



Using Reports

This chapter contains the following topics:

- [Accessing Reporting Options, page 1](#)
- [Set Access Permissions for a Report or Other Entry, page 2](#)
- [Accessing Prebuilt Reports, page 3](#)
- [Managing Reports, page 5](#)
- [Saving Reports, page 8](#)
- [Viewing Reports, page 9](#)
- [Emailing Report Output, page 14](#)
- [Scheduling Reports, page 16](#)

Accessing Reporting Options

All reporting options are integrated into the Service Catalog menus. The Reporting and Advanced Reporting options appear on a user's drop-down menu, provided that a permission which grants rights to execute these options has been granted to the user. Details on role-based access are given in the [Defining Roles to Access Reporting Feature Capabilities](#).

Reporting options are accessible from the Service Catalog menu:

The Reporting menu option provides the following options:

- Reports – the ability to run all prebuilt reports and to modify or copy reports (as appropriate to each user's privileges)
- Dashboards – the ability to configure the dashboard displayed by each user's portal to include specified KPIs

Set Access Permissions for a Report or Other Entry

Setting access permissions for an entry includes creating new permissions, or updating existing permissions. You can specify access permissions for all entries in Cognos 8. Some examples of such entries are reports, shortcuts, and report views. You can reference entries from different namespaces.

You must log on to the namespaces before you start your task. Otherwise, you will not have full administrative rights for the entries you want to modify.

To administer security, you must have set policy permissions. These are granted as part of the Site Administrator role.

To Set Access Permissions for a Report or Other Entry:

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- Step 1** In the portal, locate the entry for which you want to set access permissions.
- Step 2** In the **Actions** column, click **Set properties** for the entry.
- Step 3** In the **Set properties** page, click the **Permissions** tab.
- Step 4** Choose whether to use the permissions of the parent entry or specify different permissions:
- To use the permissions of the parent entry, uncheck the Override the access permissions acquired from the parent entry check box, and then proceed to the last step.
 - To set access permissions explicitly for the entry, check the Override the access permissions acquired from the parent entry check box, and then perform the remaining steps.
- Step 5** If you want to remove an entry from the list, check its check box and click **Remove**.
- Step 6** If you want to select or deselect all entries in a page, click **Select All** or **Deselect All** at the bottom of the list.
- Step 7** To specify the entries for which you want to grant or deny access to this entry, click **Add** and then choose a method:
- Tip** To make the user entries visible, check the **Show users** in the list check box.
- To add entries by choosing the names from the list, on the **Navigate** tab, click the appropriate namespace, and then check the check boxes next to the users, groups, or roles, and click **Add**. When the entries appear in the "Entries to be added" box, click **OK**.
 - To search for users, groups, or roles in a namespace you are currently using, on the **Search** tab, type the text in the Search string box. If needed, specify additional search criteria, and click **Search**. When the entry appears in the "Search results" box, click **Add**, and then, when the entry appears in the "Entries to be added" box, click **OK**.
 - To add entries by typing the names, on the **Type** tab, in the "Type the names" box, type the names of namespaces, groups, roles, or users in the following format, and then click **Add**.
- namespace_name;namespace_name/group_name;namespace_name/role_name;namespace_name/user_name;
- Here is an example: LDAP;Cognos/Authors;LDAP/scarter;
- Separate each entry using a semicolon (;).
- When the entries appear in the "Entries to be added" box, click **OK**.
- The entries you added appear in the list.

- Step 8** For each entry in the list, in the box next to the list, check or uncheck check boxes to specify what type of access you want to grant or deny.
- Step 9** Click **Apply**.
In the Permissions column, an icon appears next to the user, group, or role. This icon represents the type of access granted or denied to the entry.
- Step 10** If you want to replace the existing permissions of the child entries with the permissions you set for this entry, in the Option section, check the Delete the access permissions of all child entries check box.
This option appears only with entries that are containers.
- Step 11** Click **OK**.

Accessing Prebuilt Reports

Service Catalog reports (available in the top-level public folder Service Performance Reports), and the folder in which each is located, are summarized in the table below.

