Princeton University

Create a New Job to Run Reports on a Recurring Basis

CeDAR - Center for Data Analytics & Reporting
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Instructions for using Cognos to create a new job to run on a recurring basis.
You may run the job to a selected file system if you have access to the file system.

The steps below outline how to create a Cognos job, to run a report or reports on a regularly scheduled basis (daily, weekly, monthly). You may also direct the job to deliver the output data to a selected file system outside of Cognos.

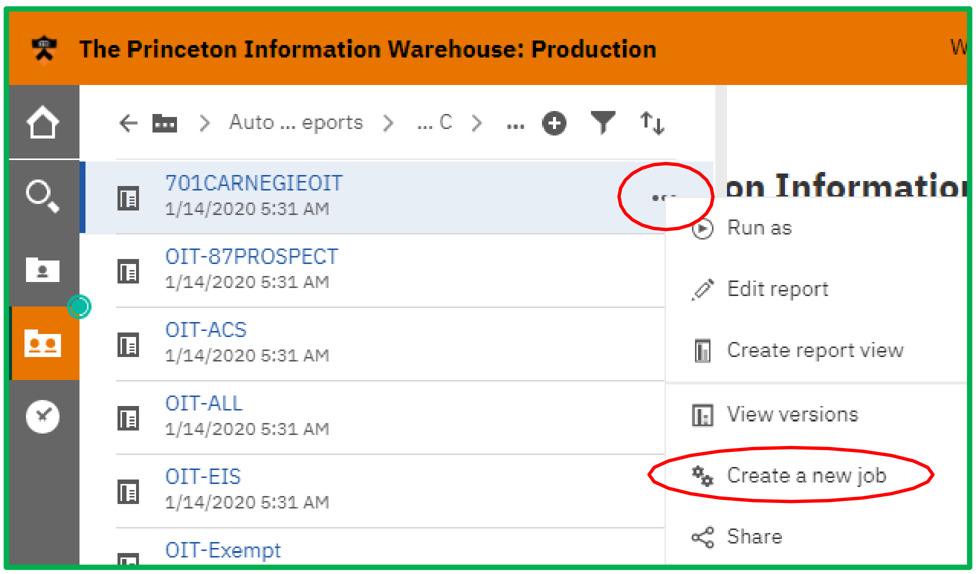
Scheduling Reports and Jobs

Running Multiple Reports within a Job: You may run multiple reports within a job. All the reports must be located in the same folder as the job to do this.

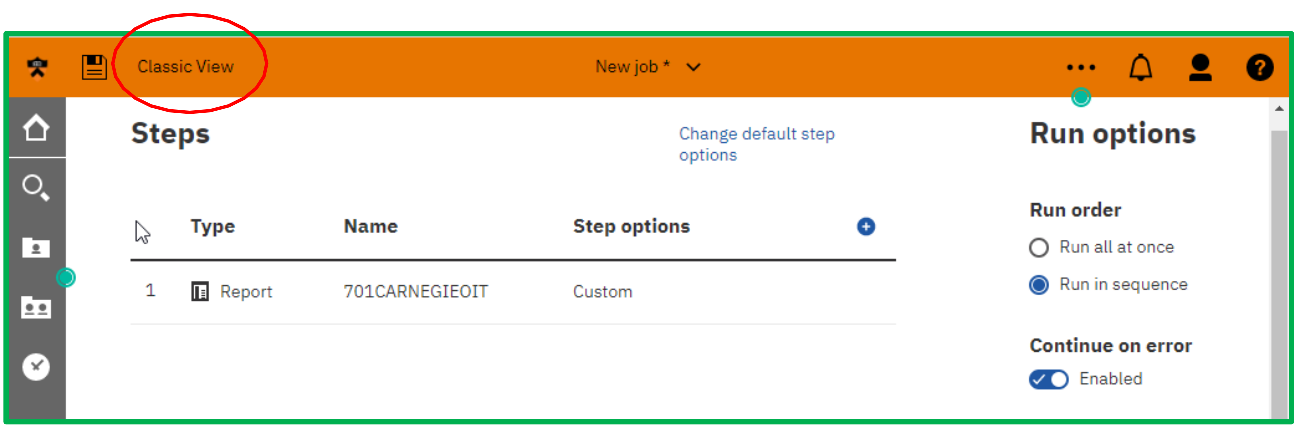
Running Multiple Jobs within a Job Schedule: If a schedule exists with jobs that run nightly and you want your new job to be included in that run schedule, follow the steps below to create the job, and then add your new job to the existing jobs schedule, after the new job has been created.

Create a New Job

1) Go to the location of the report(s) that you would like to add to the new job.
   To the right of the report name right click on the **More (…)** button and select the **Create a new job** icon from the pull-down menu.

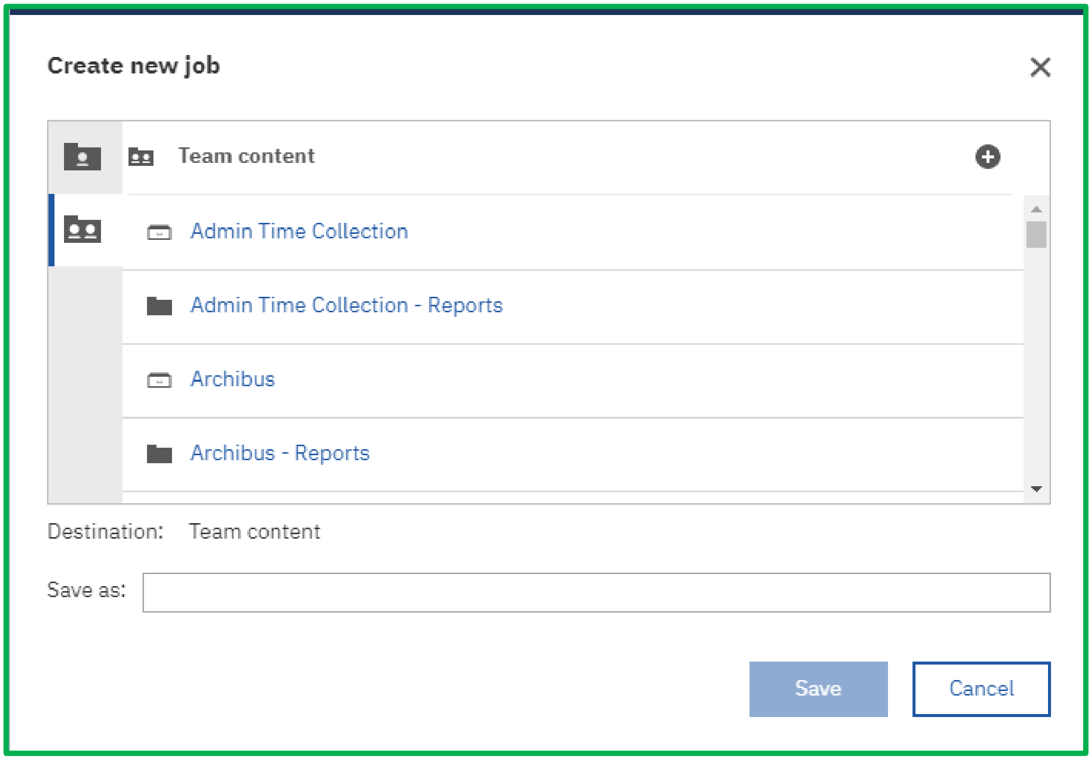


2) **The New Job** window opens. Select **Classic View** from the top left Orange toolbar.

