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

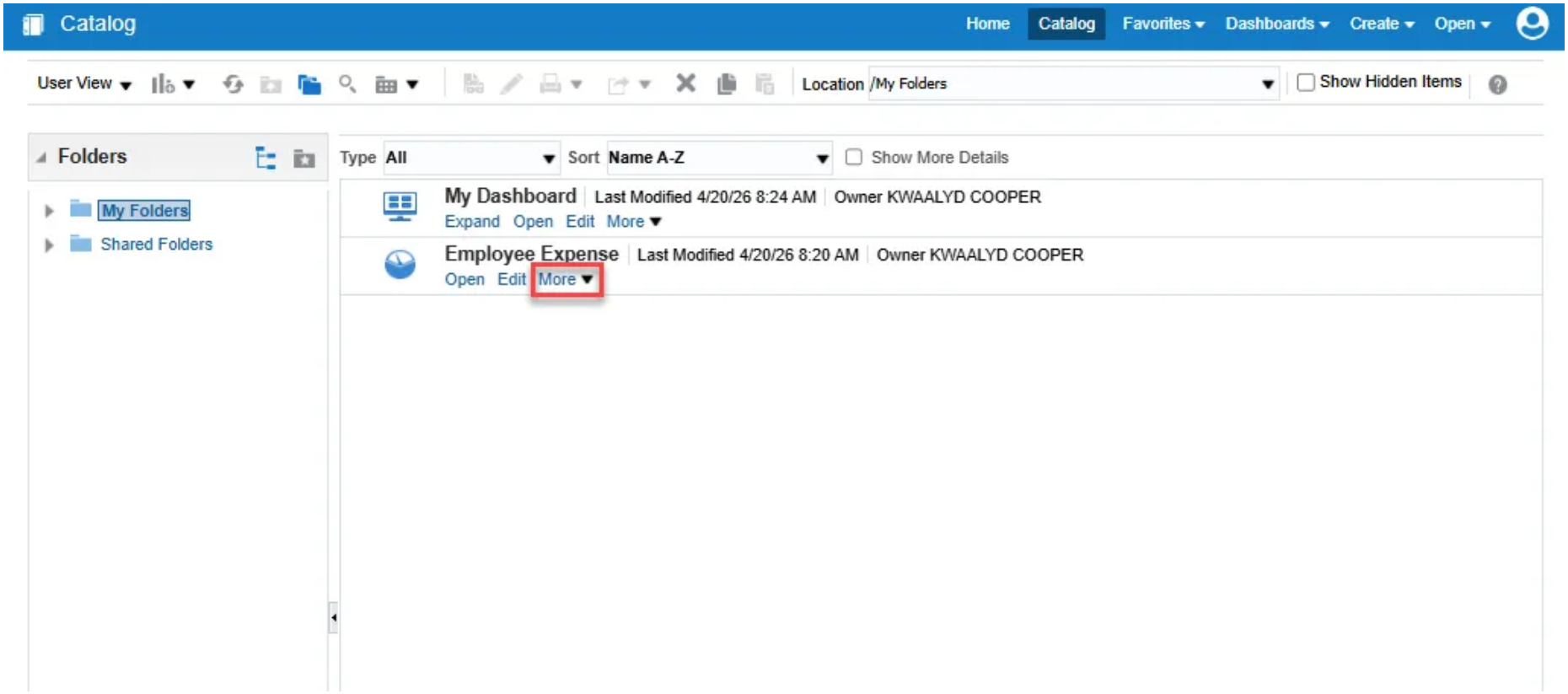
This QRG covers the process of scheduling an OTBI report.

