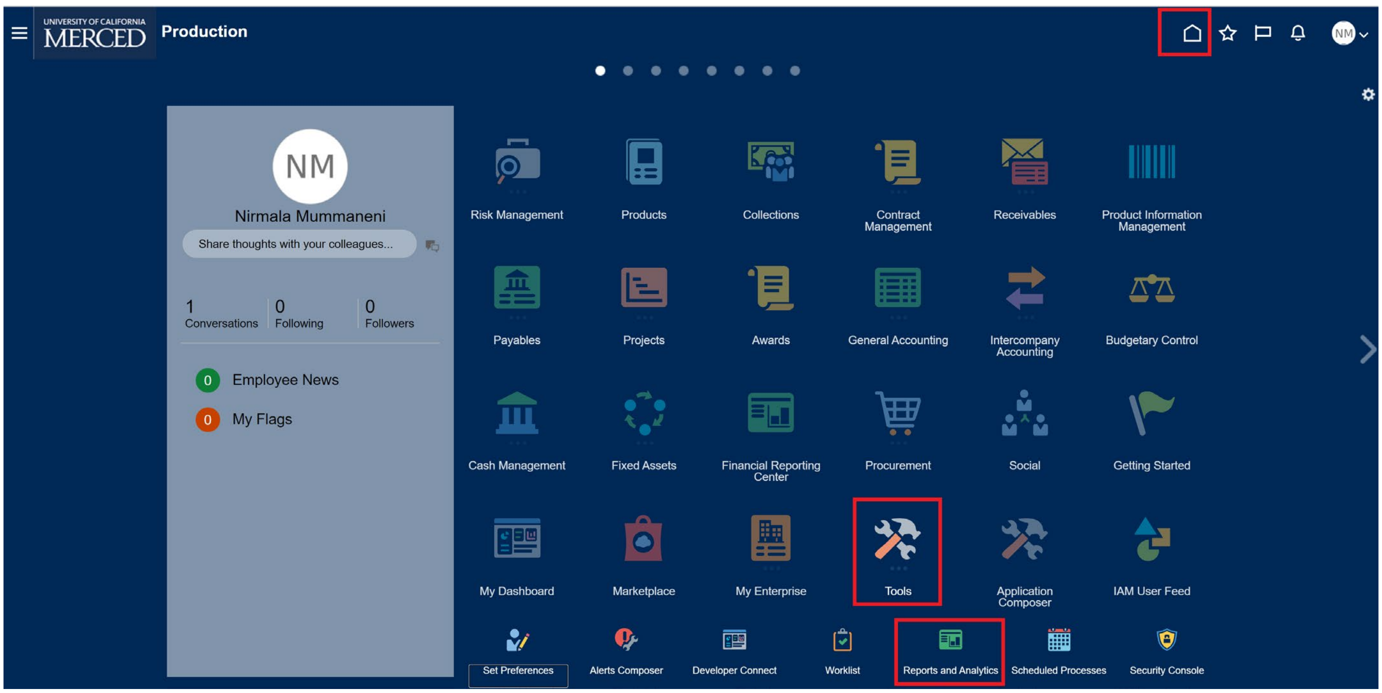
How to Navigate and Run Oracle Reports: a Step-by-Step Guide

Notes:

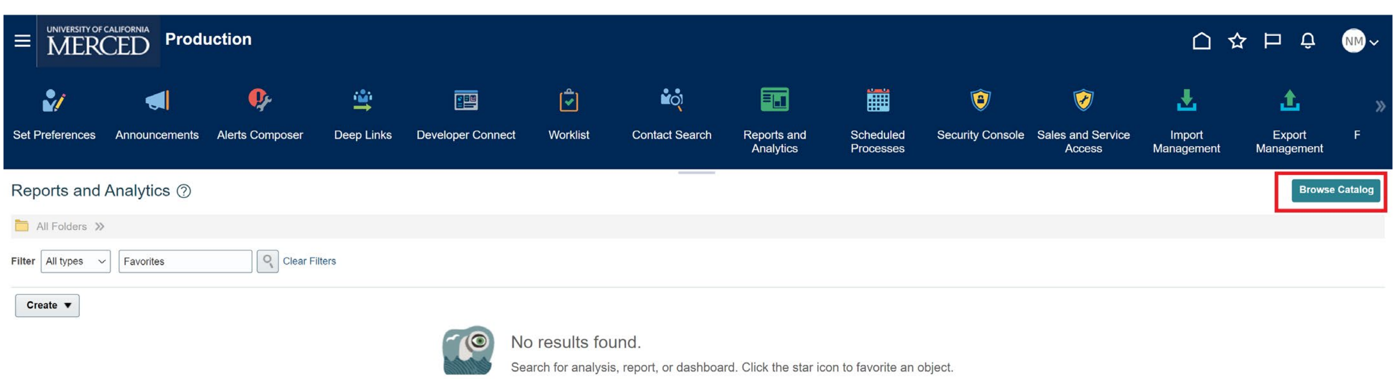
- There are several ways to navigate reports. Here is part of Oracle best practices we are working to adopt.
- Scheduling will help with the timely delivery of reports and enable processing of high-volume or multi-module reports without erroring out. For any reports erroring out (performance issues), please try scheduling instead of running it online.

Navigating Oracle Reports:

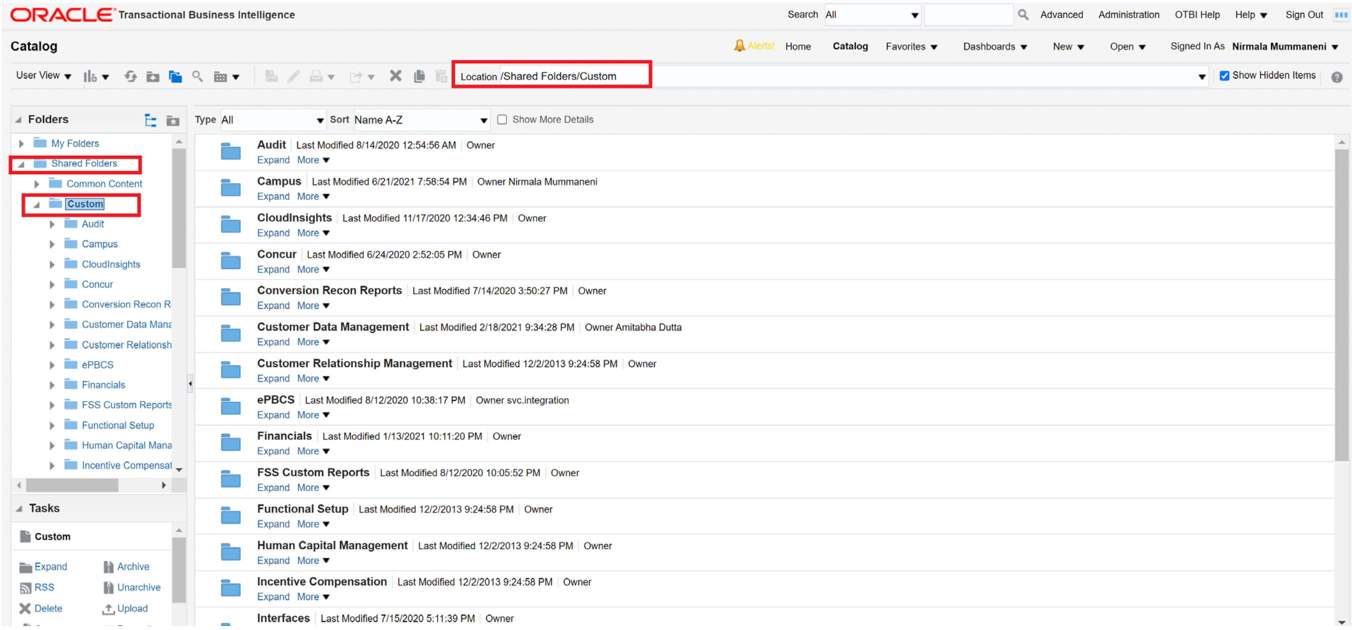
Step 1: Log in to Oracle >> Click on homepage >> Click on Tools to expand >> Select Reports and Analytics



