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UAccess ANALYTICS

Working with Agents:
Delivering Data to Your Desktop

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Record of Changes		
Date	**Version #**	**Description**
04/16/2010	1.00	Original
06/16/2012	2.00	Name changed to Working with Agents with advent of new software version
10/22/2012	2.10	Updated content to reflect reality of updated software
03/14/2013	2.20	Updated content in the General Tab and Schedule Tab sections
07/19/2013	2.21	Updated Mosaic Community to UAccess Community on pg iv; clarified recipient requirements on pg 7.
08/20/2015	3.00	Updated to include a better way to begin creating agents, information about sending agents to other employees, information about the UAIR policy, and other additions

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About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with agents. For more extensive and specific information, please refer to the Delivering Content section of the UAccess Analytics online Help documentation at https://analytics.uaccess.arizona.edu/analytics/olh/l_en/biee0133.htm.

This booklet is generic by necessity, but will provide you with the information you need to build and maintain your own cadre of basic agents.

For information on workshops in which you can learn how to build analyses and dashboards, as well as other brown bag demonstrations, please go to the Workshops and Training Team website at http://workshops.arizona.edu.

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to **https://request.uaccess.arizona.edu**.

UAccess Community

The UAccess Community is an online networking resource available to everyone on campus who use UAccess Systems.

If you have an official UA email address, you can request membership in the UAccess Community. Just go to http://community.uaccess.arizona.edu and click the Sign Up link in the upper right corner of the screen.

Once your membership is confirmed – usually within a few hours – you'll have access to valuable information about all of the various aspects of UAccess Systems. You'll want to join one or more of the groups within the Community, because that's where the value comes in.

In each of the group areas, there are short videos showing you how to perform different tasks, discussion boards with questions from campus and answers from the experts, and information on upcoming workshops from the Workshops and Training Team.

Please take advantage of the opportunity and become a member of the UAccess Community.

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Working with Agents

What is an Agent?

An agent is a combination of a scheduling tool and a delivery tool.

You can create agents that will deliver an analysis to you or others on a regular schedule or when a report meets certain conditions. Agents can even deliver information to different people under different circumstances.

For example, an agent could deliver an analysis to you half an hour before your regularly-scheduled monthly meeting on the first Monday of every month.

Alternatively, an agent could deliver an analysis to you only if the monthly balance on your departmental PCard reaches a specific amount, say 75% of the card limit.

Agents deliver this information to you via Alerts.

What are Alerts?

An alert is a notification generated by an agent.

You can see the alerts that have been delivered to you throughout Analytics

- In the **Alerts** section of the Home page.
- In the Alerts dialog displayed from the **Alerts**! button in the global header.
- In specified delivery devices, such as email.
- On the first page of **My Dashboard**.
- On a dashboard page, if the content designer adds an Alerts section to the page.

Premise

For the purposes of this booklet, we will assume that you have created the analysis you wish to use as the delivered content for the agent. You will also have the agent deliver the analysis to yourself and no one else.

Creating an Agent

Accessing the Agent Editor

The agent editor is where you begin the process of creating your agent. There are two ways to access the Agent Editor; the Better way and the Other way.

Better Procedure

The easiest path for creating an agent is to start with the analysis you want delivered on your screen in Edit mode. You should be on the **Results** tab of that analysis.
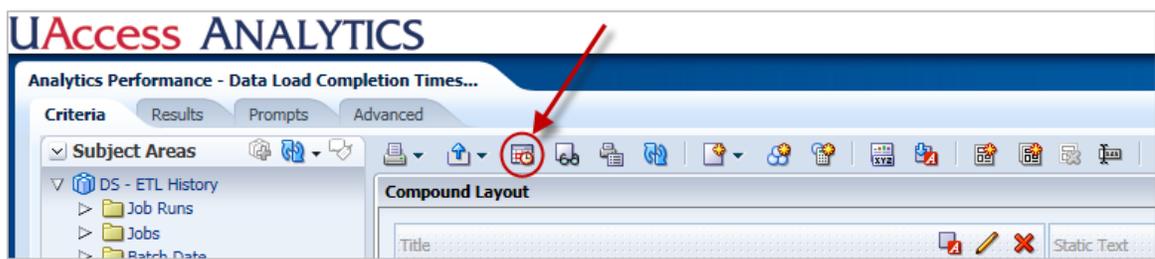
1. Click the **Schedule** button on the button bar above the Compound Layout pane.