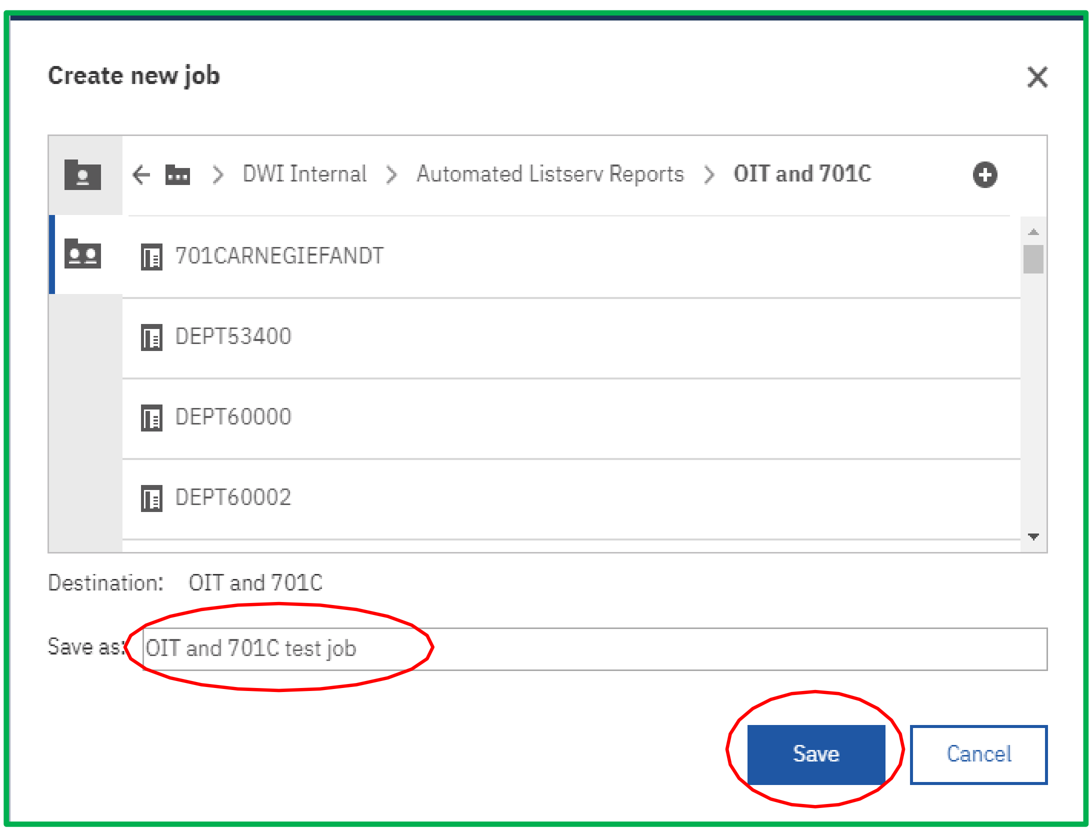


3) The **Create new job** window opens.

4) Navigate to the location of your report(s). The job needs to be located in the same folder as the report(s) that will run in the job.



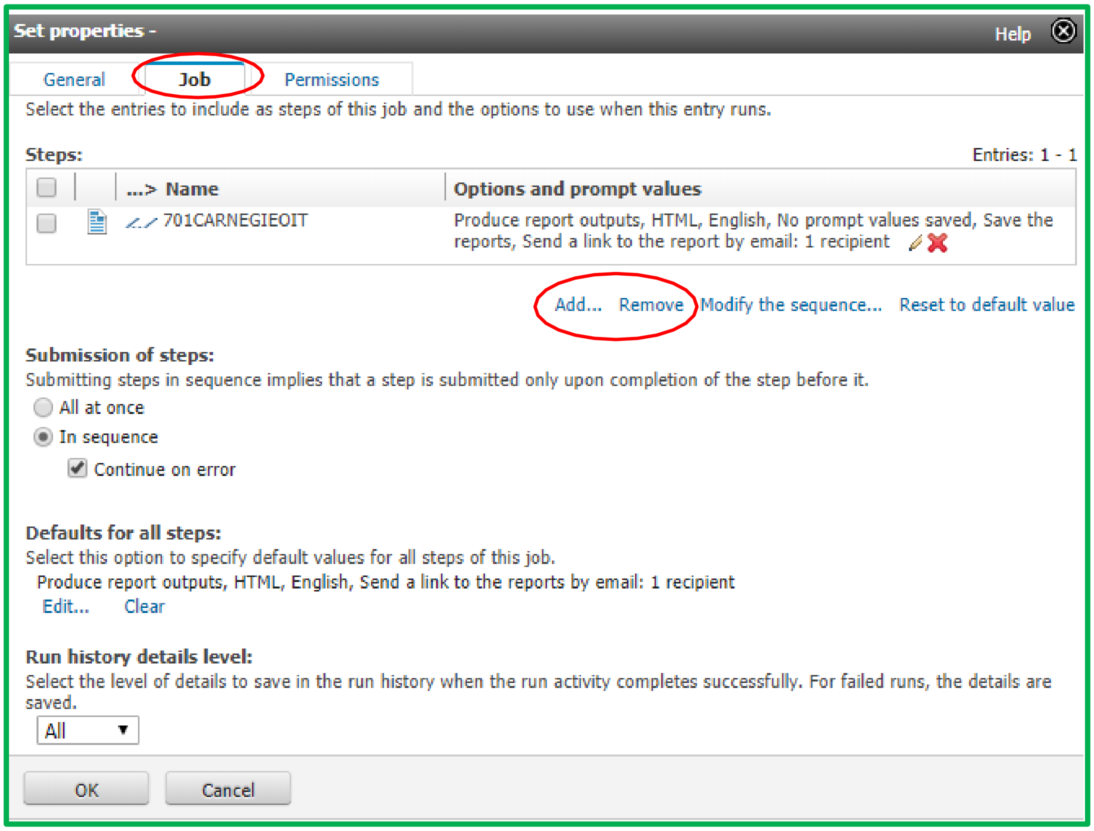
5) **Name** your job. **Save** the new job.



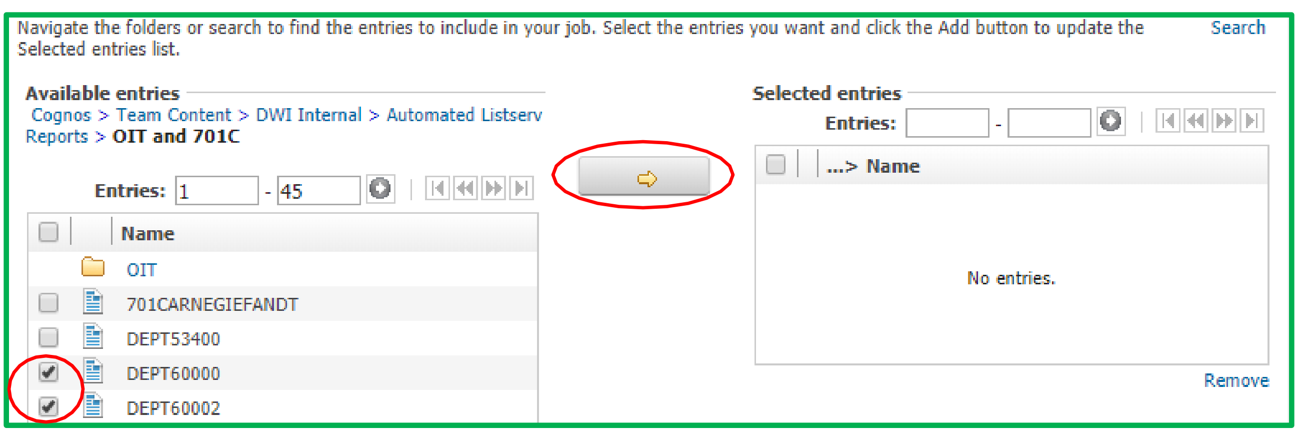
6) The **Set properties** window opens with the **Job** tab activated. In the **Steps** window you can see the report(s) that will run in this job. The list will change as you add or delete reports from this job.

