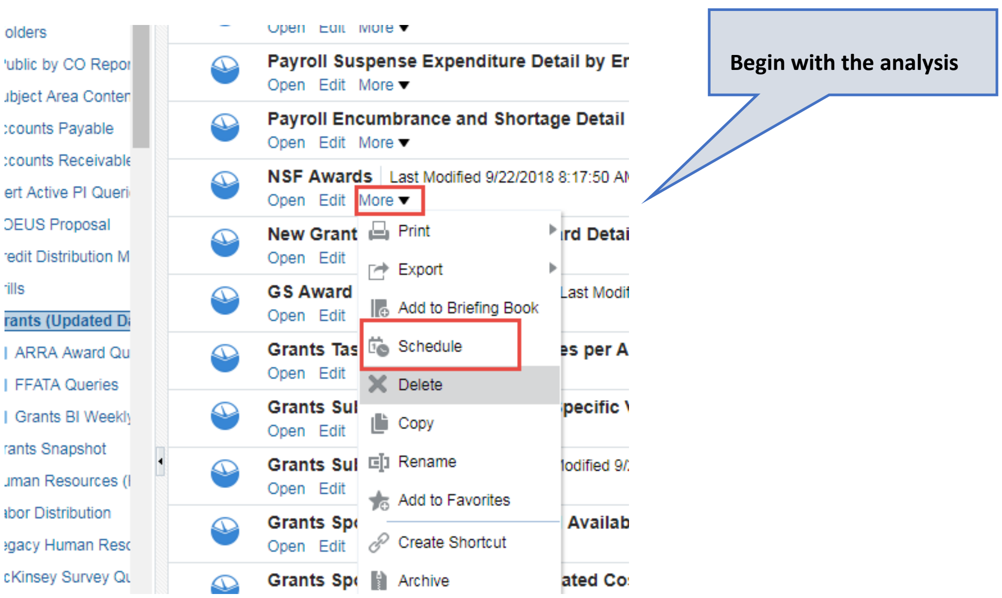
How to Schedule Agents (Reports)

Once you are logged in the Report Center, there are many ways to **Schedule Agents;** this document will outline the steps for the recommended approach which is, to begin with, your analysis so that it is automatically added to the agent.

Steps

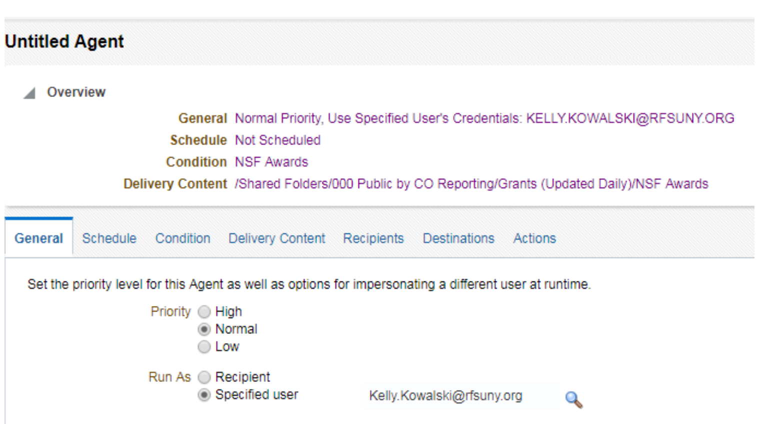
1. Click the **More** button and select **Schedule**.



2. General Tab – Complete the following sections.

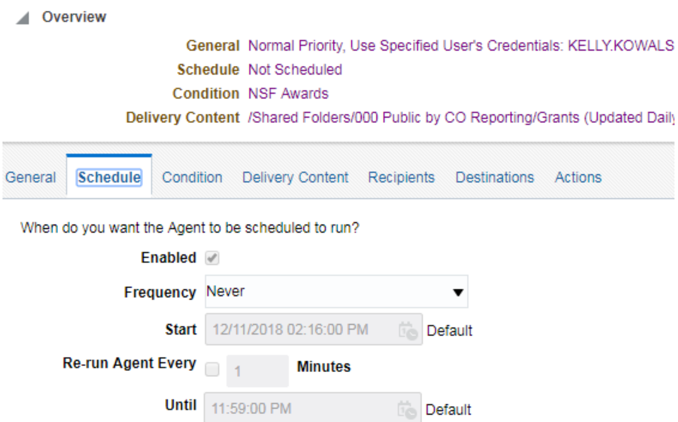
   Priority: Specify the priority of the delivery content that an agent is to deliver and how to send the delivery content.

   Run As: Select Specified User – your email address will automatically be populated.

