Using Agents for Delivered Reports from EBI

Overview

Agents are used to deliver dashboards/reports from EBI to an end user's email inbox.

- Agents and the agent settings are dashboard or dashboard page specific
- Agents are created and managed by the Data Analytics and Strategic Support staff
- All users have access to subscribe to agents and receive the delivered report via email
- Users must create a Default Customization for the dashboard/dashboard page that uses the agent

How do I subscribe/unsubscribe to an Agent?

Links to the agents will be available on the dashboard pages where they apply.

<u>Subscribing to an Agent:</u>

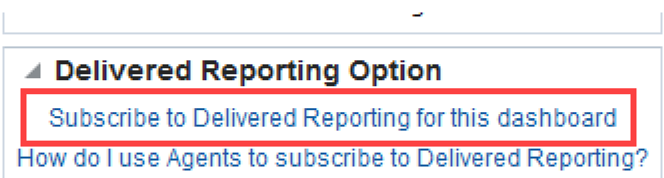
1. Log in to EBI using **Chrome as your browser**.

   NOTE: The "Subscribe to Delivered Reporting for this Dashboard" link will not work in Firefox.

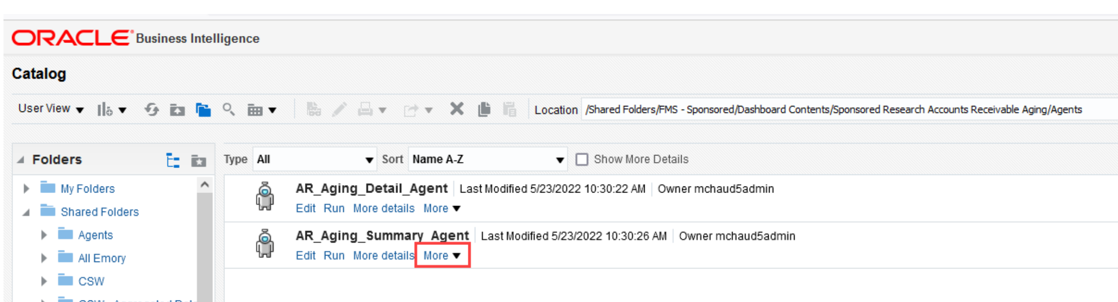
2. Navigate to the dashboard that you want delivered.

   NOTE: If a dashboard has multiple dashboard pages, it may have different agents per page. You will need to subscribe to each agent individually.

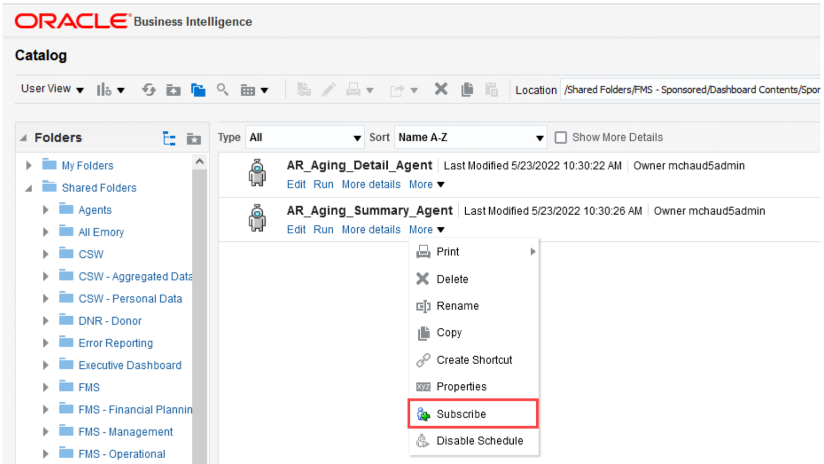
3. Locate and select the link that says "Subscribe to Delivered Reporting for this Dashboard"



