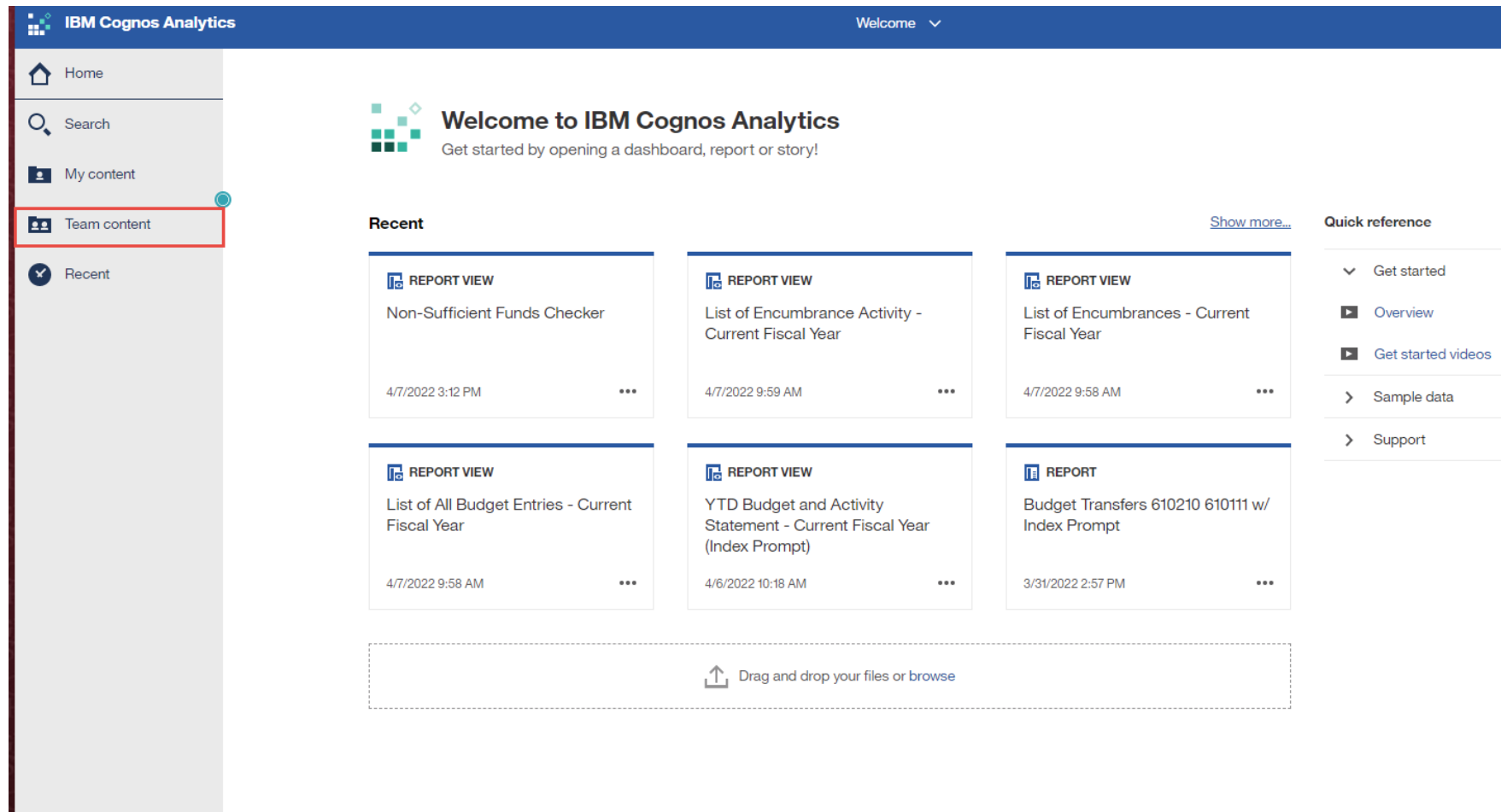


How to Create a Report Schedule

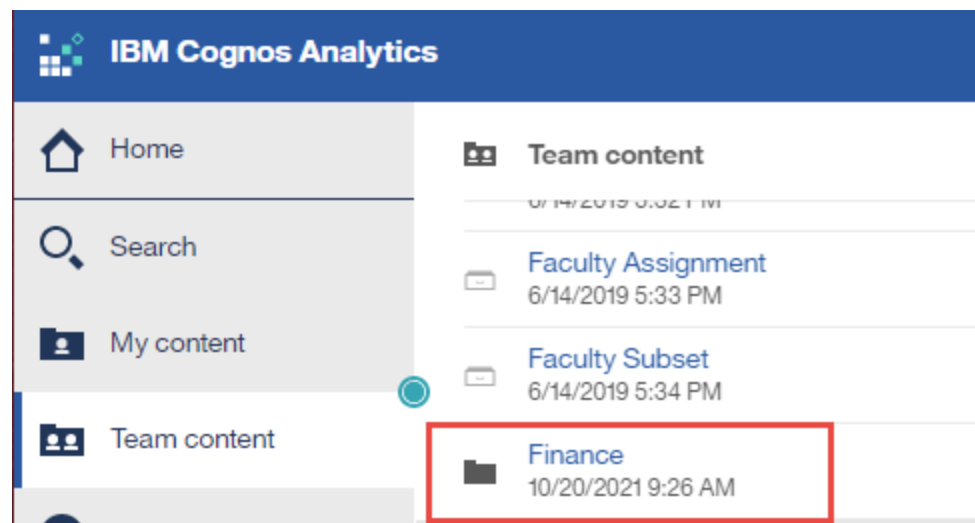
1. Ensure you are on Campus or logged into VPN. Log into Cognos: <https://reporting.cofc.edu/>
2. Click the "Team Content" folder:



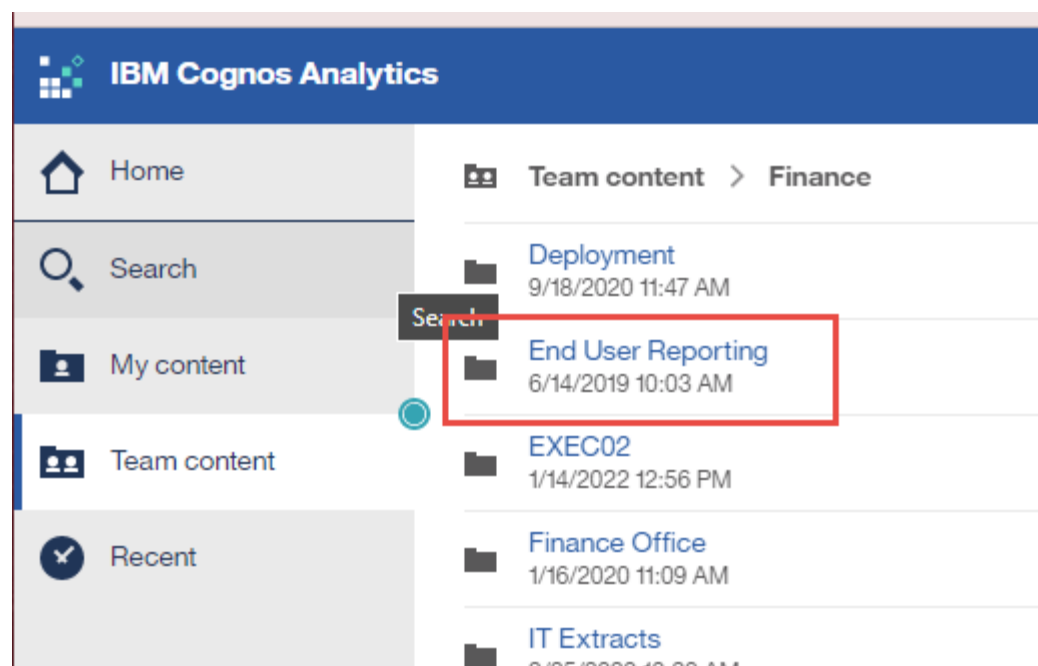
The screenshot displays the IBM Cognos Analytics dashboard. The left sidebar contains navigation options: Home, Search, My content, **Team content** (highlighted with a red box), and Recent. The main content area features a 'Welcome to IBM Cognos Analytics' message and a 'Recent' section with six report cards. A 'Quick reference' sidebar on the right lists options like 'Get started', 'Overview', 'Get started videos', 'Sample data', and 'Support'. At the bottom, there is a dashed box with an upload icon and the text 'Drag and drop your files or browse'.

