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).

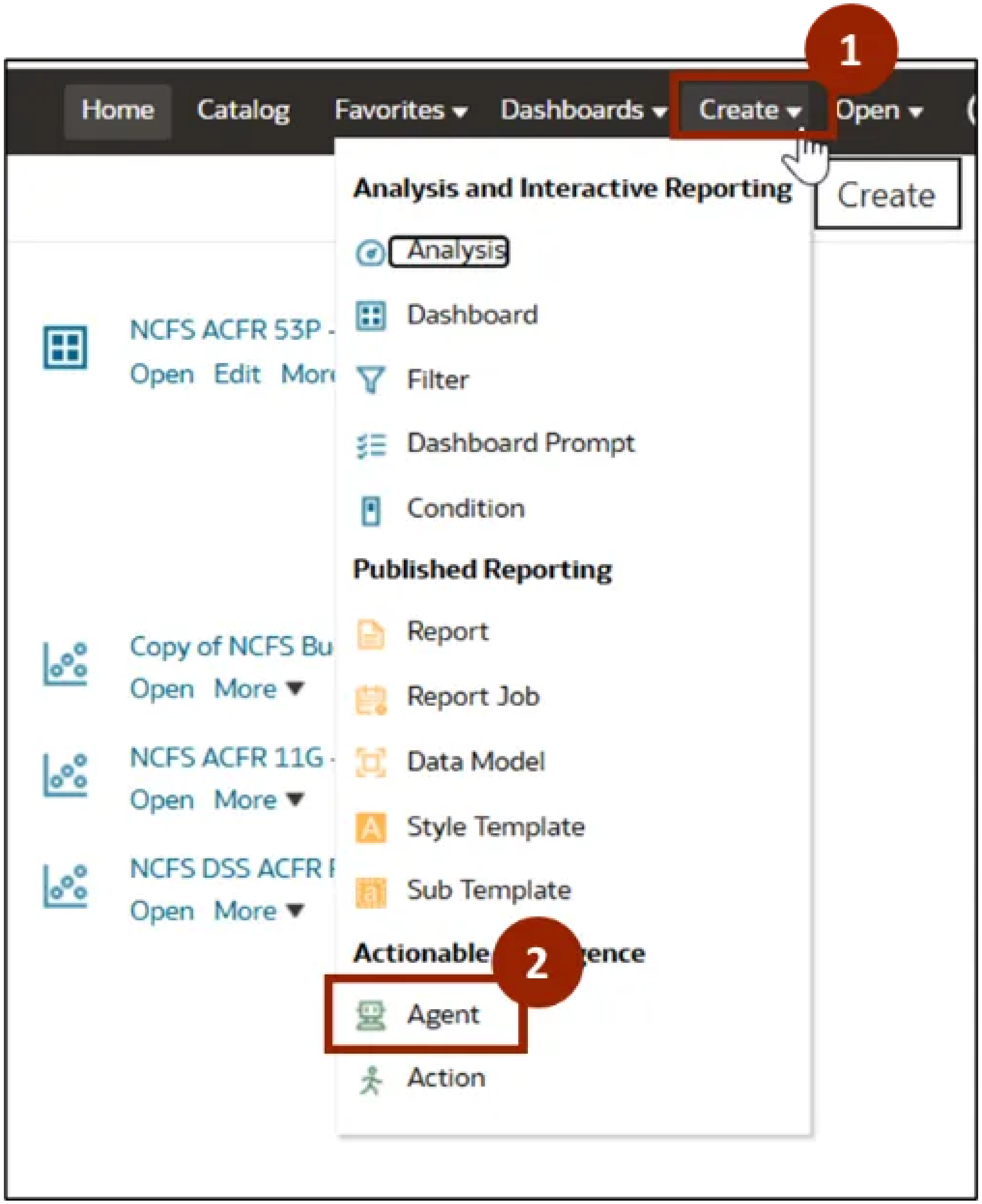
Notifications can be delivered through **dashboard alerts or directly to your email**, making it easy to stay updated without manual checks.

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**.