   The screen changes to show you a new, untitled agent. There are seven tabs to work with as you create an agent, and you are on the **General** tab.
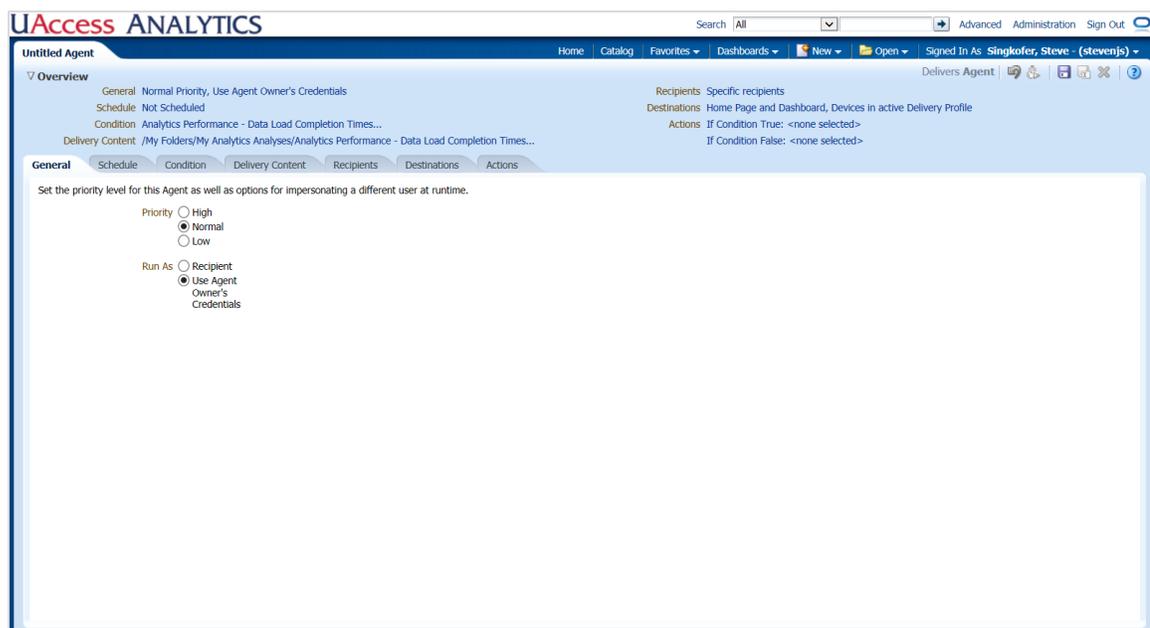

   Because you started the agent from within the analysis, some of the tabs have been populated with information from that analysis.

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Other Procedure

The other way to begin creating an agent is to start like you would with any other Analytics content or tools.