The Service Authorization and the Service Delivery reports include any ad-hoc tasks that were initiated in the authorization and service delivery moments, respectively. They do not include any tasks that were part of requests that were cancelled, either by the user or by a service team manager cancelling delivery of the request.

Table 1: Prebuilt Reports Inventory

Report Title	Folder	Description
Aging of Requests by Performer	Daily Request Management	Effective for investigating or reporting on the number of open and late tasks for an individual
Aging of Requests by Queue	Daily Request Management	Effective for investigating or reporting on the number of open and late tasks for a queue
Authorization: On-time % by Customer	Service Authorization Performance	Effective for investigating or reporting on the authorization on-time performance by a customer (OU)
Authorization: On-time % by Performer	Service Authorization Performance	Effective for investigating or reporting on the authorization on-time performance by individuals
Authorization: On-time % by Queue	Service Authorization Performance	Effective for investigating or reporting on the Authorization on-time performance by queues
Services by Dictionary	Service Design Details	Administrative report for managing the use of dictionaries
Functional Positions	People, Roles & Groups	Administrative report which lists all functional positions

Report Title	Folder	Description
Groups by Organizational Unit	People, Roles & Groups	Administrative report which lists groups and shows their Organizational Unit
Groups by People	People, Roles & Groups	Administrative report which lists People and shows their groups
Organizational Units by Group	People, Roles & Groups	Administrative report on groups and their organizational units
Organizational Units by People	People, Roles & Groups	Administrative report on people and their organizational units
Organizational Units by Queues	People, Roles & Groups	Administrative report on queues and their organizational units
People by Groups	People, Roles & Groups	Administrative report listing people and their groups
People by Organizational Unit	People, Roles & Groups	Administrative report listing people and their organizational units
Queues by Organizational Unit	People, Roles & Groups	Administrative report listing queues by organizational unit
Service Delivery: On-time % by Performer	Service Delivery Performance	Effective for evaluating or comparing the performance of individuals in performing their work
Service Delivery: On-time % by Queue	Service Delivery Performance	Effective for evaluating or comparing the performance of queues in performing their work
Service Delivery: On-time % by Service	Service Delivery Performance	Effective for evaluating the on-time performance for services and their related tasks
Service Pricing Details	Service Design Details	Administrative report for managing the pricing information for services
Service Volume: Request Activity by Service	Service Volumes & Activity	Effective for measuring and monitoring total service request activity within service groups
Service Volume: Request Activity Details	Service Volumes & Activity	Effective for investigating or reporting on the status of individual service delivery transactions
Service Volume: Request Activity Summary	Service Volumes & Activity	Effective for measuring and monitoring total service request activity within specific reporting periods

Report Title	Folder	Description
Service Volume: Request Trend by Service	Service Volumes & Activity	Effective for measuring and monitoring service request activity trends by service group and calendar quarter
Services by Service Team	Service Design Details	Effective for managing expenditures for services against an established budget

Managing Reports

Report Designer can be used to define and publish a new report, or to modify an existing report and save the changes, using the ReportNet Professional Author tool. This functionality accommodates users who may need to query data within the application that is not covered by the out-of-the-box reports, but allows for the creation of more complex and sophisticated queries than the Ad-Hoc Report function.

The Report Designer is intended for users with some knowledge of report building. See Ad-Hoc Reports if you have no experience with advanced Reporting concepts.

Building a New Report

Follow these steps to create a new report:

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- Step 1** Choose Advanced Reporting from the Module drop-down menu.
- Step 2** Click **Report Designer**.
- Step 3** Choose which package to use to create a new report:
- **Custom Reports Data Model:** Use this data model to create reports that are based on Prime Service Catalog operational data such as requisitions, services, and tasks. The Custom Reports Data Model also includes a form data from services and dictionaries that have been made reportable.
 - **Standard Reports Data Package:** Do not use this data model because Cisco will deprecate it in a future release.
- Step 4** Cognos Report Studio opens in a new window. Use this application to build your report.
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Modifying an Existing Report

Navigate back to your saved report to make modifications.

