Create a Subscription (Schedule a Report)

In Cognos, reports can be configured to run automatically and deliver results by email. This functionality is managed through two features: **schedules** and **subscriptions**.

A **schedule** defines when a report runs and can distribute the results to multiple recipients. Schedules can only be created and managed by a **Cognos administrator**.

A **subscription**, however, allows individual users to receive report results via email. Any user with access to the report can create a subscription, and multiple subscriptions can be created for the same report - allowing you to receive the report at different times or with different prompt selections.

Steps

1. The report to be subscribed should be run and displayed in Cognos. If not, see the **View a Report** procedure to run a report.

2. On the black application bar, click the ⋮ **More** icon and select **Subscribe** from the dropdown. Note: there is another ⋮ More icon below the black one. This will not have the Subscribe option.

3. You will see three tabs: **Schedule, Options,** and **Prompts**. On each tab there will be boxed sections with an up arrow on the bottom right. Use the arrow to expand or shrink that section. In addition, there can be a scroll bar on the bottom or on the right to view the entire tab.

    a. On the **Schedule** tab, you can see the report's scheduled frequency and date start and stop time. You can edit it accordingly.

My Plan Roster - Active (4)

Schedule   Options   Prompts

Frequency

Type   Weekly   ▾

Repeat every   1   ↕   week

Repeat on   ☐ Monday   ☑ Friday
             ☐ Tuesday   ☐ Saturday
             ☐ Wednesday   ☐ Sunday
             ☐ Thursday

☐ Daily time interval   ⓘ
                                          ∧

Period

Start   2024-08-30 📅   10:04 AM
☑ No end date
                                          ∧

Advanced

Summary

Schedule
Run every 1 week(s) from August 30, 2024
at 10:04 AM on Friday.

Credentials
Waller (ADMIN), Mary
mjwalle_admin@ilstu.edu

Priority
3

Format
Excel Data

Delivery
Email

Languages
English (United States)

Number of prompts
3

Reset default options ↺

b. Clicking on the **Options** tab will allow you to see the format of the report. Pro tip: **Excel** shows report formatting and multiple pages, **Excel Data** is tabular with no formatting.

      i. In the **Delivery** box, leave the **Save** box checked and check the **Save report by email** box. Then click the Edit Details link on the right.

Subscribe

Format

Use default format
- ☑ HTML
  Edit options
- ☐ Excel Data

- ☐ PDF

- ☐ CSV

- ☑ Excel

- ☐ XML

Accessibility

☑ Enable accessibility support

Delivery

☑ Save
- ◉ Save report

☑ Send report by email   Edit details
1 recipient

☐ Send report to mobile device

☐ Print

ii. The **To** box will already include your email address, do not edit or add to it. You can edit the **Subject** and the **Message**.

iii. At the bottom of the page, make sure to toggle off the **Include Link** icon and toggle on the **Attach report output** icon. This will allow the report to be attached to your email.

Subscribe

Schedule   Options   Prompts

← Send report by email

To

Hendon (ADMIN), Joshua ✕

Cc | Bcc

Subject

A new version of Dean's List is available

Message

Include the following with my message

◯ Include link

✅ Attach report output

c. Click on the **Prompts** tab to validate your selected parameters. If you want to edit any of the parameters, click on the pencil and you can see the prompt pages for your report. Go through all prompt pages and make any changes you like. Remove any original selections you no longer want, because Cognos will not remove your original selections for you.

Subscribe

Schedule	Options	Prompts

Q Find   ⇅ 🗑 ✏

Parameter name	Parameter value
Term	Spring Semester 2025
p_college	
p_department	
p_frontpage	Plan
p_plans	Agriculture BS, Anthropology BA

4. Make sure to click the **Save** button in the lower right-hand corner to save your subscription.

View a Subscription

Once a user has subscribed to a report, the subscriptions can be edited or deleted. It is important for the user to review the subscription to be sure it is the subscription they want edited or deleted since there can be multiple versions of the same report with only (1), (2), etc. at the end of the name to distinguish between them.

1. At the far right on the black application task bar, click the 🔲 **Personal Menu** icon. A right sidebar will display.

2. Click on the **My schedules and subscriptions** link. It may take a minute to fully display the page. There are four different views, see the My Schedules and Subscriptions Page Overview for details.

3. In the upper left of the page click the down arrow to the right of **Current** and select **Schedule**. It will show all the user's subscriptions and schedules.

4. Find the subscription to be viewed using the tips below.

   a. Schedules and subscriptions are given the report name.

   b. All subscriptions are prefaced with the word "My" to distinguish them from schedules.

   c. If a report has more than one subscription, it will be displayed with (1), (2), (3), etc. at the end of the report name. This can be for multiple reasons.

      i. The user can create a subscription to run the same report, with the same prompts, multiple times a day. Each new subscription will get a number at the end after the first subscription is created.

      ii. The user can create a subscription to run for the same report, with different prompts. Each new subscription will get a number at the end after the first subscription is created.