How to Create a Report Schedule

3. Click the "Finance" Folder:

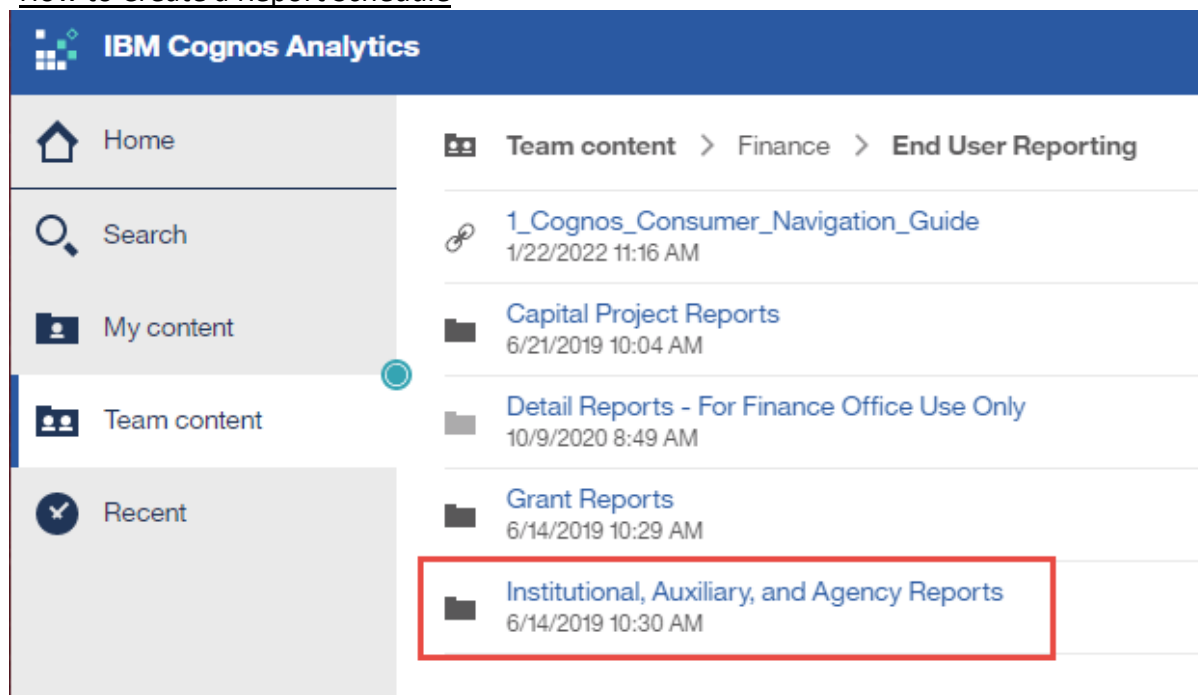


4. Click the "End User Reporting" Folder:



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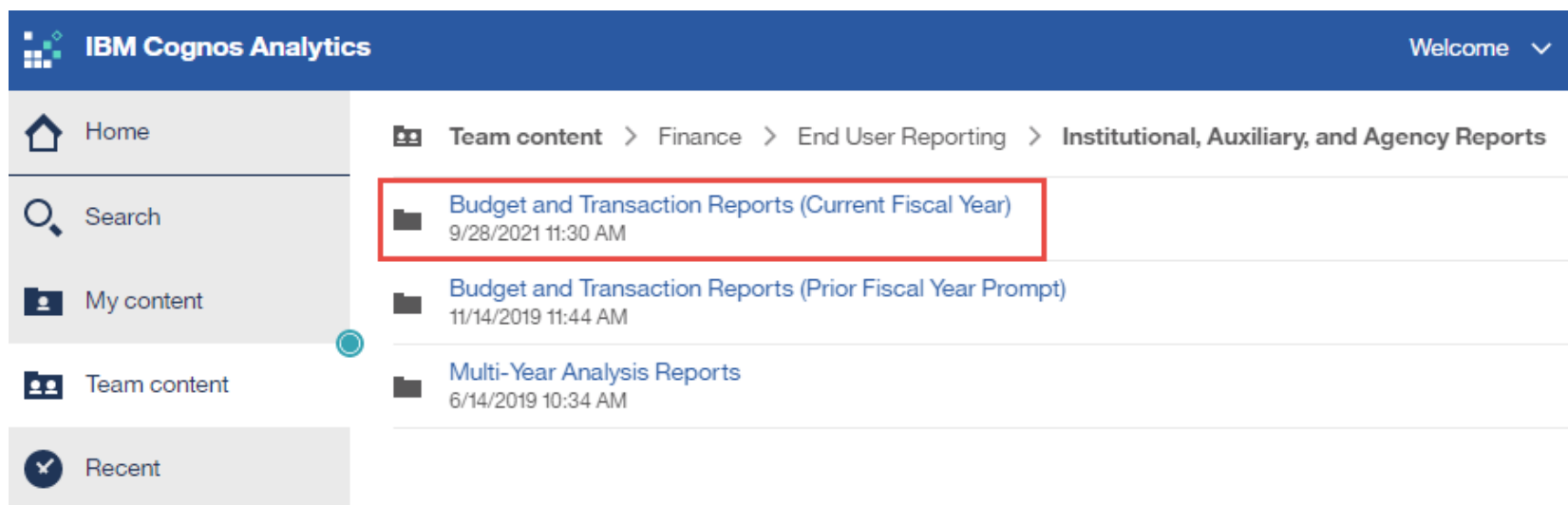
- Click the “Institutional, Auxiliary, and Agency Reports” Folder:



The screenshot shows the IBM Cognos Analytics interface. The left sidebar contains navigation options: Home, Search, My content, Team content (highlighted with a blue bar), and Recent. The main content area shows a breadcrumb trail: Team content > Finance > End User Reporting. Below the breadcrumb, a list of folders is displayed:

- 1_Cognos_Consumer_Navigation_Guide (1/22/2022 11:16 AM)
- Capital Project Reports (6/21/2019 10:04 AM)
- Detail Reports - For Finance Office Use Only (10/9/2020 8:49 AM)
- Grant Reports (6/14/2019 10:29 AM)
- Institutional, Auxiliary, and Agency Reports (6/14/2019 10:30 AM)** (highlighted with a red box)

- Click “Budget and Transaction Reports (Current Fiscal Year)”:

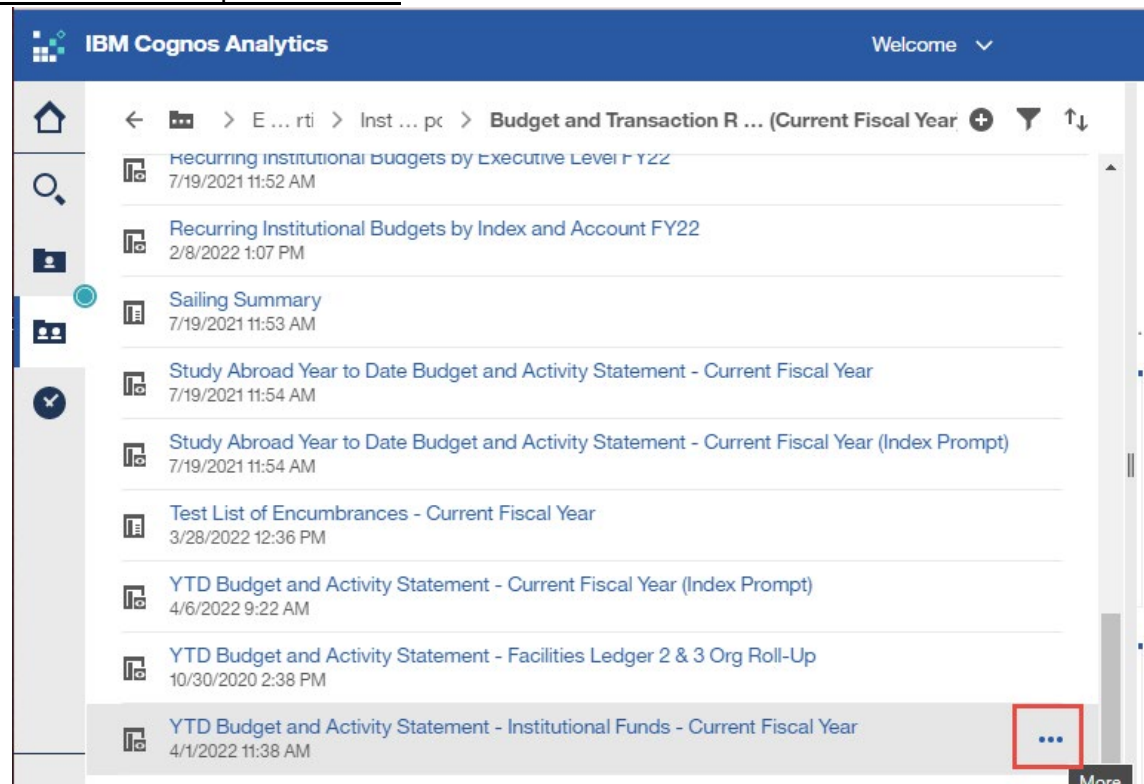


The screenshot shows the IBM Cognos Analytics interface. The left sidebar contains navigation options: Home, Search, My content, Team content, and Recent. The main content area shows a breadcrumb trail: Team content > Finance > End User Reporting > Institutional, Auxiliary, and Agency Reports. Below the breadcrumb, a list of folders is displayed:

- Budget and Transaction Reports (Current Fiscal Year) (9/28/2021 11:30 AM)** (highlighted with a red box)
- Budget and Transaction Reports (Prior Fiscal Year Prompt) (11/14/2019 11:44 AM)
- Multi-Year Analysis Reports (6/14/2019 10:34 AM)

How to Create a Report Schedule

- Find the desired Report you'd like to set up on a schedule and click the ellipses to the right:

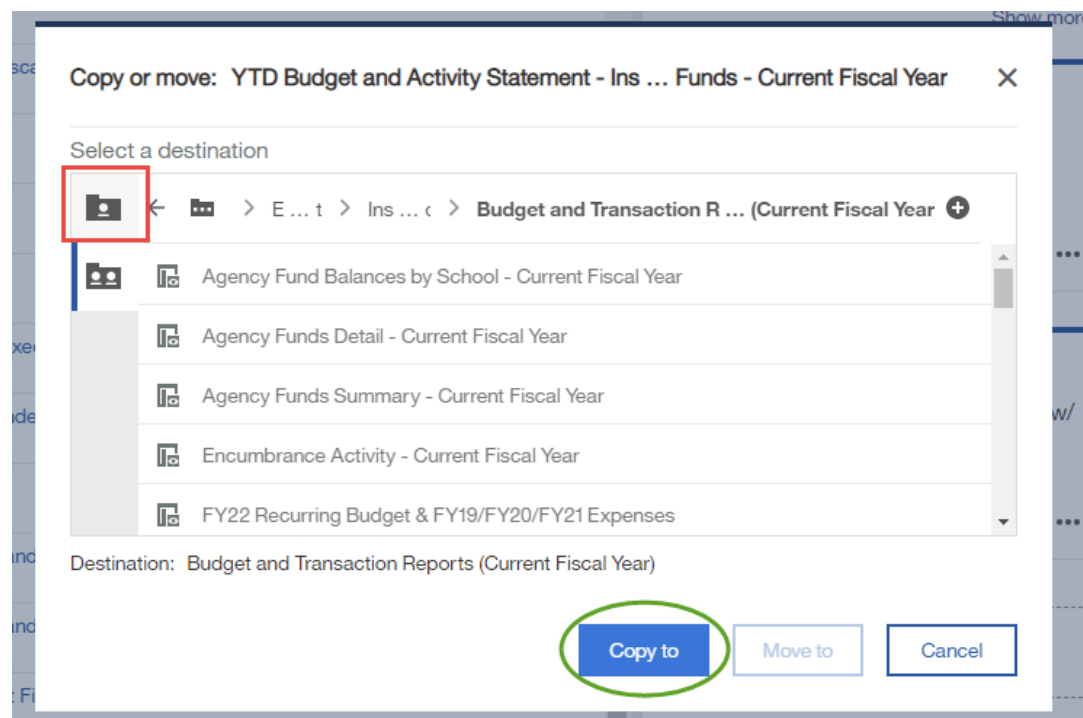


- Click "Copy or Move"



