

How to schedule an OTBI report in Oracle Fusion: Creating a Scheduled Birthday Email Agent for Managers

This guide shows you how to schedule an OTBI report in Oracle Fusion to automatically send managers a personalized list of their team members' upcoming birthdays. By building an agent around the Birthday E-mail Analysis, you can automate monthly delivery so each manager receives only information relevant to their own team.

Prerequisites

- Access to Oracle Transactional Business Intelligence (OTBI) with the **Birthday E-mail Analysis** available under the **Others** section.
- Permissions to create and schedule agents in the Catalog.

Reviewing the Birthday E-mail Analysis

1. Open the Birthday E-mail Analysis

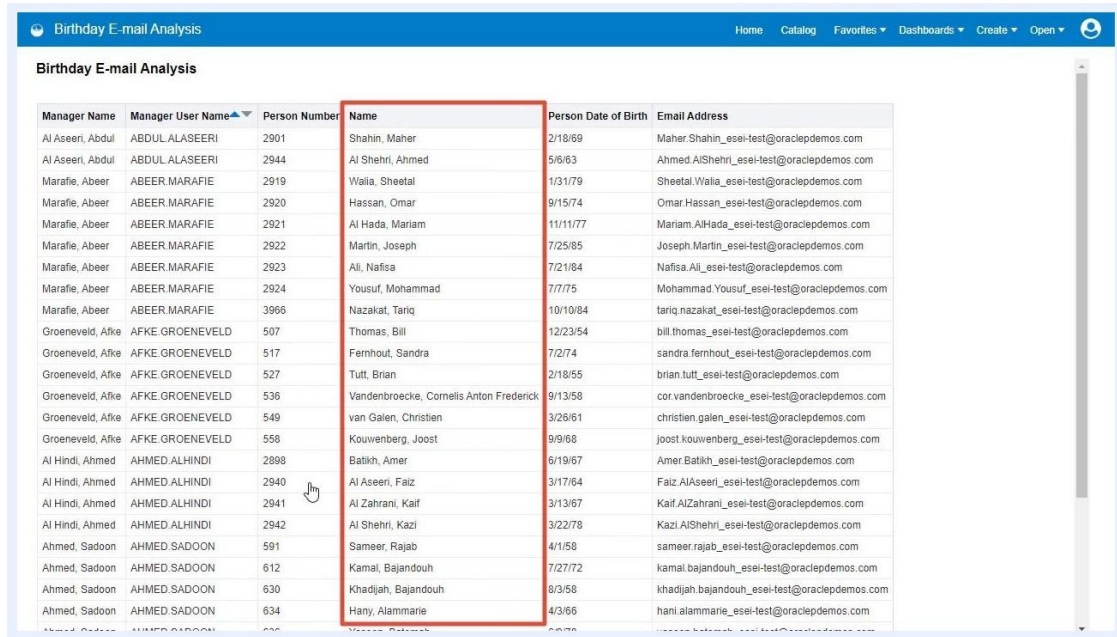
From the Oracle Transactional Business Intelligence home screen, locate **Birthday E-mail Analysis** under the **Others** section. Click **Open** next to it to launch the analysis.

Manager Name	Manager User Name	Person Number	Name	Person Date of Birth	Email Address
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Oracle BI home screen with 'Birthday E-mail Analysis' listed under Others, showing options to Open, Edit, or access More actions

2. Review the analysis data

The analysis displays a table with the following columns: **Manager Name**, **Manager User Name**, **Person Number**, **Name**, **Person Date of Birth**, and **Email Address**. Confirm that the table lists all managers, their employees, and the employees' upcoming birthdays.



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Birthday E-mail Analysis table showing columns for Manager Name, Manager User Name, Person Number, Name, Person Date of Birth, and Email Address

Note that "upcoming" refers to employees who have birthdays in the following month. Verify that the **Person Date of Birth** column is present and contains relevant dates.

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Birthday E-mail Analysis table with the 'Person Date of Birth' column highlighted, showing various birth dates

Confirm that each manager should only receive the list of their direct reports, not all employees. The analysis groups employees under their respective managers.

