

1. Identify an issue within your college, department or office that can be solved by the delivery of precise information in a timely manner.

**Ex.** Enrollment in certain classes should be around 30 students but in the past several semesters it has been below that. How can we identify what classes are getting close to the 30 student enrollment?

2. Create your report:
  - a. Start from Scratch
  - b. Choose an existing report
  - c. Choose to analyze an already existing report from an Analytics dashboard:

**Ex.** Create a report that shows class enrollment on today's date.

3. Set Your Agent:
  - a. What will recipients receive?  
**A report you created that lists the people currently enrolled in the class.**
  - b. Who is the information being sent to?  
**Class Lecturer, that the agent will identify from the report**
  - c. In what frequency should they receive the info?  
**Only when enrollment drops below 35 people.**
  - d. How should it be delivered?  
**Via PDF email attachment.**

4. Practice Run! Run the agent with only yourself as the recipient. Make sure it looks exactly as you want it.

**Ex.** Report shows up in the body of email. Go back and make sure it is sent as PDF.

5. Repeat step 4 about 10 more times!
6. Inform all parties involved that you are rolling out a new information delivery system.

**Ex.** A coming soon email can build some excitement for the new report.

7. Run the agent! Continue to make changes, continue create new agents and continue to better your processes.