Capture Insights in Oracle Analytics

Before You Begin

This lab shows how to create insights from data visualizations in Oracle Analytics.

Background

While developing data visualizations, you can capture memorable information in an insight. An insight is a snapshot of any information that you determine is pertinent in a visualization. You can change and refine insights as needed and share your insights with others. You share insights in the form of a story.

This is the first lab in the series *Capture Insights and Build Stories*. Complete the lab in the order listed.

- Capture Insights
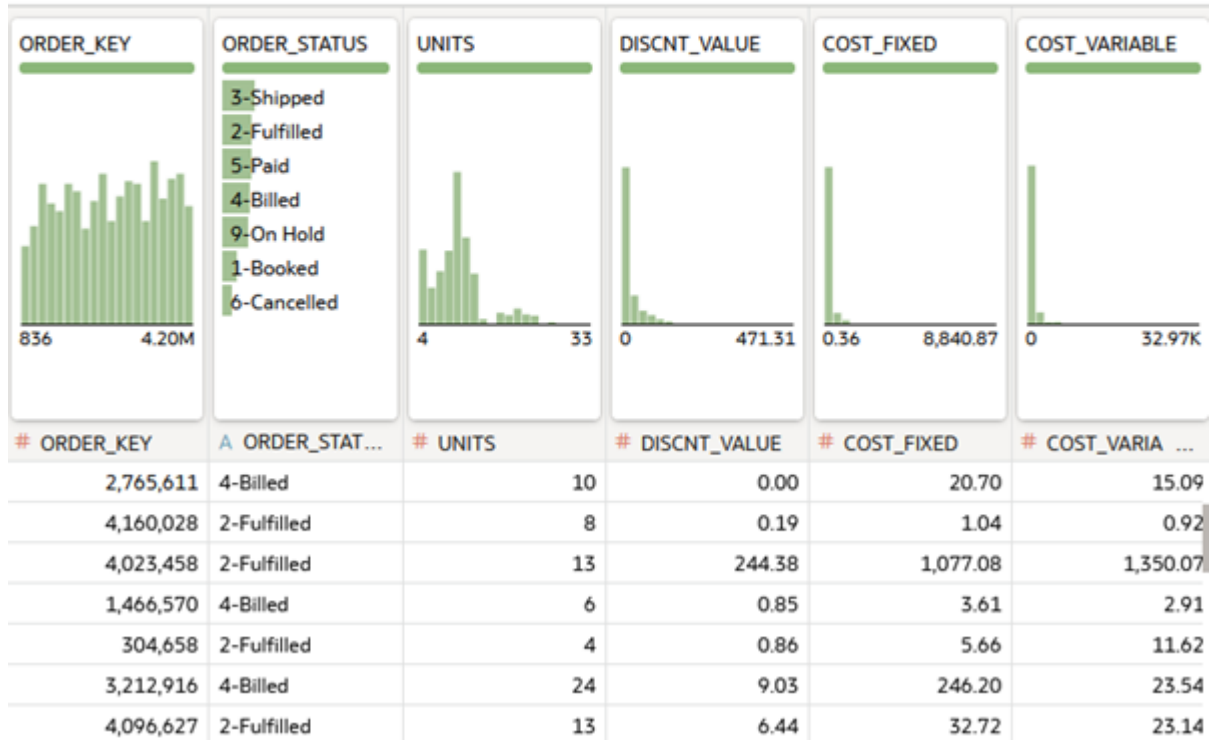- Build Stories

What Do You Need?

- Access to Oracle Analytics
- Download customer_sales.csv to your computer

Create a Dataset and Project

In this section, you add a customer_sales spreadsheet as the dataset to use in this tutorial.

