OAC-07 Self Service in OAC Classic

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to perform Self Service analysis in Oracle Cloud Analytics (**OAC**) Classic.

Introduction and Overview

This QRG guides users through self service analysis in OAC Classic by outlining how to access, customize, and analyze reports. Users can filter and organize data, drill down for detailed insights, and modify criteria to create tailored, actionable reports—enabling efficient and informed decision-making.

Self Service in OAC Classic

Follow the below steps to perform Self-Service in OAC Classic. There are 13 steps to complete this process.

Step 1. **Navigate** to the desired report and **scroll down** to the bottom of the report. Click **Analyze**.

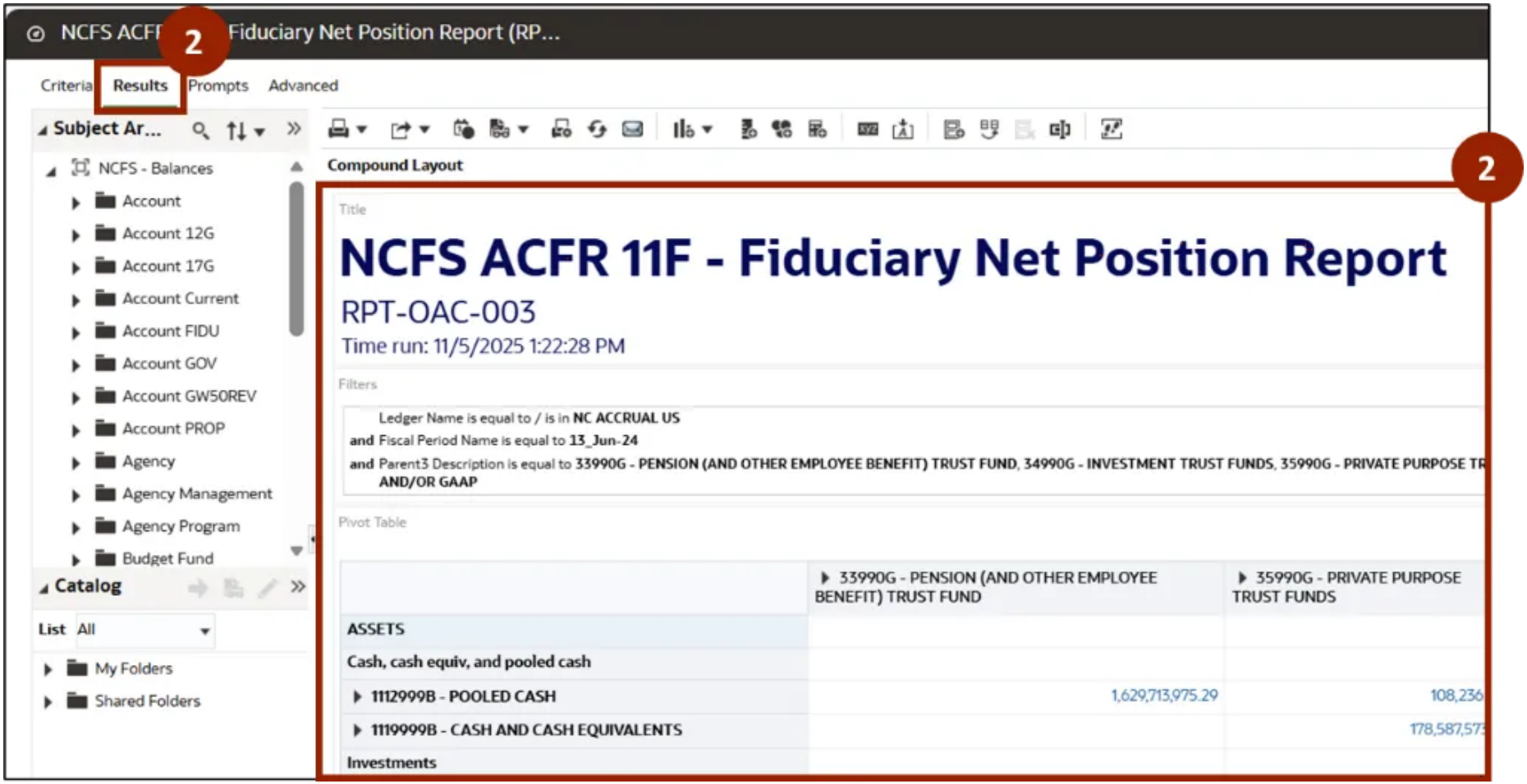
Image



Step 2. After selecting Analyze, the report opens in a new customization window under the **Results** tab.