4. Locate the Agent and click "More"



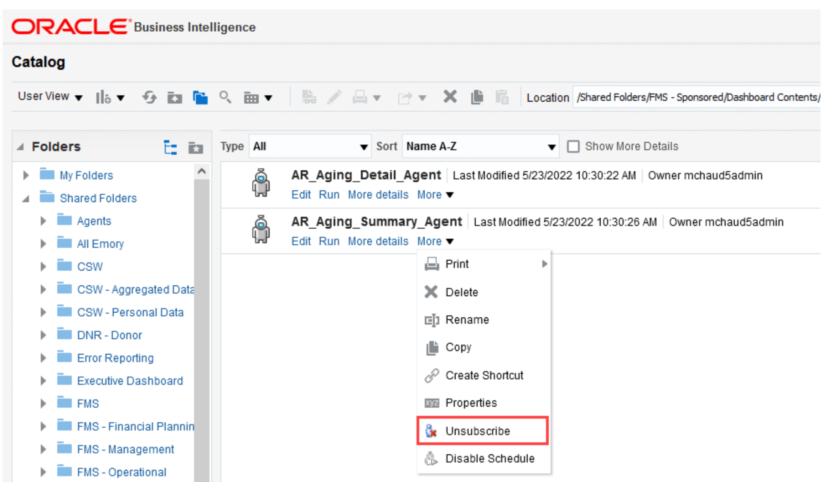
5. Select “Subscribe”



Unsubscribing from an Agent:

1. Repeat steps 1-3 from above.

2. Select “Unsubscribe”



Why do I need a Default Customization and how do I create one?

Agents require users to create and save a Default Customization for the dashboard page. If no Default Customization is set, the agent will deliver the default for the dashboard, which is usually a blank page.

TIP: For detailed instructions on using and modifying customizations, please review the Using Customizations in EBI job aid.

Creating the Customization:

1. Select the Prompt values you wish to use and run the dashboard.

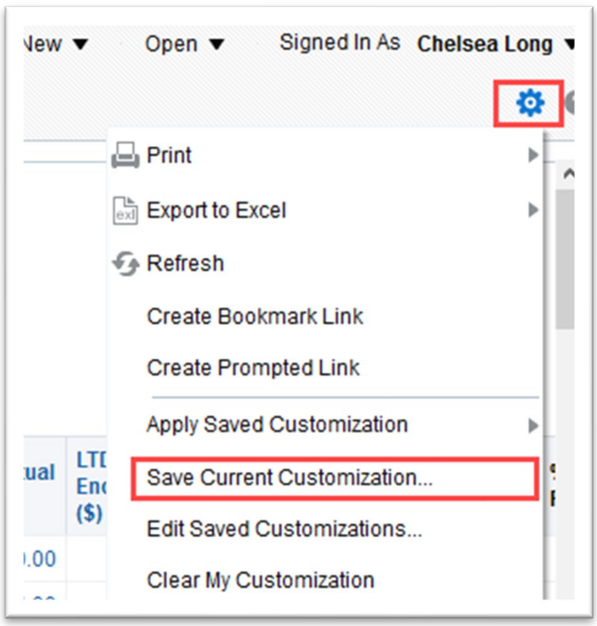
2. Make any customizations you need to the dashboard or report layout. Customizations include, but are not limited to:

a. Modifying the report layout by Including, Excluding, or moving Columns
b. Adding/removing Subtotals or Grand Totals
c. Choosing a view from a View Selector
d. Collapsing or expanding Sections on the dashboard, such as the Prompt section

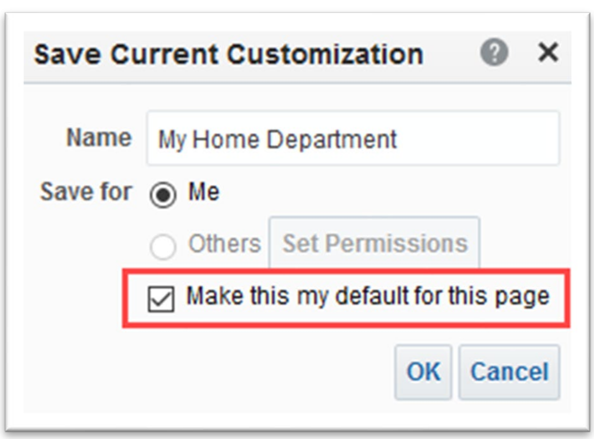
TIP: Agents will deliver everything visible on the dashboard, including the Prompt and Title sections. Collapse the sections that you do not wish to see.