Add or Remove Reports from the Job

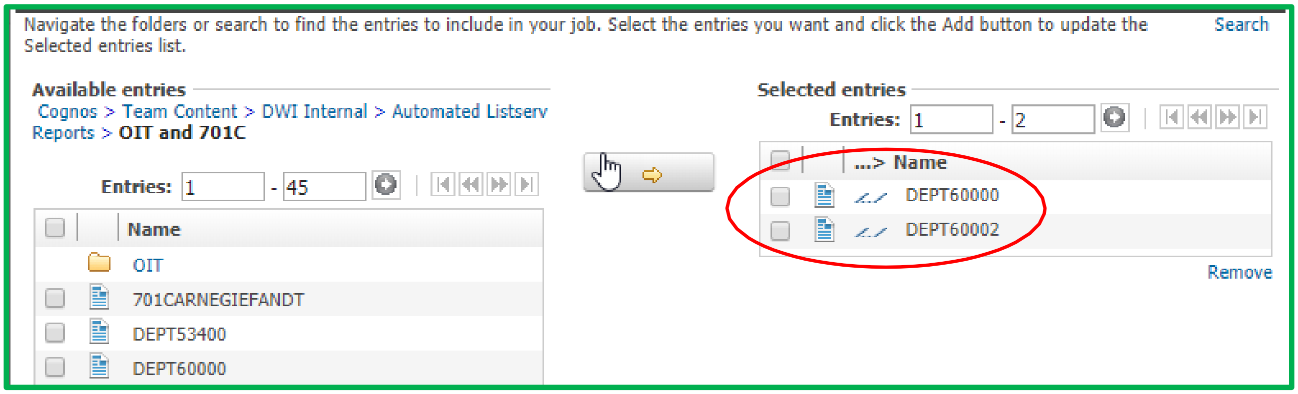
1) From this tab you can **Add** reports to or **Remove** reports from this job.



2) When you click **Add** the **Available entries** window opens listing the reports and other objects within the new **Job** folder.
3) Check to box to the left of the report name to select it. When ready click the yellow arrow in the middle of the window to add the selected reports to the **Selected entries** window.

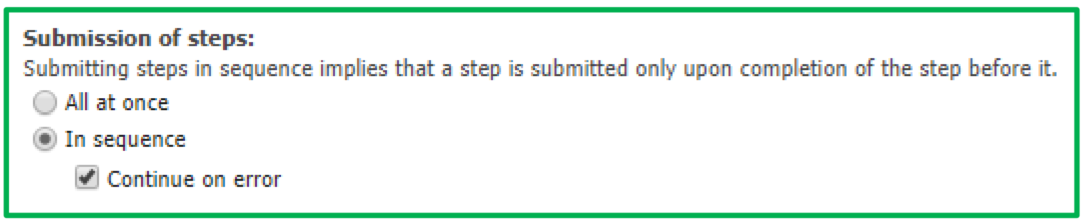


4) The selected entries will appear in the right hand window.
Select **OK** to complete the addition(s).
If your report list is long this may require scrolling to the bottom of the window.

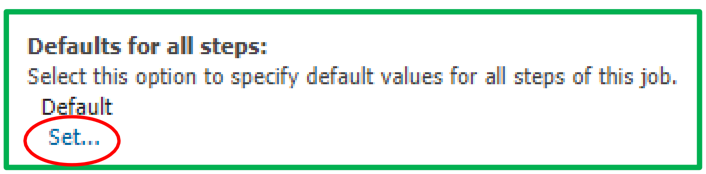


Job Tab Options

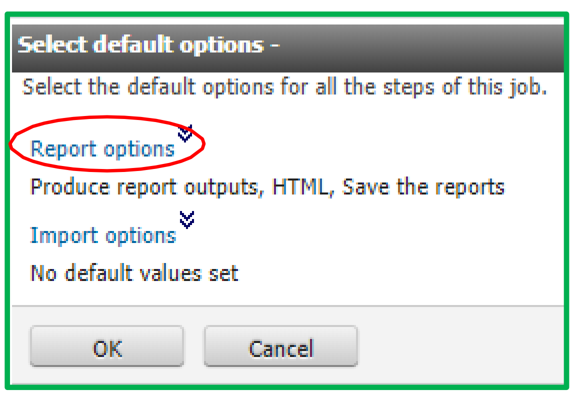
5) You will return to the **Job** tab.
6) Under the **Steps** window view your **Submission of Steps.**
In sequence and **Continue on error** are the default settings, which we accept.



7) Under **Defaults for all steps** select **Set.**



8) The **Select default options** window opens.
9) Select **Report options**.

