OAC-12 Save and Share a Report in OAC DV

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to save and share a report in Oracle Analytics Cloud (**OAC**) DV.

Introduction and Overview

This QRG covers the process of saving and sharing a report in OAC DV. 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.

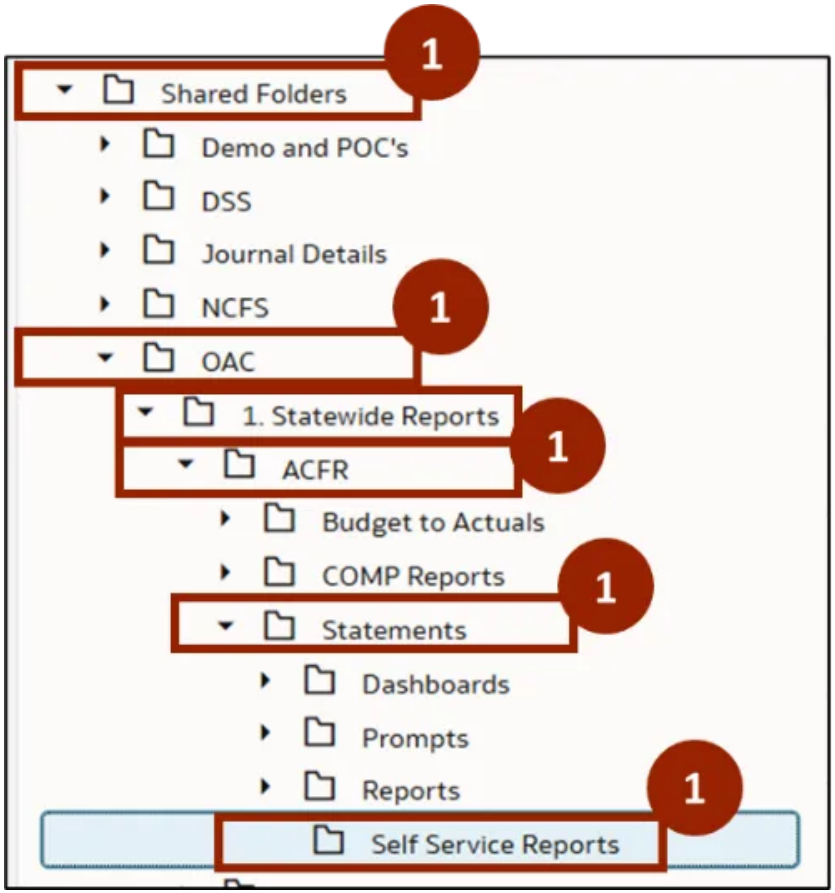
Save and Share a Report

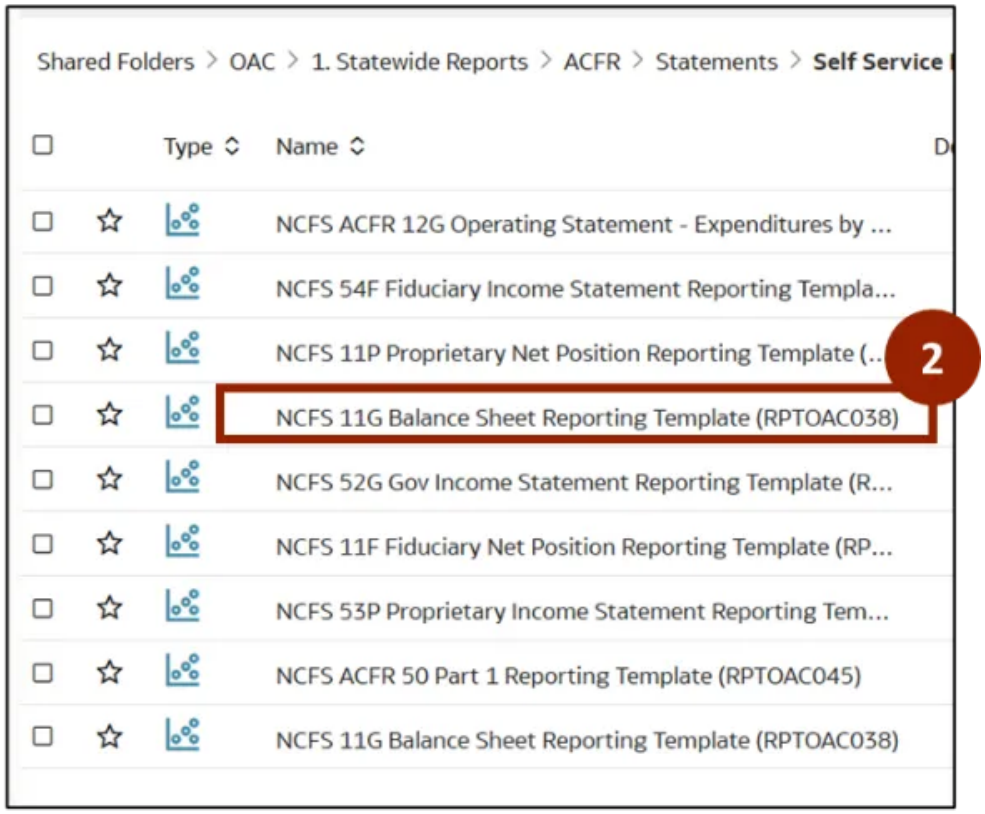
To save and share a report, please follow the steps below. There are 15 steps to complete this process.

