

Princeton University

# Creating and Automating Cognos Listserv Reports

CeDAR - Center for Data Analytics & Reporting  
Leah N. Targon  
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Instructions for using Cognos to create a report which will populate a given OIT  
Listserv with current and accurate email addresses.

This documentation can also be used to run reports to different file system  
directories that a user has been given access to in Cognos.

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A Listserv’s population can be manually maintained through the Listserv application.  
A Cognos report using data from the Warehouse, can automatically populate a listserv.

The steps below outline how to create a Cognos report, capture the data needed for the listserv or other file system, create a new job, or add the report to an existing job, to automatically update a given Listserv population.

### Cognos PROD Report

- 1) Listserv reports can currently be found within the requesting department’s package.  
Recommended: keep the listserv reports and related job(s) within a listserv folder.
- 2) Report name = listserv name (exactly)
  - a) Create new listserv report. Include all data and counts to confirm the correct population.
  - b) 1<sup>st</sup> column must be **EmpID**
  - c) Once the report is ready it needs to be scheduled on a nightly basis.  
Add the report to a new or existing job.

## Scheduling Reports and Jobs

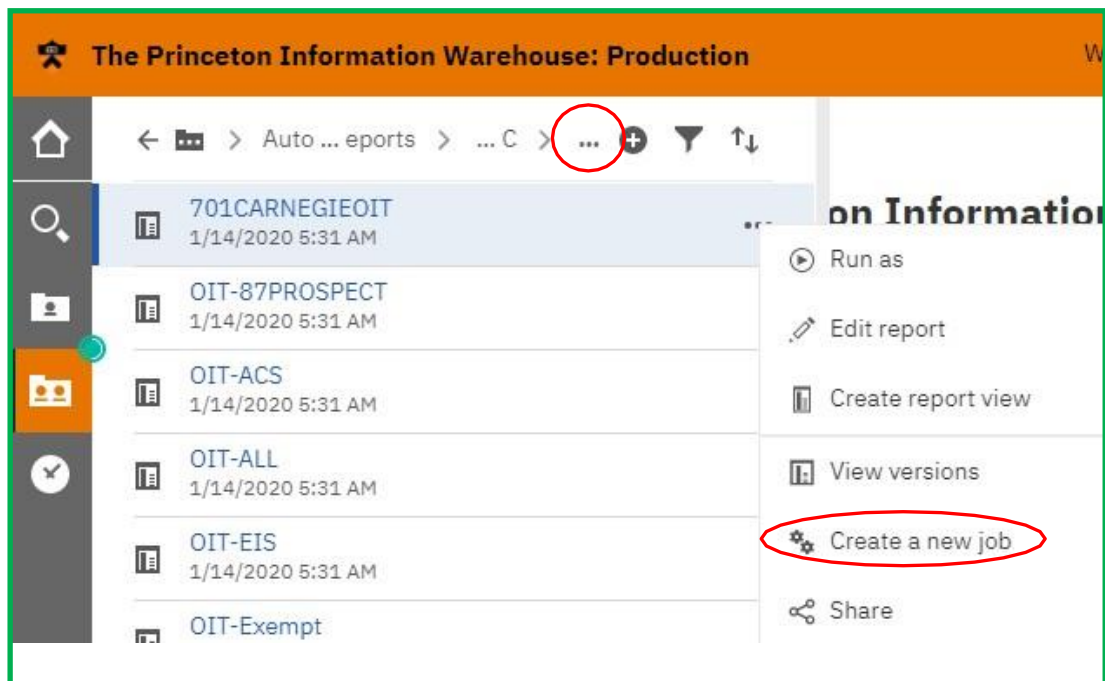
Note: Schedule your job to run nightly **before 5pm** so the most current data is available the next day!