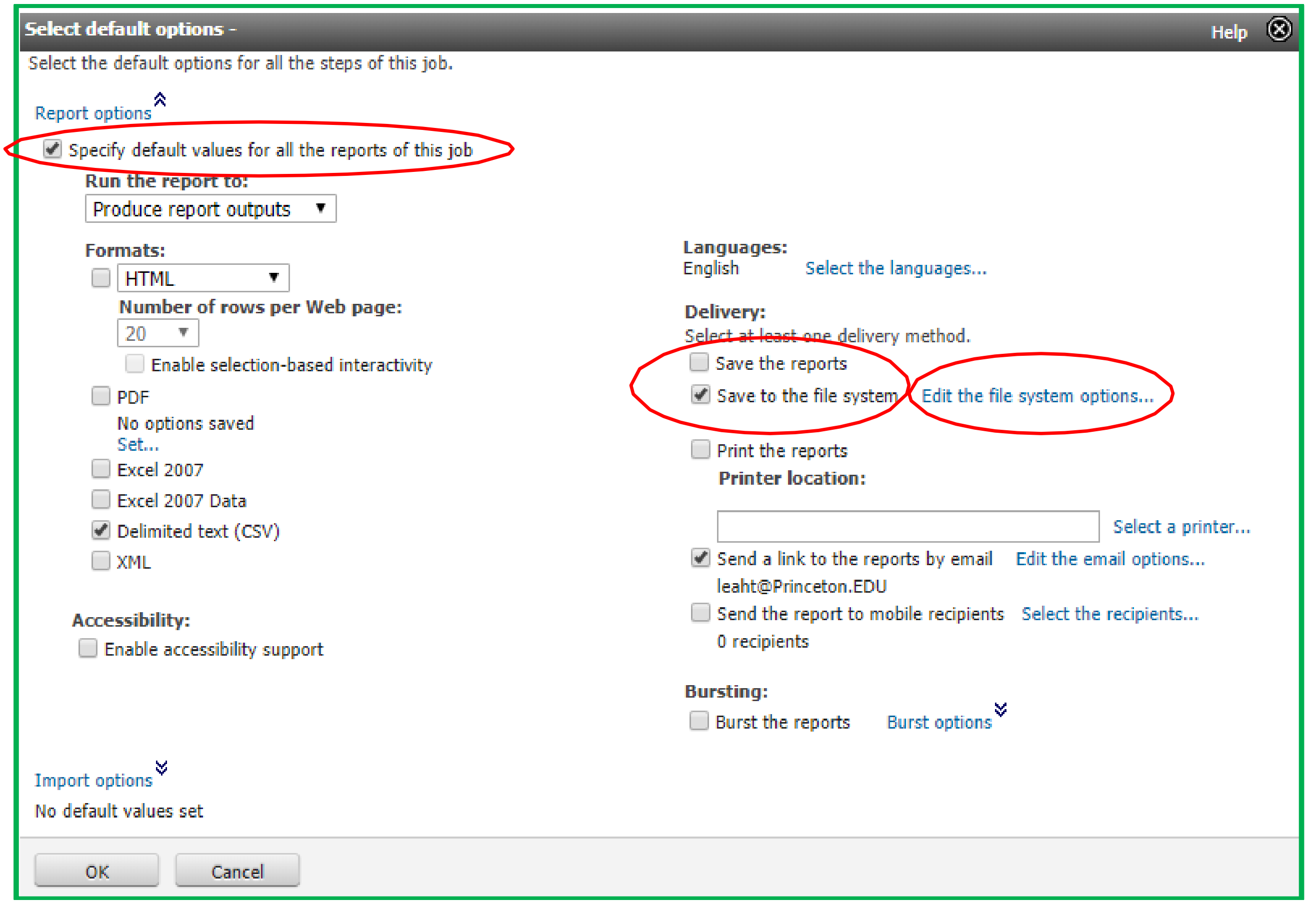


Select Default Options

1) Select **Specify default values for all the reports of this job.**
   Report options now appear in this window.
2) **Formats:**
   HTML is the default selection.
   Select your preferred report format.
   De-select **HTML** if you do not want that format.

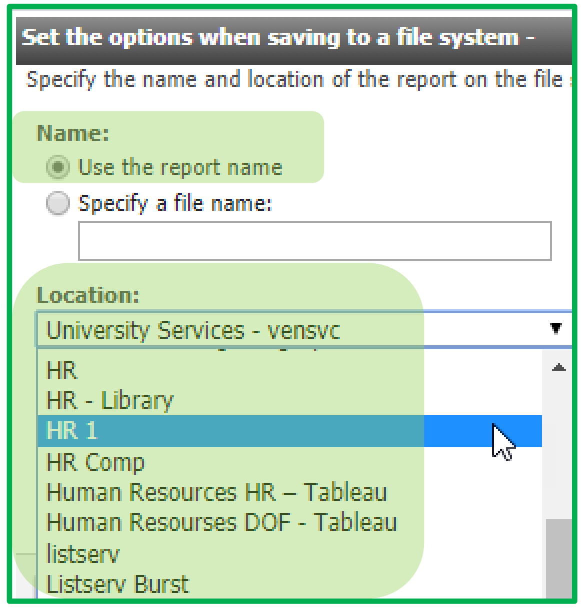
3) **Delivery:** If you want to save to a file system.
   Uncheck **Save the reports**.
   Select **Save to the file system**.

4) Click on **Edit the file system options.**

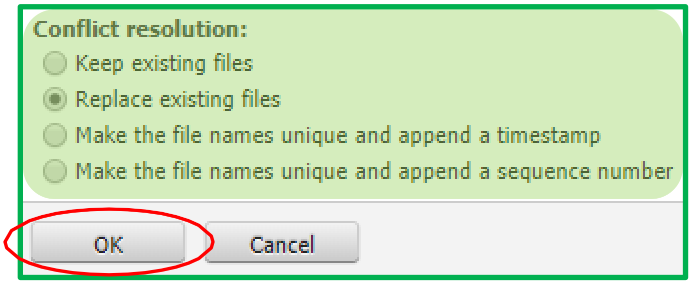


Select File System Location

The **Set the options…** window opens.
Name: Default is **Use the report name**.
Location (from the pull-down menu):
Select the option that fits your reporting needs.
File system(s) appear in the pull-down menu as a selection if you have been given access to that system(s).

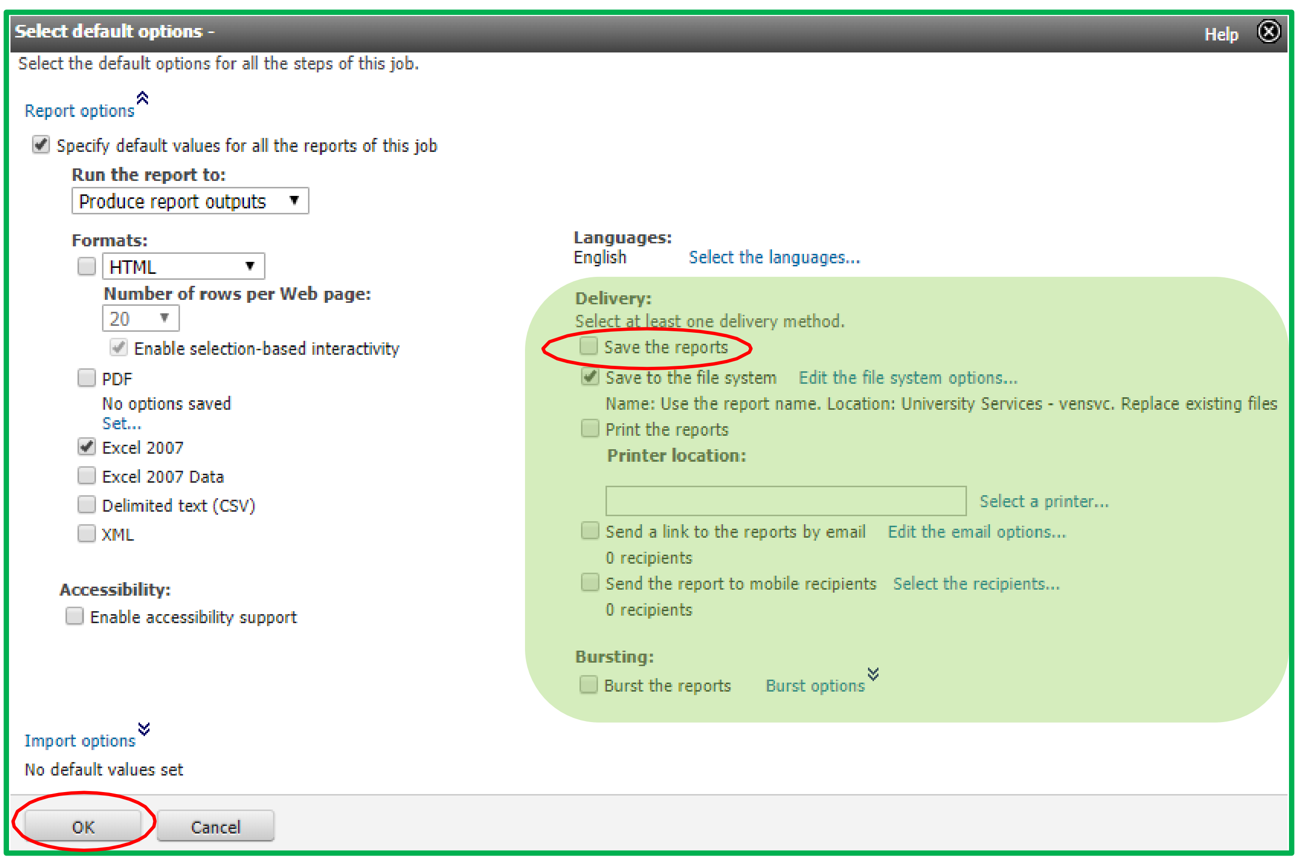


5) **Conflict resolution**: keep the default or select the option that fits your reporting needs.
6) Click **OK** when ready.

