# Setting up Subscriptions and Schedules in Cognos
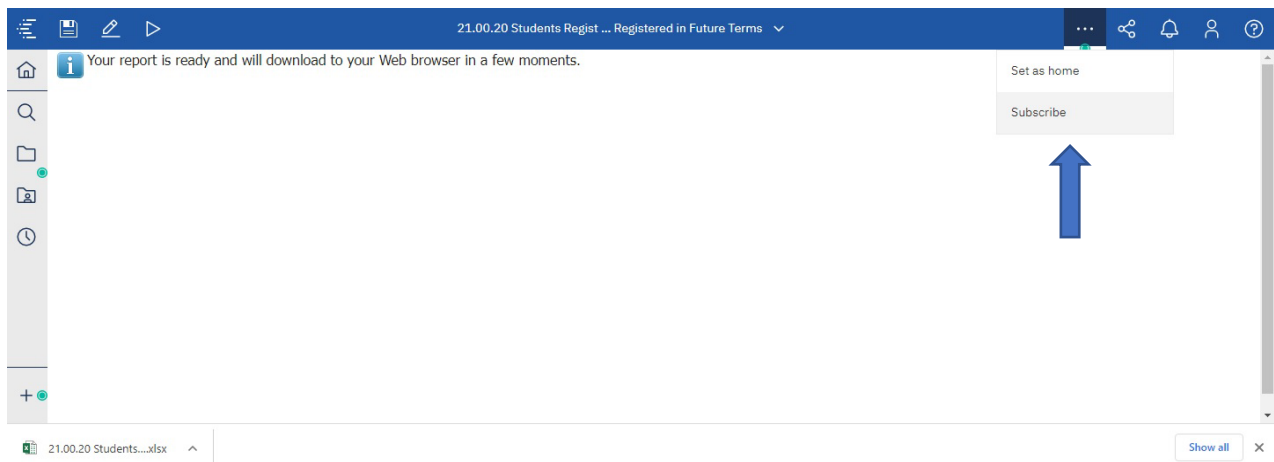
## 1. Definitions

**Subscription**

Process that allows user to schedule a report in Team Content. The subscription can be saved or emailed to the user (cannot handle multiple emails).

**Schedule**

Process that allows user to schedule a report in My Content. The scheduled report can be emailed to multiple people or saved.

## 2. Creating a Subscription

- Select the report, click on it to run, on prompt page select all prompts, select Finish to run it
- While running (or when done) click on 3 dots top right and select Subscribe
- *Example shown is 21.00.20 Students Registered in Prior Terms Not Registered in Future Terms.*

## Subscribe

**When do you want to receive this report?**

| Repeat on | M | T | W | T | F | S | S |
|-----------|---|---|---|---|---|---|---|

| Time | 🕐 9:55 AM |
|------|-----------|

| Format | HTM HTML › |
|--------|-----------|

| Delivery | 💾 Save › |
|----------|---------|

| Prompts | 13 schedule prompt values › |
|---------|------------------------------|

**Create**    **Cancel**

Select the days and time you want to schedule the report

Select the format of the report

Click on the Delivery option to change it to Email (See next form)

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‹ Back          **Delivery**

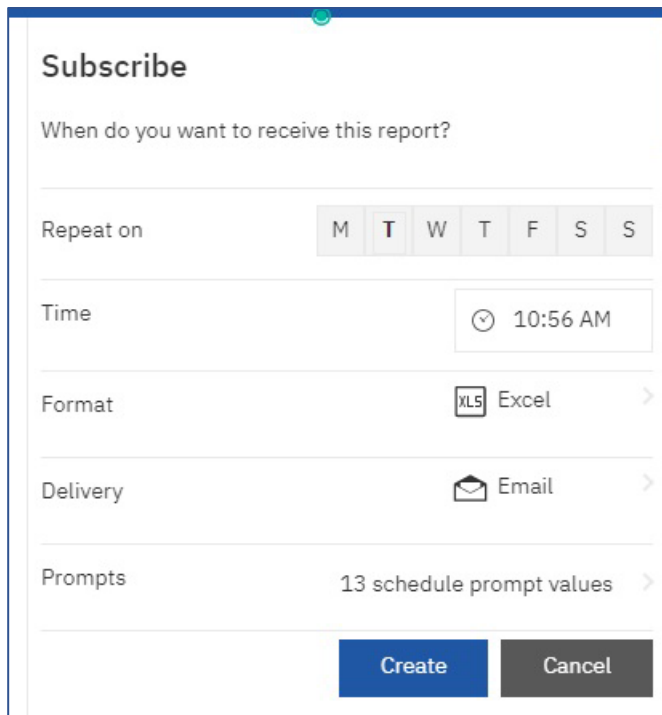| ✉ Send report by email | ☑ |
|------------------------|---|
| Attach the report | ☑ |
| Include a link to the report | ☐ |
| 🖶 Print report | ☐ |
| 📄 Save to cloud | ☐ |
| 💾 Save report | ☐ |