Note: The Results tab shows data based on the columns selected in the Criteria tab. Data is displayed using user-selected visualizations, such as tables, pivot tables, graphs, and maps.

Image



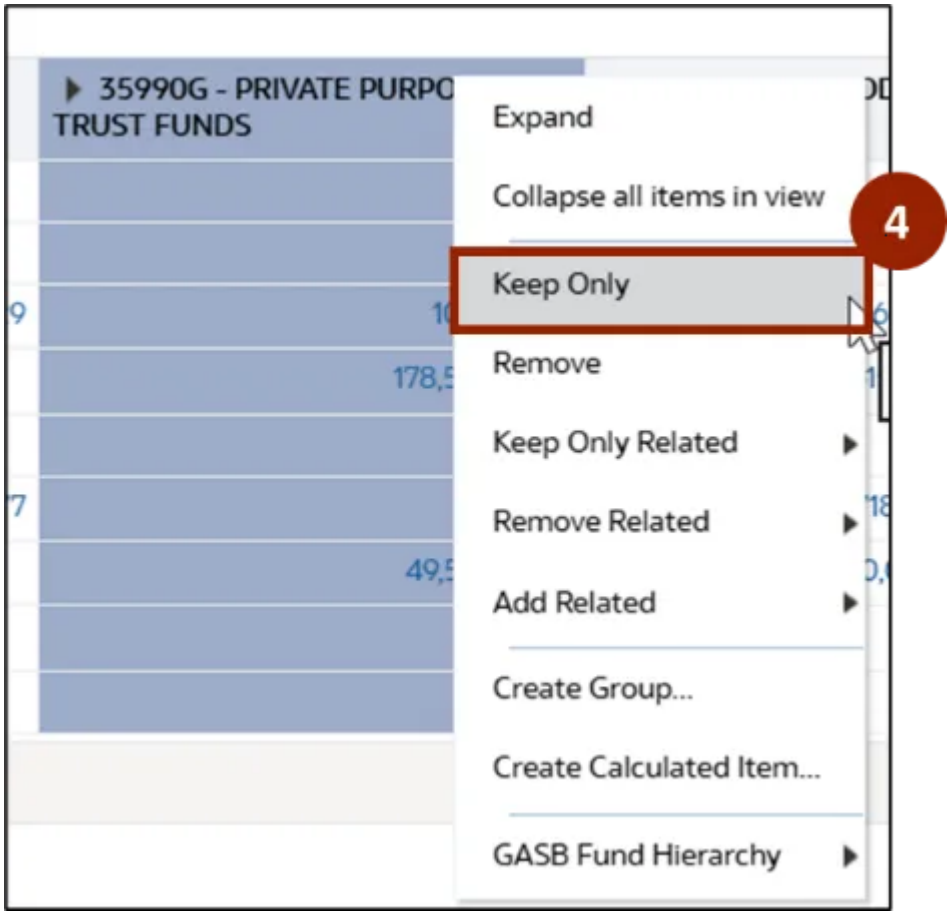
Step 3. The user can **right-click** the desired column in the report to analyze data for that specific column.