**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.

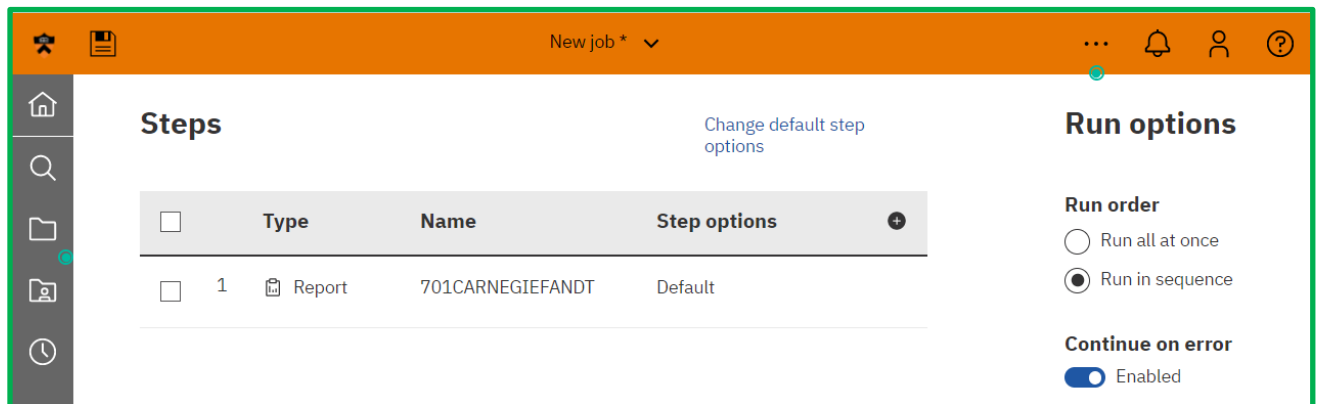
**Running Multiple Jobs within a Job Schedule:** If a schedule exists with jobs that run nightly and you want your new job to be included in that run schedule, follow the steps below to create the job, and then add your new job to the existing jobs schedule, after the new job has been created.

### Create a New Job

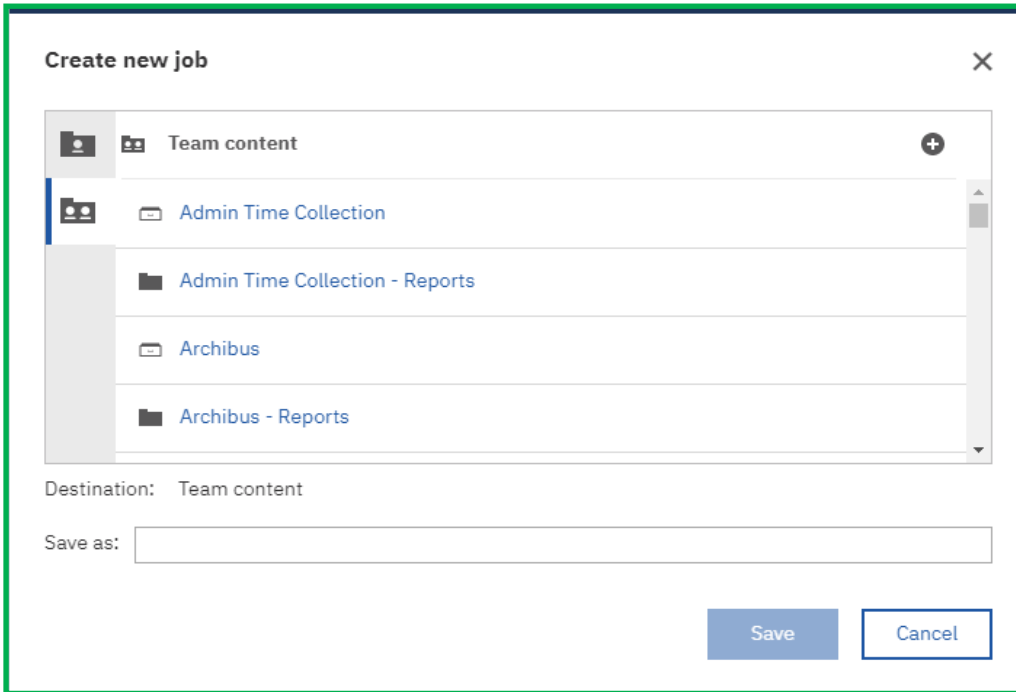
- 1) Go to the location of the report(s) that you would like to add to the new job.  
To the right of the report name right click on the **More (...)** button and select the **Create a new job** icon from the pull-down menu.



