

OAC-05 Save and Share a Report

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide how to Save and Share a Report in Oracle Analytics Cloud (**OAC**) Classic.

Introduction and Overview

This QRG covers the process of saving and sharing a report in OAC Classic. Users can save reports in either My Folders or Shared Folders. My Folders is a personal workspace unique to each user for private report storage. Shared Folders allow users to share reports with designated agencies, such as OSBM, OSC, and the Fiscal Research Division.

Save and Share a Report

Follow the below steps to save and share a report in OAC classic. There are 8 steps to complete this process.

Step 1. To save a report, navigate to the desired report and perform the required analysis.

Image

NCFS ACFR 11G - Balance Sheet Report (RPTOAC001)
Home
Catalog
Favorites
Dashboards
Create
Open

Criteria
Results
Prompts
Advanced

Return to 'NCFS ACFR 11G - Balance Sheet Report (RPTOAC001)'

Subject Ar...

NCFS - Balances
Account
Account 12G
Account 17G
Account Current
Account FIDU
Account GOV
Account GW5OREV
Account PROP
Agency
Agency Management
Agency Program

Catalog
List All
My Folders
Shared Folders
Views
Title

Compound Layout

Title
NCFS ACFR 11G - Balance Sheet Report
RPTOAC001
Time run: 11/10/2025 2:00:55 PM

Filters
Fiscal Period Name is equal to 13_Jun-24
and Ledger Name is equal to NC MODIFIED ACCRUAL US
and
ifnull(CASE WHEN Parent3 = '90990G' THEN ifnull(CASE WHEN Child/Parent 3 IN ('219999C','2215999C','2152199C','2116999C','2162999C','2123999C','2124999C','2125099C','2223999C','2126999C','2127999C','2181199C','2171199C','2171999C','2131599C',... Is not null
and ifnull(CASE WHEN Parent3 = '90990G' THEN ifnull(CASE WHEN Child/Parent 3 IN ('219999C','2215999C','2152199C','2116999C','2162999C','2123999C','2124999C','2125099C','2223999C','2126999C','2127999C','2181199C','2171199C','2171999C','2131599C',... Is not equal to / Is not in 0

