Hands-on Lab: Different Methods for Creating Dashboard Visualizations with Cognos Analytics

Estimated time needed: 45 minutes

In this lab, first, you will learn how to work in Cognos Analytics with tabs and start a new dashboard within tabs. Then you will learn how to create a simple dashboard. Lastly, you will learn different methods for creating dashboard visualizations.

Software used in this lab

Like the videos in the course, for the hands-on labs, we will be using IBM Cognos Analytics trial version (currently limited to 90 or 30 days), as this is available at no charge.

Dataset used in this lab

The dataset used in this lab comes from the VM designed to showcase IBM Cognos Analytics. This dataset is published by IBM. You can download the dataset file directly from here: CustomerLoyaltyProgram.csv

Objectives

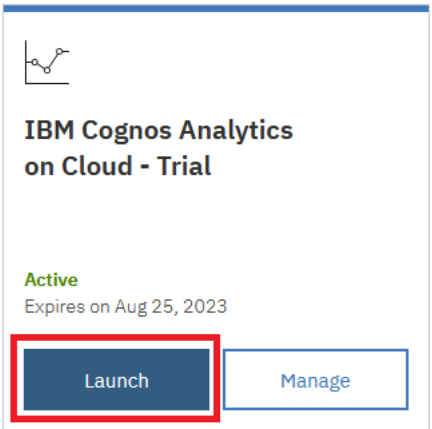
After completing this lab, you will be able to:

- Work with tabs
- Start a new dashboard within tabs
- Use an automatic method to create a visualization
- Use Cognos Assistant to create a visualization
- Use a manual method to create a visualization

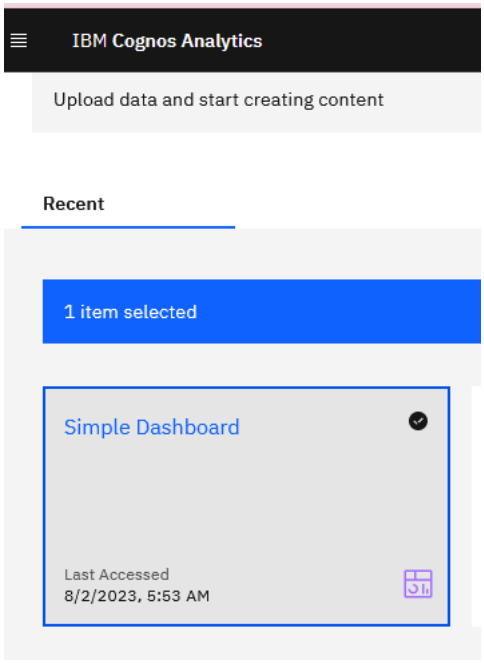
Exercise 1: Work with tabs and start a new dashboard within tabs

In this exercise, you will learn how to work with tabs and start a new dashboard within tabs.

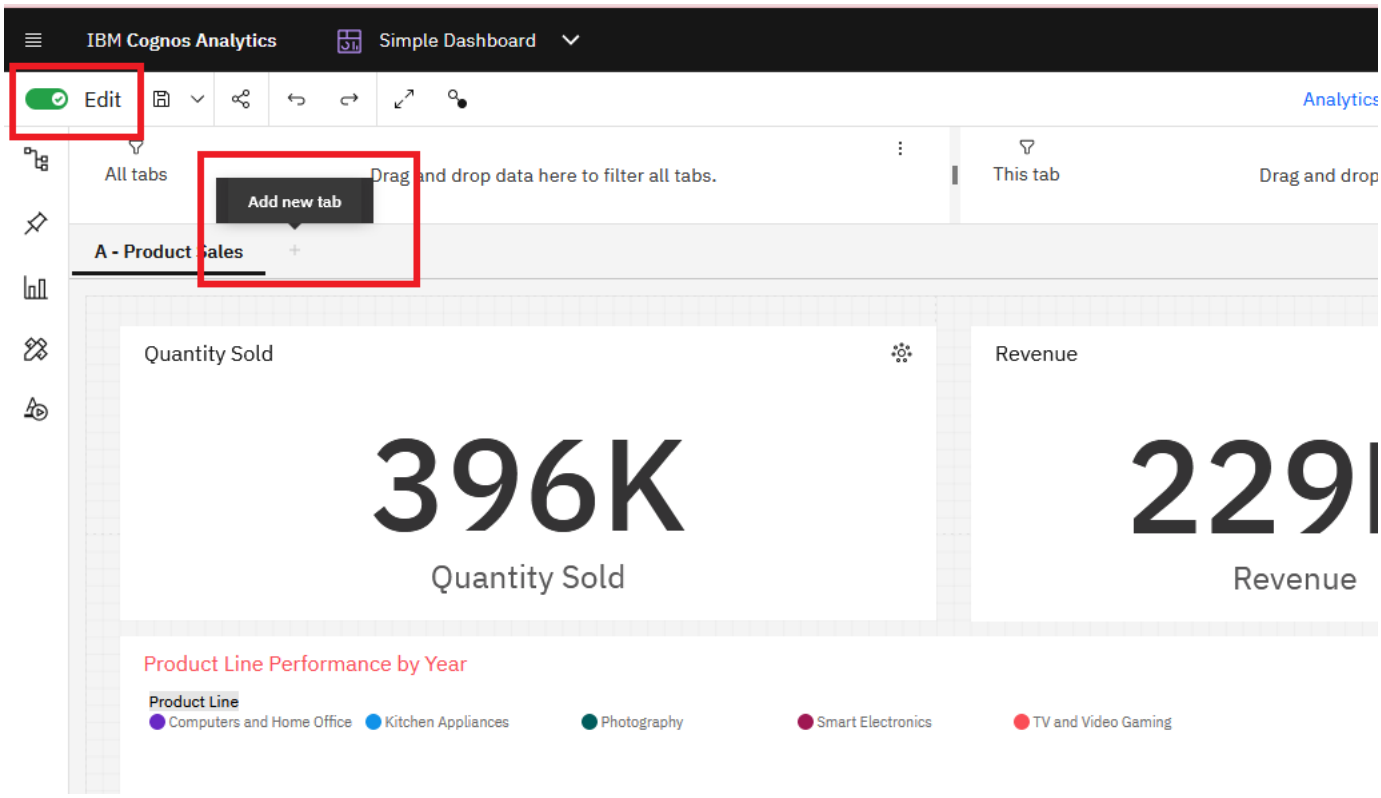
1. To sign in to the Cognos Analytics platform with your IBMid, go to myibm.ibm.com/dashboard/.
2. Enter your IBMid and password.
3. Scroll down and click **Launch**.



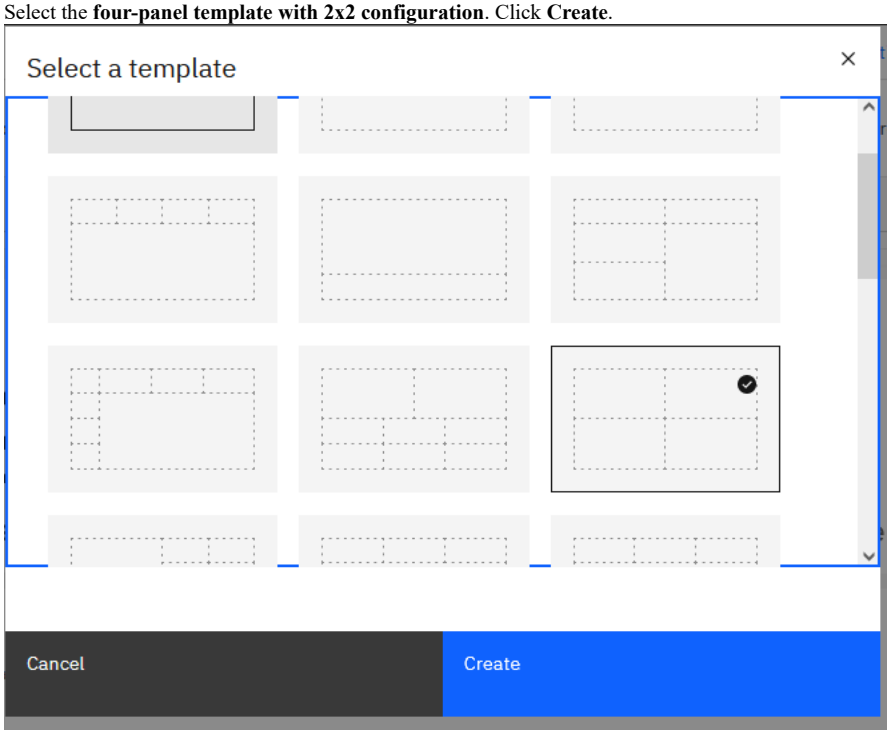
4. From the **Recent** section, double-click **Simple dashboard** to open it.



