OAC-13 Adding Visualization in OAC DV

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.

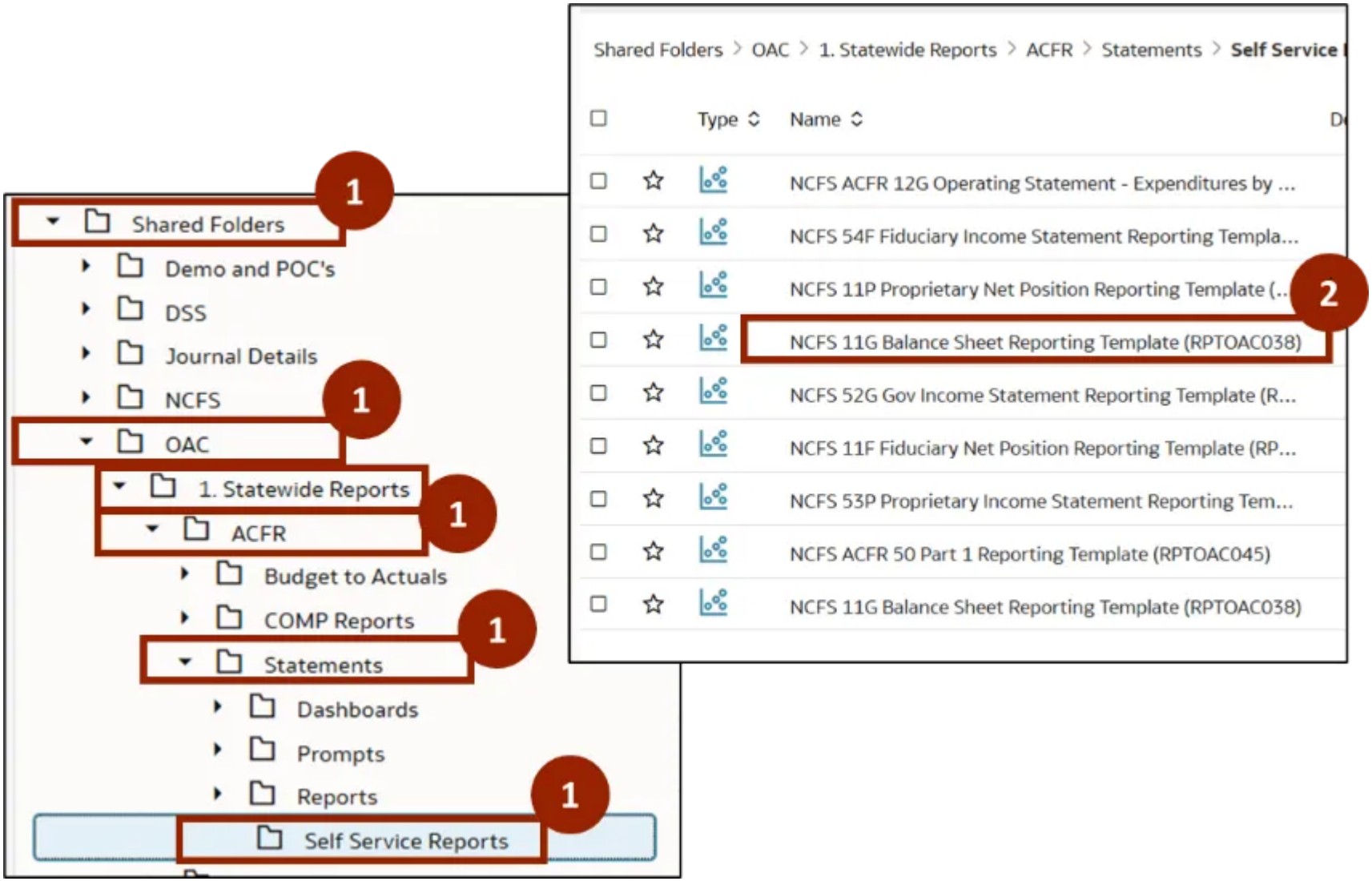
Adding Visualization in OAC DV

Follow the below steps to add visualization in OAC DV. There are 17 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**.

