



# ADDING VISUALIZATION 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 visualization** in the Oracle Analytics Cloud (OAC) DV.

### Introduction and Overview

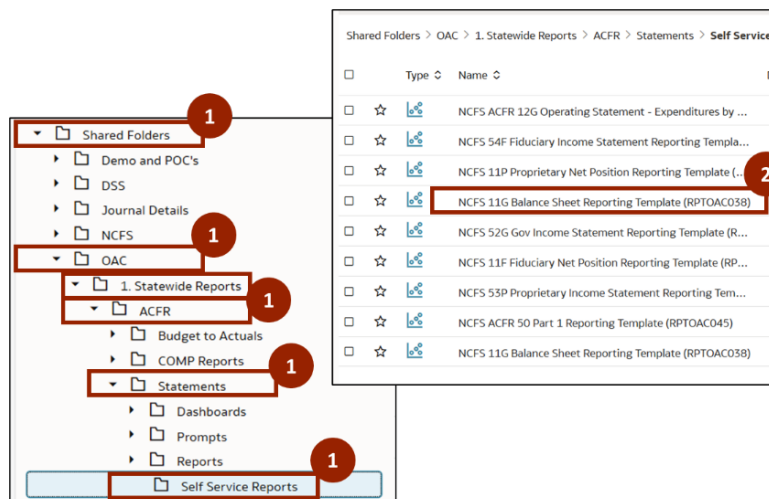
This QRG covers the process of **adding visualization** in OAC DV. Users can quickly create and customize interactive charts, graphs, and dashboards, transforming raw data into clear and actionable visual insights. Following these steps helps users present information more effectively, discover key trends, and drive data-based decisions within their agency or organization.

### Adding Visualization in OAC DV

Follow the seventeen steps to add visualization in OAC DV:

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.



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

Account GOV Hierarchy	13_Jun-24	13_Jun-24	13_Jun-24	13_Jun-24	13_Jun-24
1129999 - 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		
1128999B - RESTRICTED INVESTMENTS	1,994,149.22	146,920,040.77	132,499,011.84		
1131999B - TAXES RECEIVABLE	3,149,743,666.36	244,895,746.37			
1132999B - ACCOUNTS RECEIVABLE	508,184,184.19	58,331,601.51	1,971,811.42	230,626.01	-11,981,942.72
1134999B - INTERGOVERNMENTAL RECEIVABLES	5,760,199,058.89	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	-9,636,886.35

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

Account GOV Hierarchy	13_Jun-24	13_Jun-24	13_Jun-24	13_Jun-24	13_Jun-24
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**Note:** Users can follow the steps in **Manipulating 11G Balance Sheet Report** to perform the analysis in this example, as demonstrated in Course\_vILT\_OAC for NCFS 2\_20251118.

Step 5: Once the analysis is complete, right-click anywhere in the report window.

Step 6: A pop-up menu appears. Select **Edit**.

Step 7: Another menu appears, select **Duplicate Visualization**.

Account GOV Hierarchy	Parent1/Budget Code Description	13_Jun-24
1112999B - POOLED CASH	13000 - OSBM-GOV OFFICE-GENERAL	0.00
	13005 - OFF OF STATE BUDGET AND MANAGE	0.00
	13085 - OSBM-RES FOR GEN ASSEM APPROP	0.00
	23000 - GOVERNOR'S OFFICE-SPECIAL	2,496,757.39
	23001 - GOV OFF-SPEC INTEREST BEARING	108,206.98
	23003 - EDUCATION LOTTERY FUND-OSBM	251,059.88
	23004 - EDUCATION LOTTERY RESERVE - OS	50,762,486.52
	23005 - OSBM-FINES & PENALTIES	51,273,056.41
	23007 - GOVERNORS OFFICE SPECIAL GF	255,338.29
	23009 - OSBM DISASTER RELIEF RESERVE	0.00

Step 8: The duplicate report will be created to the right or below the window.