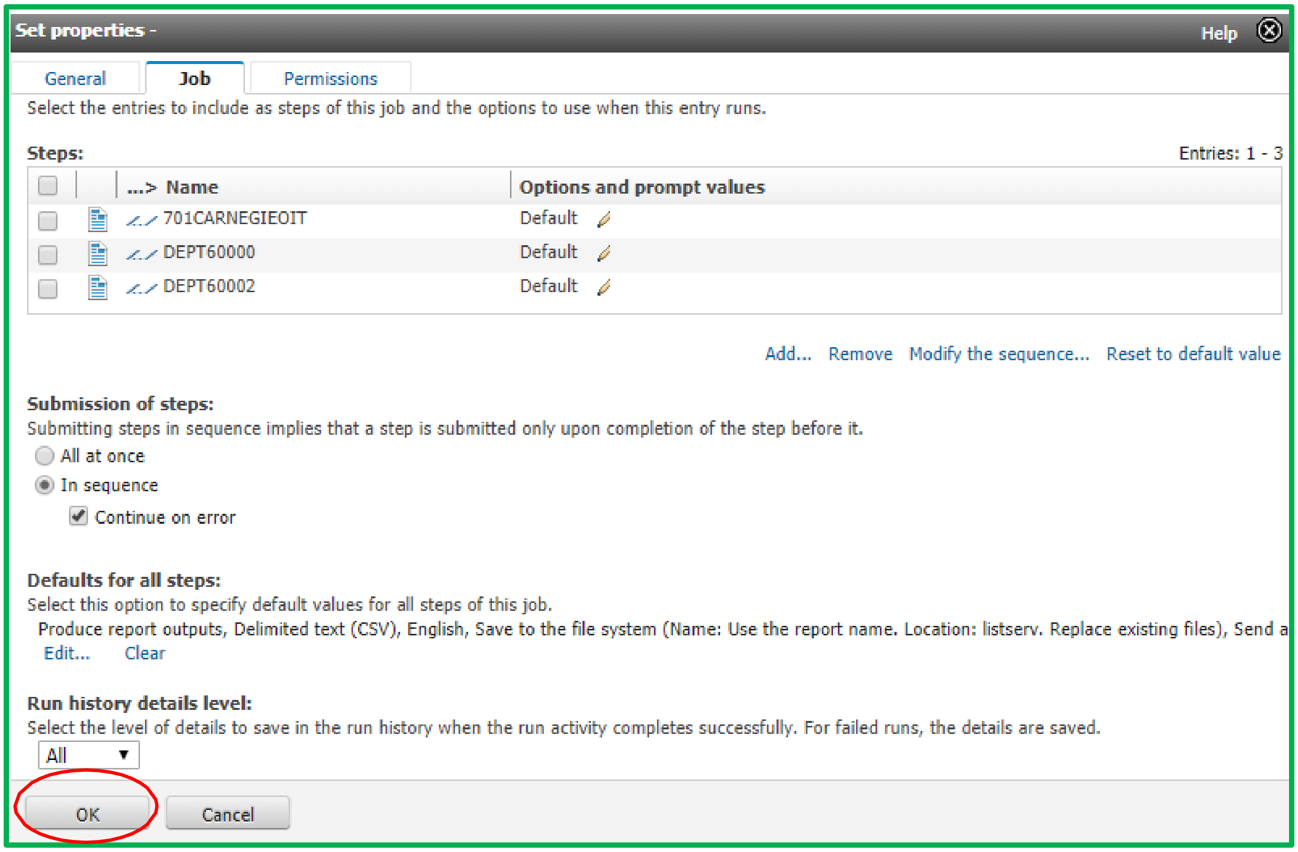


Set Delivery Options (other that Save to the file system)

7) You return to the **Select default options** window.
In the second column you can select **Languages**, your **Delivery** mode, and **Bursting** options.
Under **Delivery** you can: **Save the reports, Save to the file system, Print the reports, Edit your email options** or schedule **Bursting**.
When selecting options other than **Save to the file system**, you must check **Save the reports**.
If you forget to do so, you'll see an error message asking you to **Save the reports**, before the system accepts your selections.
8) When ready click **OK** to accept your selections and return to the **Set properties** window.

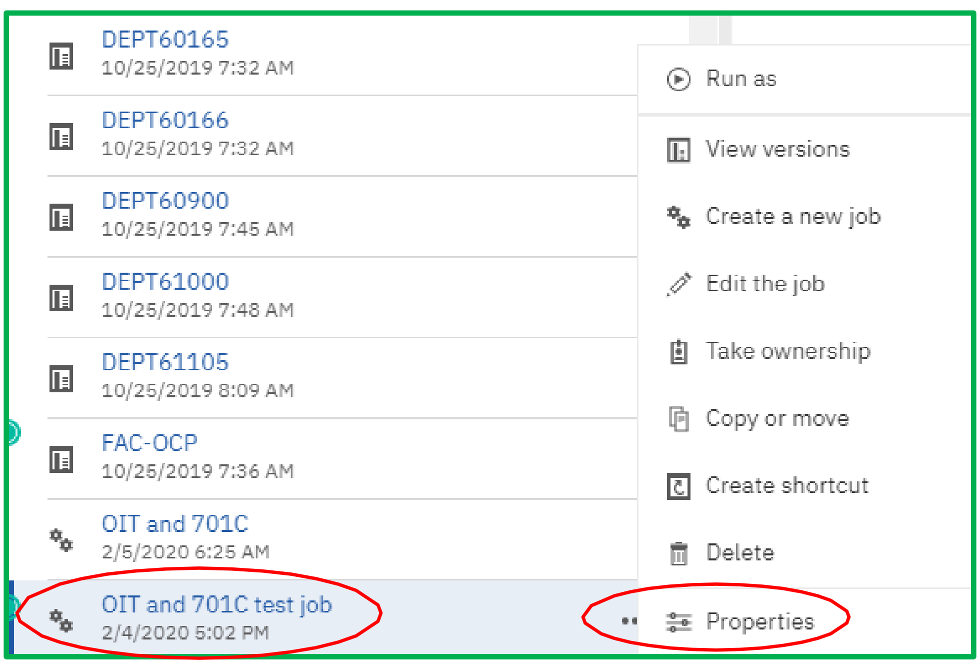


9) Click **OK** in the **Set properties** window to accept your job settings.

