

# IBM Cognos Proven Practices: IBM Cognos BI – Create a Custom Schedule Using Calculations and Parameters in Event Studio

**Nature of Document: Tip or Technique; Product(s): IBM Cognos Event Studio; Area of Interest: Reporting**

Selvakumar Gunasekaran  
Consultant  
Cognizant Technology Solutions

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An approach to scheduling a report which can be delivered to users on multiple, non-recurring dates using an IBM Cognos Event Studio agent.

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## Introduction

### Purpose

This document describes an approach to schedule a report which can be delivered to users on multiple, non-recurring dates using an IBM Cognos Event Studio agent.

### Applicability

The following technique was tested with IBM Cognos 10.1 and 10.1.1.

### Exclusions and Exceptions

At the time of the writing of this document, Event Studio was not supported in Mozilla Firefox.

### Assumptions

This document assumes readers have experience with IBM Cognos BI, in particular IBM Cognos Report Studio and IBM Cognos Event Studio.

## Overview

In many cases, report consumers need their reports automatically delivered by email. For recurring dates this can be done using IBM Cognos scheduling options, but within a single schedule, there is no option to schedule the report for multiple non-recurring dates. In these scenarios,

consumers typically end up creating multiple schedules using multiple report views, which becomes cumbersome to maintain.

Let's assume that the user wants the report to be delivered to their email inbox on the following non-recurring dates:

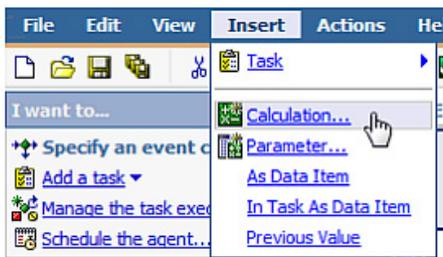
- 04 Jan 2012
- 09 Jan 2012
- 13 Jan 2012
- 17 Jan 2012
- 25 Jan 2012
- 30 Jan 2012

This document provides steps to schedule a report to run on non-recurring dates using calculations and parameters in an IBM Cognos Event Studio agent.

## Create an Agent

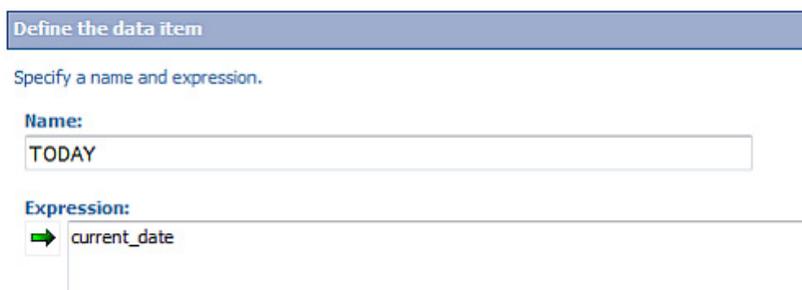
1. Open Event Studio and select a package.
2. From the **Insert** menu, click **Calculation....**

**Illustration 1: The Insert menu with the Calculation item highlighted**



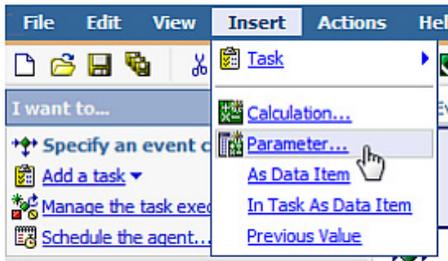
3. In the **Define the data item** screen, in the **Name:** field, type *TODAY*, and in the **Expression:** field box type *current\_date*.

**Illustration 2: The Define the data item screen with the Name and Expression fields filled in**



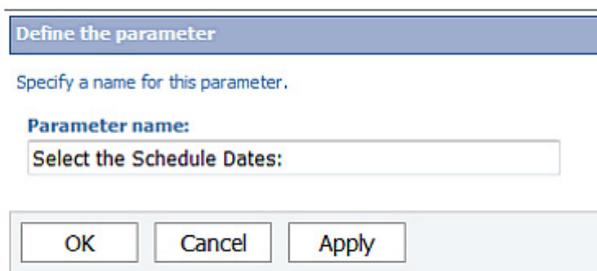
4. Click **OK**.  
Next, you will insert a parameter.
5. From the **Insert** menu, click **Parameter....**

### Illustration 3: The Insert menu with the Parameter item highlighted



- In the **Parameter name:** field, type *Select the Schedule Dates:*. The parameter name is case-sensitive.