Process

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

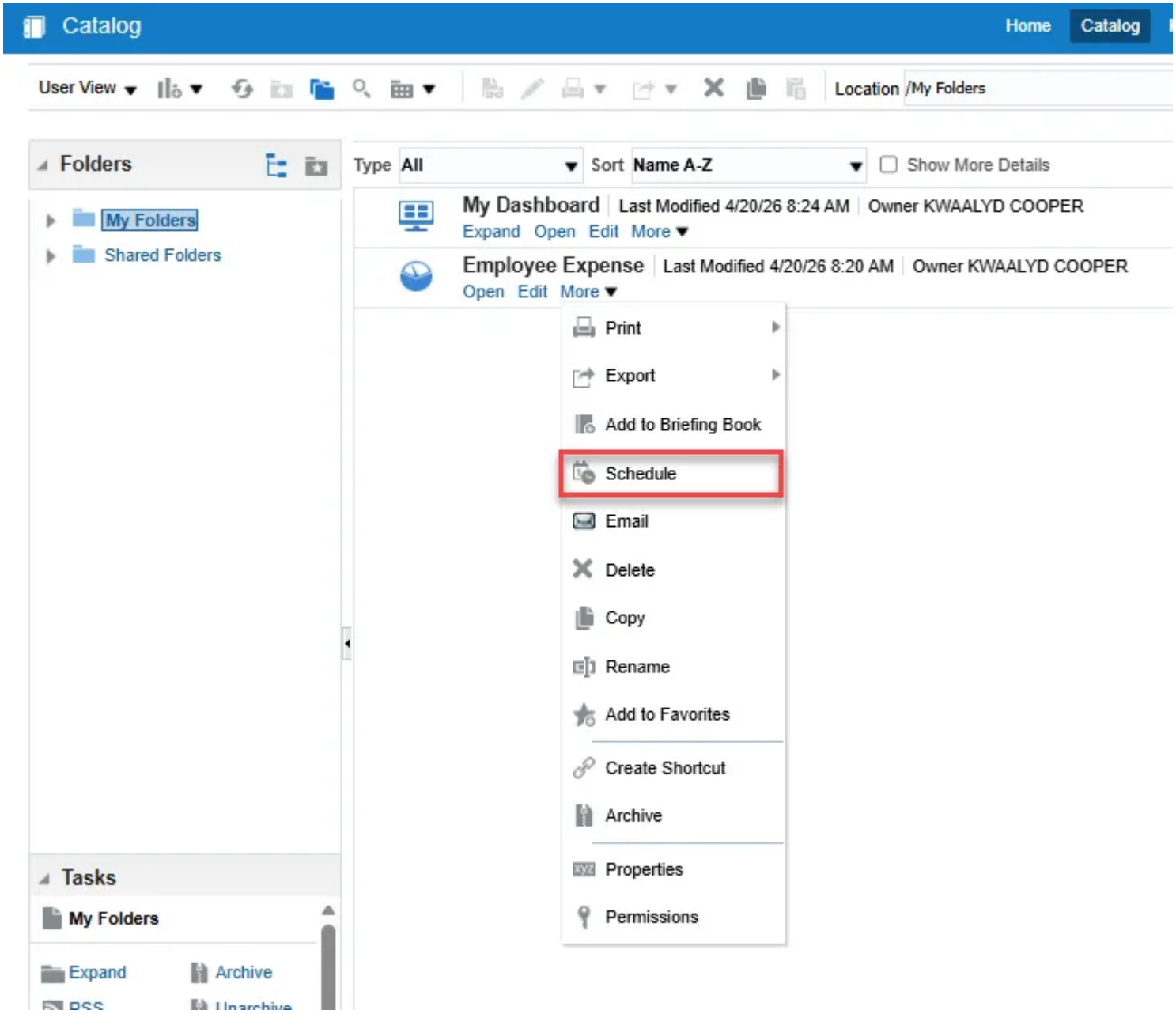
Step 1. Navigate to the **Catalog page** and choose **More** under the report you wish to schedule.

Image



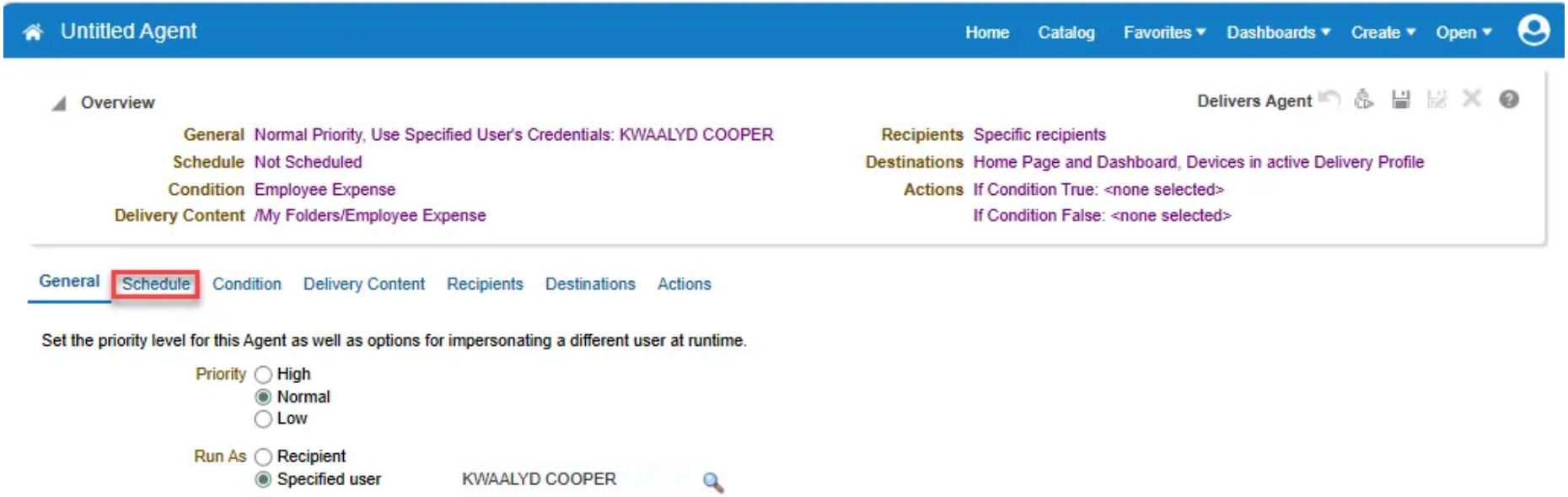
Step 2. Select **Schedule** from the drop-down menu.