Step 1. Navigate to the **Shared Folders**, then open the **OAC** folder. In the OAC folder, click **Statewide Reports** and select **ACFR**. In the ACFR folder, click **Statements**, then click **Self Service Reports**.

Step 2. A list of DV templates is displayed within the selected report type. Double-click **NCFS 11G - Balance Sheet Reporting Template (RPTOAC038)** report.

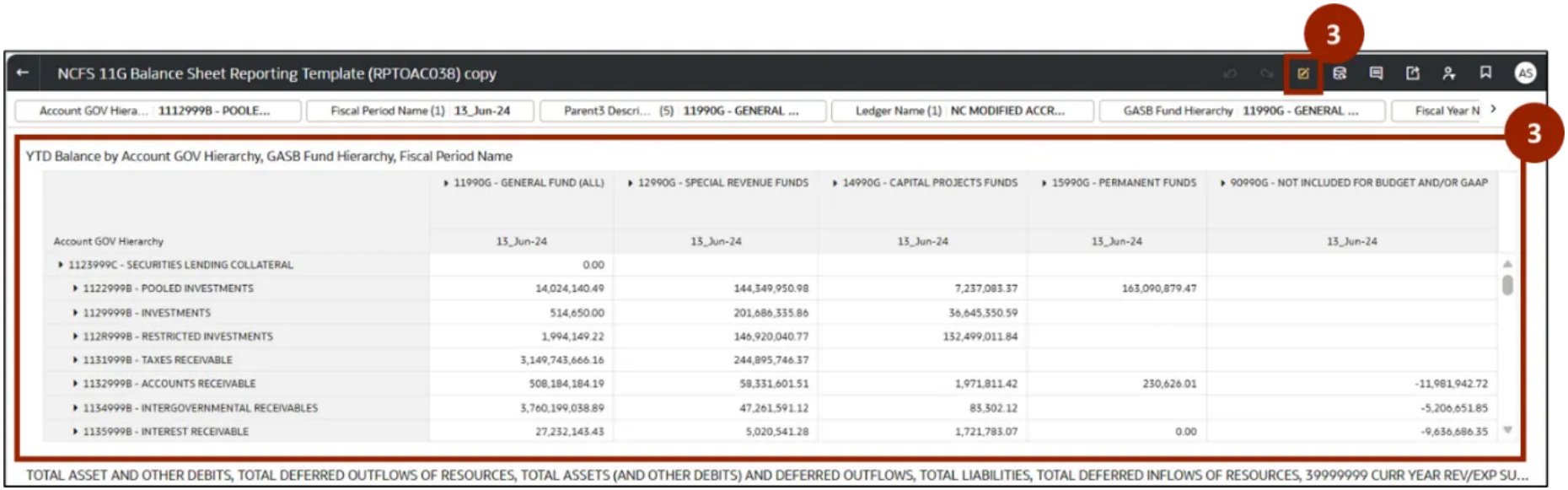
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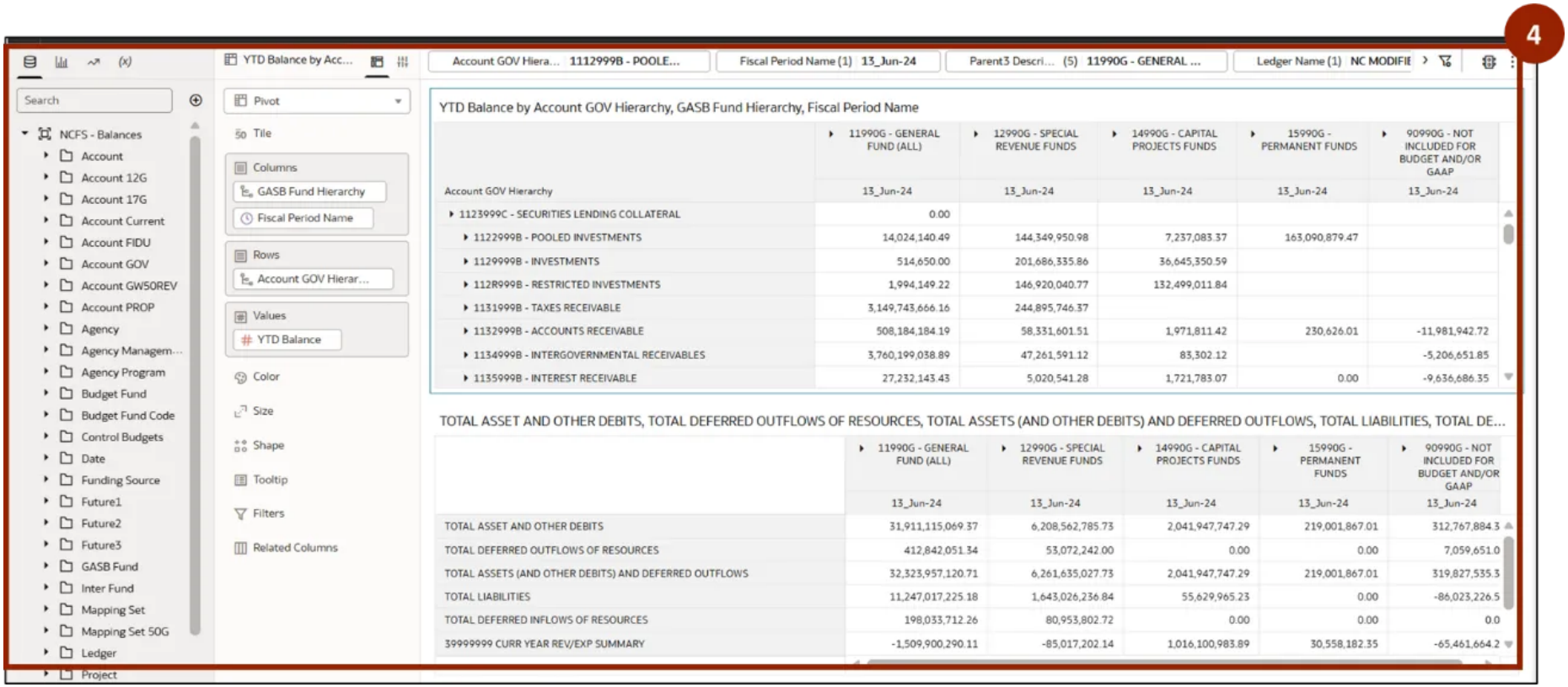
Step 3. Once the report is open, click the **Edit** icon.

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Step 4. The report opens in edit mode. The user can perform the required analysis in the report.