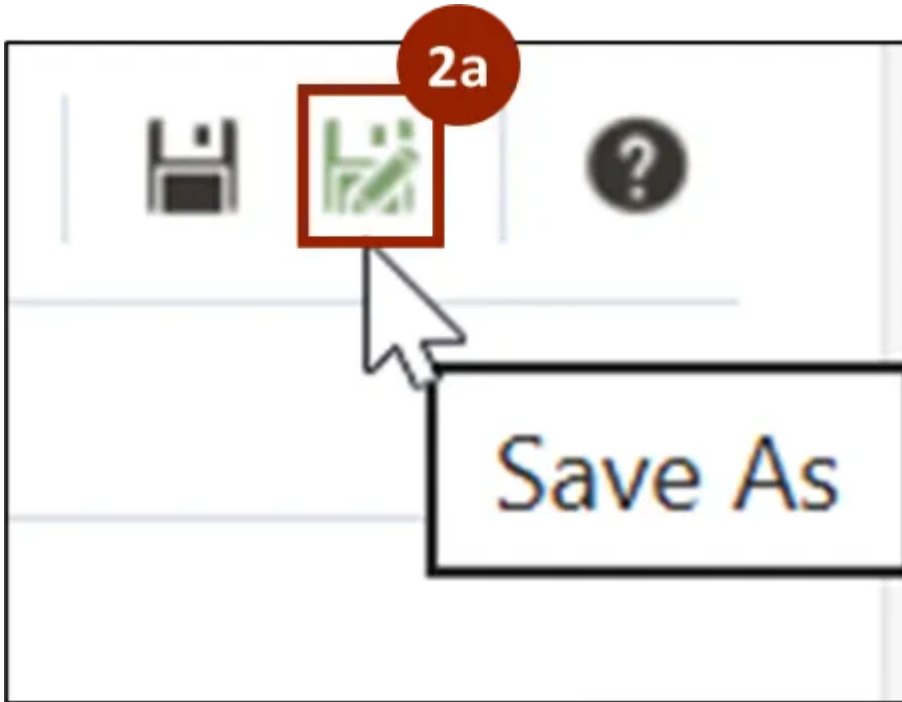
Pivot Table

Account GOV Hierarchy	11990G - GENERAL FUND (ALL)	12990G - SPECIAL REVENUE FUNDS	14990G - CAPITAL PROJECTS FUNDS	15990G - PERMANENT FUNDS	90990G - NOT INCLUDED FOR BUDGET AND/OR GAAP
ASSETS AND OTHER DEBITS					
CASH, CASH EQUIV, AND POOLED CASH					
1199999C - CASH, CASH EQUIV, AND POOLED CASH	23,959,505,397.52	5,032,811,893.86	1,834,296,430.21	55,680,361.53	69,505,283.78
1112999B - POOLED CASH	23,920,214,842.19	4,993,943,669.98	1,834,293,805.21	55,680,361.53	69,499,683.78
1119999B - CASH AND CASH EQUIVALENTS	39,290,555.33	38,868,223.88	2,625.00		5,600.00
INVESTMENTS					

Step 2. Once the changes are complete, you can find the **Save As** icons in the top right corner to save your report.

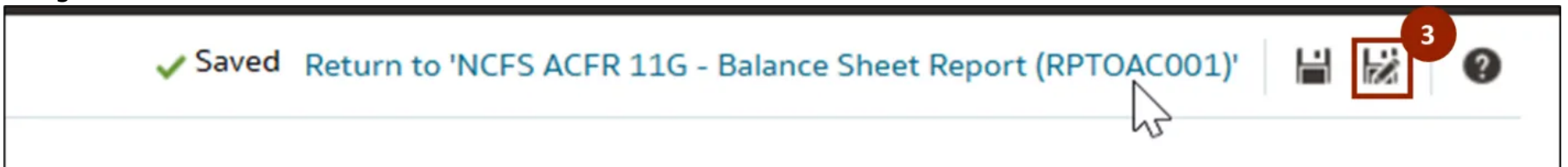
- **Save As** icon - To save a copy of the report to My Folder or Shared Folder.

Image



Step 3. If you would like to save a copy of the report in My Folder or the Shared Folder, click the **Save As** icon.

Image



Step 4. A **Save As** pop-up window is displayed. Enter the name of the report in the **Name** field.

Step 5. Enter the required description in the **Description** field.

Image

Save As

Folders

- My Folders
- Shared Folders
 - Demo and POC's
 - DSS
 - Journal Details
 - NCFS
 - OAC
 - OAC - Training
 - 1. Statewide Reports
 - 2. OSBM
 - 3. OSC
 - 4. FISCAL RESEARCH DIV
 - Subject Area Contents

