

# ePM Quick Reference Guide #148

## Setting Up Report Views and Report Delivery

### INSITE TEAMWHAT IS...

A report view allows users to select the type of content they need in a report. It also provides users with a streamlined way to view the requested information easily and quickly. If a report with the same parameters is run often and/or needs to be delivered on a schedule, a report view can be created to save time.

### WHO USES

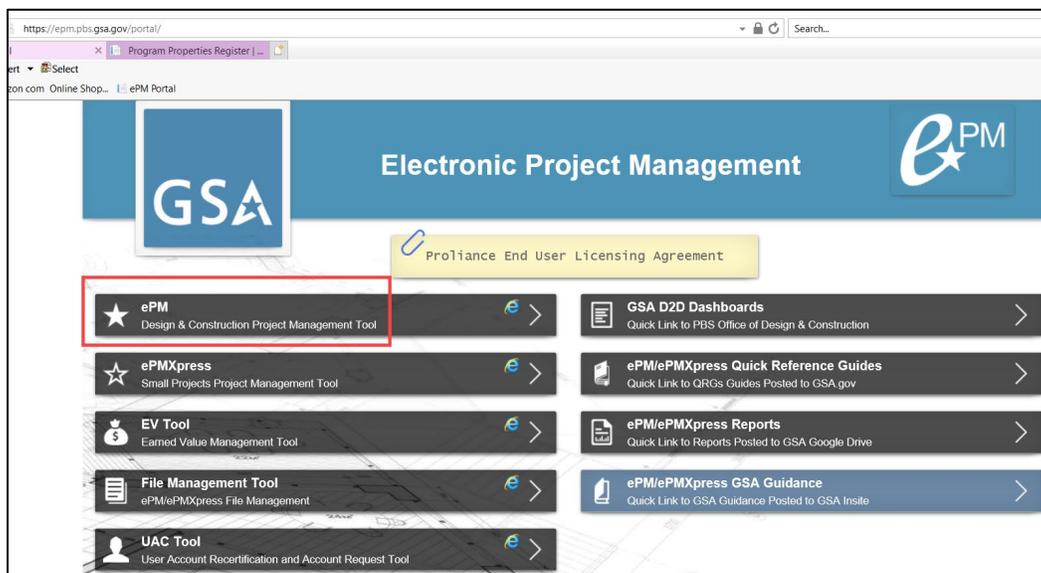
- Project Managers
- Program Managers
- ePM System Administrators
- Cognos Administrators

### HOW TO...

Complete the following steps to create a report view and a delivery schedule.

#### A. LOG INTO COGNOS ANALYTICS

1. Using Internet Explorer, go to the [ePM Portal](#).
2. Click 'ePM' in the list of applications.

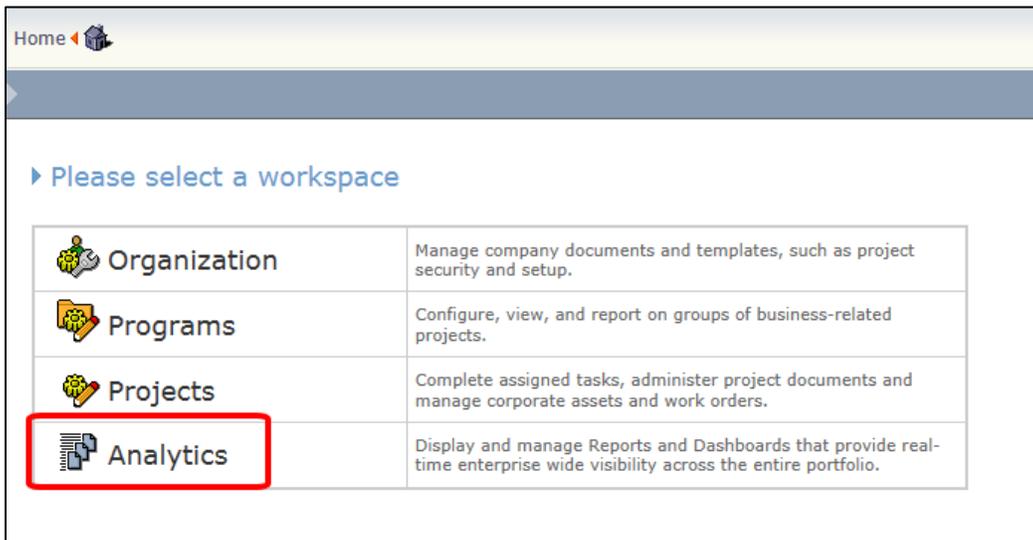


**Optional:** If external to the GSA network: Complete the following Multi-Factor Authentication (MFA) steps. (For screenshots see QRG 001)