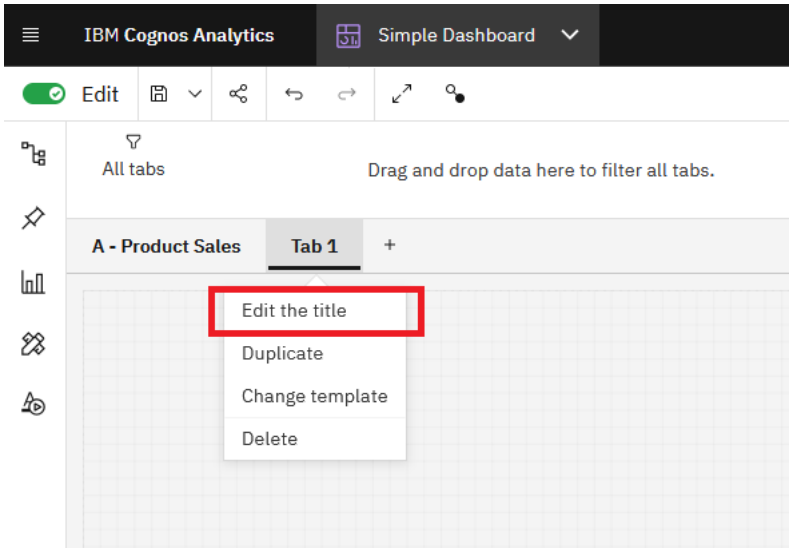
5. Ensure that **Edit** is turned on in the top left corner. Then click the **Add new tab** button to the right of the **A - Product Sales** tab.



6. Select the **four-panel template with 2x2 configuration**. Click **Create**.



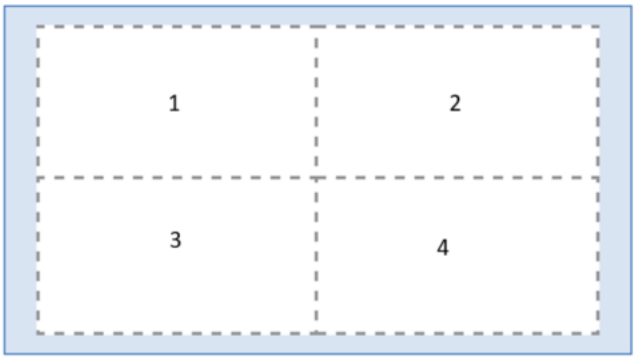
7. Click the tab named **Tab 1** and select **Edit the title**. Rename the tab to **B - Customer**.



Exercise 2: Differentm methods for creating dashboard visualizations

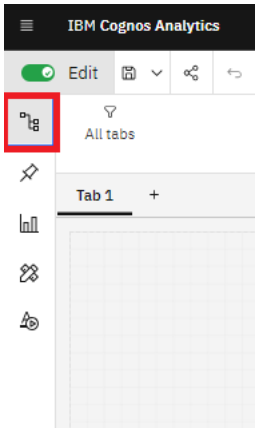
In this exercise, you will learn different methods for creating dashboard visualizations.

- As you build the dashboard, the location placement for widgets in the dashboard template will be referenced using the following panel numbers



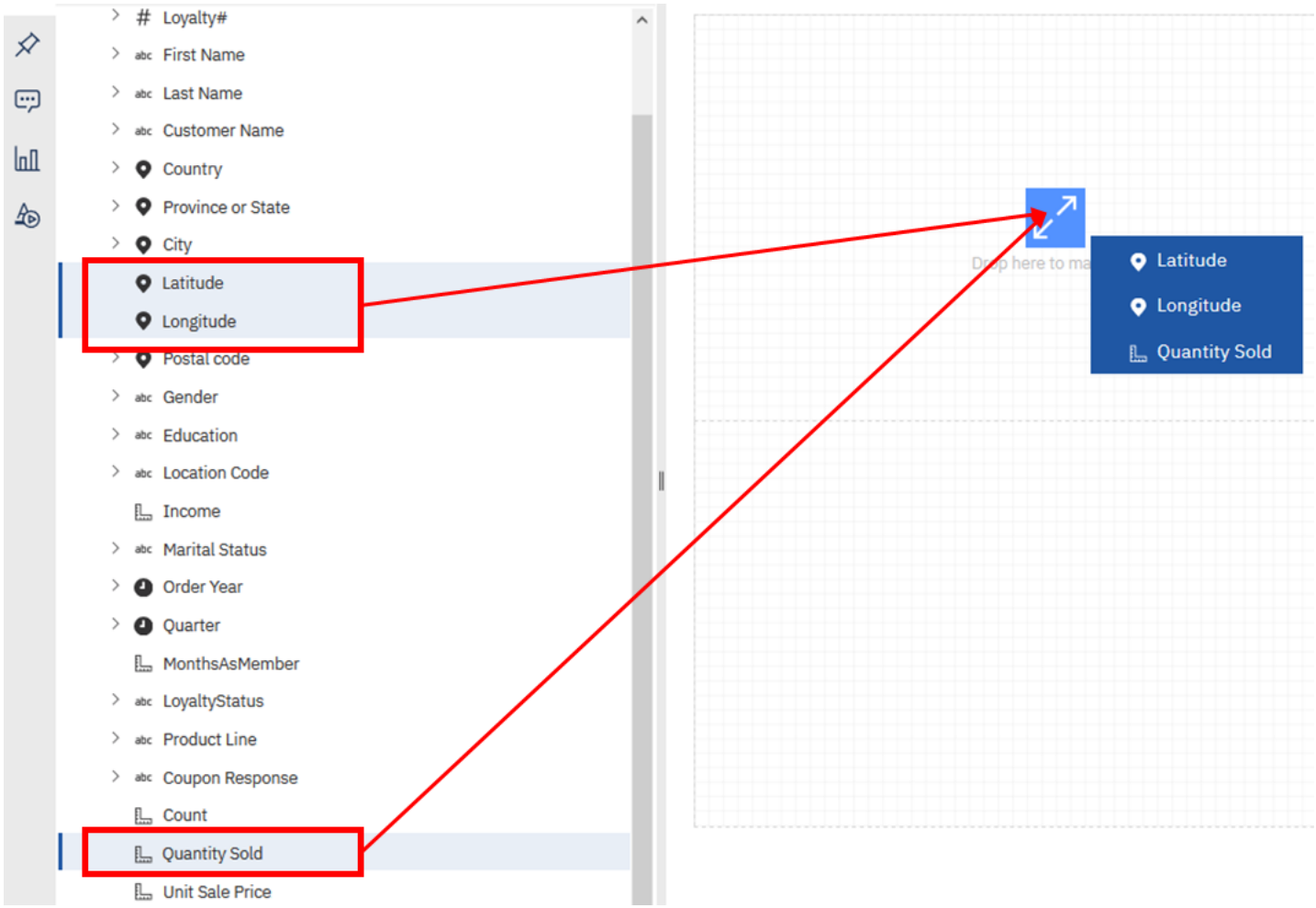
Task A: Using an automatic method to create a visualization for panel 1

1. From the **Navigation** panel, select **Sources** to open the data source panel if it is not already open. The data source panel displays the uploaded file **CustomerLoyaltyProgram.csv** as the selected source.