Save In

/Shared Folders/OAC - Training/1

Performance Tuning Original

53P Conditional Report

Journal Details - NCFS 54F Report

Journal Details 50G Part2

Journal Details 53P

NCFS ACFR 11F - Fiduciary Net Position Rep

NCFS ACFR 11F - Fiduciary Net Position Rep

NCFS ACFR 11G - Balance Sheet Report (RP

Name

NCFS ACFR 11G - Balance Sheet Report (RPTOAC00

Description

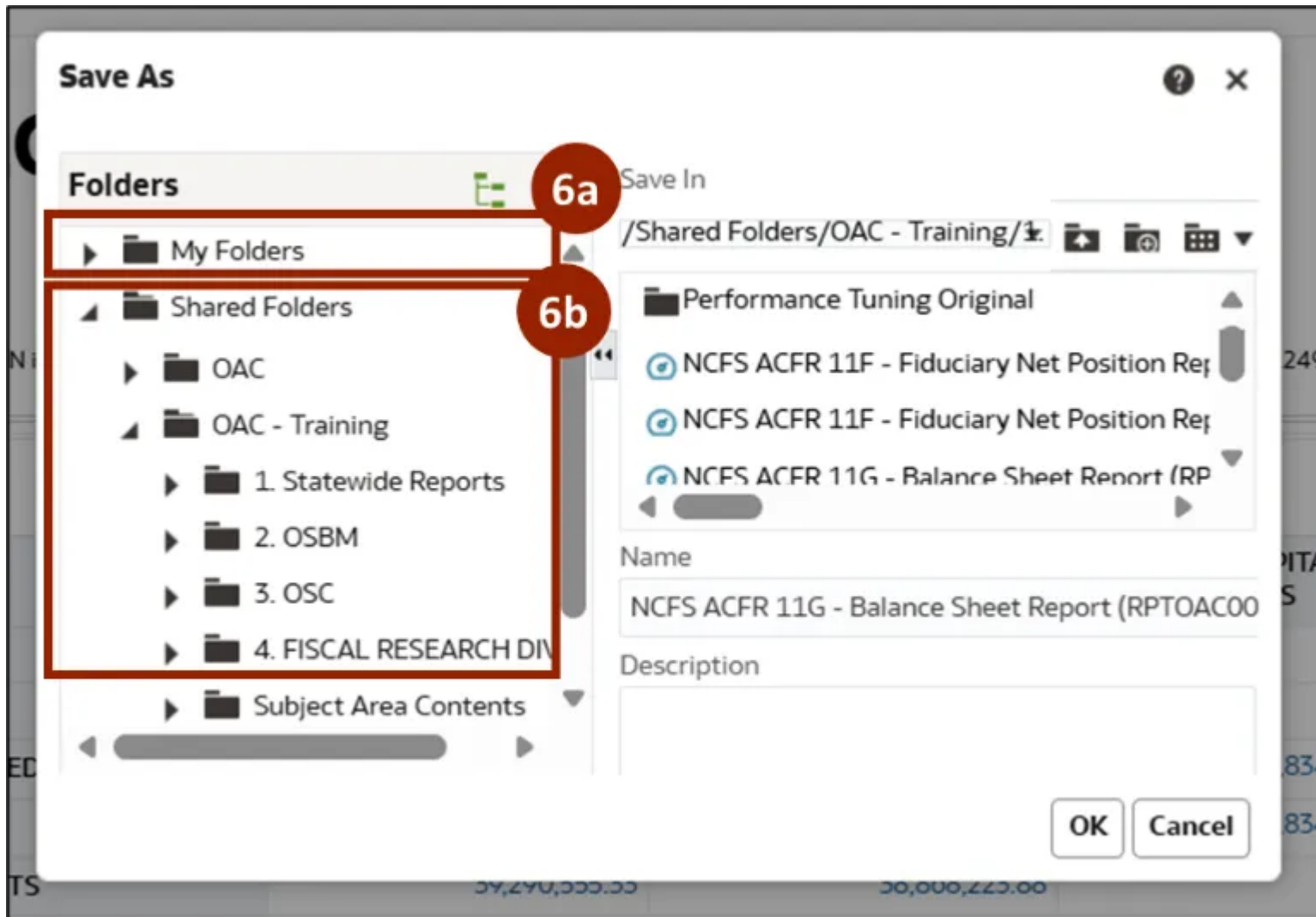
OK

Cancel

Step 6. The user can save the report in My Folders or Shared Folders:

- **My Folders:** This is a personal workspace unique to each user.
- **Shared Folder:** This enables sharing of the report with specific agencies such as OSBM, OSC, and the Fiscal Research Division.

