



## Scheduling a Business Report

---

### Logon Process

1. In the URL address bar type [cognos-p.nmsu.edu](http://cognos-p.nmsu.edu)
2. Log on using your my.NMSU **User Name** and **Password**.
3. Several tabs may be available across top of page based on your security access.
4. Select tab **Administration and Finance**.
5. Select subtab **Administrative**.

### Saving a Report to My Folders

In order to schedule a report, a report version is saved under My Folders. Follow the steps below for the process. Example used is for scheduling *FI-Budget Status Detail and Summary (Non-sponsored awards)*.

1. Locate the **Finance** portlet.
2. Click on the maximize  icon to maximize the portlet.
3. Locate the report. Go across the row and under the **Actions** menu click **More...**
4. Click **Copy...**
5. You can rename the report to help identify it.
6. Location should be pointing to **My Folders** if not, click on the **Select My Folders** (this will point to the folder to save the report).
7. Click on the **OK** button.
8. To minimize the portlet, click on the Restore  icon.

### Report Format Options

By default most of the reports are in an HTML format but there are other format options available when running a report. Determine the desired format prior to scheduling a report.

**Note:** For reconciliation purposes, the PDF format is best.

- PDF – best used to print the report.
- Excel 2007 Data – best used to manipulate the report data.
- Excel 2007 Format – best used for a report format.
- Excel 2002 Format – best used to manipulate the report data.
- CSV Format – delimited text – best used to manipulate the report data or import to another application.

## Setting the Parameters to schedule a report.

1. Click on the **My Folders** tab.
2. Locate the report. Go across the row and under the **Actions** menu click on the **Schedule**  icon.
3. With the schedule option view displayed, set the criteria for running the report.
  - a. Select the desired *Frequency*
  - b. Select a start date.
  - c. Select an end date if applicable (recommend that an end date is entered).
  - d. Set time to run the report on the set schedule.

Note: recommend that report run time be set between 7:00 and 8:00 a.m. This will help ensure the reports are not running during critical use of Cognos and after nightly updates.
4. Set the *Options*. To override the *default prompt values* click on the **box**.
  - a. Select the desired format output (uncheck the HTML if selecting another format).
5. Delivery (save the report, print, email etc.).
  - a. If sending a link to the report by email
    - i. Place check mark in the box and then click on **Edit the email options...**
    - ii. If sending report to other than self, identify the recipient(s) to email the report.
    - iii. Update the **Subject** line if applicable.
    - iv. Place a message in the body reminding what report you are receiving.

Note: If you do not place a message in the body, the report will be imbedded directly in the email.
    - v. Recommend changing the options and check the box next to **Attach the report**.

Note: If “**Include a link to the report**” is checked, the recipients must have Cognos access to retrieve the report.
    - vi. Click **Ok**.
6. Set the *Prompt Values*. Select to override the *default prompt values* click on the **box**.
  - a. Click on **Set**.
  - b. Prompt page will appear. Select desired prompts.

Note: Additional prompt pages may appear go through all required prompts. When running for future Fiscal Periods, leave the period as the default “Fiscal Period” and it will default to the last closed fiscal period.
  - c. Click on **Finish** button (prompt values are now set).
  - d. Click **Ok** button.

## Managing the report

If a report schedule is no longer needed, it can be deleted. It can also be disabled without losing any of the scheduled details. For example, it can be interrupted or canceled (disabled) and then reinstated (enabled) at a later time.

Interruption can occur in the running of a report when your credentials have been changed; example: your myNMSU password expires. Credentials have to be confirmed. If the scheduled report fails to run or if the report is not received, then refresh your credentials.

1. From the Tool Menu, click **My Area Options**.
2. Select **My Preferences**.
3. Select the **Personal** tab.
4. Click **Renew the Credentials**.
5. Click **OK**.