


## Build Your Own Report: Using an “Agent” to Schedule a Custom Report

Part 2/2

Scott Shull  
Proquest Workflow Solutions  
[scott.shull@proquest.com](mailto:scott.shull@proquest.com)

July 2015




---

---

---

---


---

---

---

---

### Agenda



- **Webinar Objectives**
- **Schedule Agent Functions & FYIs**
- **Locating Your Saved Analysis**
  - Catalog Page
- **Schedule Agent Workflows**
  - Launching the Schedule Agent
  - Creating an Agent
  - Saving the Agent
  - Viewing Saved Agent
- **Support Resources**

7/15/2015 2

---

---

---

---


---

---

---

---

### Webinar Objectives



- Introduce and familiarize you with the basic “Build Your Own Reports” (BYOR) navigation and functionality;
- Understand and simplify the basic workflows for using an Agent to schedule a custom report;
- Provide foundational education that enables you to begin using an Agent to schedule your reports.

7/15/2015 3

---

---

---

---

---

---

---

---

## Scheduling "Agent" Functions



- After a custom Analysis/Report has been created, it's possible to schedule it and send it to designated recipients
- Create "conditions" for the scheduler (e.g. schedule only when there is data available)
- Determine the frequency by which the custom reports are sent

7/15/2015

4

---

---

---

---

---

---

---

---

## Schedule "Agent" FYIs



- Remember in Oracle, an "Agent" is used to schedule Analyses/Reports that you want to email to designated recipients at specific intervals, *automatically*.
- An "Agent" works differently than the Analysis report-building function and needs to be saved as a separate function in Oracle (i.e. you will save the Analysis and the Agent separately).
  - Your library's saved Analyses (Reports) and Agents are visible from the Catalog page.

7/15/2015

5

---

---

---

---

---

---

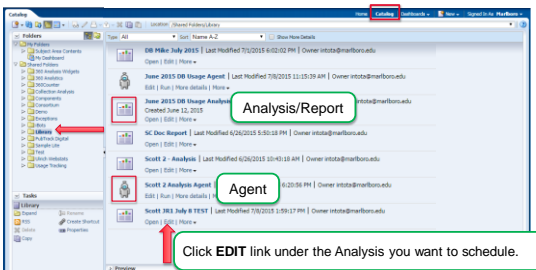
---

---

## Locate the Analysis/Report



Locate your saved Analysis/Report from the Catalog page in your Library folder.



7/15/2015

6

---

---

---

---

---

---

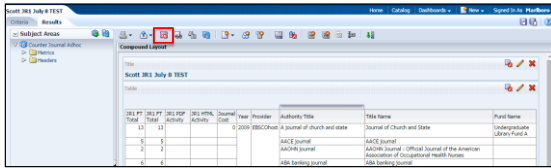
---

---

## Launch the Schedule Agent



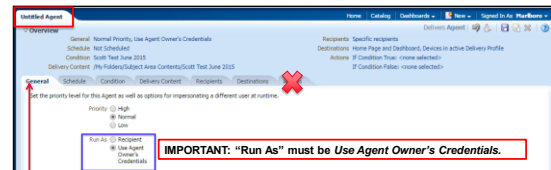
- Launch the Schedule Agent from the Analysis Compound Layout view (Results) using the appropriate (calendar) icon in the toolbar.



7/15/2015

7

## Schedule Agent - General Tab

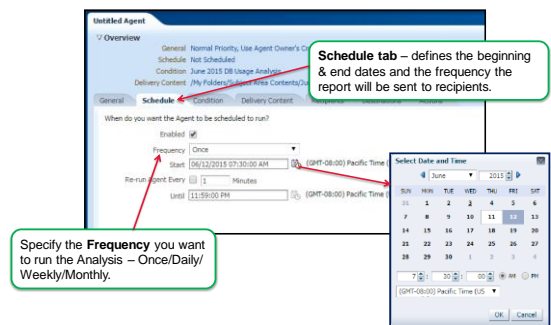


General tab settings of the Agent let you set the priority of the report.

7/15/2015

8

## Schedule Agent - Schedule Tab



7/15/2015

9

### Schedule Agent – Condition Tab

**Condition tab** – Use the pencil icon to create a condition for running the report, such as a row being over "0".

7/15/2015 10

---

---

---

---

---

---

---

---

### Schedule Agent - Delivery Content Tab

**Delivery Content tab** – defines how and in what format you want to send your Analysis/Report:

- Subject** of the email containing the scheduled Analysis/Report
- Content Menu:** You must select **Analysis**; click Browse to select the report you want to schedule.
- Format of the Analysis** HTML, .pdf, Excel, PPT, CSV, Tab Delimited
- Delivery mode** will choose attachment to email by default

7/15/2015 11

---

---

---

---

---

---

---

---

### Schedule: Recipients Tab

Click "Add Email Recipient" and enter the email address when the dialog box opens then Click OK. Repeat to add more recipients.

7/15/2015 12

---

---

---

---

---

---

---

---

### Schedule - "Agent" Destinations

Home Page and Dashboard Destination will make your Analysis/Report visible on the Customization Home Page.

Destinations tab – Specifies how the scheduled report (Agent) will be delivered.

7/15/2015 13

### Schedule Agent – Destinations Tab

Click the "Run Agent Now" icon (test) the scheduler Agent.


7/15/2015 14

### Save the Agent

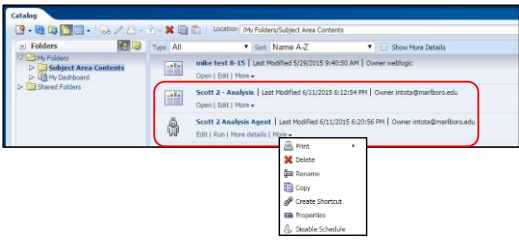
Save the Agent

This is critical! Otherwise the Agent will override your previously saved Analysis.

7/15/2015 15

**Viewing/ Editing Your New Report** 

View your saved Agent on the Catalog page along with your previously saved Analyses.



7/15/2015 16

---

---

---


---

---

---

---

---

**Support Resources** 

- [Build Your Own Reports: Schedule a Custom Report](#)
- [Intota Assessment User Guide](#)
- [Build Your Own Reports \(Part 1\)](#)
- [Presentation PPT Slides](#)  
For this webinar and all publicly offered webinar trainings.

7/15/2015 17

---

---

---

---

---

---

---

---

**THANK YOU!**

<http://www.proquest.com/go/trainingeval>

---

---

---

---

---

---

---

---