

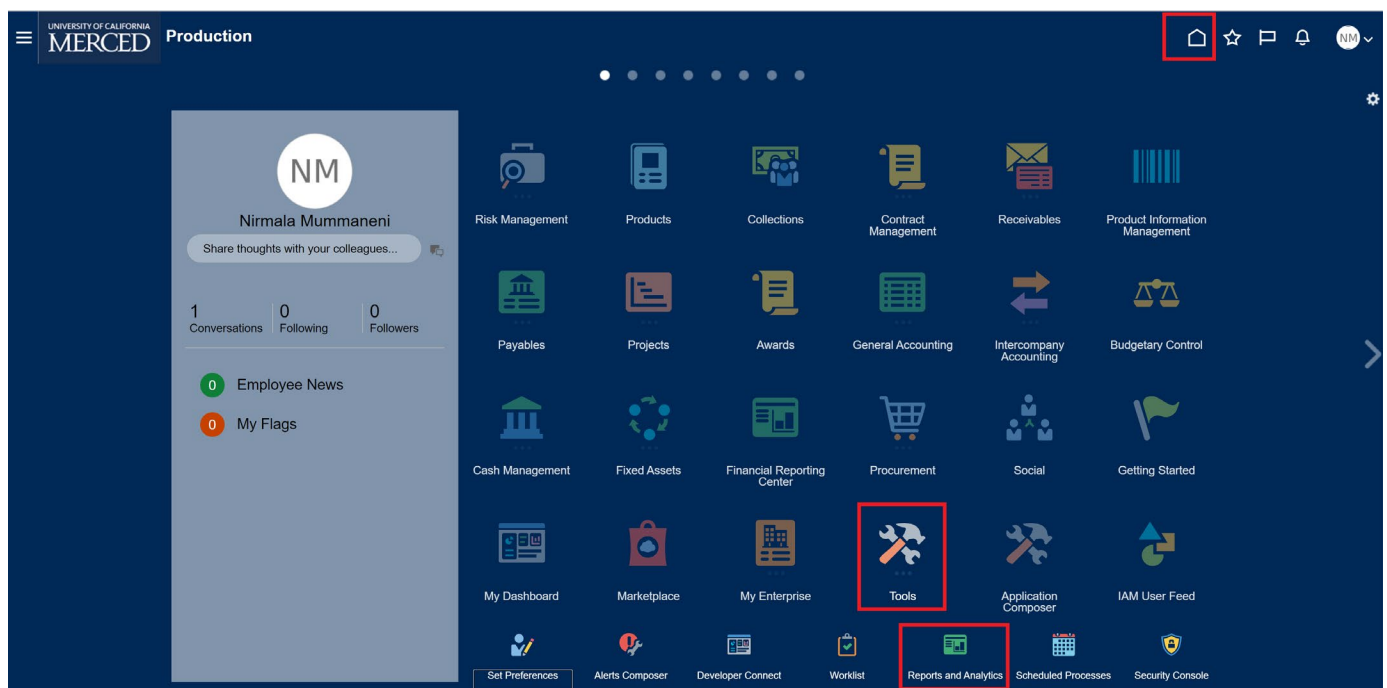
How to Navigate and Run Oracle Reports: a Step-by-Step Guide

Notes:

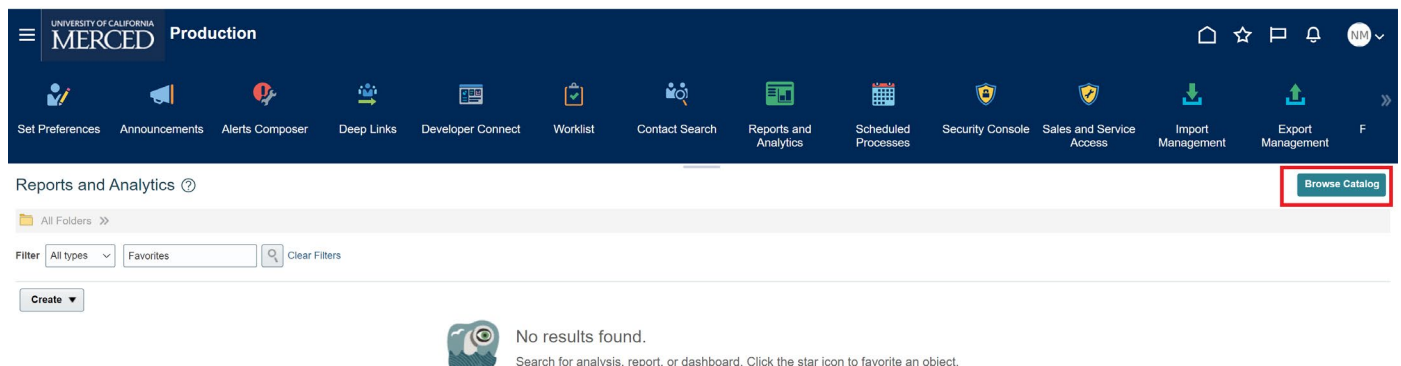
- There are several ways to navigate reports. Here is part of Oracle best practices we are working to adopt.
- Scheduling will help with the timely delivery of reports and enable processing of high-volume or multi-module reports without erroring out. For any reports erroring out (performance issues),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

