How to Schedule Cognos Reports for Recurring Delivery

ASRSP 9/24/2019

- Sponsor Programs reports can first be found in Cognos under the Team Content icon on the left-hand menu, then the Finance Facilities and Research Administration folder, School folder, and Sponsored Programs Management folder.

- In order to schedule Cognos reports for recurring delivery, Cognos users must first copy the reports from Team Content to their individual My Content folders. Individuals can schedule for distribution to multiple email addresses, which will be described below.

- Find the desired report, select the three horizontal dots indication “More” and select “Copy or move” from the pop-up menu.
- Click on the Destination folder to activate the Copy to Button

- My Content is already selected, Click the Copy to button
**Scheduling**: On the newly copied My Content report select the three horizontal dots indicating “More” and select “Properties” from the pop-up menu.

You will now see that you are the owner of this copied report. Click on Schedule then select the New plus to reveal the “Create Schedule” menu.
Here there are many options to set up the schedule. For the GM097 you may wish to continue a Monthly delivery. Select Monthly for Schedule. The report start date can be edited for the first delivery. The following example if for delivery on the 10th of each month.

- On the Format menu deselect HTML and select Excel.

- Select Excel for the Format.
• Next, Click the Arrow next to save in Delivery option. This is for setting up recipients and the email message.
• Select “Send report by email” to view the full Email Delivery menu.

* Select the “Attach the report” button.
• Email recipients can be added by entering their email address (use full addresses – NetIDs appear not to work.)
• An email message can be added in the box.
• The subject of the email can be edited as well.
• Unselect “Include a link to the report.” Click Done.
Now set up the report parameters. Select Set values in the Prompts, then click Set for Current values.
• This is where the report is set up as if running it as normal.
• ASRSP recommends the following parameters:
  o Current Period
  o Department Search & Select: Inserting all appropriate DeptIDs
  o Manager/Reviewer: no selection needed
  o ACTIVE (or ACTIVE and PENDING) Contract Status
  o Fund: no selection needed – all sponsored project funds automatically included
  o GCFA: no selection needed
  o Active Projects Only
• Click Finish and it will take you back.
- Once prompts are set they are displayed

<table>
<thead>
<tr>
<th>Current values</th>
<th>Set</th>
<th>Clear</th>
</tr>
</thead>
<tbody>
<tr>
<td>DeptTree</td>
<td>All Departments, Northwestern University</td>
<td></td>
</tr>
<tr>
<td>ProjectPI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Status</td>
<td>ACTIVE</td>
<td></td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>-1</td>
<td></td>
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<tr>
<td>ProjectStatus</td>
<td>Active Projects Only</td>
<td></td>
</tr>
<tr>
<td>RadioPrmpt</td>
<td>Department Search &amp; Select</td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td>610 - Federal Grant ... Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Accounting Period</td>
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<td></td>
</tr>
<tr>
<td>Department</td>
<td>5256000 - Psychiatry</td>
<td></td>
</tr>
<tr>
<td>Date_Opt</td>
<td>Previous Period</td>
<td></td>
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<tr>
<td>Manager\Reviewer</td>
<td></td>
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<tr>
<td>GCFA</td>
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• Click Create in the window.

• The above procedure will ensure that an updated GM097 is sent by Cognos to the recipients’ email boxes on a user-specified recurring schedule.