Image



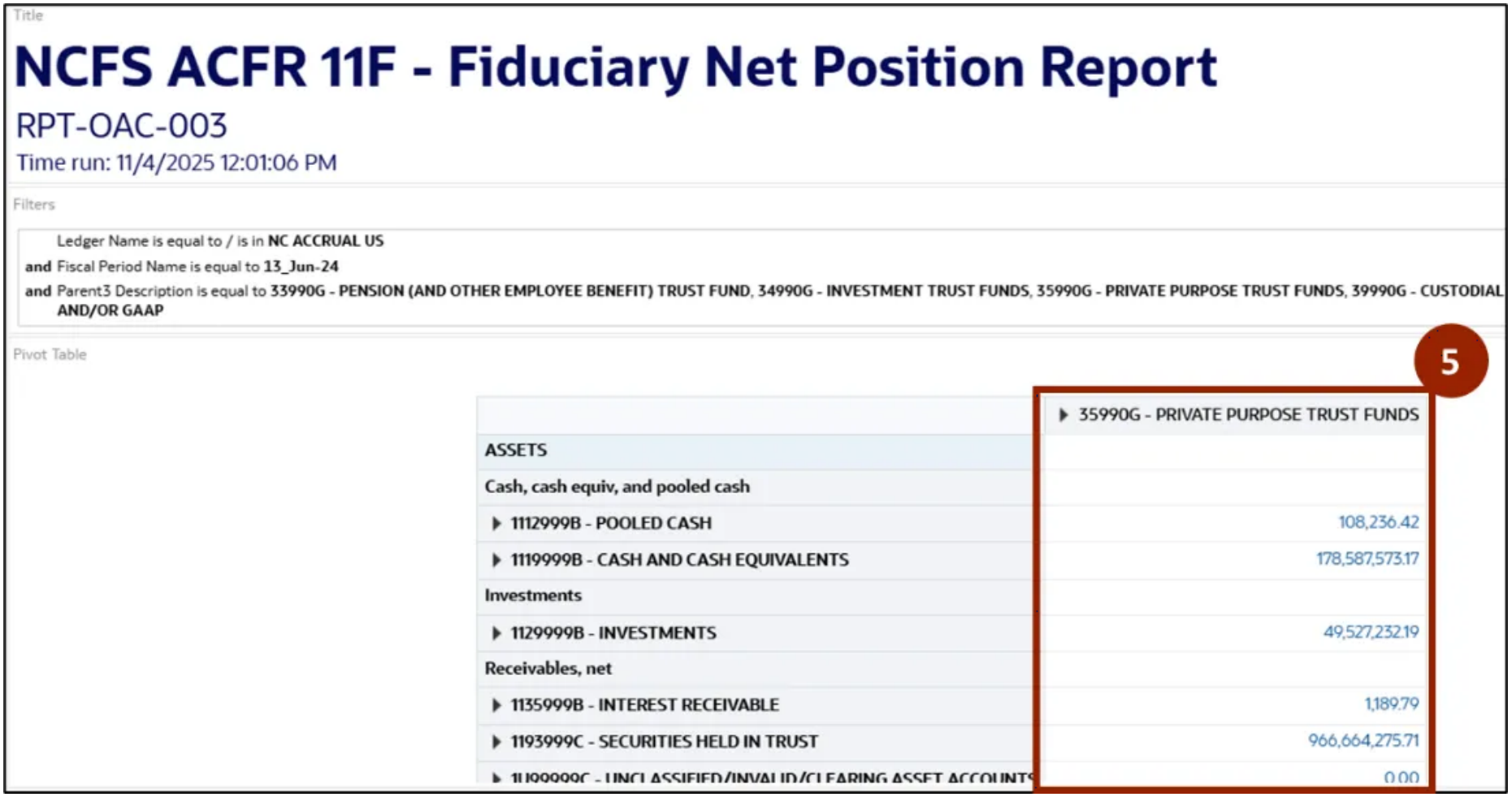
Step 4. A pop-up menu appears. Select **Keep Only** for the required column.

Image



Step 5. The report refreshes, showing only the selected column.