1. Sign in to Oracle Analytics.

2. On the Home page, click **Create**, and then select **Dataset**.
3. In Create Dataset, click **Drop data file here or click to browse**. In File Upload, select the customer_sales.csv file, and then click **Open**.
4. In Create Dataset Table from customer_sales.csv, click **OK**.
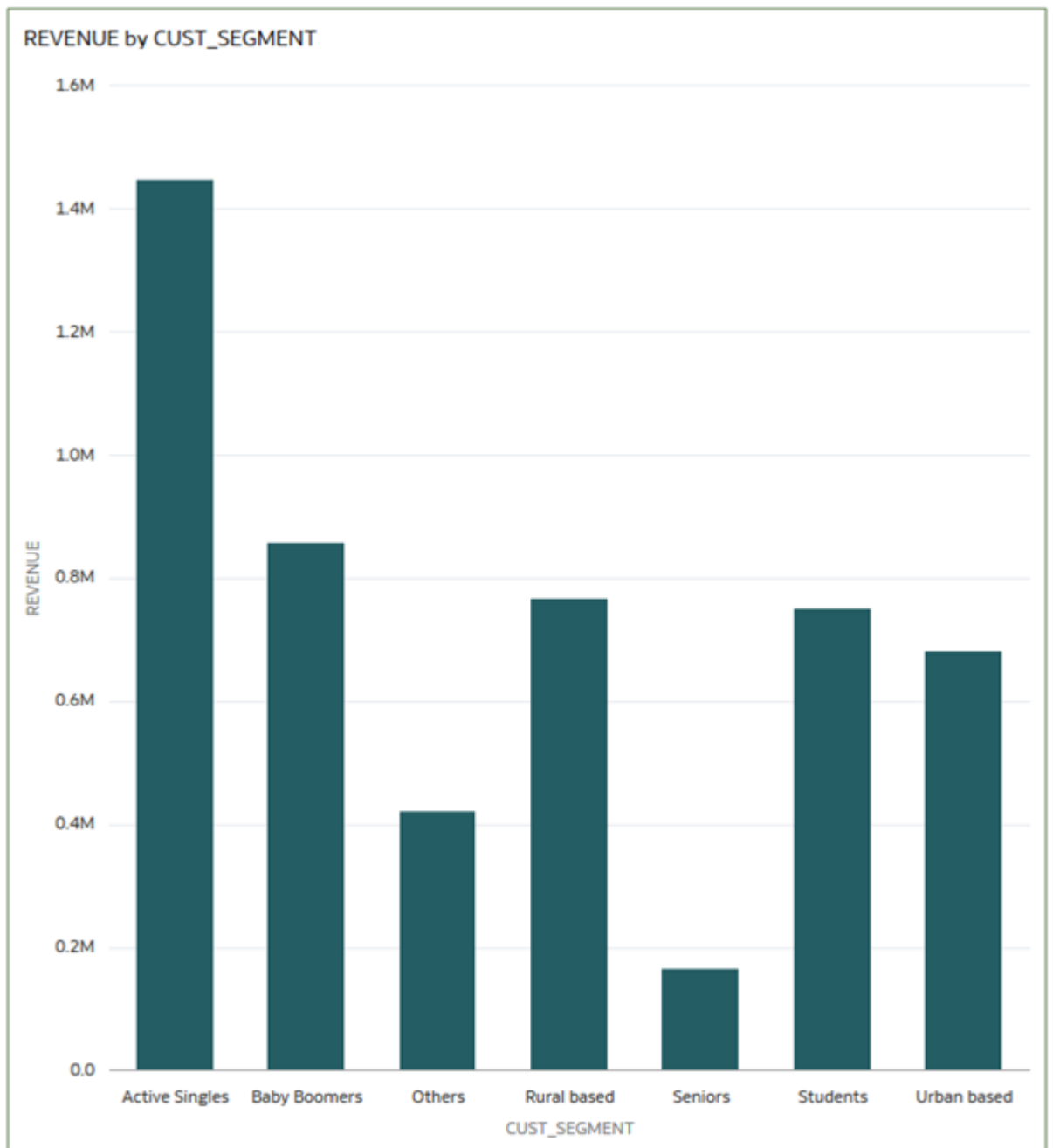5. Click **Save**. In Save Dataset As, enter customer_sales, and then click **OK**.