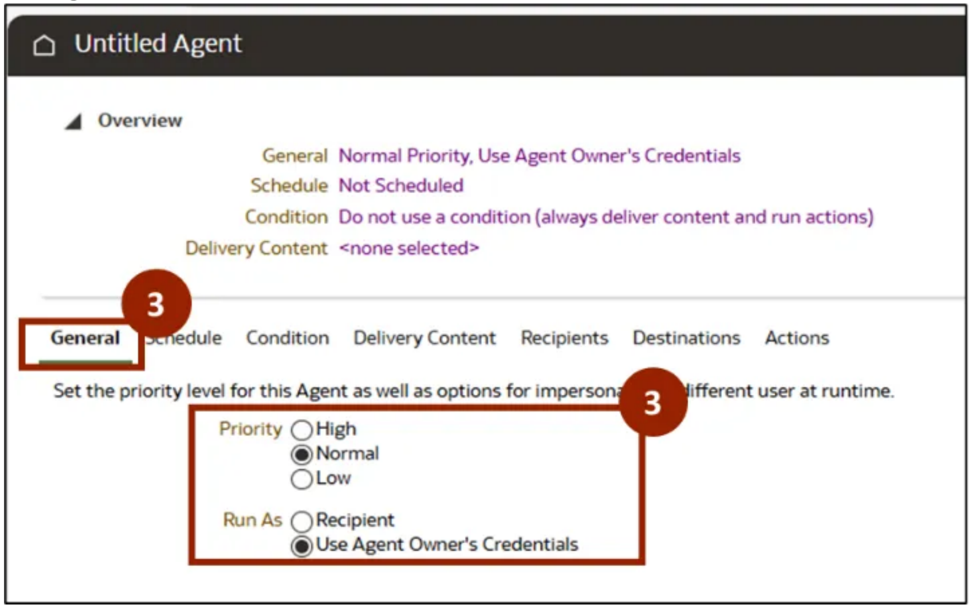
Image

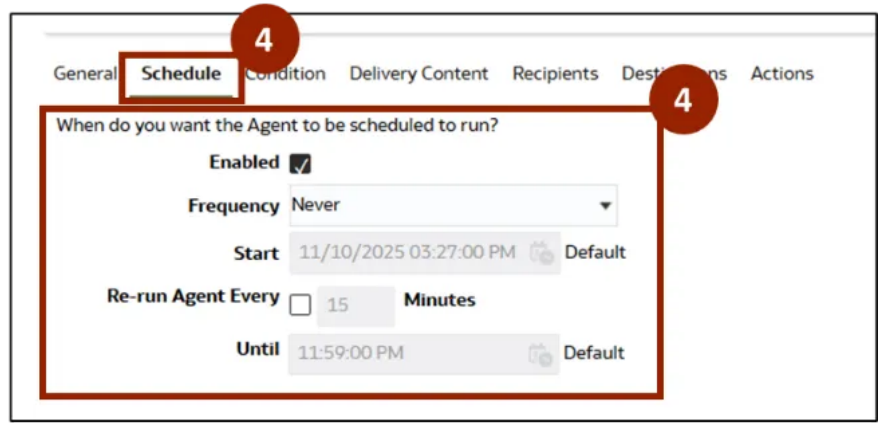


Step 3. An **Untitled Agent** screen is displayed. In the **General** tab, set **Priority** and **Run As**.