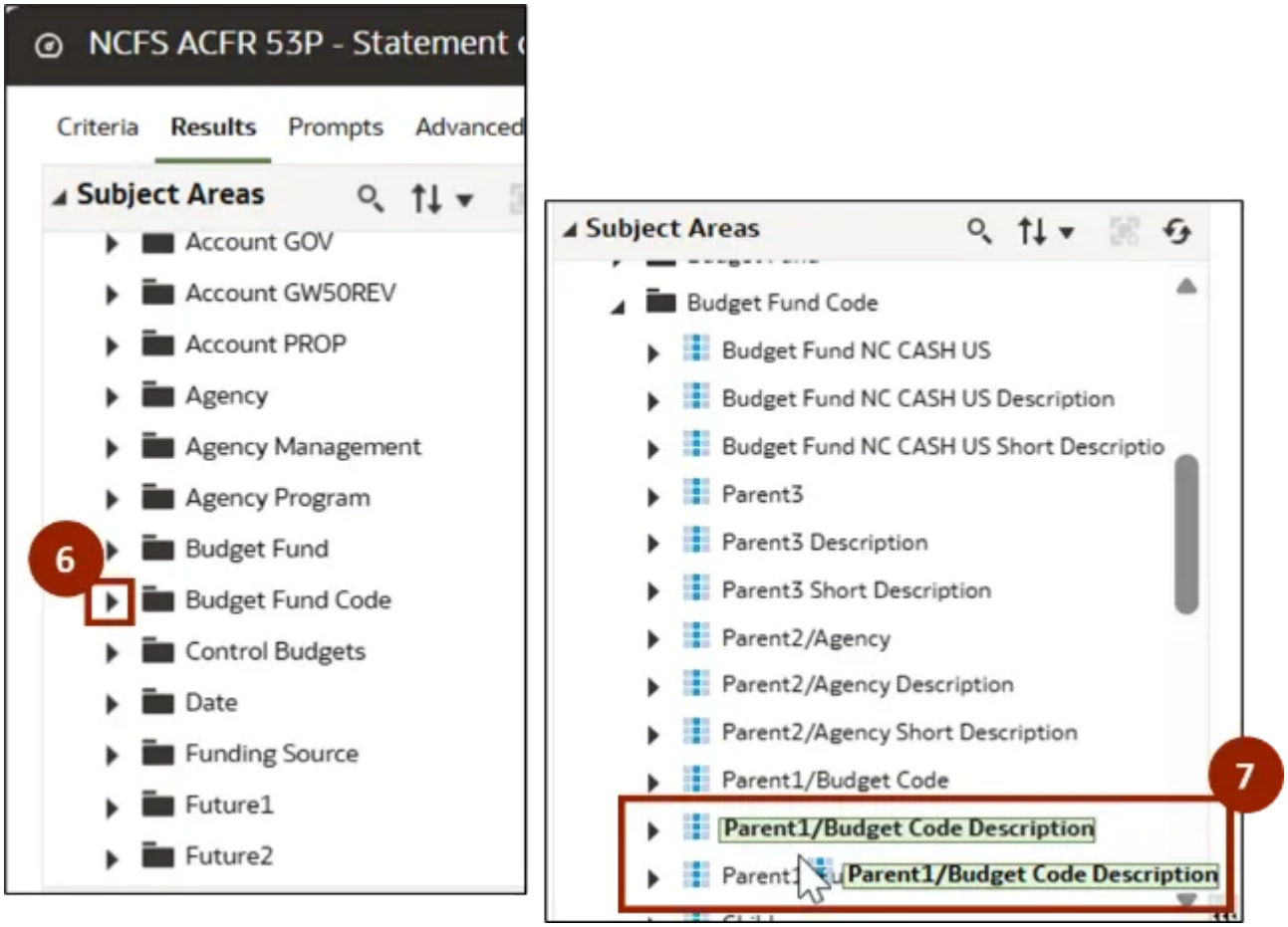
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Step 6. In the Subject Areas section, the list of available agency chart segments is displayed. The user can select the **desired option** from the list. In this example, click the **caret icon** next to **Budget Fund Code** to view the drop-down menu.

Step 7. From the drop-down list, **select** and **hold** Parent1/Budget Code Description.

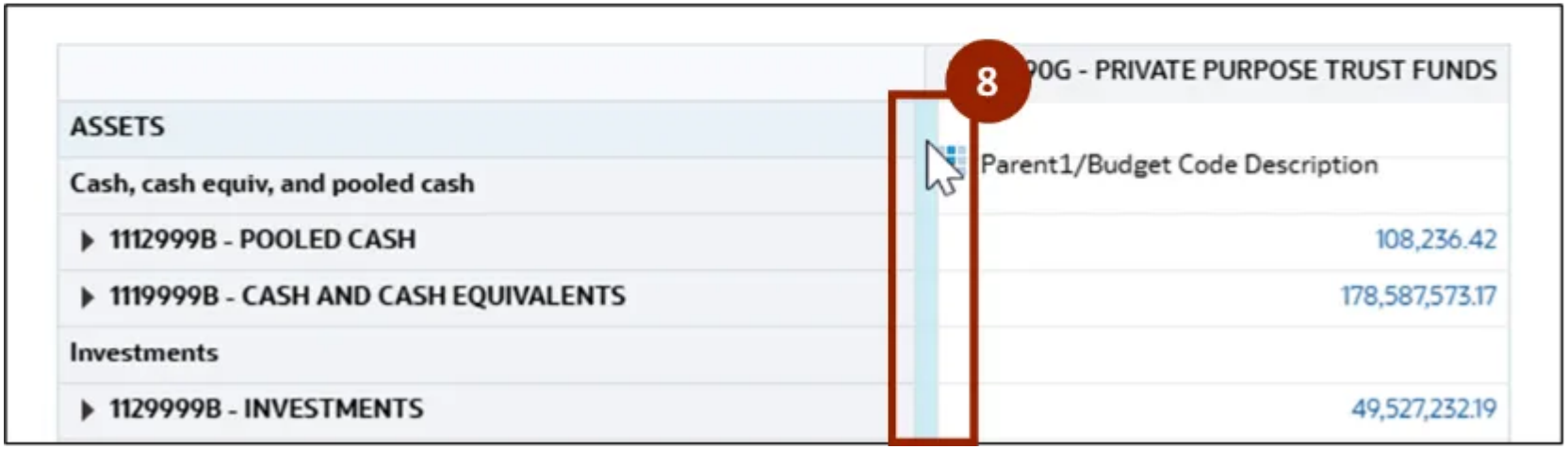
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Step 8. Drag **Parent1/Budget Code Description** and **place** it either below the columns or beside the rows as required.

