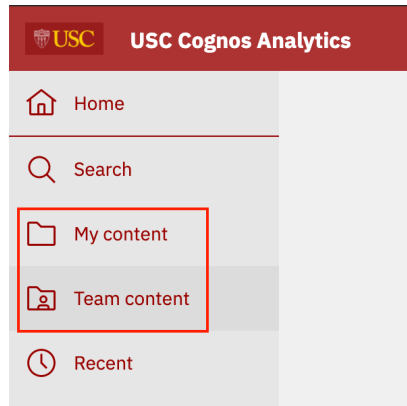


Scheduling a Report in Cognos 11

Locating the Report

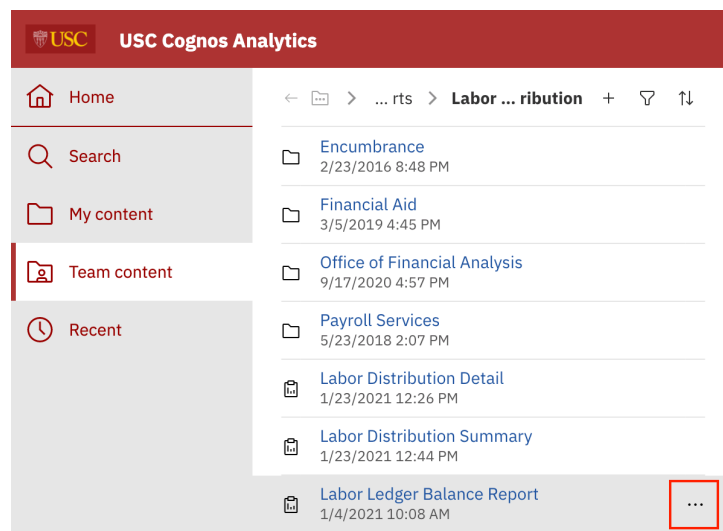
1. Log into Cognos 11: <https://usc.edu/bi>
2. Depending on the report you would like to schedule, click into either the “My Content” or “Team Content” tabs, and navigate to the report you would like to create a schedule for.



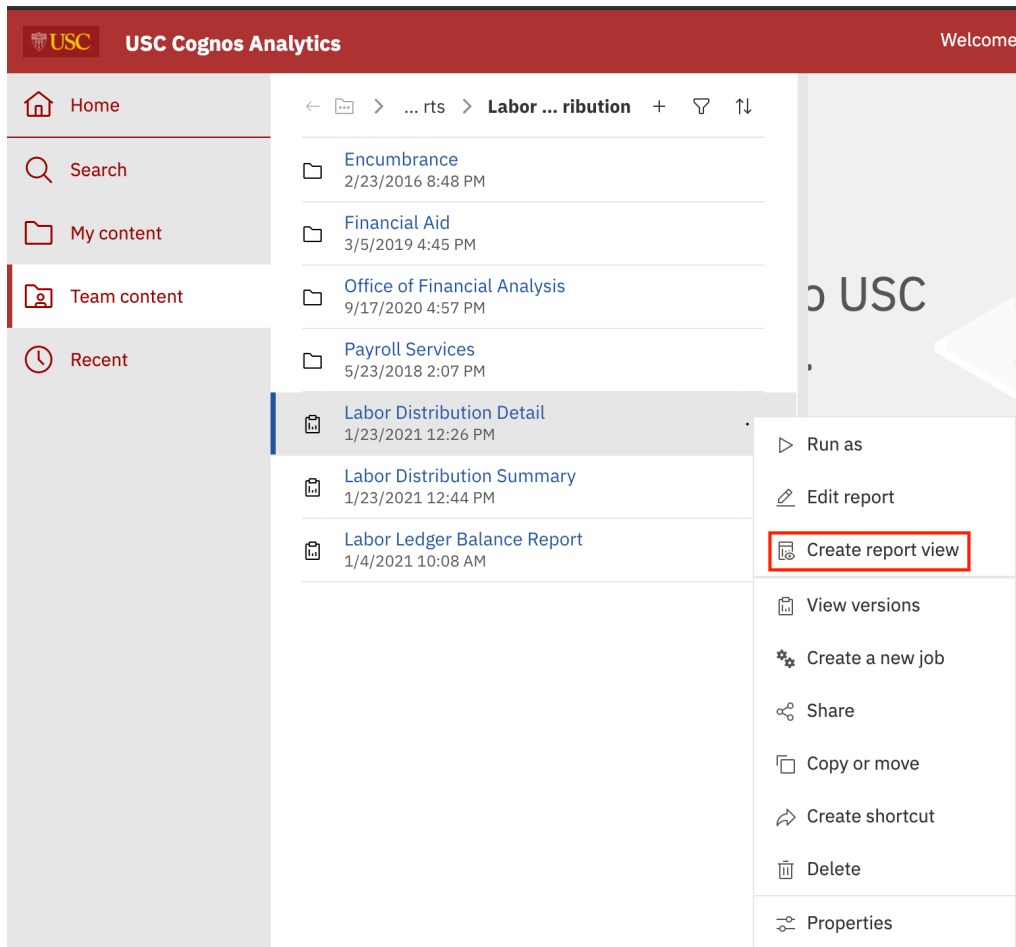
3. If you would like to create a schedule for a report you have directly created skip to step 9
4. If you would like to create a schedule for an ITS Managed Report, you will first need to create a “Report View” of the report you would like to schedule. **Please do not make a “Copy” of the report, the copy of the report will not run.**