Image



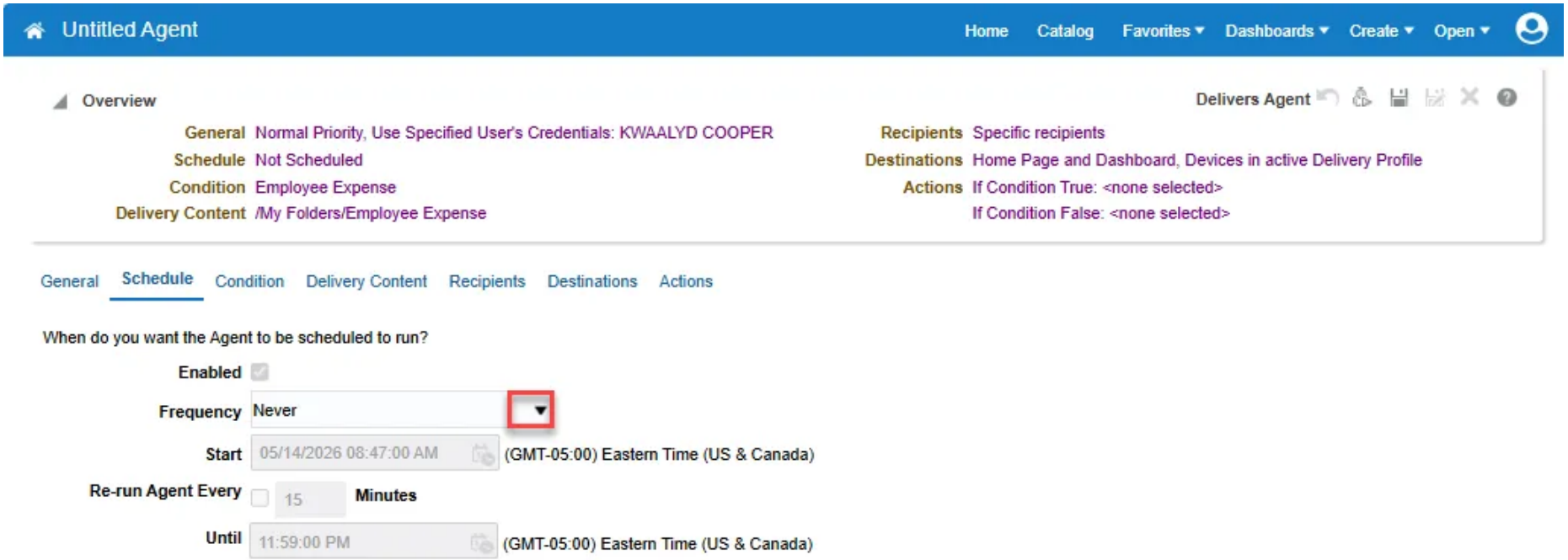
Step 3. On the **Untitled Agent** page, choose the **Schedule** tab.