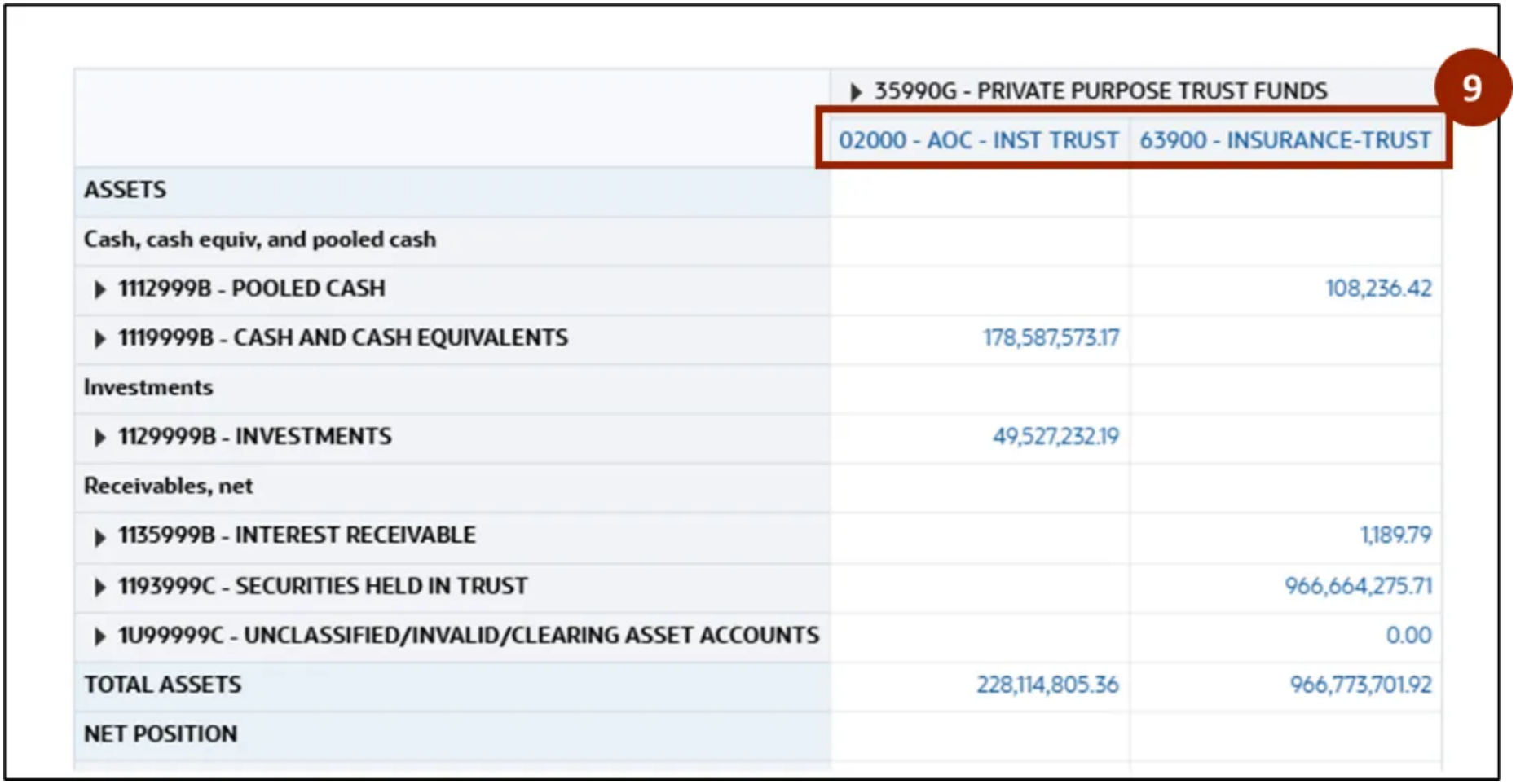
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Step 9. The report **refreshes** to **display** the **Budget Codes** that correspond to each column or row for the specific agency.

