run unattended at a later time and email the output to you in any of the following document formats:

- HTML
- XHTML
- PDF
- Microsoft Excel 2007
- Microsoft Excel 2007 Data
- Microsoft Excel 2002
- Comma Separated Values (CSV)
- XML

One can schedule reports to run either one time or on a repeating schedule. Both methods will be shown in this tutorial.

Prerequisite: Set Up a Cognos Report View

Prior to scheduling a report, you must create a report view, a copy of the report that is stored in your personal folder within Cognos.

1) From Cognos Connection, click on the More.. icon beside the report you would like to schedule.
2) Click on Create a report view of this report...
3) Optional: Give the report a new name (You can still do this later once the report view has been created by adjusting the properties )
4) Click on Select My Folders Or click on Select another location... and navigate to a folder where you have permission to store a report.
5) Click on Finish. The report has been saved in the selected location.

Part I: Set Up a One-Time Report Schedule

Having created a report view, you are now able to begin creating a schedule for that report. This section explains how to schedule your report to run only a single time.

1) Once you have created the report view, navigate to location the report view was saved to and click on More.. , then click on Set properties .
2) Click on the **Report view** tab. From the **Default action** drop down, select **Run the report**. Click on **Set...** from the **Prompt values** section to bring up the report’s input value prompt page if it has one.
3) Select the values on the prompt page that you want to use in the report and then click on the \textit{Finish} button as if you were normally running the report. Note that after selecting the values on the prompt page and clicking \textit{Finish}, the text in the \textit{Prompt values:} section has changed (see the figure under Step 4). You can click \textit{Edit...} to modify the values you selected on the prompt page.

4) Uncheck \textit{Prompt for values} since we want the report to run unattended and then click on \textit{OK}.

The report view in its current state can be run simply by clicking on it. The report will run with the values that have been selected and will be displayed in HTML format since we have not changed any of the other options of the report.
The next set of steps is intended to set up the general options to be applied when the report view is run: what format the report will have, what will happen to the output after it is run, and when it will be run.

5) Click on More.. and then click on Run with options...

The report options could be set on this screen. We could select a format, click on the radio button, and click on Run. This would run the report immediately and the output would be saved with the report view. However, since we are going to set up a one-time schedule, we can do all of this within the advanced options.

6) Click on advanced options.
7) Click on the ○ Run in the background radio button. After you click on this radio button, the bottom of the screen will transform and various options will be presented. To enter a one-time only scheduler, click on the ○ Later radio button and select the date and time when you want the report to run.

Note: The data in the data warehouse is refreshed nightly, so the data will be the same until the next refresh process.

8) Select the ✔ Save the report checkbox

9) Select the ☐ Send the report by email checkbox. Click Edit the options... to input the email addresses that the report will be emailed to and the body of the text that you would like to be sent along with it.

10) Select the format of the report output. Multiple formats can be selected. Click on the Run button at the bottom of the screen.
A screen will appear that recaps all of your selections. If these are as you intended them to be, click on OK.

The report will then be emailed to the selected recipients at the selected time.

Part II: How to Set Up a Repeating Schedule

A repeating schedule can be set up so that a report runs on a periodic basis. The report can run every day, week, month, or year.

11) Click on the More... link associated with the report view that you want to schedule. Click on New schedule...
12) Set the start and end date for the report schedule and change the frequency the report will be sent out.

Set the start and end date and the frequency of the report.
13) Click the checkbox under the Options header. Follow Steps 8 – 10 to save the report, send the report as an email to the desired recipients, and send the report in the desired file formats.

14) Click the checkbox under the Prompt values header. Follow Step 3 to input the desired values on the report’s prompt page.

15) Hit the OK button to finalize the report’s schedule.