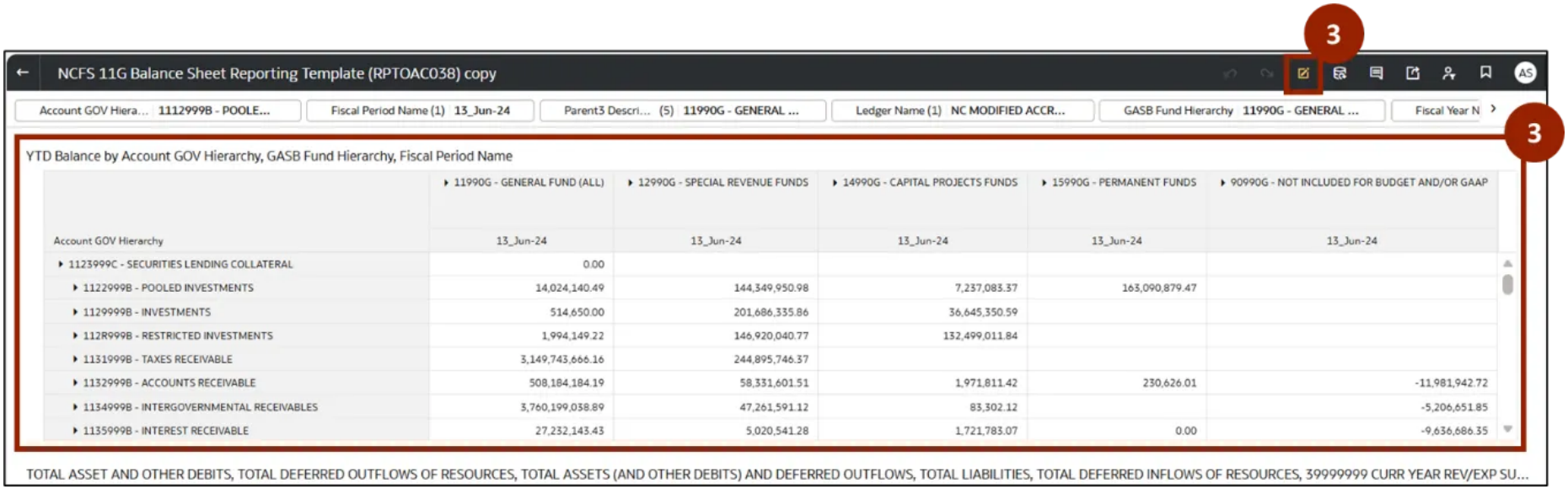
Step 2. A list of DV templates is displayed within the selected report type. Double-click **NCFS 11G - Balance Sheet Reporting Template (RPTOAC038)** report.

Image



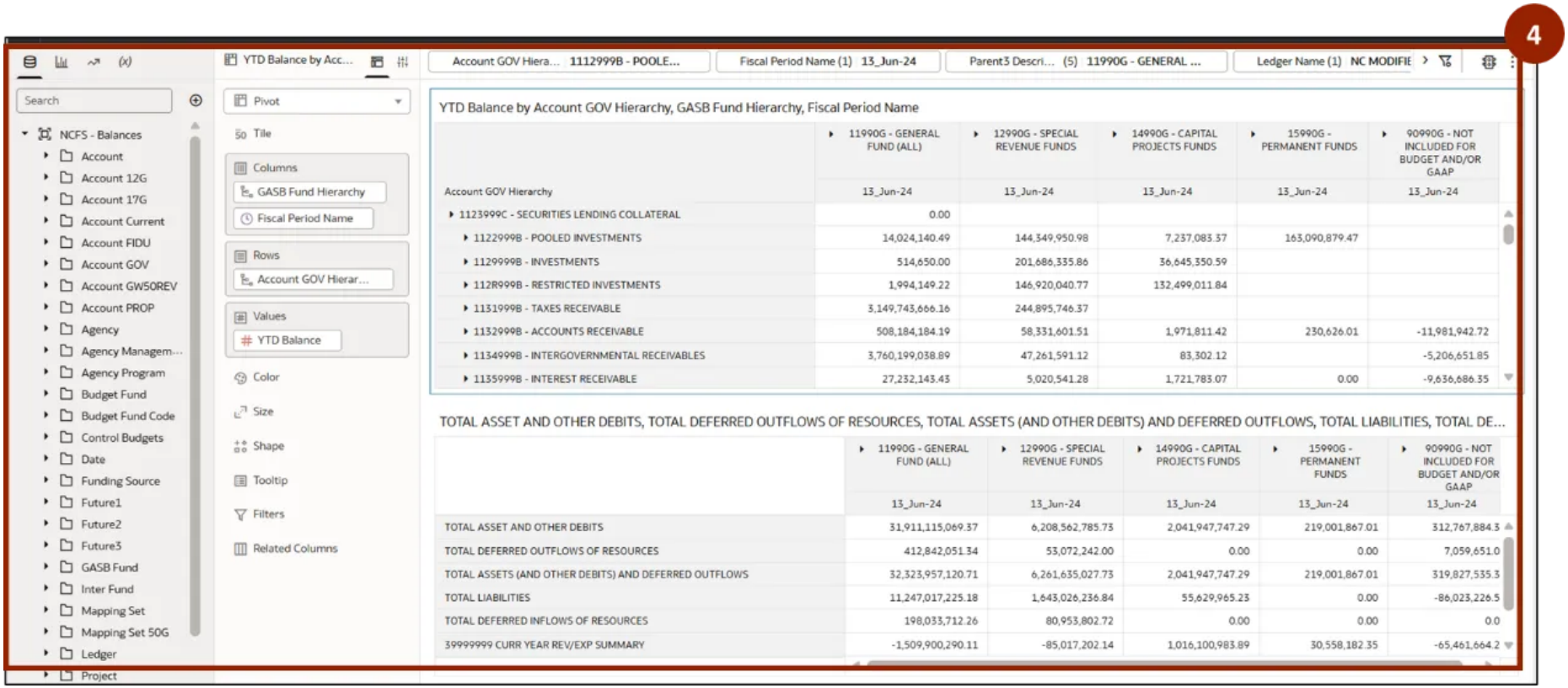
Step 3. Once the report is open, click the **Edit** icon.