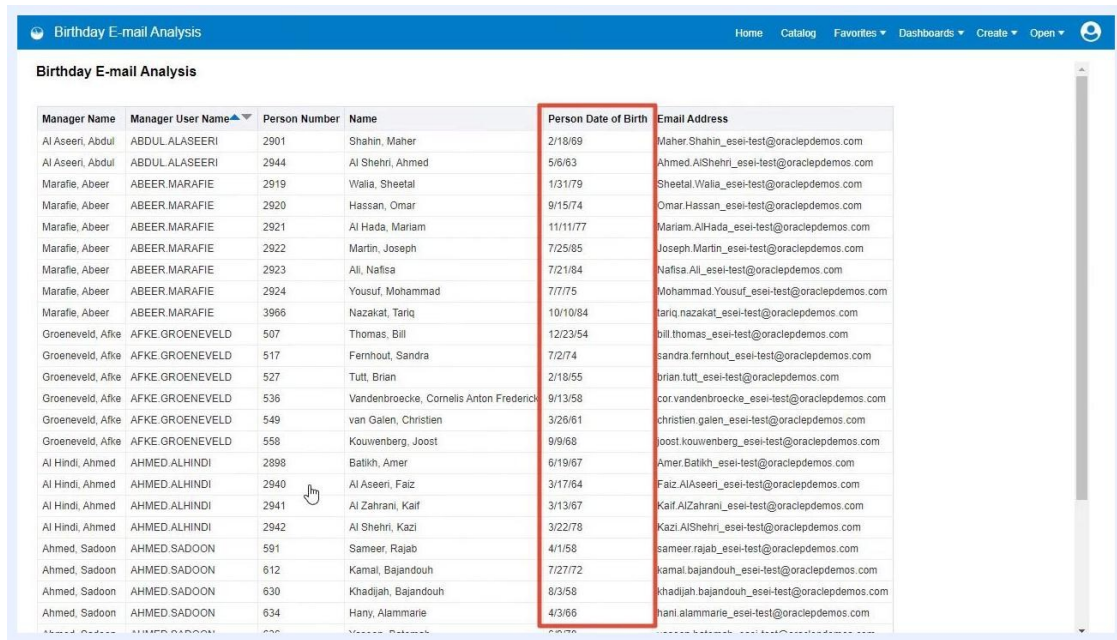
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Birthday E-mail Analysis table with rows grouped by Manager Name, showing only the relevant employees for each manager

Creating and scheduling the agent

3. Return to the Catalog to create a new agent

Click the **Catalog** button in the top navigation bar, then navigate to the folder where you want to create the agent (for example, **My Folders**).

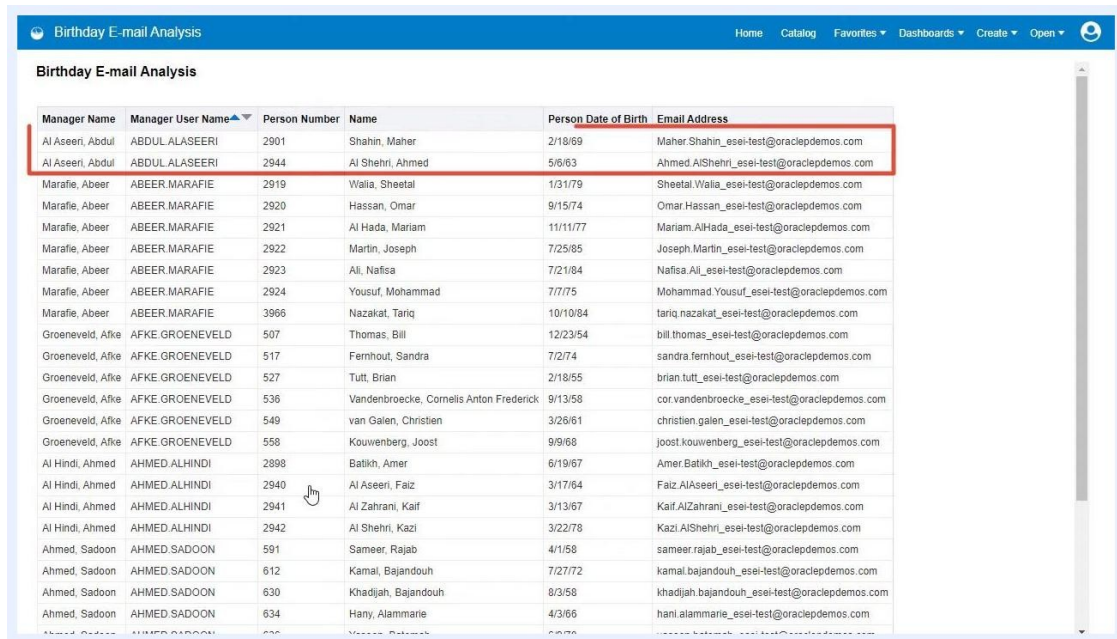


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Oracle BI Catalog view showing folders and the 'Birthday E-mail Analysis' file