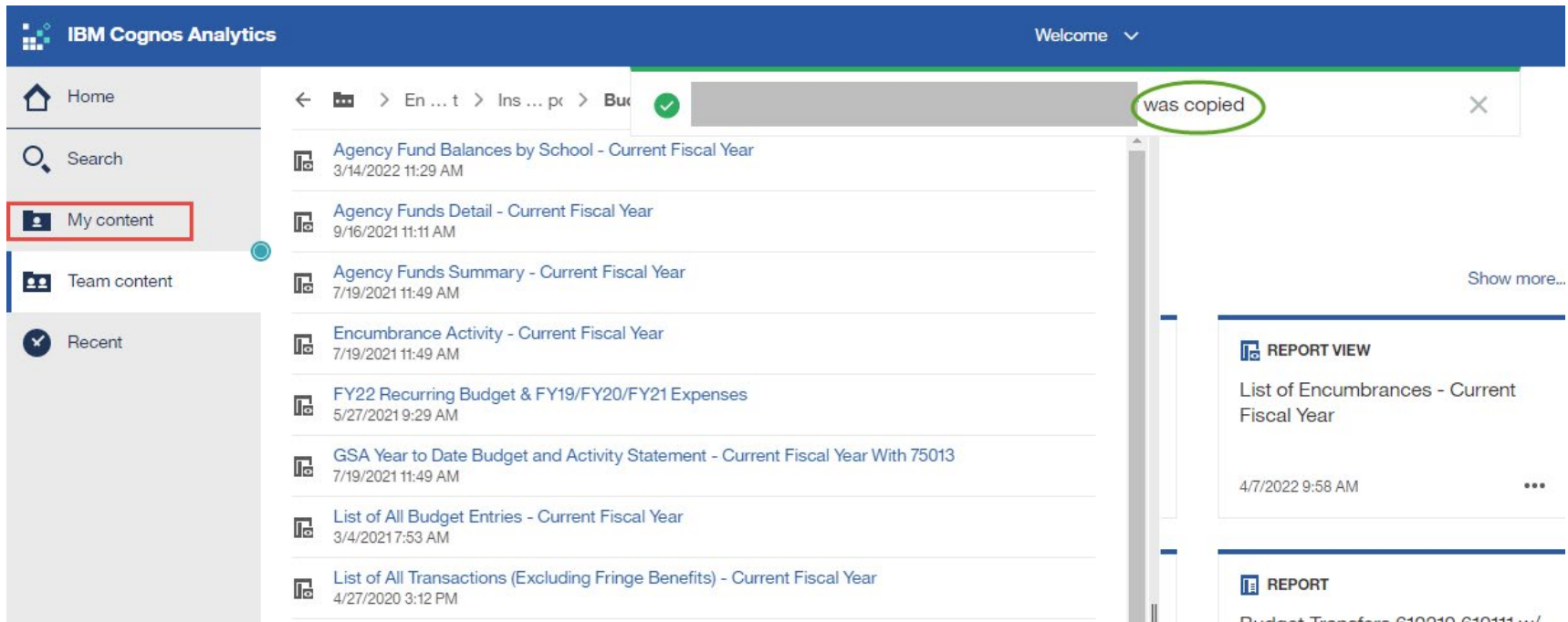
How to Create a Report Schedule

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)



How to Create a Report Schedule

11. Move from Team Content to My Content now and find the newly copied report.



The screenshot shows the IBM Cognos Analytics interface. On the left sidebar, the 'My content' option is highlighted with a red box. The main area displays a list of reports under the 'My content' tab. A notification bubble at the top right says 'was copied'. The list of reports includes:

- Agency Fund Balances by School - Current Fiscal Year (3/14/2022 11:29 AM)
- Agency Funds Detail - Current Fiscal Year (9/16/2021 11:11 AM)
- Agency Funds Summary - Current Fiscal Year (7/19/2021 11:49 AM)
- Encumbrance Activity - Current Fiscal Year (7/19/2021 11:49 AM)
- FY22 Recurring Budget & FY19/FY20/FY21 Expenses (5/27/2021 9:29 AM)