Image



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

Image



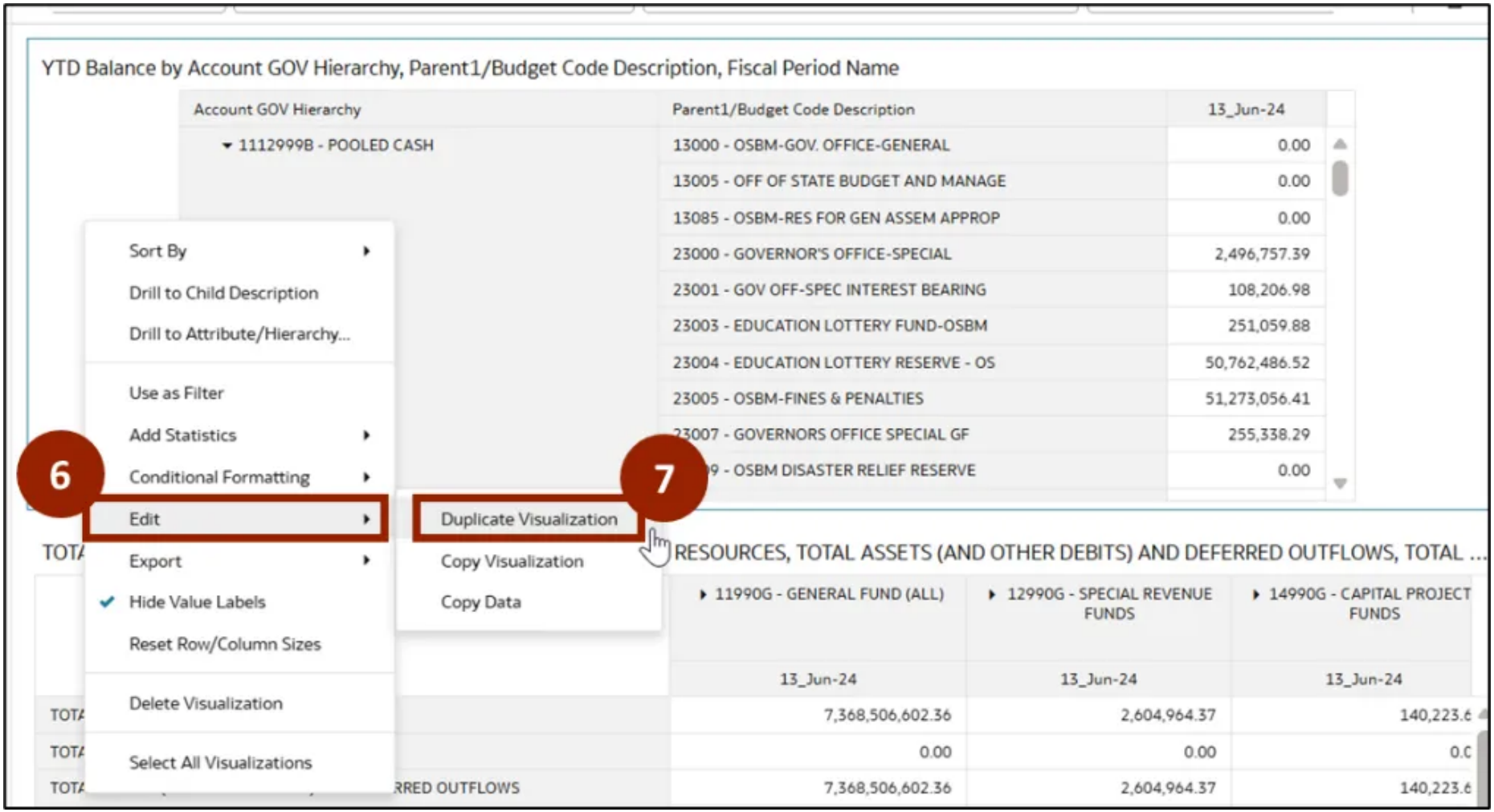
Note: Users can follow the steps in **Manipulating 11G Balance Sheet Report** to perform the analysis in this example, as demonstrated in Course_vILT_OAC for NCFS 2_20251118.