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- Step 1** Choose **Advanced Reporting > Report Designer > Public Folders**. Click **Reports**.
 - Step 2** Find the report you wish to edit and select it.
 - Step 3** Cognos Report Studio opens in a new window. Use this application to modify your report.
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Generating Reports

All reports options are available in the “Public Folders” folder. The home page shows the top-level report folder: Service Performance Reports.













The page initially appears in “List” view—only the folder title is shown, with a “More...” link providing access to reporting options. Especially for new users, it might be more useful to display Reporting pages in “Details” view, to see a brief description of each folder or report, and to have handy some of the more common options. To switch the view, simply click the “Details View” icon—the second from the left in the icon bar at the top right of the page. (Viewing and other preferences may be saved, as explained in the section on Preferences.)

Each folder name is presented as a hyperlink; clicking on that link shows the folder contents, which may include both folders and reports themselves. As you click through the folders to find the report of interest, the “bread crumbs” (directly under the “Public Folders” tab) are updated to reflect the navigation path. For example, the “Authorization: On-time % by Customer” report is in the “Service Authorization Performance” folder.

To run reports:

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- Step 1** Choose **Reporting > Reports**.
 - Step 2** Browse to the folder categories to find a report that contains the type of data you wish to view.
 - Step 3** Choose a report.
 - Step 4** Use the **Report Viewer Prompt** pages to enter your report criteria and date ranges.
 - Step 5** Click **Next** to continue choosing report criteria or **Finish** to run your report.
 - Step 6** The report appears in your browser window. Use the icons in the top right corner to save, email, or rerun the same report using different parameters. You can also elect to view or save the report in the following formats: HTML, PDF, Excel, CSV or XML. You can print the report from your browser or within the application in which you save the report. In addition, the following reporting options may be available via the icons directly underneath the report name and the More link.

Table 2: Reporting Options Table

Reporting Option	Explanation
 Set properties	Change properties of the report. Available only to report administrators (for Public Folders) or for owners of report views on My Folders.
 Run with options...	Present an option page before running the report. The option page allows adjustment of the print output format.
 View report output versions	View the output of a report that was previously saved. Available only if the report has saved output.
 View most recent report	View the most recent output of a saved report. Available on the More... page only if the report has saved output.
 Open with Report Studio	Open the report in Report Studio (Report Designer), to modify or review the report definition. Available only to Report Administrators or owners of the report who have permission to run Report Designer.
 New schedule...	Schedule the report to be run automatically. Available only to Report Administrators or owners of the report. Other users are able to view the schedule.
 Create a shortcut to this entry...	Available only via the More... option. Create a shortcut to the report on any folder to which you have write permission.
 Create a report view of this report...	Create a view of the report, saving it to your private folders. This allows you to modify the properties of the report, to schedule it, or to save output versions.
 Move...  Copy...  Delete	Only Report administrators can modify public reports or folders. However, report users may copy reports to their private folders or create private views of the reports, and manipulate these.
 Add to bookmarks...	Available only via the More... option. Add a bookmark to the current report to browser favorites.

Working with Interactive Workspaces and Advanced Data Exploration

You can now create interactive workspaces and reports as per your requirements and tag them as favorites. You can also view and modify content in the workspaces and email them to intended audience.

To create workspaces:

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- Step 1** Choose **Reporting > Reports > Launch > Cognos Workspace** or **Choose Advanced Reporting > Report Designer > Launch > Cognos Workspace**.
- Step 2** For more information about configuring workspaces, see [IBM Cognos Business Intelligence Guide](#).
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Is a report designer tool to author reports and analyze the data. You can now perform advanced data exploration such as:

- Specifying additional measures
- Adding conditional formatting
- Using Advanced Calculations

Generating Advanced Reports

You can also create reports with dimensional or relational datasources that display your data in lists, cross-tabs and charts. To generate advanced reports:

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- Step 1** Choose **Reporting > Reports > Launch > Cognos Workspace**.
- Step 2** For more information about creating Cognos workspace advanced reports, see [IBM Cognos Workspace Advanced version 10.2.1 User Guide](#).
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Note

To access Cognos Workspace and Cognos Workspace Advanced, you must have the Report Designer capabilities previously defined.