Creating a “Report View” of an ITS Managed Report

5. To create a “Report View” of a report you do not own, click the three dots next to the report in the main menu:

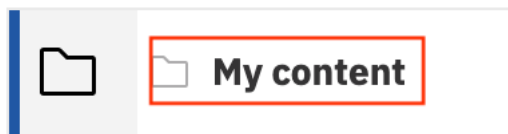


6. From this menu, click “Create report view”.



7. This will open a pop-up that will let you save the report view and name it whatever you like. Please make sure you save this report view under “My content” so it is accessible only to you:

Save as



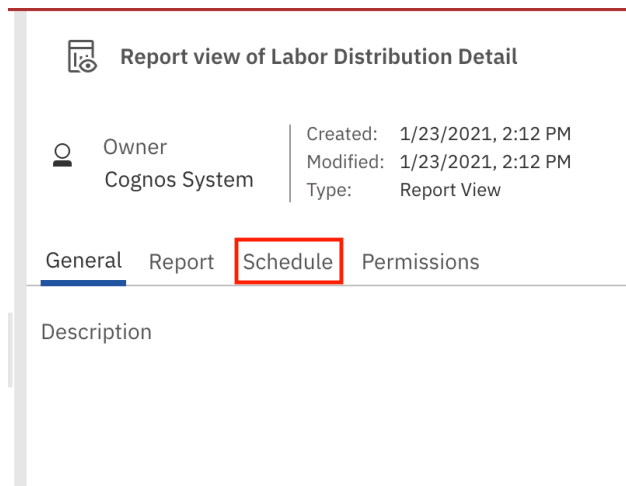
8. Once you have this “Report View”, navigate to this entry in “My Content”.

Opening Report Properties

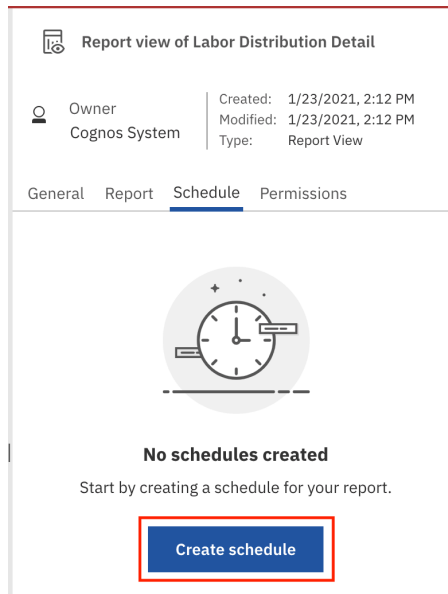
- Click the three dots next to either the “Report View” of the managed report you’d like to schedule, or the report you created yourself that you’d like to schedule, and select “Properties”:



- This will open a “Properties” shelf that should have a “Schedule” tab. Please click the schedule tab:

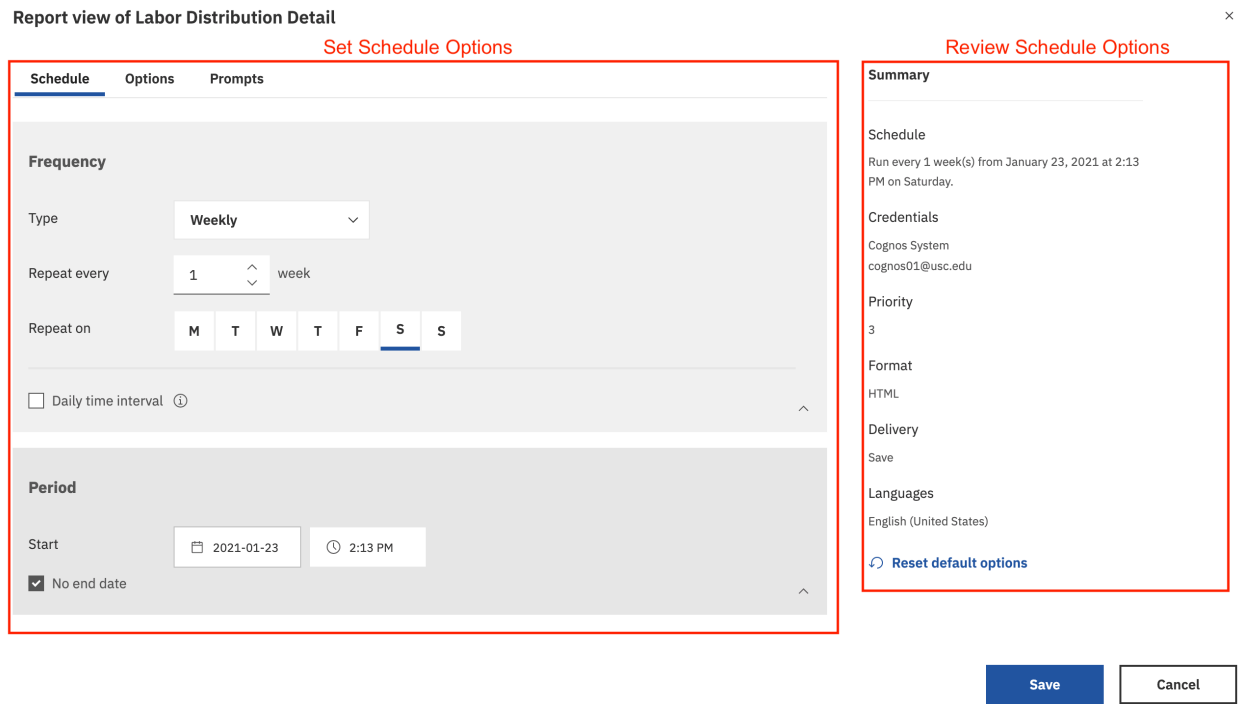


11. The screen below should populate. Please select “Create Schedule”:



Creating the Schedule

12. This will open the scheduling pop-up. The left side of the screen is where you will set your schedule options. The right side will provide a summary of the settings you have put in place:



13. The “Frequency” section under the “Schedule” allows you to select when the report will run, and how often:

Frequency

Type

Repeat every week

Repeat on M T W T F S S

Daily time interval ⓘ

14. The “Period” section under the “Schedule” allows you to pick the date when the schedule will start, and the time that you would like the report to start generating when it runs each time. You can set an end date, or leave it without one. Please note that the service window for Cognos is 7AM – 11PM , so please schedule your reports during this time.