### Illustration 4: The Define the parameter screen with the Parameter name field filled in



- Click **OK**.  
Next, you will specify the event condition.
- On the **Detail** tab in the **Expression** box, enter the following expression exactly as shown.  
[TODAY] in (?Select the Schedule Dates:?)

### Illustration 5: The Event screen with the Detail tab selected and an expression defined in the Expression pane

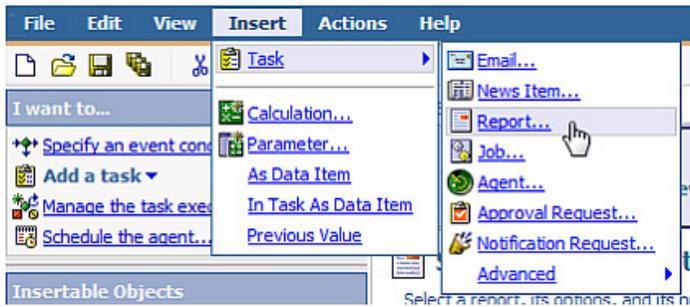


[TODAY] is the calculation just created, which can also be added to the expression from the Data Items tab under the Insertable

Objects pane. **Select the Schedule Dates:** is the parameter just created, which can also be added to the expression from the Parameters tab under the Insertable Objects pane. Next, you will insert the report to be run as a Task.

- From the **Insert > Task** menu, click **Report...**

### Illustration 6: The Insert menu with the Report item highlighted under the Task item



- Click on the **Select the report...** link to select the report which has to be scheduled (in this case the report is titled Health Insurance) and then click **OK**.
- Under **Options:**, click the **Set...** link to specify the options for the report.

### Illustration 7: The Report task highlighting the Set link under Options



- Check the **Override the default values** option.
- In the **Select the report options** screen, under the **Delivery:** section, select **Save the report** and **Send the report by email**. Click the **Edit the options...** link beside the selected **Send the report by email** option.

## Illustration 8: The Select the report options screen showing the options to save the report and to send the report by email selected

### Delivery:

Select at least one delivery method. For burst reports, the email recipients are:

Save:

- Save the report
- Save the report as a report view [Edit the options...](#)  
... > Report View of Health Insurance

Print the report

**Printer location:**  
 [Select a printer...](#)

Send the report by email [Edit the options...](#)  
 0 recipients

14. In the **Set the email options** screen, provide the recipients, the subject and email contents as per your requirements and ensure the **Attach the report** option is selected.

## Illustration 9: Set the email options screen for the selected report configured as required

**Set the email options - Health Insurance**

Specify the recipients and contents of the email. To add recipients, click [Select the recipients](#) or type the email address in the semi-colons. To include an HTML report as the message body, leave the Body box empty and select the **HTML** option.

**To:**

**Cc:**  
  
[Select the recipients...](#) [Show Bcc](#)

**Subject:**

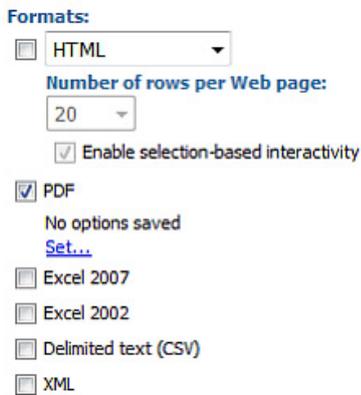
**Body:** [Change to plain text >>](#) **B** **I** **U**    

Include a link to the report

Attach the report

15. Click **OK** to return to the Select the report options screen.
16. De-select the **HTML** option and select the **PDF** option.

## Illustration 10: The Select the report options screen showing PDF as the only output format for the report



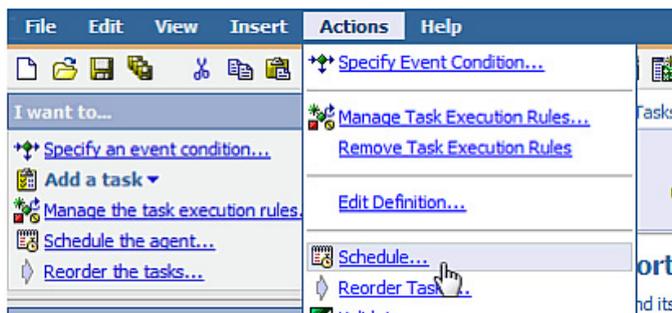
17. Click **OK**.

## Schedule the Agent

In this step you will set the schedule of the agent to run the report rather than using the report's schedule. This will allow you to leverage the event's expression containing the parameter you created and pass it the dates that you want the event condition to equal to true. When the event condition is true, then the report task will execute.

