OAC-10 Add Notes to a Workbook in OAC DV

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.

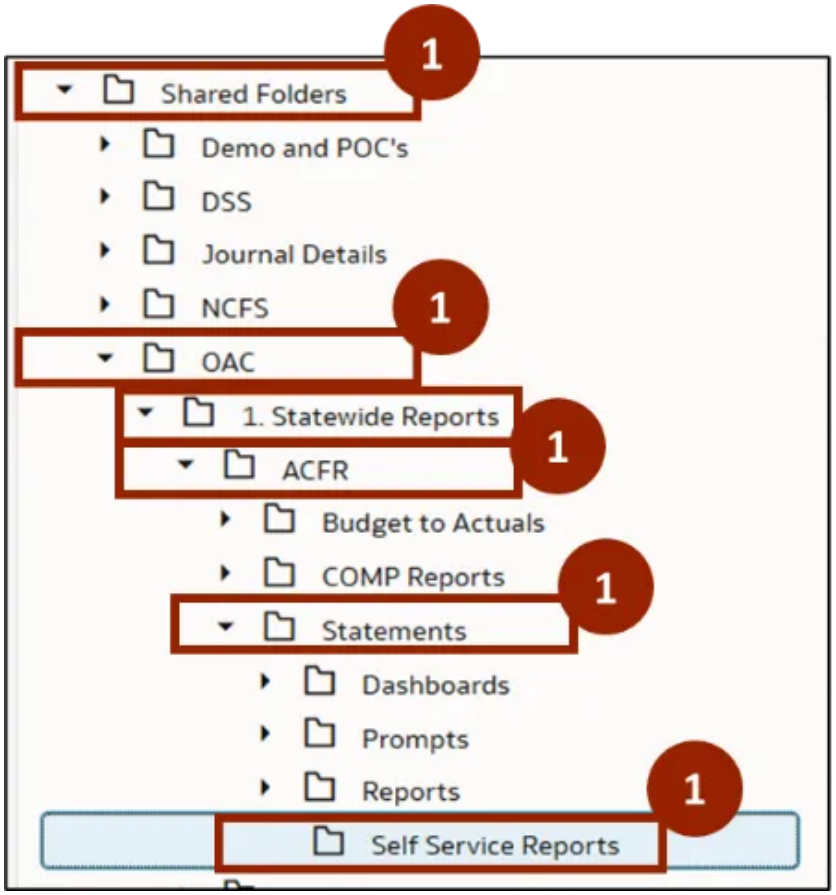
Add Note to a Workbook

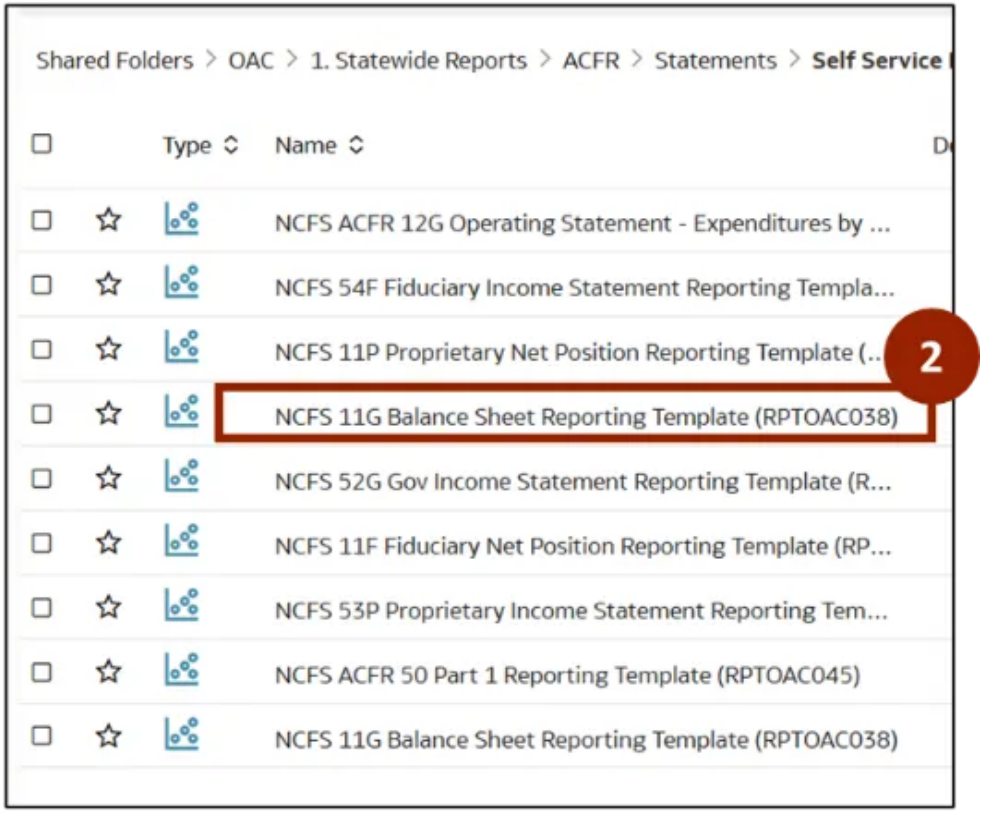
Follow the below steps to add notes to a workbook. There are 9 steps to complete this process.