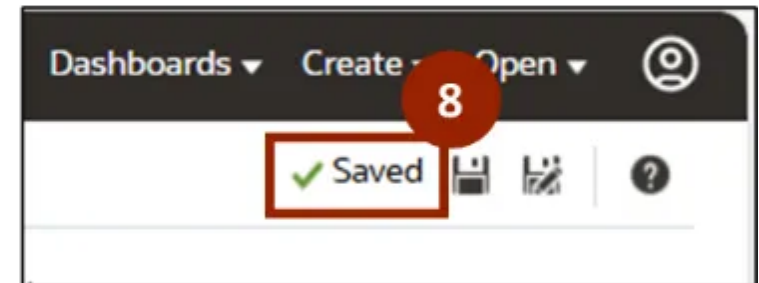
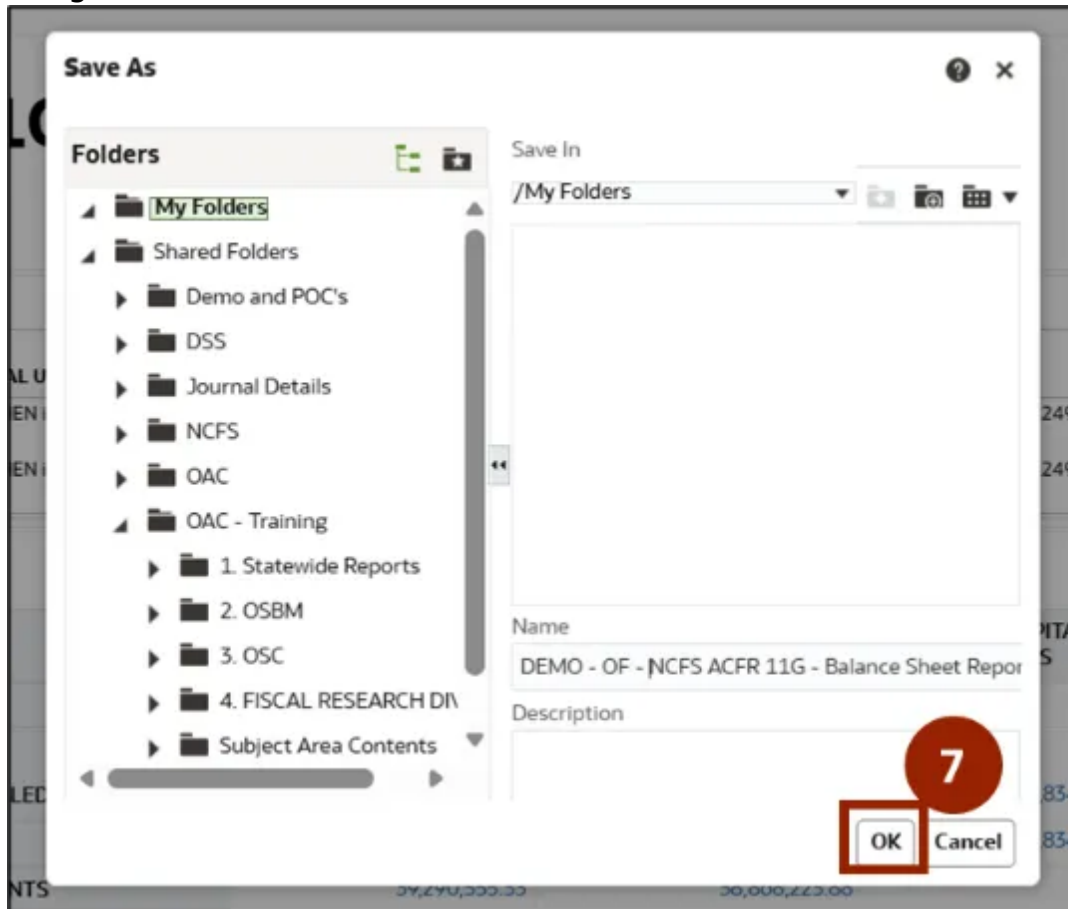
Image



Step 7. After selecting the desired folder, click **OK** to complete the save process.

Step 8. After saving, a **Saved** message appears at the top of the report, confirming that a copy of the report has been successfully saved in the selected folder.

Image



Note: The user can navigate to the folder where the report was saved (such as My Folders or Shared Folder) to view and access the saved report at any time.

Wrap-Up

Users can save and share a report in classic using the steps above by storing reports in My Folders for personal use or in Shared Folders for designated agencies.

Additional Resources

- Virtual Instructor Led Training (vILT)
 - [OAC for NCFS 1](#)

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