Navigating Oracle Reports:

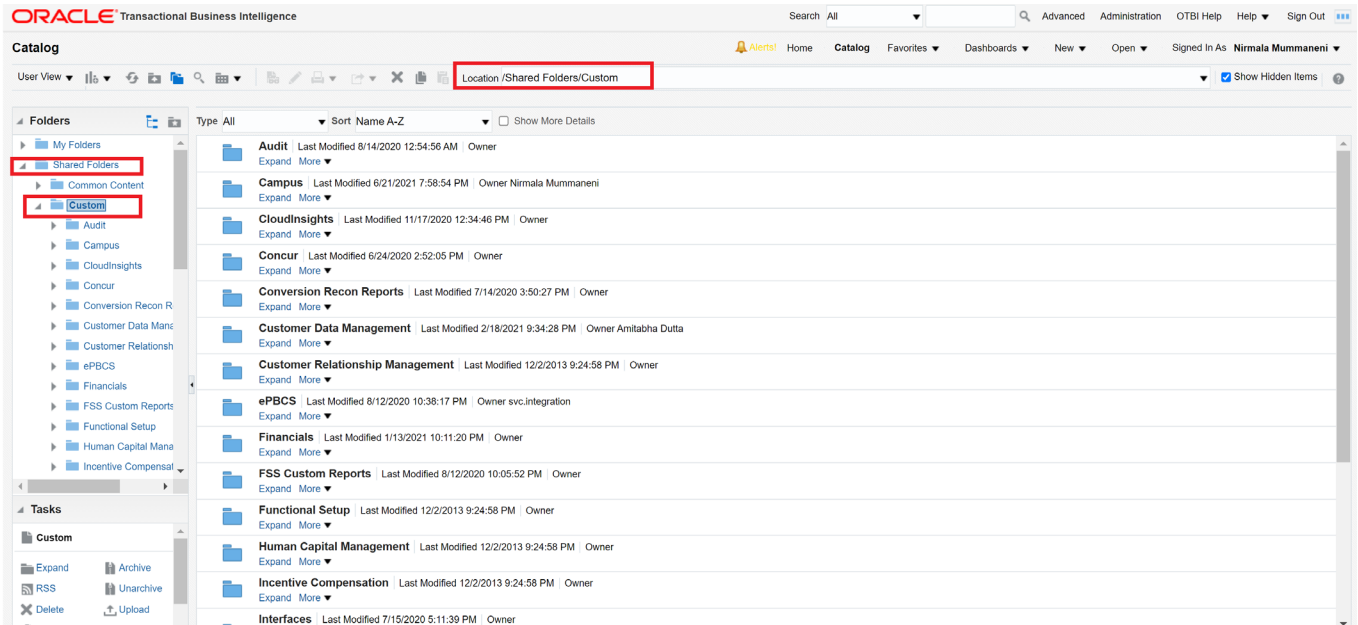
Step 1: Log in to Oracle >> Click on homepage >> Click on Tools to expand >> Select Reports and Analytics



Step 2: Click on Browse Catalog



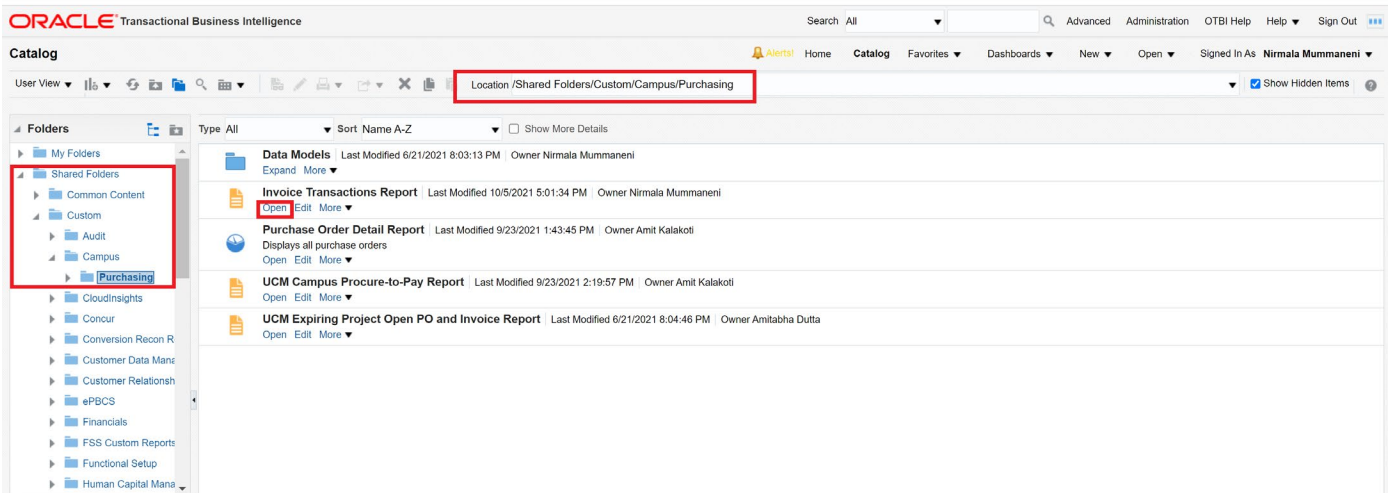
Step 3: On the right-side menu >> Click on Shared Folders >> Custom folder