Saving the Customization as your Default Customization:

1. Click the Page Options menu in the top right corner underneath your name. Click Save Current Customization.

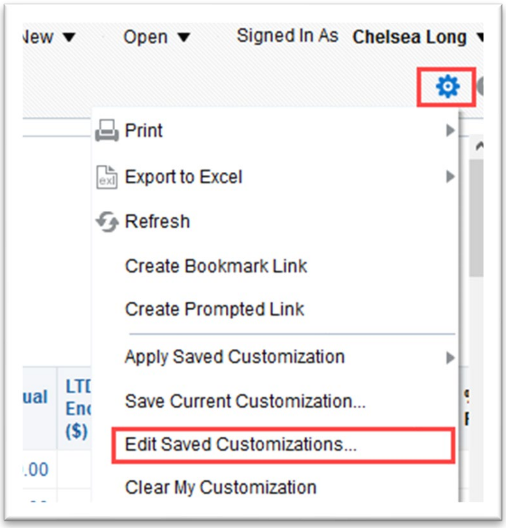


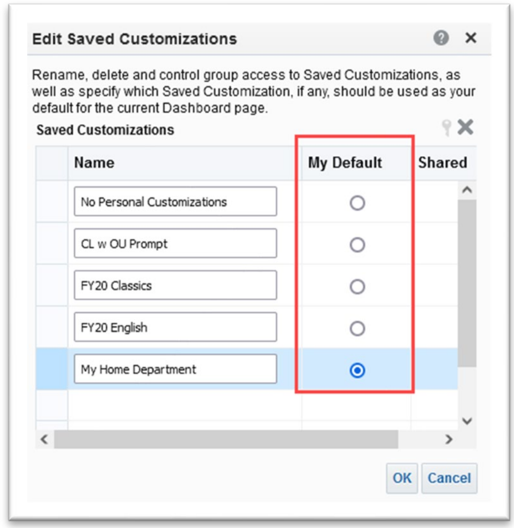
2. Choose a name for your customization, and check the box for "Make this my default for this page"



3. Click 'OK'. Your customization has now been saved and is your Default Customization.

TIP: You can change your Default Customization at any time! You can create a new customization and repeat the above steps, or make an existing customization your default. To choose an existing customization, click the Page Options menu and choose "Edit Saved Customizations…", then simply select another customization.





Dashboards with Agents:

Below is a list of dashboards that currently have agents available for subscription:

Dashboard	Dashboard Page (if applicable)	Agent	Delivery Type*	File Type	Frequency
Sponsored Research Accounts Receivable Aging Report	Accounts Receivable Aging Summary	AR_Aging_Summary_Agent	Email	PDF	Monthly on 2nd Tuesday
	Accounts Receivable Aging Detail	AR_Aging_Detail_Agent	Email	Excel	Monthly on 2nd Tuesday

*Agents with a Delivery Type as Email will be sent from Oracle Delivers <no-reply@oracle.com>

TIP: Looking for the delivered report email? Check your Junk/Spam folder and add the <no-reply@oracle.com> email to your address book.

Related Job Aids:

- Using Customizations in EBI
- Documenting Saved Customizations
- Creating the Chief Business Officer (CBO) Customization for the Sponsored Research Accounts Receivable Aging Report

More Information:

For assistance subscribing to existing agents or to request a new agent, please contact the Data Analytics & Strategic support team via the **Finance Support Center**. Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.