



## Using Agents for Delivered Reports from EBI

### Overview

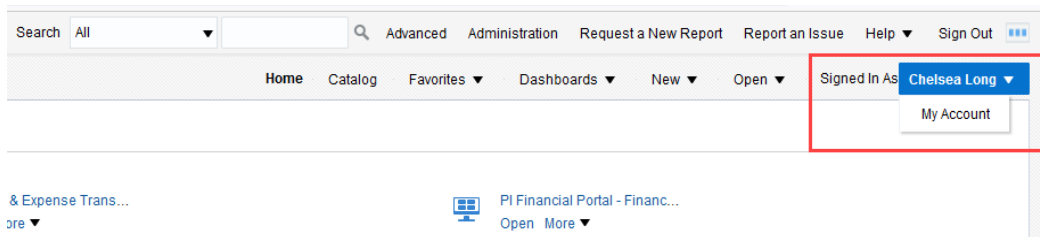
Agents are used to deliver dashboards/reports from EBI to an end user's email inbox.

- 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 change their Delivery Options in their My Account settings
- Users must create a Default Customization for the dashboard/dashboard page that uses the agent

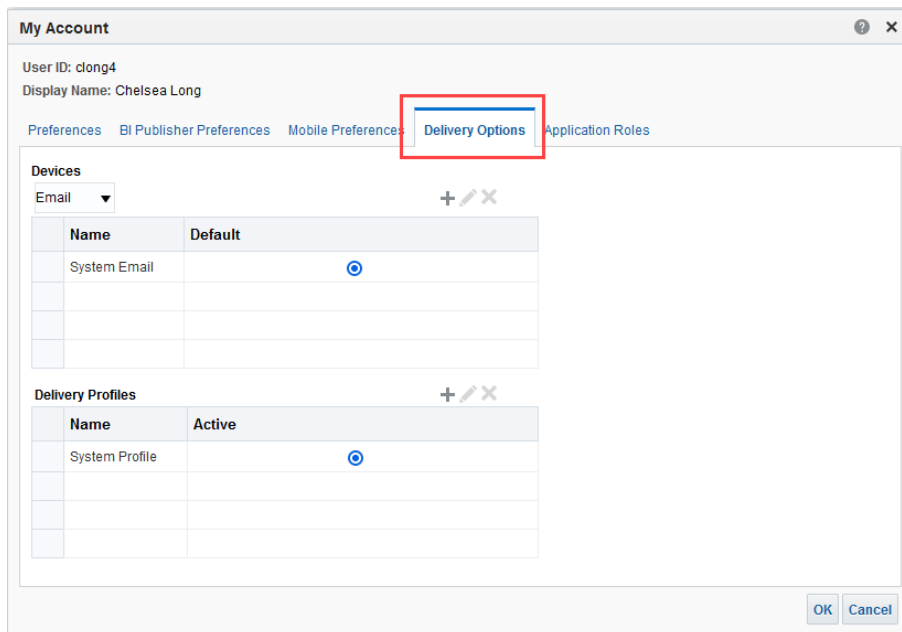
### How do I change my Delivery Options to receive reports?

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	<input checked="" type="radio"/>

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

Category

Device Type

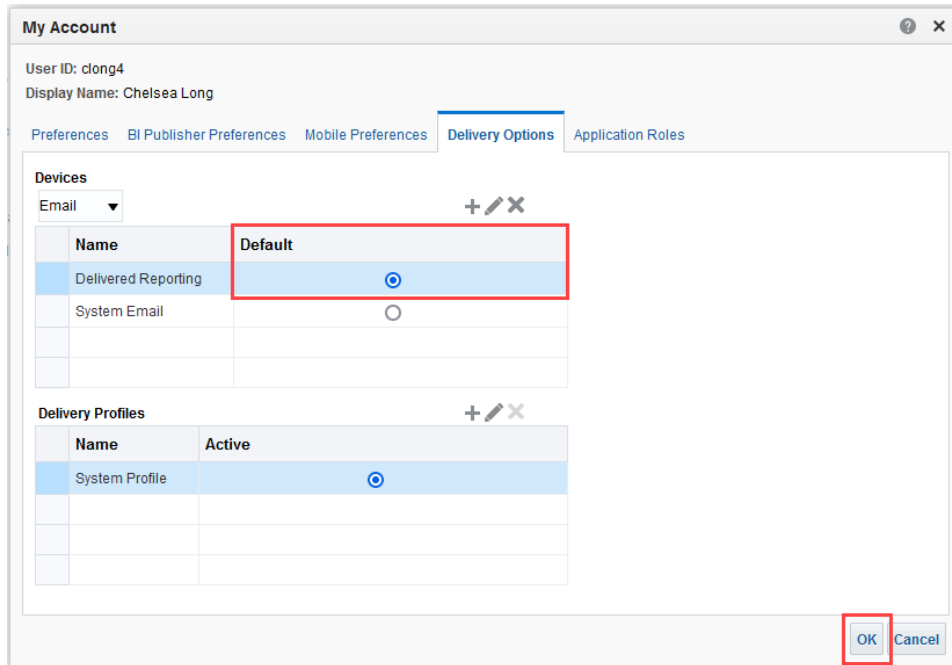
Address/Number

- **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.