1. Click the **New** link on the Global Header.

2. Click the **Agent** link on the menu.

   The screen changes to show you a new, untitled agent. All of the seven tabs are completely empty.
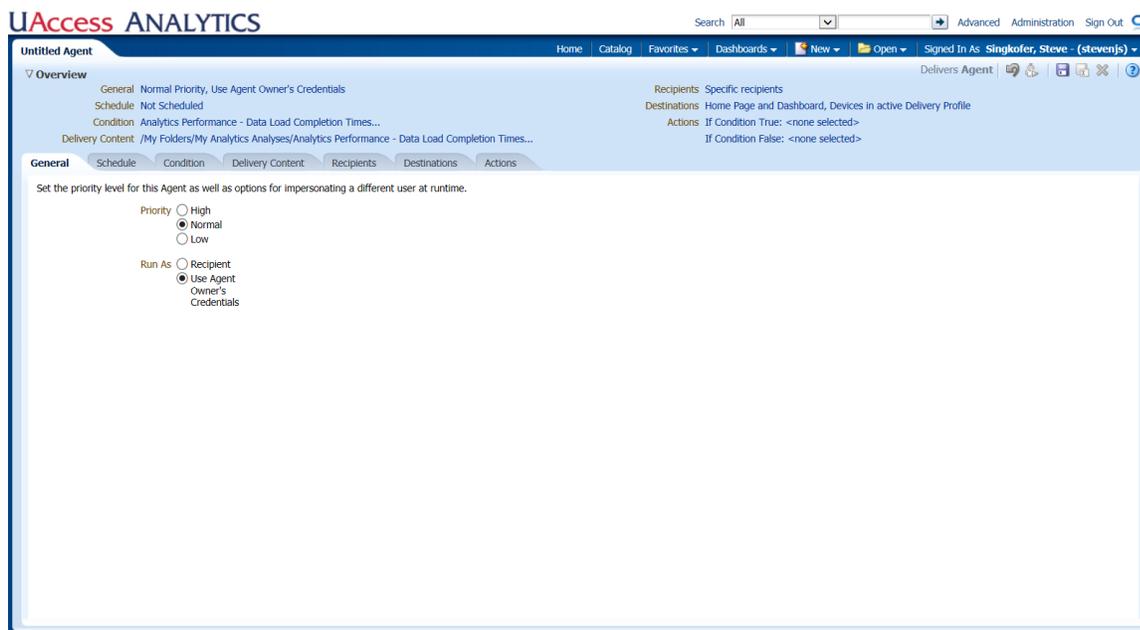
From this point forward we'll assume the agent was started using the Better procedure, by clicking the Schedule button on the Results tab of the analysis you want delivered.

General Tab

Use the General tab to set the priority level for the agent, as well as indicating whether this agent is delivering data to one person, or to several people.

Procedure

1. Set the **Priority** level for this agent. You can typically leave this at Normal, unless you want the email flagged as a high priority item.

2. Set the **Run As** radio button to

   a. ***Use Agent Owner's Credentials*** if you are the only person receiving the content.

   b. ***Recipient*** if several people are going to receive the delivered content.

Schedule Tab

Use the Schedule tab to set the delivery schedule for this agent.

Procedure

1. Check the **Enabled** box to activate the agent.

2. Set the **Frequency** at which this agent will run.

   You may want to take a moment to think about how the delivered report is going to run, and what the best schedule would be. Monthly Financial reports, for example, might best be run on the 7th or 8th day of the following month. Other reports might be delivered daily, weekly, or on some other schedule.

   a. For some conditional agents – those where the report might be triggered at any time – you could set the frequency to ***Daily***. Set the time at which you wish the agent to run.

   b. For other agents, set this field to the desired frequency.

      ▪ For **Weekly**, select the number of weeks and which days of the week you want the agent to run.

      ▪ For **Monthly**, select the day or date and the specific months during which you wish the agent to run.

3. Set the **Start** date and time for this agent.

   The start time is more important than the date. Click the **Select Date and Time** button to set the time for delivery.

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4. You can elect to **Re-run Agent Every *X*** number of minutes, **until** a specified time. This option is rarely used.

5. You can select an **End** date if you wish, at which point the agent will no longer run. This option is rarely used.

Condition Tab

Use the Condition tab to specify the condition under which the agent will generate an alert.

*Note: If you started creating this agent by using the Schedule button in the analysis, this tab is already populated for you. You shouldn't need to make any edits. Move on to the **Delivery Content** tab.*

The default condition is that the selected analysis has one or more rows of data available when the agent runs. The only thing you can change about the condition is the number of rows of data required to trigger delivery. The default number of rows is set to "greater than zero."

If you wish to populate this Condition tab yourself, you can create your own condition.

Procedure

1. Click the **Use a condition** radio button, then click the **Create** button.

2. Click the **Browse** button on the **Create Condition** pop-up window.

3. Browse to and select your already-created analysis.

   If the analysis has prompted filters, you will be required to review and/or change the parameters for those prompted filters at this point.

4. For the **True If Row Count** fields, select the desired **operator** and the appropriate **number of rows**. The default is "is greater than 0.'

5. Use the **Test** button to be sure the condition is working as desired. The test will evaluate the condition to either **True** (an alert would be triggered) or **False** (an alert will not be triggered).