Saving Reports

A “Report View” is a copy of a report. Customizations can only be applied to a report for which the user has edit permission. By default, only Report Administrators have edit permission to the prebuilt reports. Therefore,

a primary reason for creating a report view is to create a private copy of the report to which a user's customizations can be applied. Typical customizations include the ability to save the report filter criteria (parameters) previously entered; to schedule the report, either one time or on a recurring basis; to save previously run versions of the report output; and to change the report properties such as the default output format.

You can share a report with others by saving the report in a location that is accessible to other users, such as in the public folders. Public folders typically contain reports that are of interest to many users.

If you want to share a report that is currently located in your personal folders, you can copy the report, move the report, or create a shortcut to the report and save it in the public folders.

For more information about saving reports, see the *Query Studio User Guide* or *Cognos Report Studio User Guide*.

To save a report:

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- Step 1** Choose **Advanced Reporting > Public Folders** or **My Folders**, click **Run** next to the report you want to run. The "Run with options" dialog box appears.
 - Step 2** Under **Delivery**, check the check box next to "**Save the report**".
 - Step 3** Click **Run**.
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Saving Reports as a Report View

To save the report as a report view:

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- Step 1** Choose **Advanced Reporting > Public Folders** or **My Folders**, click **Run** next to the report you want to run. The "Run with options" dialog box appears.
 - Step 2** Click **Advanced options**.
 - Step 3** Under **Delivery**, click the button next to "**Save the report**", "**print it**", or "**send an email**".
 - Step 4** Check the check box next to "**Save the report as a report view**".
 - Step 5** If you want to change the name or destination folder of the report view, click **Edit the save as options**, make the changes and click **OK**.
 - Step 6** Click **Run**.
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Viewing Reports

Reporting opens to a page of Public Folders. These folders contain all the out-of-the-box reports available to system users. The My Folders link provides access to folders and reports that you have already run and saved.

A report displays in a series of pages. Hyperlinks at the bottom of each page allow you to navigate through these pages. The number of rows displayed on a page may be modified by setting the corresponding report property. An icon bar at the top of the report page displays available options:

These options are summarized in the table below and explained in detail in the following sections.

Table 3: Reporting Options to view a Report

Reporting Option	Explanation
 Keep this version ▼	Save the report output, by emailing the report or saving its output, or create a view of the report.
	Run the report again.
	Drill down/drill up; these links are not enabled.
 ▼	Go to any related links that have been defined for this report. Report administrators or owners may add links; by default, none are defined.
 ▼	Indicates the current output format for the report and allows you to rerun the report in an alternate format. Default format is HTML; PDF, XML, and Excel formats are also available.
 Add this report ▼	Add a shortcut to this report to your private pages or create a bookmark to the report in your browser.
 Watch new versions ▼	Allows you to designate that an e-mail alert should be sent to you (the report owner) whenever output for this report is saved; available only if you have previously saved report output.
	Return to the Reports home page.
	Return to the page from which you invoked this report.

Table 4: Folders Description Table

Public Folders	Description	Contains
People, Roles, and Groups	Public Folders are grouped into the following categories: Use these reports to gain visibility into the structure of an organization. The results will help to optimize the way an organization is structured.	Functional Positions Groups by Organizational Unit Groups by People Organizational Unit by Groups Organizational Unit by People Organizational Unit by Queues People by Groups People by Organizational Unit Queues by Organizational Unit
Service Authorization Performance	Use these reports to view the percentage of on-time performance for Authorization tasks. The results will help to identify any bottlenecks in the authorization and approval process.	Authorization: Ontime% by Customer Authorization: Ontime% by Performer Authorization: Ontime% by Queue
Service Design Details	Use these reports to gain visibility into the structure of the Service Catalog. The results will help to optimize the design of the Service Catalog for a better user experience.	Services by Service Team Dictionaries by Service Service Pricing Details
Request Management	Use these reports to monitor how Requests and Tasks have progressed over a period of time. The results will help to identify which Tasks and Requests are impacting Service Levels.	Aging of Requests by Performer Aging of Requests by Queue
Service Delivery Performance	Use these reports to view the percentage of on-time service delivery. The results will help to identify any bottlenecks in the service fulfillment process.	Service Delivery: Ontime% by Customer Service Delivery: Ontime% by Queue Service Delivery: Ontime% by Service

