

OTBI-08 Scheduling a Report

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to schedule an OTBI report in the North Carolina Financial System (**NCFS**).

Introduction and Overview

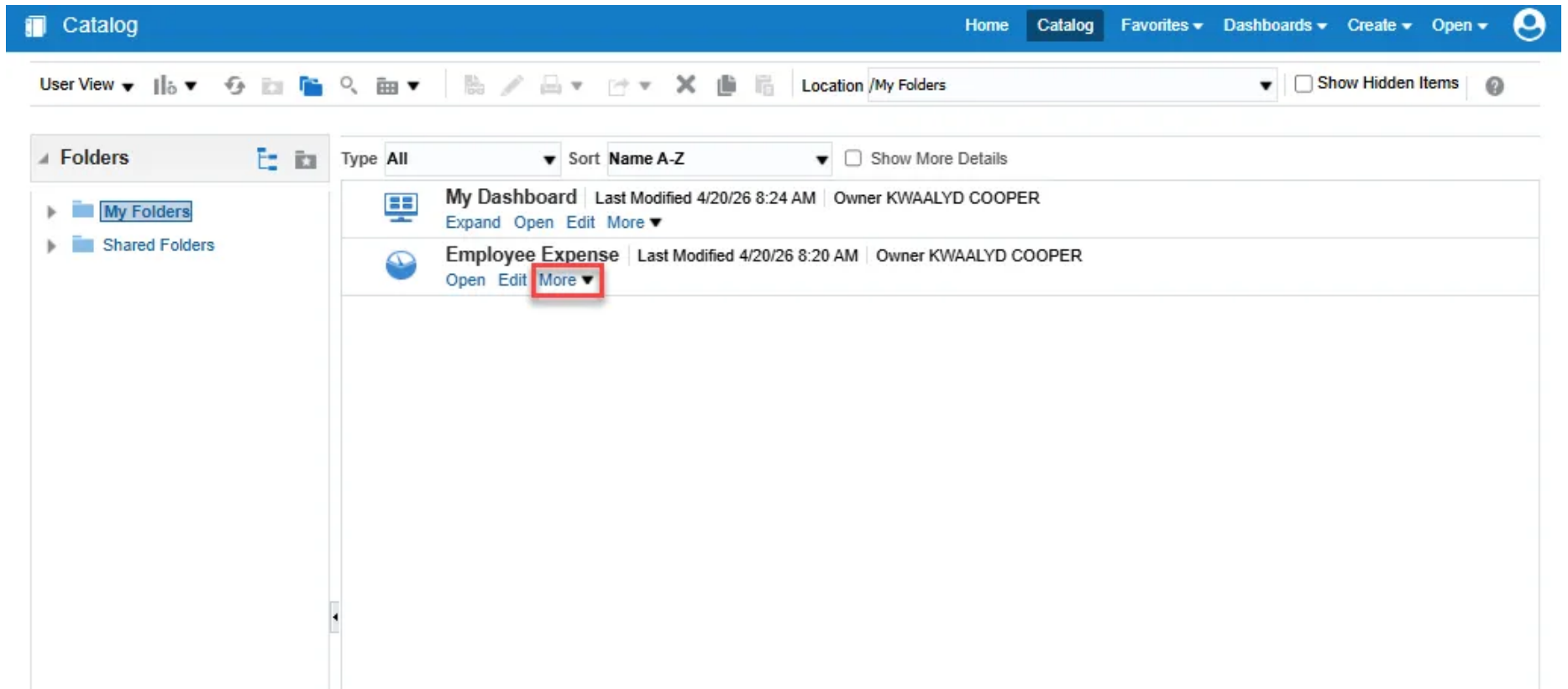
This QRG covers the process of scheduling an OTBI report.

Process

To Schedule a Report, please follow the steps below. There are 12 steps to complete this process.

