

Create Your First Visualization

Before You Begin

This lab shows you how to create a workbook, select data to use in the visualization, and modify the visualization. You learn how to filter, modify data properties, and change the visualization type.

Background


You use a spreadsheet file as the data source for the workbook's visualization.

What Do You Need?

- Access to Oracle Analytics
- Download `sample_revenue.xlsx` file to a location on your computer

Create a Dataset

In this section, you add the `sample_revenue.xlsx` file to Oracle Analytics to create a dataset. The dataset provides the data for creating visualizations.

1. Sign in to Oracle Analytics.
2. On the Home page, click **Create**, and then click **Dataset**.
3. In Create Dataset, click **Drop data file here or click to browse**. In File Upload, click **sample_revenue.xlsx**, and then click **Open**.
4. In Create Dataset Table from `sample_revenue.xlsx`, click **OK**. Click **Save** . In Save Dataset As, enter Sample Revenue in **Name**, and then click **OK**.
5. In the Join Diagram, click **Create Workbook**.

sample_revenue

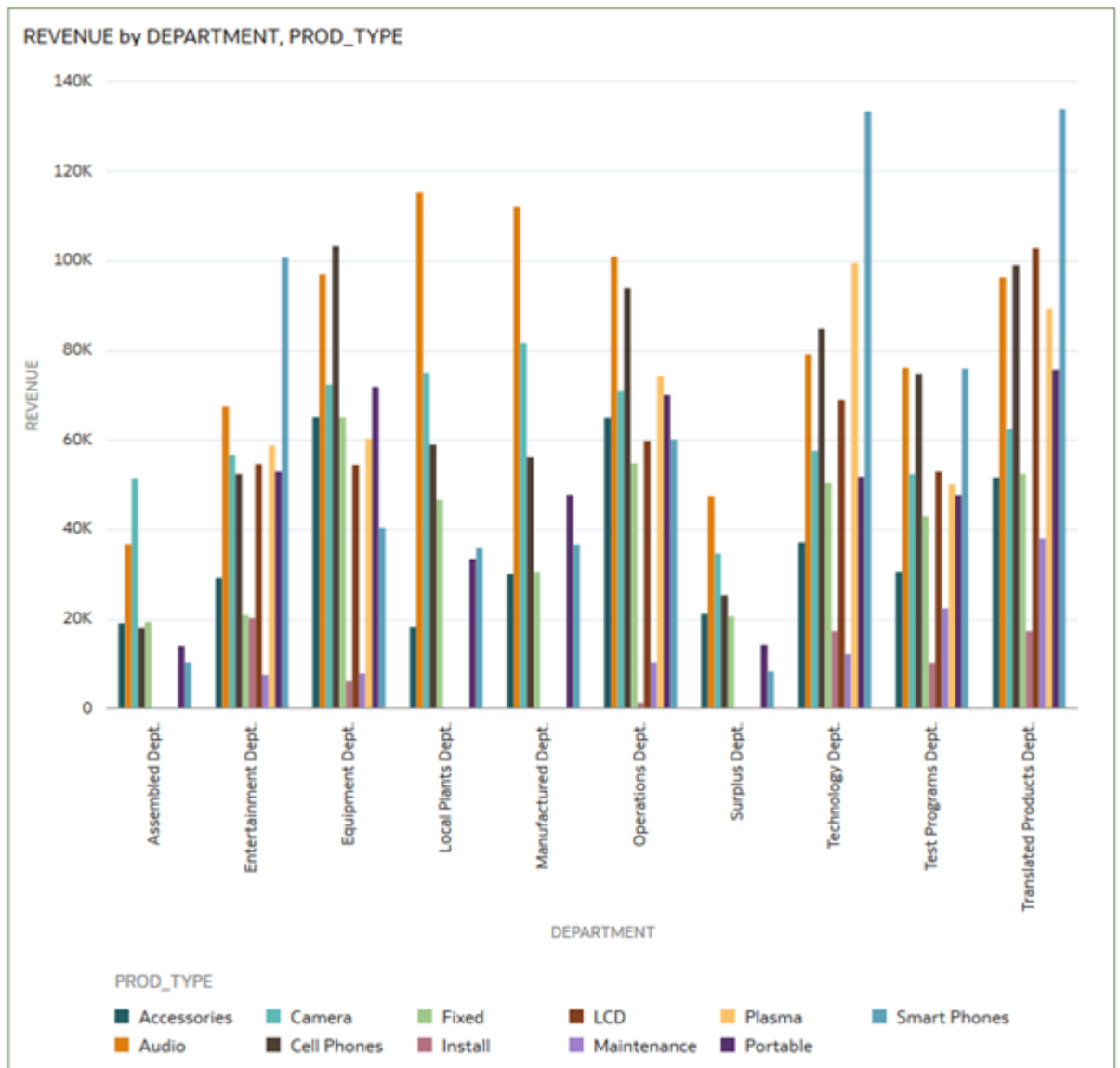