Public Folders	Description	Contains
Service Volumes and Activity	Use these reports to gain visibility into the transaction volume of Service Requests. The results will help to identify any trends in the Service Request activity across your user base	Service Volume: Request Activity by Service Service Volume: Request Activity Details Service Volume: Request Activity Summary Service Volume: Request Trend by Service

To return to the page from which you selected the report, click **Return** at the top right of the page. To run the report again, click the **Run** icon.

**Tip**

Tips for using the Report Viewer:

- Fields marked by a red asterisk are mandatory.
- Use the Keyword field if you need to search for, or narrow down, the items you are running a report on.
- The Report Viewer allows a wildcard search in the prompts using the % symbol.
- Once you have the search results, which returns all values if you use the % symbol, you can select all the search results by clicking the Select All link below that search box.
- The system runs the report based on the data in the Choices field, and when applicable, over a specified period of time

Cognos offers two ways of viewing the reports and folders, represented by icons at the top right of each page. The selected view is highlighted.



	The "Details View" includes a brief description of each report.
	The "List View" is the default view. Once you become familiar with the reports, folders, and their contents, you may want to switch to this view, which simply lists the contents of the current folder, as shown below.

Figure 1: List View

Previous 1 - 3 Next

	Name	Modified	Actions
<input type="checkbox"/>	Authorization: On-time % by Customer	January 8, 2007 3:43:11 AM	More...
<input type="checkbox"/>	Authorization: On-time % by Performer	January 8, 2007 3:43:16 AM	More...
<input type="checkbox"/>	Authorization: On-time % by Queue	January 8, 2007 3:43:22 AM	More...

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Rather than setting this view manually, the Preferences page allows you to set preferences that are used whenever you use the Reporting module. To set preferences, click the **My Area** link to the top-right of the menu bar, then **My Preferences**.

Figure 2: My Area



The General tab of the Set Preferences page appears.

Entries at the top of the page allow you to change the default view (List or Details) and to further customize that view.

Figure 3: My Preferences General Tab

General Personal Portal Tabs

Specify your settings.

Number of entries in list view:

Report format:

Separators in list view:

Show the Welcome page at startup

Show a summary of the run options

Style:
 [Preview](#)

Show hidden entries

Portal

Default view:
 List
 Details

Number of columns in details view:

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Entries at the bottom of the page pertain to the user's location/locale. The time zone is used when scheduling reports. The default time zone is the time zone where the reporting server is located. In a distributed

implementation, users need to set the time zone to their current location in order to easily schedule reports to be run.

Figure 4: My Preferences General Tab Regional Options

Regional options

Product language:

Use the default language

Use the following language:

English

Content language:

Use the default language

Use the following language:

English

Time zone:

Use the default time zone

Use the following time zone:

(GMT-08:00) Pacific Time: Los Angeles, Tijuana, Vancouver

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There is no support for rendering of non-English form data or facts table content at this time. The product and content languages should be set to the default language which is English.

Emailing Report Output

Two e-mail delivery options available are:

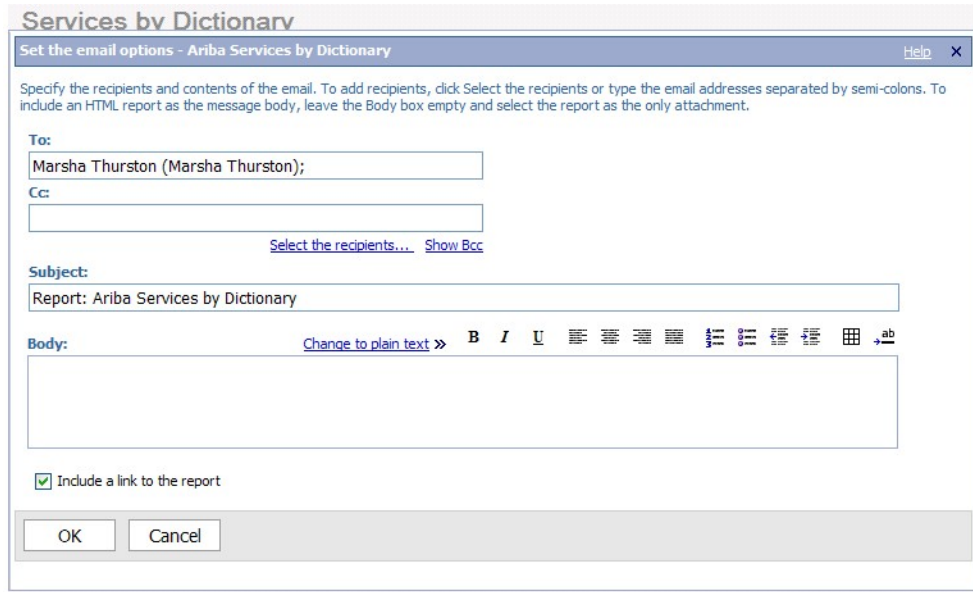
- Include the report (as an attachment) in the e-mail. This is the default behavior when the report properties are set to “Send the report to me”, so the option is not available.
- Include a link to the report in the e-mail—the recipient must be Service Catalog users with permission to run reports.

There are several ways to e-mail report output to both the person who runs the report and additional participants.

- Click **Run with options** and choose **Send me the report by email**. To specify additional recipients, click **Advanced options** and, under the **Delivery options**, click edit the options for the “**Send the report by e-mail**” option.

- Run the report, and click **Keep this version > Email this report**.

Figure 5: Set the Email Option

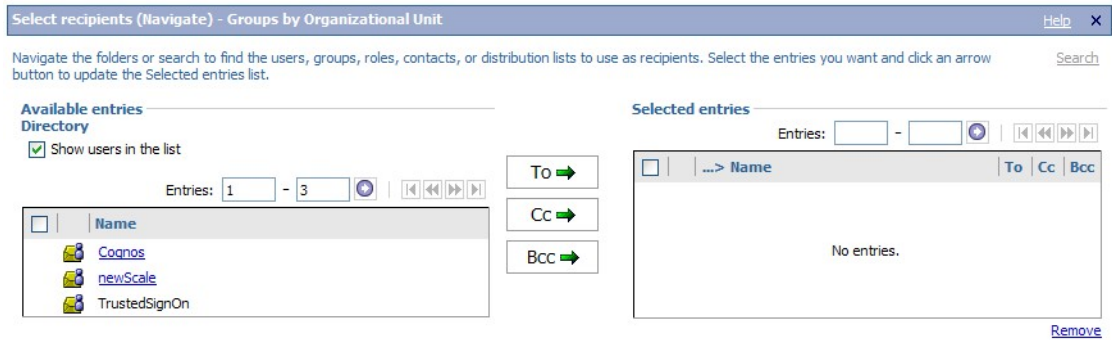


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The recipients may either be typed directly, separated by semicolons, or chosen from the list of reporting users. When choosing recipients:

- Click **Select the recipients**. The “Select recipients (Navigate)” page appears.

Figure 6: Select Recipients



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- Check **Show users** in the list then click on the **Service Catalog namespace** (directory) in the list of Available entries on the left side of the page.
- A list of roles (which have an associated reporting capability) and individual users (who have been granted one of those roles) appears in the Available entries column. You can browse through that list, choosing the recipients for the e-mail, then click To, Cc, or Bcc to choose those entries as recipients.

- Alternatively, to find a particular user, you can click the Search link at the top right of the page. The “Select recipients (Search)” page appears.