Period

Start

No end date

15. The “Options” tab (next to the “Schedule” tab) is where you will be able to select the output type, and the delivery method. The “Format” section allows you to select whatever output type you desire:

Format

HTML PDF Excel

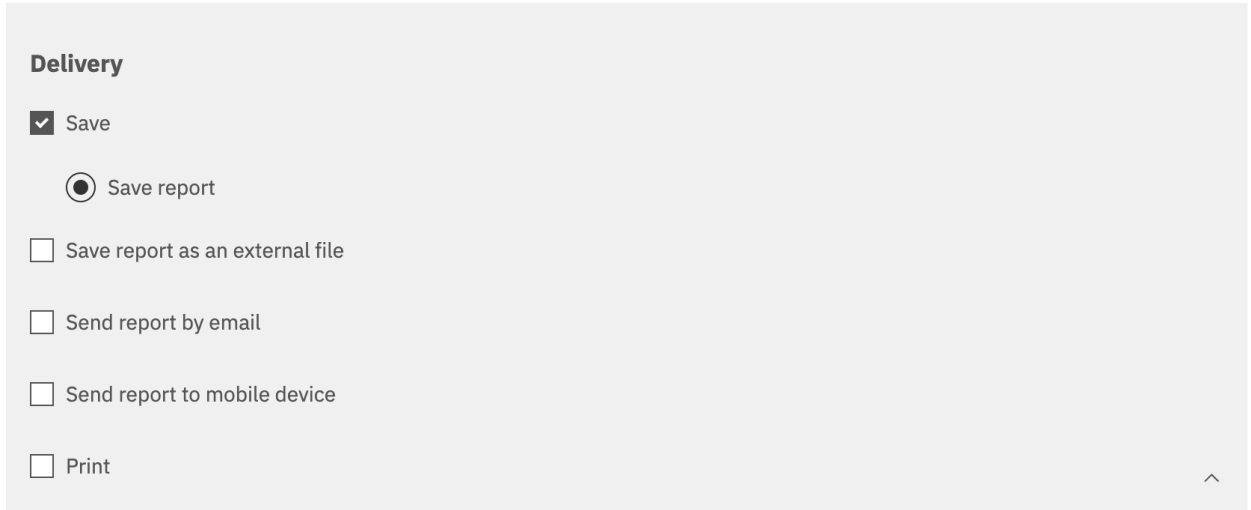
[Edit options](#)

Excel Data CSV XML

Accessibility

Enable accessibility support

16. The “Delivery” section lists your report delivery options:

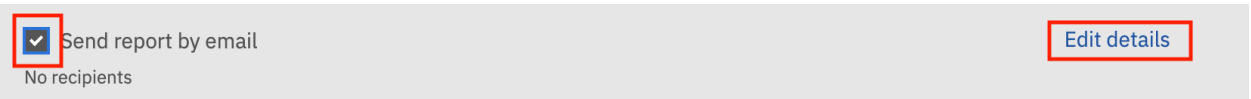


Delivery

- Save
- Save report
- Save report as an external file
- Send report by email
- Send report to mobile device
- Print

^

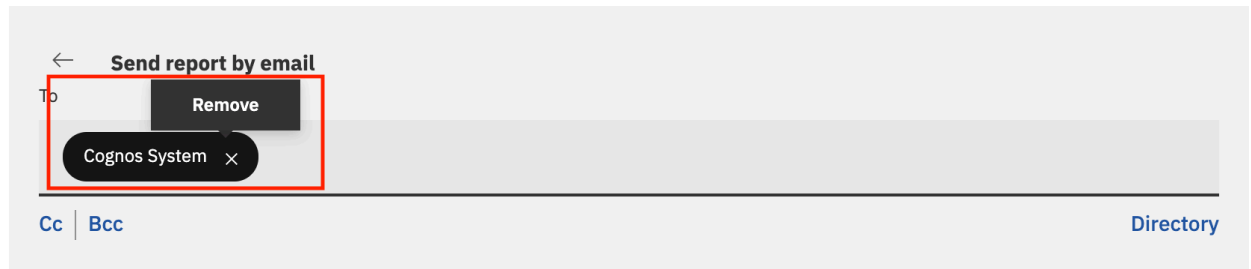
17. If you would like the report emailed to you, check “Send report by email”. This will populate a link called “Edit Details”. Click this link:



Send report by email [Edit details](#)

No recipients

18. To ensure that the report will be emailed to you properly, first remove the auto-generated entry with your name listed:



← **Send report by email**

To

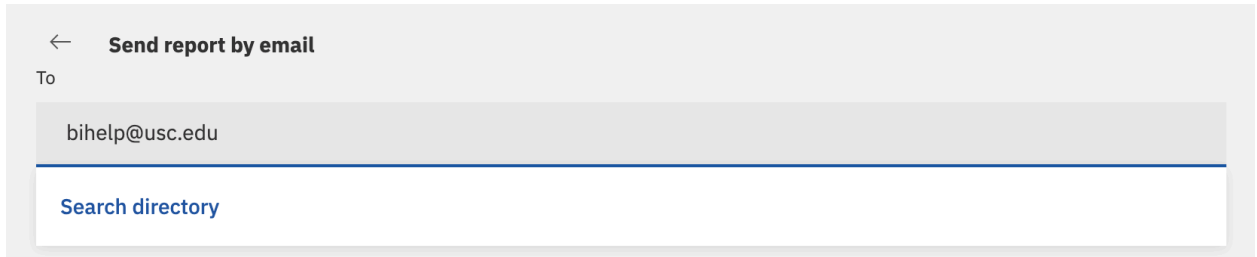
Remove

Cognos System ×

Cc | Bcc Directory

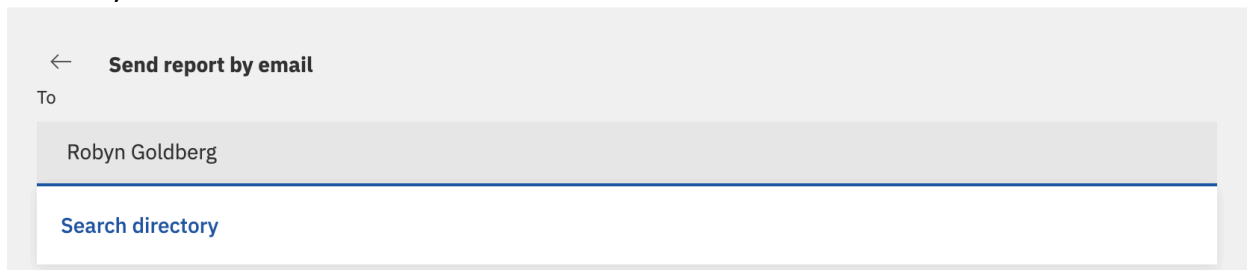
19. Then you can either type the direct emails of the recipients of the report (add your email as well), or search for an individual by name:

Direct email entry:



The screenshot shows the 'Send report by email' interface. At the top, there is a back arrow and the title 'Send report by email'. Below the title is the 'To' field, which contains the email address 'bihelp@usc.edu'. A blue horizontal line separates the 'To' field from a search bar below it. The search bar contains the text 'Search directory'.

