



# SHARE A CLASSIC REPORT BY EMAIL

OAC

## QUICK REFERENCE GUIDE

### 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

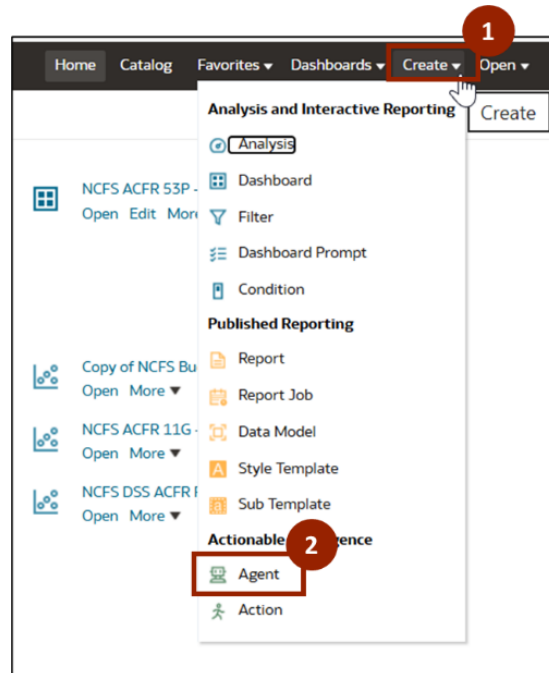
In OAC, Agents can be created to **automatically send important reports or alerts to users, either on a set schedule** (like daily, weekly, monthly) or when **specific conditions are met** (such as going over a budget limit).

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

Follow the 17 steps to share a report via email:

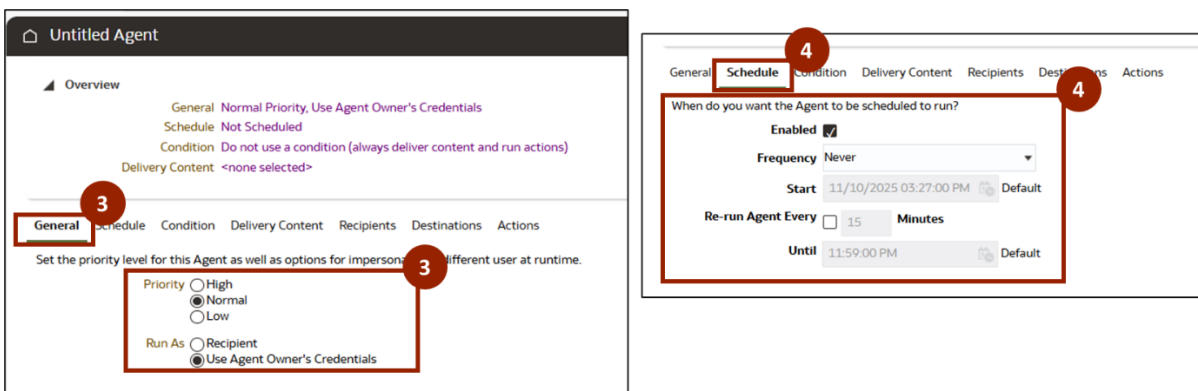
Step 1: To share a report via email, **navigate** to OAC **Home** page. Click **Create**.

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



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.



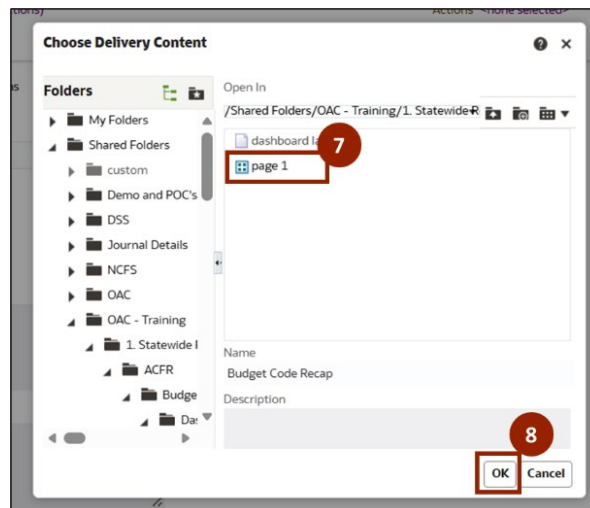
Step 5: In **Delivery Content** tab, select **Dashboard Page** from the drop-down.