**Done**

CLICK ON: 'Send report by email' and 'Attach the report'

CLICK OFF: 'Include a link to the report'

Can keep 'Save report' if you want versions saved in 'My content'

Select 'Done' to return to Subscribe menu

Your final results should look something like this (prompts will vary depending on report).

Click Create and Subscription has been created and will run according to the schedule you set.

When the subscription runs, you will get a notification (see bell icon on top blue bar)

**Ways you can view your results:**
- 'Notifications' (the bell icon on top blue bar)
  - Click on the notification and the report link will be available
- Find your report (will have 'My' at beginning of title) in My Content/Subscriptions
  - Click on report to open most recent version
  - Click on More/View Versions – select version you want to view
    - You can save multiple versions of the report by selecting More/Properties/Report/Advanced: Report output versions - type the number of versions you want to save (over the number 1)
- Go to your Personal Menu (head icon on top blue bar)/My Schedules and Subscriptions (this is where all schedules and subscriptions are listed)
  - Find the report/Select More/View Versions

**Ways you can modify your subscription:**
- My Content/Subscriptions/report name – Click on More/Properties/Schedule and then Edit
- Personal Menu/My Schedules and Subscriptions/report name – Click on More/Modify this subscription and then Edit

### 3. Creating a Schedule:

- Find the report you want to schedule, select More (the 3 dots to the right of title), select Create Report View.
- <u>Save the Report view in My Content</u> (the folder with no head).
- You can rename the report or keep the default name of 'Report view of ....'.
- *Example based on report 21.00.30 Students Who Changed Their Program of Study*

Find the new Report view in My content, select More (the 3 dots to the right of title), and select Properties.

Select 'Schedule'

**Report view of 21.0 ... Program of Study**

Owner
Testuser Cognos

Created: 3/22/2022, 11:43 AM
Modified: 3/22/2022, 11:43 AM
Type: Report View

General    Report    **Schedule**    Permissions

**No schedules created**

Start by creating a schedule for your report.

**Create schedule**

Select 'Create schedule'

Set up Frequency and Period

Then select Options

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**Report view of 21.00.30 Students Who Changed Their Program of Study**

**Schedule**    Options    Prompts

**Frequency**

Type                Weekly

Repeat every        1        week

Repeat on      M    T    W    T    F    S    S

☐ Daily time interval  ⓘ

**Period**

Start          📅 2022-03-22        🕐 11:55 AM
☑ No end date

**Advanced**

**Summary**

Schedule
Run every 1 week(s) from March 22, 2022 at 11:55 AM on Tuesday.

Credentials
Testuser Cognos

Priority
3

Format
Excel

Delivery
Save

Languages
English (United States)

↻ Reset default options

**Save**    Cancel

**Options:**

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

**Accessibility**

☐ Enable accessibility support

Change the format if you wish.

**Delivery**

☑ Save

   ◉ Save report

☐ Save report as an external file

☐ Send report by email

☐ Send report to mobile device

☐ Print

**Select Delivery Options**

You can save the report since you are in My Folders and it is a Report View.

You can also send report by email to multiple addresses.

If you select Email then you must go into 'Edit details' and add the email addresses and click on 'Attach report output' so the report is included in the email. If you attach the report you don't need the Include Link option.

After you have finished the email options, select Prompts. And Click on 'Set Values'. This will bring up the prompt page for your report. Select all prompts and 'Finish'. This will bring you back to your Schedule page with a summary of the prompts you selected.

## Summary

**Schedule**

Run every 1 week(s) from April 8, 2022 at 10:17 AM
on Tuesday, Friday.