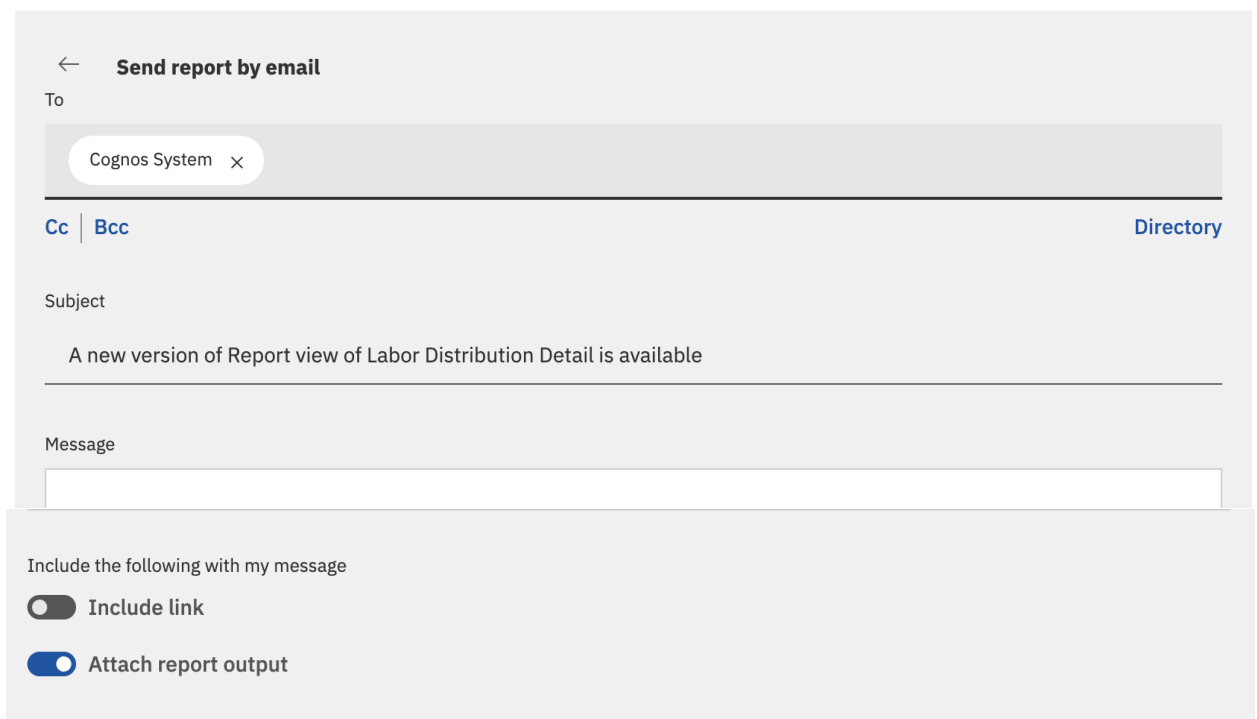
Search by name:



The screenshot shows the 'Send report by email' interface. At the top, there is a back arrow and the title 'Send report by email'. Below the title is the 'To' field, which contains the name 'Robyn Goldberg'. A blue horizontal line separates the 'To' field from a search bar below it. The search bar contains the text 'Search directory'.

Hit enter, and once the address or name is encapsulated in a bubble, your recipient has been added to the schedule.

20. Then you can edit the email content as desired, and select whether you'd like the report attached to the email directly, or if you'd like a link to the report from the email:



The screenshot shows the 'Send report by email' interface. At the top, there is a back arrow and the title 'Send report by email'. Below the title is the 'To' field, which contains a bubble with the text 'Cognos System' and a close button 'x'. Below the 'To' field are the 'Cc' and 'Bcc' fields, with 'Bcc' selected. To the right of the 'Bcc' field is the text 'Directory'. Below the 'Cc' and 'Bcc' fields is the 'Subject' field, which contains the text 'A new version of Report view of Labor Distribution Detail is available'. Below the 'Subject' field is the 'Message' field, which is empty. At the bottom of the interface, there is a section titled 'Include the following with my message' with two toggle switches: 'Include link' (disabled) and 'Attach report output' (enabled).

21. Once you have set everything up, click “Save”. You will now see a summary of the schedule you set under the “Schedule” tab for this report. You can disable this schedule at any time by clicking the blue “Enable” toggle. You can also alter the schedule by clicking “Edit”:

General Report **Schedule** Permissions

Enable [Edit](#) [Delete](#)

Summary

Run every 1 week(s) from January 23, 2021 at 2:13 PM on Saturday.