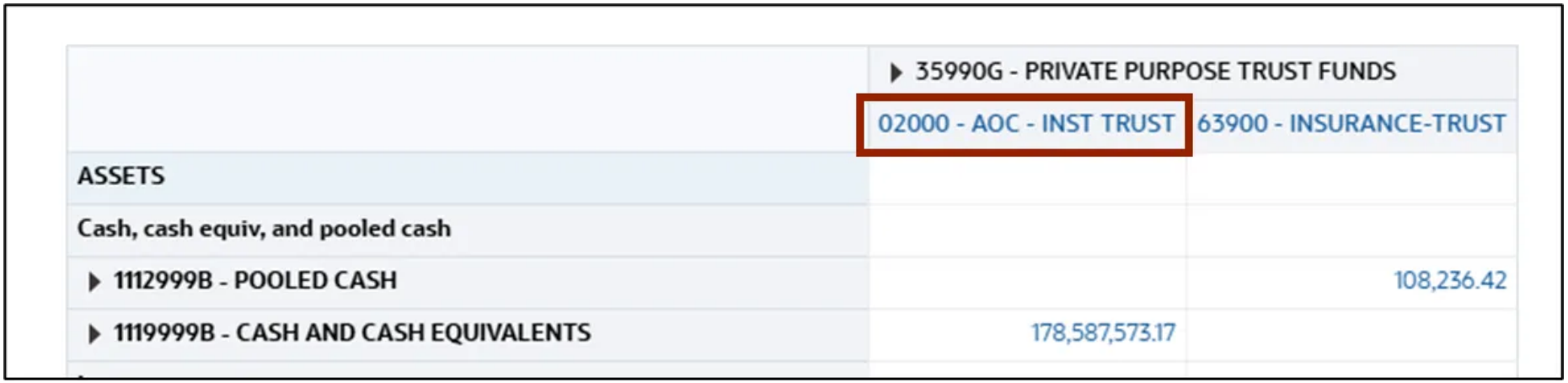
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	▶ 35990G - PRIVATE PURPOSE TRUST FUNDS	
	02000 - AOC - INST TRUST	63900 - INSURANCE-TRUST
ASSETS		
Cash, cash equiv, and pooled cash		
▶ 1112999B - POOLED CASH		108,236.42
▶ 1119999B - CASH AND CASH EQUIVALENTS	178,587,573.17	
Investments		
▶ 1129999B - INVESTMENTS	49,527,232.19	
Receivables, net		
▶ 1135999B - INTEREST RECEIVABLE		1,189.79
▶ 1193999C - SECURITIES HELD IN TRUST		966,664,275.71
▶ 1U99999C - UNCLASSIFIED/INVALID/CLEARING ASSET ACCOUNTS		0.00
TOTAL ASSETS	228,114,805.36	966,773,701.92
NET POSITION		

Note: To view more detailed information, the user can click the specific budget code link located above or below the columns. This allows them to drill down and display the corresponding child-level budget fund details for that column.