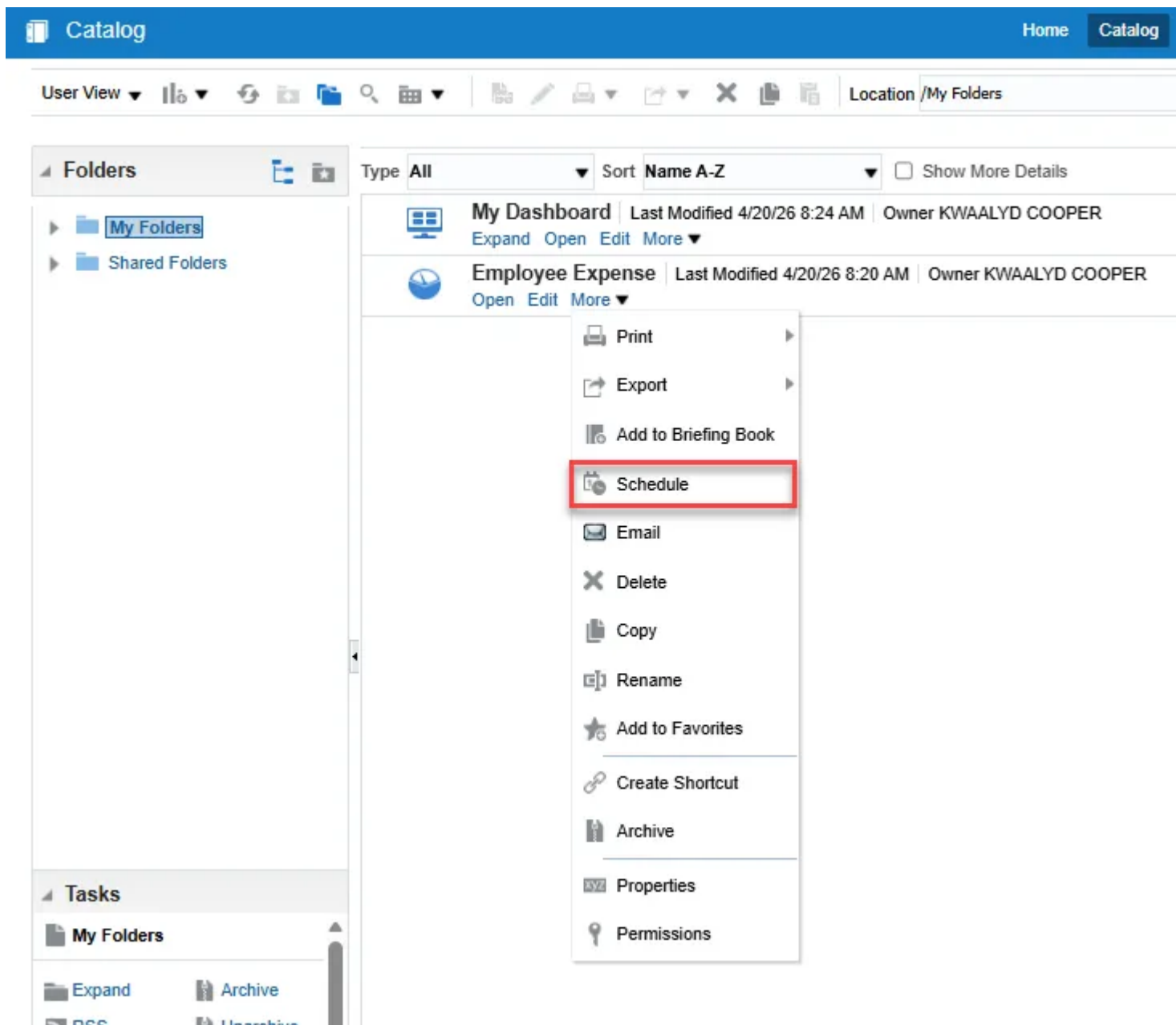
Step 1. Navigate to the **Catalog page** and choose **More** under the report you wish to schedule.

Image



Step 2. Select **Schedule** from the drop-down menu.

Image



Step 3. On the **Untitled Agent** page, choose the **Schedule** tab.

Image

Untitled Agent

Home Catalog Favorites Dashboards Create Open

Overview

Delivers Agent

General Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Schedule Not Scheduled

Condition Employee Expense

Delivery Content /My Folders/Employee Expense

Recipients Specific recipients

Destinations Home Page and Dashboard, Devices in active Delivery Profile

Actions If Condition True: <none selected>
If Condition False: <none selected>

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 KWAALYD COOPER

Step 4. Select the **Frequency** drop-down.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

GeneralNormal Priority, Use Specified User's Credentials: KWAALYD COOPER

ScheduleNot Scheduled

ConditionEmployee Expense

Delivery Content/My Folders/Employee Expense

RecipientsSpecific recipients

DestinationsHome Page and Dashboard, Devices in active Delivery Profile

ActionsIf Condition True: <none selected>
If Condition False: <none selected>

GeneralScheduleConditionDelivery ContentRecipientsDestinationsActions

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

Enabled☒

FrequencyNever

Start05/14/2026 08:47:00 AM (GMT-05:00) Eastern Time (US & Canada)

Re-run Agent Every☐ 15 Minutes

Until11:59:00 PM (GMT-05:00) Eastern Time (US & Canada)

Step 5. Choose the frequency that the report will be generated. For example, **Weekly** has been chosen.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

General

Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Recipients

Specific recipients

Schedule

Not Scheduled

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Condition

Employee Expense

Actions

If Condition True: <none selected>

If Condition False: <none selected>

Delivery Content

/My Folders/Employee Expense

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

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

Enabled

Frequency

Never

Start

Never

05:00) Eastern Time (US & Canada)

Re-run Agent Every

Once

Daily

Until

05:00) Eastern Time (US & Canada)

Weekly

Monthly

Step 6. Choose a **start date** and **time**.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

General

Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Recipients

Specific recipients

Schedule

Not Scheduled

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Condition

Employee Expense

Actions

If Condition True: <none selected>

Delivery Content

/My Folders/Employee Expense

If Condition False: <none selected>

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

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

Enabled

Frequency

Weekly

Every

1

Weeks

On

☐ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Start

05/14/2026 08:47:00 AM

(GMT-05:00) Eastern Time (US & Canada)

