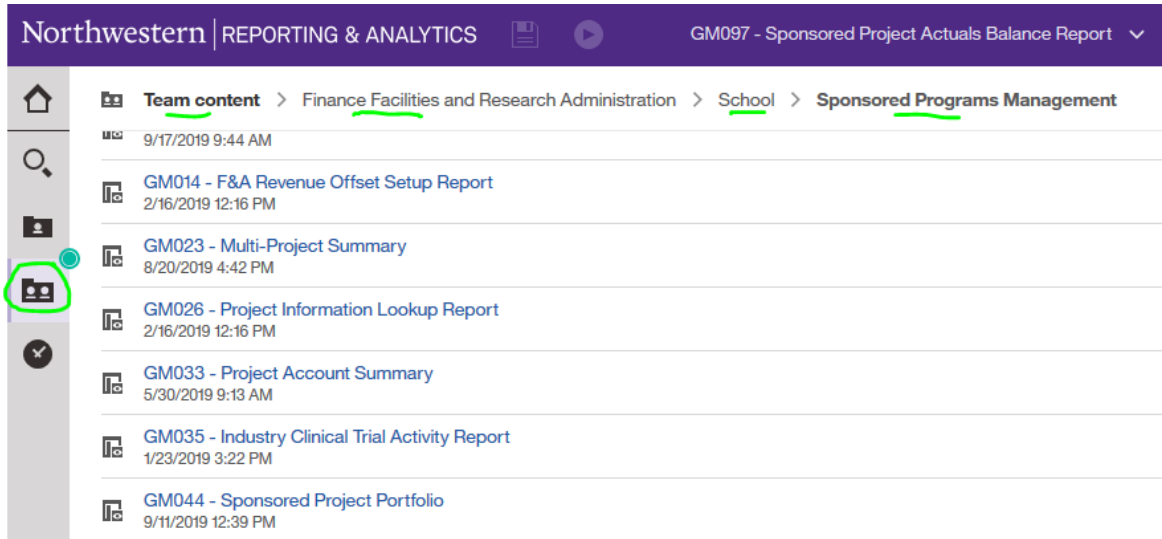


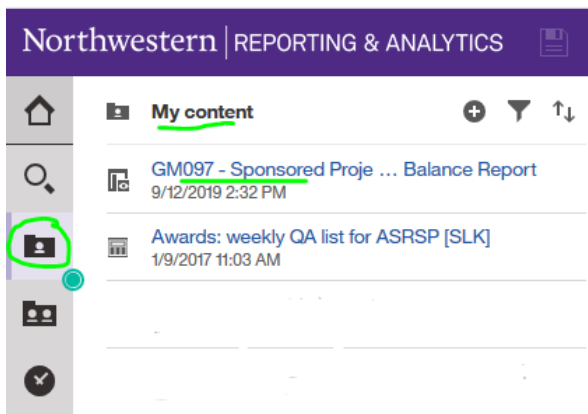
How to Schedule Cognos Reports for Recurring Delivery

ASRSP 9/24/2019

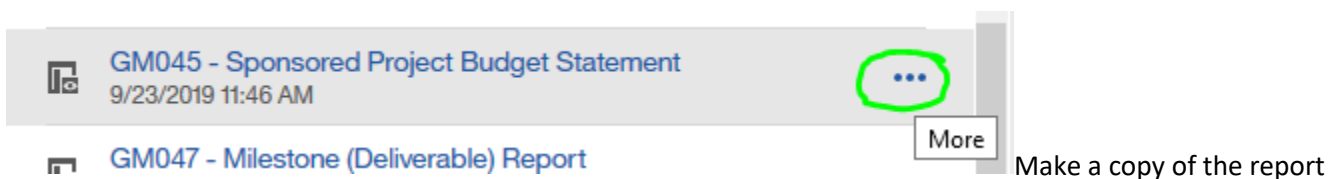
- Sponsor Programs reports can first be found in Cognos under the Team Content icon on the left-hand menu, then the Finance Facilities and Research Administration folder, School folder, and Sponsored Programs Management folder.