Image



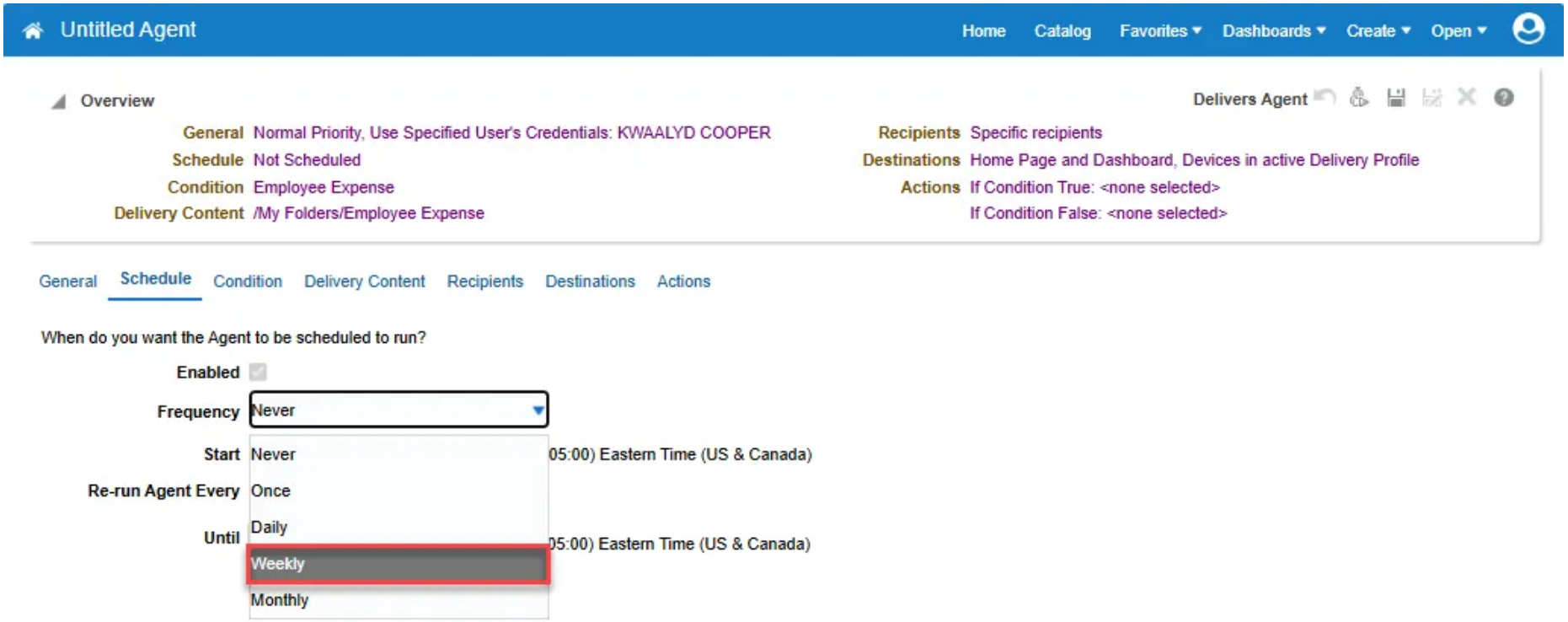
Step 4. Select the **Frequency** drop-down.

Image



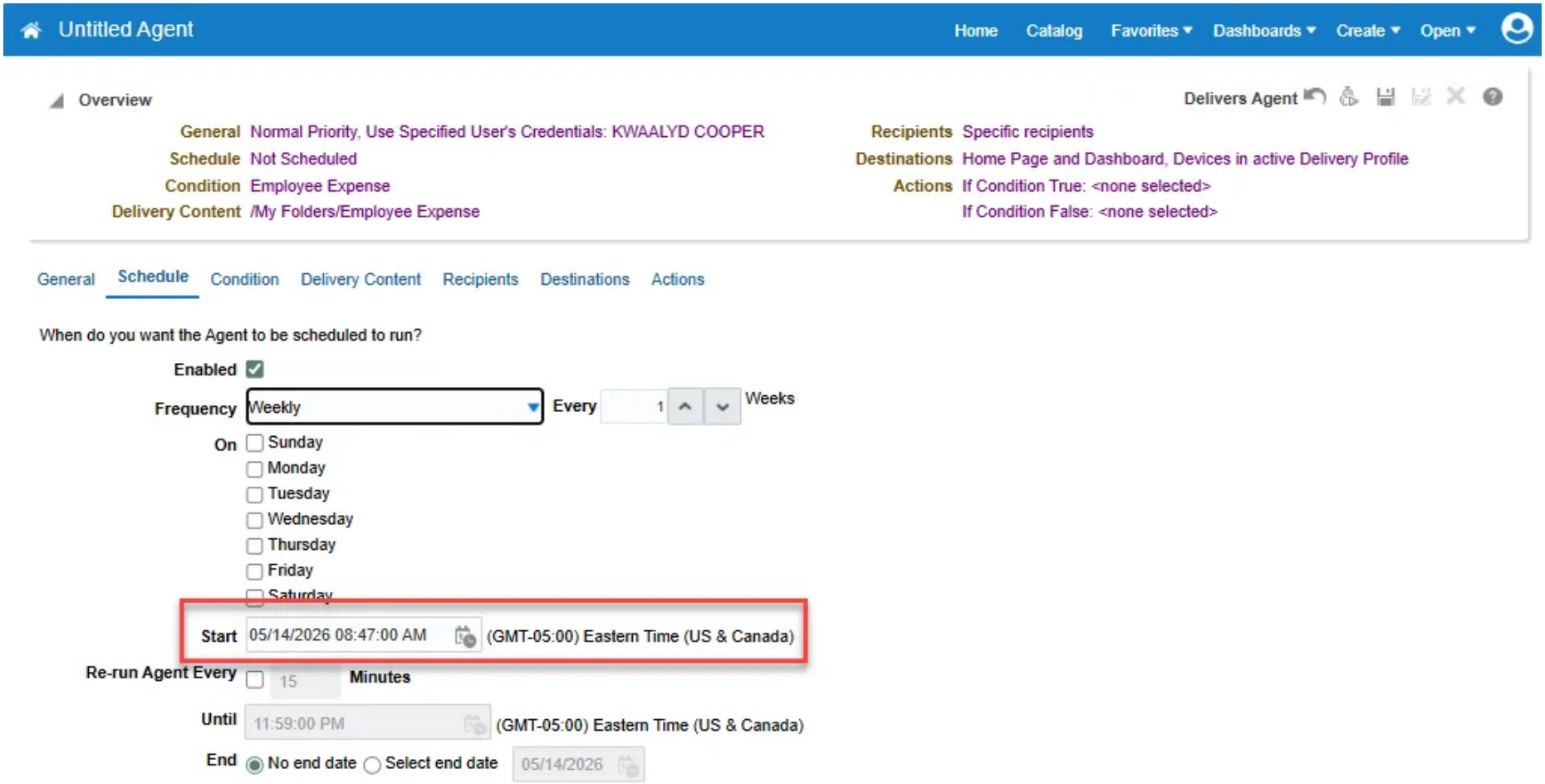
Step 5. Choose the frequency that the report will be generated. For example, **Weekly** has been chosen.

