



ADD NOTES TO A WORKBOOK IN OAC DV

OAC

QUICK REFERENCE GUIDE

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to **add notes to a workbook** in Oracle Analytics Cloud (**OAC**) DV.

Introduction and Overview

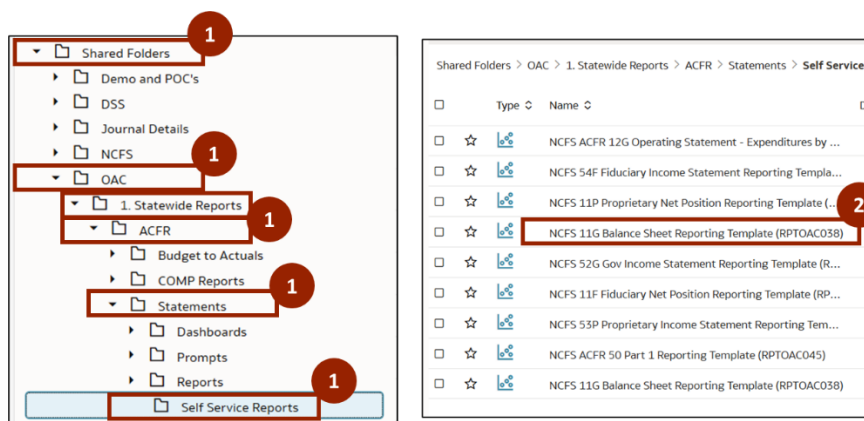
This QRG covers the process of **adding notes to a workbook**. Annotations in OAC let the user highlight key findings by adding notes to dashboards, specific charts, or even single data points. The user can fully customize these notes with fonts, colors, lists, and URL links, making your messages clear and easy for your team to find and use.

Add Note to a Workbook

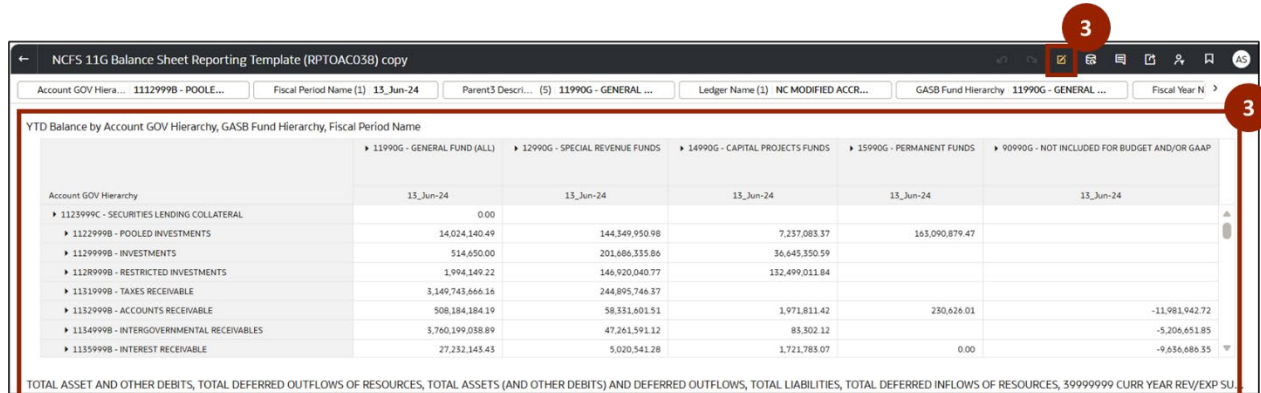
Follow the nine steps to add notes to a workbook:

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 the desired report. In this example, double-click **NCFS 11G - Balance Sheet Reporting Template (RPTOAC038)** report.