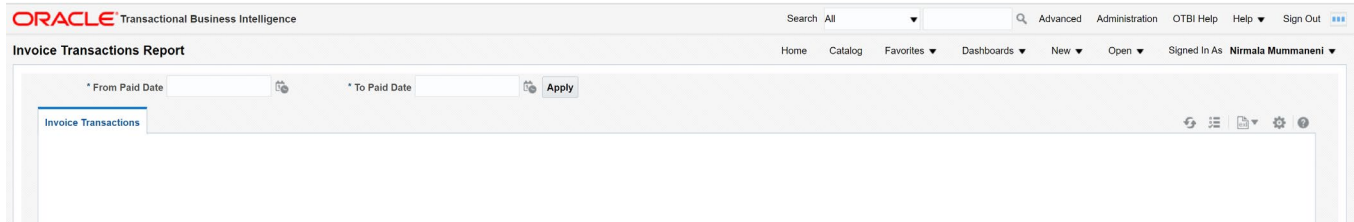
Step 4: Make sure the location is /Shared Folders/Custom >> Click on the desired folder to navigate to report you want.

Running Oracle reports:

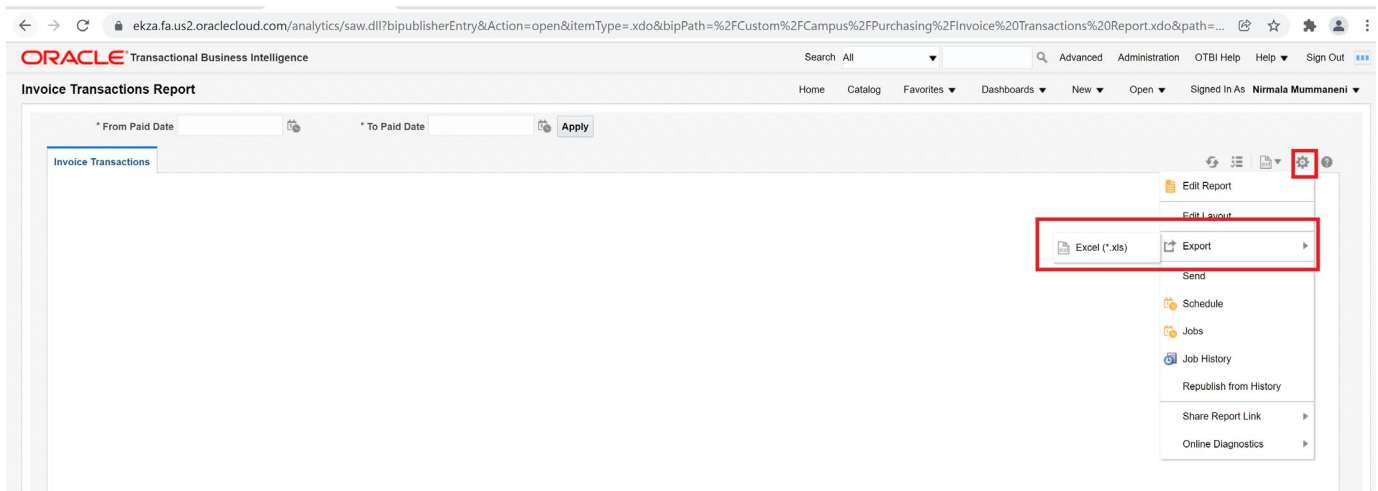
Step 1: Select the report from the correct folder and click Open.