Image



	35990G - PRIVATE PURPOSE TRUST FUNDS	
	02000 - AOC - INST TRUST	63900 - INSURANCE-TRUST
ASSETS		
Cash, cash equiv, and pooled cash		
1112999B - POOLED CASH		108,236.42
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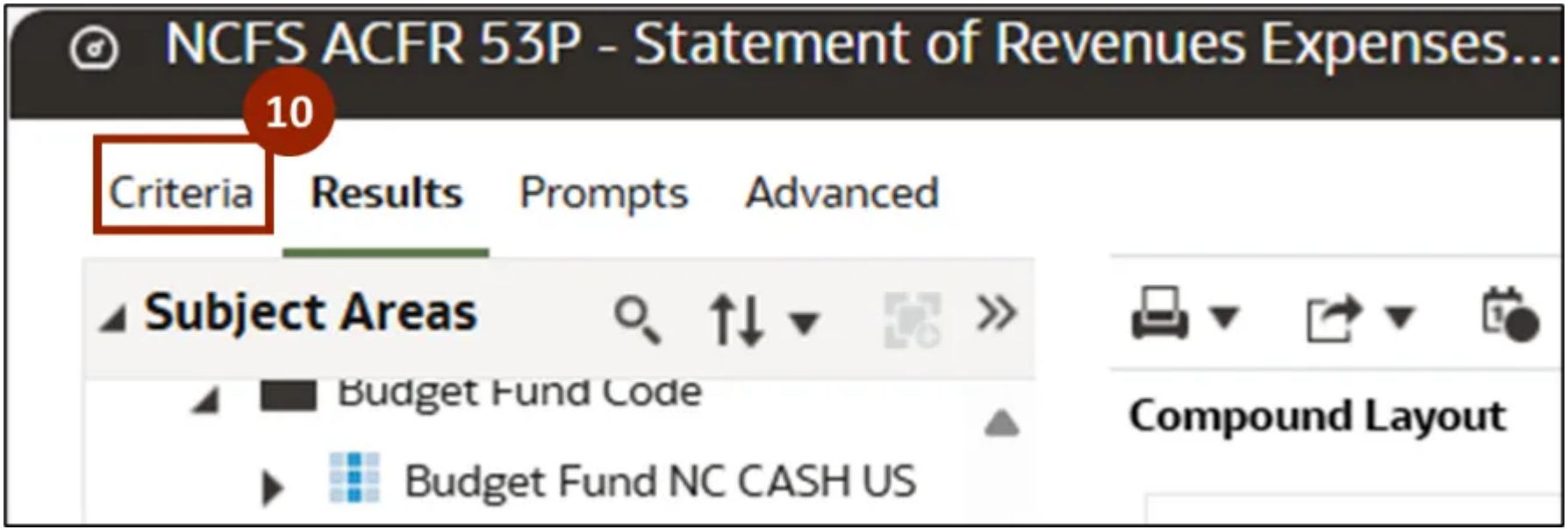


	35990G - PRIVATE PURPOSE TRUST FUNDS
	02000 - AOC - INST TRUST
	000101 - AOC 0101 CSC-PPT
ASSETS	
Cash, cash equiv, and pooled cash	

Step 10. To modify the selection criteria in the report, click the **Criteria** tab.

Note: The Criteria tab contains selected columns from one or more subject areas. It also lets you access column functions, such as sorting and editing properties.

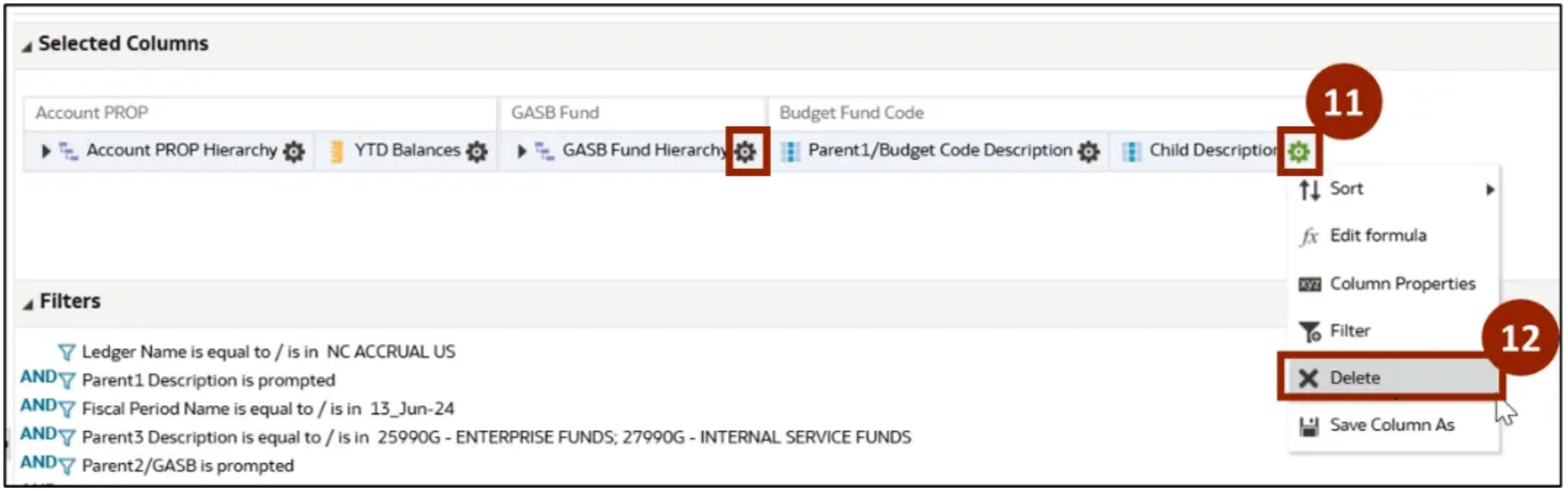
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Step 11. In the Selected Column section, locate the applied selection fields. Click the **gear icon** next to Child Description and Parent1/Budget Code Description.