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

Image

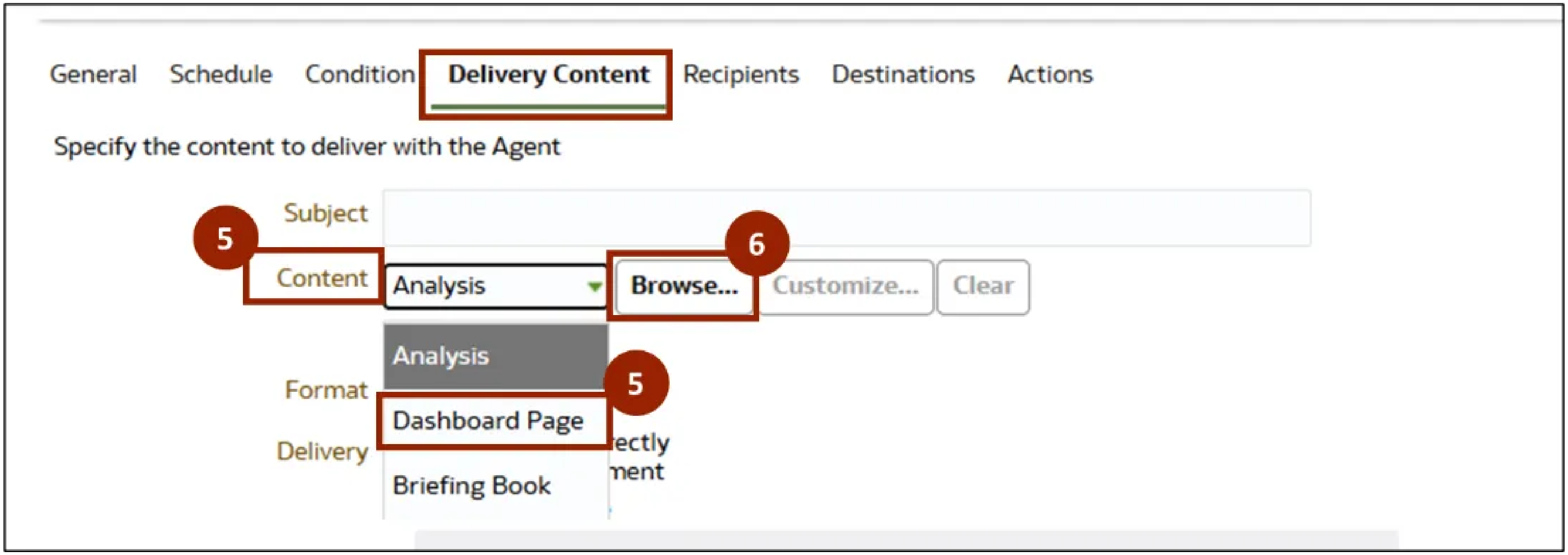




Step 5.	In **Delivery Content** tab, select **Dashboard Page** from the drop-down.

Step 6.	Click **Browse**.

