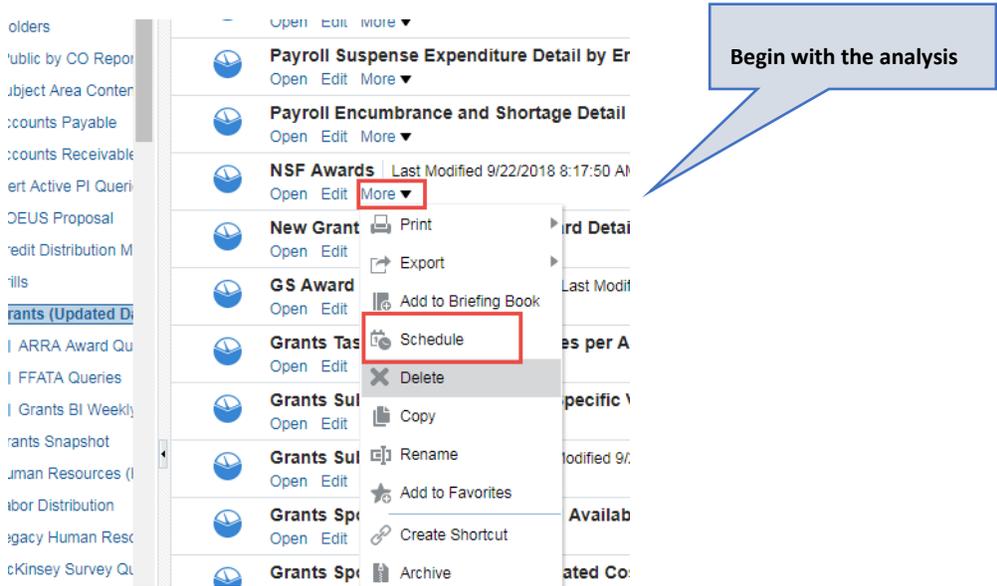


## How to Schedule Agents (Reports)

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.

**Untitled Agent**

Overview

**General** Normal Priority, Use Specified User's Credentials: KELLY.KOWALSKI@RFSUNY.ORG

**Schedule** Not Scheduled

**Condition** NSF Awards

**Delivery Content** /Shared Folders/000 Public by CO Reporting/Grants (Updated Daily)/NSF Awards

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General | Schedule | Condition | Delivery Content | Recipients | Destinations | Actions

Set the priority level for this Agent as well as options for impersonating a different user at runtime.

Priority  High  
 Normal  
 Low

Run As  Recipient  
 Specified user Kelly.Kowalski@rfsuny.org

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.

Overview

General Normal Priority, Use Specified User's Credentials: KELLY.KOWALS

Schedule Not Scheduled

Condition NSF Awards

Delivery Content /Shared Folders/000 Public by CO Reporting/Grants (Updated Daily)

General **Schedule** Condition Delivery Content Recipients Destinations Actions

When do you want the Agent to be scheduled to run?

Enabled

Frequency Never

Start 12/11/2018 02:16:00 PM Default

Re-run Agent Every 1 Minutes

Until 11:59:00 PM Default

4. Delivery Content Tab –Specify the content to be delivered by the agent. You can specify the following:

- Subject:** The subject line to include with the content
- Format:** The delivery format for the content such as PDF or Excel.
- Delivery:** The recommended setting is 'Deliver as attachment.'
- Attachment Note:** You can attach a note that will be part of the email body.
- 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.

Delivery Content /Shared Folders/000 Public by CO Reporting/Grants (Updated Daily)/NSF Awards

General Schedule Condition **Delivery Content** Recipients Destinations Actions

Specify the content to deliver with the Agent

Subject Name of Report

Content Condition Analysis Browse... Customize... Clear

/Shared Folders/000 Public by CO Reporting/Grants (Updated Daily)/NSF Awards

Format Excel 2007+

Delivery  Deliver results directly  Deliver as attachment

Attachment Note

Please see attached document.

If Condition is False  Deliver this message

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

Add email recipients by clicking on the email icon.

The screenshot shows the 'Recipients' tab of a web application. At the top, there are tabs for 'General', 'Schedule', 'Condition', 'Delivery Content', 'Recipients', 'Destinations', and 'Actions'. The 'Recipients' tab is active. Below the tabs, there is a section for 'Direct Agent Recipients' with a 'Select Recipients' dropdown and a 'Show All' button. A table lists recipients, with one entry: 'KELLY.KOWALSKI@RFSUNY.ORG'. A red box is overlaid on the table with the text 'DO NOT ADD HERE'. To the right of the table is a '+ e' icon, which is pointed to by a blue callout box containing the text 'Add Email Recipient'. Below the table, there is a 'Publish for Subscription' section with two checkboxes: 'Publish Agent for subscription' and 'Allow subscribers to customize Agent'. To the right of the main interface, there is a dialog box titled 'Enter Email Address' with a text input field and 'OK' and 'Cancel' buttons. A blue callout box points to the input field with the text 'Add Email Address Here'.

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

The screenshot shows a web interface with a 'Save Agent' dialog box open. In the background, there is a 'Delivers Agent' button with a red box around it and a red arrow pointing to it. The 'Save Agent' dialog box has a 'Folders' pane on the left showing 'My Folders' and 'Shared Folders'. The main area shows a file explorer view with a list of files and folders. The 'Name' field is set to 'Untitled' and the 'Description' field is empty. 'OK' and 'Cancel' buttons are at the bottom right of the dialog box.