5. To tell the difference between a subscription that has (1), (2), or (3), etc. after the name the user needs to:

   a. Click on the ⋮ More Actions Menu icon at the end of the row and select Modify this schedule from the dropdown. (See the image above.)

   b. View the current setup for the report's subscription in the sidebar. Click on Show Details link at the bottom to see the report's prompts. Click the Cancel button in the bottom right when done reviewing.
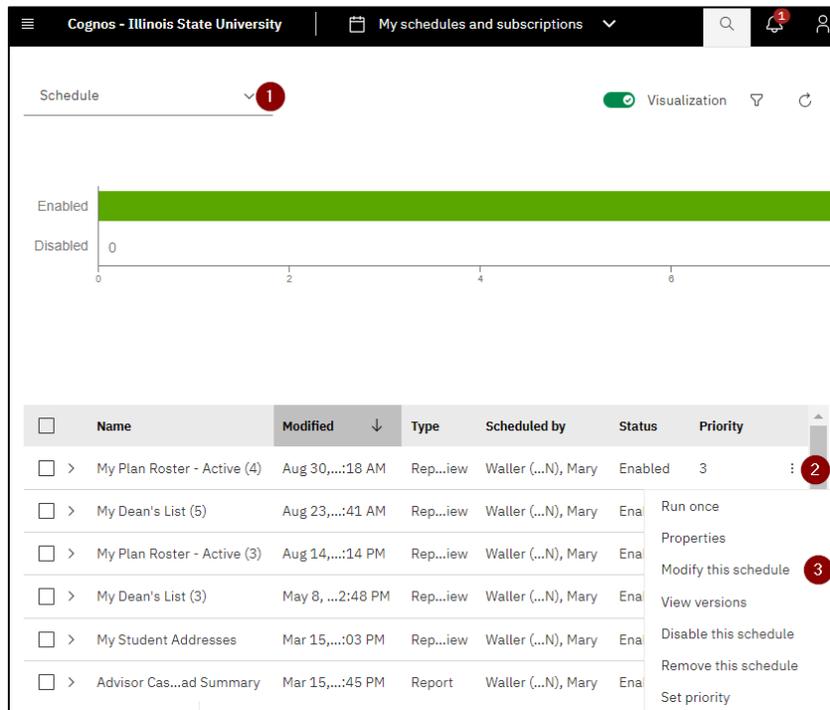
c. To see the report's prompts and schedule in the same format as when creating a subscription, instead of clicking on the Show details link at the bottom of the page, click on the Edit link in the upper right. (See first image above.)

  i. Navigate by clicking through the tabs Schedule, Options and Prompts. Use the scroll bar on the right to move up and down the page. For each section (gray box) on the page, look for the up or down arrow at the bottom right of the section. Click the arrow up or arrow down icon to expand or shrink that section. See the Edit a Subscription for more details and screenshots of these tabs.

  ii. Click Cancel when done reviewing so no changes are made to the subscription.

d. Do this for each version of the subscription to find the subscription to be viewed.
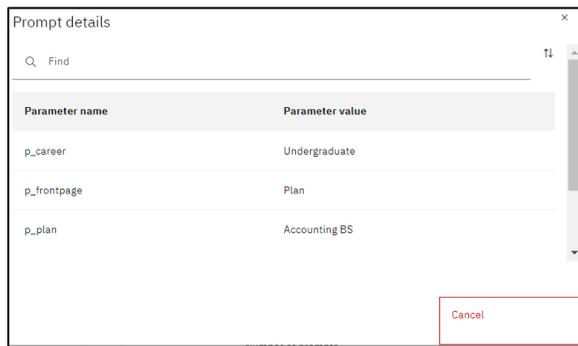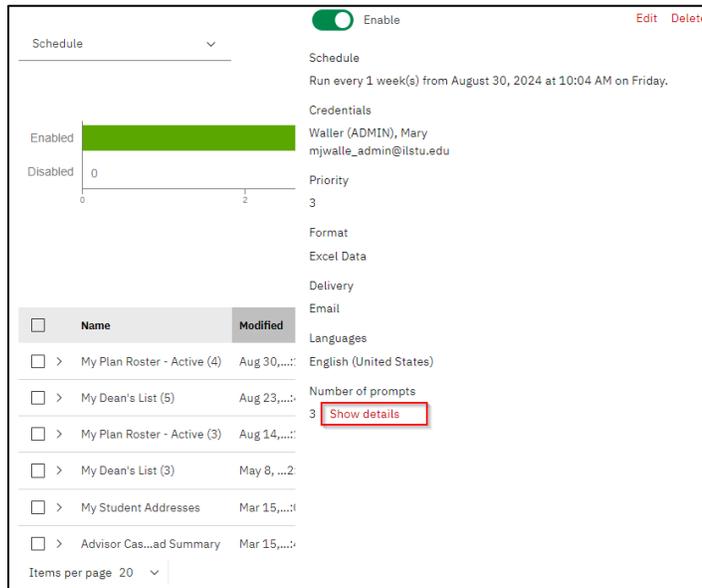
Edit a Subscription

Once a user has subscribed to a report, the subscriptions can be edited as explained below.

