EMORY UNIVERSITY | Enterprise Data Analytics and Strategic Support

Troubleshooting Tips for Using Agents for Delivered Reports from EBI

Overview
If you are experiencing issues with receiving agents delivered to your email inbox, there are a couple of troubleshooting steps that you can take to try and resolve the issue.

- Be sure to use **Chrome as your browser**. This is especially important when subscribing to agents using the links on the dashboard.
- Users must change their Delivery Options in their My Account settings.
- Users must create a Default Customization for the dashboard/dashboard page that uses the agent.
- Check your Junk/Spam folder and add the no-reply@oracle.com email to your address book.
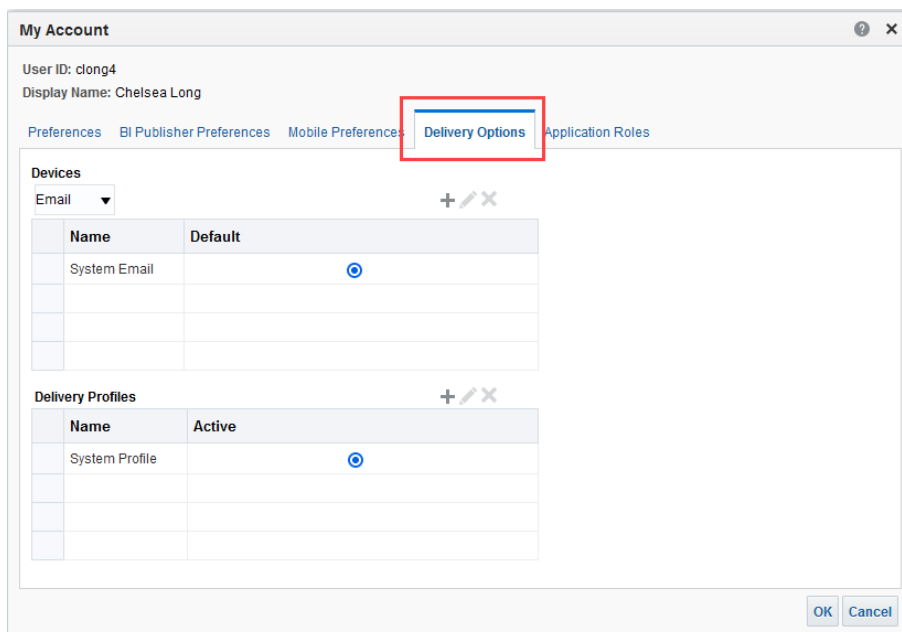
Change Your Delivery Options
All users **MUST** change their Delivery Options in their My Account settings in order to successfully receive the delivered reports. **You will only need to change your Delivery Options once**, and it will apply to all Agents you are subscribed to.