Step 2: Click on Browse Catalog



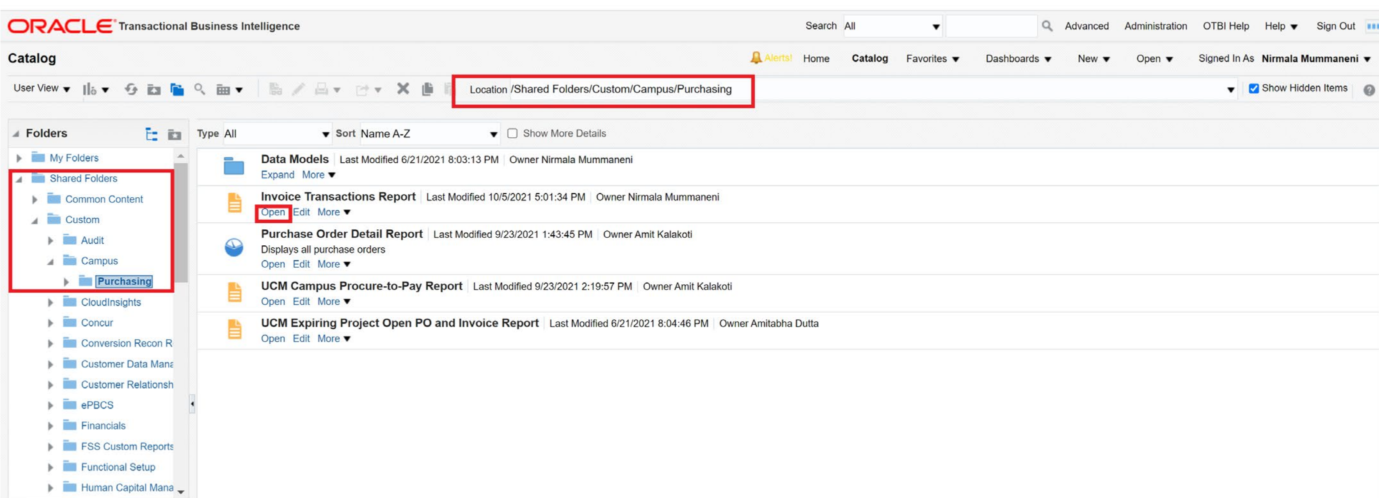
Step 3: On the right-side menu >> Click on Shared Folders >> Custom folder



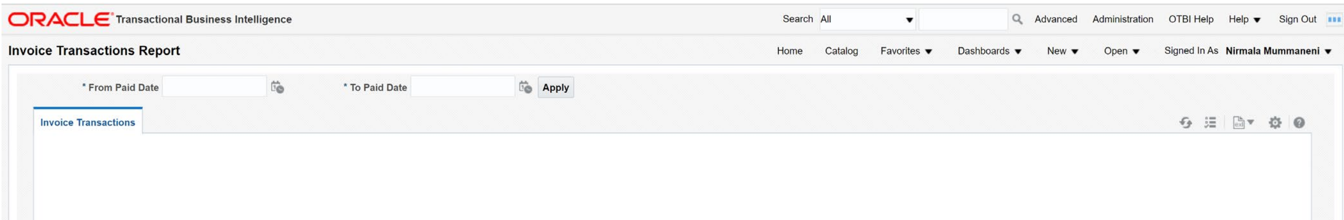
Step 4: Make sure the location is /Shared Folders/Custom >> Click on the desired folder to navigate to report you want.