1. At the far right on the black application task bar, click the ⬛ **Personal Menu** icon. A right sidebar will display.

2. Click on the **My schedules and subscriptions** link. It may take a minute to fully display the page. There are four different views, see the My Schedules and Subscriptions Page Overview for details.

3. In the upper left of the page, click the down arrow to the right of **Current** and select **Schedule**. It will show all the user's subscriptions and schedules.

4. Find the subscription to be viewed using the tips below.

   a. Schedules and subscriptions are given the report name.

   b. All subscriptions are prefaced with the word "My" to distinguish them from schedules.

   c. If a report has more than one subscription, it will be displayed with (1), (2), (3), etc. at the end of the report name. This can be for multiple reasons.

      i. The user can create a subscription to run the same report, with the same prompts, multiple times a day. Each new subscription will get a number at the end after the first subscription is created.

      ii. The user can create a subscription to run for the same report, with different prompts. Each new subscription will get a number at the end after the first subscription is created.

5. To tell the difference between a subscription that has (1), (2), or (3), etc. after the name the user needs to:

    a. Click on the ⋮ **More** Actions Menu icon at the end of the row and select Modify this schedule from the dropdown. (See image above.)

    b. View the current setup for the report's subscription in the right sidebar. Click on **Show Details** link at the bottom to see the report's prompts. Click the **Cancel** button in the bottom right when done reviewing.

    c. Once you have found the subscription to be changed, or if you want more details about the subscription, instead of clicking on the Show details link at the bottom of the page, click on the **Edit** link in the upper right. (See first image on last page.) The right sidebar will remain open, but on the left a new page is displayed with a Schedule, Options and Prompts tab. The **schedule** tab is selected.

    On each tab there will be boxed sections with an up arrow at the bottom right. Use the arrow to expand or shrink that section. In addition, there can be a scroll bar on the bottom or right to view the entire tab.

My Plan Roster - Active (4)

Schedule   Options   Prompts

Frequency

Type   Weekly   ⌄

Repeat every   1   ⬍   week

Repeat on   ☐ Monday   ☑ Friday
             ☐ Tuesday   ☐ Saturday
             ☐ Wednesday   ☐ Sunday
             ☐ Thursday

☐ Daily time interval   ⓘ
                                               ⌃

Period

Start   2024-08-30 📅   10:04 AM
☑ No end date
                                               ⌃

Advanced

Summary

Schedule
Run every 1 week(s) from August 30, 2024
at 10:04 AM on Friday.

Credentials
Waller (ADMIN), Mary
mjwalle_admin@ilstu.edu

Priority
3

Format
Excel Data

Delivery
Email

Languages
English (United States)

Number of prompts
3

Reset default options ↺

i. On the **Schedule** tab, you can see the report's scheduled frequency and date start and stop time.

ii. Clicking on the **Options** tab will allow you to see the format of the report. Excel (shows report formatting and multiple pages) and Excel Data (tabular with no formatting).

iii. Clicking on the **Prompts** tab will show you the prompts currently selected for your report. Since they can be difficult to interpret, click on the pencil and seen the prompt pages for your report as if you are running the report. Go through all prompt pages if there are more than one. You may have to scroll

to be sure you see all selections. Multiple selections are possible for each prompt.


iv. Click Cancel when done reviewing so no changes are made to the subscription.

d. Do this for each version of the subscription until you find the subscription to be edited.

6. Once the **subscription** to be edited has been identified,

a. Click on the ⋮ **More Actions** Menu icon at the end of the subscription's row and select Modify this schedule from the dropdown. (See first image in this procedure.)

b. Click on the **Edit** link in the upper right to see tabs for all the subscription information.

c. Navigate by clicking through the tabs as explained above, modifying the schedule, options and prompts selections.

7. Edit how often the report should be run, at what time, and change the start and end date for when the schedule should start and end on the Schedule tab. For example, you can set up a subscription to run every Monday at 7:00 am starting on March 1, 2024 through May 30, 2024.

8. To change the format of the report, click on the **Options** tab and make changes in the Format section. One or more formats can be checked here.