**Credentials**

Testuser Cognos

**Priority**

3

**Format**

Excel

**Delivery**

Save, Email

**Languages**

English (United States)

**Number of prompts**

7

↻ Reset default options

[ Save ] [ Cancel ]

Review the Summary side panel to make sure all your selections are listed
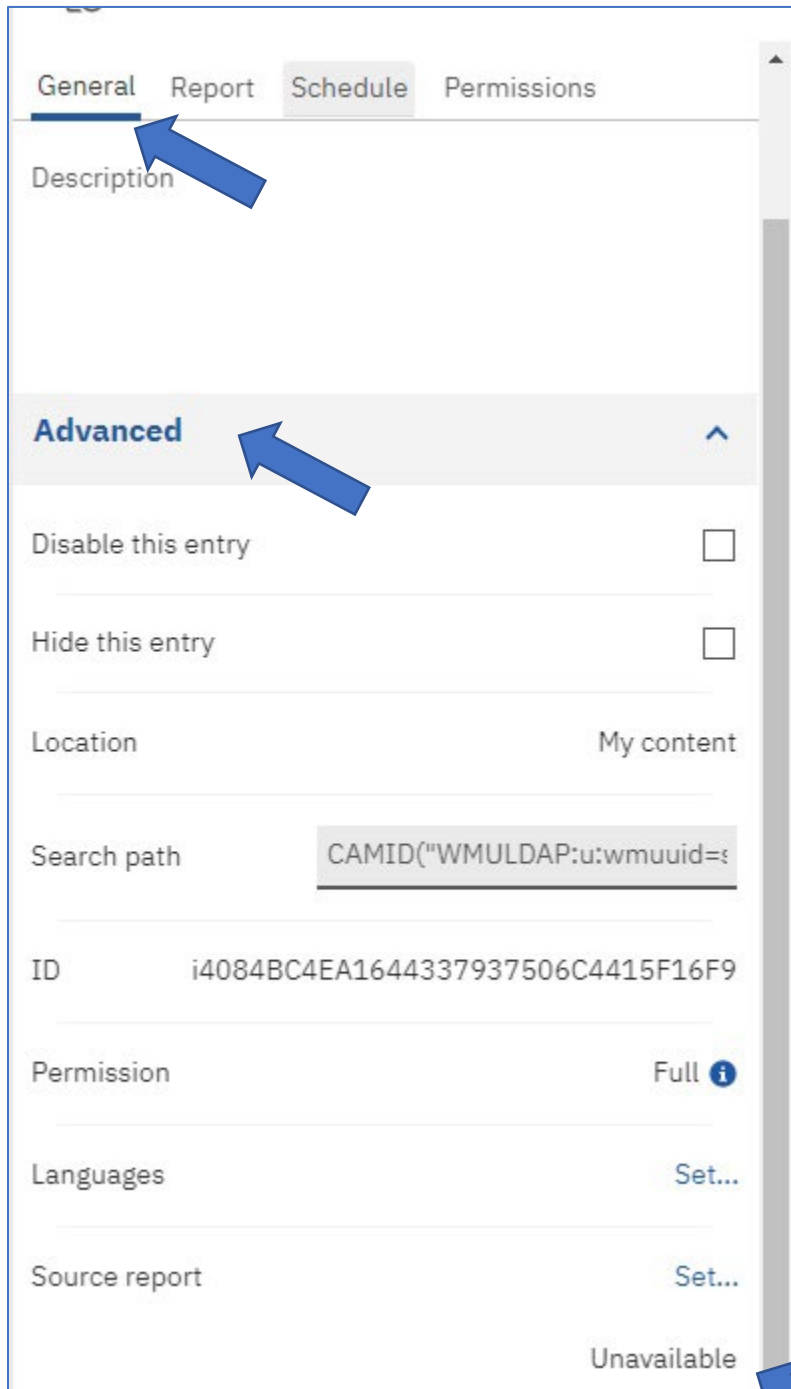
Click on 'Save' when all done.

You can save multiple versions of the report by selecting More/Properties/Report/Advanced: Report output versions - type the number of versions you want to save (over the number 1)

**To view the schedule or make changes to it:**
- My Content/ report name – Click on More/Properties/Schedule and then Edit
- Personal Menu/My Schedules and Subscriptions/report name – Click on More/Modify this schedule and then Edit

4. **Reconnecting Report**

If your schedule or subscription does not run as planned, first check to make sure the report is still connected to the linked report. There may be times when your Report View or Subscription report loses its connection to the original report. When that happens, the schedule may not run or when you look at the report in 'My content' it is grayed out.



You can reconnect to the original report by:

Select the 3 dots (More)

Select Properties

Select General tab

Click on Advanced

At the bottom is 'Source report'. If it says Unavailable then you need to reset it. Click on 'Set', go to 'Team content' and find the report. Click on the report and the connection will return.