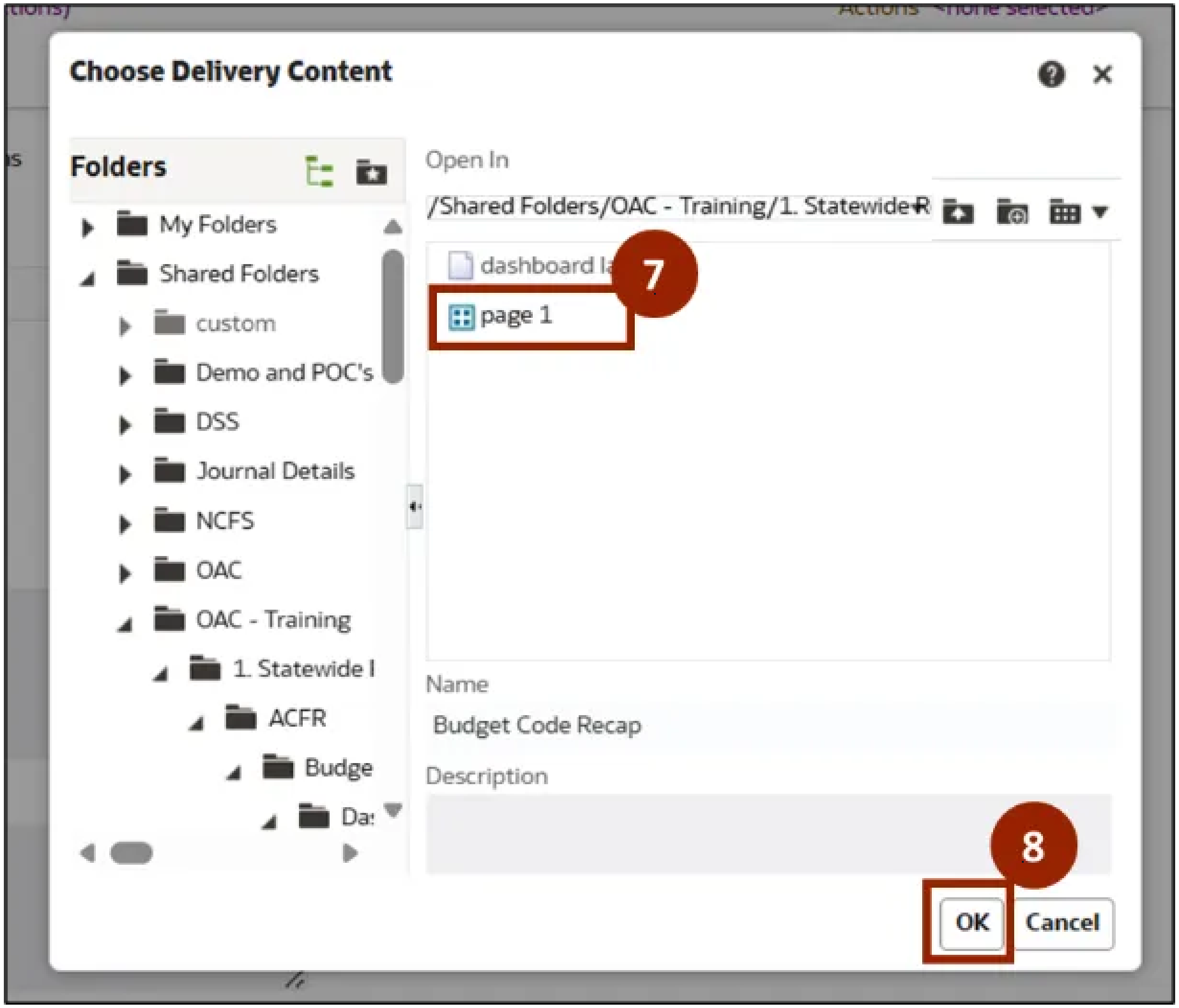
Image



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

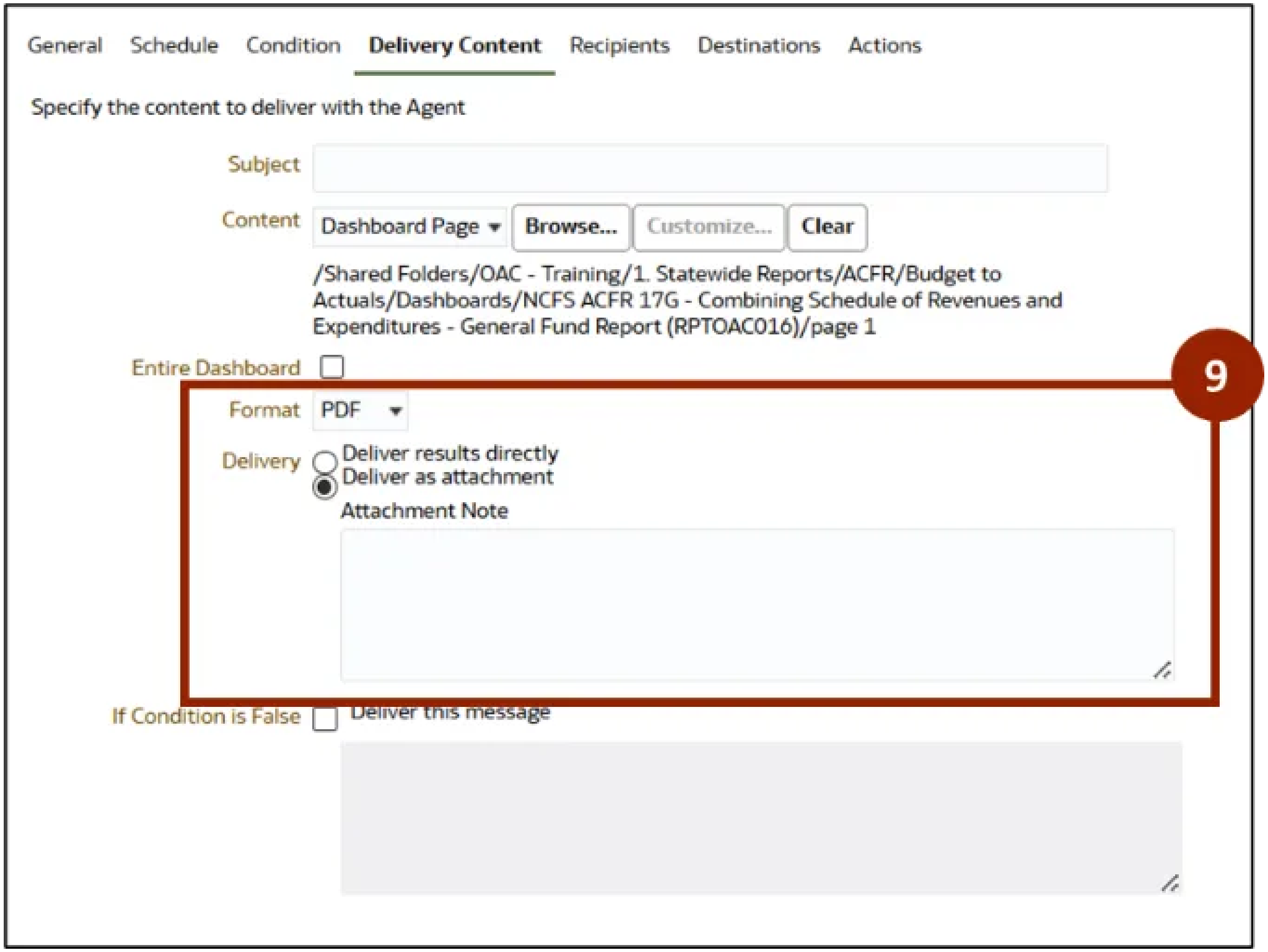
Step 8.   Click **OK**.