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!**

## How do I subscribe/unsubscribe to an Agent?

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

### Subscribing to an Agent:

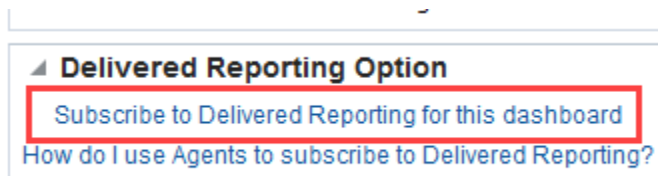
1. Log in to EBI using **Chrome as your browser**.

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

2. Navigate to the dashboard that you want delivered.

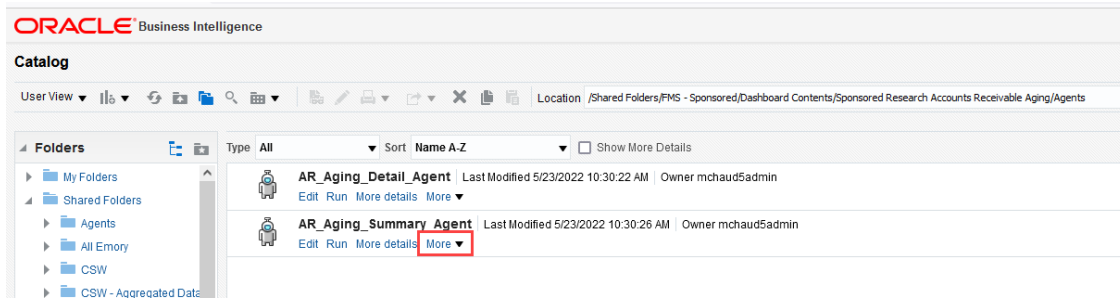
**NOTE:** If a dashboard has multiple dashboard pages, it may have different agents per page. You will need to subscribe to each agent individually.

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

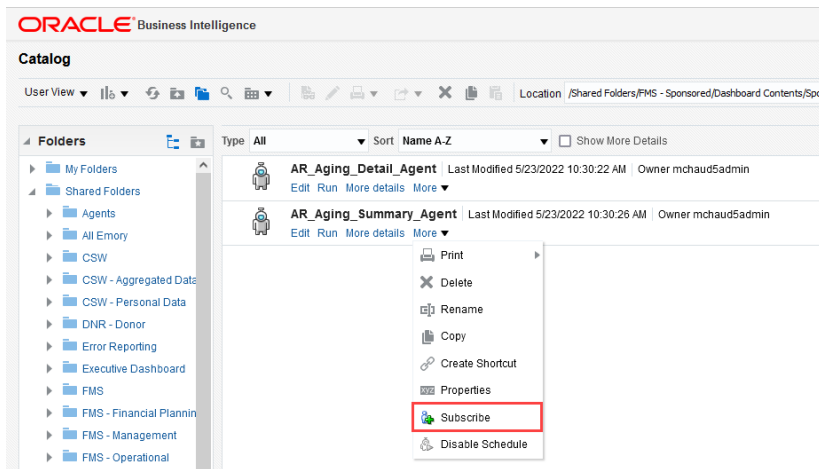




4. Locate the Agent and click “More”

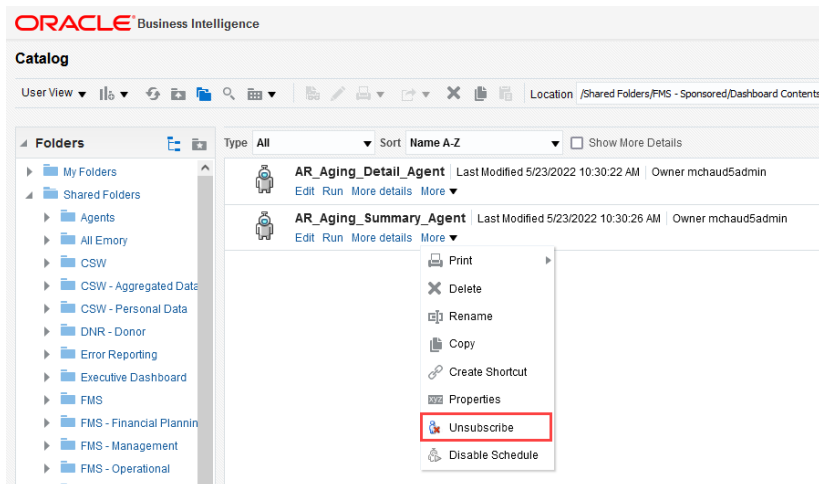


5. Select “Subscribe”



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](#).

