

Schedule a Report in Cognos Analytics

Business Intelligence

Report Schedules in Cognos Analytics

Report schedules enable a report to be executed automatically, at a later date, and at specific intervals.

Important

The information displayed in a report is determined by the security rights of the user who runs the report. Some users in your organization have security access to all employee data. If a user with full access runs a report and then distributes the report to others, confidential information could be revealed. In this situation, use burst reports to limit the information a report recipient can view.

Report Scheduling Tips

For best results with report schedules, consider these report scheduling tips.

- Schedule the report to run outside of the daily maintenance window: 3 AM to 5 AM Eastern Time in the United States. If a report is scheduled to run during the daily maintenance window, the report will fail when system maintenance is performed.
- Schedule the longest running reports to run outside of normal business hours: for example, 6:00 AM to 9:00 AM, or 6:00 PM to 1:00 AM, except for weekends when maintenance can begin as early as 12:00 AM (midnight).
- Stagger scheduled start times. If all reports are scheduled to execute at the same time, they will not all be immediately processed. As a result, performance can lag.
- Reports should be scheduled no more frequently than every 15 minutes. If a report is scheduled more frequently (for example, every 5 minutes or 10 minutes), Ultimate Software will update or disable the schedule and you will be contacted by your Support representative.

Create or Renew Credentials

Business Intelligence uses saved credentials when running reports that you have scheduled. You must create credentials before scheduling a report for the first time.

1. From the Cognos Analytics application bar, select the Personal icon.



2. From the drop-down list, select My Preferences.
3. Select the Personal tab and then select Advanced.
4. Under Credentials, create or renew your credentials.
 - To create your credentials, select: Create
 - To renew your credentials, select: Renew

Schedule a Report

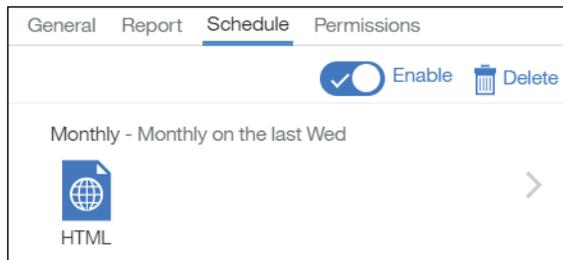
Report scheduling enables you to specify how often a report executes, start/end dates and times, and the report's format and delivery options.

Important

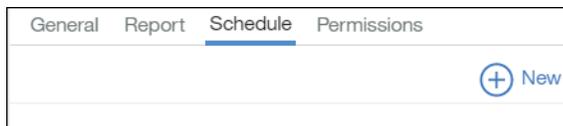
You must create or renew credentials before scheduling a report.

1. Navigate to the location of a report, and select the More icon to the right of the report name.
2. From the drop-down list select Properties, and then select the Schedule tab.

The Properties pane displays current schedule information for the report.



If no schedule is set, a New icon appears.



3. Select New to add a new schedule, or select the right-facing arrow to the right of the current schedule to edit the schedule.

If the New icon or the current schedule arrow is not available, then you have not been granted Write permission for the report. Copy the report to a location where you have Write permission, or contact your Business Intelligence administrator to be granted Write permission.

4. On the Create Schedule page, select how often the report should be executed.

To schedule a quarterly report, select Monthly, and then select a particular day every three months.

5. In the Start and End sections, select dates and times.

You can allow the schedule to continue indefinitely by selecting No End Date.

6. From the Options section, select Format.

- a. Check either the PDF or Excel box.
- b. Uncheck the HTML box.
- c. Select Done.

7. From the Options section, select Delivery.

- a. Check the Send Report by Email box.
- b. Check the Attach the Report box.
- c. In the To: field type a valid e-mail address.

Your e-mail address is automatically added to the To: field . It is recommended that you delete the default e-mail address and instead type e-mail addresses into the field.

E-mails can be sent to non-UltiPro users.

- d. Enter a subject and message, as needed.
- e. Uncheck the Include a Link to the Report box.

Checking the Include a Link to the Report box would allow users to attach a copy of saved report output to the e-mail. Because Ultimate does not permit users to save output to the servers, the link is inoperable.

- f. Uncheck the Save Report box.

Important

Saving report output is a security risk. Business Intelligence security respects only the permissions of the user who runs the report. Therefore, saving a report and then forwarding the report to other recipients can enable those recipients to view confidential information.

- g. Select Done.

8. If the report includes mandatory prompts, set values in the Prompts section.

Important

Most delivered reports include a prompt page that requests input before a report is run. If the report includes mandatory prompts, set the prompt values when scheduling the report. If mandatory prompt values are not configured when the schedule runs the report, the report will not execute. It is a best practice to rewrite reports so they do not contain mandatory prompts.

- a. Select the prompt values.



The Current Values pane appears.

- a. Select Edit, and then on the Prompt page, select values for each prompt as needed.
- b. Select Run Report.

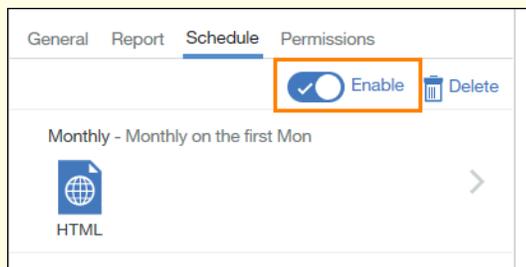
Selected values appear on the Current Values pane.

9. On the Create Schedule page select Create, or on the Update Schedule page select Update to save the schedule.

A schedule is created and the report runs at the next scheduled time.

Note

If you want to create a report schedule but not apply the schedule immediately, uncheck the Enable control. All settings are saved so you can easily enable the report schedule later. To enable the report schedule at a later date, check the Enable control.



10. Select Back to close the schedule page.