Image



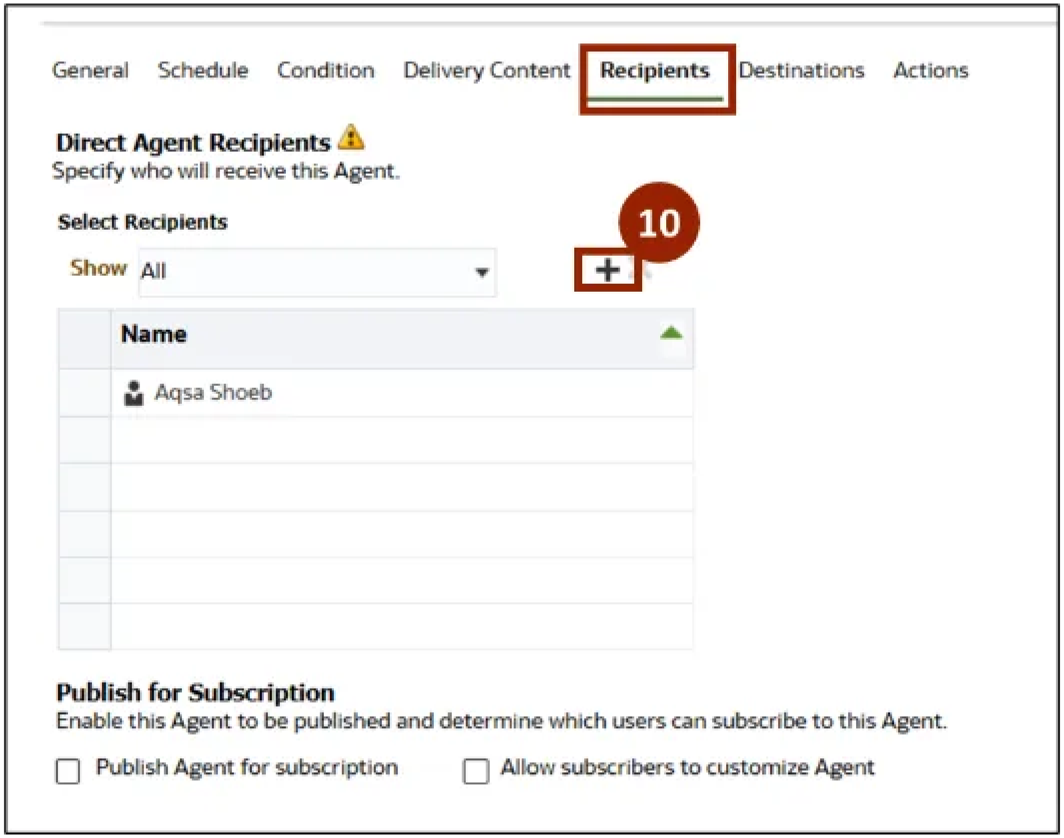
Step 9. Once the content is attached, review the other details displayed such as **Format, Delivery**, and **Attachment Note**.