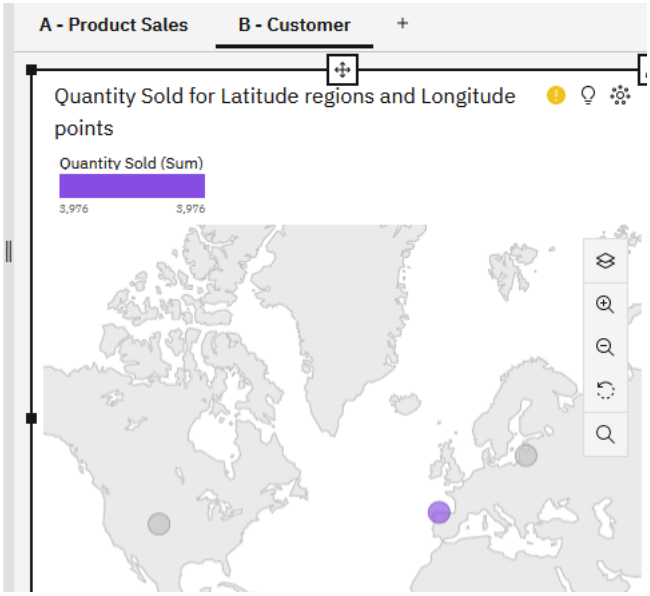


2. From the data source panel, expand CustomerLoyaltyProgram.csv if needed.

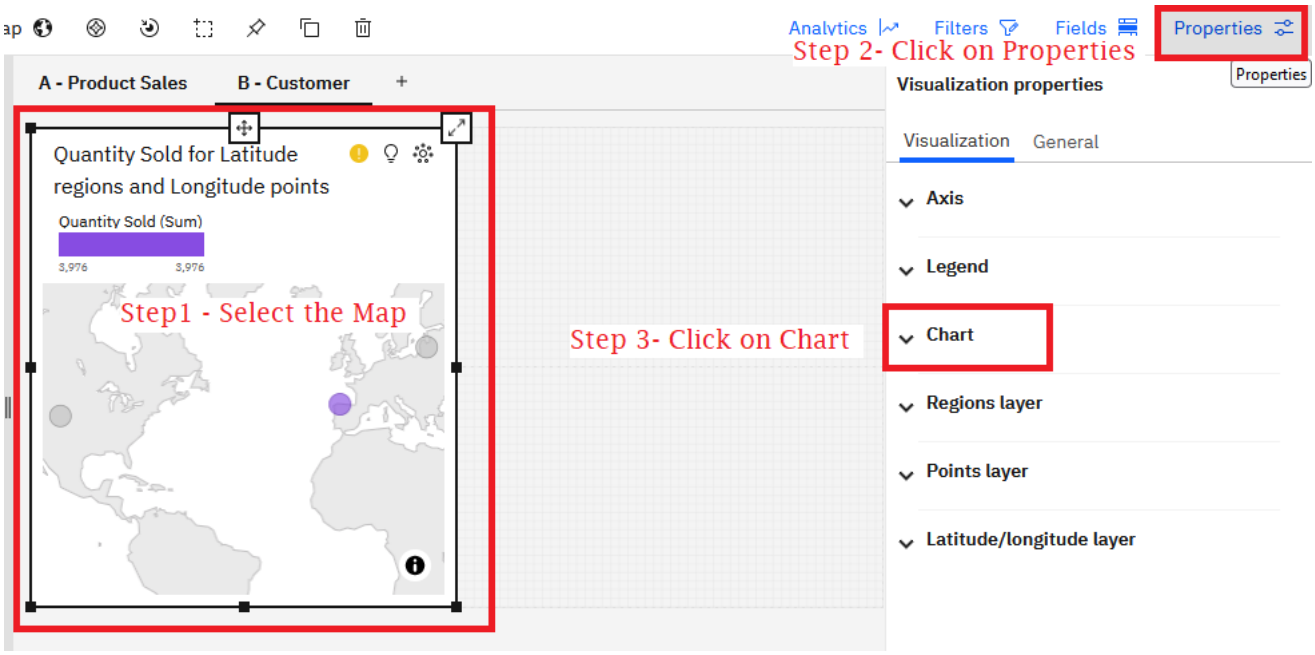
3. From the data source panel, press the **CTRL** key, select **Latitude**, **Longitude**, and **Quantity Sold** and drag them to the center of **Panel 1**, releasing them once you see the **drop zone turn blue**.



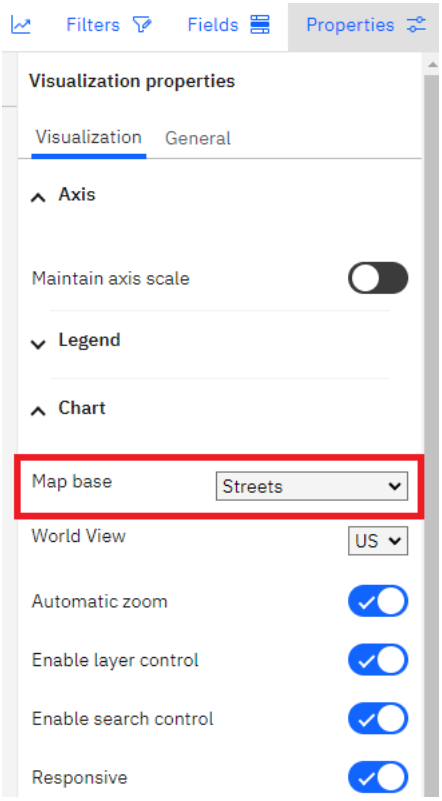
The map will look like the following:



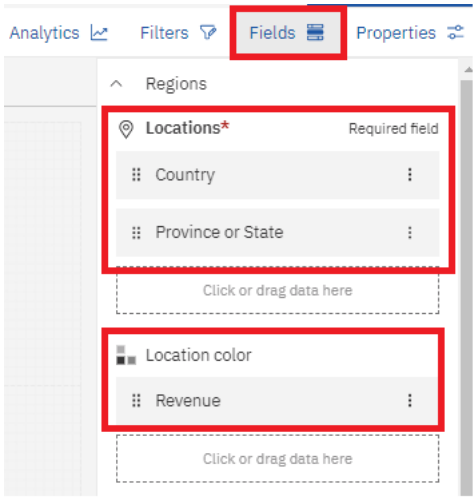
4. Click the map chart in Panel 1 to bring it into focus.
5. To change the map style, open the **Properties** panel and expand **Chart** to see the various options of maps available.



6. In the **Map base** list, select **Streets**.

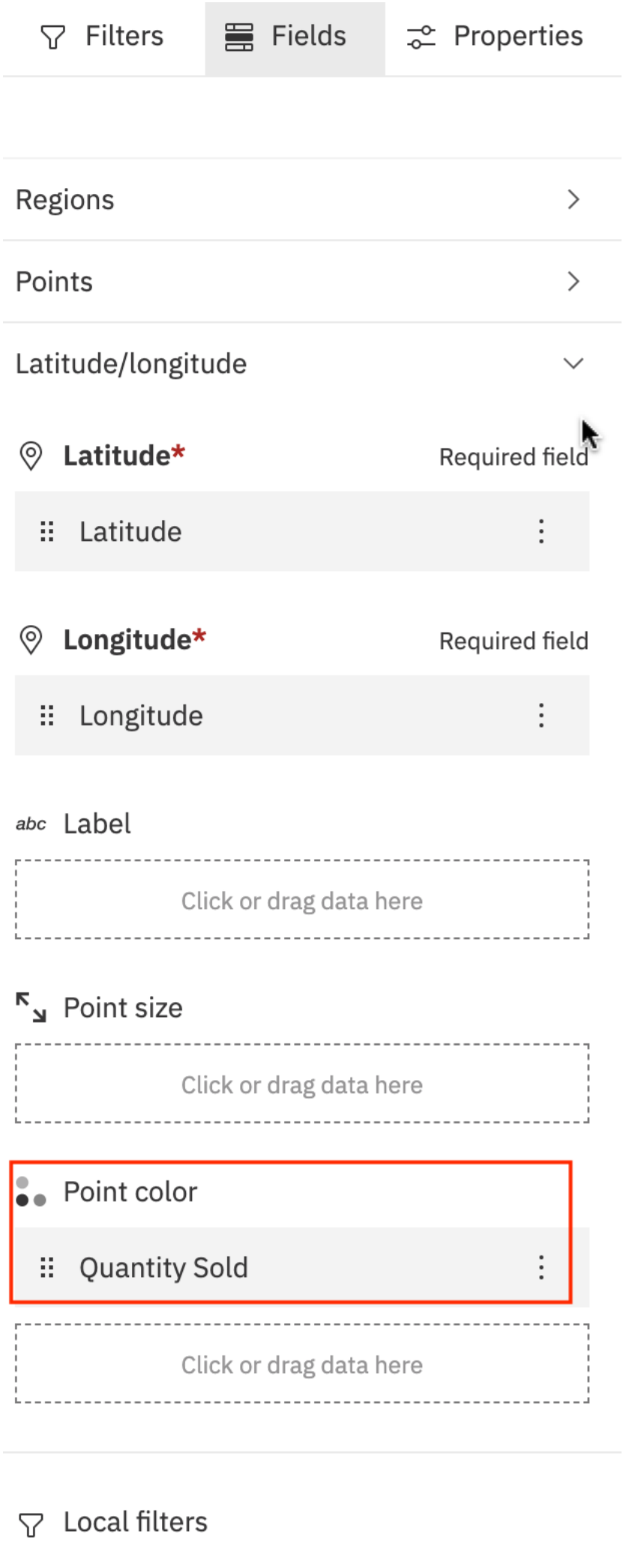


7. Open the **Fields** panel to view the data slots. From the data source panel on the left of the screen, drag and drop **Country**, **Province or State**, and **Revenue** into the **Locations**, **Locations**, and **Location color** data slots of the **Regions** section of the Fields panel respectively.