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

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

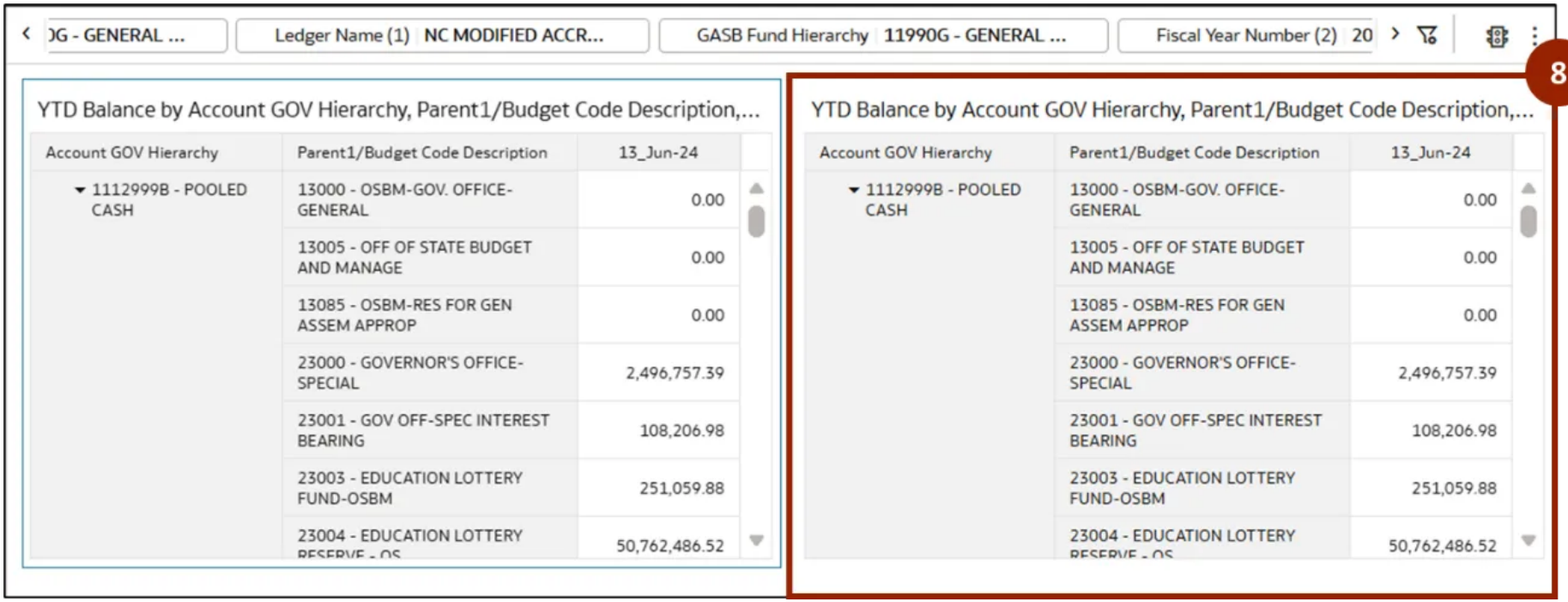
Step 7. Another menu appears, select **Duplicate Visualization**.

Image



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

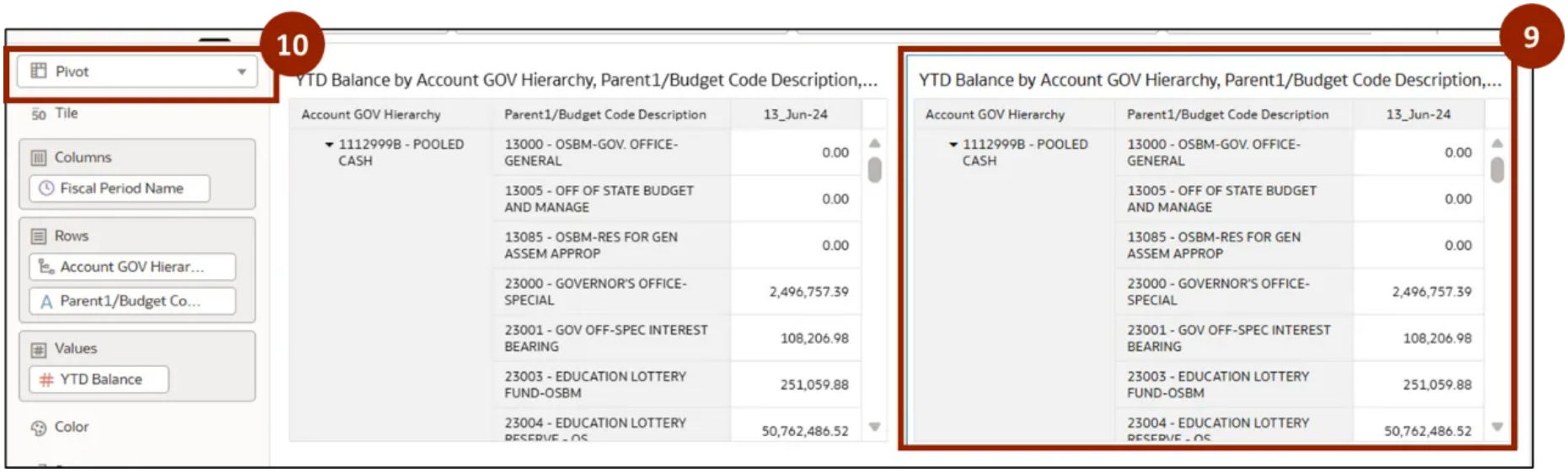
Image



Step 9. Select the duplicate window.