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

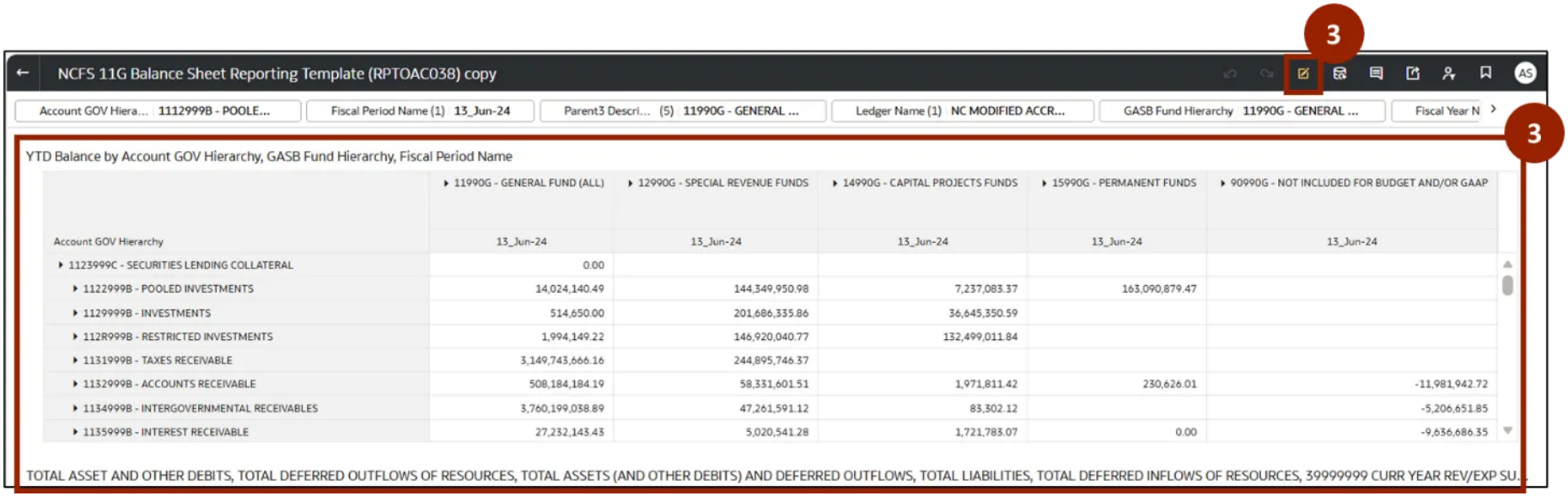
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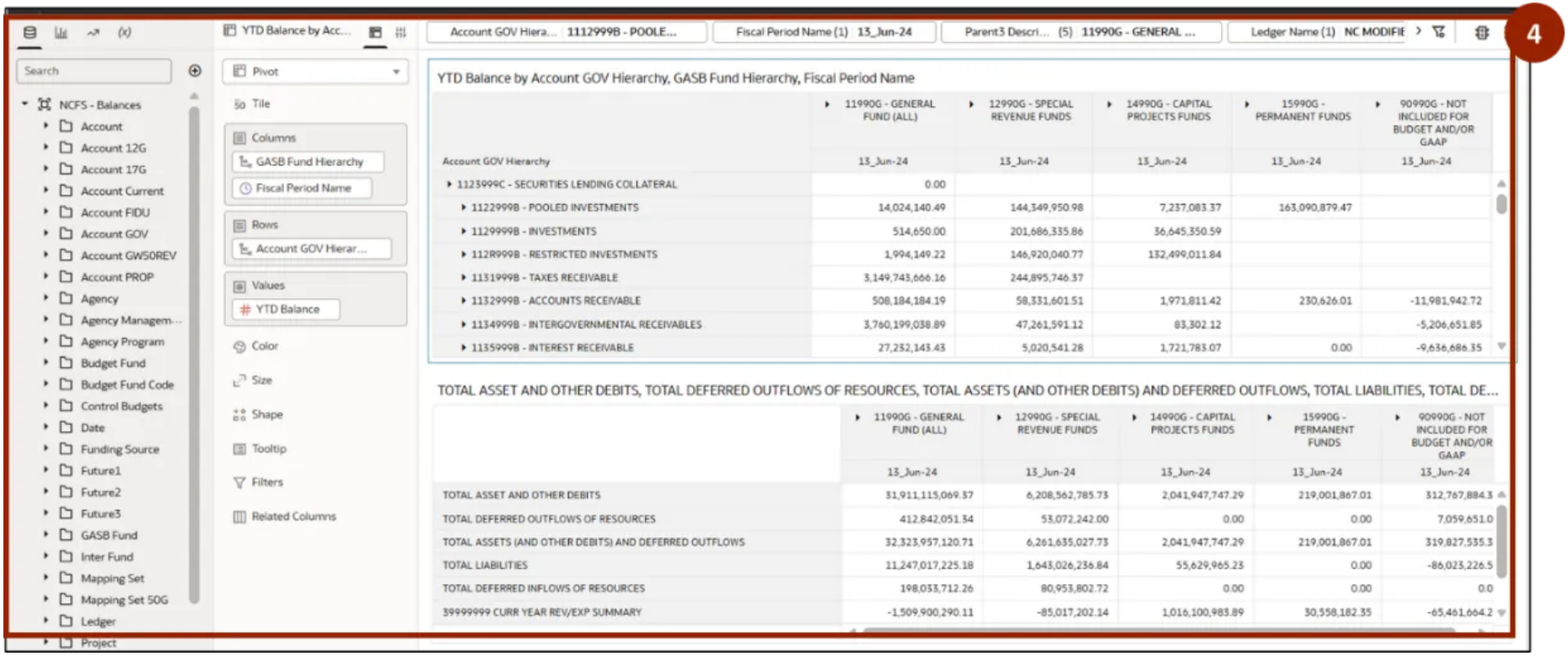
Step 3. Once the report is open, click the **Edit** icon.