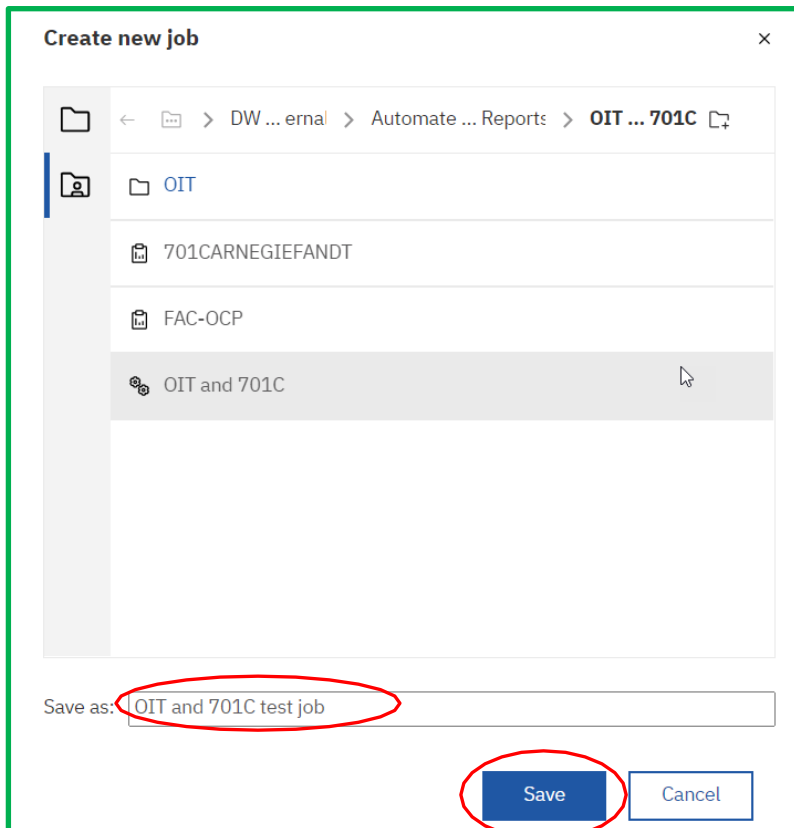
- 2) The new job **Steps** window opens.



- 3) Click on the **Save** button in the top left of the Orange navigation bar.
- 4) The **Create new job** window opens.



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



7) You will return to the **Steps** window and see the report(s) that will run in this job.

| <b>Steps</b>             |           | <a href="#">Change default step options</a> |              |   |
|--------------------------|-----------|---|--------------|---|
| <input type="checkbox"/> | Type      | Name  | Step options | + |
| <input type="checkbox"/> | 1  Report | 701CARNEGIEFANDT                            | Custom       |   |

### Add Reports to the Job

- 1) Within the **Steps** window you can **Add** reports to the job.
- 2) Click the **+** button in the gray header, to the right of the **Step options** column.
- 3) The **Add job steps** window opens. Navigate to the report that you would like to add to the job.
- 4) Select the **check box** next to the report(s) you want to add. Select **Add job steps** to accept your selection(s).

#### Add job steps

DWI Internal > Automated Listserv Reports > OIT and 701C

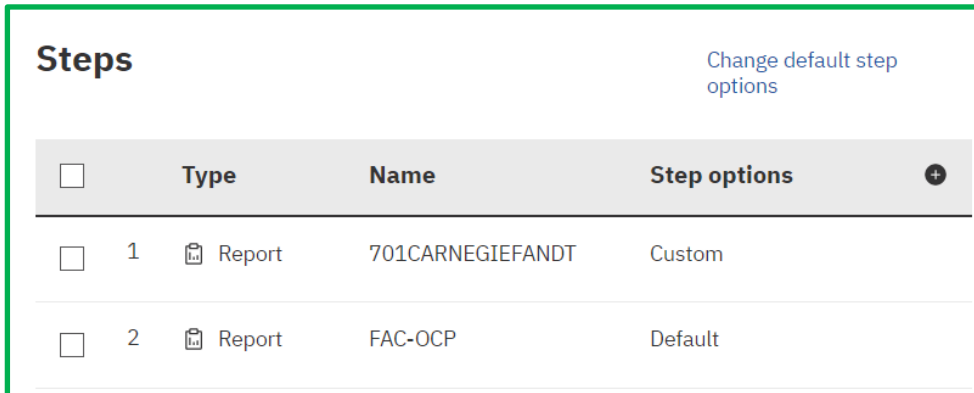
- 701CARNEGIEFANDT
- FAC-OCF
- OIT
- OIT and 701C
- OIT and 701C test job