customer_sales

ORDER_KEY	ORDER_STATUS	UNITS	DISCNT_VALUE	COST_FIXED	COST_VARIABLE
836 — 4.20M	3-Shipped, 2-Fulfilled, 5-Paid, 4-Billed, 9-On Hold, 1-Booked, 6-Cancelled	4 — 33	0 — 471.31	0.36 — 8,840.87	0 — 32.97K

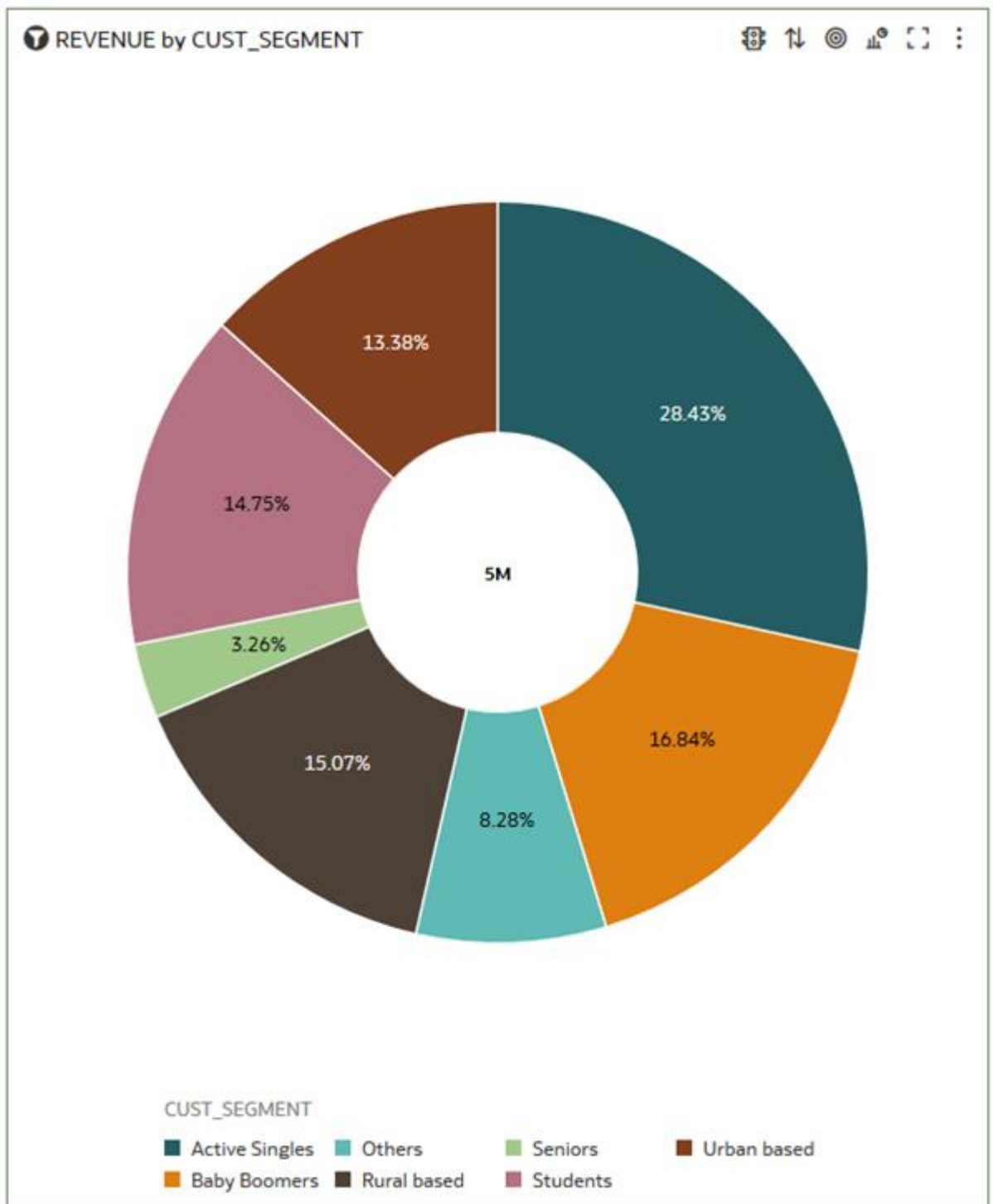| # ORDER_KEY	A ORDER_STAT...	# UNITS	# DISCNT_VALUE	# COST_FIXED	# COST_VARIA ...
2,765,611	4-Billed	10	0.00	20.70	15.09
4,160,028	2-Fulfilled	8	0.19	1.04	0.92
4,023,458	2-Fulfilled	13	244.38	1,077.08	1,350.07
1,466,570	4-Billed	6	0.85	3.61	2.91
304,658	2-Fulfilled	4	0.86	5.66	11.62
3,212,916	4-Billed	24	9.03	246.20	23.54
4,096,627	2-Fulfilled	13	6.44	32.72	23.14