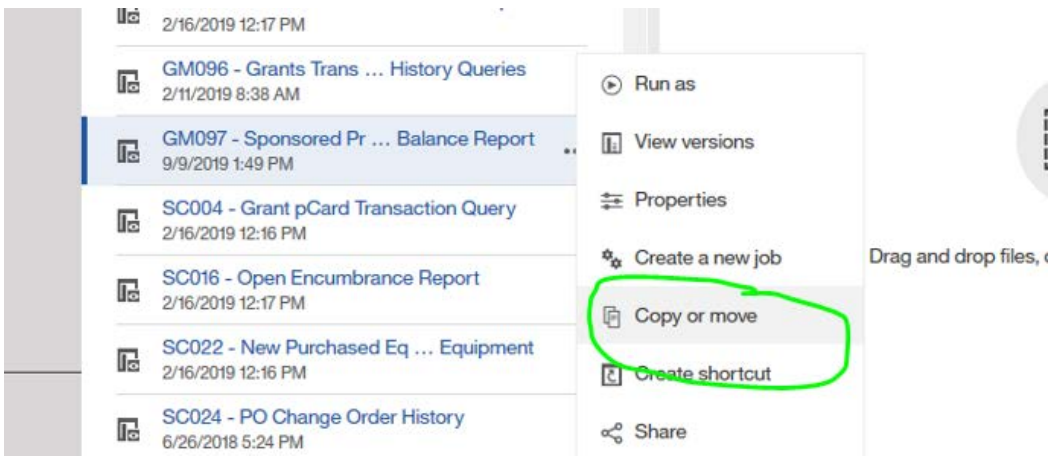


- In order to schedule Cognos reports for recurring delivery, Cognos users must first copy the reports from Team Content to their individual My Content folders. Individuals can schedule for distribution to multiple email addresses, which will be described below.



- Find the desired report, select the three horizontal dots indication "More" and select "Copy or move" from the pop-up menu.

