Schedules

Center for Data, Analytics and Reporting

Logging In

1. Navigate to https://cedar.princeton.edu
2. From the **IW & Tools** tab, click **Enter the Warehouse**
3. Enter your **NetID** and **Password**

Whether you need to run your report on a daily basis or only every so often, the Scheduling Tool in Cognos Analytics makes it possible to schedule your reports to run automatically, as frequently as you need.

Who Can Schedule?

Are you the Package Custodian?

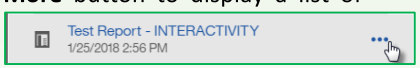
Yes	No
1. Create a Report View 2. Save it to a location in **Team Content**	1. Create a Report View 2. Save to **My Content**

Why Create a Report View?

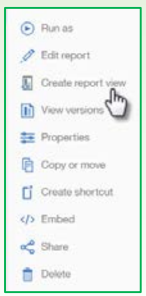
- Keeps the original report intact and pristine
- The 'original' report can only be scheduled one time
- You can schedule multiple report views of the same report
- Each report view can have its own unique schedule, frequency, distribution, and delivery options

How to Create a Report View

1. Navigate to and hover over the report for which you would like to create a schedule.
2. Click the **More** button to display a list of options.

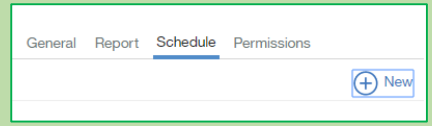


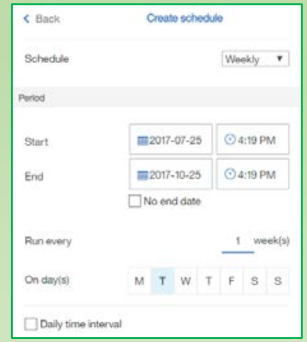
3. Select **Create Report View**.
4. Navigate to the location you would like to save the report view to and click **Save**.



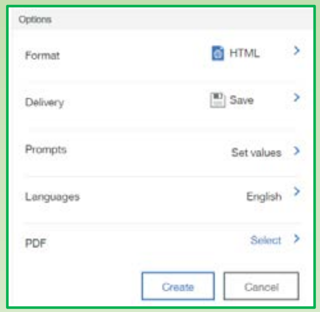
Create the Schedule

1. Navigate to the **Report View** you would like to schedule.
2. Click the **More** button and then select **Properties**.
3. Click the **Schedule** Tab and then click **New**.
4. Enter appropriate criteria in the top half of the Schedule Creator.





Once you have chosen how often you would like your schedule to run, pay special attention to the options that follow.



- **Format**: Choose from a list of output types
- **Delivery**: Choose to send report by email, print the report, or save the report.
  **see additional details below*
- **Prompts**: Set or clear prompt values
- **PDF**: Choose the layout and password protect a PDF.

Send Report by Email

You have the ability to email the output of the schedule to a mass distribution.

1. Place a checkmark in the box next to **Attach the Report** (especially if your report is scheduled out of **My Content**, since only you have access to the contents of this location)
2. Provide email addresses in the **To:**, **cc:**, and **bcc:** fields as appropriate.

If you need help, click the arrow next to the **To:** field, choose a **Namespace** to search from and type in the recipients name or part of their NetID. Use the **Filter**, if needed. Then click **Add**.

3. Modify the subject line, if appropriate.
4. Place a checkmark in the box next to **Include a link to the report**, if necessary.
5. Provide a message in the **Body** of the email.
6. Click **Done**.
7. Click **Create**.

*Note: If you would like to schedule the report to be sent only to yourself, use the new **Subscribe** feature!*

*See Reverse

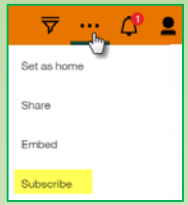
Subscriptions & Notifications

Center for Data, Analytics and Reporting

Subscriptions

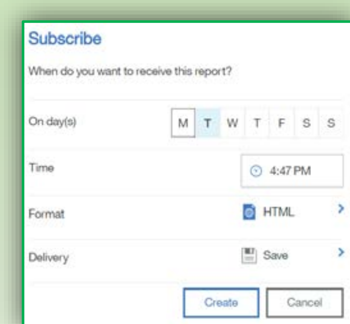
End user schedules are now called subscriptions. Subscriptions are a new mechanism available once a report has been run which allows the user to quickly schedule a personal copy of the report.
Subscriptions are implemented using report views, which are created upon setting up the schedule for your subscription. Each time the schedule runs the report, a notification is created.

Subscribing to a Report



1. Open/Run the report you want to subscribe to.
2. Click the **More** button.
3. Click **Subscribe**.

The Schedule Creator will open up prompting you for information around how and when you would like to receive your report.



4. Choose the day(s) of the week you want your report generated and/or sent.
5. Choose the time of the day you want the report generated and/or sent.
6. Choose the appropriate format of the report.
7. Choose the type of delivery for the report.

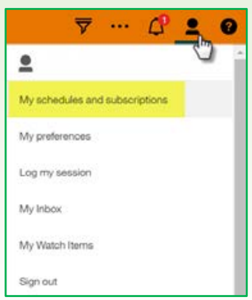
Note: You can choose more than one option for the format and delivery method in steps 6 and 7.

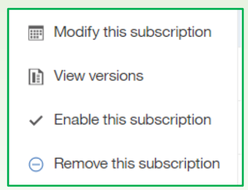
You have now scheduled a report to be sent, saved, and/or printed and it will run based on the schedule you created. Each time the report runs, you will receive an alert under **Notifications** on application toolbar.

My Subscriptions

To see a list of all the reports you've scheduled, click the **Personal Menu** button and then choose **My Subscriptions**.

To modify or delete your subscription, find and click the **more** button at the end of the row beside the report.





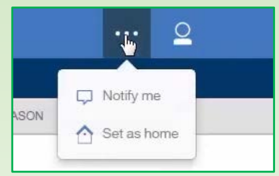
Notifications

Notifications can help you stay on top of important data. A notification is the ability to receive an alert of a previously saved report in which the output has been updated. If you subscribe to a report or report view, you are notified every time your subscription is delivered.
Notifications are indicated on top application toolbar and shown as a numerical value.

Notify Me

A user cannot subscribe to a report when viewing a saved report output. However, on a saved report output, a notification can be enabled that will warn the user when a new version is available. If you typically view saved output and you want to be notified anytime there's a new version of a report, you can tap the **Notify me** button.

1. From the Application Toolbar, click the **More** button.
2. Select **Notify Me**.



Stop Notifying Me

If you would like to stop receiving notifications:

1. From the Application Toolbar, click the **More** button.
2. Select **Stop Notifying Me**.