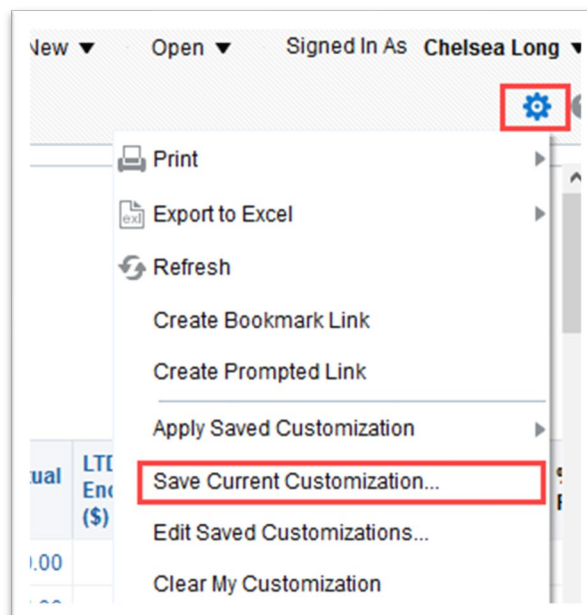
### Creating the Customization:

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.

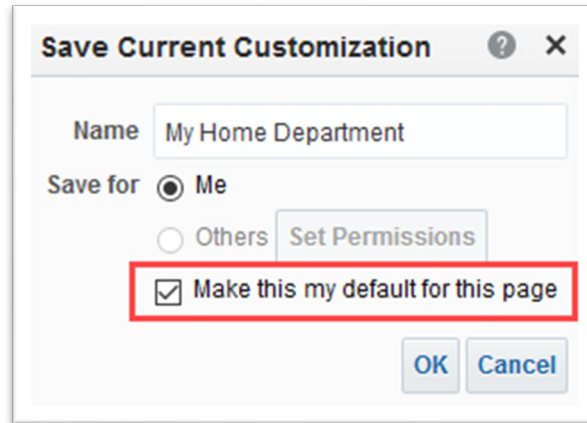
### Saving the Customization as your Default Customization:

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



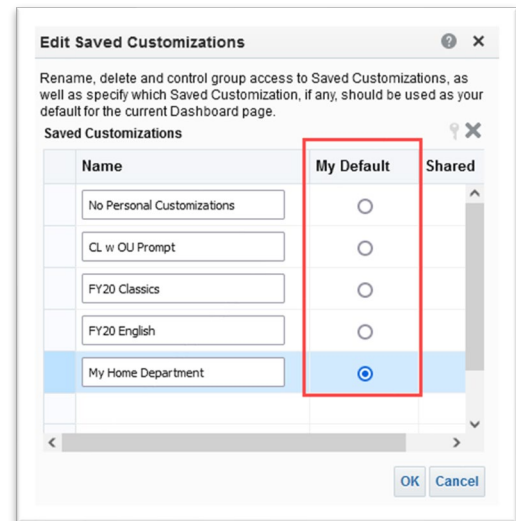
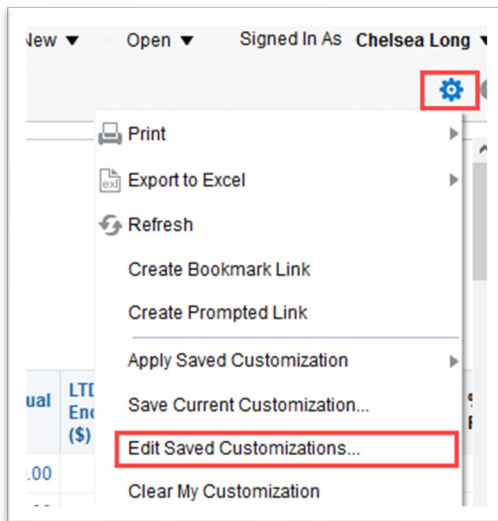


2. Choose a name for your customization, and check the box for “Make this my default for this page”



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
Campus Life Financial Reporting	Campus Life Financial Reporting	CL_UOB_Agent	Email	Excel	Monthly on 2 <sup>nd</sup> Thursday
Sponsored Research Accounts Receivable Aging Report	Accounts Receivable Aging Summary	AR_Aging_Summary_Agent	Email	PDF	Monthly on 2 <sup>nd</sup> Tuesday
	Accounts Receivable Aging Detail	AR_Aging_Detail_Agent	Email	Excel	Monthly on 2 <sup>nd</sup> 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.