Figure 7: Select Recipients by Search

Select recipients (Search) - Groups by Organizational Unit Help X

Navigate the folders or search to find the users, groups, roles, contacts, or distribution lists to use as recipients. Select the entries you want and click an arrow button to update the Selected entries list. Navigate

Available entries
 Directory > newScale
 Find text in: Name field ▾

jared Search Advanced To CC BCC

Results: Entries: 1 - 1 Remove

<input type="checkbox"/>	Name
<input type="checkbox"/>	...> Jared Roberts (Jared Roberts)

Selected entries
 Entries: - Remove

<input type="checkbox"/>	Name	To	Cc	Bcc
No entries.				

Remove

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- Leave Name field as the Find text in: option; the other options (including description) do not work with the Service Catalog directory, nor do any of the Advanced options other than the default which is automatically in effect.
- Enter all or part of the person's first name, then click **Search**. All people matching the criterion specified appear and can be chosen as recipients.

Other Reporting Options

Other reporting options are available, for example, to allow reports to be delivered in other output formats such as PDF, HTML or Excel, or to schedule reports to be run on a regular basis. More information on these options can be obtained from materials on IBM Cognos.

Scheduling Reports

You can schedule reports to run at a time that is convenient for you, such as during off hours when demands on the system are low. You can schedule reports individually or in a group by using a job. You can schedule reports to run by minute, hourly, daily, weekly, monthly, or yearly.

You can also set a personal time zone preference to simplify report scheduling. Otherwise, you will always have to calculate when you need the report and map it to the server time zone. To set a time zone preference, click **Preferences** in the top right corner and then enter the desired time zone setting in the **Use the following time zone** field.

Only one schedule can be associated with each report or job. If you require multiple schedules for the same report, you can create report views and then create a schedule for each report view. Jobs have their own schedules, and these schedules are independent from report schedules.

After you create a schedule, the report or job runs at the time and date specified. You can then manage the properties of your schedules.

Prompts in Scheduled Reports

If a report that contains prompts is scheduled, you must save the prompt values or specify default values to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When a report runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the report. If no values are specified in the job definition, Cognos 10 uses the values saved in the report.

You schedule a report to run it at a later time or at a recurring date and time.

If you no longer need a schedule, you can delete it. You can also disable it without losing any of the scheduling details. You can then enable the schedule at a later time.

Cognos keeps history information and report outputs each time a report runs according to a schedule. You can specify how many occurrences to keep or for how long to keep them. For example, you can keep the history and report outputs for the ten latest occurrences or for schedules that ran in the last two months. Use the report history to see the times at which the reports ran and whether the reports ran successfully.

To schedule a report or report view, you must have read, write, execute, and traverse permissions for it. You also require the following access permissions to any data sources used by the report.

- dataSource Execute and Traverse
- dataSourceConnection Execute and Traverse
- (With only Execute access, you are prompted to log on to the database.)
- dataSourceSignon Execute

To schedule a report or report view:

-
- Step 1** Choose **Reporting > Public Folders** or **My Folders**, click the **schedule** button for the report you want to schedule.
- Step 2** Under **Frequency**, choose how often you want the schedule to run.
The Frequency section is dynamic and changes with your selection. Wait until the page is updated before choosing the frequency.
- Step 3** Under **Start**, choose the date and time when you want the schedule to start.
- Step 4** Under **End**, choose when you want the schedule to end.
Tip If you want to create the schedule but not apply it right away, check the **Disable the schedule** check box. To later enable the schedule, uncheck the check box.
- Step 5** Under **Formats**, choose the format you want for the report output.
- Step 6** Under **Languages**, click **Select the languages** to choose a different or additional language for the report.
Tip
- To choose multiple languages, press and hold the Ctrl key and click each language.
 - To choose consecutive languages, click the first language, press and hold the Shift key, and then click the last language.
- Step 7** Under **Delivery**, choose to save the report, print the report, or send the report by email.
You must choose at least one delivery method.
- Step 8** If you want to be prompted when you leave the Schedule page, under Prompt values, check the **Prompt for values** check box.

The values that you specify will be used when the report runs.

Note You will be prompted for values only if the report specification or model includes prompts or if you have access to more than one sign-on, even if the "**Prompt for values**" check box was checked.