4. Create and schedule the agent

Start creating a new agent, then open the **Schedule** tab. Set the frequency to **Monthly**, select **Day 1**, and ensure all months are checked. Set the start date and time as needed, and make sure the agent is **Enabled**.



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Agent scheduling screen with frequency set to Monthly, Day 1, and all months selected

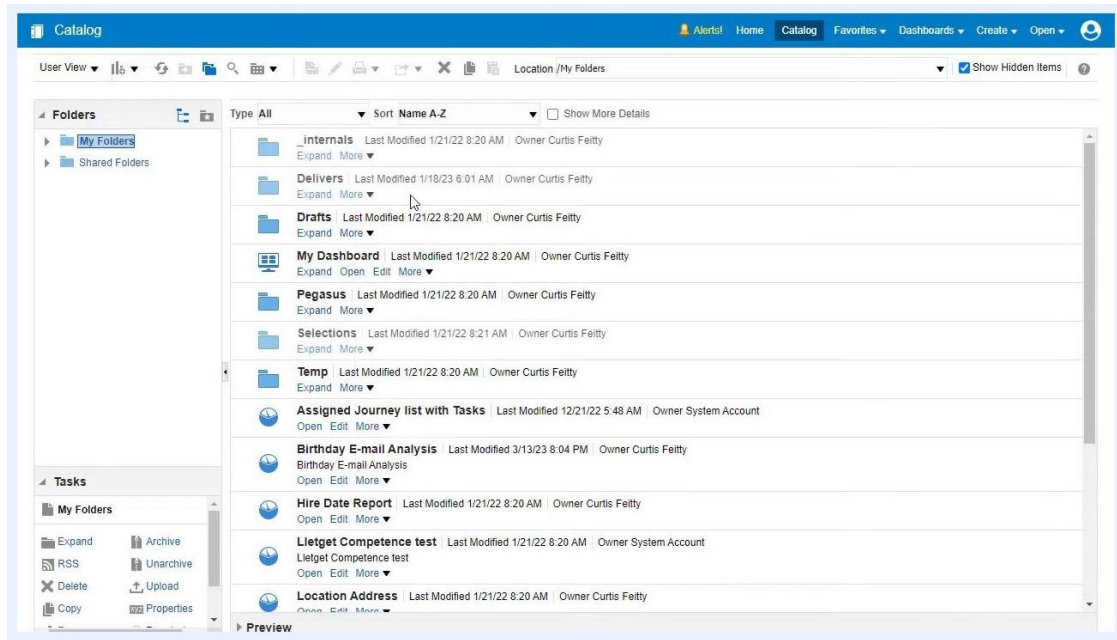
5. Set the condition for the agent

Go to the **Condition** tab and use the default condition, which checks whether there are birthdays for the current month. Test the condition to confirm it works as expected.