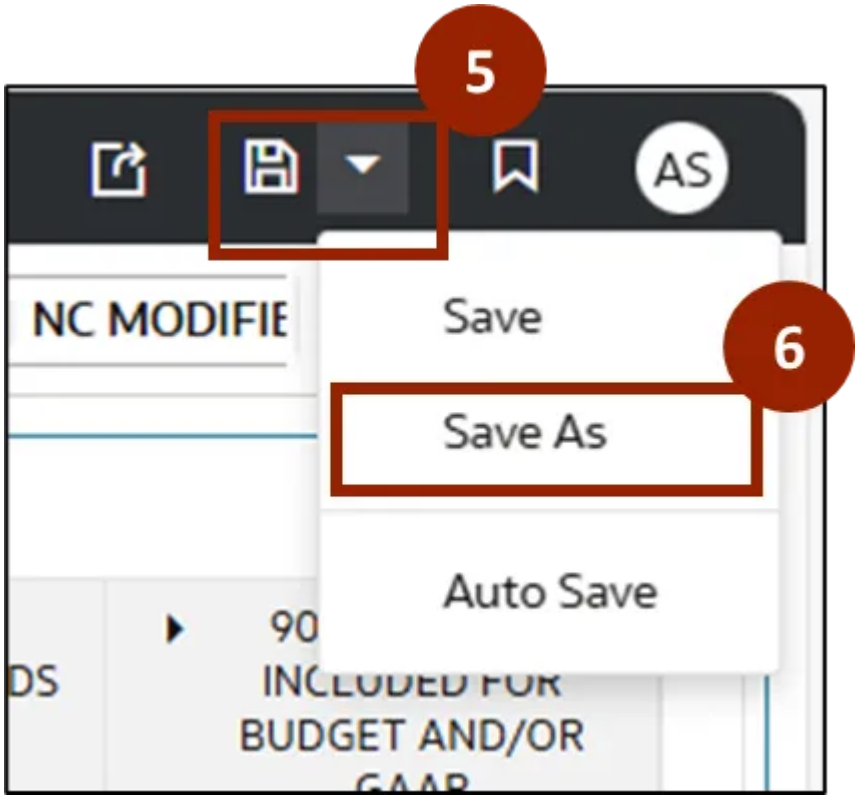
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Step 5. Click the **Save** drop-down icon on top right of the screen.

Step 6. Click **Save As** to save a copy of the report in My Folder or Shared Folder to perform the analysis.

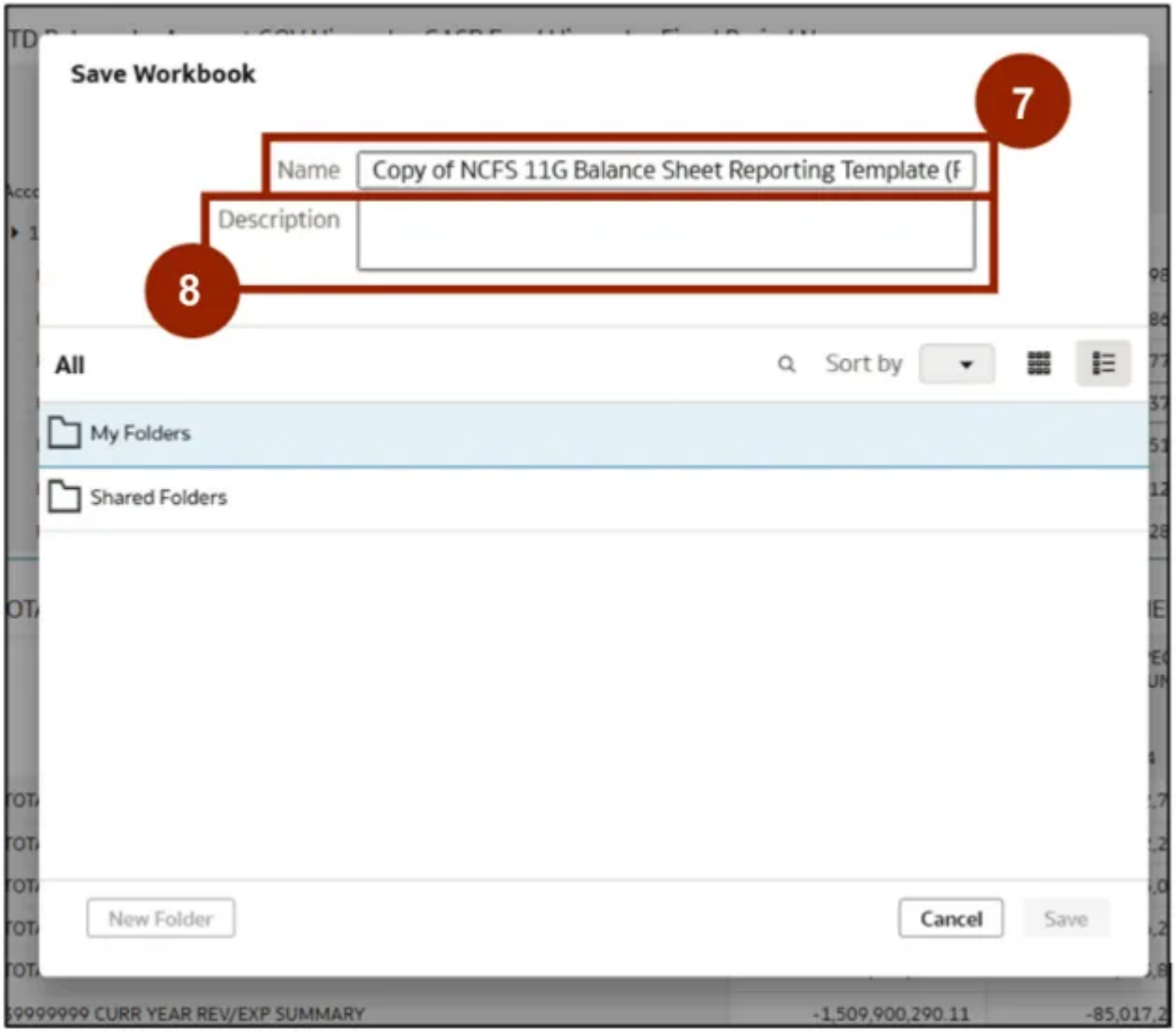
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Step 7. A **Save Workbook** pop-up window is displayed. Enter the name of the workbook in the **Name** field.