Step 9

Click **OK**.

A schedule is created and the report will run at the next scheduled time.

Scheduling Multiple Reports at Once

You can set the same schedule for multiple reports by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the reports in the job run.

Jobs contain job steps, which are references to individual reports, jobs, and report views. You can specify whether to run the steps all at once or in sequence.

When the steps are run all at once, all the steps are submitted at the same time. The job is successful when all the steps run successfully. If a step fails, the other steps in the job are unaffected and still run, and the job has a Failed status.

When the steps are run in sequence, you can specify the order in which the steps run. A step is submitted only after the preceding step runs successfully.

The individual reports, jobs, and report views in steps can also have individual schedules.

To schedule a report or report view, you must have read, write, execute, and traverse permissions for it. You also require the following access permissions to all data sources used by the report.

- dataSource Execute and Traverse
- dataSourceConnection Execute and Traverse
- (With only Execute access, you are prompted to log on to the database.)
- dataSourceSignon Execute

To schedule multiple reports at once:

- Step 1** Choose **Reporting > Public Folders or My Folders**, click new job.
- Step 2** Type a name and, if you want, a description and screen tip for the job, choose the destination folder in which to save the job, and then click **Next**.
The "Select the steps" page appears.
- Step 3** If you want to specify run options for all the steps and set them at the job level, under **Job Options**, click **Set**. Choose the format, language, and bursting options, and then click **OK**.
- Step 4** Choose the job steps.
- Step 5** Below the steps list, click **Add**.
- Step 6** Check the check box next to the reports you want to run.
- Step 7** Click **Add** and click **OK**.

Tip Click **Select all** to choose all the reports in the current folder.

Step 8 If you want to specify run options for the individual steps, under **Step options**, click **Set**. Choose the format, language, prompt and burst options and then click **OK**.

Step 9 Under "Submission of steps", choose whether to submit the steps All at once or In sequence. If you choose "In sequence", the steps are executed in the order they appear in the Steps list.

Tip To change the order, click **Modify the sequence**, make the changes, and click **OK**.

Step 10 Click **Next**.

Step 11 Choose whether you want to save, print, or send the report by email. You must choose at least one delivery method.

Step 12 Click **Next**.

Step 13 Under Frequency, choose how often you want the schedule to run. The Frequency section is dynamic and changes with your selection. Wait until the page is updated before choosing the frequency.

Step 14 Under Start, choose the date and time when you want the schedule to start.

Step 15 Under End, choose when you want the schedule to end.

Tip If you want to create the schedule but not apply it right away, check the Disable the schedule check box. To enable the schedule, uncheck the check box.

Step 16 Click **Finish**.
A job is created and will run at the next scheduled time.

Scheduling a Report Based on an Event

You can schedule a report based on an event, such as a database refresh. You specify an event to act as a trigger. When that event occurs the report runs.

The trigger event is specific to your implementation and must already be defined using the Cognos 8 Software Development Kit (SDK). For information about the trigger events defined in your organization, contact your developer.

You can also schedule a report to run at a specific time.



Note

To schedule a report or report view, you must have read, write, execute, and traverse permissions for it. You also require the following access permissions to all data sources used by the report.

- dataSource Execute and Traverse
- dataSourceConnection Execute and Traverse
- (With only Execute access, you are prompted to log on to the database.)
- dataSourceSignon Execute

To schedule a report based on an event:

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- Step 1** Choose **Reporting > Public Folders** or **My Folders**, click **Set properties** next to the report you want to schedule.
 - Step 2** Click **Run** options.
 - Step 3** Under **Formats**, choose the format you want for the report output.
 - Step 4** Under **Language**, specify the language for the report.
 - Step 5** If you want to filter the items, under **Prompt values**, specify specific values to filter the data that appears in the report.
 - Step 6** Under **Run as the owner**, choose whether to run the report as yourself or as Anonymous.
 - Step 7** Under **Event name**, specify the name of the event.
 - Step 8** Under **Event description**, type a short description of the event.
 - Step 9** Click **OK**.
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