Image



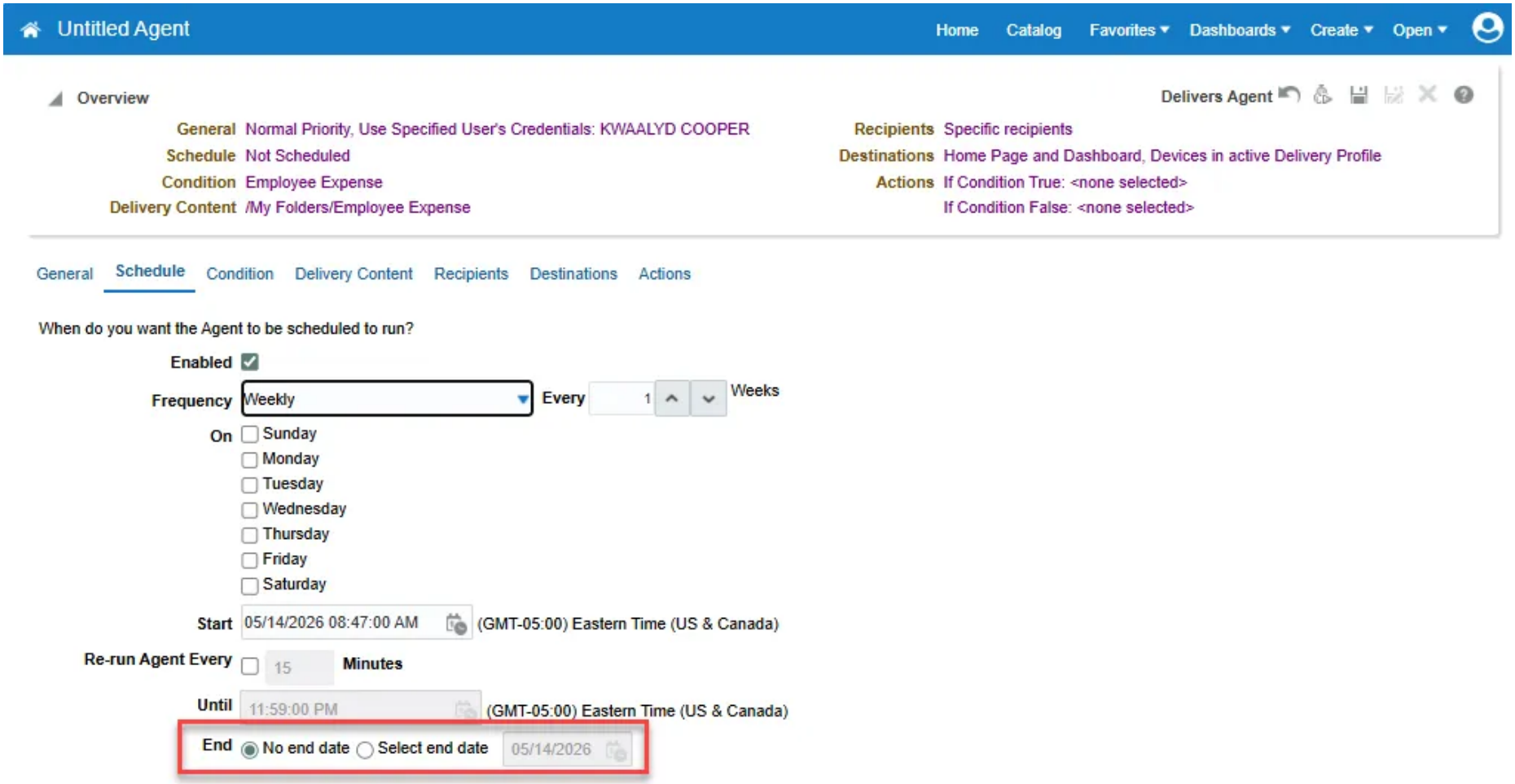
Step 6. Choose a **start date** and **time**.