Step 8. Enter the required description in the **Description** box.

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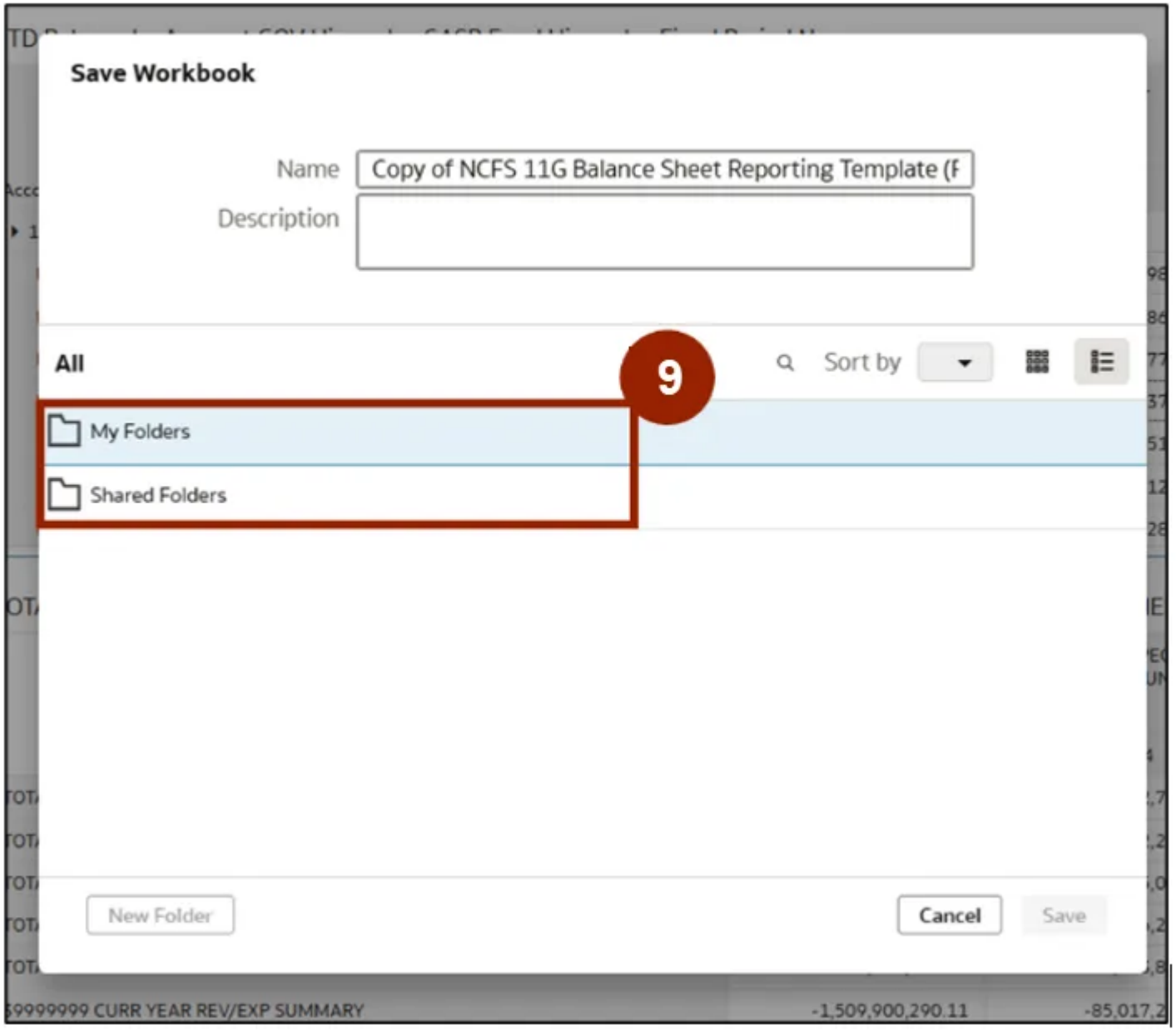