Image



Step 4. The report opens in edit mode.

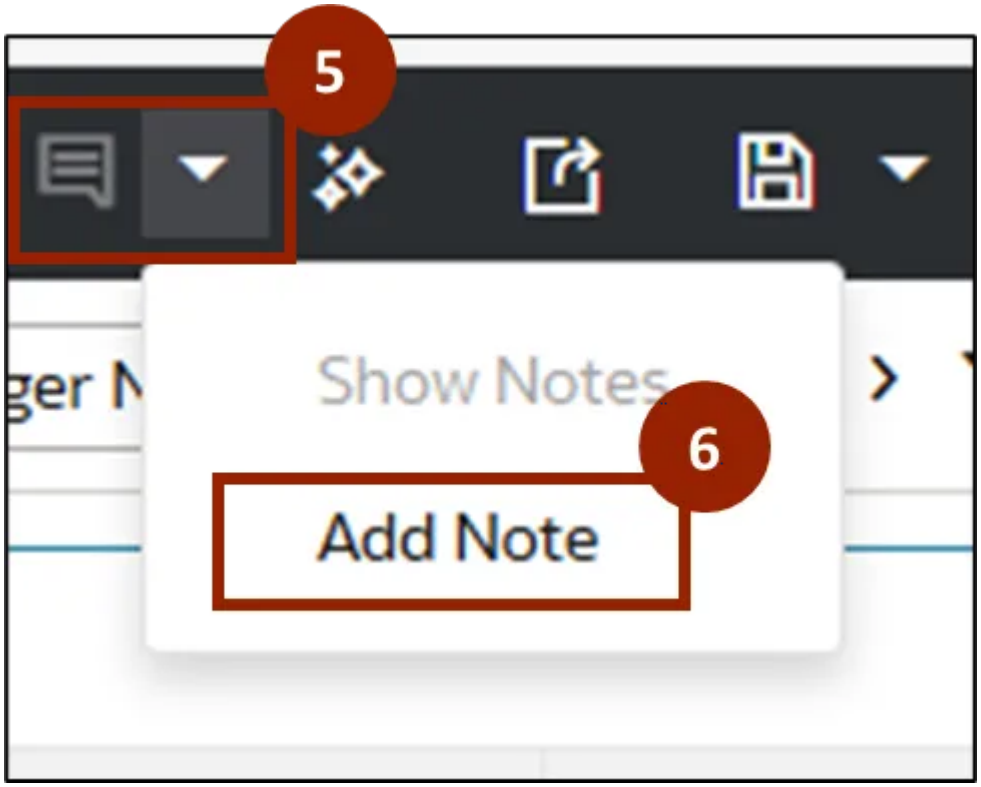
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Step 5. To add a note, click the **Notes** icon drop-down.