Image



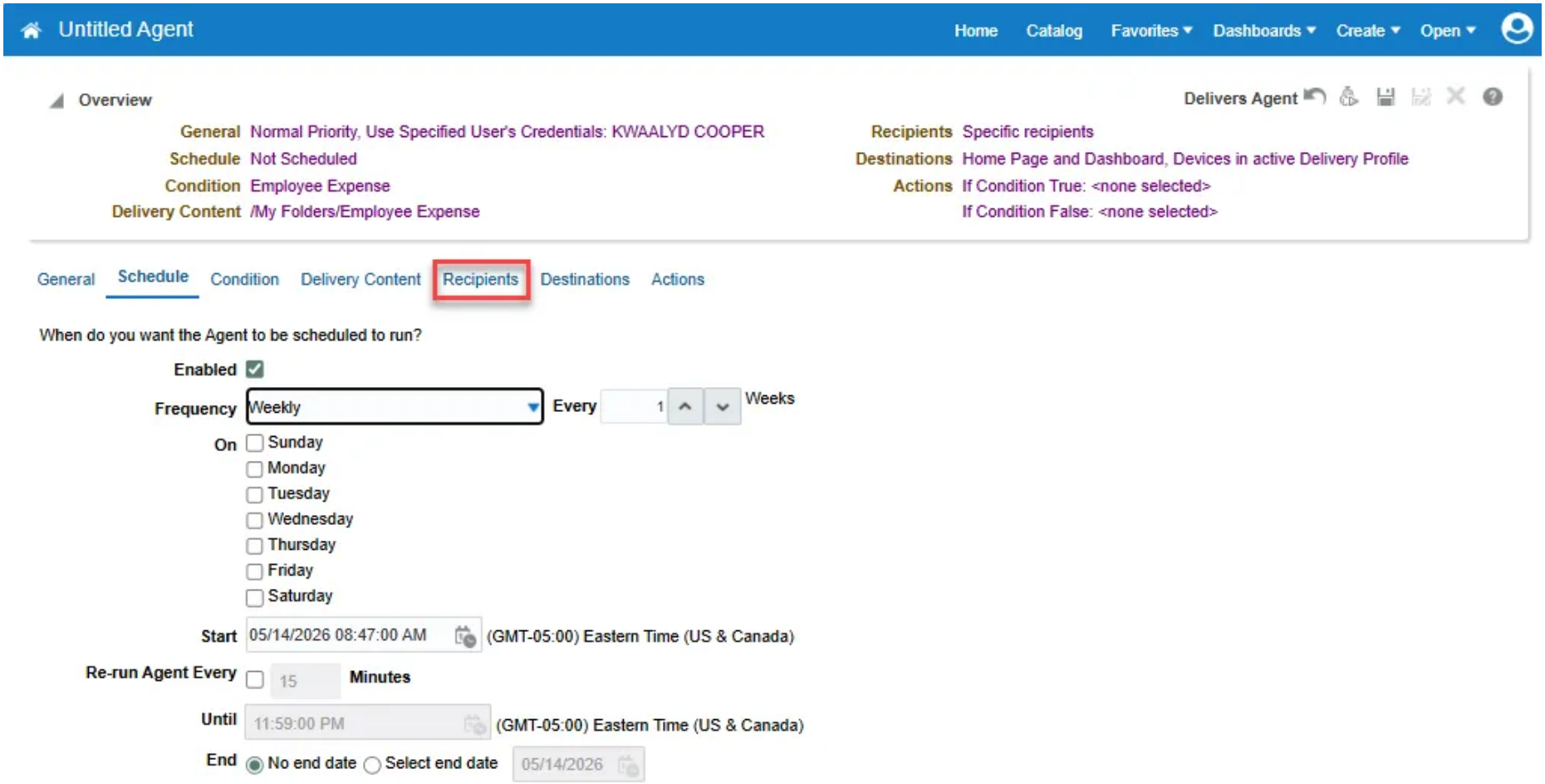
Step 7. Choose an **end date** if applicable.