Re-run Agent Every

15

Minutes

Until

11:59:00 PM

(GMT-05:00) Eastern Time (US & Canada)

End

☒ No end date

☐ Select end date

05/14/2026

Step 7. Choose an **end date** if applicable.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

General

Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Recipients

Specific recipients

Schedule

Not Scheduled

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Condition

Employee Expense

Actions

If Condition True: <none selected>

Delivery Content

/My Folders/Employee Expense

If Condition False: <none selected>

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

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

Enabled

Frequency

Weekly

Every

1

Weeks

On

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Start

05/14/2026 08:47:00 AM

(GMT-05:00) Eastern Time (US & Canada)

Re-run Agent Every

15

Minutes

Until

11:59:00 PM

(GMT-05:00) Eastern Time (US & Canada)

End

No end date

Select end date

05/14/2026

Step 8. Select the **Recipients** tab.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

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

Enabled

Frequency

Every

Weeks

On

Start

Re-run Agent Every

Minutes

Until

End

Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Specific recipients

Home Page and Dashboard, Devices in active Delivery Profile

If Condition True: <none selected>

If Condition False: <none selected>

Not Scheduled

Employee Expense

/My Folders/Employee Expense

Weekly

1

Weeks

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

05/14/2026 08:47:00 AM

(GMT-05:00) Eastern Time (US & Canada)

15

Minutes

11:59:00 PM

(GMT-05:00) Eastern Time (US & Canada)

No end date

Select end date

05/14/2026

Step 9. Choose the **Plus** button to add an NCFS user as a recipient. This will deliver the analysis to their home page.

Image

Untitled Agent

HomeCatalogFavoritesDashboardsCreateOpen

Overview

Delivers Agent

GeneralNormal Priority, Use Specified User's Credentials: KWAALYD COOPER

ScheduleNot Scheduled Recur weekly

ConditionDo not use a condition (always deliver content and run actions)

Delivery Content<none selected>

RecipientsSpecific recipients

DestinationsHome Page and Dashboard, Devices in active Delivery Profile

Actions<none selected>

GeneralScheduleConditionDelivery ContentRecipientsDestinationsActions

Direct Agent Recipients

Specify who will receive this Agent.

Select Recipients

ShowAll

Name
KWAALYD COOPER

Use Analysis

☐ Get Recipients from the Analysis Used in the Agent Condition

Analysis

Publish for Subscription

Enable this Agent to be published and determine which users can subscribe to this Agent.

☐ Publish Agent for subscription

☐ Allow subscribers to customize Agent

Step 10. Choose the **Email** icon to add a recipient that will receive the analysis by email.

Image

Untitled Agent

HomeCatalogFavorites ▾Dashboards ▾Create ▾Open ▾

Overview

Delivers Agent 

General

Normal Priority, Use Specified User's Credentials: KWAALYD COOPER

Schedule

Not Scheduled Recur weekly

Condition

Do not use a condition (always deliver content and run actions)

Delivery Content

<none selected>

Recipients

Specific recipients

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Actions

<none selected>

GeneralScheduleConditionDelivery ContentRecipientsDestinationsActions

Direct Agent Recipients

Specify who will receive this Agent.

Select Recipients

Show

All ▾



Name
 KWAALYD COOPER

Use Analysis

☐ Get Recipients from the Analysis Used in the Agent Condition

Analysis

Publish for Subscription

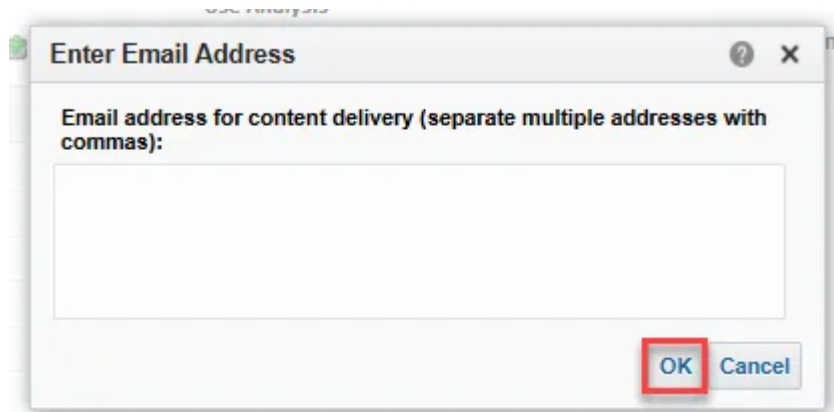
Enable this Agent to be published and determine which users can subscribe to this Agent.

☐ Publish Agent for subscription

☐ Allow subscribers to customize Agent

Step 11. Enter **email addresses** for recipients and choose **OK**.

Image



Step 12. Select the **Save** button in the upper right to save the Agent. The analysis will generate at the scheduled day/time.

Image



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