Image



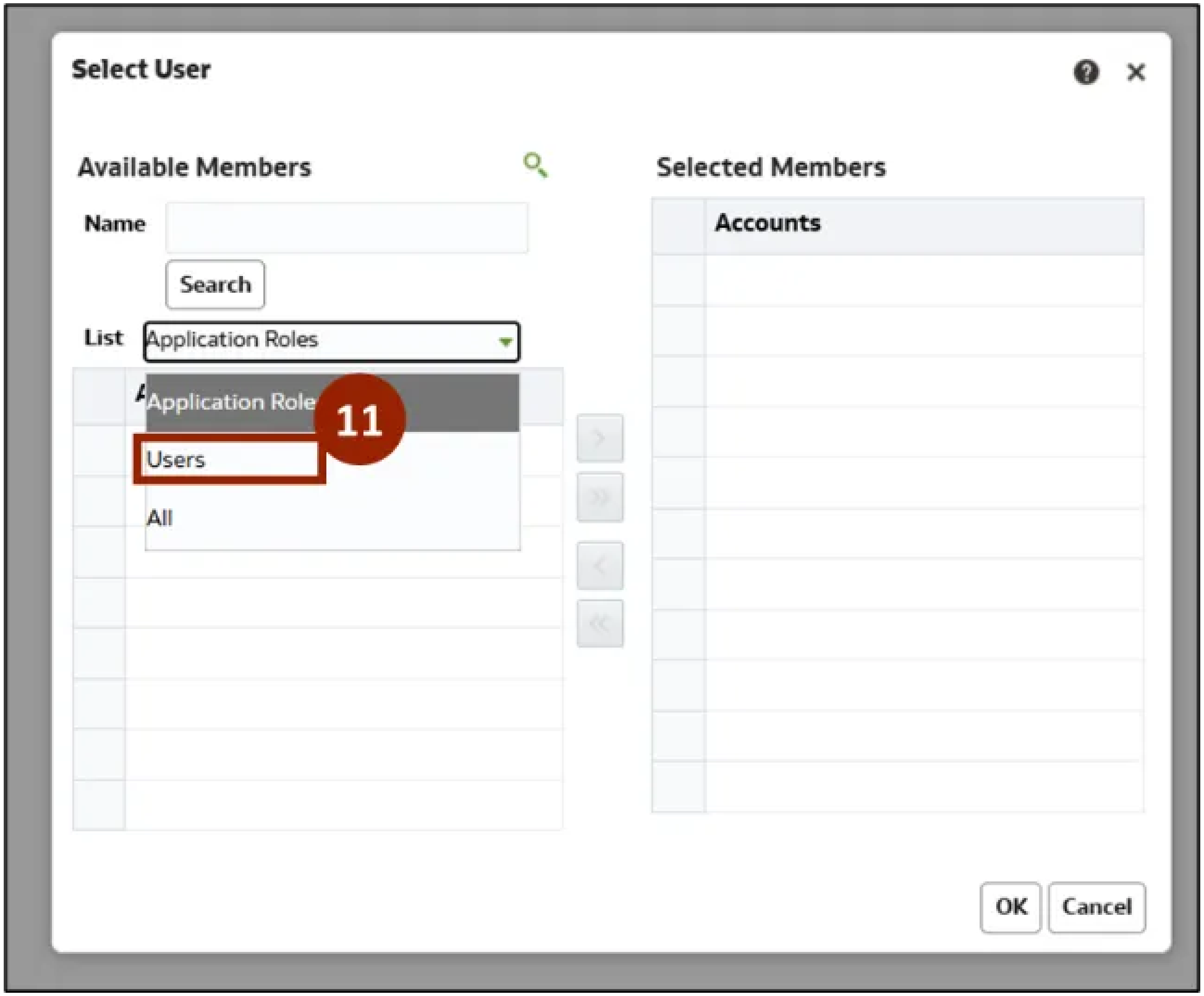
Step 10. Navigate to **Recipients** tab. Click the **plus** icon to add recipients.