Running Oracle reports:

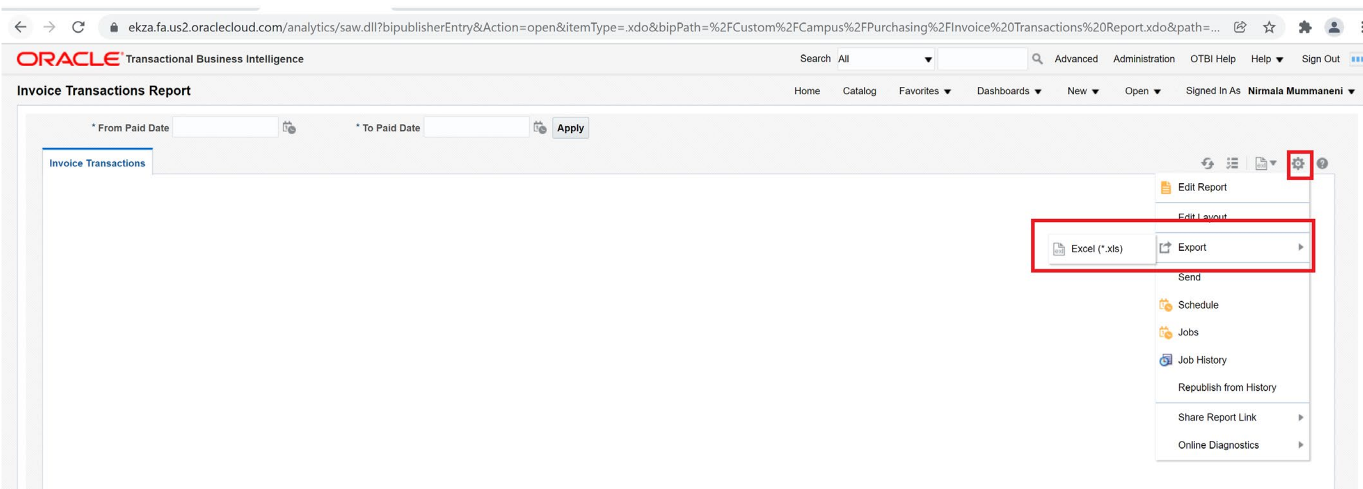
Step 1: Select the report from the correct folder and click Open.



Step 2: Select the parameters and click Apply. * represents mandatory parameters.

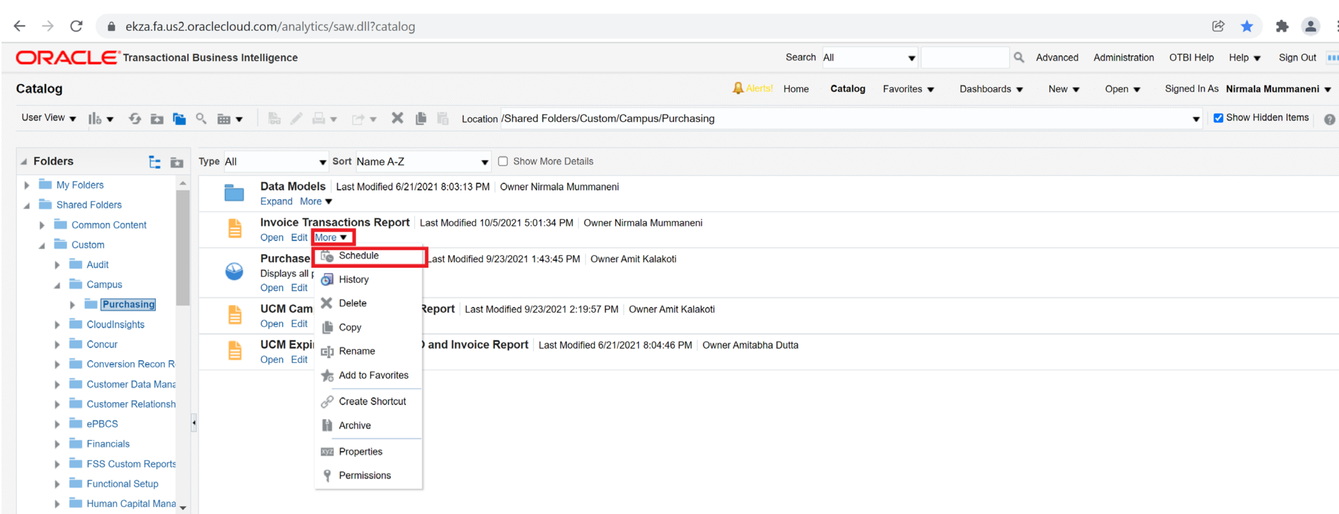


Step 3: To download the report in Excel format, click on gear icon on the right side >> Click on Select export >> Select Excel