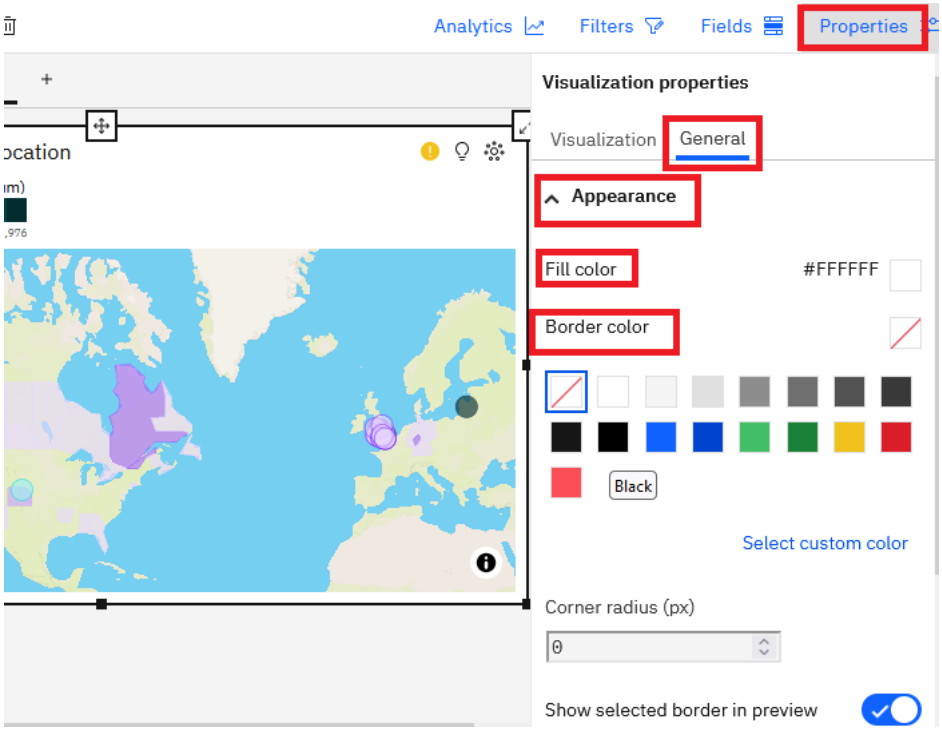


8. Expand the **Latitude/longitude** section of the Fields panel.

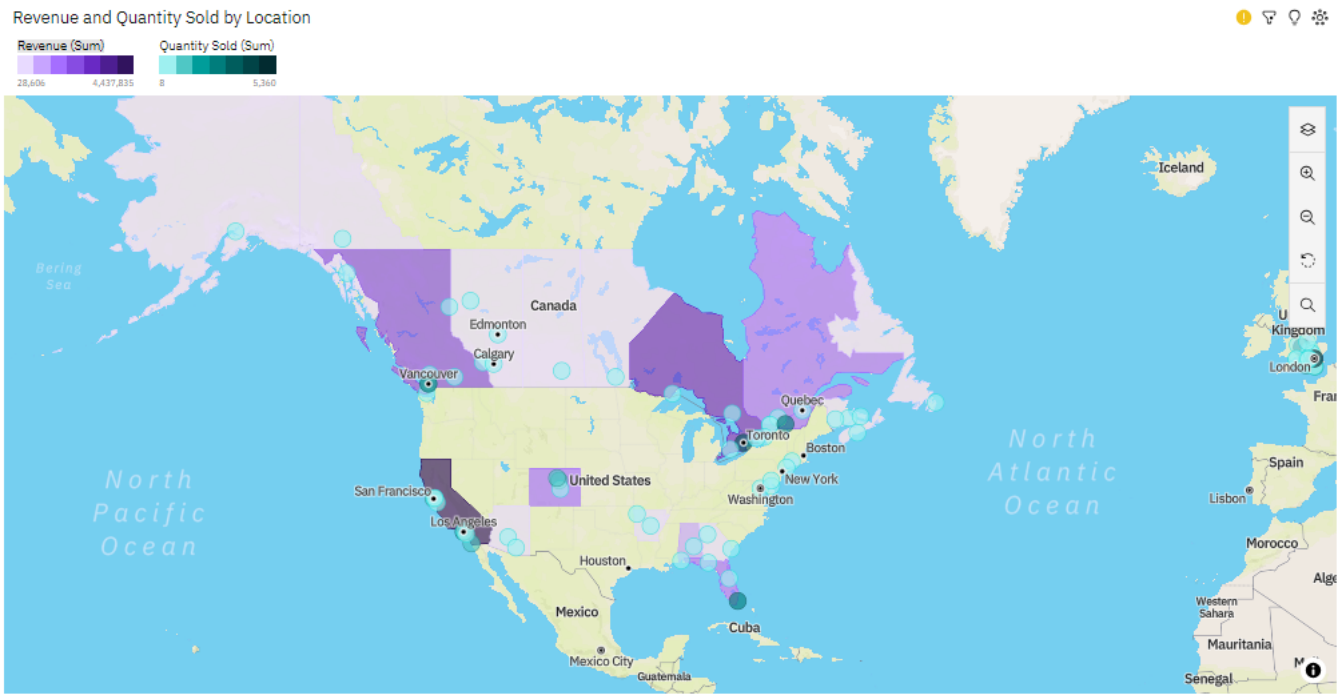
9. Ensure that **Quantity Sold** is in the **Point color** data slot of the **Latitude/longitude** section of the Fields panel.


Filters
Fields
Properties
Regions
Points
Latitude/longitude
Latitude*
Required field
Latitude
Longitude*
Required field
Longitude
abc
Label
Click or drag data here
Point size
Click or drag data here
Point color
Quantity Sold
Click or drag data here
Local filters

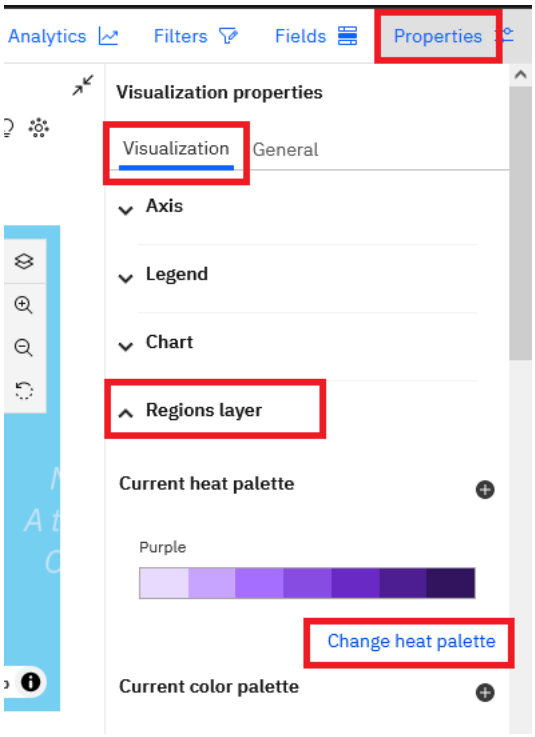
10. Click the **Fields** button to close the fields panel.
11. Click the map chart widget in Panel 1 to bring it into focus if needed. Select the title of the visualization and change it to *Revenue and Quantity Sold by Location*.
12. Click the **Properties** button in the top right corner to open the **Properties** panel and click the **General** tab. Expand **Appearance**, click **Border color** to open the color options for borders, and select a black border.



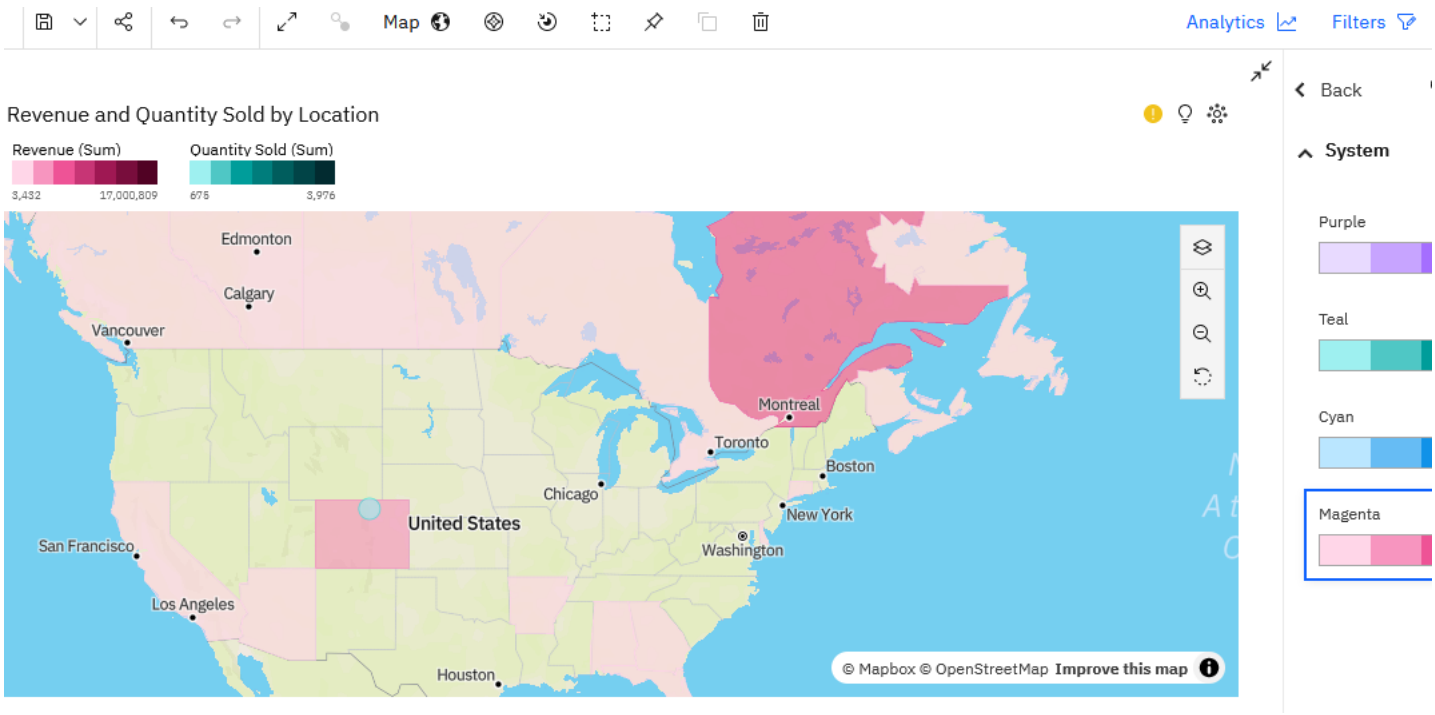
13. To save the current work of the dashboard, press **CTRL+S** or click the **Save** icon in the toolbar.
14. Ensure that the **Regions** section has the correct fields in the relevant data slots as per the image in step 7 above.
15. Your Panel 1 visualization should look similar to the one below:



You can also change the visualization color palette as below:

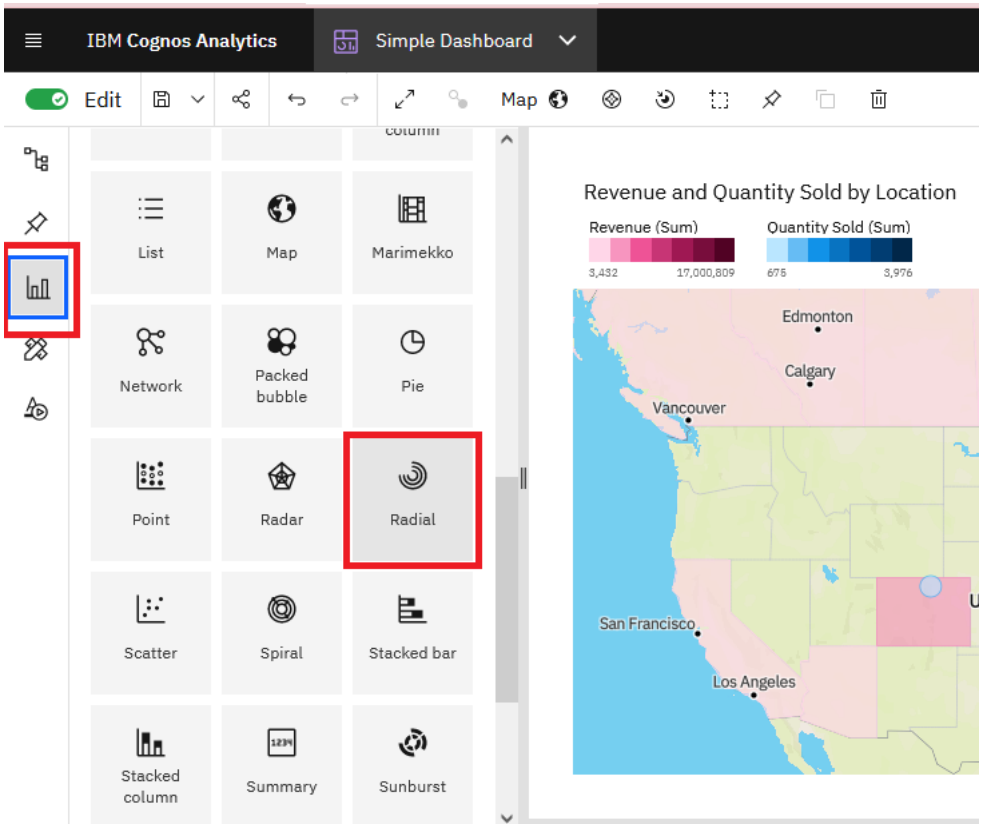


For instance, in the below image, we have selected a Magenta palette.

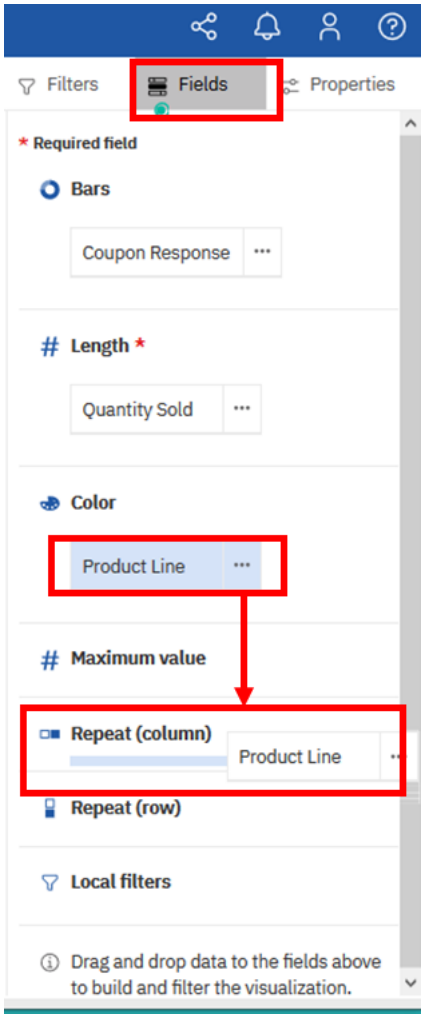


Task B: Using an automatic method to create a visualization for panel 2

1. From the **Navigation** panel, click **Visualizations** and then select **Radial** chart from the visualizations.



2. Click the **Fields** button on the dashboard toolbar to open the **Fields** panel.
3. Drag and drop **Product Line** to the **Repeat (column)** data slot.
4. Next, drag **Coupon Response** to the **Color** data slot. Also, drag **Coupon Response** to the **Bars** data slot, and then drag **Quantity Sold** to the **Length** data slot.
5. Click the **Fields** button to close the Fields panel.

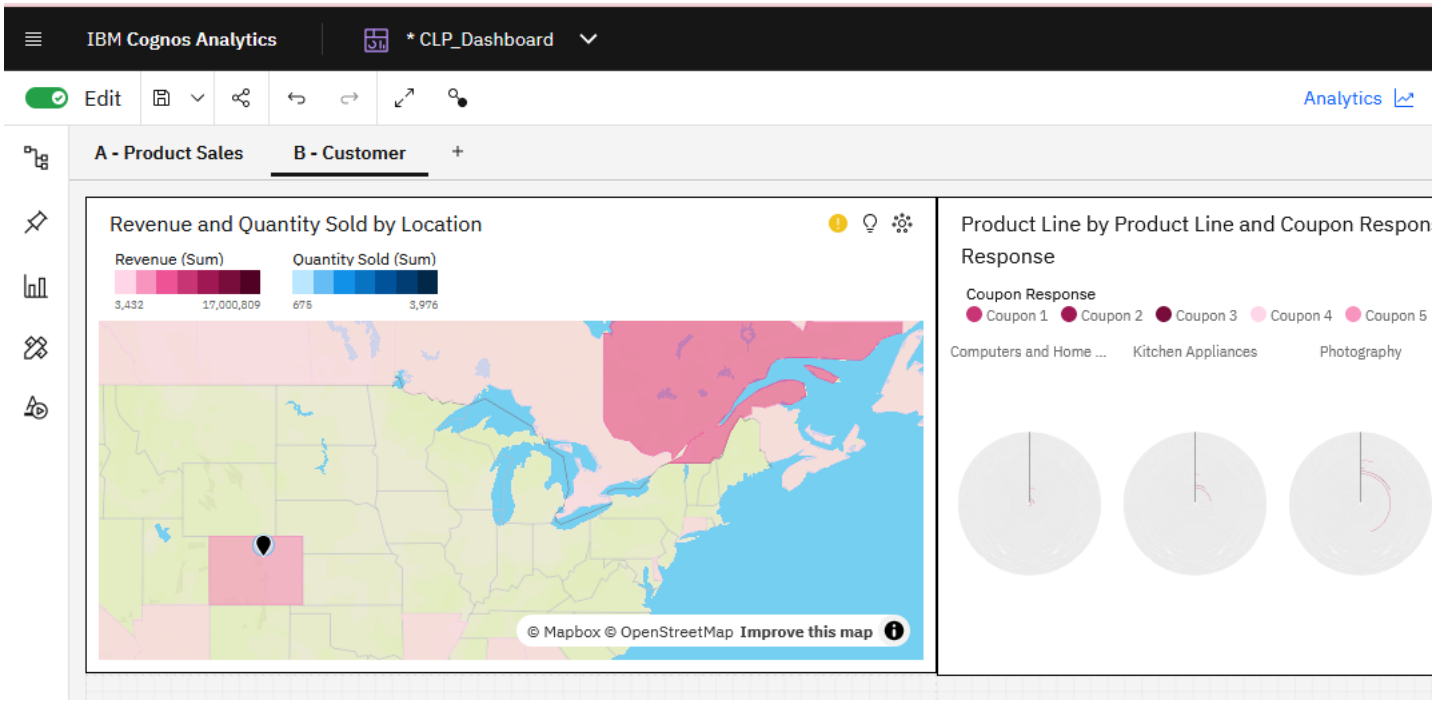


6. Click the radial chart widget in Panel 2 to bring it into focus if needed. Select the title of the visualization and change it to *Product Line by Product Line and Coupon Response colored by Coupon Response*.

7. Click the **Properties** button in the top right corner to open the **Properties** panel and click the **General** tab. Expand **Appearance**, click **Border color** to open the color options for borders, and select a black border.

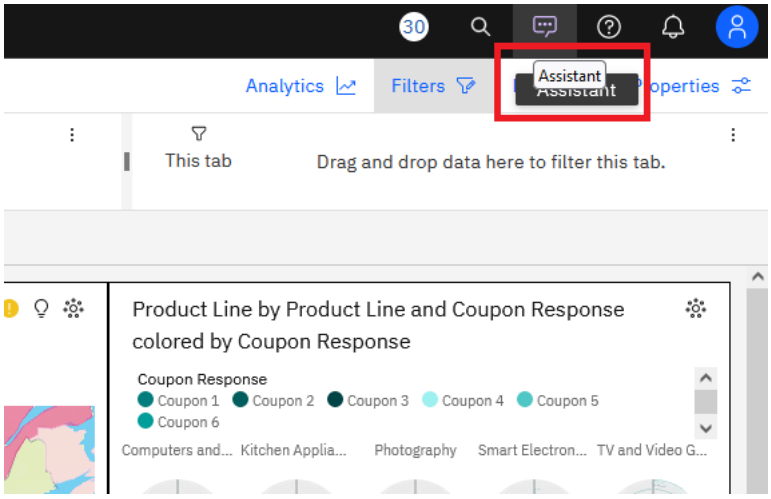
8. To save the current work of the dashboard, press **CTRL+S** or click the **Save** icon in the toolbar.