Step 12. A drop-down list is displayed. Select **Delete** to remove the columns.

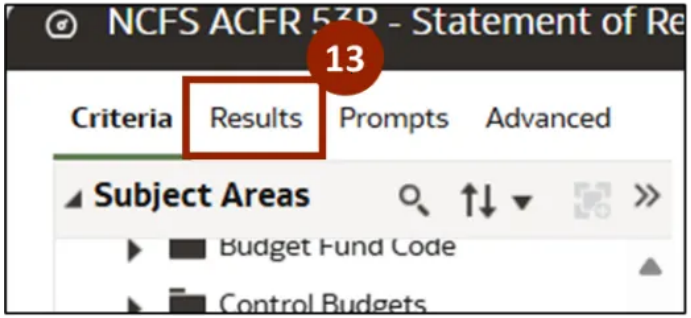
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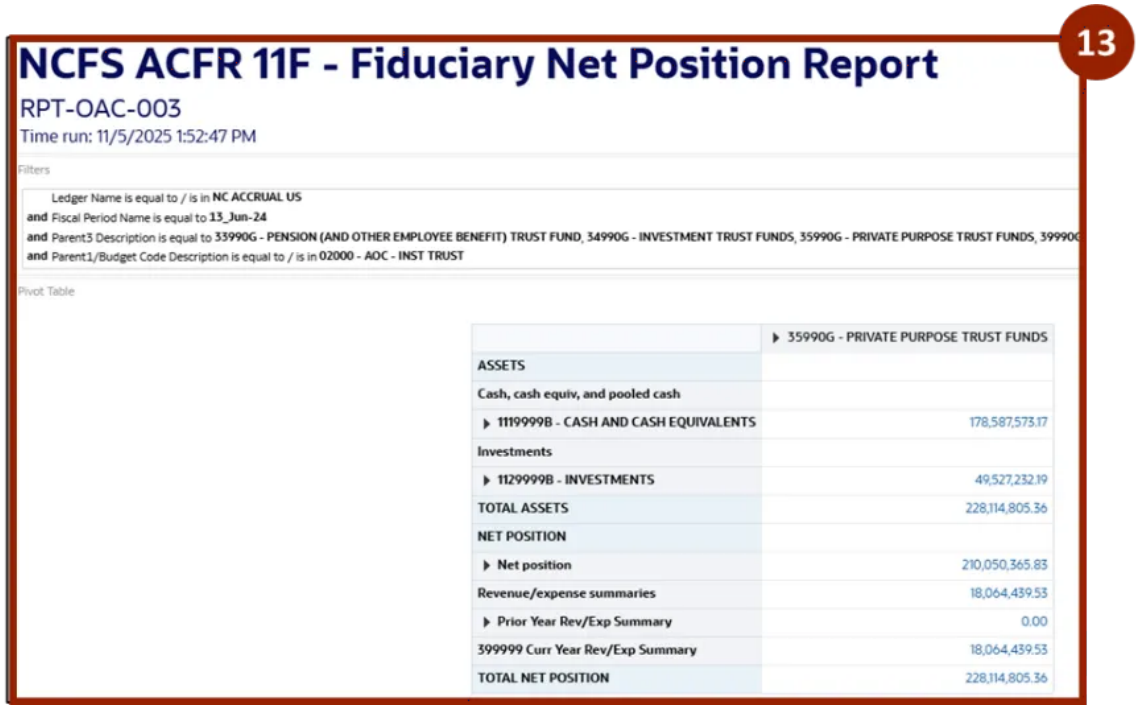


Step 13. Click the **Results** tab to view the refreshed report without the previously applied criteria.

Note: The Prompts and Advanced tabs are advanced features designed for technical users.

Image





Wrap-Up

OAC users can perform self service in OAC Classic using the steps above to independently analysis and customize reports, extracting meaningful insights for efficient and informed decision-making.

Additional Resources

- Virtual Instructor Led Training (vILT)
  - OAC for NCFS 1

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