

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

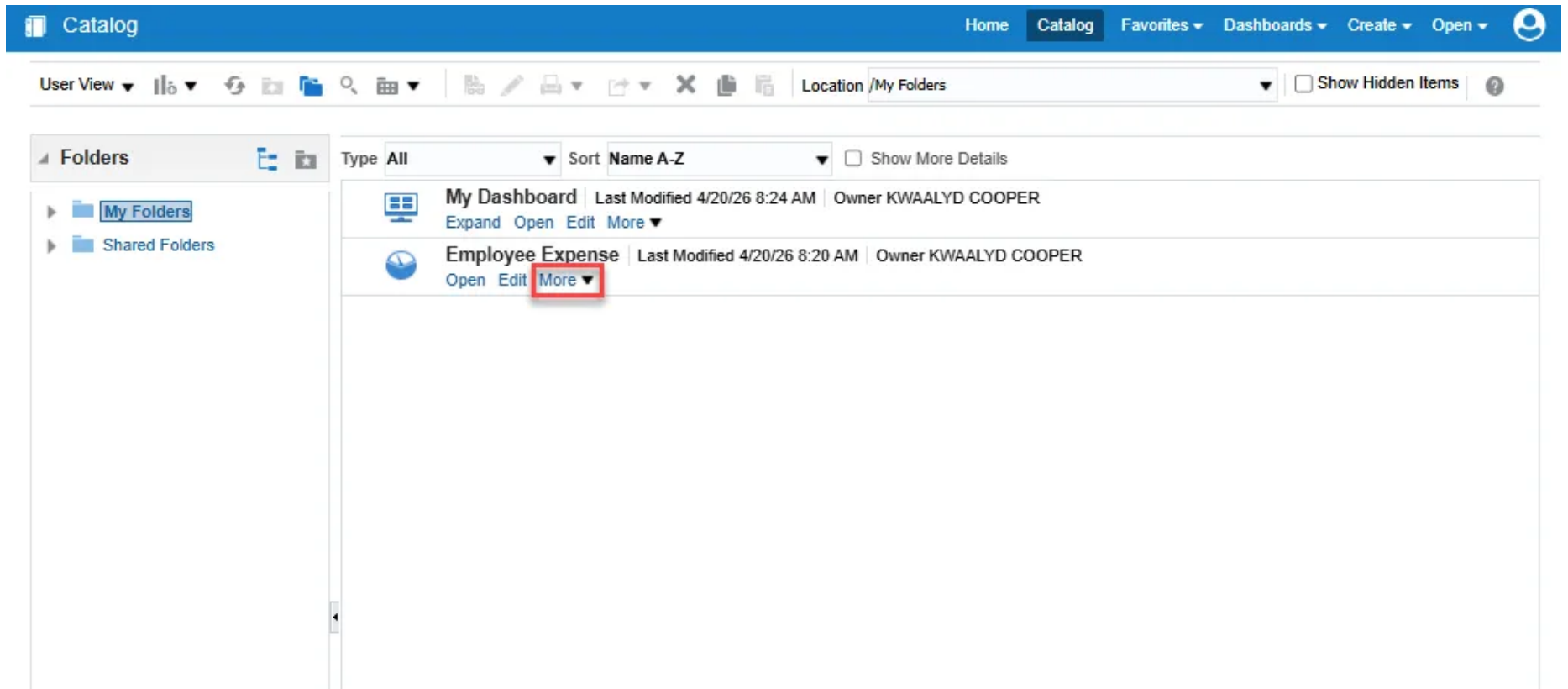
This QRG covers the process of scheduling an OTBI report.

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

Catalog Home Catalog

User View Location /My Folders

Folders

- My Folders
- Shared Folders

Type All Sort Name A-Z ☐ Show More Details

My Dashboard Last Modified 4/20/26 8:24 AM | Owner KWAALYD COOPER
[Expand](#) [Open](#) [Edit](#) [More](#)

Employee Expense Last Modified 4/20/26 8:20 AM | Owner KWAALYD COOPER
[Open](#) [Edit](#) [More](#)

- Print
- Export
- Add to Briefing Book
- Schedule**
- Email
- Delete
- Copy
- Rename
- Add to Favorites
- Create Shortcut
- Archive
- Properties
- Permissions

Tasks

My Folders

[Expand](#) [Archive](#)

[DSS](#) [Unarchive](#)

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

General

Schedule

Condition

Delivery Content

Recipients

Destinations

Actions

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

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

Enabled

Frequency

Start

Re-run Agent Every

Until

Never

05/14/2026 08:47:00 AM

15

11:59:00 PM

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

Minutes

(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

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

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

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

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

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?

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(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 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

HomeCatalogFavorites ▾Dashboards ▾Create ▾Open ▾

Overview

Delivers Agent 

General

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

Recipients

Specific recipients

Schedule

Not Scheduled Recur weekly

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Condition

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

Actions

<none selected>

Delivery Content

<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 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

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Specific recipients

Schedule

Not Scheduled Recur weekly

Destinations

Home Page and Dashboard, Devices in active Delivery Profile

Condition

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

Actions

<none selected>

Delivery Content

<none selected>

GeneralScheduleConditionDelivery ContentRecipientsDestinationsActions

Direct Agent Recipients

Specify who will receive this Agent.

Select Recipients

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Name

 KWAALYD COOPER

Use Analysis

☐ Get Recipients from the Analysis Used in the Agent Condition

Analysis

Publish for Subscription

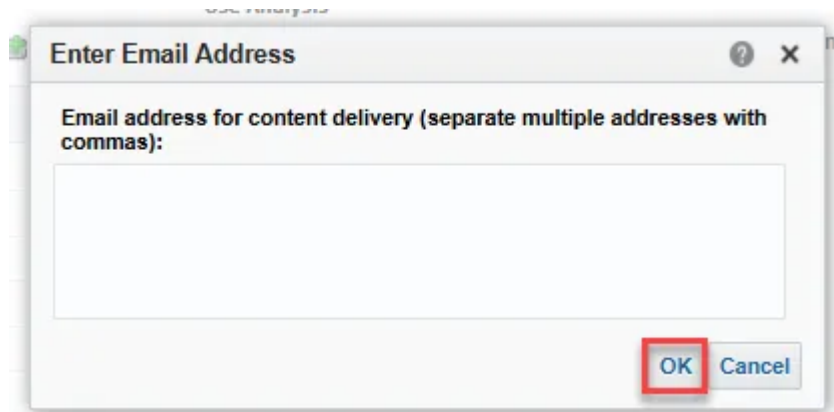
Enable this Agent to be published and determine which users can subscribe to this Agent.

☐ 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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