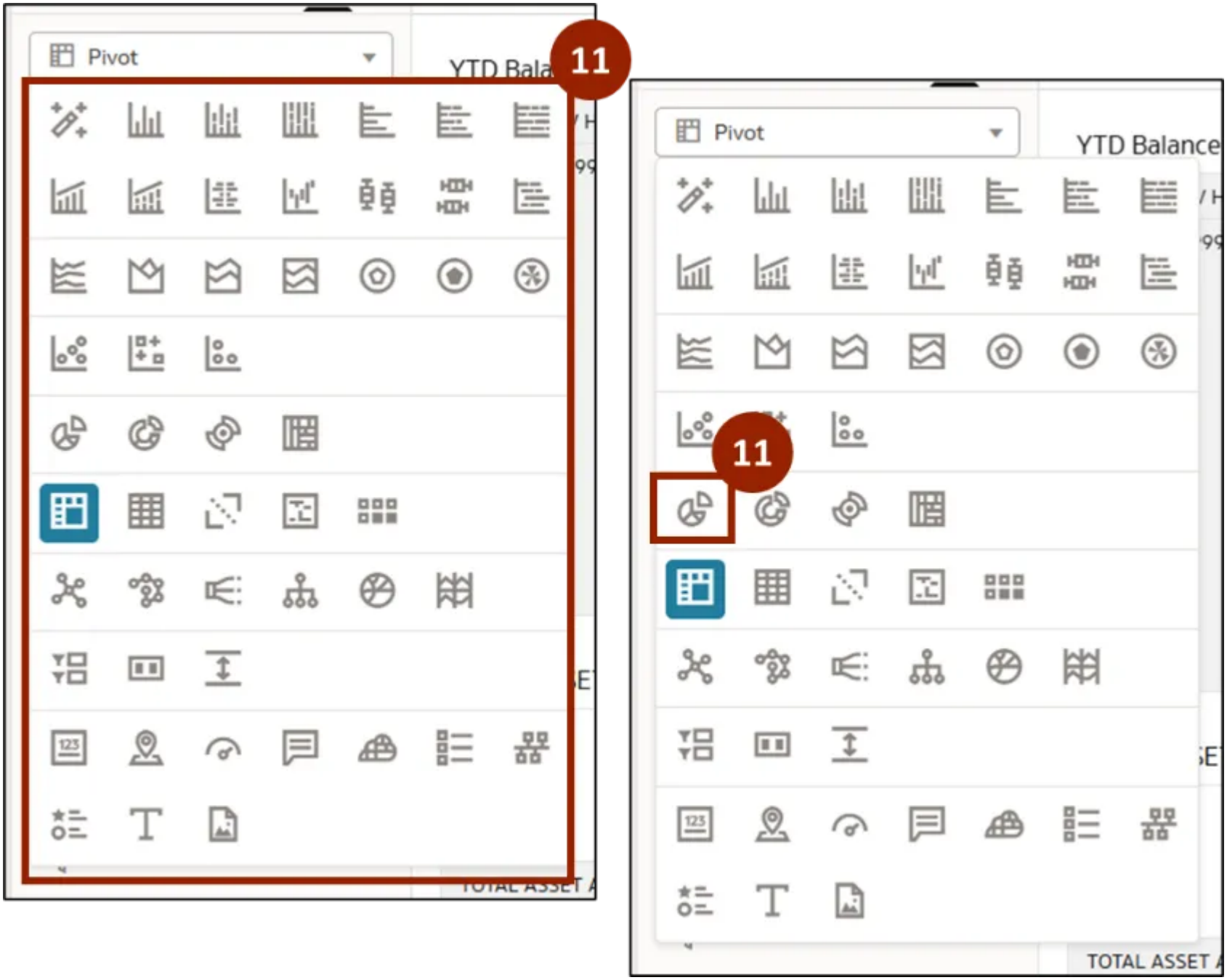
Step 10. Click **Pivot** drop-down menu.

Image



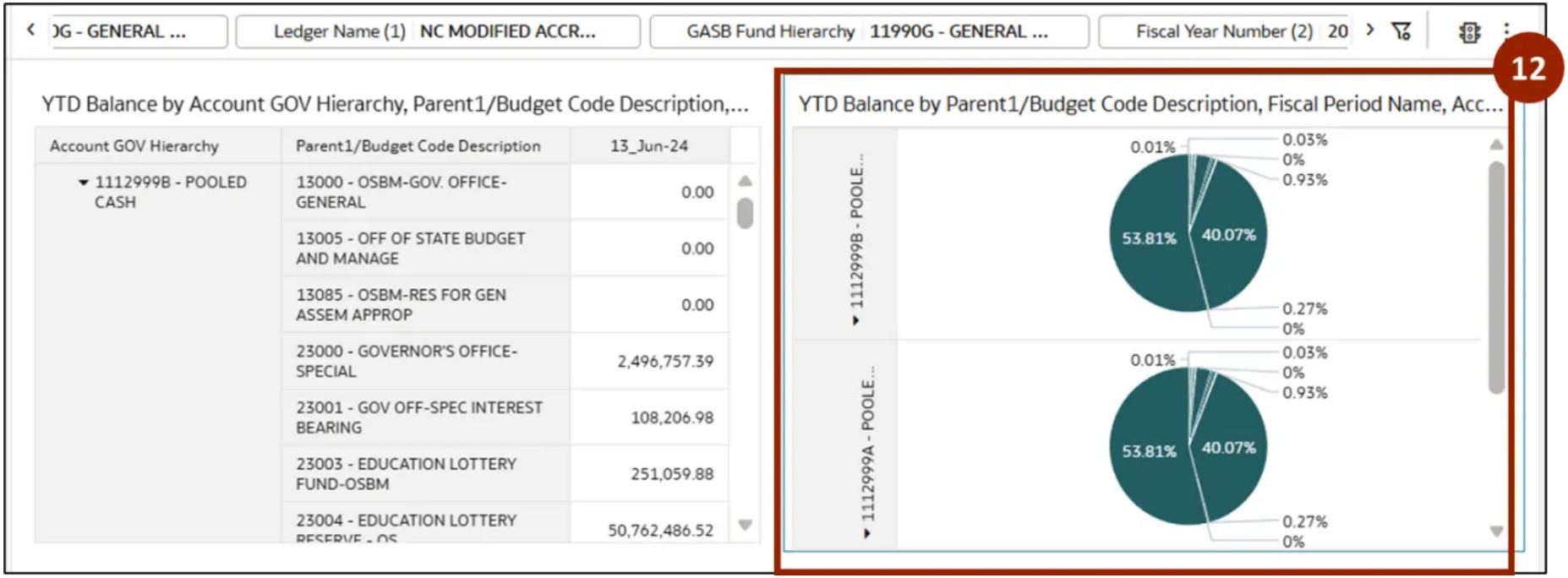
Step 11. A drop-down menu appears, displaying all available visualization options. The user can select the desired option according to their requirements. To display the data as a pie chart, click the **Pie** icon in this menu.