Select all in folder      Deselect all in folder

1 selected    Clear all selected

**Add job steps**    Cancel

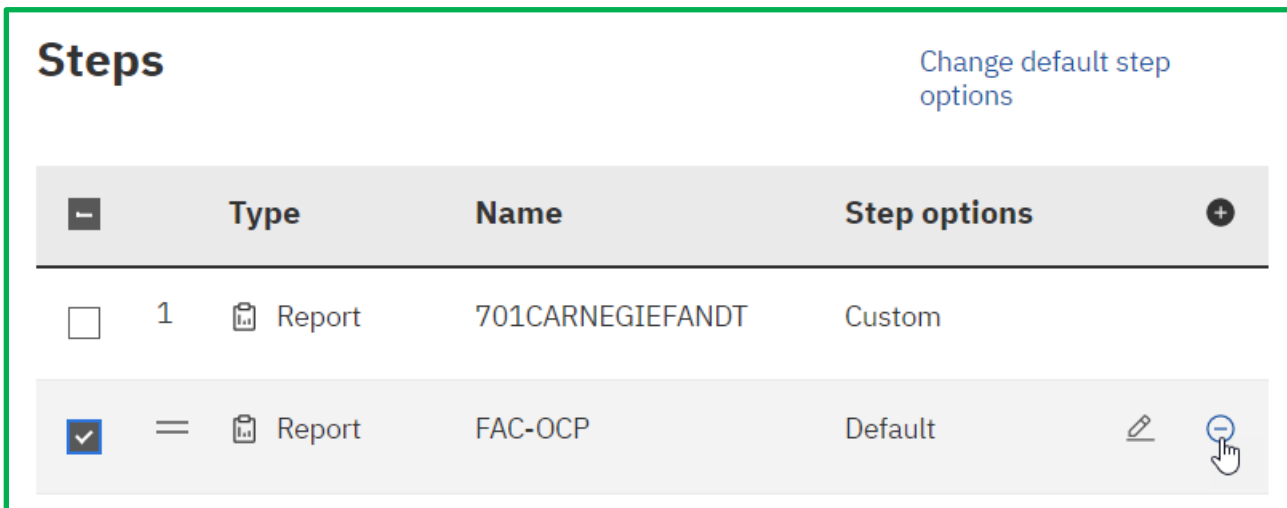
5) You will return to the **Steps** window and your new selection(s) will appear in the list.





| <input type="checkbox"/> | Type     | Name             | Step options | + |
|--------------------------|----------|------------------|--------------|---|
| <input type="checkbox"/> | 1 Report | 701CARNEGIEFANDT | Custom       |   |
| <input type="checkbox"/> | 2 Report | FAC-OCP          | Default      |   |

### Remove Reports from the Job

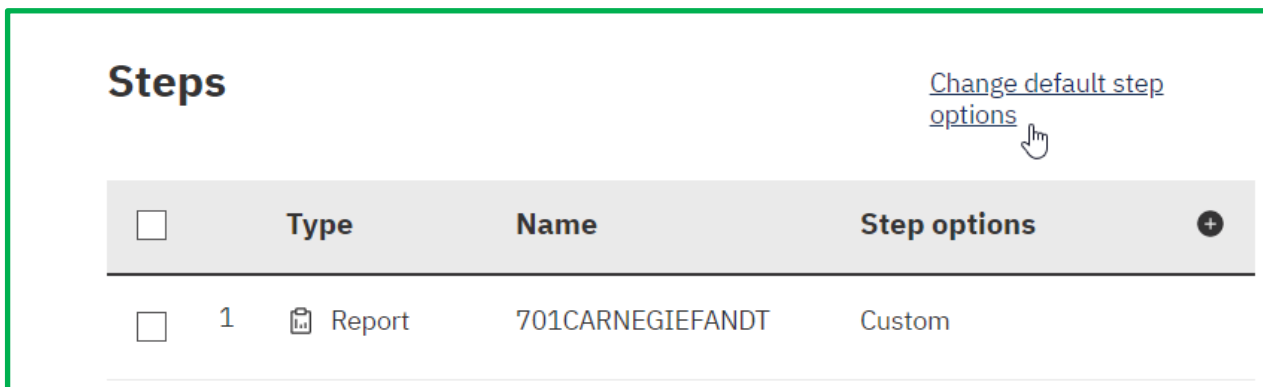
- 6) To remove a report **check** the box to the left of the report you want to remove, in the **Steps** window.
- 7) Hover your mouse to the right in the same row until the Edit options ( pencil) button and **Remove job step** button appear. As soon as you click on the **Remove** button the row will disappear.