Create Visualizations

In this section, you create visualizations to gain insights about the revenue data.

1. Click **Create Workbook**.

2. Review the automatically generated insights, and then close the Auto Insights panel.

3. In the Data panel, hold down the **Ctrl** key,
   select **CUST_SEGMENT** and **REVENUE**, and then drag them to the canvas.

REVENUE by CUST_SEGMENT

4. In the Grammar panel, select **Donut** ⟳ from the visualization type menu ▼.

REVENUE by CUST_SEGMENT

28.43%
16.84%
8.28%
15.07%
3.26%
14.75%
13.38%

5M

CUST_SEGMENT

- Active Singles
- Others
- Seniors
- Urban based
- Baby Boomers
- Rural based
- Students

5. Click **Save** 💾. In Save Workbook, enter Revenue Insights in **Name**, and then click **Save**.

Create a Filter

In this section, you create a filter to restricts the data to values from a specific region. You apply to filter to all visualizations created in the workbook.

1. Click **Add Filter** ⊕. From the customer_sales list, click **Region**. From the Region list, click **Americas**, and then click the **Filter Bar**.
2. Hover over **Region** in the Filter Bar, click **Pin to All Canvases** 📌.
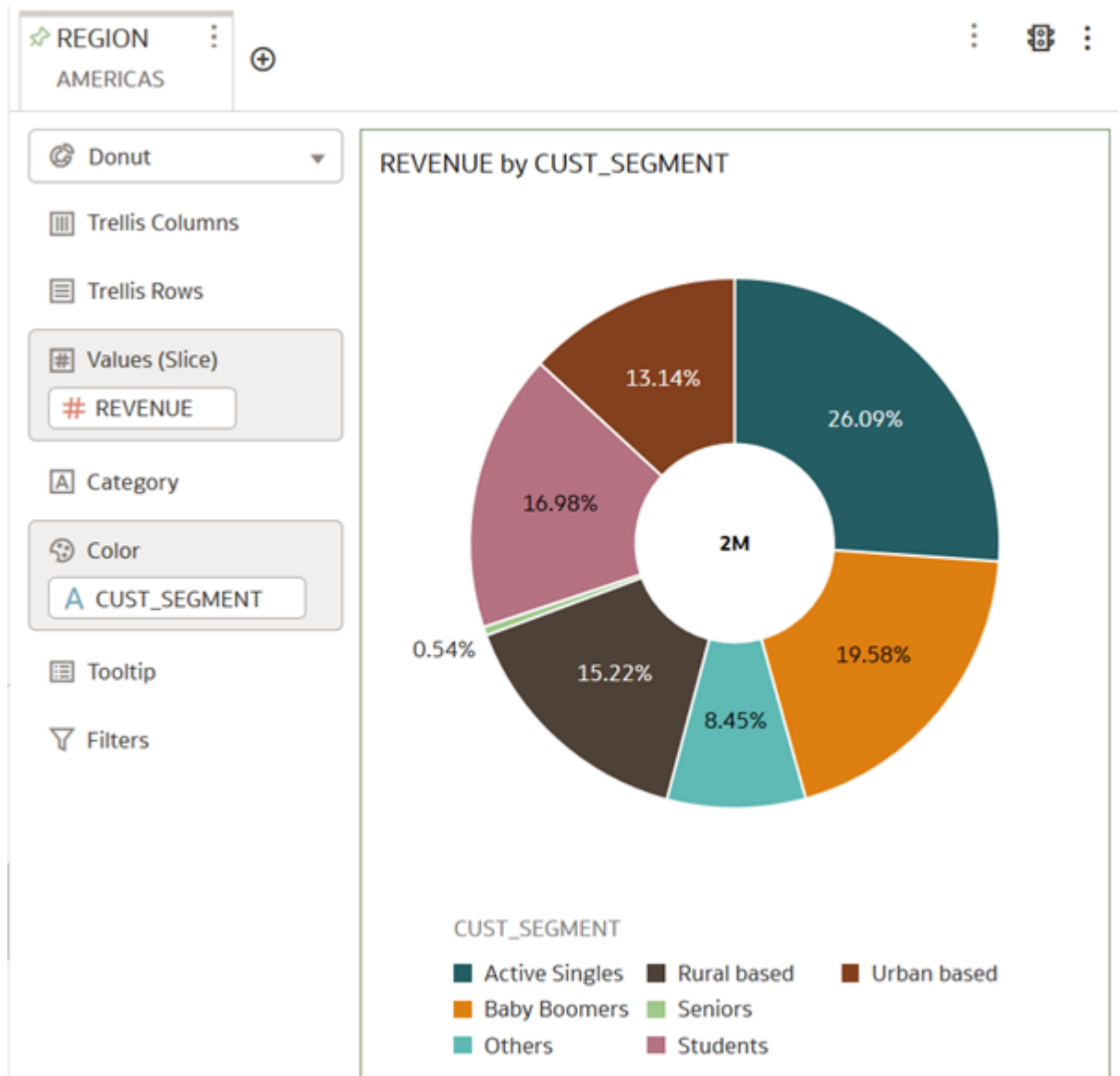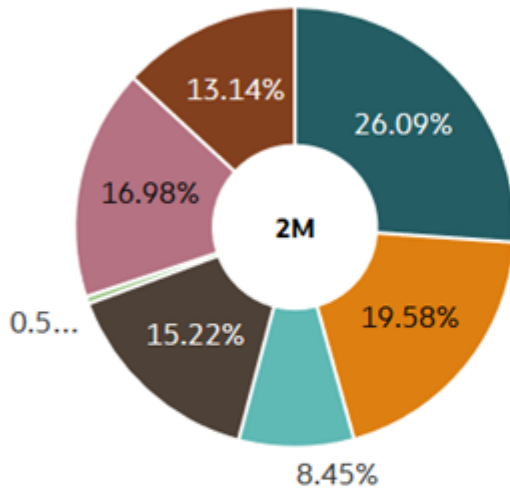

Add Revenue Visualizations

In this section, you create a donut visualization of revenue by product type.

1. In the Data panel, hold down the **Ctrl** key, and then select **REVENUE** and **PROD_TYPE**. Right-click, select **Pick Visualization**, and then select **Donut** 🍩.
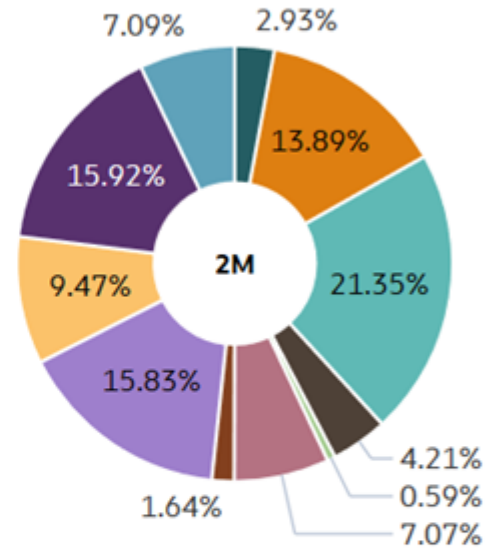
REVENUE by CUST_SEGMENT