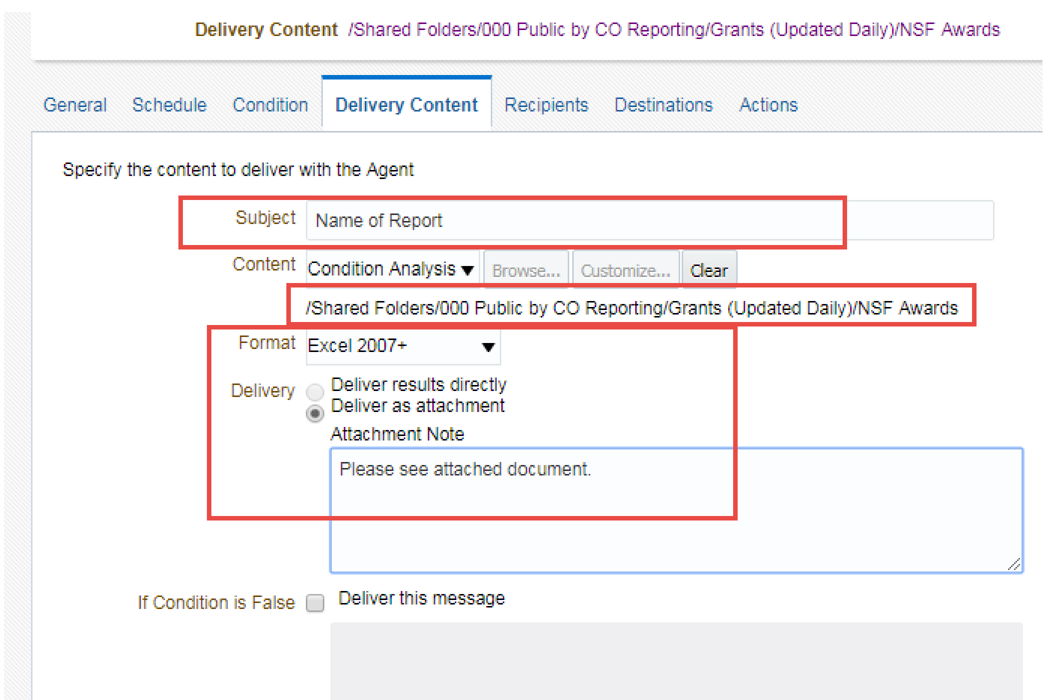


3. Schedule Tab –The Schedule tab specifies when an agent runs, how often it runs, and when it should be discontinued. There are three parts to an Agent schedule:
    - Start date and time
    - Frequency
    - End date and time

Use the Frequency drop-down list to specify how often the agent runs.

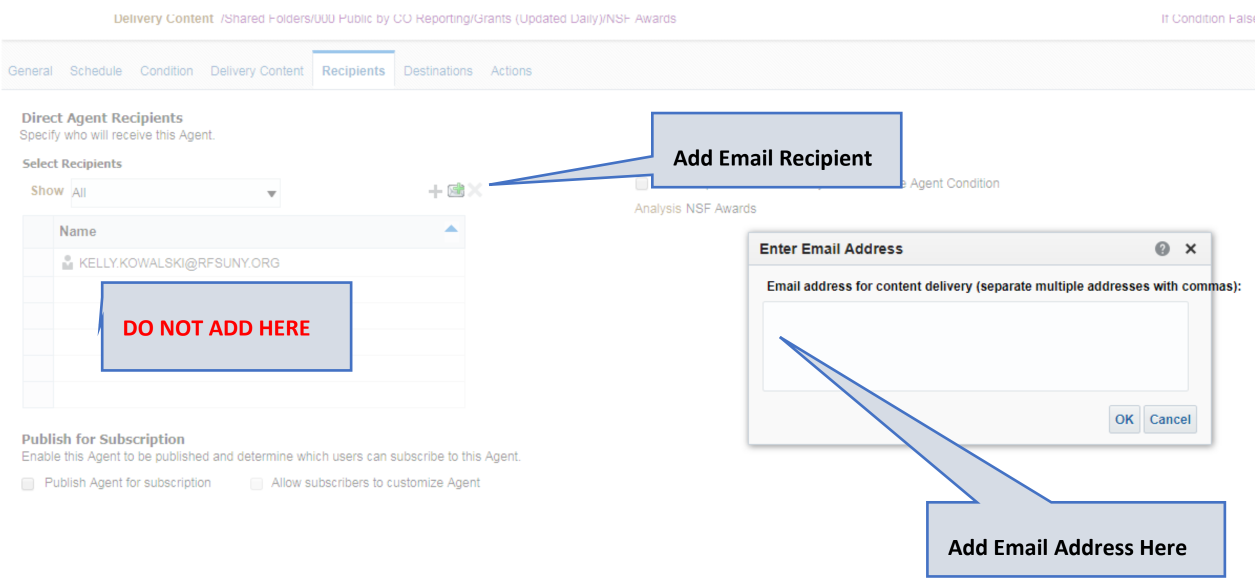


4. Delivery Content Tab –Specify the content to be delivered by the agent. You can specify the following:
    a. **Subject:** The subject line to include with the content
    b. **Format:** The delivery format for the content such as PDF or Excel.
    c. **Delivery:** The recommended setting is 'Deliver as attachment.'
    d. **Attachment Note:** You can attach a note that will be part of the email body.
    e. **If Condition is False**: Select the "If Condition is False" check box to specify whether to deliver a text message to the recipient when there is no agent content to deliver to them and then enter the text message to be delivered.



5. Recipients Tab - Specify who should receive the delivery content of the agent.

   Add email recipients by clicking on the email icon.



6. You will need to Save the agent to your directory.