1. From the **Actions** menu, click **Schedule...**

## Illustration 11: The Actions menu with Schedule item highlighted



2. In the **Frequency:** section, click the **By Day** tab and ensure the **Every '1' day(s)** option is selected.

## Illustration 12: The agent's scheduled frequency of every 1 day(s)

### Frequency:

Select the frequency by clicking on a link.

[By Day](#)
 [By Week](#)
 [By Month](#)
 [By Year](#)
 [By Trigger](#)

- Every  minute(s)
- Every  hour(s)
- Every  day(s)

### Daily Frequency:

Every  day(s) between  and

- Provide the schedule start and end dates as required. For this example, we will use Jan 3 2012 and Jan 31 2012 respectively.

## Illustration 13: The agent's scheduled start and end dates configured

### Start:

### End:

No end date  
 End by:  
   
 

You will now provide prompt values for the agent.

- In the **Prompt values** section, check the **Override the default values** option, then click the **Set...** link.

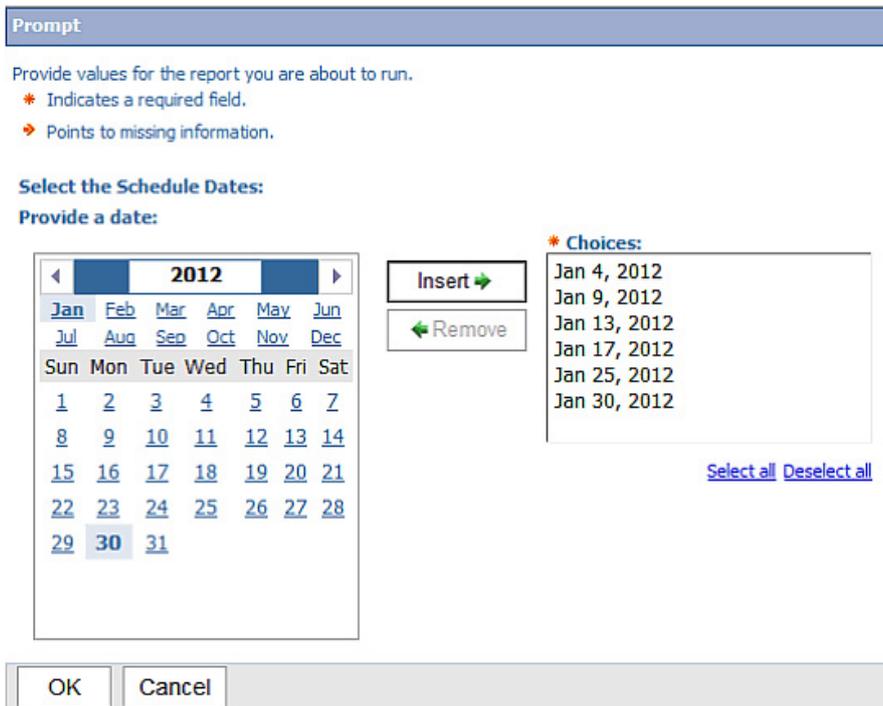
## Illustration 14: Schedule's Prompt values section with Override the default values selected and the Set link highlighted

### Prompt values

Override the default values  
 No values saved  
[Set...](#) 

- In the date prompt that appears on the **Prompt** screen, select the dates on which the report should be delivered to users. In this case we will use:
  - 04 Jan 2012
  - 09 Jan 2012
  - 13 Jan 2012
  - 17 Jan 2012
  - 25 Jan 2012
  - 30 Jan 2012

## Illustration 15: The Prompt screen with appropriate values selected on the calendar and added to the Choices pane using the Insert button



6. Click OK to save the prompt values.
7. Click OK to save the schedule.
8. From the **File** menu, click **Save** to save the agent.

This Agent is now scheduled to run on a daily basis from Jan 3 2012 to Jan 31 2012. The event condition will only be satisfied on the dates specified in the prompt values and therefore the report output will be delivered through email to users' mailboxes on those dates.

As needed, the prompt values for the agent can be modified to meet the needs of the custom schedule. To do that, you can either open the agent in Event Studio and edit the prompt values in the schedule, or in IBM Cognos Connection, click the Schedule icon for the agent and edit the prompt values there.

## About the author

### Selvakumar Gunasekaran

Selvakumar Gunasekaran has worked extensively with the IBM Cognos BI suite. He has provided BI Solutions for clients in banking and pharmaceutical domains. Selvakumar is an IBM Certified Developer (Cognos BI Metadata Models) and Designer (Cognos BI Reports).

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