OFFICE_NAME	COMPANY	ORGANIZATION	DEPARTMENT	OFFICE_NAME
Spring Office	Tescare Ltd.	Inbound Org.	Technology Dept.	
Eiffel Office	Stockplus Inc.	Subsidiaries Org.	Translated Products ...	
Casino Office	Genmind Corp	Franchises Org.	Equipment Dept.	
Perry Office		International Org.	Operations Dept.	
Foster Office		Production Org.	Test Programs Dept.	
Sherman Office		Subcontracted Org.	Entertainment Dept.	
Mills Office			Manufactured Dept.	
Blue Bell Office			Local Plants Dept.	
Tellaro Office			Surplus Dept.	
Guadalupe Off...			Assembled Dept.	
A OFFICE_NAME	A COMPANY	A ORGANIZATION	A DEPARTMENT	# C
Montgomery Office	Stockplus Inc.	Inbound Org.	Entertainment Dept.	
Madison Office	Stockplus Inc.	International Org.	Translated Products Dept.	
Eiffel Office	Tescare Ltd.	Subsidiaries Org.	Equipment Dept.	
Blue Bell Office	Stockplus Inc.	Inbound Org.	Entertainment Dept.	
Sherman Office	Stockplus Inc.	International Org.	Translated Products Dept.	
Casino Office	Tescare Ltd.	Subsidiaries Org.	Test Programs Dept.	
Eden Office	Stockplus Inc.	International Org.	Translated Products Dept.	
Perry Office	Tescare Ltd.	Subsidiaries Org.	Equipment Dept.	