Image



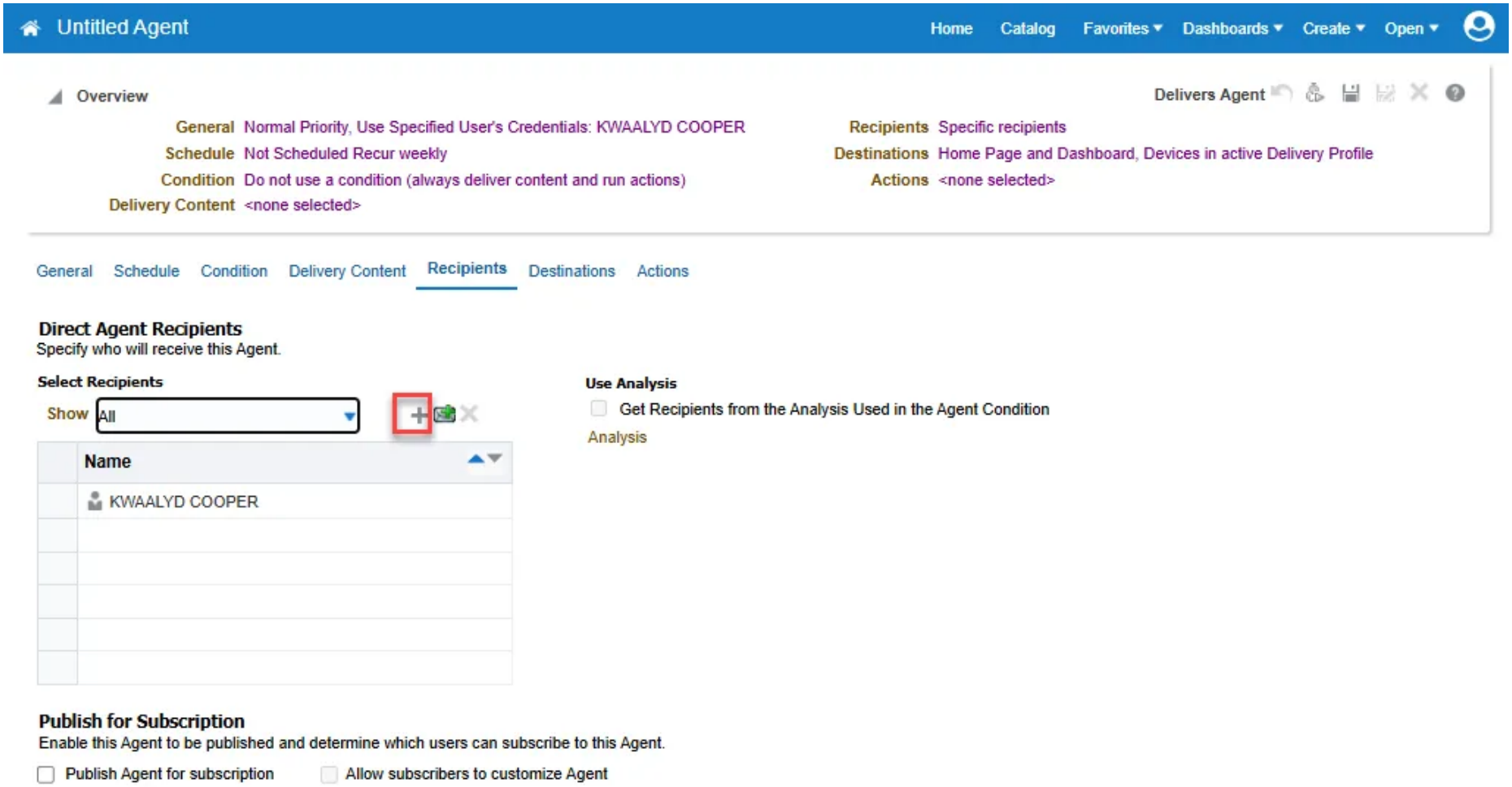
Step 8. Select the **Recipients** tab.

