How to Create a Report Schedule

1. Ensure you are on Campus or logged into VPN. Log into Cognos: [https://reporting.cofc.edu/](https://reporting.cofc.edu/)
2. Click the “Team Content” folder:
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3. Click the “Finance” Folder:

4. Click the “End User Reporting” Folder:
5. Click the “Institutional, Auxiliary, and Agency Reports” Folder:

6. Click “Budget and Transaction Reports (Current Fiscal Year)”: 
7. Find the desired Report you’d like to set up on a schedule and click the ellipses to the right:

8. Click “Copy or Move”
9. Click the “My Content” Icon and choose “Copy To”

10. Notice the green notification at the top center of the page once the report has been successfully copied (Shown in the next screenshot)
11. Move from Team Content to My Content now and find the newly copied report.

12. Navigate to Properties:
10. Choose your schedule parameters. Do you want this to run weekly, daily, monthly, which days, what time, etc?

11. Then select the format of your report; we highly recommend excel. And Choose Delivery options.
12. In delivery options, please ensure the blue checkboxes are checked: Send report by email, attach the report, enter your email into the To box and any message you’d like to send yourself.

13. Scroll down and click “Done”

14. Once all those features have been personalized to your desire: click “Create” to begin the report schedule.

This report will now be automatically sent to the emails provided on the days/times provided. Repeat for other reports as needed.