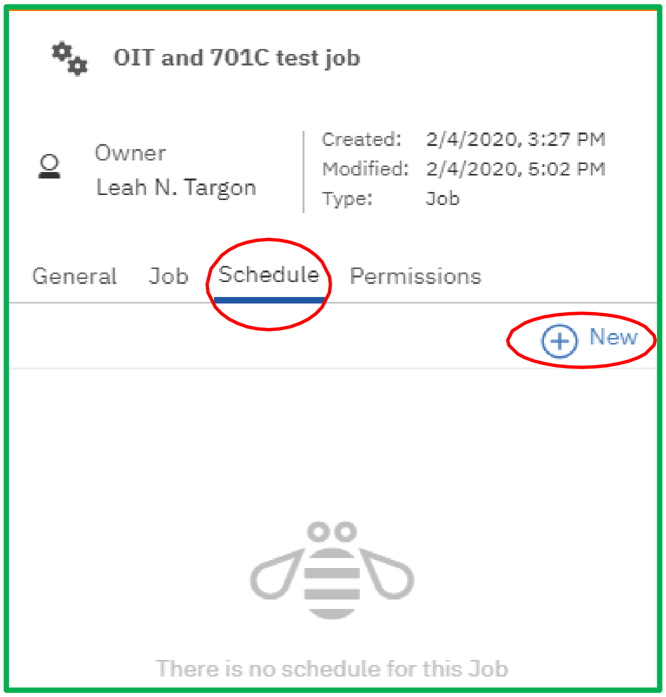


Schedule the New Job

10) Navigate to the **Job** and select **Properties** from the **More (...)** pull-down menu.



11) The fly-out window opens with tabs for **General, Job, Schedule** and **Permissions.** Select the **Schedule** tab. Click **New** to create a new schedule.



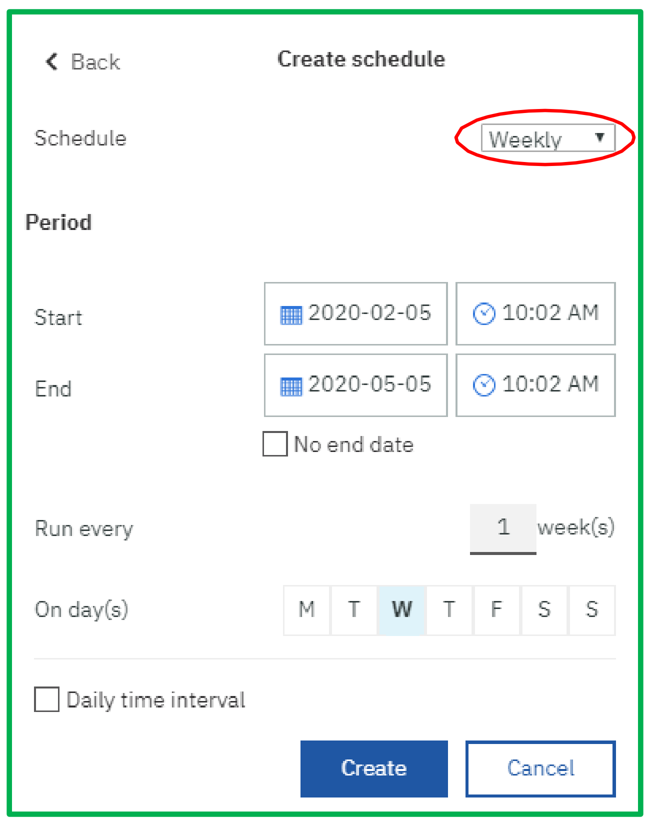
12) The **Create schedule** fly-out window opens. The default is to run on a **Weekly** basis.

Schedule: You can set the schedule to run the job **Daily**, **Weekly**, **Monthly**, **Yearly**, or **By trigger**.

Period: You can set your **Start and End dates and times** to run the report, or you can set **No end date**.

Frequency: Based upon the chosen schedule, i.e. daily, etc. you can then select one or more days per week that you run the report.

Daily time interval: The default setting is unchecked. You can schedule the report to run at hourly intervals throughout a given time period during the day.

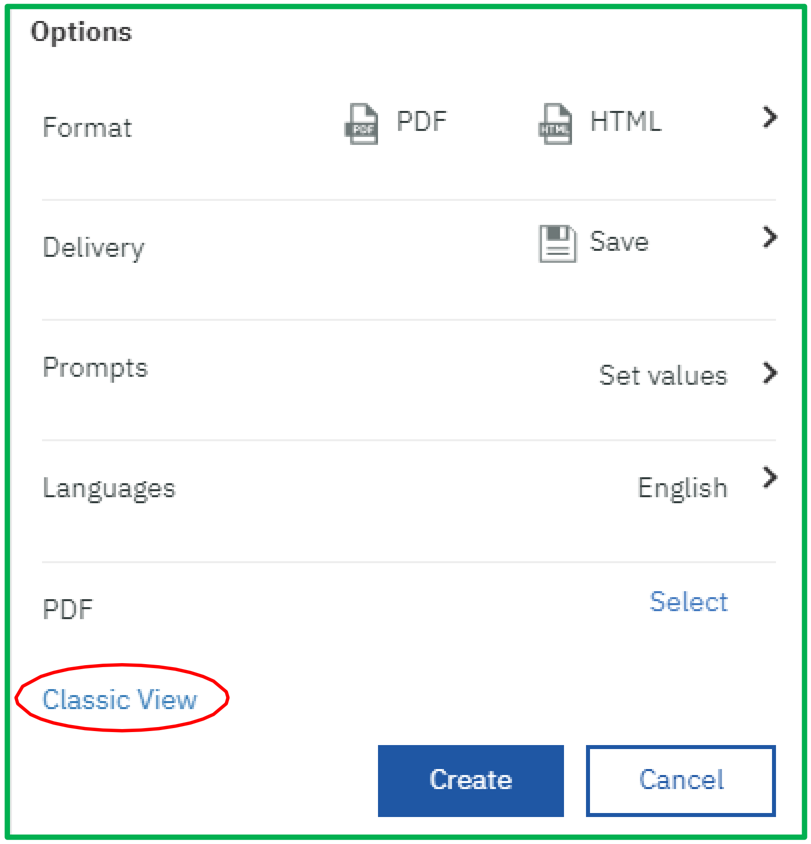


Schedule Options Window

13) If you prefer not to work in the **Classic View** window you can also select your report **Options** here.

    You can also access the **Classic View** from this location.