Configuring delivery content and recipients

6. Configure delivery content

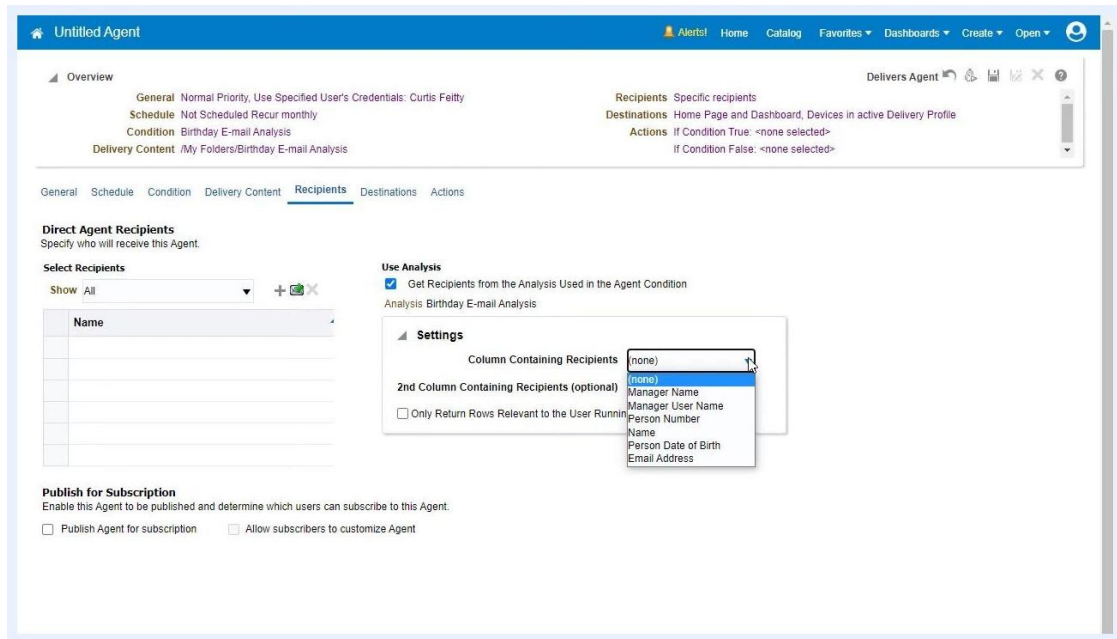
Go to the **Delivery Content** tab and set the subject to "Manager Team Birthday List". For content, select the path to your **Birthday E-mail Analysis**, and leave the format as **Device default**. Choose whether to deliver results directly or as an attachment.



Delivery Content tab with subject set to 'Manager Team Birthday List', content path set, and format as device default

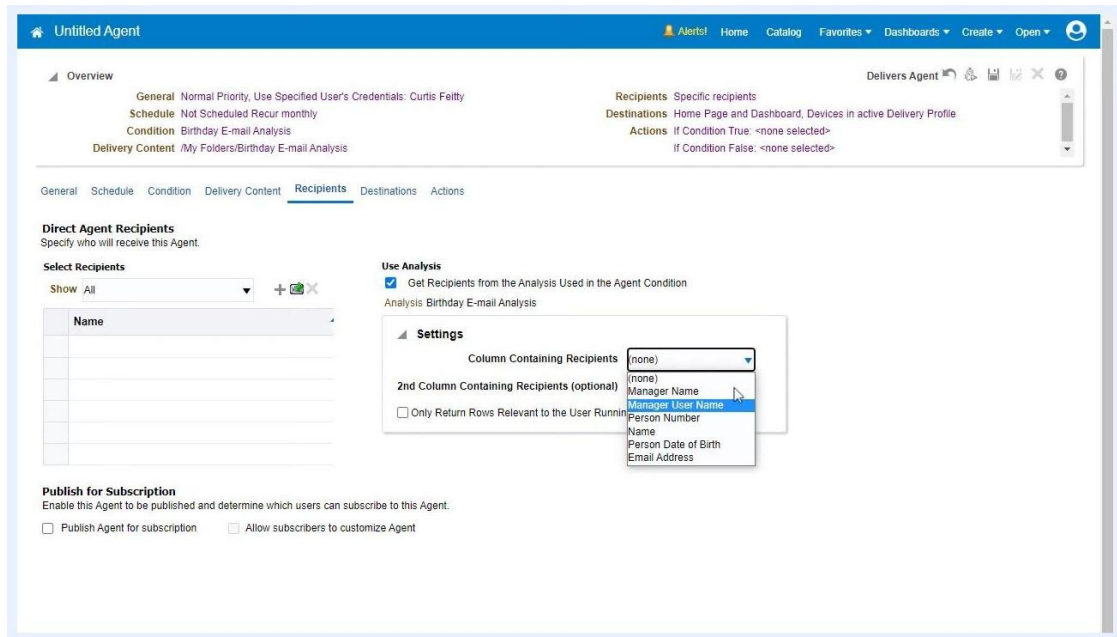
7. Configure recipients to include only managers

Go to the **Recipients** tab and remove any default recipients. Check the box for **Get Recipients from the Analysis Used in the Agent Condition**, then select **Birthday E-mail Analysis** as the source.