9. To add or change emailing options for the report, click on the **Options** tab, use the scroll bar on the right to go to the Delivery section. We do not recommend changing these options. If not already expanded, click the arrow icon on the bottom right of the box. Make changes to the delivery options if desired.

    a. EDA recommends users click on the Send Report by email checkbox if not already checked.
    b. Then to the right, click on the Edit Details link.
    c. Scroll to the bottom and if the Include Link toggle is not green, click on it so the report will be attached in your email.
    d. Do not add any email addresses in the To textbox. Only the user's email should be entered in this textbox.

10. To change the prompts used for the report, click on the **Prompts** tab. It will display all the current prompt selections used when this report is run by the schedule.

    a. To change one or more prompts, click on the ✎ pencil icon on the upper right side.
    b. It will display one or more prompt pages that are displayed when the report is run directly. Make new prompt selections on these pages. When the user has entered all prompts, the original screen with all the new selections are displayed.

11. Click the **Save** button in the bottom right of the screen to save all your changes.

Delete a Subscription

1. At the far right on the black application task bar, click the 📇 **Personal Menu** icon. A left sidebar will display.

2. Click on the **My schedules and subscriptions** link. The My schedules and subscriptions page will display in Current view. It may take a minute to fully display the page. There are four different views. See the My Schedules and Subscriptions Page Overview for details.

3. In the upper left of the page click the down arrow to the right of **Current** and select **Schedule**. It will show all the user's subscriptions and schedules.
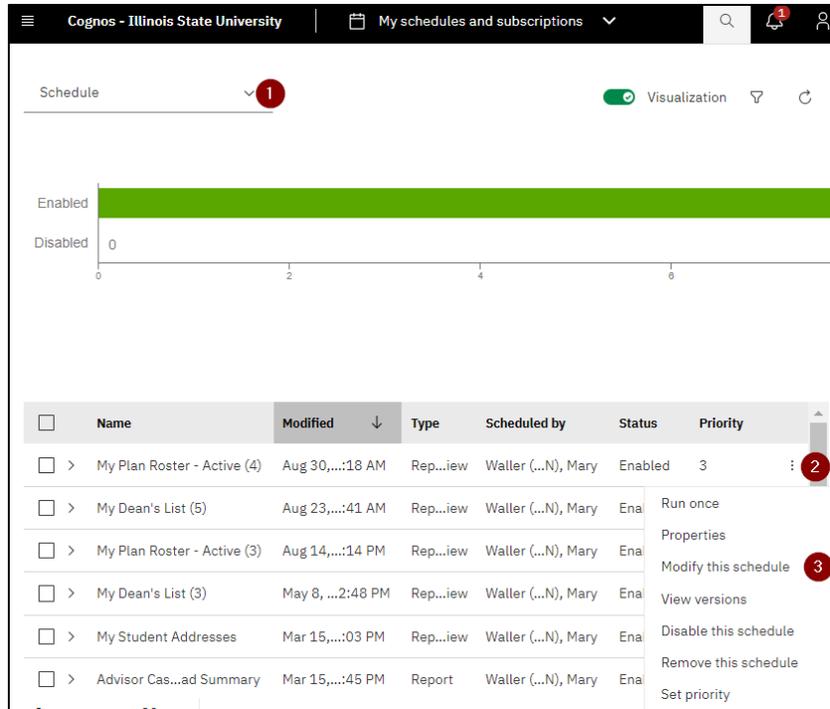
4. Find the subscription to be deleted using the tips below.

   a. Schedules and subscriptions are given the report name.

   b. All subscriptions are prefaced with the word "My" to distinguish them from schedules.

   c. If a report has more than one subscription, it will be displayed with (1), (2), (3), etc. at the end of the report name. This can be for multiple reasons.

      i. The user can create a subscription to run the same report, with the same prompts, multiple times a day. Each new subscription will get a number at the end after the first subscription is created.

      ii. The user can create a subscription to run for the same report, with different prompts, at the same time as another subscription. Each new subscription will get a number at the end after the first subscription is created.

5. To tell the difference between a subscription that has (1), (2), or (3), etc. after the name the user needs to:

   a. Click on the ⋮ More Actions Menu icon at the end of the row and select **Modify this schedule** from the dropdown. (See image above.)

   b. View the current setup for the report's subscription in the sidebar. Click on Show Details at the bottom to see the report's prompts. See the View a Subscription or Edit a Subscription procedure for more details on identifying a specific subscription using the Edit link.

   c. Do this for each version of the subscription to find the subscription to be deleted.

6. Once the subscription to be deleted is identified, click the ⋮ **More icon** at the right end of the row and select the **Remove this schedule** from the dropdown. The subscription is removed from the page and will no longer run.