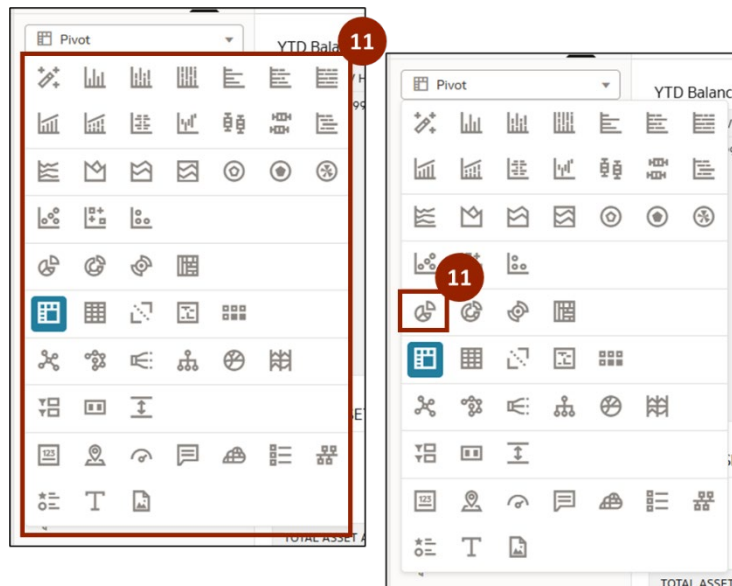
Account GOV Hierarchy	Parent1/Budget Code Description	13_Jun-24
▼ 1112999B - POOLED CASH	13000 - OSBM-GOV. OFFICE-GENERAL	0.00
	13005 - OFF OF STATE BUDGET AND MANAGE	0.00
	13085 - OSBM-RES FOR GEN ASSEM APPROP	0.00
	23000 - GOVERNOR'S OFFICE-SPECIAL	2,496,757.39
	23001 - GOV OFF-SPEC INTEREST BEARING	108,206.98
	23003 - EDUCATION LOTTERY FUND-OSBM	251,059.88
	23004 - EDUCATION LOTTERY RECEIVABLE - NC	50,762,486.52

Step 9: Select the duplicate window.

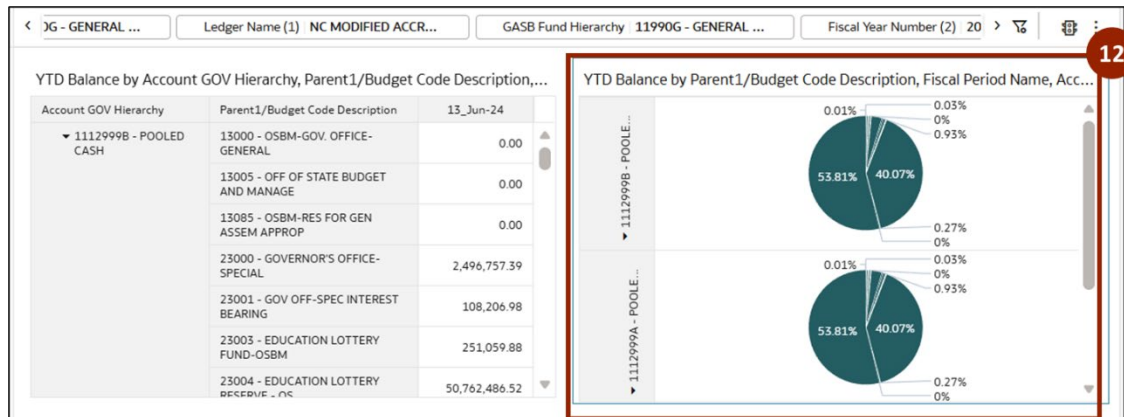
Step 10: Click **Pivot** drop-down menu.

Account GOV Hierarchy	Parent1/Budget Code Description	13_Jun-24
▼ 1112999B - POOLED CASH	13000 - OSBM-GOV. OFFICE-GENERAL	0.00
	13005 - OFF OF STATE BUDGET AND MANAGE	0.00
	13085 - OSBM-RES FOR GEN ASSEM APPROP	0.00
	23000 - GOVERNOR'S OFFICE-SPECIAL	2,496,757.39
	23001 - GOV OFF-SPEC INTEREST BEARING	108,206.98
	23003 - EDUCATION LOTTERY FUND-OSBM	251,059.88
	23004 - EDUCATION LOTTERY RECEIVABLE - NC	50,762,486.52

Step 11: A drop-down menu appears, displaying all available visualization options. The user can select the desired option according to their requirements. To display the data as a pie chart, click the **Pie** icon in this menu.

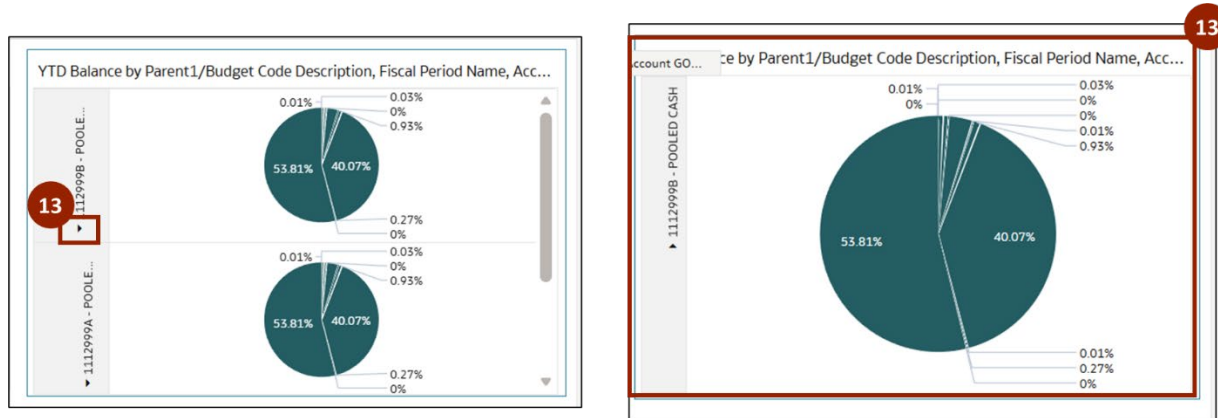


Step 12: A pie chart visualization is now displayed for each Account GOV hierarchy.