Recipients tab showing option to get recipients from analysis and a list of available columns for recipient selection

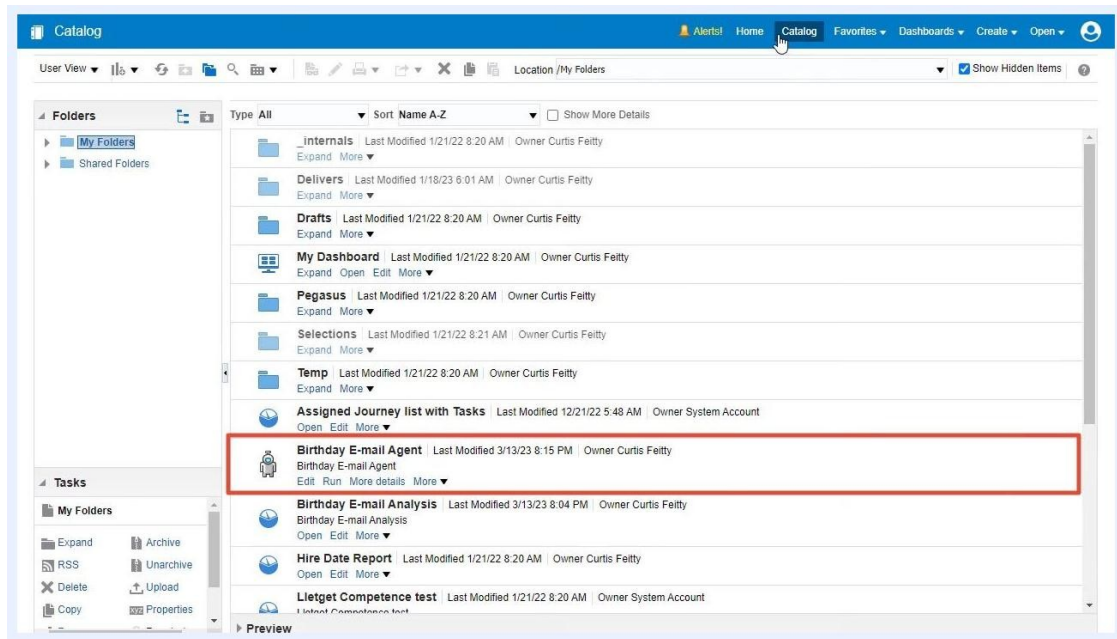
In the recipient column settings, choose **Manager User Name** from the dropdown menu for **Column Containing Recipients**. Do not select a second column, since only the manager's username is needed.



Recipients tab with dropdown menu open, highlighting 'Manager User Name' as the selected column for recipients

8. (Optional) Restrict rows to the user running the agent

In the **Recipients** tab, under **Settings**, check **Only Return Rows Relevant to the User Running the Agent** if you want each manager to see only their own team's birthdays. This filters the results so each recipient only receives information relevant to them.