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

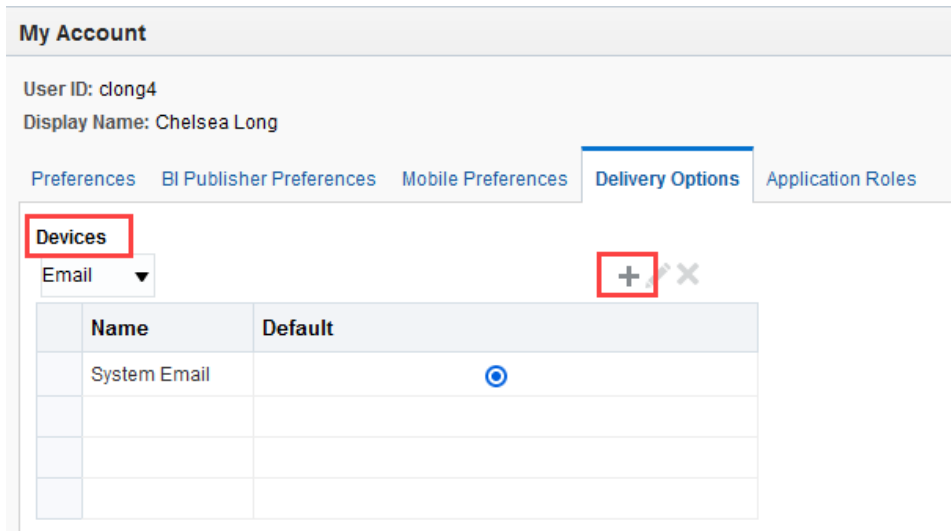2. Navigate to the upper right corner of the browser and click on your name. Then click "My Account"
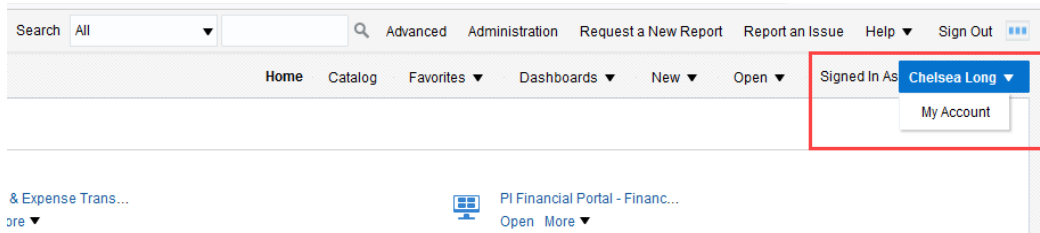
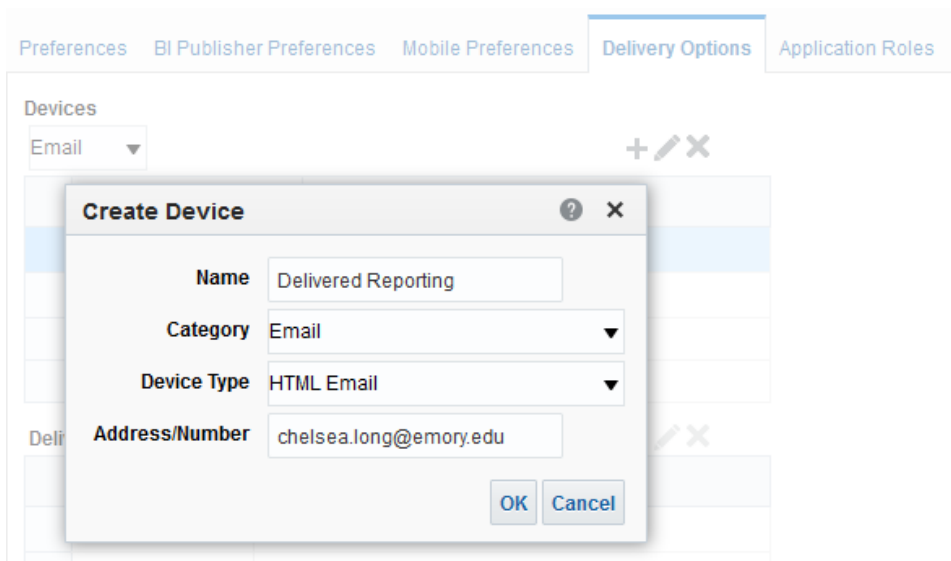3. Select the Delivery Options tab in the My Account window.

4. In the Devices section, click the ' + ' button.

My Account

User ID: clong4
Display Name: Chelsea Long

Preferences   BI Publisher Preferences   Mobile Preferences   **Delivery Options**   Application Roles

Devices

Email ▼   **+ ✎ ✕**

Name	Default
System Email	◉

5. In the Create a Device pop up box, enter the following details:

Preferences   BI Publisher Preferences   Mobile Preferences   **Delivery Options**   Application Roles

Devices

Email ▼   + ✎ ✕

Create Device   ❓ ✕

Name	Delivered Reporting
Category	Email ▼
Device Type	HTML Email ▼
Address/Number	chelsea.long@emory.edu

   OK   Cancel

- **Name:** Delivered Reporting
- **Category:** Email
- **Device Type:** HTML Email
- **Address/Number:** ENTER YOUR PREFERRED EMORY EMAIL ADDRESS

NOTE: You MUST choose these settings and enter your Emory email address. You may not receive the delivered reports if you select other settings.

EMORY UNIVERSITY | Enterprise Data Analytics and Strategic Support

6. Click OK, and make sure the Delivered Reporting device is selected as the Default. Click OK again.
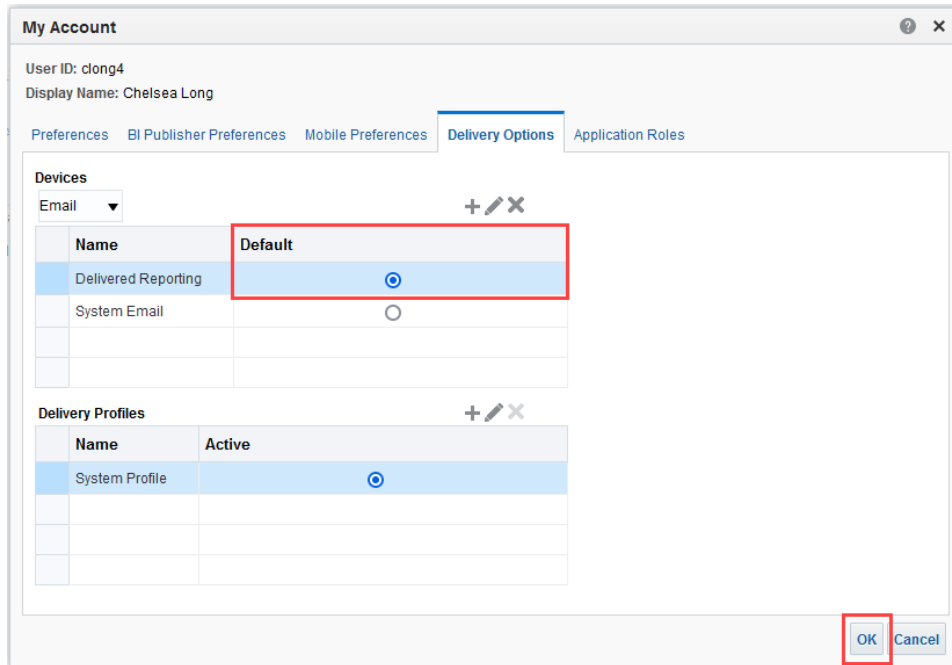
You have successfully updated your Delivery Options and can now subscribe to the Agent(s). **Remember, you only need to update your Delivery Options one time!**

