

OAC-06 Share a Classic Report by Email

Purpose

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

Introduction and Overview

This QRG covers the process of sharing a classic report by email in OAC. By creating Agents, users can automate the delivery of important reports or alerts to themselves or others, either on a set schedule or when specific conditions are met. Notifications can be sent as dashboard alerts or directly to email, ensuring users stay informed without manual monitoring.

Share a Report via Email

In OAC, Agents can be created to **automatically send important reports or alerts to users, either on a set schedule** (like daily, weekly, monthly) or when **specific conditions are met** (such as going over a budget limit).

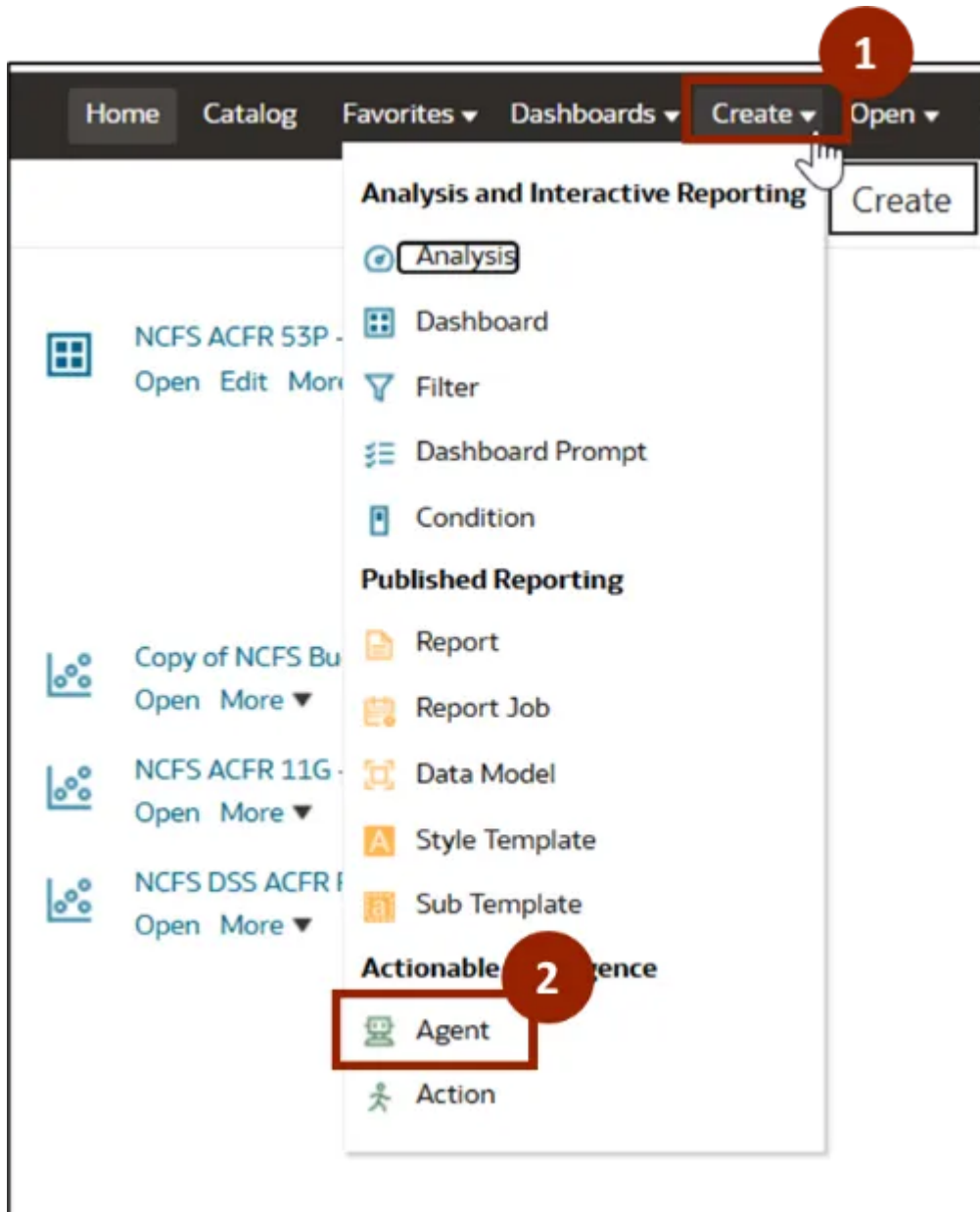
Notifications can be delivered through **dashboard alerts or directly to your email**, making it easy to stay updated without manual checks.