| <input type="checkbox"/>            | Type     | Name             | Step options | +   |
|-------------------------------------|----------|------------------|--------------|---|
| <input type="checkbox"/>            | 1 Report | 701CARNEGIEFANDT | Custom       |   |
| <input checked="" type="checkbox"/> | = Report | FAC-OCP          | Default      |   |

### Change Default Step Options

- 1) To change default step options click on that button to open the job **Options** window.



| <input type="checkbox"/> | Type     | Name             | Step options | + |
|--------------------------|----------|------------------|--------------|---|
| <input type="checkbox"/> | 1 Report | 701CARNEGIEFANDT | Custom       |   |

8) In this window you can set your **Run to, Format, Bursting, Delivery** and **Language** options.

**OIT and 701C test job**

**Options**

Find

**Run to** Produce report outputs

**Format**

Use default format

HTML     PDF     Excel

Excel Data     CSV     XML

**Accessibility**

Enable accessibility support

**Bursting (disabled)**

**Delivery**

Save report

Save report as an external file [Edit details](#)

Send report by email

Send report to mobile device

Print ⓘ

**Languages** English

## Select Default Options for Listserv

- 1) **Format:**  
De-active button: **Use default format**  
Uncheck **HTML**  
Check **Delimited text (CSV)**
- 2) **Bursting (disabled)**
- 3) **Delivery:**  
Uncheck **Save report**  
Check **Save report as an external file**
- 4) The **Edit details** button will appear.

The screenshot shows a configuration interface for Listserv. At the top, there is a section titled "Bursting (disabled)" with a dropdown arrow. Below this is the "Delivery" section, which contains several options with checkboxes:

- Save report
- Save report as an external file [Edit details](#)
- Send report by email
- Send report to mobile device
- Print (i) ▼ ▲

At the bottom of the interface, there is a "Languages" section with a button labeled "English" and a close icon (x).



- 5) Click on the **Edit details** button to open the **external file** window.
- 6) In the **Location** menu select **listserv**.  
If you are sending report output to another file system, you must have access to that system, so it appears in the pull-down menu as a selection.
- 7) **Conflict resolution:** keep the default setting **Replace existing files**.
- 8) Select the **Close** button when ready.