Image



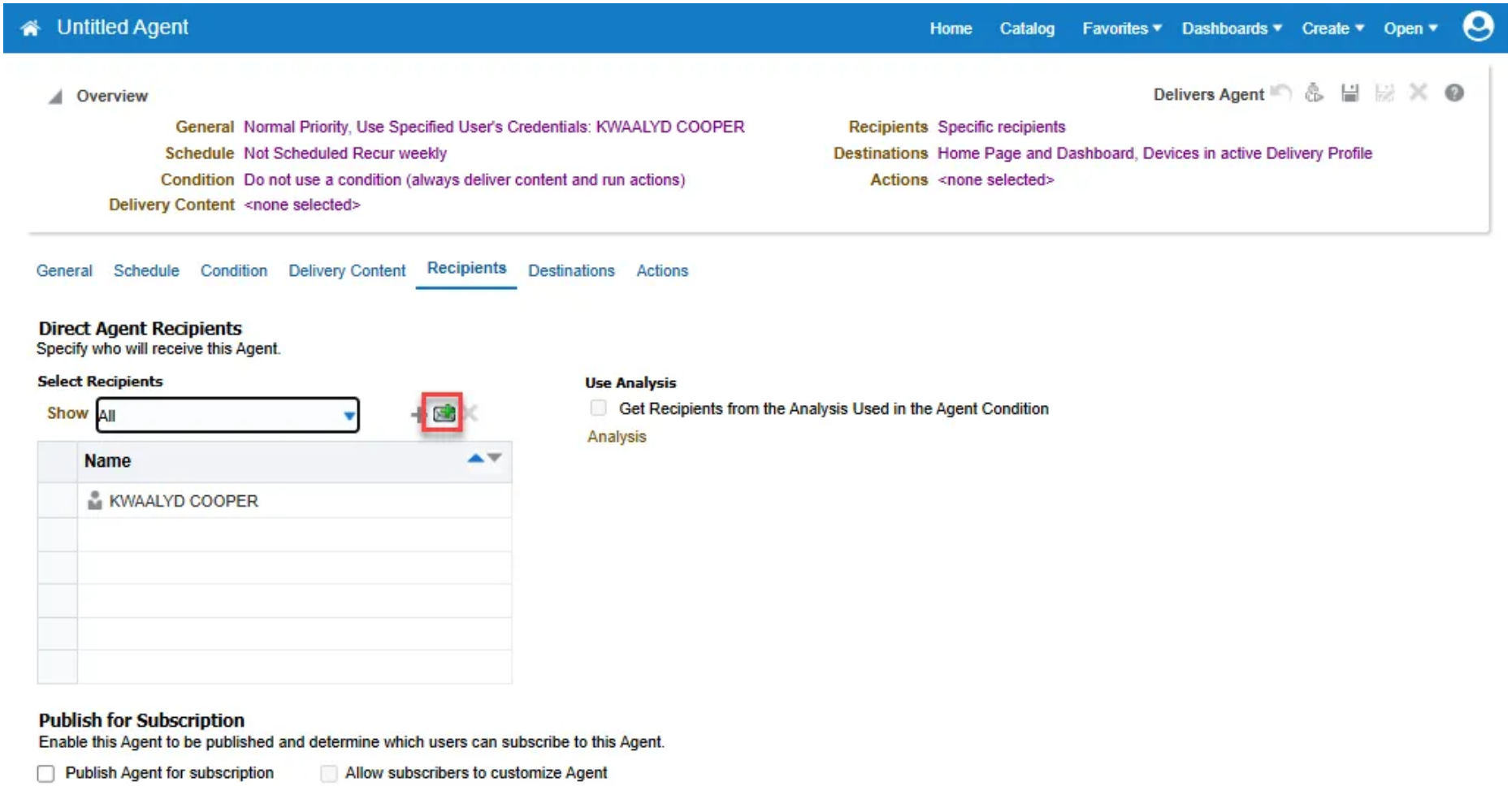
Step 9. Choose the **Plus** button to add an NCFS user as a recipient. This will deliver the analysis to their home page.

Image



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

Image



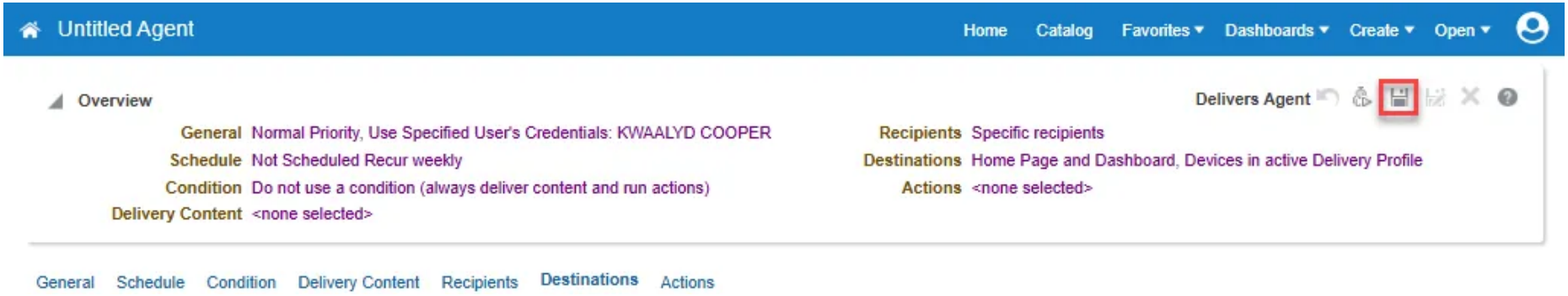
Step 11. Enter **email addresses** for recipients and choose **OK**.

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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