Follow the below steps to share a report via email. There are 17 steps to complete this process.

Step 1. To share a report via email, **navigate** to **OAC Home** page. Click **Create**.

Step 2. A pop-up menu appears. Click **Agent**.

Image



Step 3. An **Untitled Agent** screen is displayed. In the **General** tab, set **Priority** and **Run As**.

Step 4. In the **Schedule** tab, enter the **scheduling details** as required.

Image

The image consists of two screenshots of the 'Untitled Agent' configuration interface.

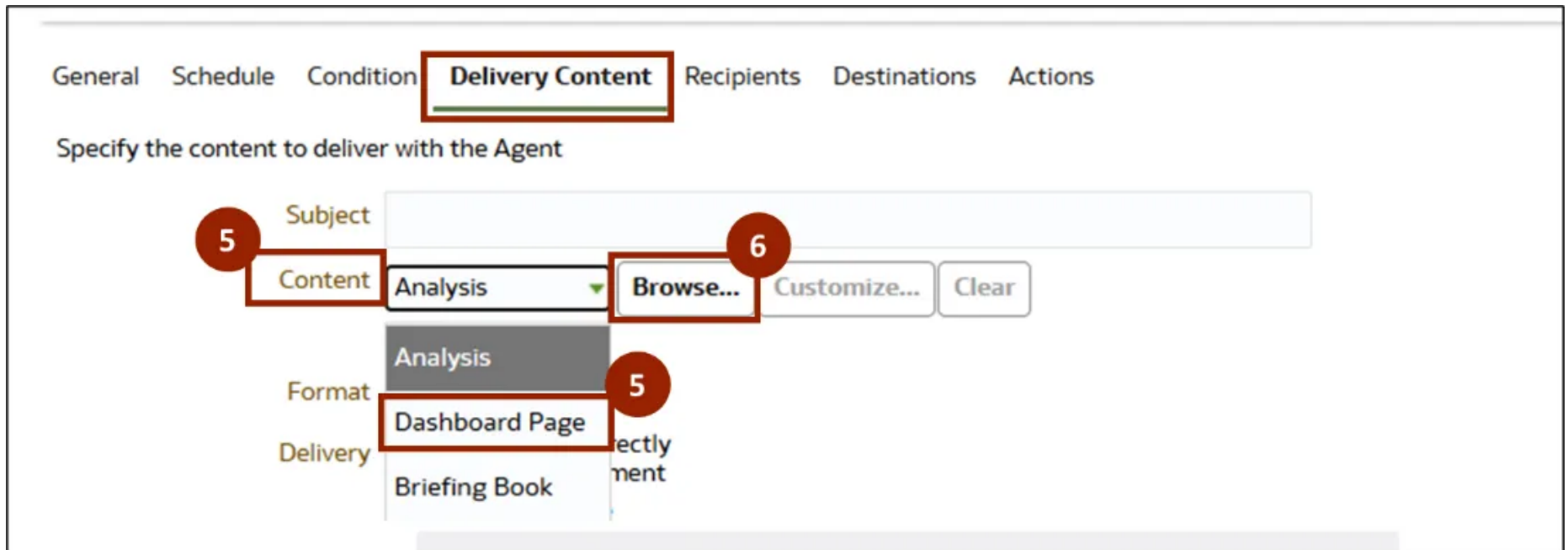
The left screenshot shows the 'General' tab. A red box highlights the 'Priority' and 'Run As' options, with a circled '3' next to it. The 'Priority' section has three radio buttons: 'High', 'Normal' (selected), and 'Low'. The 'Run As' section has two radio buttons: 'Recipient' and 'Use Agent Owner's Credentials' (selected). The text below the box reads: 'Set the priority level for this Agent as well as options for impersonating a different user at runtime.'