26.09%
19.58%
8.45%
15.22%
0.5...
16.98%
13.14%
2M

CUST_SEGMENT

- Active Singles
- Baby Boomers
- Others
- Rural based
- Seniors
- Students
- Urban based

REVENUE by PROD_TYPE

7.09%
2.93%
13.89%
21.35%
4.21%
0.59%
7.07%
1.64%
15.83%
9.47%
15.92%
2M

PROD_TYPE

- Accessories
- Audio
- Camera
- Fixed
- Install
- Maintenance
- Phones
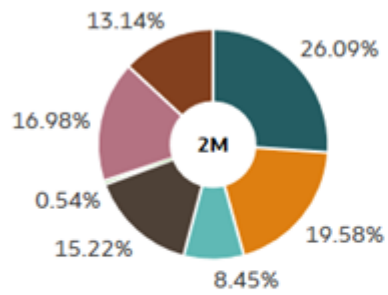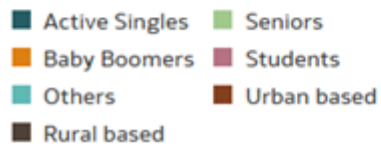- Plasma
- Portable
- Smart Phones

2. Click **Save**.

Duplicate a Visualization

1. Select the REVENUE by CUST_SEGMENT **Menu** ⋮, select **Edit**, and then select **Duplicate Visualization**.
2. Select **CUST_GENDER** from the Data panel, and drag it to **Color** to replace CUST_SEGMENT.
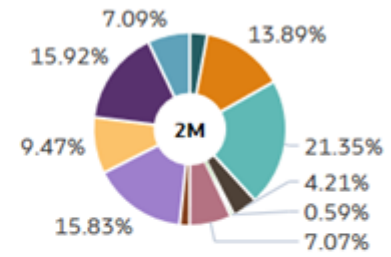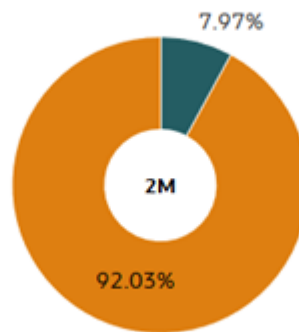
REVENUE by CUST_SEGMENT

13.14%
26.09%
16.98%
2M
0.54%
19.58%
15.22%
8.45%

CUST_SEGMENT

- Active Singles
- Seniors
- Baby Boomers
- Students
- Others
- Urban based
- Rural based

REVENUE by PROD_TYPE

7.09%
13.89%
15.92%
2M
9.47%
21.35%
4.21%
0.59%
15.83%
7.07%

PROD_TYPE

- Accessories
- Maintenance
- Audio
- Phones
- Camera
- Plasma
- Fixed
- Portable
- Install
- Smart Phones