← Save report as an external file

**Name**

OIT and 701C test job

Reset name

**Location**

listserv

**Conflict resolution**

Keep existing files

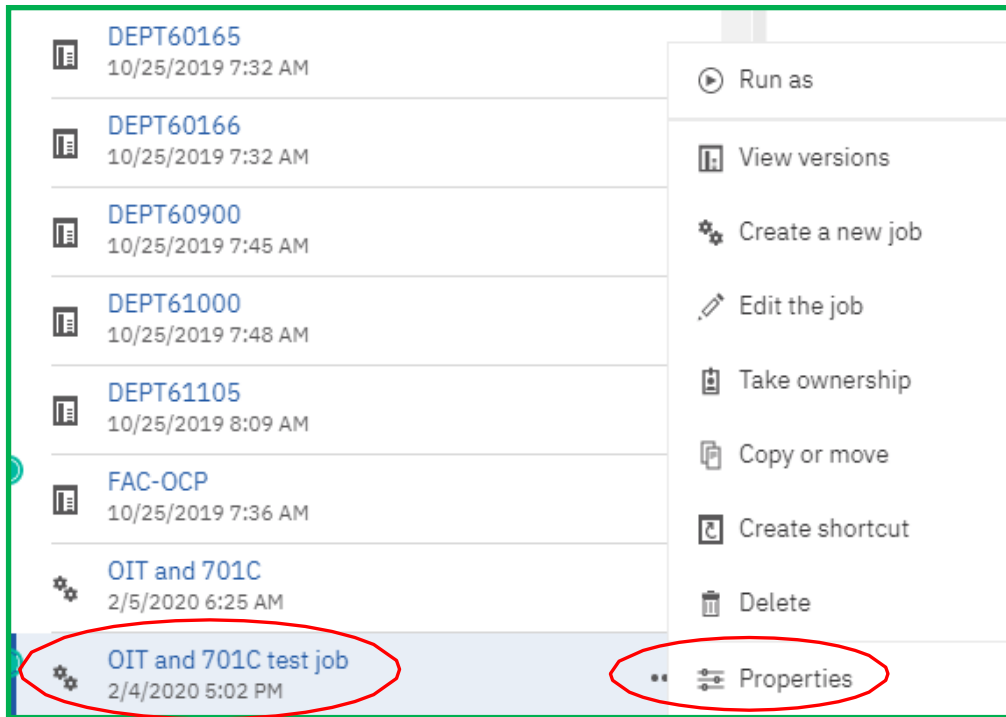
Replace existing files

Make the file names unique and append a timestamp

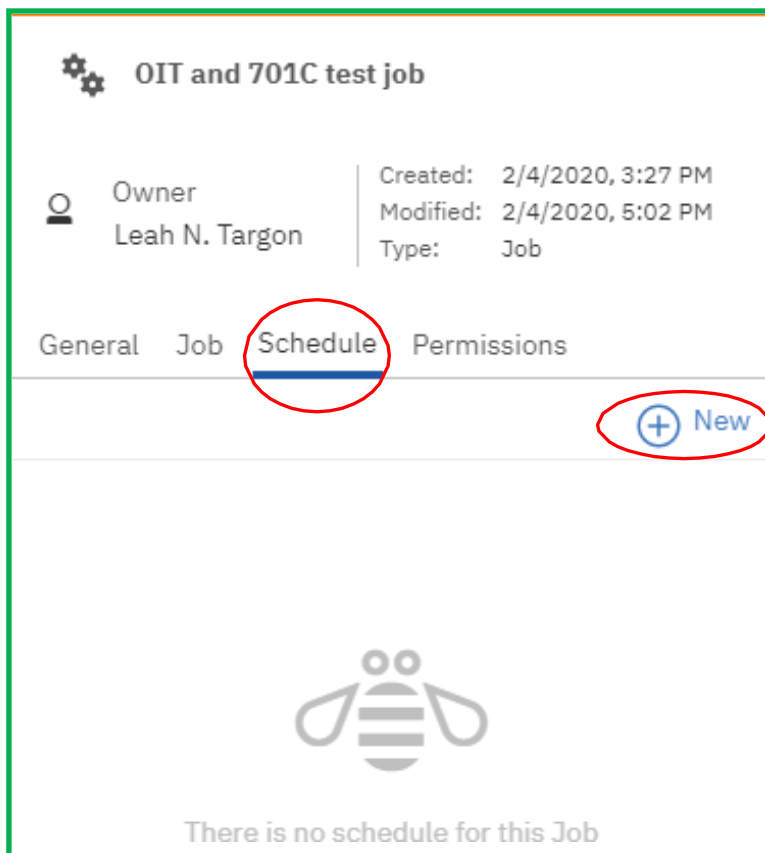
Make the file names unique and append a sequence number

## Schedule the New Job

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



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



3) 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 selected time period during the day.

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

← Back      **Create schedule**

Schedule      Weekly ▾

**Period**

Start      2020-02-05      10:02 AM

End      2020-05-05      10:02 AM

No end date

Run every      1 week(s)