Create Visualizations

In this section, you create a visualization, change the visualization type, and change the data elements used in the visualization.

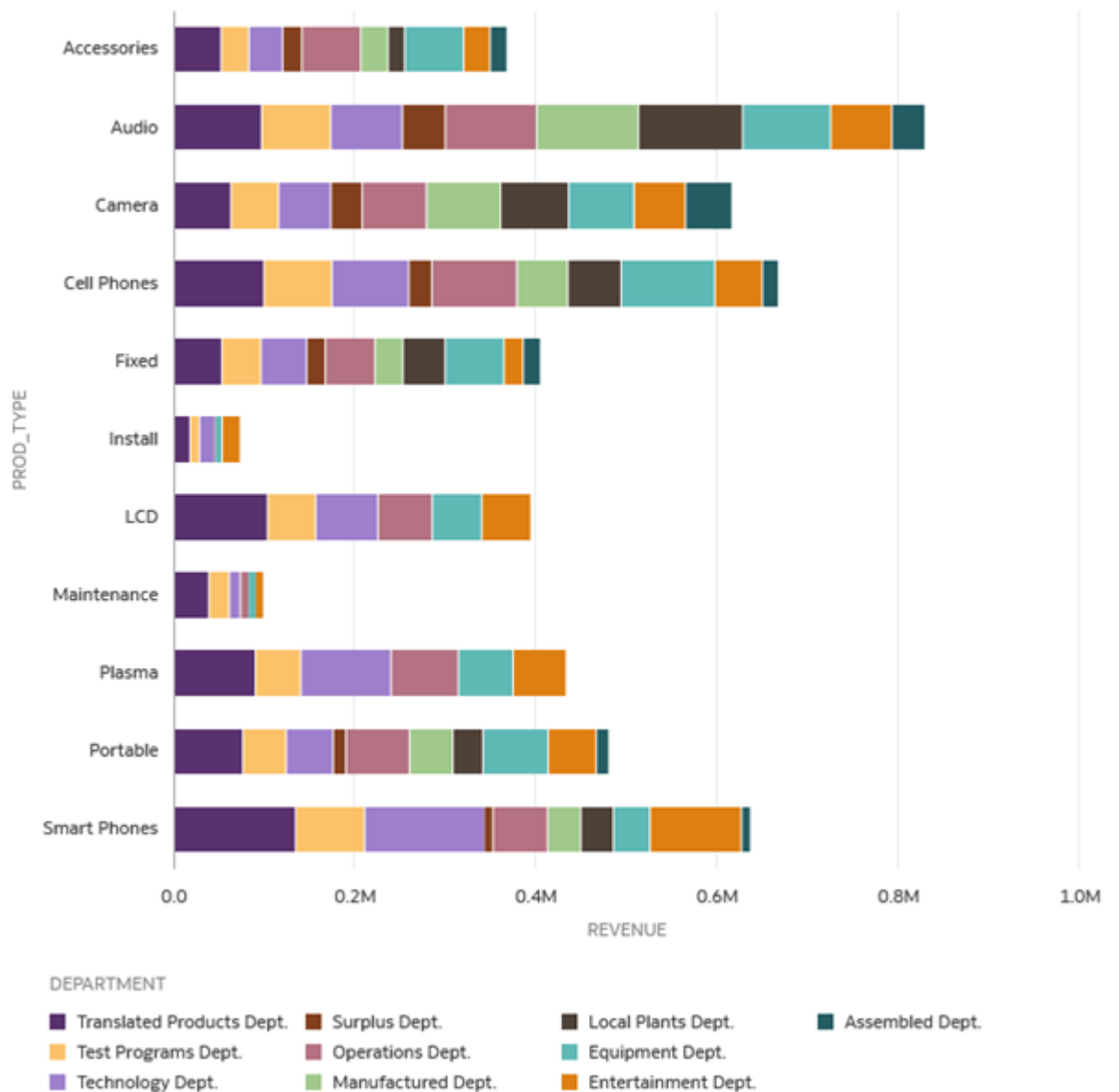
- In Data panel, hold down the **Ctrl** key, select and drag the following to the canvas:
 - PROD_TYPE**
 - REVENUE**
 - DEPARTMENT**

Oracle Analytics chooses the best visualization type for the selected data elements.



