



Scheduling a Report

Logon Process

1. In the URL address bar type 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 **Student** tab.

Saving a Report to My Folders

In order to schedule a report, a version needs to be saved under My Folders. There are three (3) ways to save a report: *Copy*, *Report View*, and *Shortcut*. The recommended is the **report view** of a report. This will ensure that you are always running the latest version of report. A *copy* of a report will not have modification updates. A *shortcut* of a report cannot be scheduled.

1. Locate the tab titled **Student**.
2. Expand and locate the folder where the report resides.
Note: The folders are group reports by category.
3. Click on the folder link to expand. A list of reports will be displayed.
4. Click on the maximize  icon to maximize the portlet.
5. Locate the report. Go across the row and under the **Actions** menu click on the **Create a Report View**  icon.
6. You can rename the report to help identify it.
7. Under location, click on the **Select My Folders** (this will point to the folder to save the report).
8. Click on the **Finish** button.
9. 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.

- 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 **My Folders**.
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 6:30 and 7:30 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. Identify the recipient(s) to email the report.
 - i. Update the Subject line if applicable.
 - ii. Place a message in the body reminding what report you are receiving.
 - iii. Recommend changing the options to **Attach the report**.
Note: If “Include a link to the report” the recipients must have Cognos access to retrieve the report.
 - iv. 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.
 - c. Click on **Finish** (prompt values are now set).
 - d. Click **Ok**.

Managing the report

If 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 cancel (disabled) and then decide to run (enable) the schedule 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**.