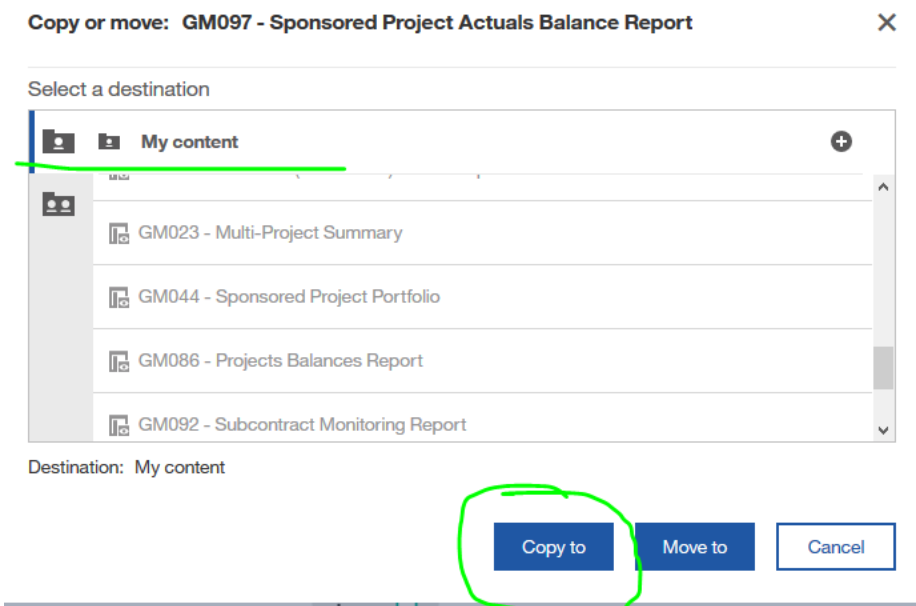




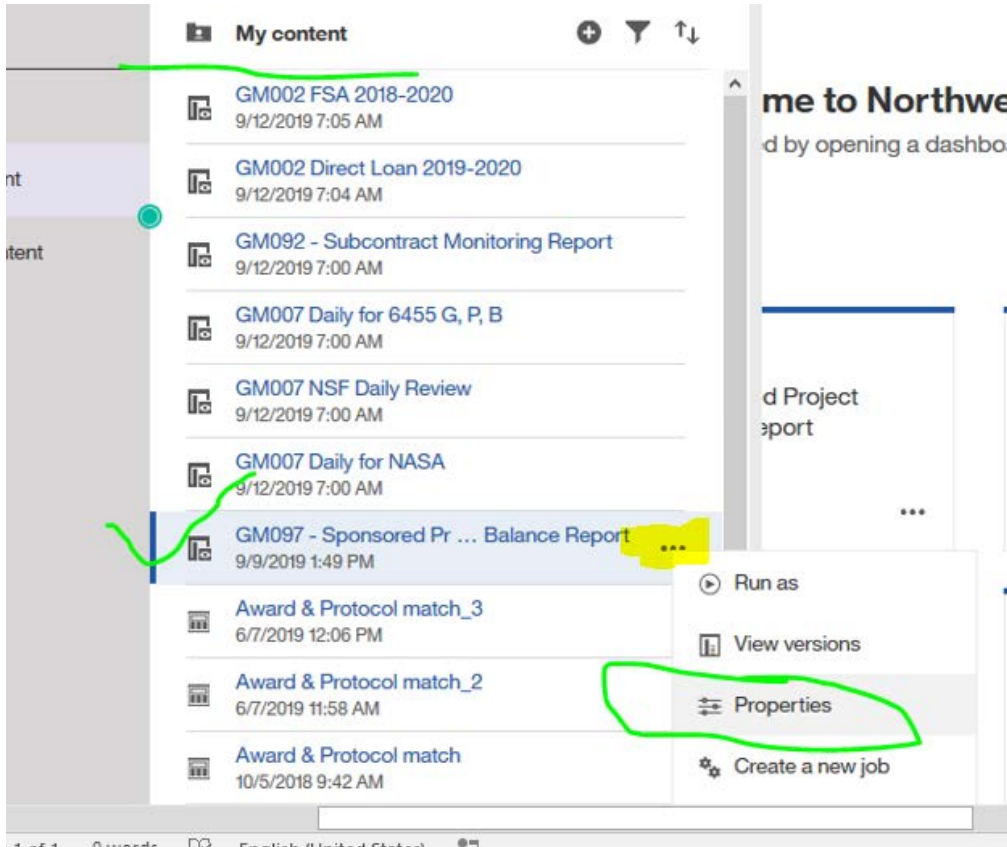
- Click on the Destination folder to activate the Copy to Button



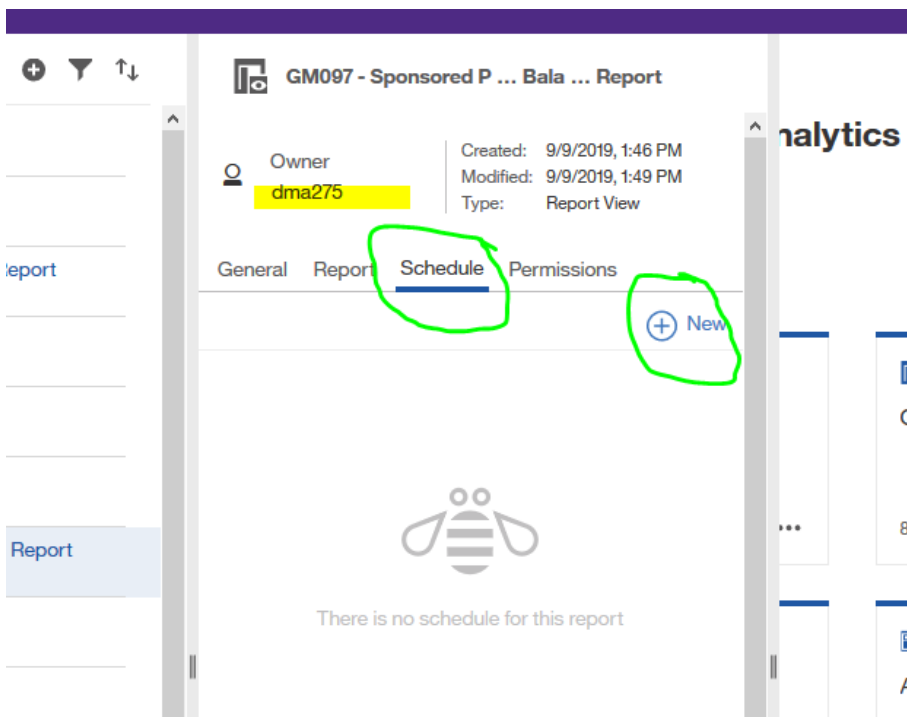
- My Content is already selected, Click the Copy to button



- **Scheduling:** On the newly copied My Content report select the three horizontal dots indication “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 is for delivery on the 10th of each month.
- On the Format menu deselect HTML and select Excel.

← Back **Create schedule**

Schedule Monthly ▾

Period

Start 2019-09-12 10:14 AM

No end date

Run on

Day of the month ✓

Day of the week

Day 10 ▾

Repeat every 1 Month(s)

- Select Excel for the Format.

Options

Format Excel >

Delivery Save >

Prompts Set values >

Languages >

- 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.

The screenshot shows a software interface with two main panels. The left panel is titled "Create schedule" and contains the following options:

- Period
- Start: 2019-09-12, 10:14 AM
- No end date
- Run on:
 - Day of the month
 - Day of the week
- Day: 10
- Repeat every: 1 Month(s)
- Daily time interval
- Options:
 - Format: Excel
 - Delivery: Save (with a right-pointing arrow circled in green)

The right panel is titled "Delivery" and contains the following options:


- Send report by email
- Print report
- Save report
- Done button

The "Delivery" title and the "Send report by email" option are underlined in green. The "Save" option in the left panel is circled in green.