On day(s)      M T **W** T F S S

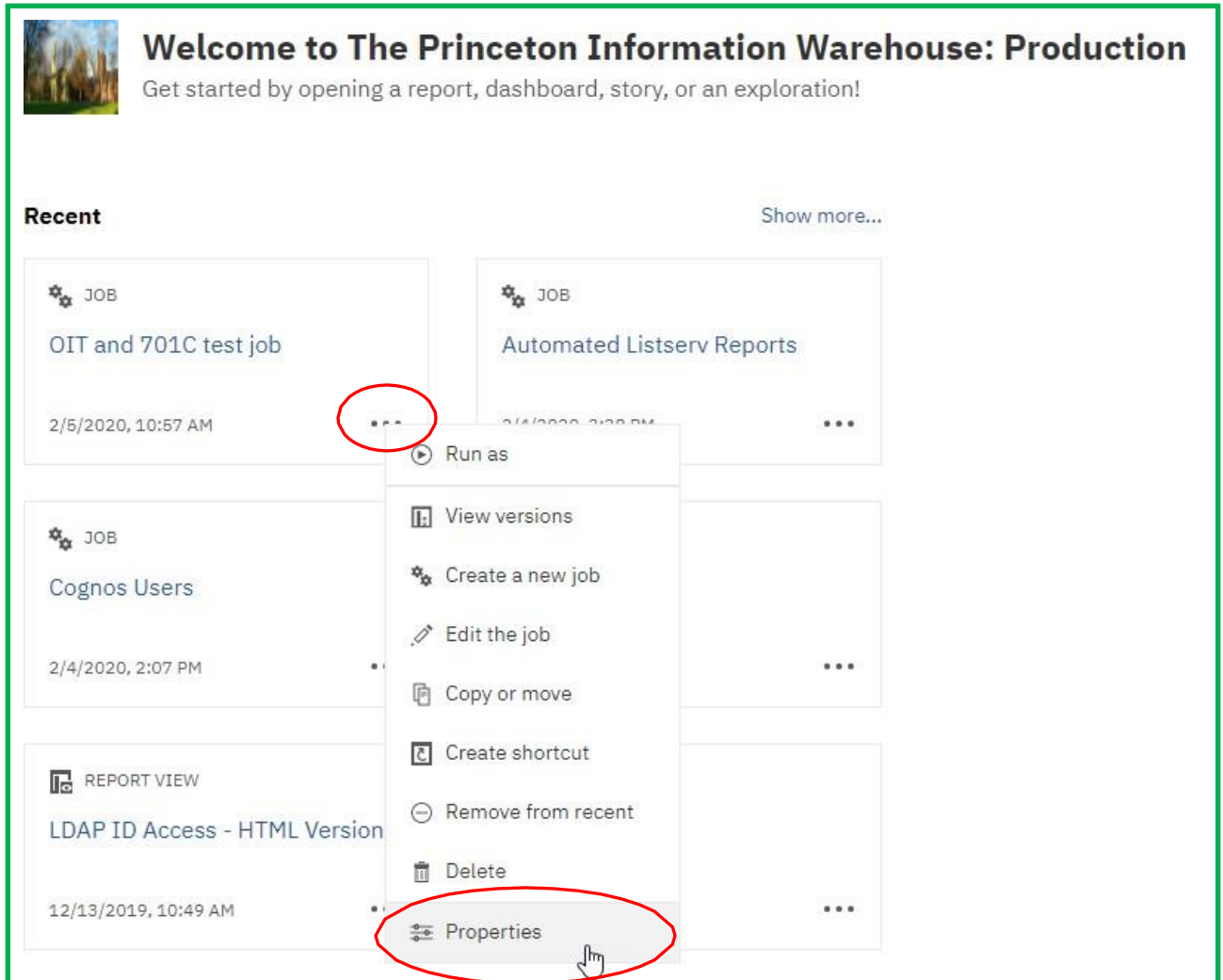
Daily time interval

**Create**      Cancel

## Disable the Job

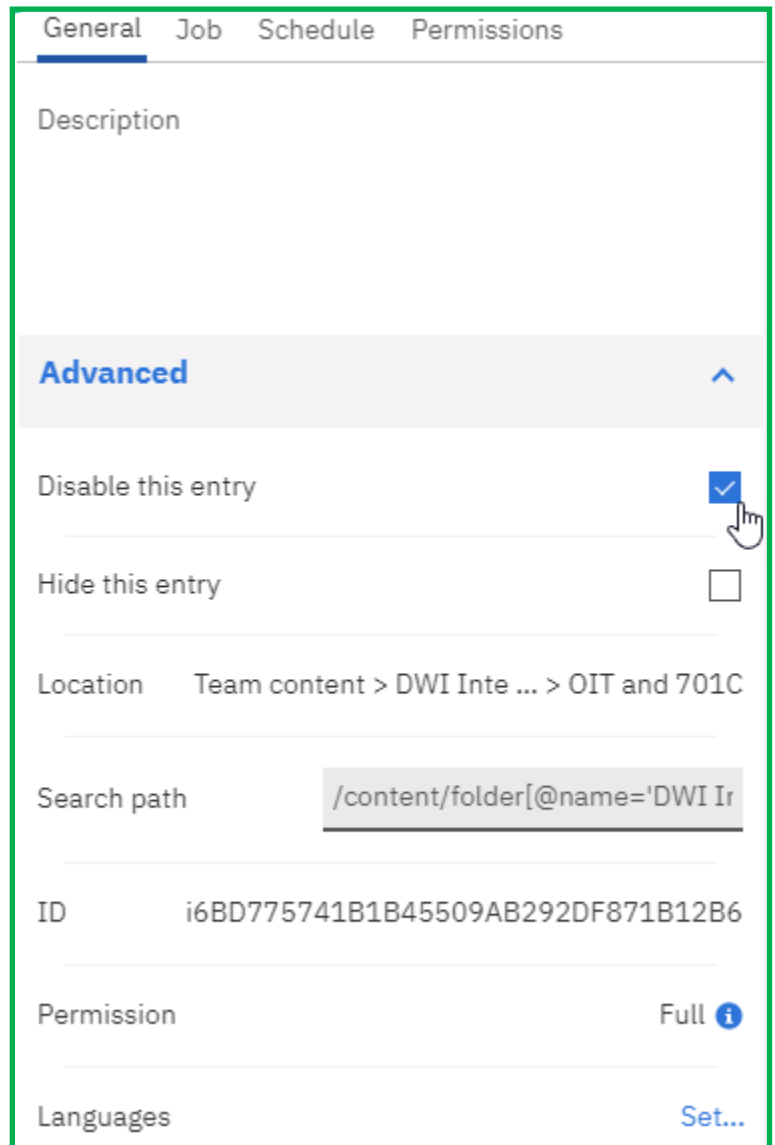
You can disable a job if you decide you do not want it to run, want to keep it, and not delete it.