Step 9. The user should save the report in My Folders or Shared Folders:

- **My Folders**: This is a personal workspace unique to each user.

- **Shared Folder:** It enables sharing of the report with specific agencies such as OSBM, OSC, and the Fiscal Research Division.

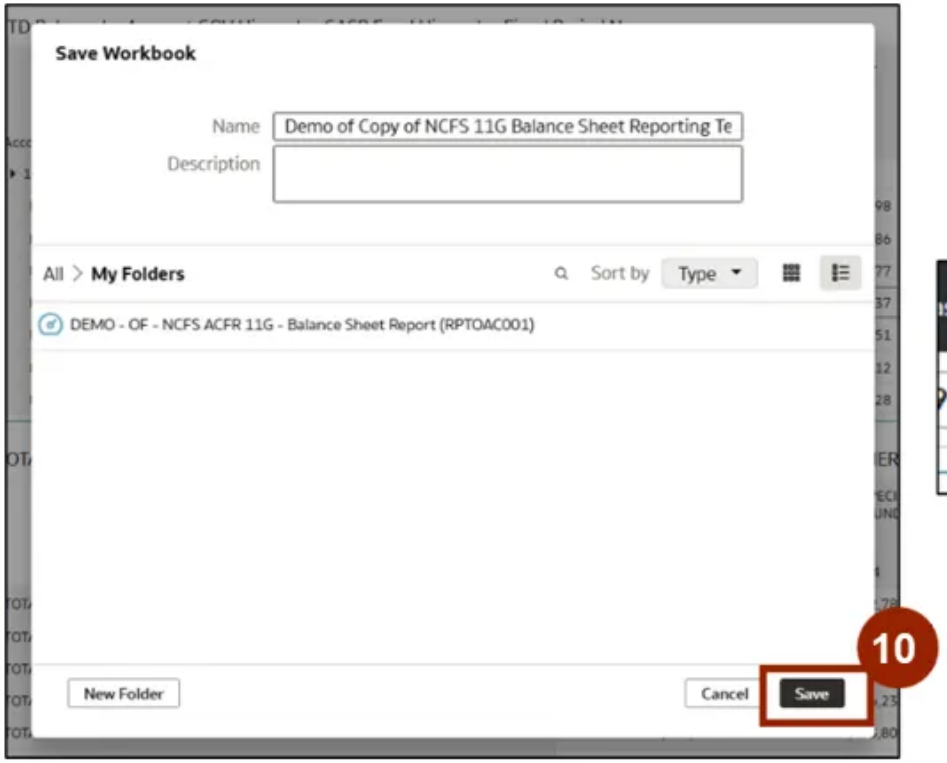
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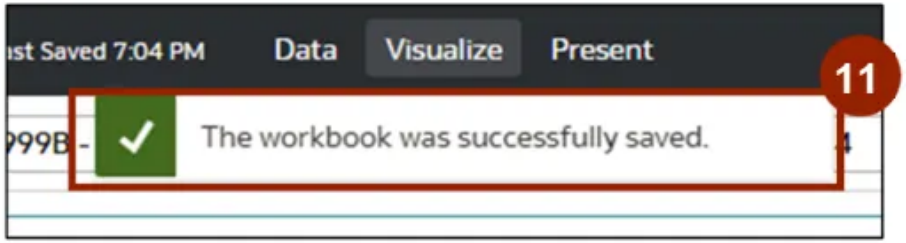


