Introduction
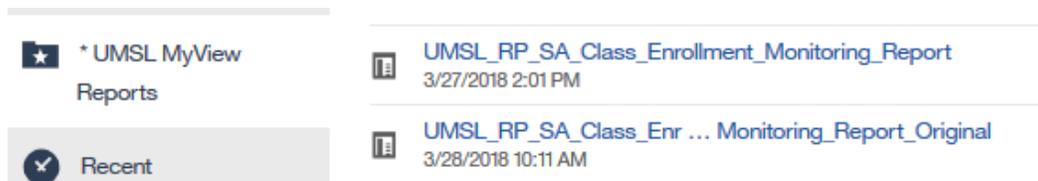
For reports you use on a regular basis, you may want to schedule them to run at specified times.

Process
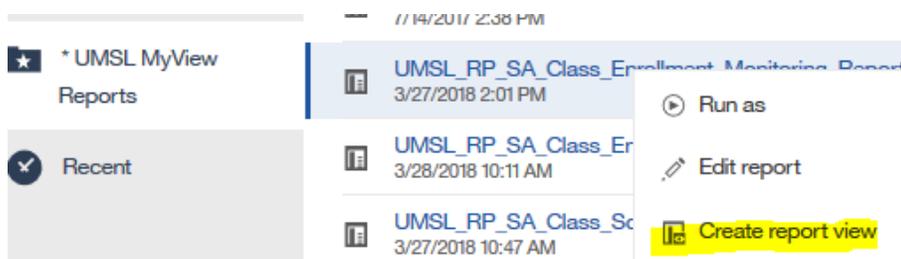
1. Sign in to Cognos, https://reports.umsystem.edu, enter your credentials as um-ad*SSOid* and password, then click the Log in button.
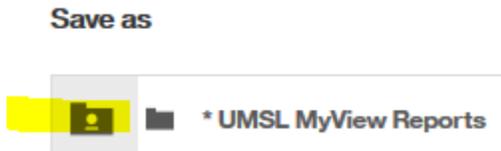

2. Locate the report by clicking * UMSL MyView Reports and scrolling through the list, e.g.,

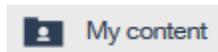3. Right click on the report link and click on Create report view

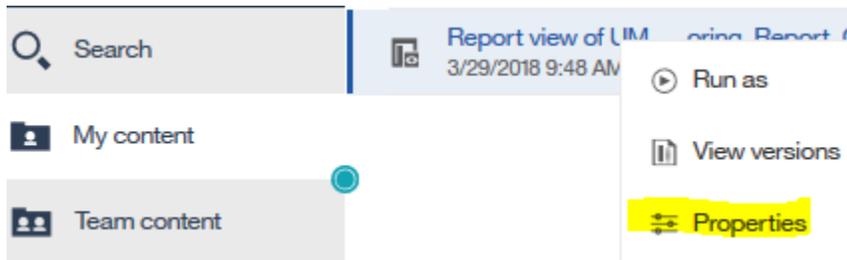4. In the Save as dialog box, click the My content icon (highlighted below).

Save as

* UMSL MyView Reports

5. Click the Save button.

Save

6. On the navigation bar, click My content

My content

7. Right click on the report view link and select Properties.

8. Then click on Schedule and New

9. The following dialog box will appear:

10. Set up the schedule by:
    a. Choose the run frequency (Daily, Weekly, Monthly, Annually, By trigger) by making a selection from the Schedule dropdown box.
    b. Select the desired start date and run time in the Period block. Check the "No end date" box if you do not want to stop on a specific date.
    c. Depending on the frequency selected, the information requested in the "Period" block will change.
    d. Choose the output format by clicking on the ">" on the Format line.

e. If you want the output to be in Excel, click the Excel check box and uncheck HTML. Please DO NOT use Excel Data since data from embedded reports will not be retrieved.

f. Next, set the delivery method by clicking the ">" on the Delivery line.

g. Click the checkboxes next to "Send report by email" and "Attach the report". Next uncheck the boxes next to "Include a link to the report" and "Save report".

h. To add others to the list, click after your name in the "To:" section (highlighted in yellow) and enter the email address(es).
i. Click the Done button.

11. Set the prompt values for the report by clicking on the ">" on the Prompts line. Next click on the Set link to specify the values for the report.

12. The selection criteria page for the report will appear. Select the desired values and click the Finish button. The selected values will be displayed.

13. Finally, click the Create button at the bottom of the Create schedule.

14. You will see a summary of the schedule.

15. Sign out by clicking the "head" button and select Sign out.