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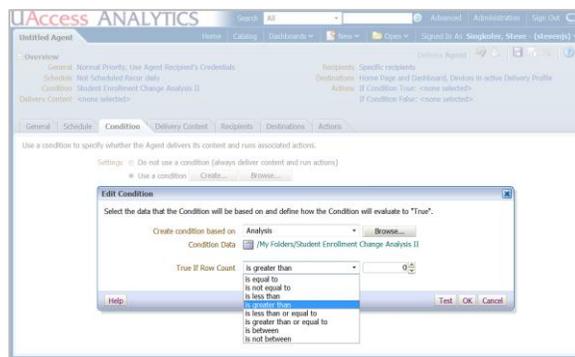
Delivery Content Tab

Use the Delivery Content tab to specify the content which will be delivered when the agent is triggered.
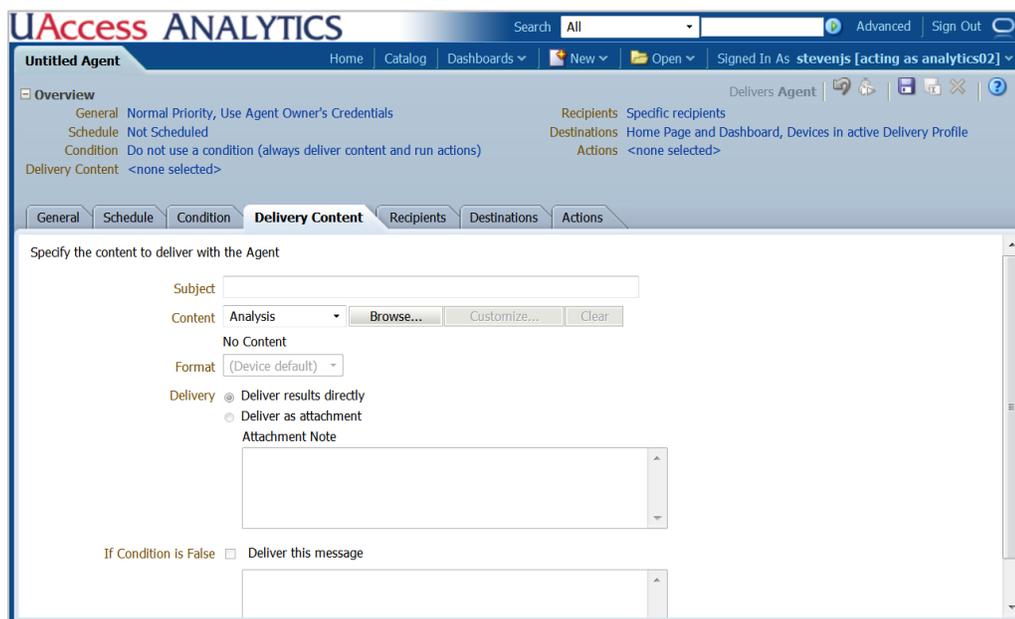
Note: If you started creating this agent by using the Schedule button in the analysis, some information on this tab is already populated for you.

Procedure

1. Enter the **Subject** for the agent. The subject will be the name of the alert and the subject line of any email generated for the alert.

2. Select the **Content** for the agent. A typical entry for this field is **Analysis**. *See Note above. The content will be set to **Condition Analysis**.*

3. Click the **Browse** button and browse to and select the desired analysis. *See Note above. The analysis has been selected for you.*

4. Set the desired **Format**.

   If you leave this field set to *(Device default)*, the agent will deliver the content directly in an email in HTML format, which is the same as that seen within Analytics. PDF is a popular alternative.

5. If you selected a **Format** other than (Device default), the **Deliver as attachment** option will be selected for you. You can add an **Attachment Note** if you wish.

6. If you are creating a conditional agent *(see Note above),* you have the option of creating a message to be delivered **If Condition is False.**

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Recipients Tab

Use the Recipients tab to specify to whom the content will be delivered when the agent is triggered. By default, your name and NetID are already identified in the **Direct Agent Recipients** section of the Recipients tab. You can move on to the **Destinations** tab.

If, however, you want this agent to deliver the analysis to someone other than or in addition to yourself, several conditions must be met.

1. The analysis being delivered by this agent must have been saved in a Shared folder such as a college or department folder.
2. The others receiving information via this agent must have access to the folder where the report was saved.
3. The others receiving information via this agent must have been provisioned to receive the type of data being delivered. You can verify the potential recipient's role on the **Dashboards > Security > Security > Person Roles** dashboard.