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

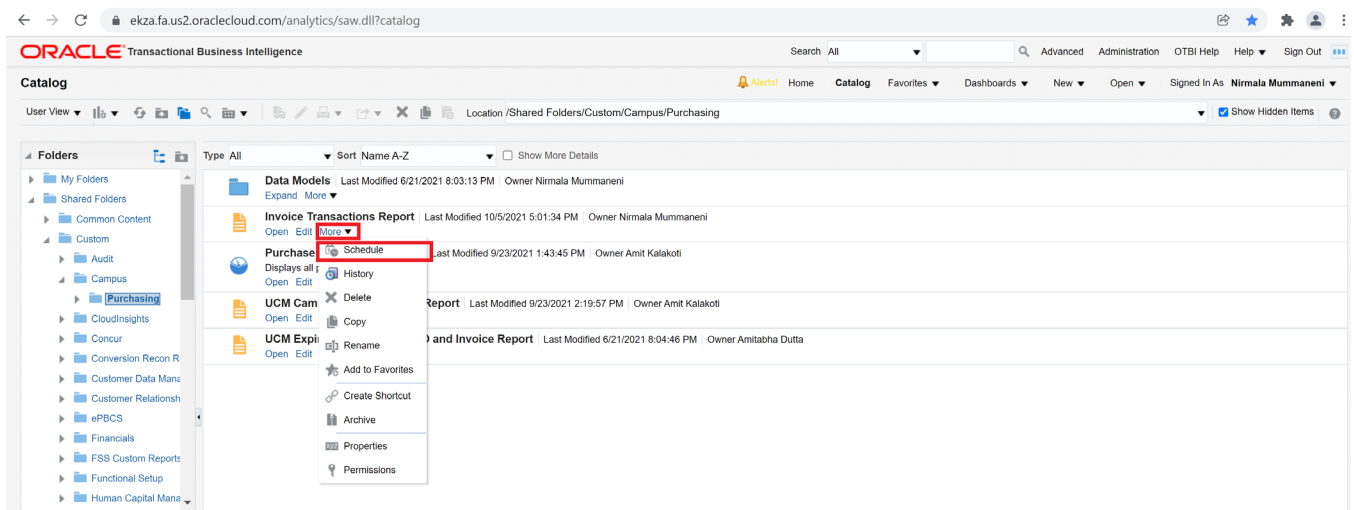


Step 3: To download the report in Excel format, click on gear icon on the right side >> Click on Select export >> Select Excel



Scheduling Oracle Reports:

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



Step 2: General tab >> Select parameters

The screenshot shows the 'Schedule Report Job' page in the Oracle Transactional Business Intelligence interface. The 'General' tab is selected. The report name is '/Custom/Campus/Purchasing/Invoice Transactions Report.xdo'. The schedule is set to 'Start immediately'. The output is 'Output1' with destination 'Email Notification'. The 'Parameters' section shows two date fields: '* From Paid Date' and '* To Paid Date', both with calendar icons.

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

The screenshot shows the 'Output' tab of the 'Schedule Report Job' page. The 'Format' is set to 'Excel (*.xls)'. The 'Destination' section shows 'Email' as the destination type. The 'Add Destination' button is highlighted. The 'Email' form shows the 'To' field with the email address 'uncatp4user1@universitycalifornia', the 'Subject' field with the same email address, and checkboxes for 'Request Delivery Status Notification' and 'Request Read Receipt'.

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)

The screenshot shows the 'Schedule' tab of the 'Schedule Report Job' page. The 'Define Schedule Time' section shows 'Frequency' set to 'Once' and 'Run Now' selected. The 'Start' date is 'Nov 30, 2021 4:34:53 PM'. The 'Define Schedule Trigger' section shows 'Use Trigger' as an option.

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

The screenshot shows the Oracle Transactional Business Intelligence (OTBI) interface for scheduling a report job. The page title is "Schedule Report Job". The top navigation bar includes the Oracle logo, "Transactional Business Intelligence", a search bar, and links for "Advanced", "Administration", "OTBI Help", "Help", and "Sign Out". The main navigation bar includes "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", "Signed In As: Nirmala Mummaneni", and a "Sign Out" button.

The "Overview" section is expanded, showing "General" and "Outputs" tabs. The "General" tab is active, displaying "Created by: nmummaneni2", "Report Name: /Custom/Campus/Purchasing/Invoice Transactions Report.xdo", and "Schedule Start: immediately". The "Outputs" tab shows "Output1" with "Destination Email Notification".

The "Notification" tab is selected, showing the "Notify By" section with a radio button for "Email" and a text field for "Email Address". Below this, the "When" section has a radio button for "Report completed" and a list of checkboxes for "Report completed with warnings", "Report failed", and "Report skipped".

Buttons for "Return" and "Submit" are located in the top right corner of the configuration area.

Step 6: Click on Submit >> Give a name

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