Image


Pivot
11
YTD Balance
TOTAL ASSET
Pivot
11
YTD Balance
TOTAL ASSET

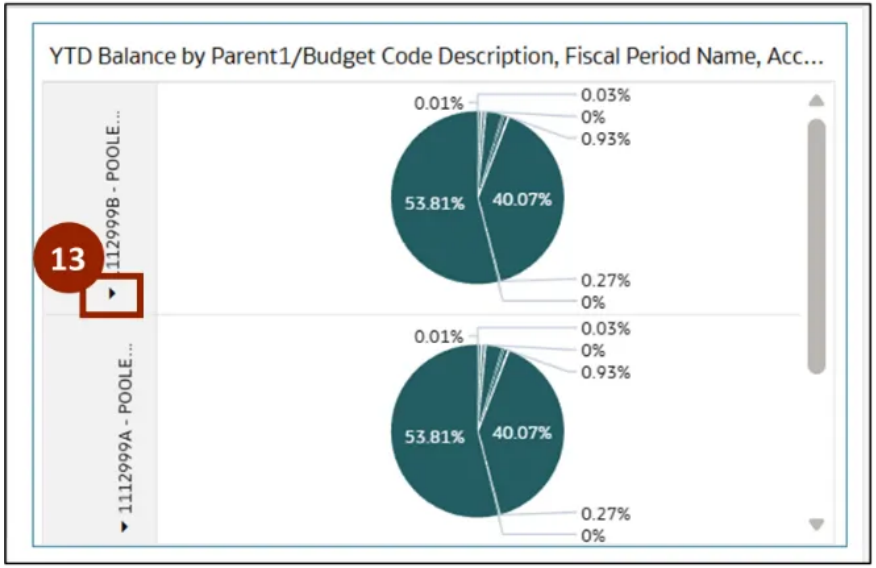
Step 12. A pie chart visualization is now displayed for each Account GOV hierarchy.

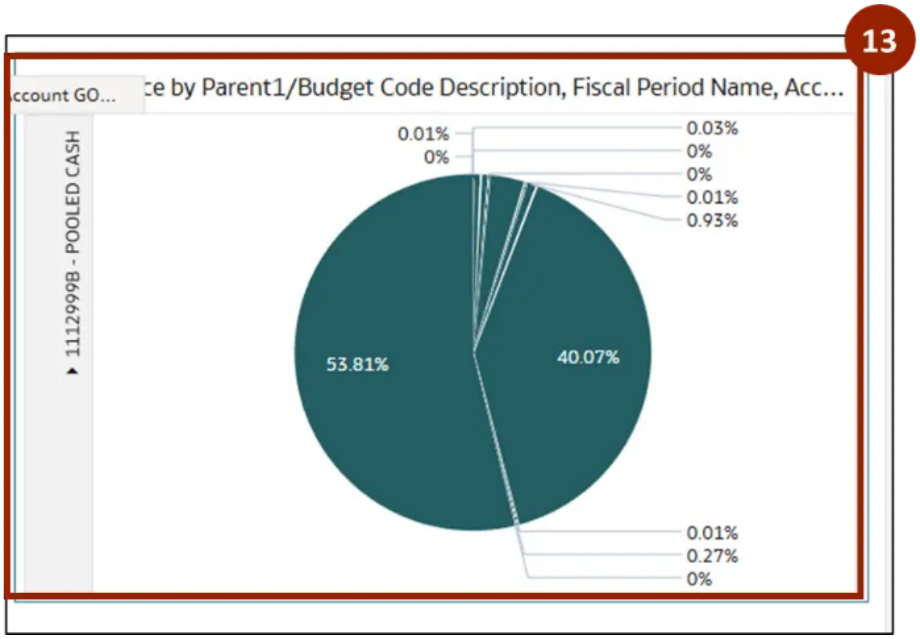
Image



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.

