

A job allows a user to set the same schedule for multiple reports, report views, and other jobs. The collection of reports (entries) are categorized into a job and scheduled together sharing the same schedule settings. Therefore, when a scheduled job runs, all the entries in the job run. Users can specify running a job all at once or in sequence.

This QRC assumes users know how to create report views and schedule reports.

- 1. Launch Cognos.
- 2. Create report views of the reports you intend to use in the job or move reports to a specific folder if necessary.
 - a. It is recommended the prompt values are set in the report view. Setting prompt values in the report view will allow for easier management of the prompt values.
- 3. NOTE: Disable any schedule(s) currently on the report view(s) you intend to use in the job. If the schedule is not disabled, it will run along with the job schedule.

Setting Prompt Values on the Report View

It is recommended the prompt values are set in the report view. Setting prompt values in the report view will allow for easier management of the prompt values.

- 1. Navigate to the folder containing the report view.
- 2. Select the **ellipsis** to the right of the report view title and then select the **Properties** option.

Ŀ	Report view of Standard Content Metadata 3/7/2019 1:13 PM	•	IDNA Run as
		Ŀ	View versions
		**	Properties
		ē	Copy or move
		Ľ	Create shortcut
			Embed
		దర్శ	Share
		Ô	Delete



3. Select the Report tab. Then select Set values.

Properties			
General	Report		Schedule
Source			
Boiler Insight 2			
Prompt for values			
No • Yes			
Current values			
There are currently no	values		
Set values			
Report			
More options			

- 4. Select **Set Values**. NOTE: If the prompts are already set on the report view, you will see the word **Edit Values** instead of **Set**. If this is the case and you don't want to revise your prompt choices, you can skip to the section of this document called **Creating a Job**.
- 5. The prompt page for the reports should appear. Enter values in the prompts and click **Submit/Finish**. Your prompt values are now saved.
- 6. Select Save





Creating a Job

1. To create a job, select the **New+** button and then choose the **Job** choice.



2. Select + to add the entries (reports, reports views, etc) to the job.

Steps			Change default step options
Туре	Name	Step options	•

- 3. Navigate to the folder(s) holding the reports, report views, etc.
- 4. Click on the **checkbox** to each entry in the folder that should be part of the job schedule.
- 5. Click Add job steps when all the entries have been selected to the Selected entries area. All the selected entries should appear at the top of the page under Steps:

1	Steps			
		Туре	Name	Step options
	1	l ^{ອ₁} Report view	Report view of Account Balance Listing - Scheduled View	Default
	2	(₿ Report view	Report view of Monthly Transaction Listing - Scheduled View	Default



- 6. In the Run Options section, under Run Order, select Run in sequence.
 - a. The In sequence selection means the entries are executed in the order they appear in the Steps lists.
 <u>NOTE</u>: In sequence means when one report finishes running the next report will run. This allows report executions to be staggered so the system resources are not taxed.
 - b. Click **Continue on error** under **In sequence** to have the job continue to run even it one entry fails. If this is checked the job will not stop if it runs into an error with a report.

Run options	
Run order	
 Run all at once Run in sequence 	
Continue on error Enabled	

Run as

Create a new job

Edit the job

View versions

Add shortcut

Properties

Copy or move to

Edit name and description

7. If an asterisk is still visible on the Application bar, the Job has not been saved. Click Save.



Editing a Job or Schedule

- 1. Navigate to the folder that contains the job.
- 2. Click on the ellipsis to the right of the job and then the Edit the job option.
- 3. Hover over the report to view the pencil and delete buttons
 - The **pencil** to edit the individual report/report view such as the delivery options, report format, and prompt selections.
 <u>NOTE</u>: The **pencil** allows you to customize your delivery options for each report within your job.



Report view 1 can be delivered via email in Excel format. Report view 2 can be delivered to a different email address and in PDF format.

	Туре	Name	Step options	•
1	🕲 Report view	Report view of Accountsting - Scheduled View	ew Default	\mathbf{N}
	🕲 Report view	Report view of Monthlysting - Scheduled Vie	ew Default	2 0



- b. The **delete** button removes the report from the job.
- 4. Save after editing the job properties.



Adding the Schedule to a Job

- 1. Open the job. Select the Schedule button.
- 2. Click on Create schedule.
- 3. Select the appropriate Frequency and Start/End time for the schedule.
- 4. Save after editing the job properties.

NOTE: If you would like to have the reports within the job emailed to you/others, continue to the Emailing the Reports within a Job section.



- 1. Navigate to the folder that contains the job.
- 2. Click on the ellipsis to the right of the job and then then the Properties option.
- 3. Click on the Schedule tab and then Edit.



Schedule 🛱	



4. The **pencil** to edit the individual report/report view such as the delivery options, report format, and prompt selections.

<u>NOTE</u>: The **pencil** allows you to customize your delivery options for each report within your job.

For Rep Rep	example: ort view 1 can be ort view 2 can be	delivered via email in Ex delivered to a different e	cel format. email address and in PDF format.	
	Туре	Name	Step options	O O
1	🛱 Report view	Report view of Account	sting - Scheduled View Default	
□ =	🔓 Report view	Report view of Monthly	sting - Scheduled View Default	

- a. The **delete** button removes the report from the job.
- 5. **Save** after editing the job properties.
- Click on the Job tab, then the Advanced bar, then Set on the Schedule Job row. This will open the job's schedule.



General Job Permissions		
Run History	5	Occurrences T
Advanced		^
Run History		View
Properties		Set
Schedule Job		Set

7. Update the schedule and click **OK** when finished.



Emailing the Reports within a Job

- 1. Follow Steps 1 3 under Editing a Job.
- 2. Under the Steps section are all the report views for the job. Next to each report view, under Options and

prompt values, is a pencil . Click on the pencil.

3. A Select the report options window will appear. Under Report options, click the checkbox next to Override the default report options.



4. Under the Delivery section, select the Send a link to the report by email.



- 5. Click on **Edit the email options** to set up the email for the report. Add the email address(es) and determine if the report should be sent as a link, attachement, or both.
- 6. Click **OK** afer setting up the email.
- 7. Click OK to close out of the Select the report options box.
- 8. Repeat steps 2-7 for each report view in the job that you want to email.
- 9. When done, click **OK** to close out of the **Set properties** box.

Set the email options Report view of Standard Content Metadata
Specify the recipients and contents of the email. To add recipients, click Select t
bitest03@purdue.edu
Cc:
Select the recipients Show Bcc
Subject:
Job:
Body:
✓ Include a link to the report
Attach the report
OK Cancel