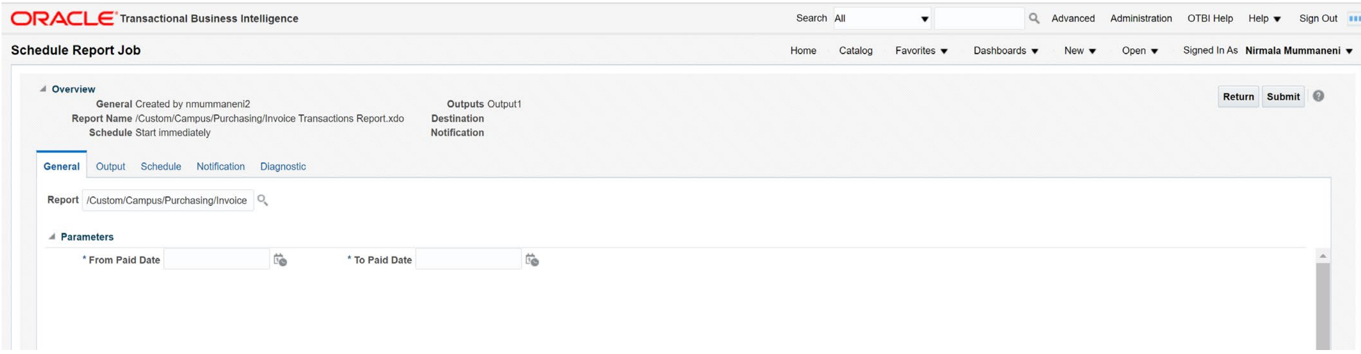


Scheduling Oracle Reports:

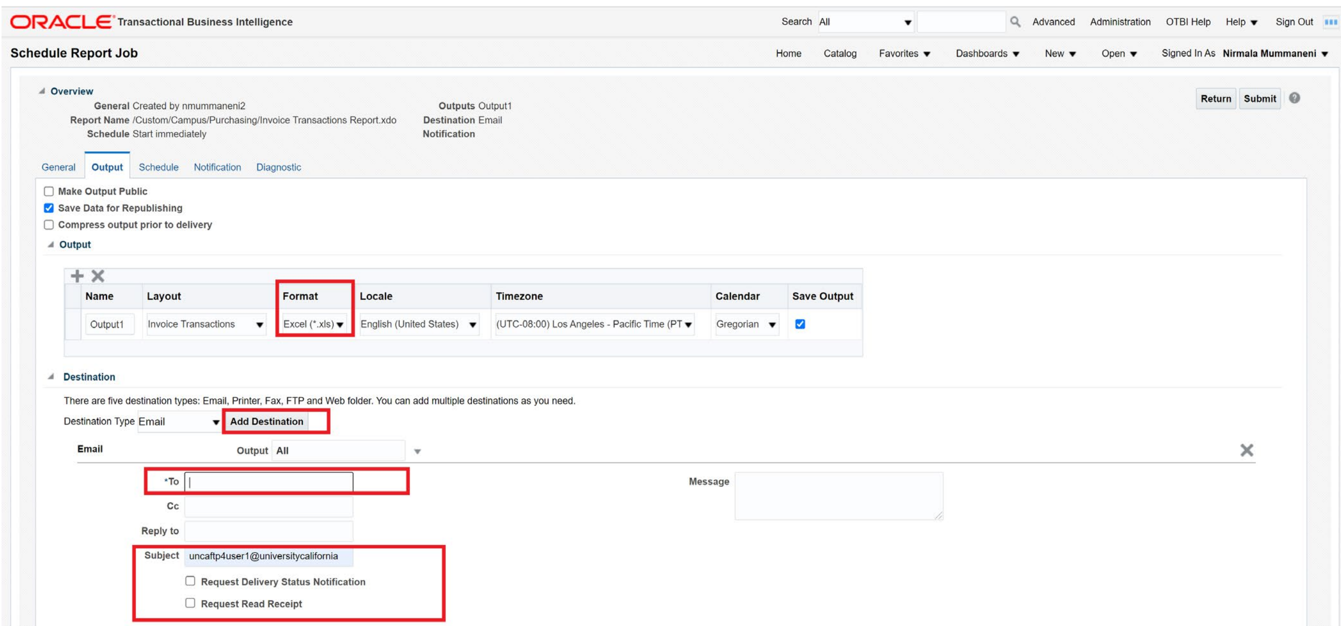
Step 1: Select the report >> Click on More >> Click on Schedule