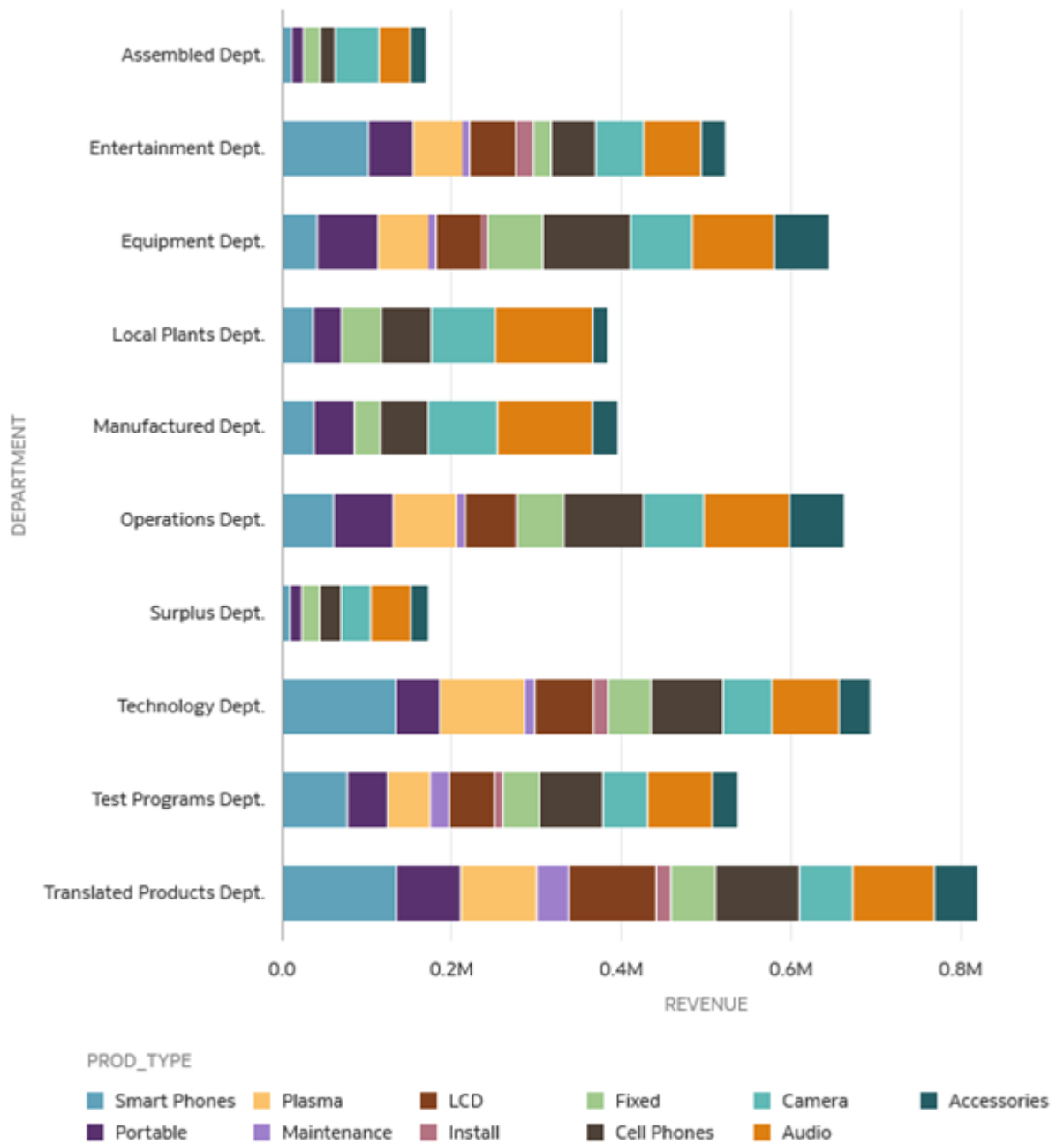
- Click the **visualization type** list ▼ and select **Horizontal Stacked** as the visualization type.