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



- 3) The **Properties** fly-out window opens.
- 4) Open the **Advanced** area under the **General** tab.
- 5) Check **Disable the entry**.

You can also **hide** the job by selecting **Hide this entry**.



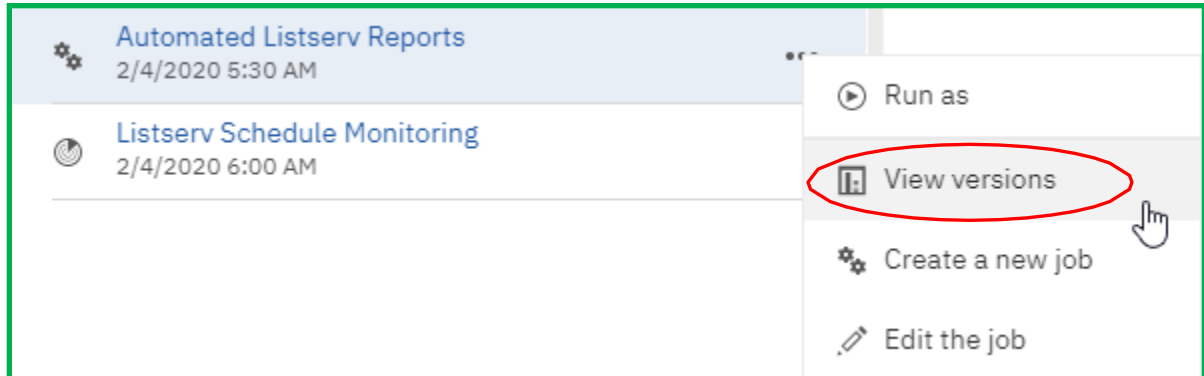
The screenshot shows a software interface with a 'General' tab selected. The 'Advanced' section is expanded, showing two options: 'Disable this entry' with a checked checkbox and 'Hide this entry' with an unchecked checkbox. A mouse cursor is pointing at the checked checkbox. Below these options, the 'Location' is 'Team content > DWI Inte ... > OIT and 701C', the 'Search path' is '/content/folder[@name='DWI Ir', the 'ID' is 'i6BD775741B1B45509AB292DF871B12B6', the 'Permission' is 'Full', and the 'Languages' section has a 'Set...' link.

| General                        | Job  | Schedule | Permissions |
|--------------------------------|--|----------|-------------|
| Description                    |  |          |             |
| <b>Advanced</b> <span>^</span> |  |          |             |
| Disable this entry             | <input checked="" type="checkbox"/>        |          |             |
| Hide this entry                | <input type="checkbox"/>                   |          |             |
| Location                       | Team content > DWI Inte ... > OIT and 701C |          |             |
| Search path                    | /content/folder[@name='DWI Ir              |          |             |
| ID                             | i6BD775741B1B45509AB292DF871B12B6          |          |             |
| Permission                     | Full <span>i</span>                        |          |             |
| Languages                      | Set...                                     |          |             |

## 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.