Create a Default Customization

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.
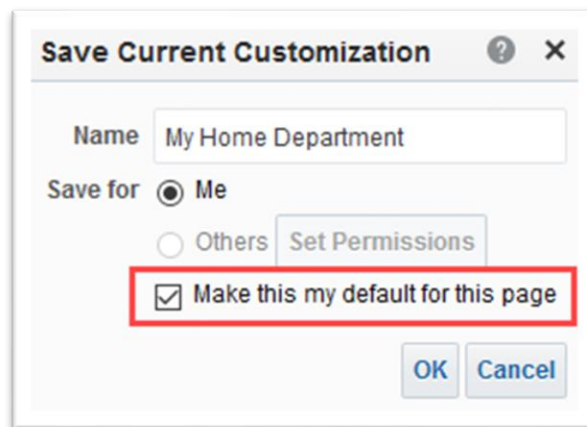
Saving the Customization as your Default Customization:

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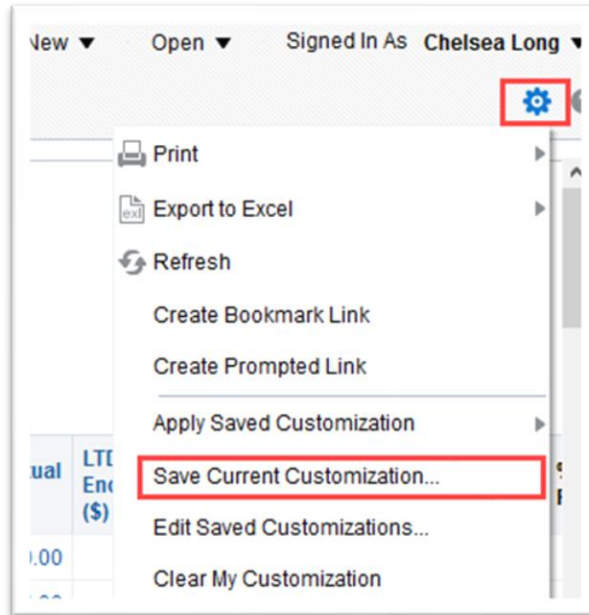

2. Choose a name for your customization, and check the box for "Make this my default for this page"

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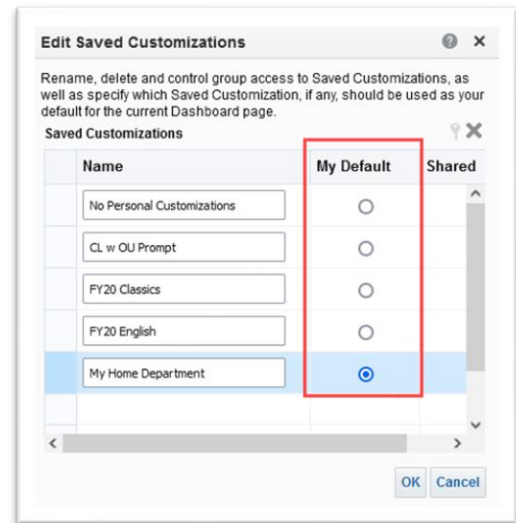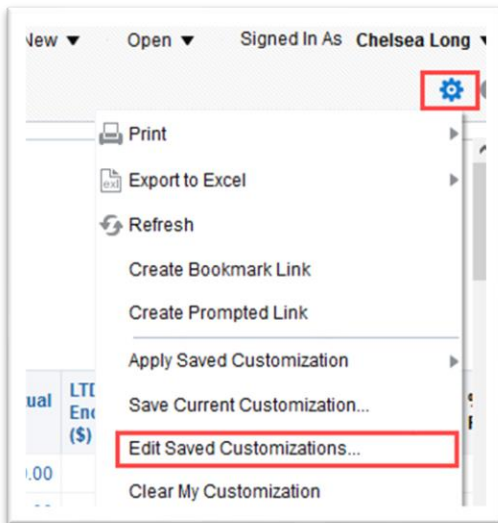
TIP: Check your Junk/Spam folder and add the no-reply@oracle.com email to your address book to receive the delivered report email.

Related Job Aids:

- Using Agents for Delivered Reports from EBI
- Using Customizations in EBI
- Documenting Saved Customizations

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.