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

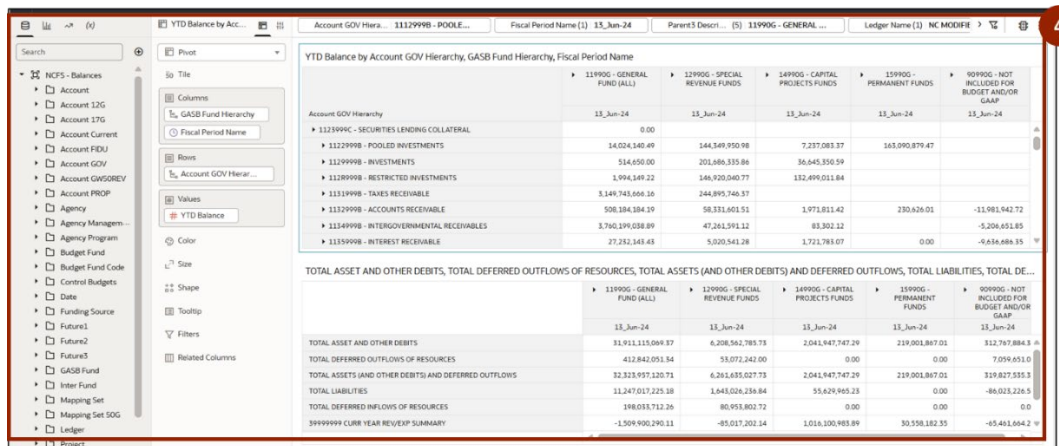


YTD Balance by Account GOV Hierarchy, GASB Fund Hierarchy, Fiscal Period Name

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
1123999C - SECURITIES LENDING COLLATERAL	0.00				
1122999B - POOLED INVESTMENTS	14,024,140.49	144,349,950.98	7,237,083.37	163,090,879.47	
1129999B - INVESTMENTS	514,650.00	201,686,335.86	36,645,350.59		
112R999B - RESTRICTED INVESTMENTS	1,994,149.22	146,920,040.77	132,499,011.84		
1131999B - TAXES RECEIVABLE	3,149,743,666.16	244,895,746.37			
1132999B - ACCOUNTS RECEIVABLE	508,184,184.19	58,331,601.51	1,971,811.42	280,626.01	-11,981,942.72
1134999B - INTERGOVERNMENTAL RECEIVABLES	3,760,199,038.89	47,261,591.12	83,302.12		-5,206,651.85
1135999B - INTEREST RECEIVABLE	27,232,143.43	5,020,541.28	1,721,783.07	0.00	-9,636,686.35

TOTAL ASSET AND OTHER DEBITS, TOTAL DEFERRED OUTFLOWS OF RESOURCES, TOTAL ASSETS (AND OTHER DEBITS) AND DEFERRED OUTFLOWS, TOTAL LIABILITIES, TOTAL DEFERRED INFLOWS OF RESOURCES, 39999999 CURR YEAR REV/EXP SU...

Step 4: The report opens in edit mode.



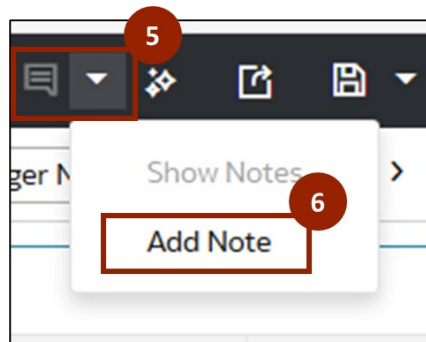
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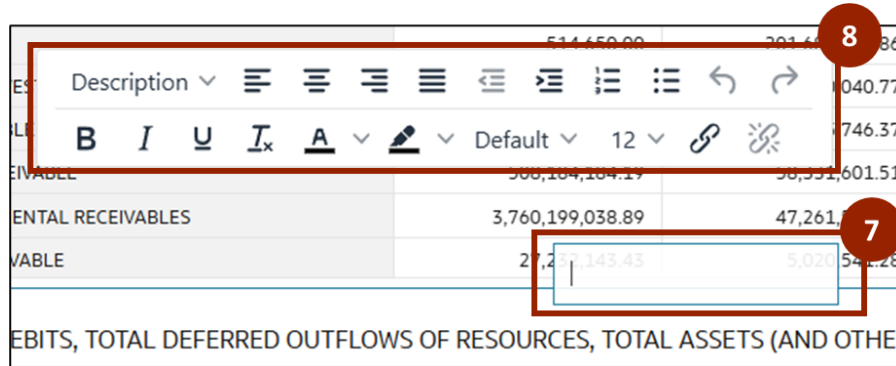
Step 5: To add a note, click the **Notes** icon drop-down.

Step 6: Select **Add Note**.

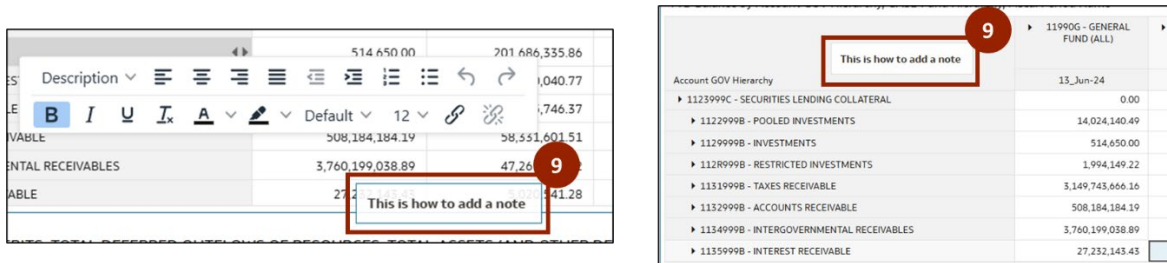


Step 7: A note box appears on the screen. In the note box, enter the note text.

Step 8: You can use the formatting options to specify the note's font style, color, size, and other attributes.



Step 9: Once the note is added, the user can drag it around the screen and place it in the desired part of the workbook.



Wrap-Up

OAC users can **add customizable notes** to a workbook using the steps above, making it easy to highlight insights, provide context, and communicate key information directly on dashboards for the team.

Additional Resources

Virtual Instructor Led Training (vILT)

- OAC for NCFS 2