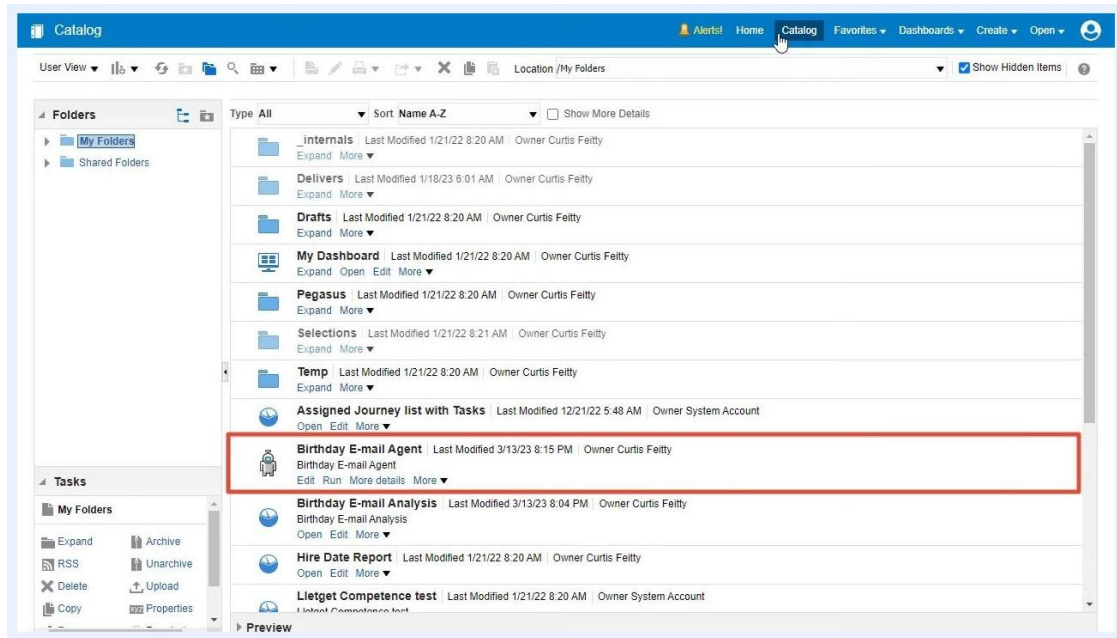


Recipients tab with 'Only Return Rows Relevant to the User Running the Agent' option highlighted, 'Manager User Name' selected as the recipient column, and the agent overview visible at the top

Saving and verifying the agent

9. Save the agent

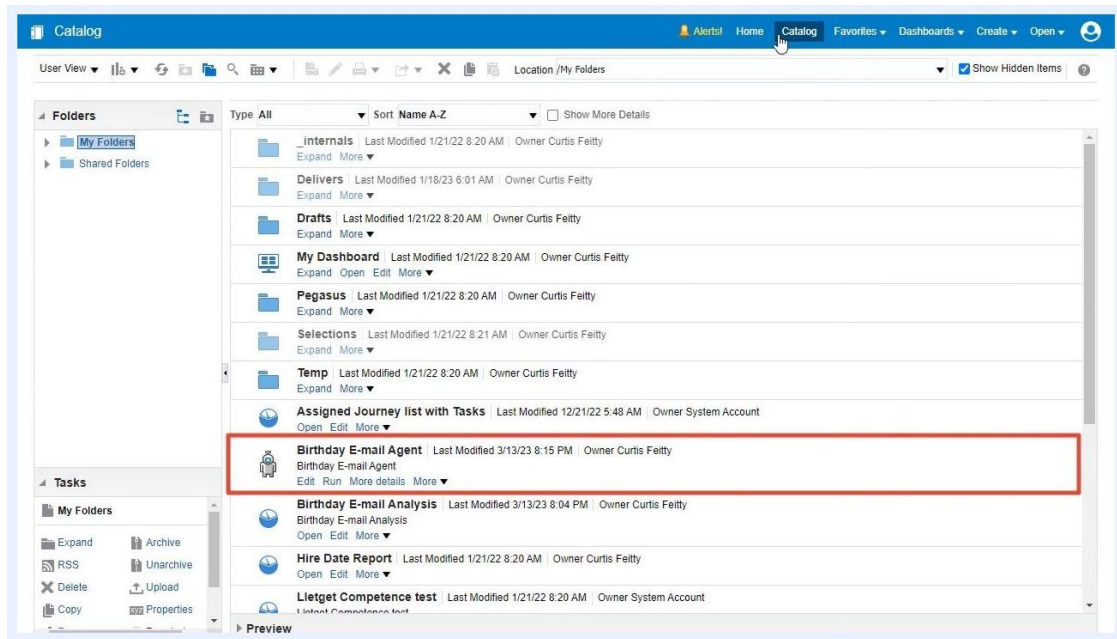
Click the **Save** icon (floppy disk) in the agent setup window. Confirm that your agent is now listed in the Catalog under your chosen folder (for example, **My Folders**) as **Birthday E-mail Agent**. The agent is now configured to run automatically on the first day of every month.



Oracle BI Catalog view showing 'Birthday E-mail Agent' listed, with last modified date and owner information, confirming the agent is saved and ready

10. Verify agent setup

In the Catalog, locate the **Birthday E-mail Agent** entry. Confirm the last modified date and owner details to ensure your changes have been saved. The agent is now ready to deliver the list of upcoming birthdays to each manager as scheduled.



Catalog view with 'Birthday E-mail Agent' highlighted, showing confirmation of agent creation and readiness for scheduled delivery

Summary

By completing these steps, you have successfully learned how to schedule an OTBI report in Oracle Fusion that automatically sends each manager a personalized list of their team members with upcoming birthdays on the first day of every month. This approach ensures privacy, relevance, and automation for your organization's birthday notifications.