9. Your Panel 2 visualization should look similar to the one below:

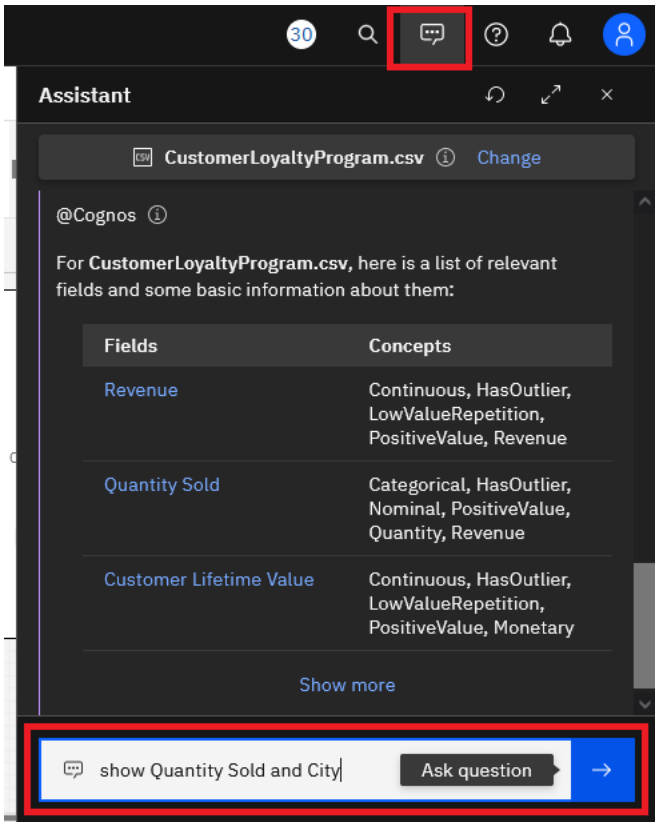


Task C: Using Cognos Assistant to create a visualization for panel 3

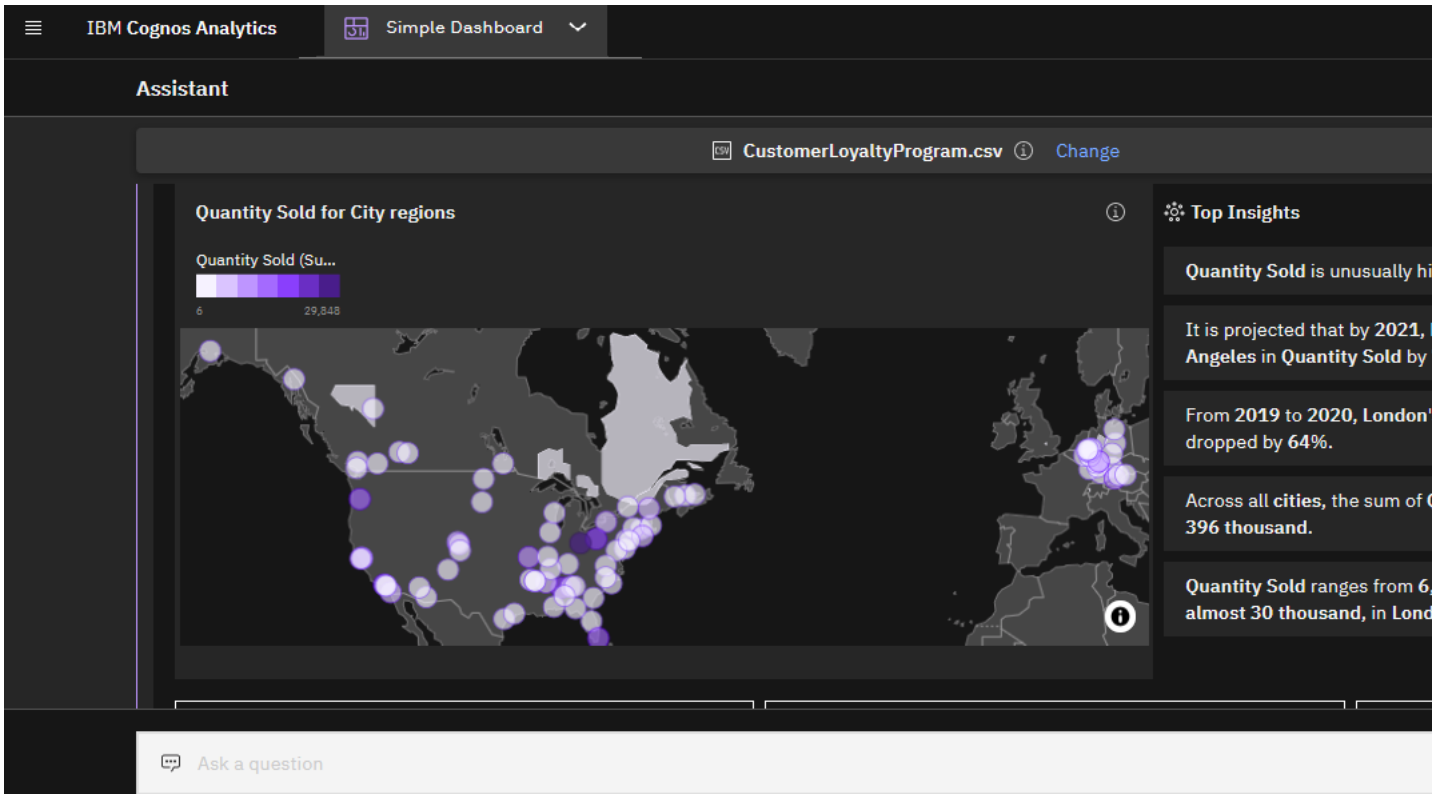
1. From the Cognos Analytics main toolbar at the top right of the screen, click the **Assistant** icon to open the **Cognos Assistant** panel.



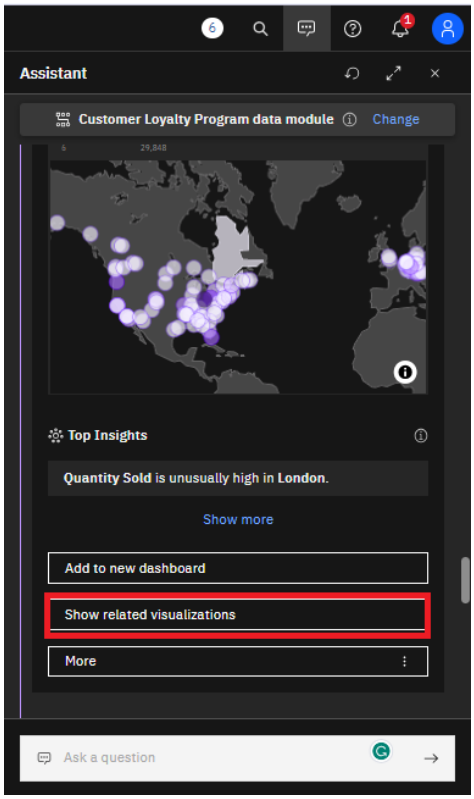
2. In the **Ask a question** input text box, at the bottom of the right hand pane, type *show Quantity Sold and City* and press **Enter** or click the **Ask question** arrow.



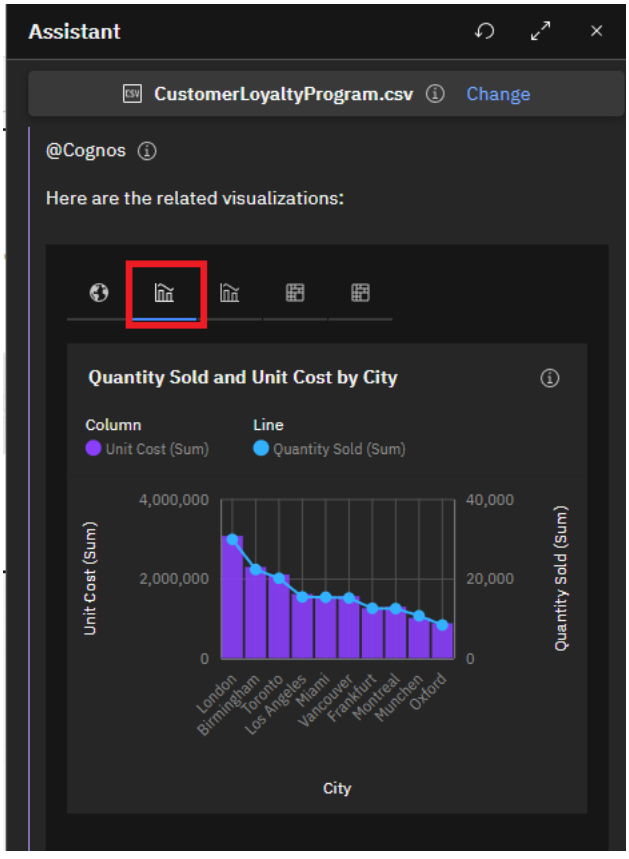
It will show you visualizations created automatically based on your question as below:



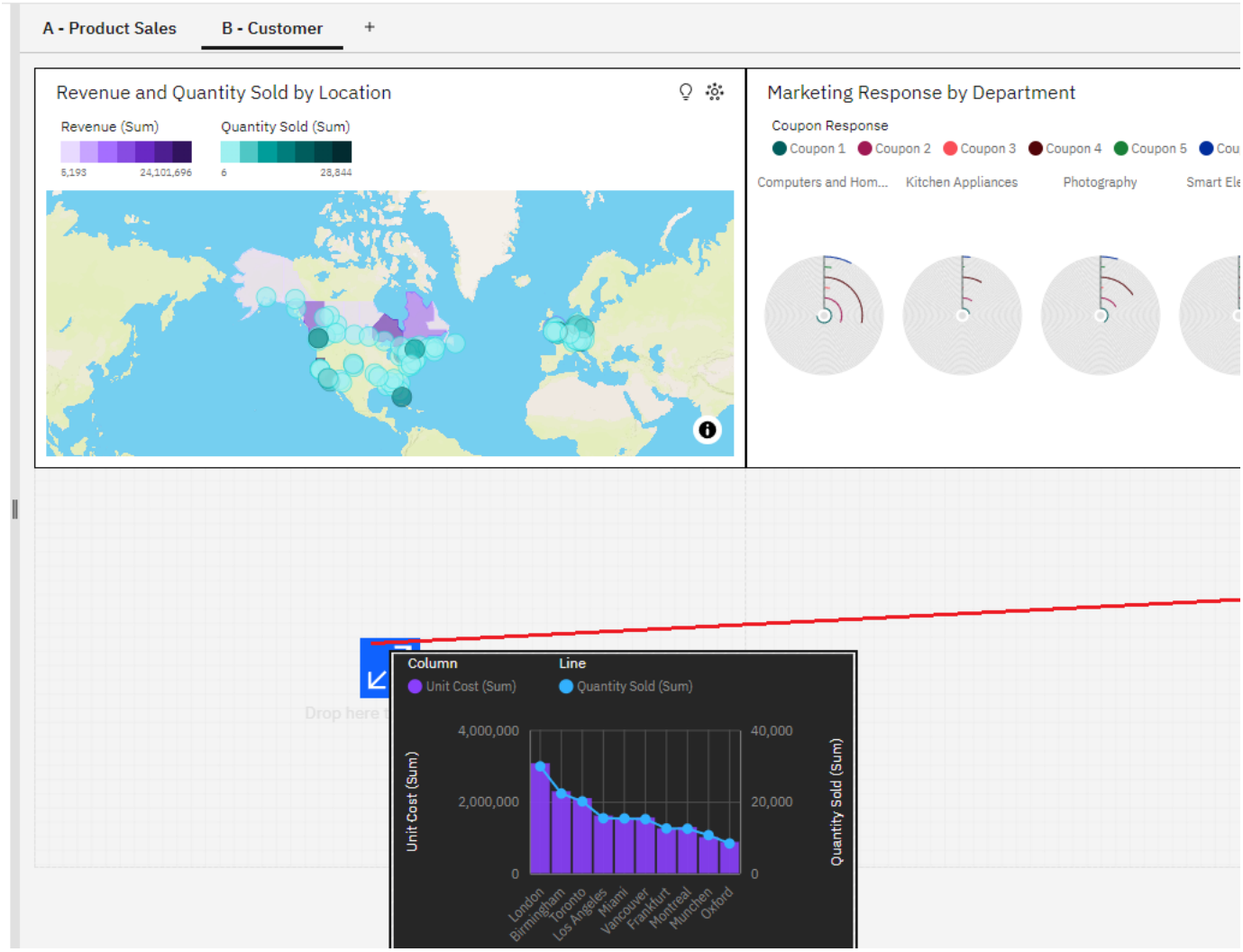
3. Scroll down the pane and click **Show related visualizations**.



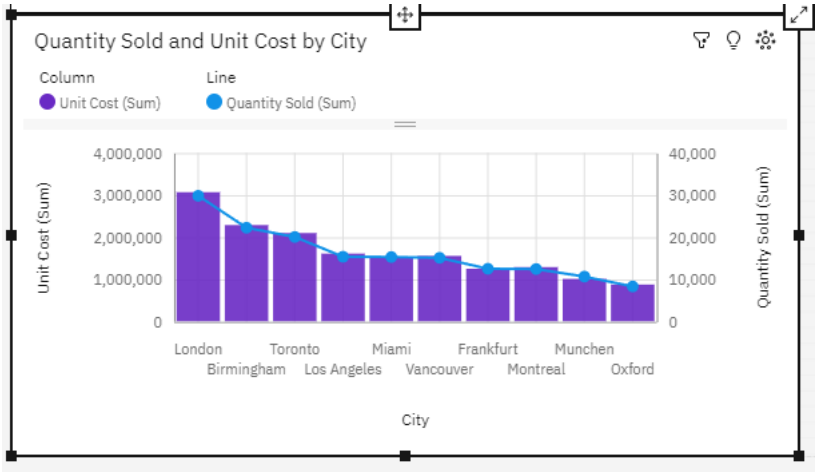
4. Select the second chart visualization.



5. From the **Cognos Assistant** panel, select the second chart visualization and drag it to the center of **Panel 3**, releasing it once you see the **drop zone turn blue**.

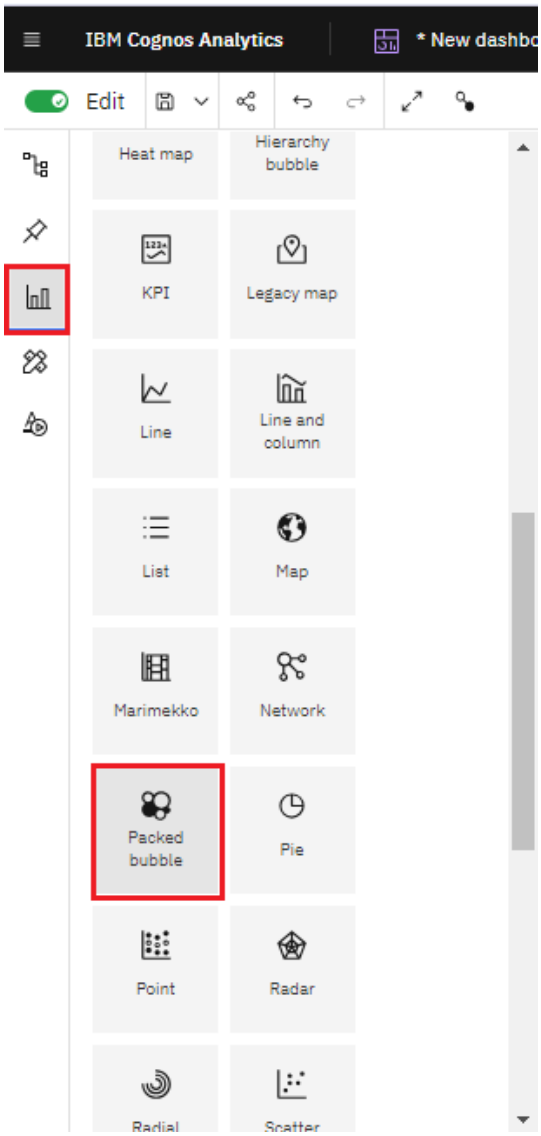


6. Click the **Quantity Sold and Unit Cost by City** chart in **Panel 3** to bring it into focus if needed.
7. Open the **Properties** panel and click the **General** tab. Expand **Appearance**, click **Border color** to open the color options for borders, and select a black border.
8. To save the current work of the dashboard, press **CTRL+S** or click the **Save** icon in the toolbar.
9. Your Panel 3 visualization should look similar to the one below:

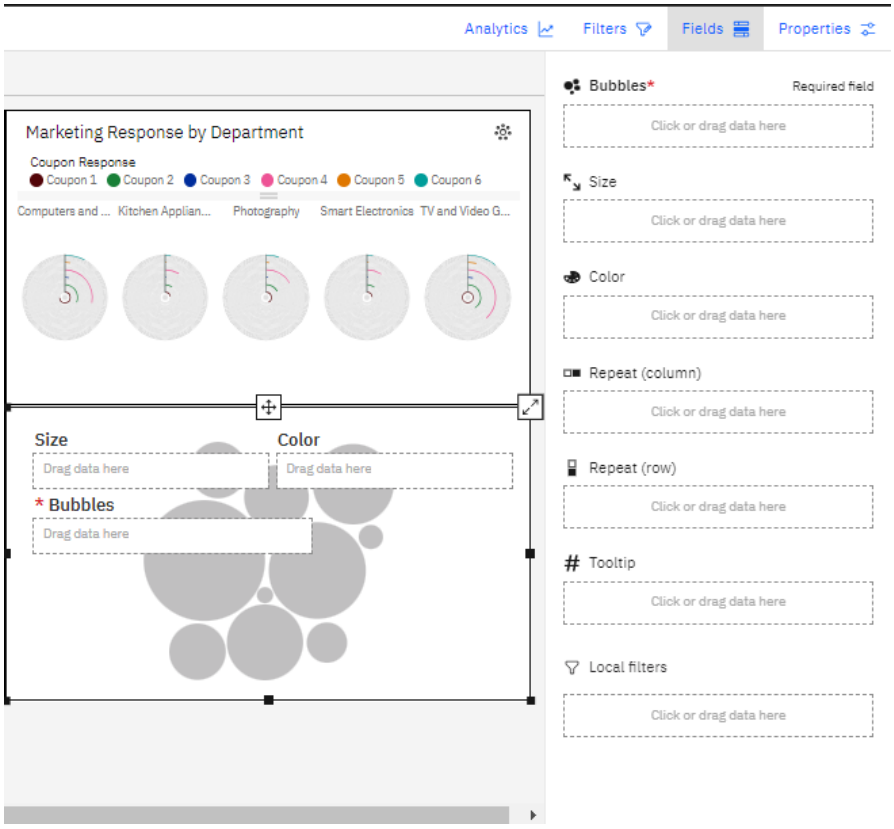


Task D: Using a manual method to create a visualization for panel 4

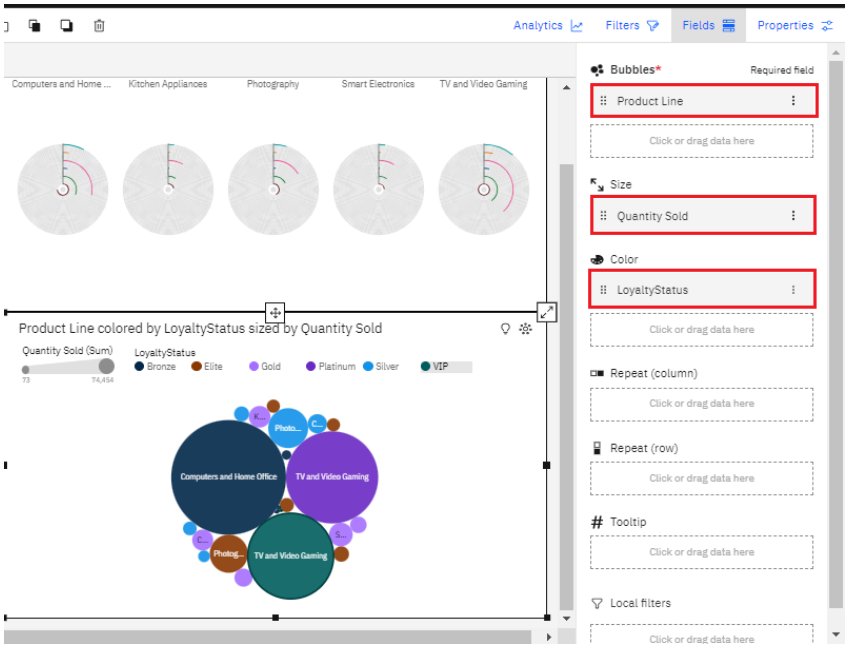
1. From the **Navigation** panel, select **Visualizations** to open the visualizations library.



2. Select the **Packed Bubble** chart from the list.
3. The packed bubble chart visualization will be added to Panel 4 of the dashboard template, and its **Fields** panel will be open, ready for you to set up the data definitions for your visualization.



4. From the data source panel on the left of the screen, drag and drop the **Product Line**, **Quantity Sold**, and **Loyalty Status** sources into the **Bubbles**, **Size**, and **Color** data slots of the Fields panel respectively.



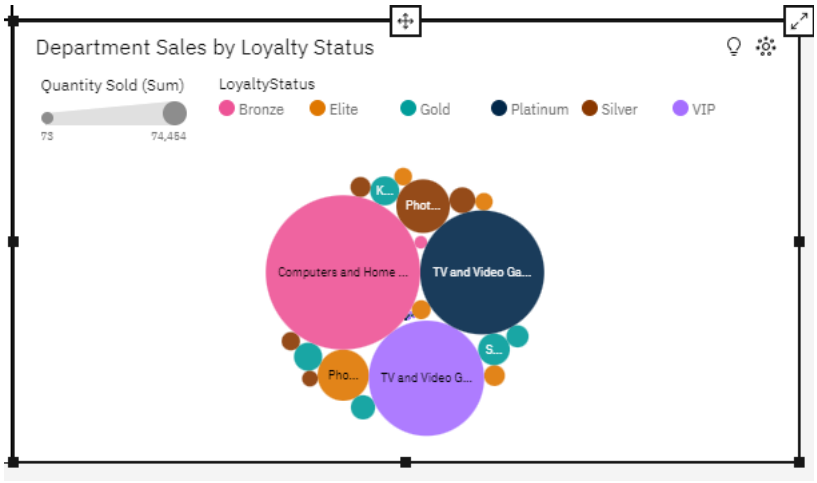
5. Click the **Fields** button to close the panel.

6. Click the packed bubble chart visualization in Panel 4 to bring it into focus. Select the title of the visualization and change it to *Department Sales by Loyalty Status*.

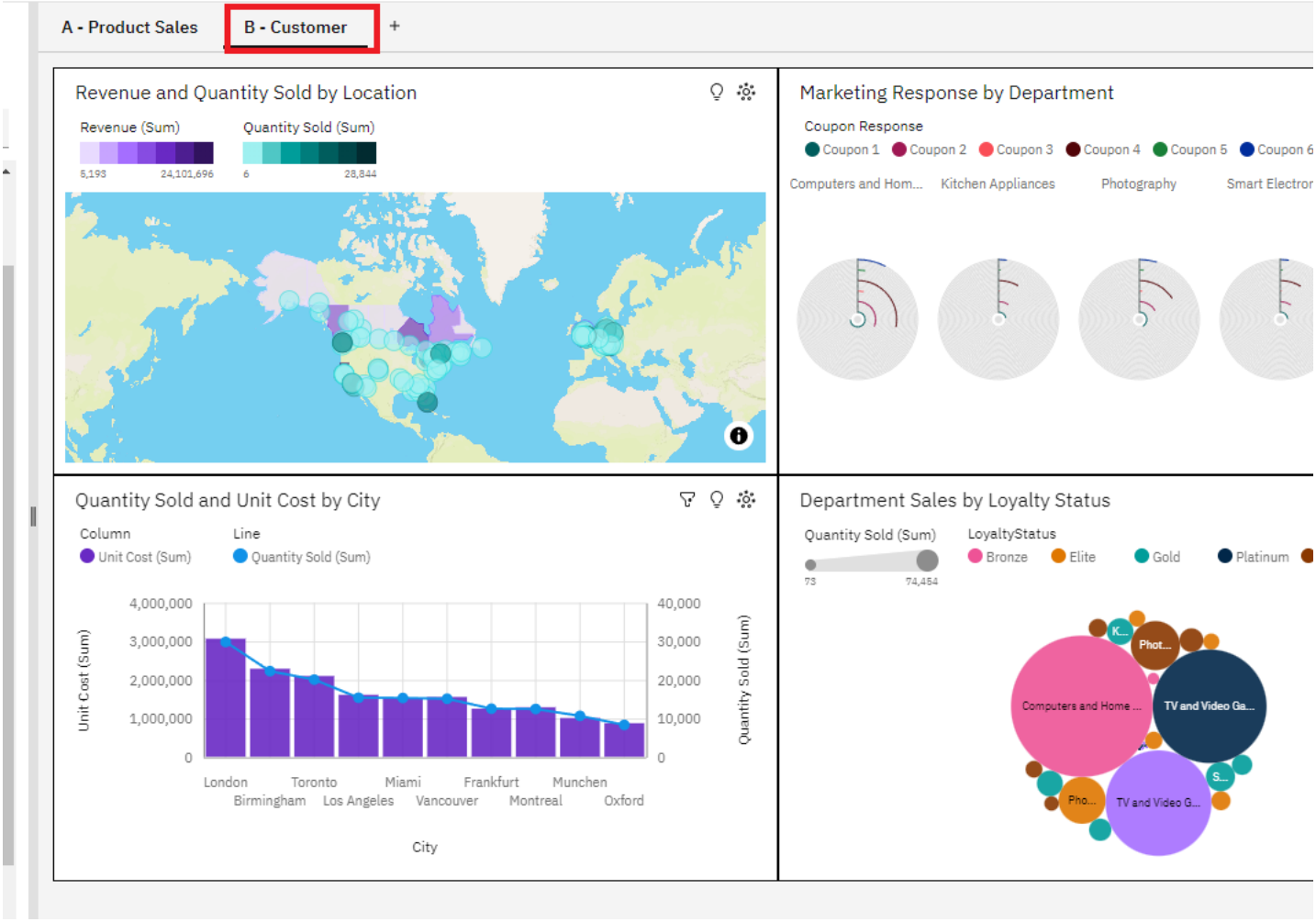
7. Open the **Properties** panel and click on the **General** tab. Expand **Appearance**, click **Border color** to open the color options for borders, and select a black border.

8. To save the current work of the dashboard, press **CTRL+S** or click the **Save** icon in the toolbar.

9. Your Panel 4 visualization should look similar to the one below:



Finally, your dashboard **B - Customer** should look similar to the one below:



Congratulations! You have completed this lab, and you are ready for the next topic.

Author(s)

- Sandip Saha Joy

Other Contributor(s)

- Steve Ryan
- Dr. Pooja

Changelog

Date	Version	Changed by	Change Description
2023-08-18	1.8	Steve Hord	QA review with minor edits
2023-08-07	1.7	Steve Ryan	Peer review - updated screenshots, fixed markdown tags/typos
2023-08-02	1.6	Dr. Pooja	Updated screenshots included Appearance and visual effects
2023-07-11	1.5	Pooja Patel	Updated screenshots and Instruction
2022-10-28	1.4	Pratiksha Verma	Updated screenshots
2021-06-18	1.3	Malika Singla	Updated screenshots
2020-09-23	1.2	Steve Ryan	Post review changes
2020-09-21	1.1	Steve Ryan	ID review
2020-09-17	1.0	Sandip Saha Joy	Initial version created