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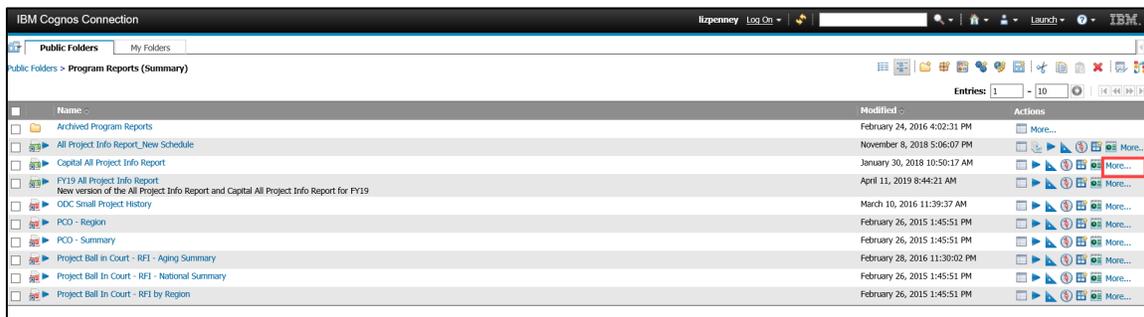
- a. Enter your GSA User ID and click 'Submit'
  - b. Select a delivery method for your one-time registration code and click 'Submit'. (If your preferred delivery method does not exist send a request to [epmsupport@gsa.gov](mailto:epmsupport@gsa.gov))
  - c. Enter the four digits registration code you received and click 'Submit'.
  - d. Enter your password and click 'Submit'.
3. Click 'Analytics' on the 'ePM Workspace' page.



4. Click 'My Home'.
5. Navigate to the desired report folder.

### B. CREATE THE REPORT VIEW

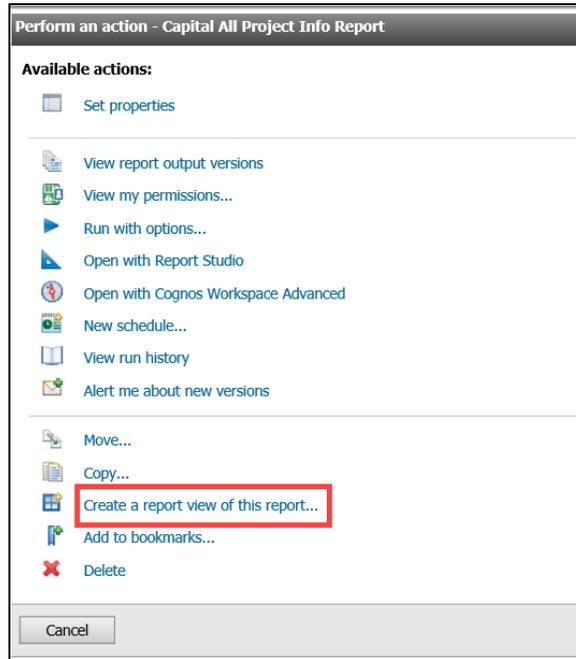
1. In the desired report folder, select More... on the far right side of the report list next to the report name.



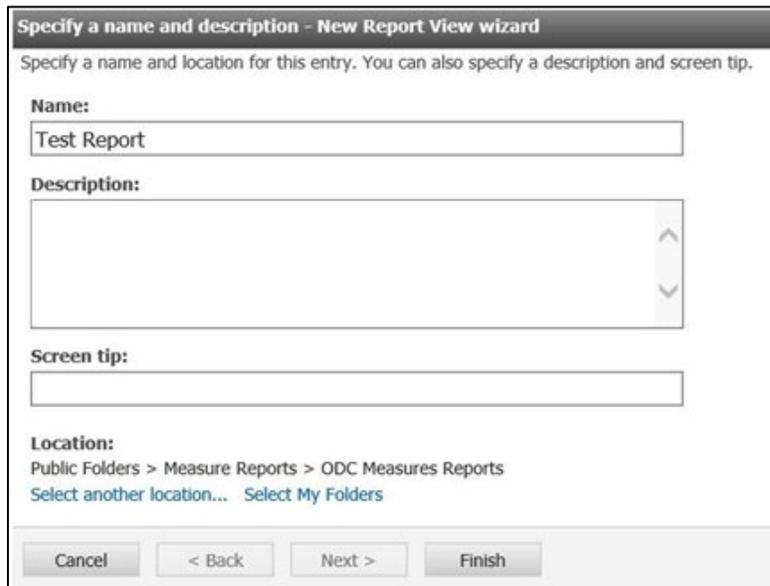
2. From the list of available actions, select 'Create a report view of this report'.

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3. On the New Report View wizard screen:
  - a. Give the name of the report being created
  - b. Select a location for the new report



NOTE: It is very important to select a location different than the default location such as My Folders or in a regional reports folder.