- GSA Year to Date Budget and Activity Statement - Current Fiscal Year With 75013 (7/19/2021 11:49 AM)
- List of All Budget Entries - Current Fiscal Year (3/4/2021 7:53 AM)
- List of All Transactions (Excluding Fringe Benefits) - Current Fiscal Year (4/27/2020 3:12 PM)

On the right, a 'REPORT VIEW' card is visible for 'List of Encumbrances - Current Fiscal Year' (4/7/2022 9:58 AM).

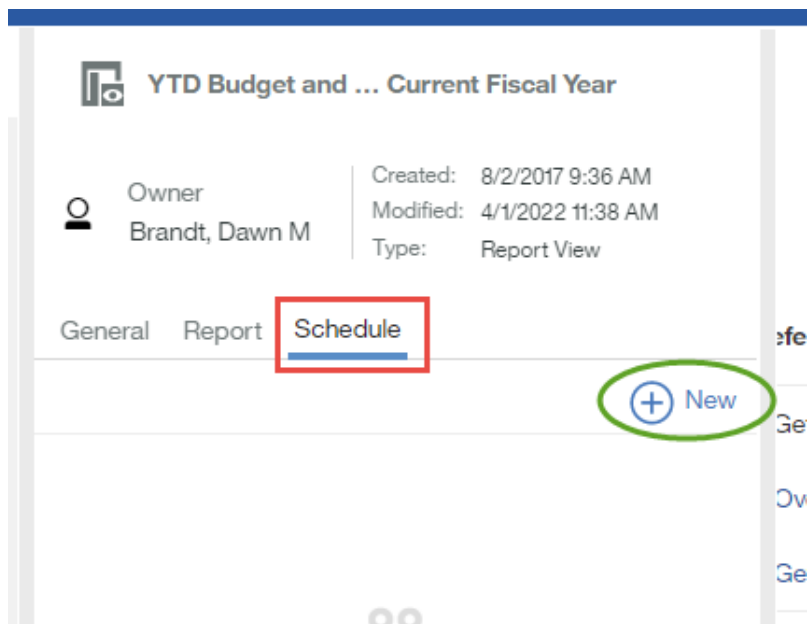
12. Navigate to Properties:



The screenshot shows a list of reports in IBM Cognos Analytics. A context menu is open over the report 'YTD Budget and Activity Statement - Institutional Funds - Current Fiscal Year' (4/1/2022 11:38 AM). The 'Properties' option in the context menu is highlighted with a red box. Other options in the menu include 'Run as', 'View versions', 'Copy or move', 'Create shortcut', 'Embed', 'Share', and 'Delete'.