- 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.

Delivery

 Send report by email

Attach the report


To: >


Subject:

Monthly GM097 for my department

This is an optional place to add an email message.

Include a link to the report ✖

 Print report

 Save report

Done

- Now set up the report parameters. Select Set values in the Prompts, Then click Set for Current values.

[< Back](#) **Create schedule**

Schedule

Period

Start

End

No end date

Run every week(s)

On day(s)

Daily time interval

Options

Format >

Delivery >

Prompts >

Current values

[Set](#) | [Clear](#)



You currently have no prompt values set

- This is where the report is set up as if running it as normal.
- ASRSP recommends the following parameters:
 - Current Period
 - Department Search & Select: Inserting all appropriate DeptIDs
 - Manager/Reviewer: no selection needed
 - ACTIVE (or ACTIVE and PENDING) Contract Status
 - Fund: no selection needed – all sponsored project funds automatically included
 - GCFA: no selection needed
 - Active Projects Only
- Click Finish and it will take you back.

Northwestern
GM097 - Sponsored Project Actuals Balance Report

Date Options
Select a date option

Current Period
 Previous Period
 User Defined Period

Department Prompt
Use the radio buttons to select a department(s) from a tree or by ID/description.

Tree
 Department Search & Select

Department
Search by entering all or part of a Department ID or its description.

Tip: Only the first 300 results can be displayed. Enter more information below and search again to reduce the number of search results.

Keywords:
Type one or more keywords separated by spaces.

5302000

Options ▾

Results:

5302000 - Allergy

Select all Deselect all

Manager/Reviewer
Search by entering all or part of a Manager/Reviewer Name or NetID.

Tip: Only the first 300 results can be displayed. Enter more information below and search again to reduce the number of search results.

Keywords:
Type one or more keywords separated by spaces.

Options ▾

Results:

Select all Deselect all

Department Prompt
Use the radio buttons to select a department(s) from a tree or by ID/description.

Tree
 Department Search & Select

Department
Search by entering all or part of a Department ID or its description.

Tip: Only the first 300 results can be displayed. Enter more information below and search again to reduce the number of search results.

Keywords:
Type one or more keywords separated by spaces.

5302000

Options ▾

Results:

5302000 - Allergy

Select all Deselect all

Fund
Select one or more Funds.

191 - Mandatory Cost Sharing
 192 - Over-the-Cap Commitment
 193 - Volntry Commit (Salary&NonSal)
 610 - Federal Grants and Contracts
 611 - Federal ARRA Grants& Contracts
 620 - Federal Flow-Through
 621 - Federal ARRA Flow-Through
 630 - State of Illinois Funding
 640 - Industry Clinical Trials
 650 - Other Grants and Contracts

Select all Deselect all

Project Status
Use the radio buttons to filter projects based on status.

All Projects
 Active Projects Only
 Inactive Projects Only

- Once prompts are set they are displayed

Current values		Set Clear
DeptTree	All Departments, Northwestern University	
ProjectPI		
Contact Status	ACTIVE	
Fiscal Year	-1	
ProjectStatus	Active Projects Only	
RadioPrmpt	Department Search & Select	
Fund	610 - Federal Grant ... Grants and Contracts	
Accounting Period	-1	
Department	5256000 - Psychiatry	
Date_Opt	Previous Period	
Manager\Reviewer		
GCFA		

- Click Create in the window.

The screenshot shows a 'Create schedule' window with two main sections: configuration on the left and 'Current values' on the right.

Configuration Section:

- Period:** Start date is 2019-09-12, time is 10:29 AM. No end date.
- Run on:** Day of the month, Day of the week.
- Day:** 10 (dropdown).
- Repeat every:** 1 Month(s).
- Daily time interval.
- Options:** Format (Excel), Delivery (Email, Save), Prompts (12 schedule prompt values), Languages, PDF (Select).
- [Classic View](#)
- Create** (highlighted in green) and **Cancel** buttons.

Current values Section:

- DeptTree: All Departments, Northwestern University
- ProjectPI
- Contact Status: ACTIVE
- Fiscal Year: -1
- ProjectStatus: Active Projects Only
- RadioPrmpt: Department Search & Select
- Fund: 610 - Federal Grant ... Grants and Contracts
- Accounting Period: -1
- Department: 5256000 - Psychiatry
- Date_Opt: Current Period
- Manager\Reviewer
- GCFA

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