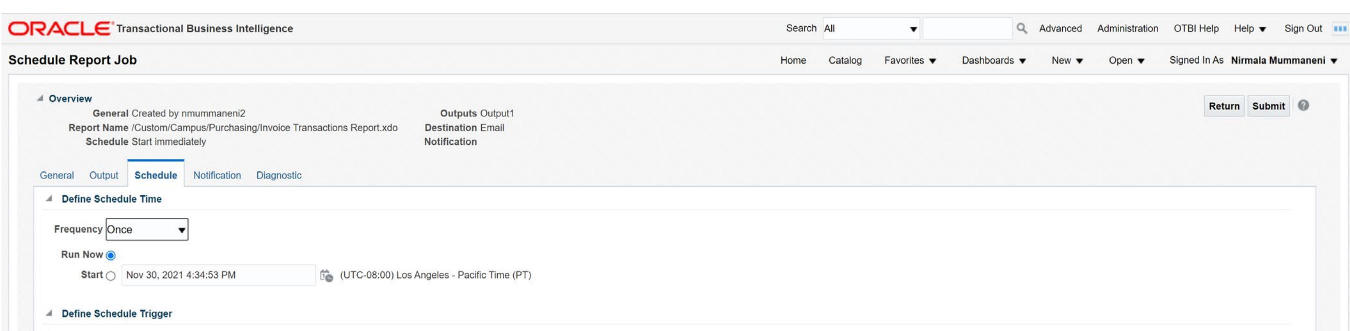
Step 2: General tab >> Select parameters



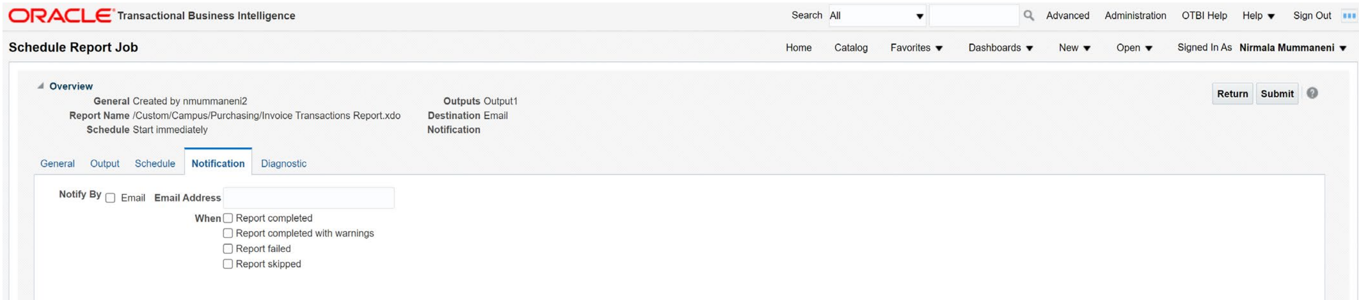
Step 3: Output tab >> Select Format >> Click on Add Destination >> Add email address and subject



Step 4: Schedule Tab >> select schedule (once, daily, weekly, etc.) or select run now if you run ad hoc to receive the output to destined email >> If scheduling, give start and end date (not needed for run now)



Step 5: Select Notify by Email if need to be notified when report is complete/has failed, etc.



Step 6: Click on Submit >> Give a name

You will receive the output to the email provided in the selected format.