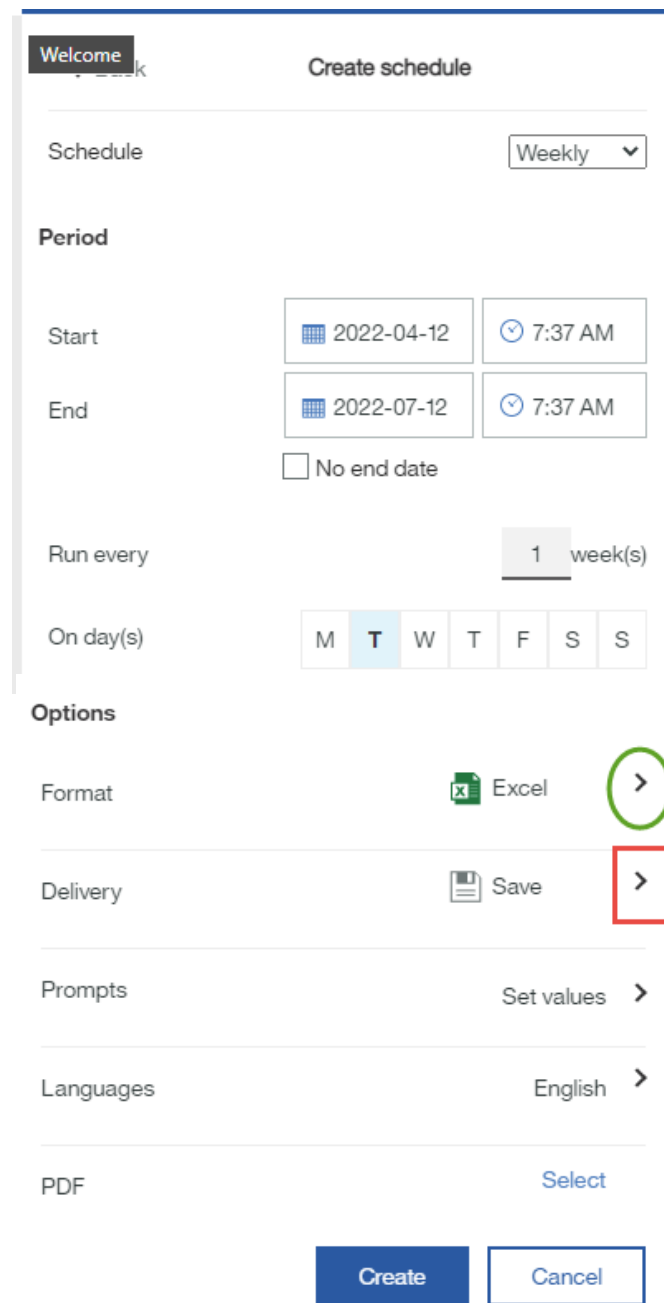
How to Create a Report Schedule

13. Click "Schedule" and +New:



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




How to Create a Report Schedule

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"

Delivery

 Send report by email

Attach the report

To: >


Grandshaw, Lindsey M ✕

Subject:

A new version of YTD Budget and Activity Sta

cc:

bcc:

 Save report as an external file

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.

< Back
Create schedule

Schedule Weekly ▼

Period

Start 2022-04-12 ▼

End 2022-07-12 ▼

No end date

7:39 AM ▼

7:39 AM ▼

Run every 1 week(s)

On day(s) M T W T F S S

Daily time interval

Options

Format
Excel ▼

Delivery
Email ▼
Save ▼

Prompts
Set values ▼

Languages
English ▼

PDF
Select

Create

Cancel