Step 6. Select **Add Note**.

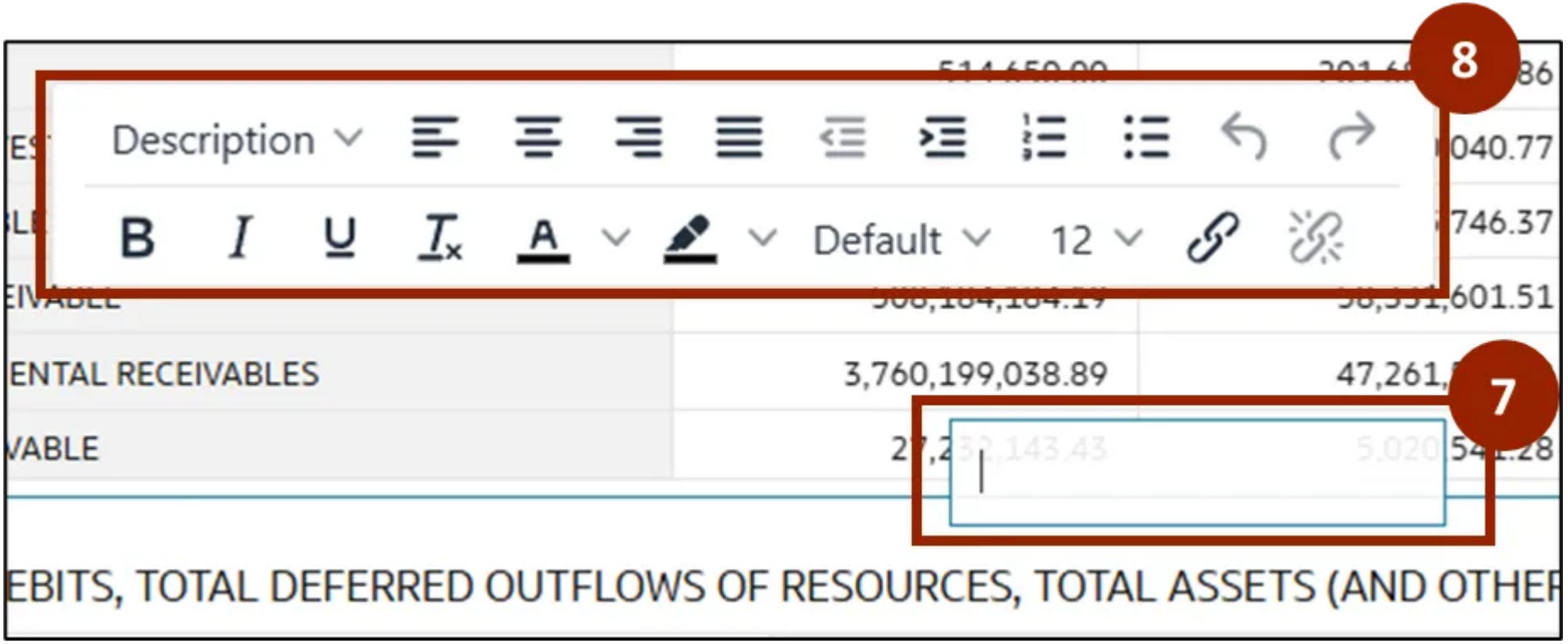
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Step 7. A note box appears on the screen. In the note box, enter the note text.

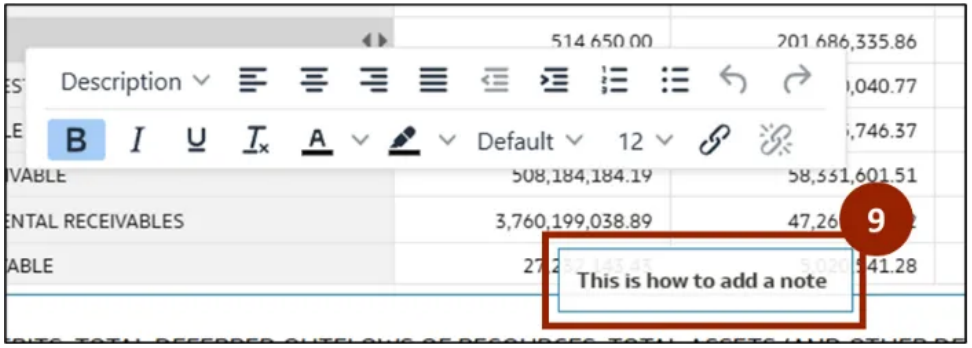
Step 8. You can use the formatting options to specify the note's font style, color, size, and other attributes.

Image



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.

Image





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

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