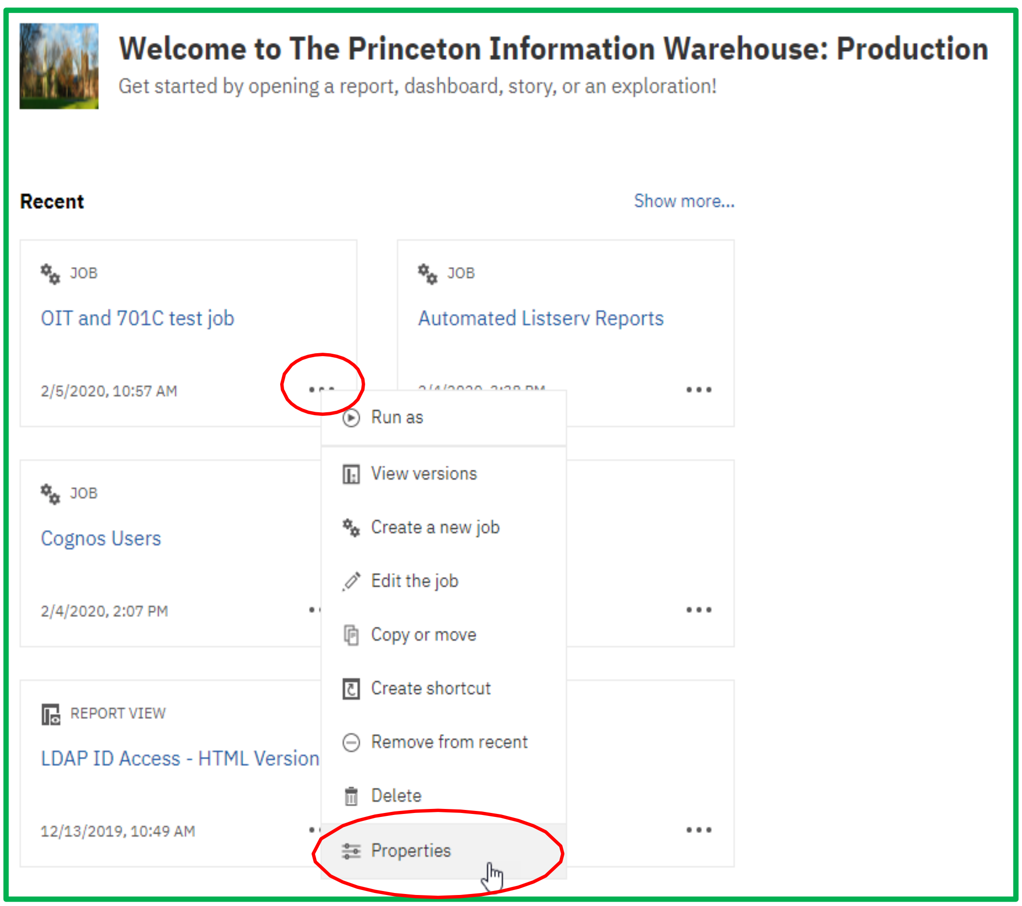
14) Select **Create** when ready to create your schedule.



Disable or Hide the Job

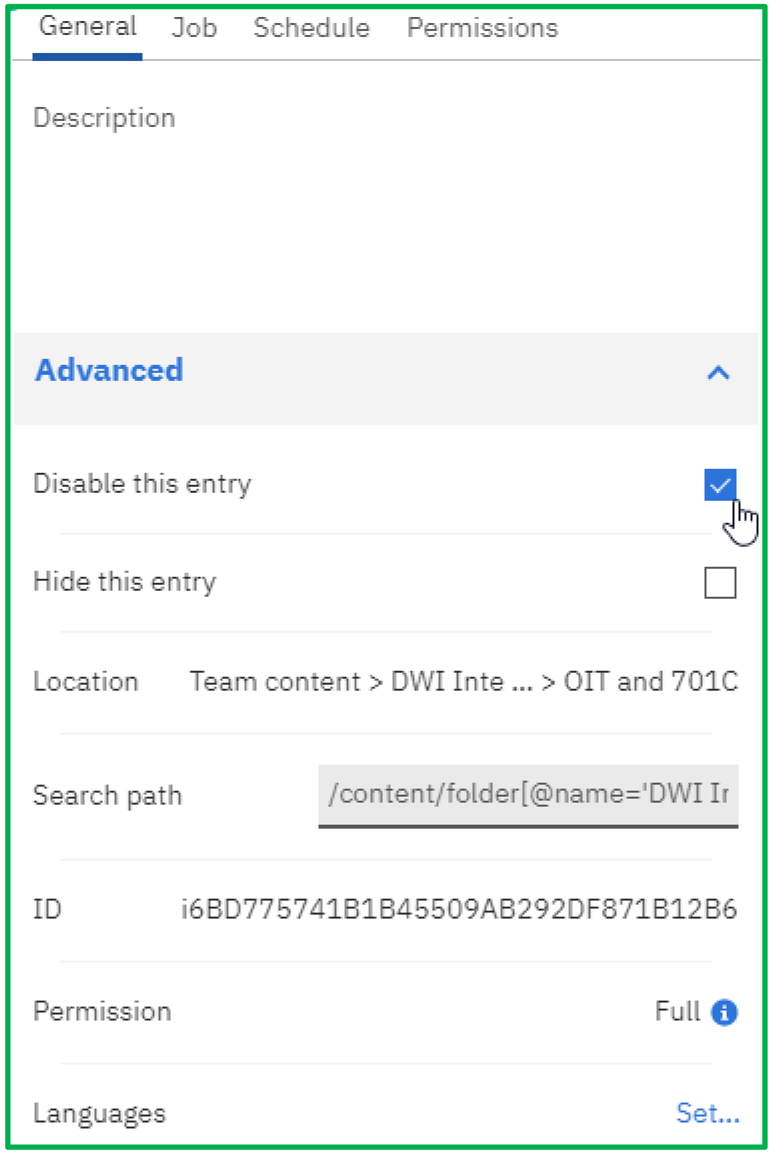
You can **Disable**, or **Hide** a job if you decide you do not want to run it, yet, you want to keep it, and not delete it.

1) Navigate to the job name on the **Welcome** page or via **My Content**.
2) Select **Properties** from the **More (...)** pull-down menu.



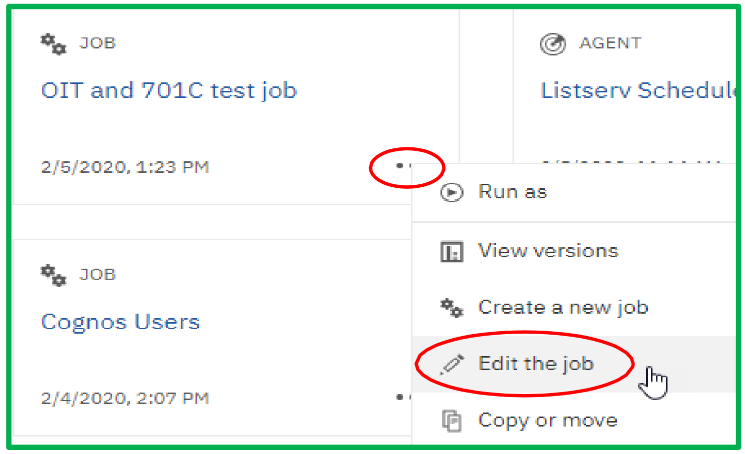
The **Properties** fly-out window opens.
There are tabs for **General**, **Job**, **Schedule**, **Permissions**.
Each tab has an **Advanced** window.
Explore these tabs and the **Advanced** windows in each tab to see the functionality and options available for scheduling your report(s) and job.

3) In the **General** tab open the **Advanced** area.
4) You can select **Disable this entry** or **Hide this entry**.