The right screenshot shows the 'Schedule' tab. A red box highlights the scheduling configuration options, with a circled '4' next to it. The options include: 'Enabled' (checked), 'Frequency' (set to 'Never'), 'Start' (set to '11/10/2025 03:27:00 PM' with a 'Default' button), 'Re-run Agent Every' (set to '15' with a 'Minutes' label), and 'Until' (set to '11:59:00 PM' with a 'Default' button).

Step 5. In **Delivery Content** tab, select **Dashboard Page** from the drop-down.

Step 6. Click **Browse**.

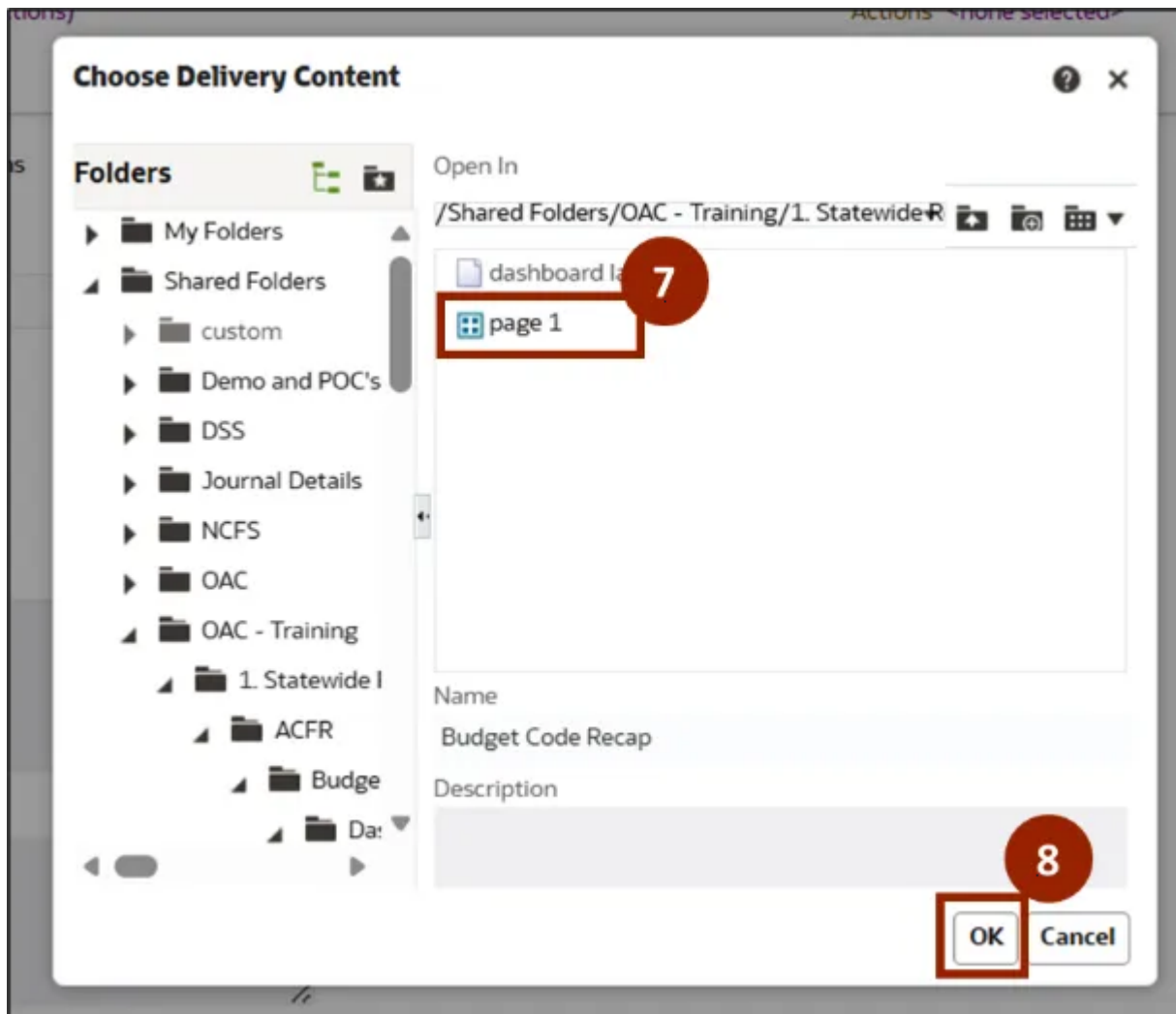
Image



Step 7. The **Choose Delivery Content** pop-up window is displayed. Select the **desired dashboard** page from the folders.

Step 8. Click **OK**.

Image



Step 9. Once the content is attached, review the other details displayed such as **Format**, **Delivery**, and **Attachment Note**.

Image

General Schedule Condition **Delivery Content** Recipients Destinations Actions

Specify the content to deliver with the Agent

Subject

Content Dashboard Page ▾ Browse... Customize... Clear

/Shared Folders/OAC - Training/1. Statewide Reports/ACFR/Budget to Actuals/Dashboards/NCFS ACFR 17G - Combining Schedule of Revenues and Expenditures - General Fund Report (RPTOAC016)/page 1

Entire Dashboard ☐

Format PDF ▾

Delivery ☐ Deliver results directly
☒ Deliver as attachment

Attachment Note

If Condition is False ☐ Deliver this message

9

Step 10. Navigate to **Recipients** tab. Click the **plus** icon to add recipients.

Image

GeneralScheduleConditionDelivery ContentRecipientsDestinationsActions

Direct Agent Recipients ⚠️

Specify who will receive this Agent.