REVENUE by CUST_GENDER

7.97%
2M
92.03%
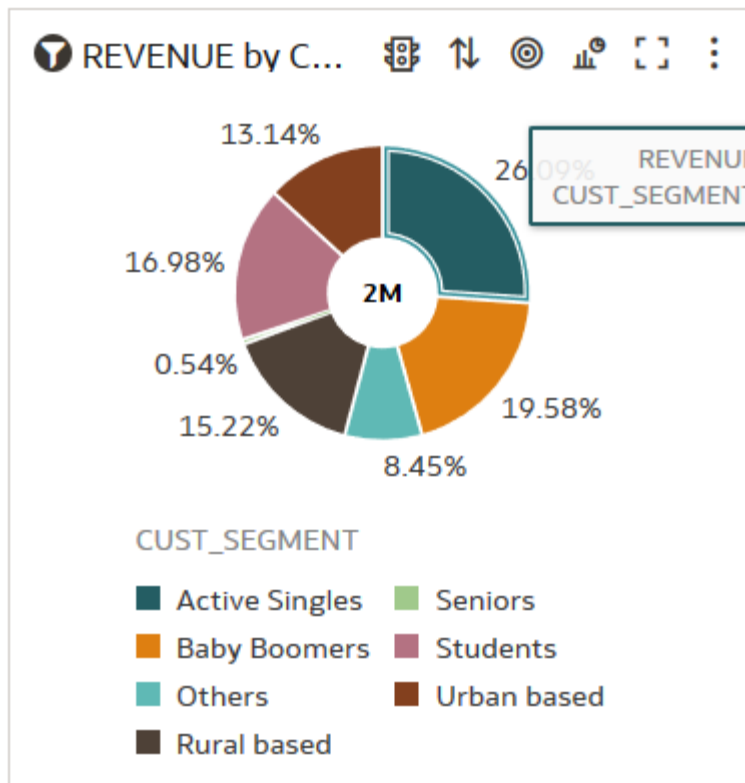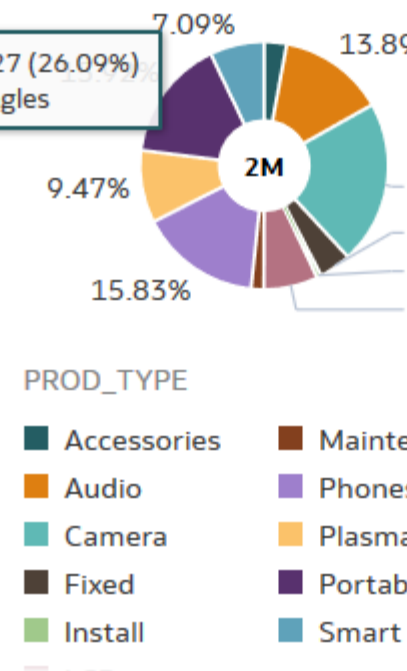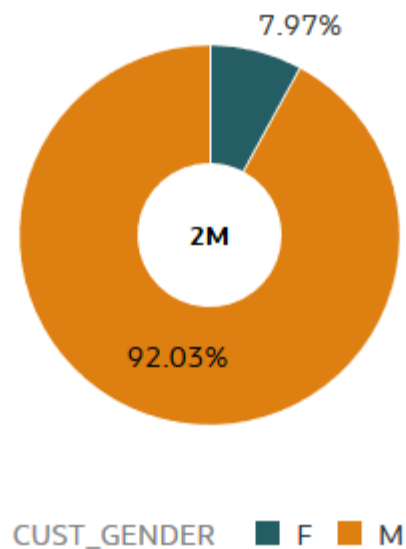
CUST_GENDER   F   M

3. In the Revenue by Gender visualization, select **Menu** ⋮, select **Edit**, and then select **Duplicate Visualization**.

4. In the Data panel, select **COUNTRY_NAME**, drag it to **Color** to replace CUST_GENDER.
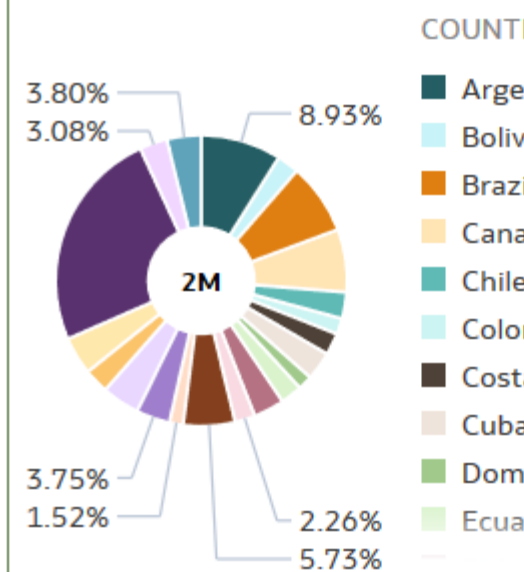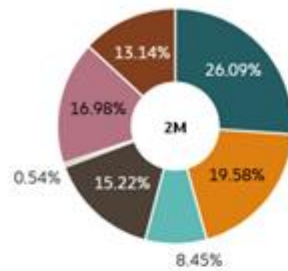
REVENUE by C... (REVENUE by CUST_SEGMENT)