Step 6: Click **Browse**.

The screenshot shows the 'Delivery Content' tab of a configuration window. The 'Content' dropdown menu is open, showing options: 'Analysis', 'Dashboard Page', and 'Briefing Book'. The 'Format' dropdown is set to 'Analysis'. The 'Delivery' dropdown is set to 'Directly'. The 'Subject' field is empty. The 'Browse...' button is highlighted. Red circles with numbers 5 and 6 are placed over the 'Content' dropdown and the 'Browse...' button respectively.

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

Step 8: Click **OK**.



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

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

Specify the content to deliver with the Agent

Subject

Content Dashboard Page

/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

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

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

**Direct Agent Recipients** ⚠️

Specify who will receive this Agent.

Select Recipients

Show All

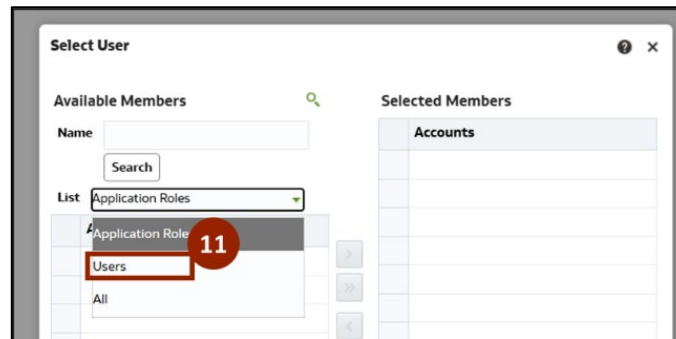
Name
Aqsa Shoeb

**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

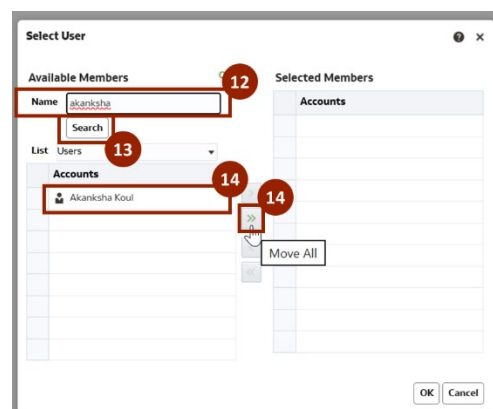
Step 11: The **Select User** pop-up window is displayed. Select **User** from the List drop-down.



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

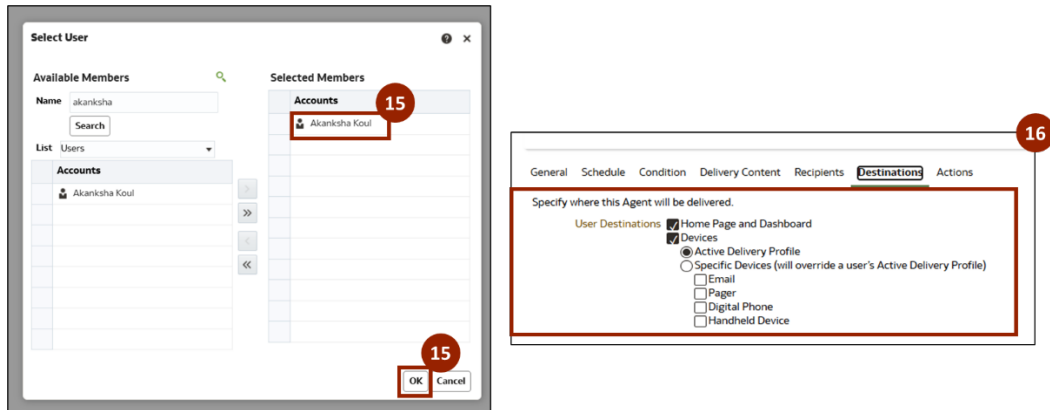
Step 13: Click Search.

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



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

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



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



## 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