ENTERPRISE DATA
AND ANALYTICS
Illinois State University

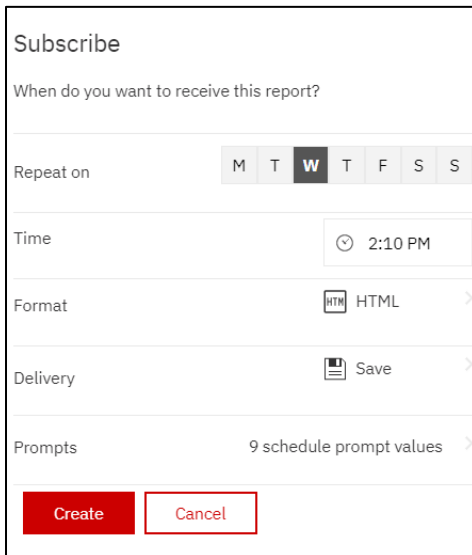# Create a Subscription (Schedule a Report)

In Cognos, users can schedule reports to automatically run and email the results. Cognos breaks this down into two functions: subscriptions and schedules. A report can only have one schedule and it can only be created by a Cognos administrator. On the other hand, any user with access to a report can create a subscription and can set over 20 subscriptions for a report.

Limitations

- A user can only schedule a report to run one or more days a week. There is no option to run a report monthly or yearly.

- The report can only be emailed to the user creating the subscription.

Steps

1. The report to be subscribed/scheduled has been run and is displaying 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. A left side bar with scheduling options is displayed. Note: there is another ⋮ More icon below the black one. This will not have the Subscribe option.

3. By default, the Subscribe side bar schedules the report to run for the current day of the week and time. This can be edited. Fill out the sidebar as follows:

    a. **Repeat On:** The letters displayed are for every day of the week starting with Monday. Click on the letter for every day of the week the report is to run. If the report is not to run today, unclick the letter for today since it is clicked by default.

b. **Time:** Edit the time the report is to run for the day(s) selected.

c. **Format:** Click on the faint arrow > to the right end of the format row to open a list of format options. Click the checkbox on one or more formats to be generated when the subscription runs. Click the Done button.

d. **Delivery:** Click on the faint arrow > to the right end of the Delivery row to open a list of Delivery options. It is recommended to check the Send report by email checkbox, which expands with more options. From here click the Attach the report checkbox, and the Save Report checkbox. Click the Done button.

e. **Prompts:** Click on the faint arrow > to the right end of the Prompts row to open a list of prompts. (A report may or may not have prompts). Review the prompts selected here. You may NOT change the prompts here.

   i. If the report the user wants to subscribe to should have different prompts, Click the <Back link at the top and then the Cancel button. Re-run the report with the desired prompts and start at the top of this procedure again to subscribe.
   ii. If the prompts are the correct prompts for the report, click the <Back link and then the Create button.

4. If the user wants to schedule the report with these prompts to run at a different time, start at the top of the procedure and create another subscription.

5. If the user wants to schedule the report with different prompts, re-run the report with the desired prompts and start at the top of the procedure to create another subscription.

View Subscriptions

Once a user has subscribed to a report, the subscriptions can be edited or deleted. It is recommended that users do not edit subscriptions. Instead, delete it and create a new one.

1. At the far right on the black application task bar, click the [icon] 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. 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, at the same time as another subscription. Each new subscription will get a number at the end after the first subscription is created.

4. 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.

   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.

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

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. 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.

4. 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.

   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.

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

5. 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.