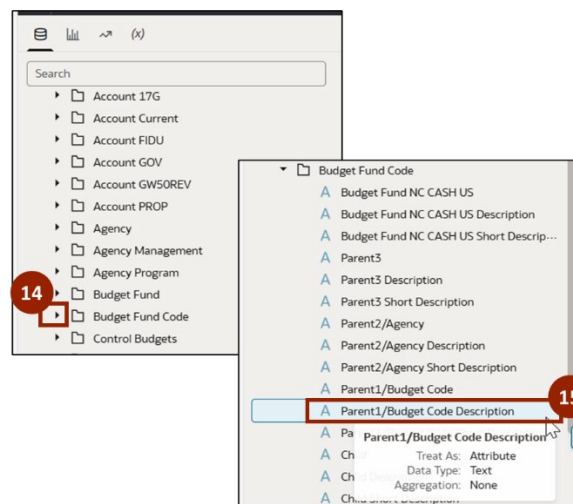
Step 13: To view the pie chart for Pooled Cash, click the **caret** icon next to the hierarchy parent.

This action will close the expanded hierarchy view and display the pie chart for Pooled Cash.

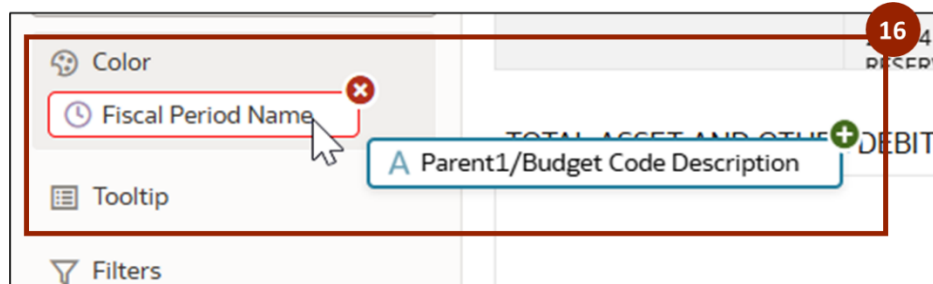


Step 14: Navigate to subject area section, click the **caret** icon next to **Budget Fund Code**.

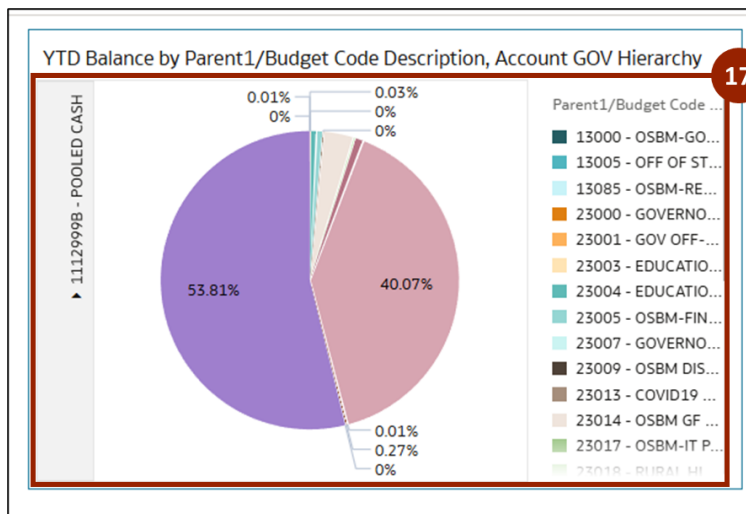
Step 15: Select and hold **Parent1/Budget Code Description**.



Step 16: Drag **Parent1/Budget Code Description** and drop it onto the Color section, replacing the existing color field.



Step 17: The pie chart now displays the budget code distribution for the selected Pooled Cash account hierarchy, along with a budget code legend for reference.



**Note:** The user can adjust the filters available at the top of the report as needed to update the visualization accordingly.

## Wrap-Up

NCFS users can **add visualization** using the steps above. By following these steps, users can turn raw data into interactive visualizations—such as pie charts and bar graphs—that deliver actionable insights.

## Additional Resources

### Virtual Instructor Led Training (vILT)

- OAC for NCFS 2