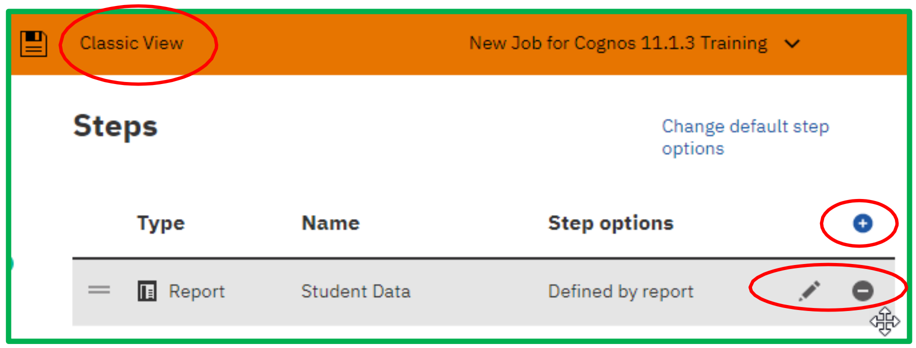


Adding or Removing a Report from an Existing Job

Sometimes you need to add or remove a report from an existing job.



1) Navigate to the job name on the **Welcome** page or via **My Content**.
2) Select **Edit the job** from the **More (…)** pull-down menu.
3) The **Steps** page opens.
4) To the right of the **Report** name you can **Edit** or **Delete** the report from the **Job**.
5) If you click the **Blue Plus Sign** you can navigate to a **Report** to add it to the **Job**.
6) Select **Classic View** in the top left of the orange toolbar to make the same changes to your **Job**.
7) The **Job** tab in the **Set properties** window opens. It shows the reports in your job.



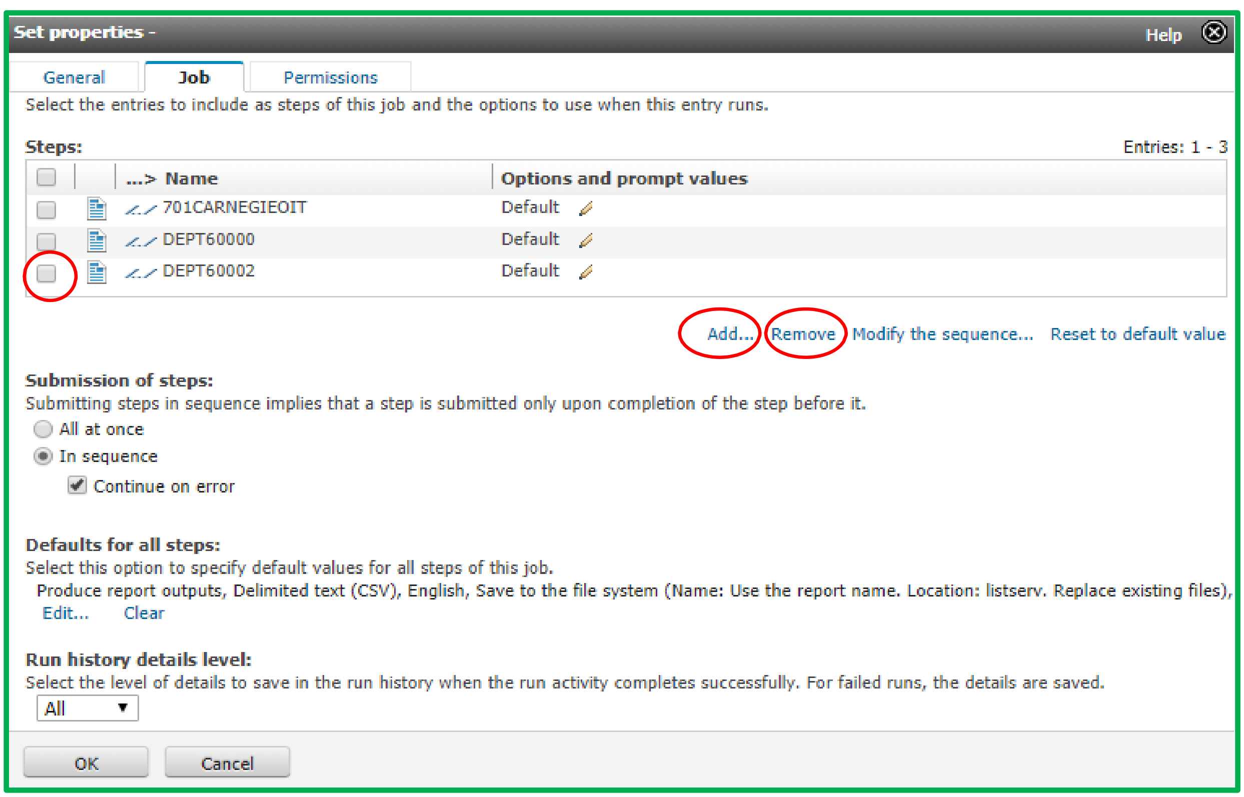
Add a Report to an Existing Job

Best Practice: Keep the **Job** in the same folder as the **Report(s)** in the **Job**.

1) Click the **Add** button below the list of reports.
2) The **Available entries** window opens. Select the report(s) you want to add, click the **yellow** arrow to add it to the **Selected entries** window. Scroll down if you need to and click the **OK** button. You'll be taken back to the **Set properties** window and should see your new report added to the report list under **Steps.**

Removing a Report From an Existing Job

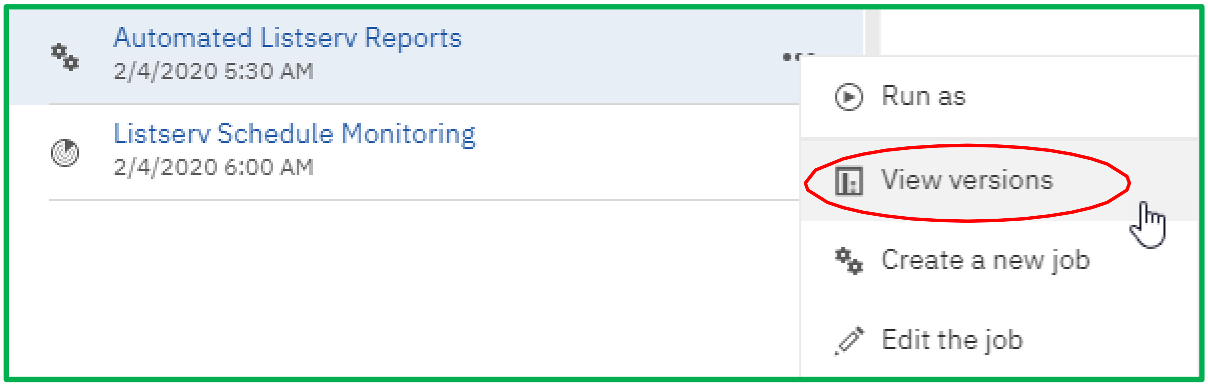
1) Check the box to the left of the report you would like to delete.
2) Click the **Remove** button below the list of reports. The report is immediately removed.
3) Select **OK** to accept the changes. Select **Cancel** if you change your mind.



How to Check When a Job Has Run

You can check to see when a job runs, and if it has run successfully or failed.

1) Navigate to the job name and select **View versions** from the **More (…)** pull-down menu.



2) The **Versions** window opens. You can view **Versions** and **Archives**.
Select **Show all history** to see the most recent versions of the job.

A check mark next to the date the job ran indicates the job ran successfully.
A red exclamation point in a circle next to the date the job ran indicates that the job failed.
You can open the details panel to review what happened when the job ran.