Image

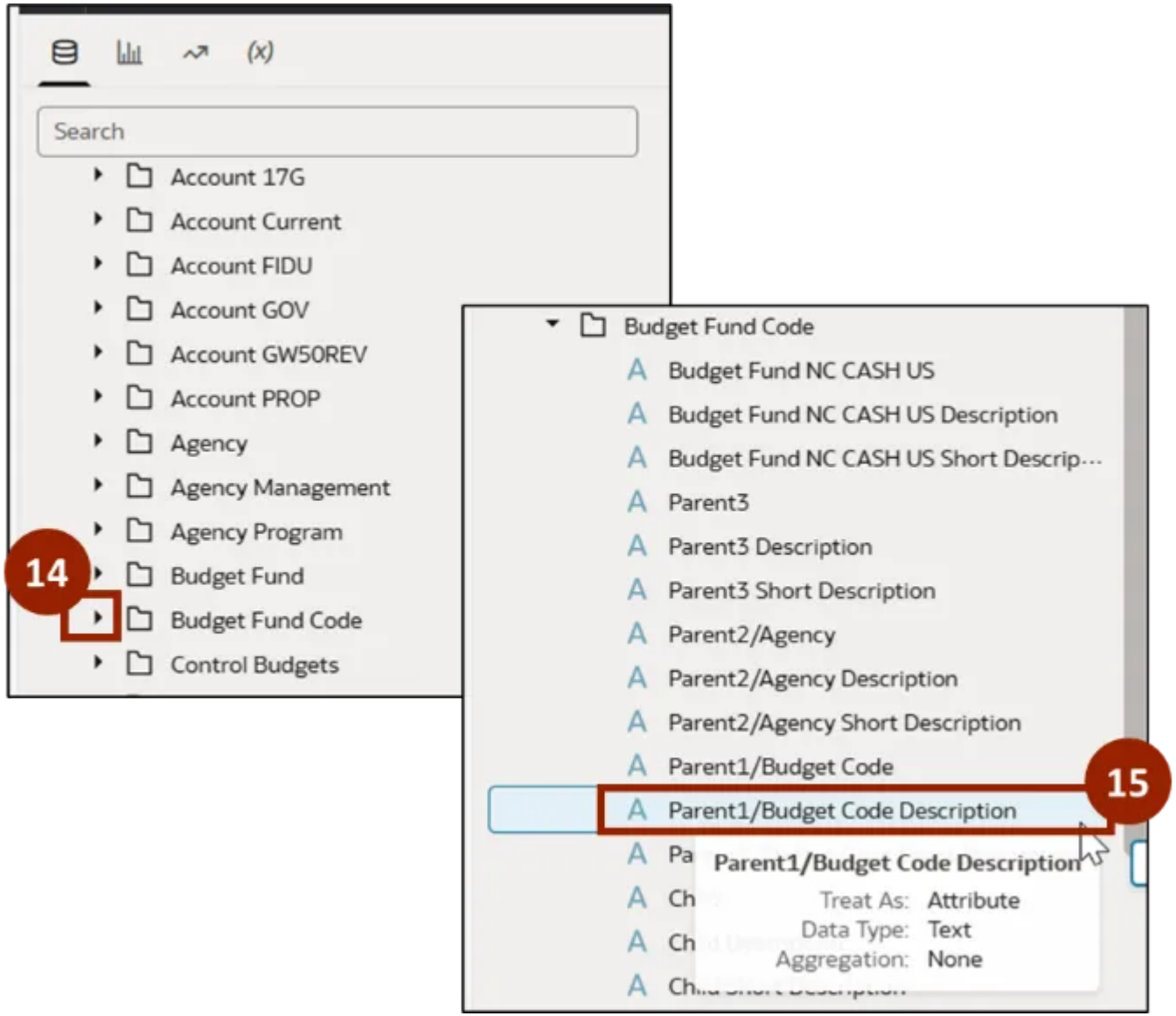




Step 14. Navigate to subject area section, click the **Caret** icon next to **Budget Fund Code**.

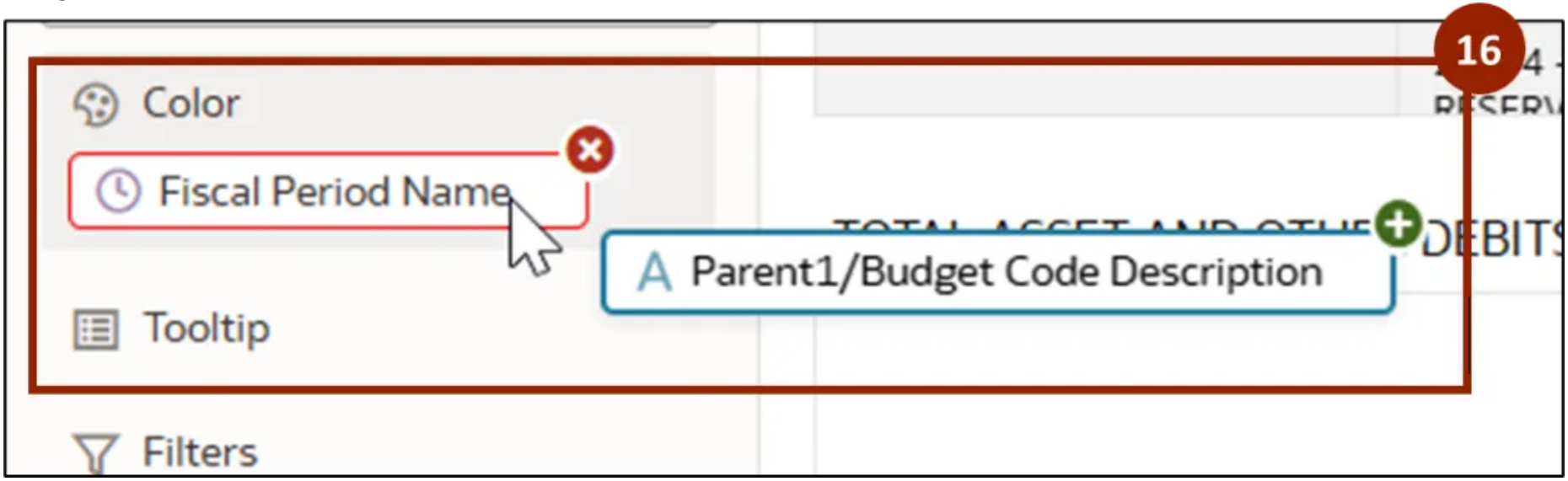
Step 15. Select and hold **Parent1/Budget Code Description**.

