



SAVE AND SHARE A REPORT

QUICK REFERENCE GUIDE

OAC

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 eight steps to save and share a report in OAC classic.

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

NCFS ACFR 11G - Balance Sheet Report (RPTOAC001)

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

Criteria Results Prompts Advanced

Subject Area: NCFS - Balances

Compound Layout

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

Filters:

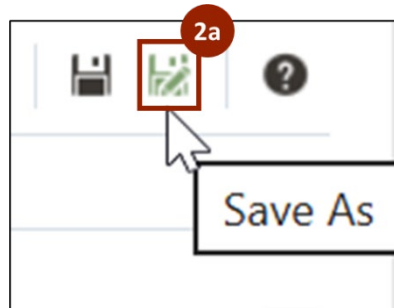
Fiscal Period Name is equal to 11_Jun-24
and Ledger Name is equal to NC MODIFIED ACCRUAL US
and ifnull(CASE WHEN Parent3 = '909900' THEN ifnull(CASE WHEN Child/Parent 3 IN ('21999999', '22159999', '21521999', '21169999', '21629999', '21239999', '21249999', '21250999', '22239999', '21269999', '21279999', '21811999', '21711999', '21719999', '21315999', ... is not null
and ifnull(CASE WHEN Parent3 = '909900' THEN ifnull(CASE WHEN Child/Parent 3 IN ('21999999', '22159999', '21521999', '21169999', '21629999', '21239999', '21249999', '21250999', '22239999', '21269999', '21279999', '21811999', '21711999', '21719999', '21315999', ... is not equal to / is not in 0

Pivot Table

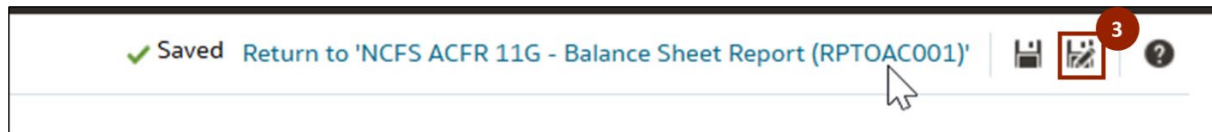
Account GOV Hierarchy	11990G - GENERAL FUND (ALL)	12990G - SPECIAL REVENUE FUNDS	14990G - CAPITAL PROJECTS FUNDS	15990G - PERMANENT FUNDS	90990G - NOT INCLUDED FOR BUDGET AND/OR GAAP
ASSETS AND OTHER DEBITS					
CASH, CASH EQUIV, AND POOLED CASH					
11999999 - CASH, CASH EQUIV, AND POOLED CASH	23,950,505,397.52	5,032,811,893.86	1,834,296,430.21	55,680,361.53	69,505,283.78
11129998 - POOLED CASH	25,920,214,842.19	4,995,945,699.98	1,854,293,805.21	55,680,361.53	69,499,685.78
11199999 - CASH AND CASH EQUIVALENTS	39,290,555.33	38,868,223.88	2,625.00		5,000.00
INVESTMENTS					

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

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

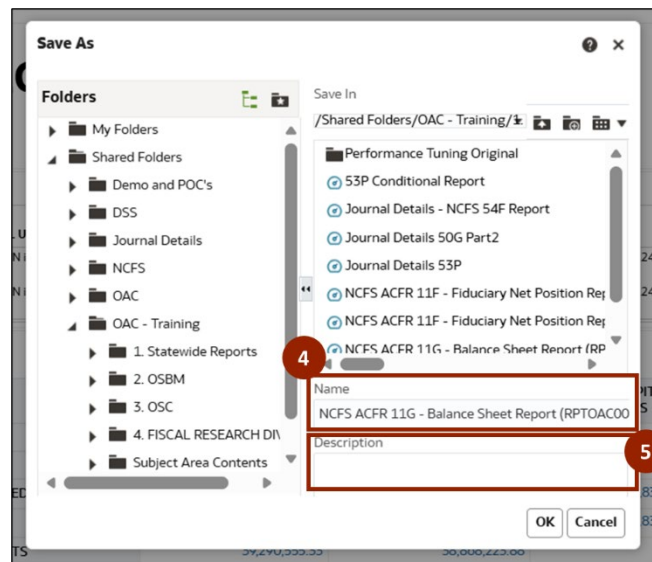


Step 3: If you would like to save a copy of the report in My Folder or the Shared Folder, click the **Save As** icon.



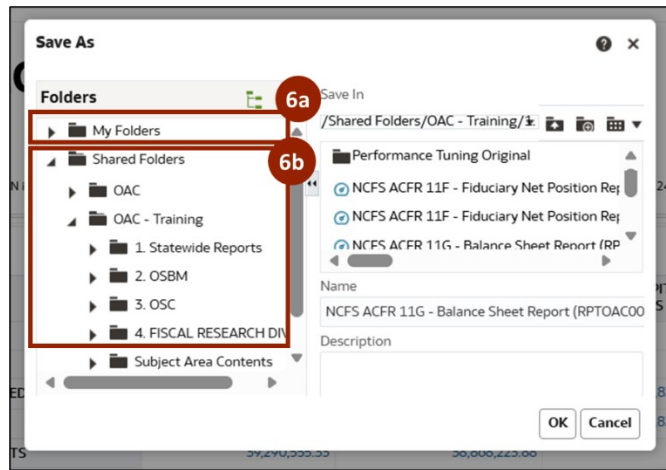
Step 4: A **Save As** pop-up window is displayed. Enter the name of the report in the **Name** field.

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



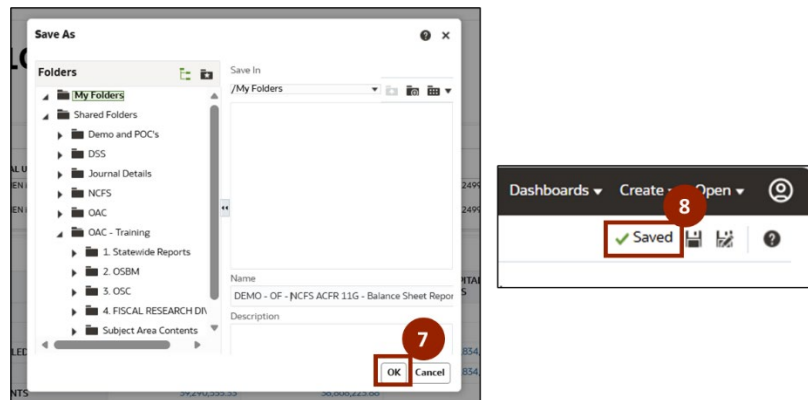
Step 6: The user can save the report in My Folders or Shared Folders:

- 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.



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.



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