Cognos Scheduling (focused on Current Year Budget Balance Available Report)
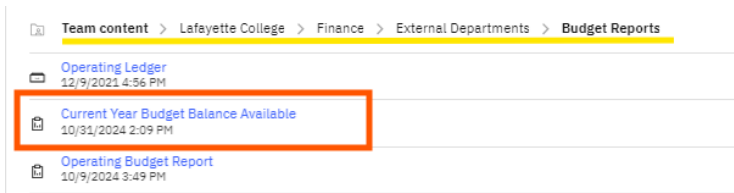
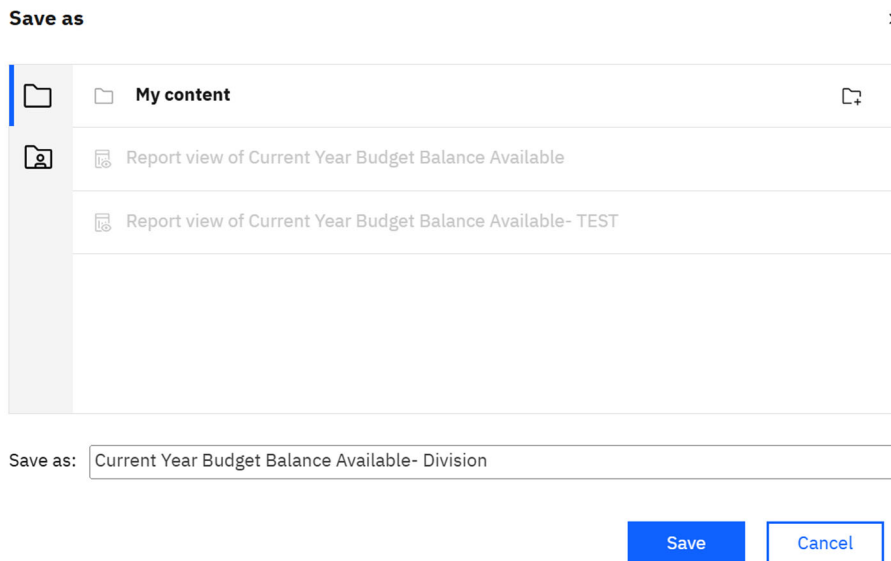**Cognos Link: https://reporting.lafayette.edu/bi/?perspective=home**
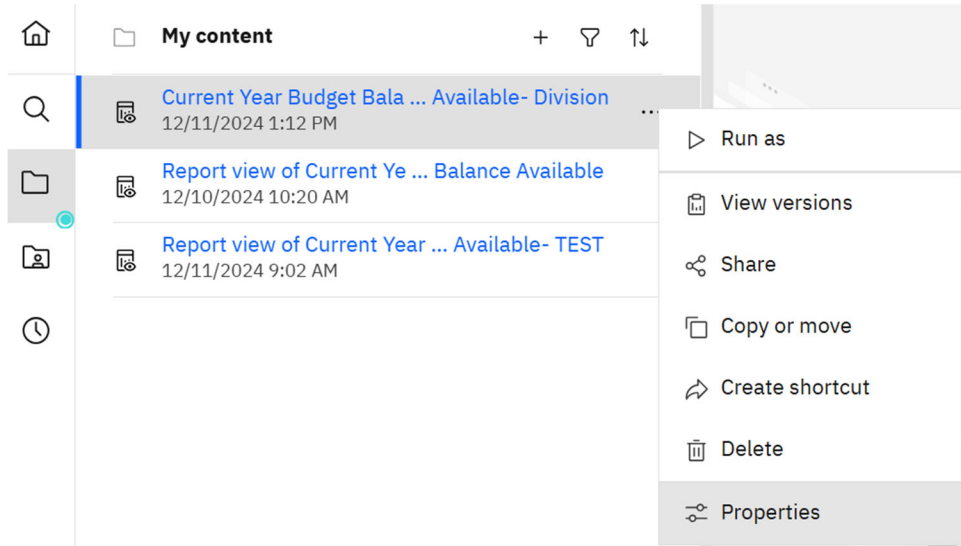

Cognos File Path:

1. Click the "…" on the right side and select "Create Report View"

.
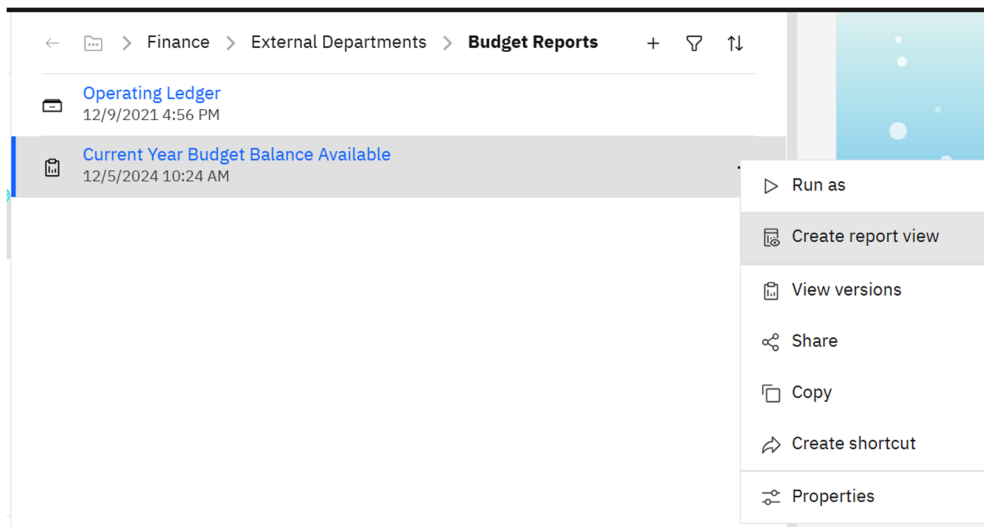
2. Select the top folder labeled "My Content" and title the report in the "Save As" textbox. Click Save.

3. The Cognos Landing page will appear. Navigate to "My Content" and the report recently saved will now be shown under "My Content". Hold cursor over the report and select the "…" and select "Properties".

4. Four options will show. Select "Schedule" and then select "Create schedule" (blue box).
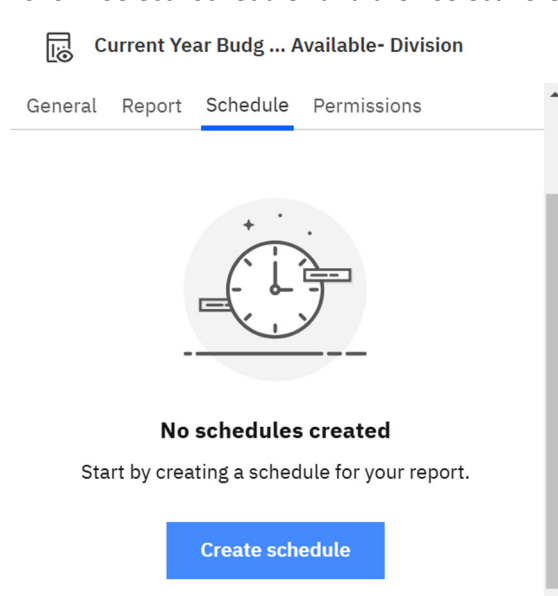
5. First tab is "Schedule" – how often the report will generate and on what day(s)

Current Year Budget Balance Available- Division

Schedule   Options   Prompts

Frequency

Type	Weekly
Repeat every	1 week
Repeat on	M T **W** T F S S

☐ Daily time interval ⓘ

Period

Start   📅 2024-12-11   🕐 1:16 PM

☑ No end date

6. Second tab is "Options" – Deselect "HTML" and select "Excel" under Format and "Send report by email" under Delivery. Select "Edit Details" in the bottom right corner to confirm username is correct in the "to" line.

Current Year Budget Balance Available- Division

Schedule   Options   Prompts

🔍 Find

Format

🔘 Use default format

| ☐ HTML | ☐ PDF | ☑ Excel |
| ☐ Excel Data | ☐ CSV | ☐ XML |

Accessibility

☐ Enable accessibility support   ⌃

Delivery

☑ Save

    ◉ Save report

☑ Send report by email   Edit details

                               Edit email options

7. Third tab is "Prompts" – select "Set values" (blue box) and the Cognos Criteria screen will generate. Follow steps identified under "Cognos Criteria" and click Next and Finish. A screen will generate showing the Parameters selected. Click Save.

**Current Year Budget Balance Available- Division**

Schedule   Options   Prompts

You currently have no prompt values

Set values

The report will now be delivered to your inbox as frequently as requested with the parameters selected!

Other information/tips:

1. This message may appear at any point in time. Click "renew" and credentials will reset.

   ·T ⚠ Your credentials are required to complete this operation.   Renew
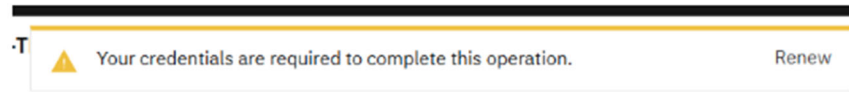
2. Multiple reports can be scheduled under one user- for example, a weekly report showing orgs without accounts detail (hide accounts options) and a monthly report showing orgs with accounts detail (show accounts options).

3. This message may appear after the report is scheduled. Please disregard.

   Welcome ⌄

   ❗ Unable to load requested view.   ✕