Step 10. After selecting the desired folder, click **Save** to complete the save process.

Step 11. After saving, “**The workbook was successfully 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 (My Folders or Shared Folder) to view and access the saved report at any time.

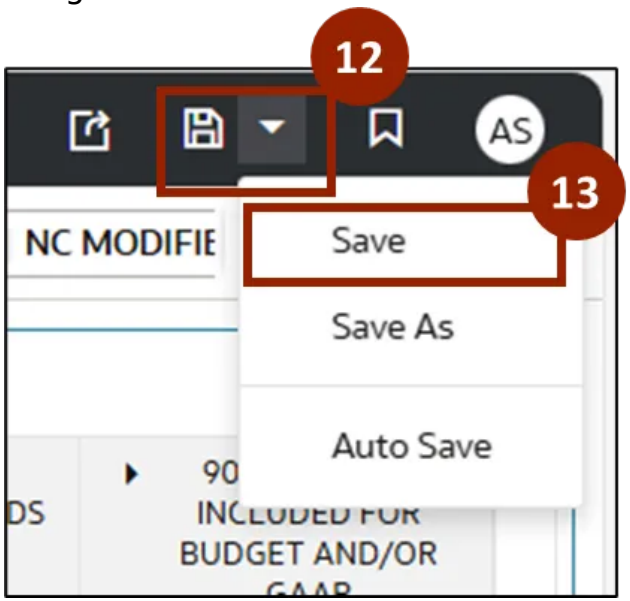
Step 12. Once a copy of the report has been saved, the user can continue making updates to the copied report. To save changes in the report, the user should perform the following steps:

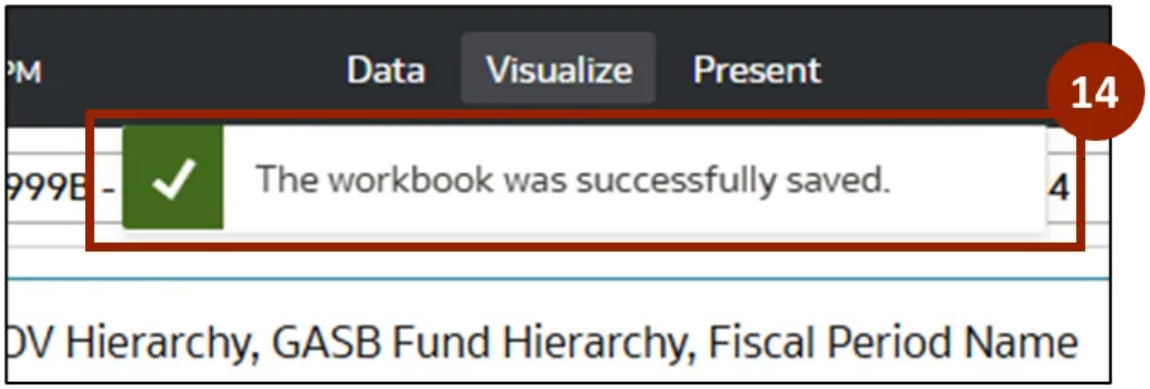
Step 13. Click the **Save** drop-down icon on top right of the screen.

Step 14. A drop-down menu appears. Click **Save**.

Step 15. After saving, “**The workbook was successfully saved**" message appears at the top of the report, confirming that your changes have been successfully saved.

Image





Wrap-Up

OAC users can save and share a report 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 2

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