Image



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

Image



Step 12. Enter the **name** in the Name field.

Step 13. Click **Search**.

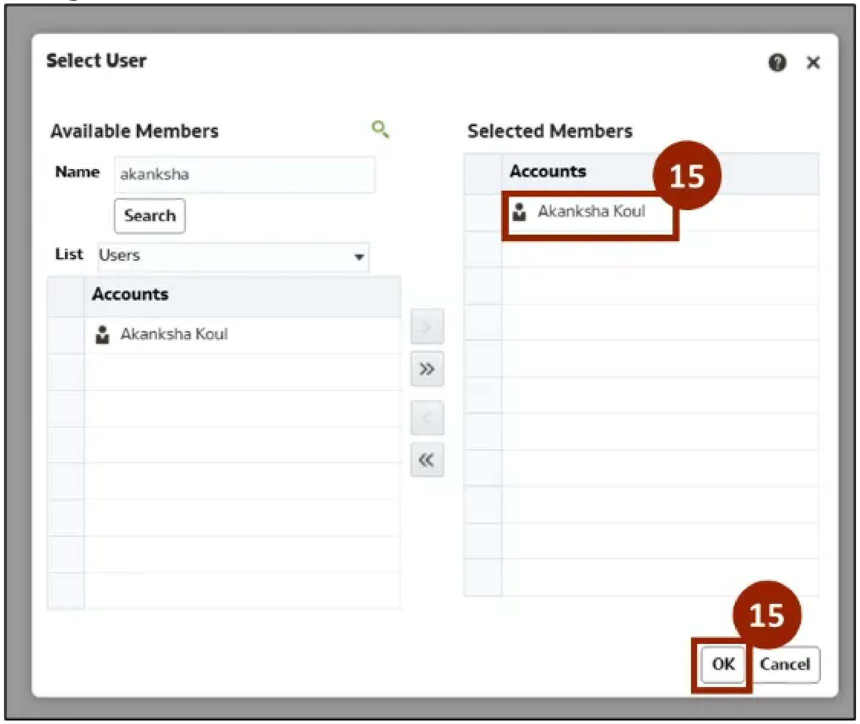
Step 14. The Accounts section shows the required name. Click the **Move All** icon to move the user to Selected Members section.

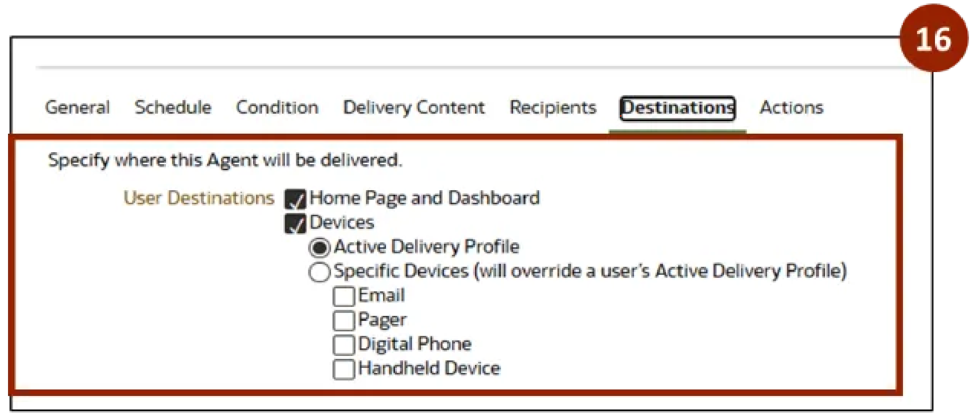
Image

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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