Select Recipients

Show All

+

10

Name
 Aqsa Shoeb

Publish for Subscription

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

☐ Publish Agent for subscription

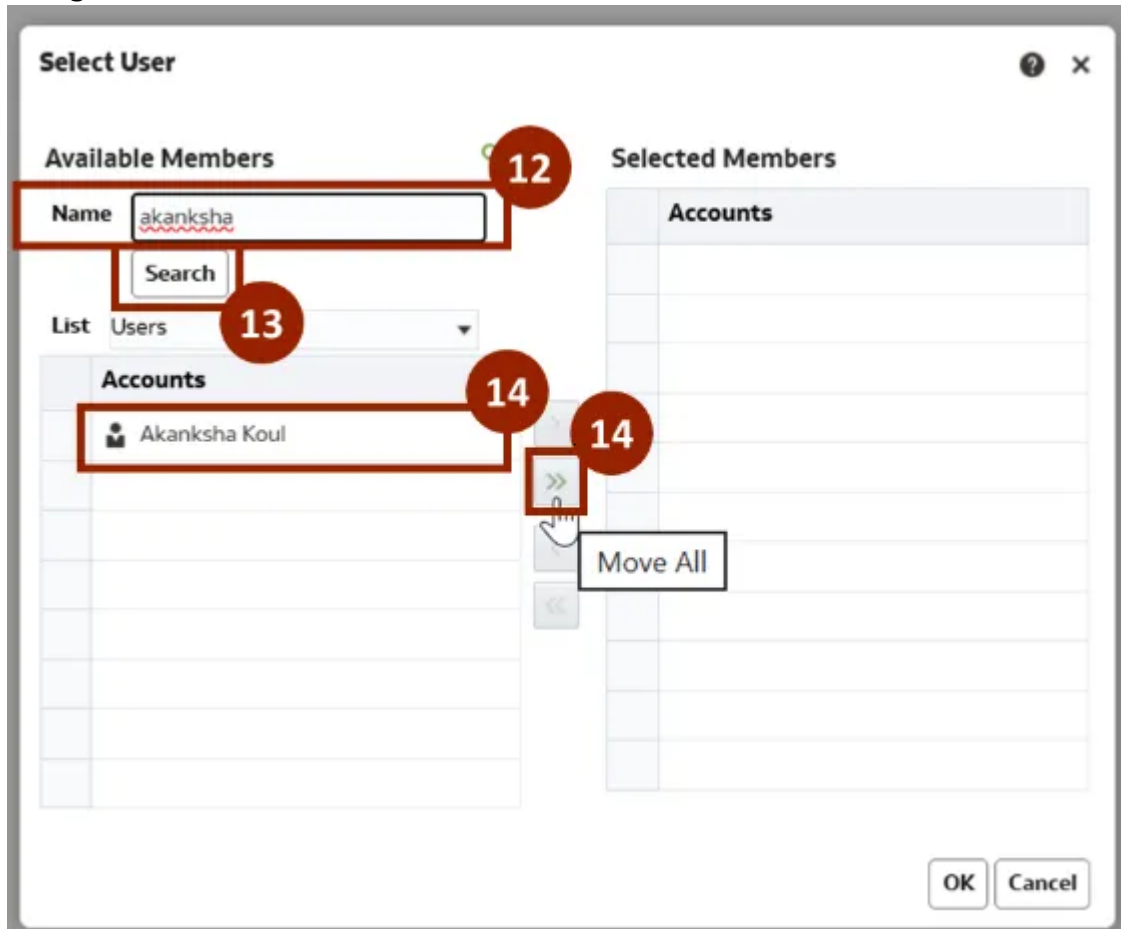
☐ Allow subscribers to customize Agent

Step 11. The **Select User** pop-up window is displayed. Select **User** from the **List** drop-down.

Image

Step 14. The Accounts section shows the required name. Click the **Move All** icon to move the user to Selected Members section.

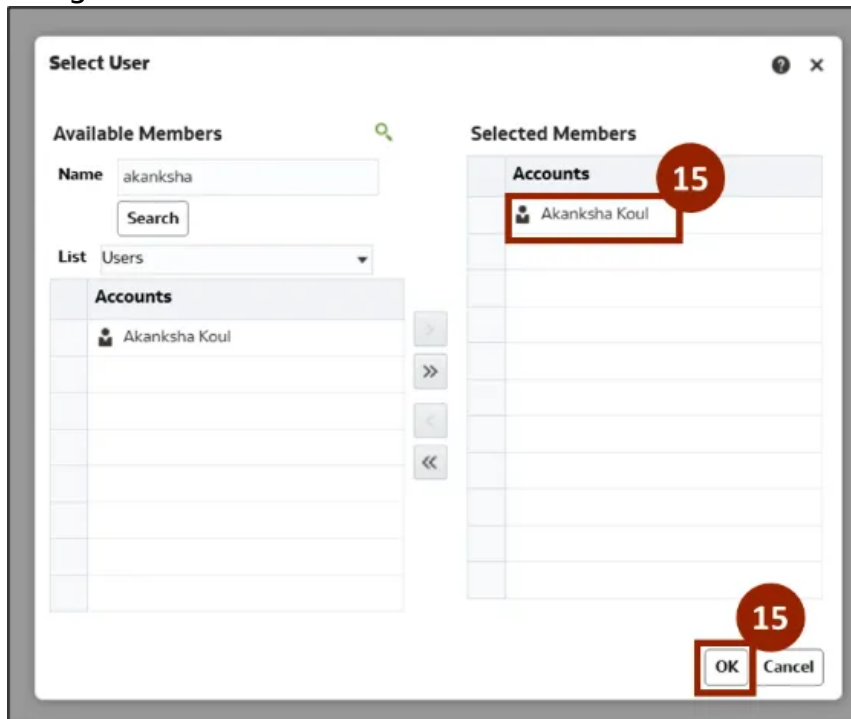
Image



Step 15. Once the user is moved to the **Selected Members** section, click **OK**.

Step 16. In the **Destination** tab, specify where agents will be delivered and enter the required details.

Image



Step 17. Click **Save this Agent** icon to save the agent.

Image



Wrap-Up

By following the steps above, OAC users can use Agents to automate report sharing by email or dashboard alerts, ensuring timely updates without the need for manual checks.

Additional Resources

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

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