Procedure to Add Direct Agent Recipients

1. Click the **Add Recipient** (green plus sign (+)) button to begin adding new recipients. When recipients are added through this function, Analytics verifies that the recipients have the correct roles assigned authorizing them to receive and view the type of data being delivered by the agent.

2. Enter the **NetID** of the desired recipient in the **Name** field on the Select User screen.

3. Set the **List** box to **Users**.

4. Click **Search**.

5. Move the listed user to the **Selected Members** list by using the arrow buttons in the center of the screen.

*Note: Avoid using the **Add Email Recipients** button, when possible. When recipients are added through this function, the agent owner takes responsibility for making sure recipients have the correct roles authorizing receipt and viewing of the type of data being delivered by the agent. If Student data, for example, were to be delivered to someone without the proper authorization to receive or view that type of data, FERPA rules, regulations, and penalties would come into play.*

Use Analysis

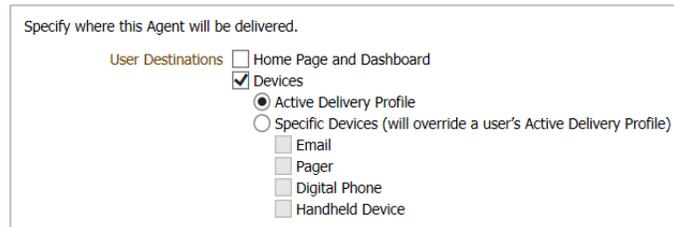This function will not be covered in this booklet.

Destinations Tab

Use the Destinations tab to specify where you wish the content to be delivered when the agent is triggered. The default destinations will send an alert to your Analytics Home Page, to your own personal dashboard, and to your email inbox.

Procedure

1. Select or deselect **User Destination** options.

   A typical configuration would be to de-select Home Page and Dashboard, meaning that the analysis will be delivered just to your email inbox.

No other settings on this page are necessary if you wish the agent to deliver the analysis to your email.

Actions Tab

The Actions tab allows users to chain agents. This tab will not be covered further in this booklet.

Saving an Agent

Once you have created the agent, save it, then test it. Regardless of who has been identified as the recipient – just you or forty-seven other people – you must save the agent itself in your own personal My Folders folder.

Procedure

1. Click the **Save** button in the upper-right corner of the screen.

2. Name the agent and click **OK**.

3. Test the agent with the **Try Agent Now** button.

Note: Be sure you save your agent in your own personal folder. You won't be able to edit the agent if you save it into a shared folder.

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Disabling an Agent

Once you've created an agent, there may come a point at which you wish to temporarily or permanently turn off the agent without deleting it. Begin on the Home page in Analytics.

Procedure

1. Click the **My Agents** link in the **Browse/Manage** section of the Home page
2. Locate the agent you wish to turn off.
3. Click the **More** link below the agent's name.
4. Select the **Disable Agent** menu option
5. **Save** the modified agent

Editing an Agent

Once you've created an agent, there may come a point at which you wish to change or edit that agent. Begin on the Home page in Analytics.

Procedure

6. Click the **My Agents** link in the **Browse/Manage** section of the Home page
7. Locate the agent you wish to edit.
8. Click the **Edit** link below the agent's name.
9. Make the necessary changes
10. **Save** the modified agent

Deleting an Agent

Once you've created an Agent, there may come a point at which that agent is no longer needed or wanted. You can delete an agent, if you wish. Begin on the Home page in Analytics.

Procedure

1. Click the **My Agents** link in the **Browse/Manage** section of the Home page

2. Locate the agent you wish to delete

3. Click the **More** option below the agent's name

4. Select **Delete** from the menu

5. Click **OK** to confirm the deletion

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Accessing Analytics Alerts

Analytics Alerts appear by default on the Home page, on the Global Header, on your personal dashboard, and you may also receive an email which contains the desired analysis.

To view the alert from the Home page, click the View link for the displayed alert.

When Analytics Delivers is enabled, you can add an Alerts section to any dashboard page. When alerts are present, the **Alerts!** link appears at the top of each Analytics page.

Procedure

1. Click the **View** link for the displayed alert

   a. Clear the link using the **Clear** button on the pop-up window

2. Other options are available through the **More** link for the displayed alert