

## Introduction

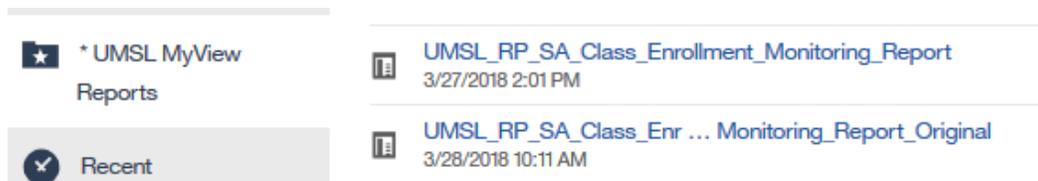
For reports you use on a regular basis, you may want to schedule them to run at specified times.

## Process

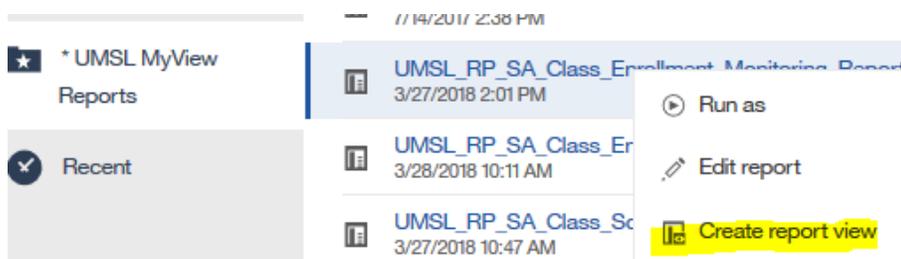
1. Sign in to Cognos, <https://reports.umsystem.edu>, enter your credentials as `um-ad\SSOid` and password, then click the Log in button.

**Attention:**  
Login with your Active Directory login  
`domain\username`.  
(Example: `UMKC-Users\username`)

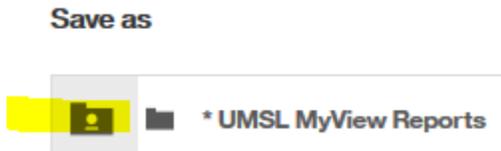
2. Locate the report by clicking \* UMSL MyView Reports and scrolling through the list, e.g.,



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



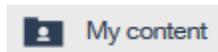
4. In the Save as dialog box, click the My content icon (highlighted below).



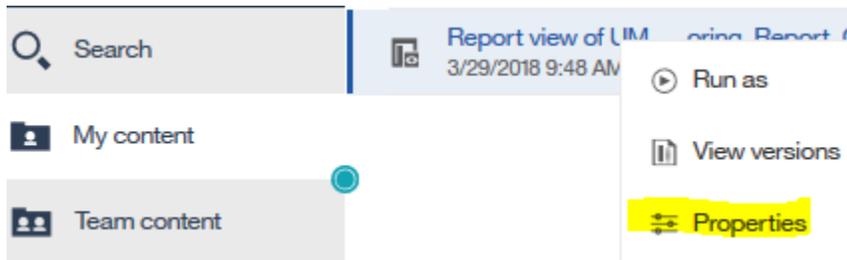
5. Click the Save button.



6. On the navigation bar, click 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:

The image displays two versions of a 'Create schedule' dialog box. The left version is for a 'Weekly' schedule, and the right version is for a 'Daily' schedule. Both versions include the following fields and options:

- Schedule:** Weekly (left) / Daily (right)
- Period:**
  - Start:** 2018-03-29, 10:31 AM (left) / 2018-03-29, 10:32 AM (right)
  - End:** 2018-06-29, 10:31 AM (left) / 2018-06-29, 10:32 AM (right)
  - No end date
- Run every:** 1 week(s) (left) / 1 Day(s) (right)
- On day(s):** M T W T F S S (left, with 'T' selected) /  Daily time interval (right)
- Options:**
  - Format:** HTML
  - Delivery:** Save
  - Prompts:** Set values
  - Languages:** English (United States)
  - PDF:** Select
- Buttons:** Create, Cancel

10. Set up the schedule by:

- Choose the run frequency (Daily, Weekly, Monthly, Annually, By trigger) by making a selection from the Schedule dropdown box.
- 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.
- Depending on the frequency selected, the information requested in the "Period" block will change.
- Choose the output format by clicking on the ">" on the Format line.

The screenshot displays a two-pane interface for creating a schedule. The left pane, titled "Create schedule", includes a "Schedule" dropdown set to "Monthly", a "Period" section with "Start" (2018-03-29 10:37 AM) and "End" (2018-06-29 10:37 AM) fields, a checked "No end date" option, "Run on" set to "the first" of "Monday", and "of every" set to "1 Month(s)". There is also a "Daily time interval" checkbox. The "Options" section shows "Format" set to "HTML" with a red circle around the ">" button. The right pane, titled "Format", lists output formats: HTML (checked), PDF, Excel, Excel Data, CSV, and XML (all unchecked). A "Done" button is at the bottom right.

- 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.

The image shows two side-by-side screenshots of a web interface. The left screenshot is titled 'Create schedule' and contains the following elements: a '< Back' link, a 'Schedule' dropdown menu set to 'Weekly', a 'Period' section with 'Start' (2018-03-29 10:46 AM) and 'End' (2018-06-29 10:46 AM) fields, a 'No end date' checkbox, a 'Run every' field set to '1 week(s)', and 'On day(s)' buttons for M, T, W, T, F, S, S (with 'T' highlighted). Below this is a 'Daily time interval' checkbox. The 'Options' section includes a 'Format' dropdown set to 'HTML' and a 'Delivery' section with a 'Save' button and a red-outlined '>' arrow. The right screenshot is titled 'Delivery' and contains: 'Send report by email' (checkbox), 'Print report' (checkbox), 'Save report' (checkbox checked), and a blue 'Done' button.

- 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".

The screenshot shows a mobile interface for configuring report delivery. At the top, the title is "Delivery". Below it, there are two checked options: "Send report by email" and "Attach the report", both with checkboxes circled in red. The "To:" field contains "Westermeyer, Lawrence W." and a yellow highlighted area. The "Subject:" field contains "A new version of Report view of UMSL\_FP\_SA\_C". Below the subject field are "cc:" and "bcc:" fields. At the bottom, there are three unchecked options: "Include a link to the report", "Print report", and "Save report", all with checkboxes circled in red. A blue "Done" button is at the bottom right.

- 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.

< Back **Create schedule**

Schedule Daily

**Period**

Start 2018-03-29 11:10 AM

No end date

Every 1 Day(s)

Daily time interval

**Options**

Format Excel

Delivery Email

Prompts Set values >

Current values Set Clear



You currently have no prompt values set

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.

The screenshot shows a web form titled "Current values" with "Set" and "Clear" buttons. The form contains several input fields, some of which are populated with text. The fields and their values are as follows:

Field Name	Value
Term	FS2018
Session	
Subject	
Campus	
AcadGroup	College of Business Adminstrtn
WaitTotal	0
Location	
Career	
Component	

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

14. You will see a summary of the schedule.

 Report view of U ... ing\_Report\_Original

	Owner Westermeye ... W.	Created: 3/29/2018 9:48 AM
		Modified: 3/29/2018 9:48 AM
		Type: Report View

General Report **Schedule** Permissions

Enable  Delete

Weekly - Every Thurs at 10:46 AM

Excel

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