Image



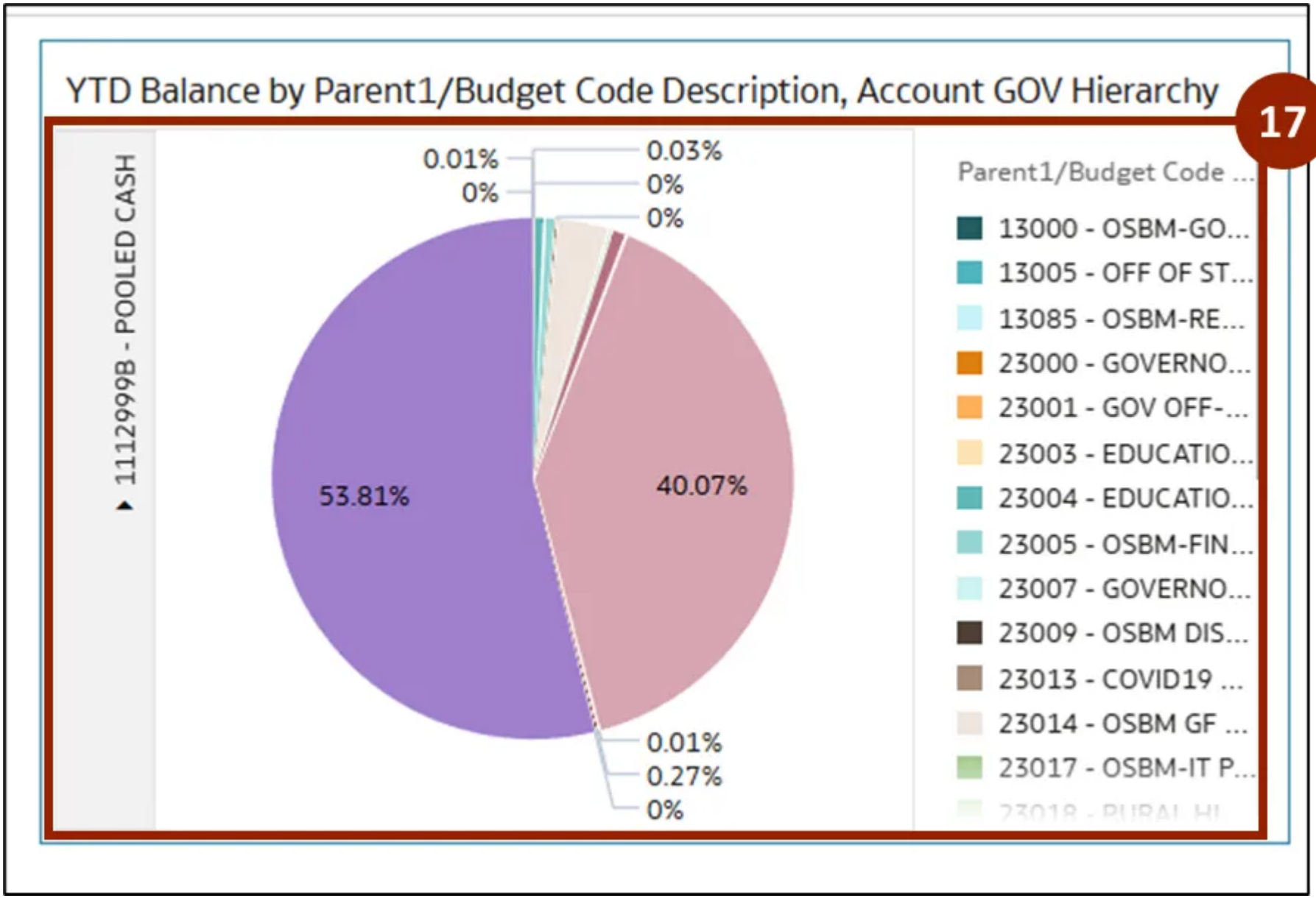
Step 16. Drag **Parent1/Budget Code Description** and drop it onto the Color section, replacing the existing color field.

Image



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.

Image


YTD Balance by Parent1/Budget Code Description, Account GOV Hierarchy
17
▲ 1112999B - POOLED CASH
0.01%
0%
0.03%
0%
0%
53.81%
40.07%
0.01%
0.27%
0%
Parent1/Budget Code ...
13000 - OSBM-GO...
13005 - OFF OF ST...
13085 - OSBM-RE...
23000 - GOVERNO...
23001 - GOV OFF-...
23003 - EDUCATIO...
23004 - EDUCATIO...
23005 - OSBM-FIN...
23007 - GOVERNO...
23009 - OSBM DIS...
23013 - COVID19 ...
23014 - OSBM GF ...
23017 - OSBM-IT P...

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

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