REVENUE by PROD_TYPE, DEPARTMENT




3. Select **PROD_TYPE** and drag it to **Color** so that PROD_TYPE and DEPARTMENT exchange places in the Grammar pane.

REVENUE by DEPARTMENT, PROD_TYPE

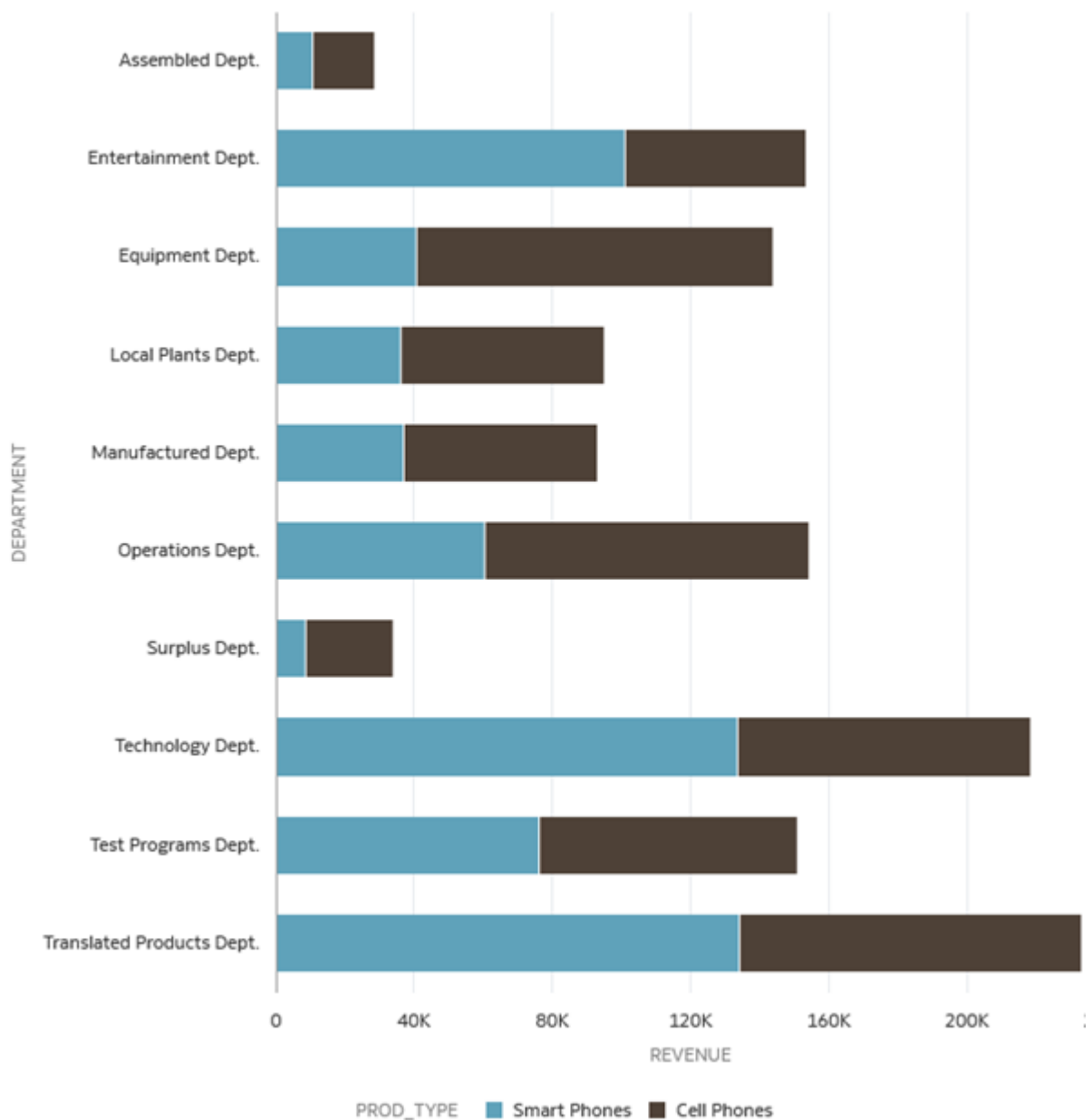



Filter the Data

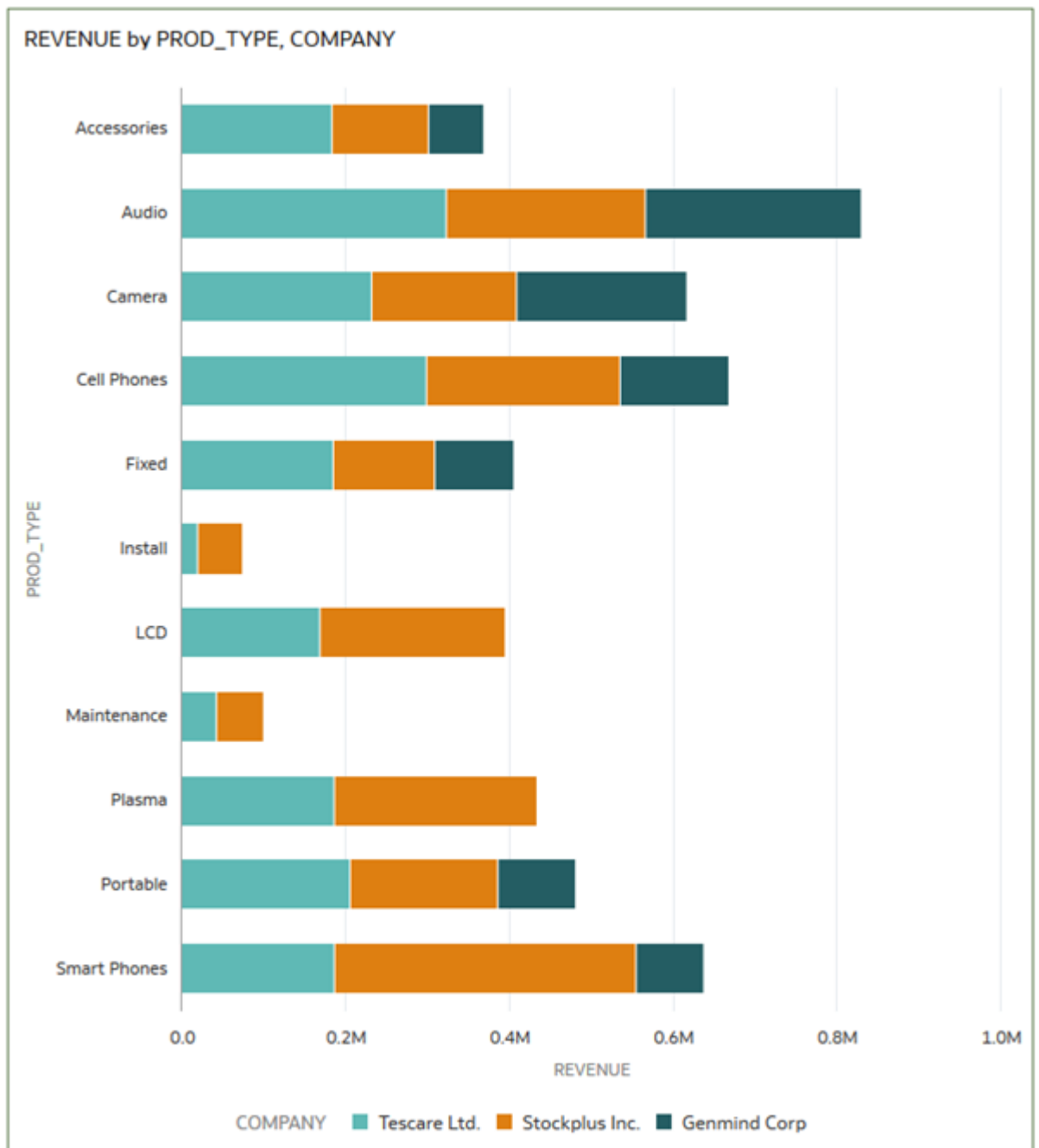
In this section, you add a filter to the visualization to see the changes that result in the visualization.

1. In the filter bar, click **Add Filter** .
2. From the **SAMPLE_REVENUE** list, select **PROD_TYPE**.
3. From the **PROD_TYPE** list, select **Cell Phones** and **Smart Phones**, and then click outside the dialog to close the list.