13.14%
26.09%
16.98%
0.54%
15.22%
8.45%
19.58%

REVENUE 527,358.27 (26.09%)
CUST_SEGMENT Active Singles

2M

CUST_SEGMENT

- Active Singles
- Seniors
- Baby Boomers
- Students
- Others
- Urban based
- Rural based

REVENUE by PROD_TYPE

7.09%
13.89%
9.47%
15.83%

2M

PROD_TYPE

- Accessories
- Mainte
- Audio
- Phones
- Camera
- Plasma
- Fixed
- Portab
- Install
- Smart

REVENUE by CUST_GENDER

7.97%

2M

92.03%

CUST_GENDER F M

REVENUE by COUNTRY_NAME

3.80%
3.08%
8.93%
3.75%
1.52%
2.26%
5.73%

2M

COUNT

- Arge
- Boliv
- Brazi
- Cana
- Chile
- Colo
- Costa
- Cuba
- Dom
- Ecua

5. Click **Add Note** 🖃. In the note , enter the following:

Males and active singles are our primary customers. Argentina has our second largest customer-revenue base after the United States.
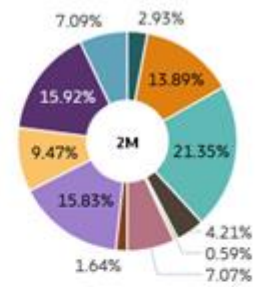
REVENUE by CUST_SEGMENT

Males and active singles are our primary customers. Argentina has our second largest customer-revenue base after the United States.

REVENUE by PROD_TYPE

REVENUE by CUST_GENDER

REVENUE by COUNTRY_NAME

6. Click **Save** 💾.

Create Insights

1. Click **Present**.
2. In the Canvases pane, drag **Canvas 1** to Drag a Canvas Here to Begin.
3. Click **Canvas 1** in the page title bar, enter Revenue Insights Americas in the page title to replace Canvas 1.
4. Use your cursor to select the **Revenue Insights** in the page title, click **Font** in Formatting Styles, and then select Verdana. Click the **Font Size** list and select **36**.
5. Click **Save** 💾.

Revenue Insights

REVENUE by CUST_SEGMENT

13.14%
26.09%
16.98%
0.54%
15.22%
8.45%
19.58%

2M

CUST_SEGMENT

- Active Singles
- Rural based
- Urban based
- Baby Boomers
- Seniors
- Others
- Students

REVENUE by PROD_TYPE

7.09%
2.93%
13.8...
15....
15.83%
4.21%
0.59%
7.07%
1.64%

2M

PROD_TYPE

- Accessories
- Audio
- Camera
- Fixed
- Install
- LCD
- Maintenance
- Phones
- Plasma
- Portable
- Smart Phones

REVENUE by CUST_GENDER

7.97%

2M

92.03%

CUST_GENDER   F   M

Males and active singles are our primary customers. Argentina has our second largest customer-revenue base after the United States.

REVENUE by COUNTRY_NAME

3.8%
3.0...
8.9...
2.4...
4.2%
3.7...
1.5...
2.2...
5.7...

2M

COUNTRY_NAME

- Argentina
- Bolivia
- Brazil
- Canada
- Chile
- Colombia
- Costa Rica
- Cuba
- Dominican Republic
- Ecuador
- El Salvador
- Guatemala

6. Click **Preview** ▷ to review your changes.