4. Click 'Finish' when done with the name of the report and location.

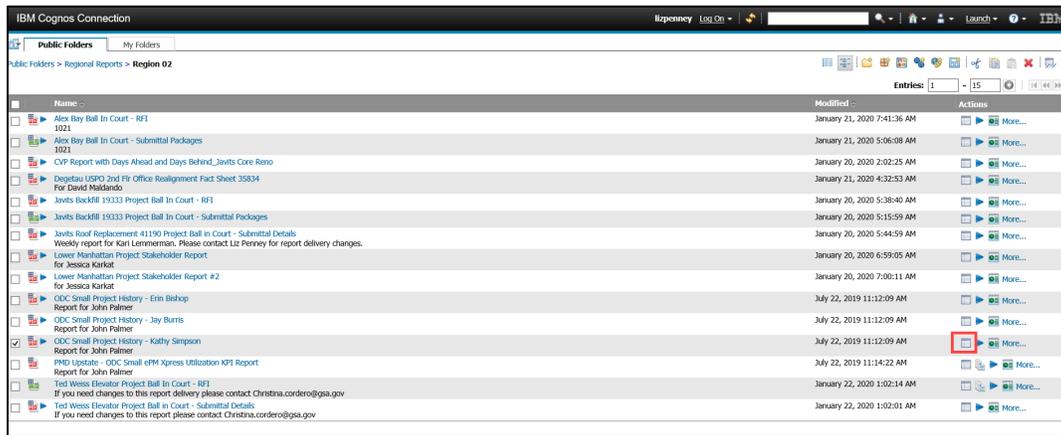
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### C. SETTING THE REPORT PARAMETERS

1. Navigate to the folder where you saved the report.
2. On the far right side of the report entry, click the Set Properties icon to launch the Set Properties page.



3. Click the Report View tab. From the list of actions displayed, choose the following options:
  - a. Default Action: Choose Run the Report
  - b. Report Options: Put a check mark in the Override the default report options and choose the report format (PDF, Excel, etc.).

Set properties - ODC Small Project History - Kathy Simpson

General Report view Permissions

Select the default options to use for this entry.

**Default action:**  
Run the report

**Report options:**  
 Override the default report options

**Format:**  
PDF

**Accessibility:**  
 Enable accessibility support

**Language:**  
English (United States)

**PDF options:**  
No options saved  
Set...

**Prompt values:**  
No values saved  
Set...  
 Prompt for values

Advanced options

OK Cancel

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4. Click Edit... to open the report's prompt page.
5. Select the report parameters (region, project, project type, city, state, etc.).
6. On the last prompt screen, click 'OK' or 'Run Report' to be taken back to the Set Properties page.
7. Uncheck the Prompt for Values box.
8. Click 'OK'.

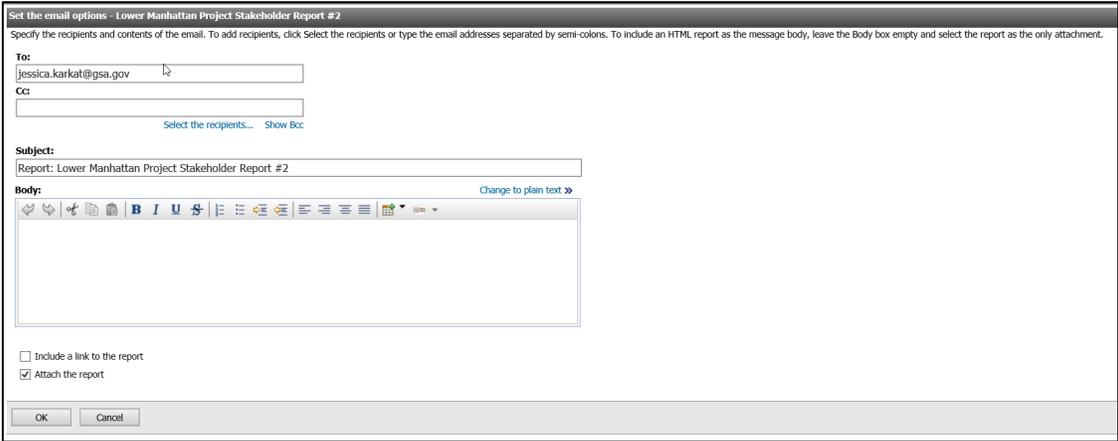
### D. CREATING THE REPORT SCHEDULE

1. Navigate to the report view that was created in a previous step.
2. Click the calendar icon to the right of the report view to open the Schedule window.
3. Set the desired frequency for the delivery in the top section of the Schedule page.

4. Under the Options heading, check the Override the default values box. Make sure that the format (Excel, PDF, etc.) is the same as format that you selected when creating the report view.
5. Uncheck the Save the report box.
6. Put a check mark in the Send a link to the report by email box.
7. Click the Edit the email options... link to open the Set the email options window
  - a. Enter the recipient's email address
  - c. Adjust the email Subject if needed
  - d. Enter the Body of the email if needed
8. At the bottom of the Set the email options window, uncheck the Include a link to this report box.
9. Put a check mark in the Attach the report box.
10. Click 'OK' to return to the Schedule window.
11. Click 'OK'.

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## REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 80 - ePM Analytics navigation Basics