REVENUE by DEPARTMENT, PROD_TYPE



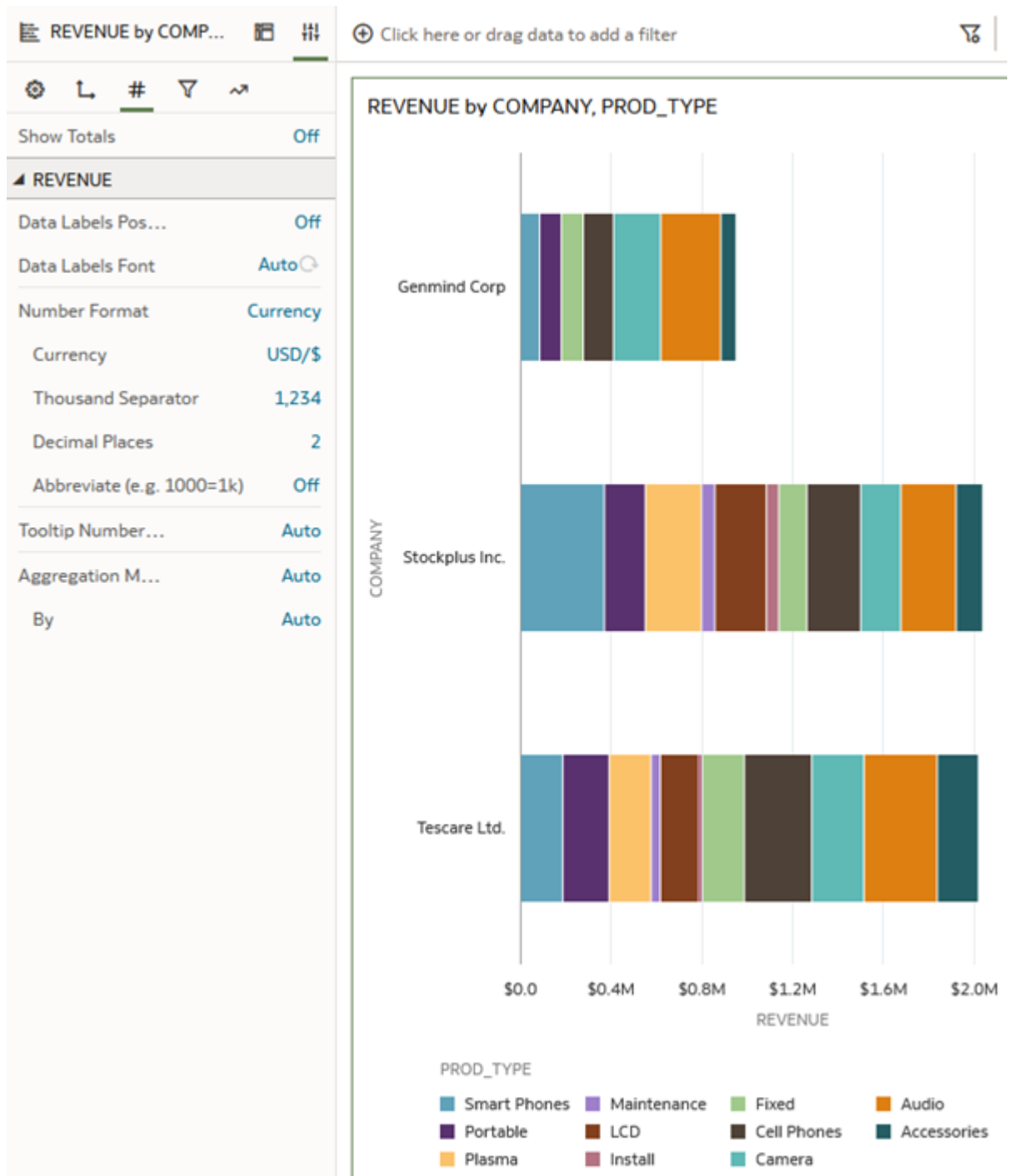
4. From the Data panel, select **COMPANY**, and then drag it to **Category Y-axis** to replace DEPARTMENT.
5. In the filter bar, click **Filter Bar Menu** , and then select **Remove All Filters**.




Change the Properties in a Visualization

In this section, you change a property of a data element in the visualization.

1. In the Revenue by PROD_TYPE, COMPANY visualization, click **Properties**  and click **Values** . Click **Auto** in the Number Format row and select **Currency**.



- In visualization, click the **Menu** , select **Sort By**, select **Revenue**, and then select **High to Low**.

REVENUE by COMPANY, PROD_TYPE

