

Hands-on Lab: Creating Visualizations Using Cognos Analytics

Estimated time needed: 1hr 15 mins

In this lab, you will create some visualizations and add them to a dashboard using Cognos Analytics.

Software Used

The hands-on lab will use the trial version of Cognos Analytics from IBM.

Dataset Used

The dataset used in this lab comes from [here](https://developer.ibm.com/terms/ibm-developer-terms-of-use/) in the **IBM Accelerator Catalog**. The Terms of use for such are located at <https://developer.ibm.com/terms/ibm-developer-terms-of-use/>.

We are using a modified subset of that dataset for the lab, so to follow the lab instructions successfully, please use the dataset provided with the lab, rather than the dataset from the original source.

Assignment Scenario

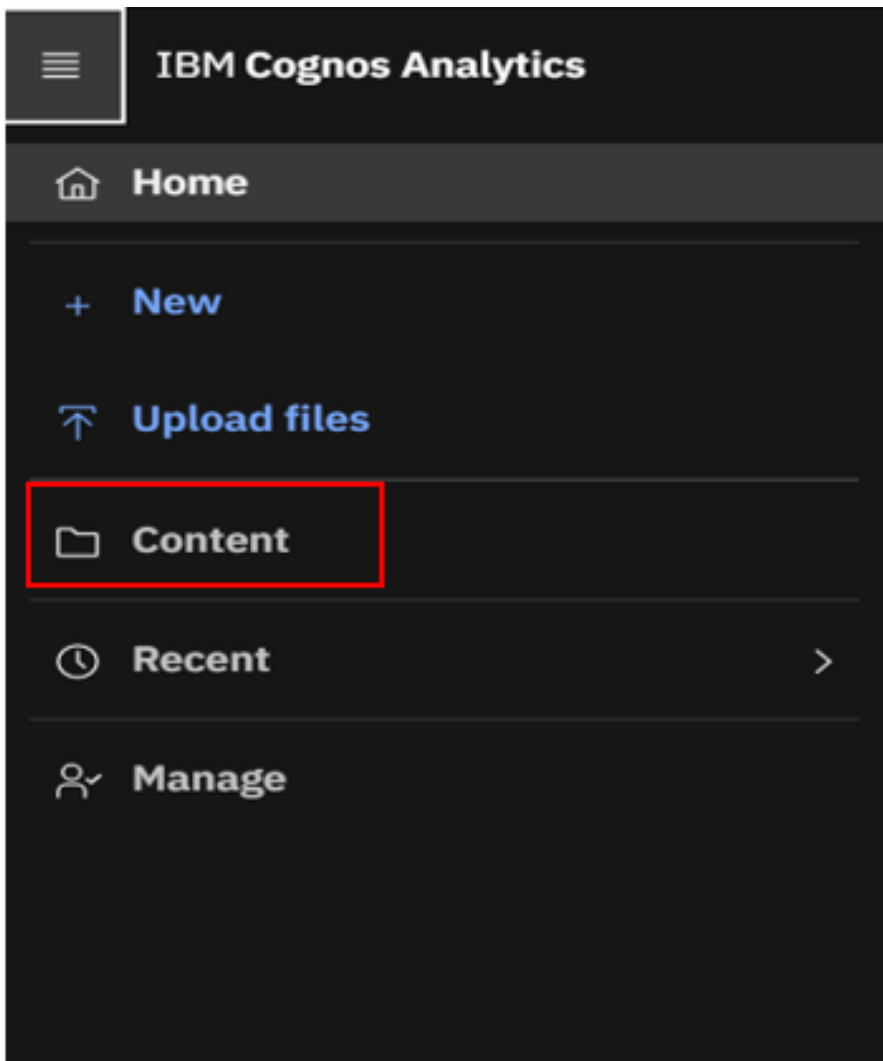
As a regional manager for a chain of car dealerships you need to build out a dashboard to allow you to understand your sales and service departments.

Accessing the Dataset for this Final Assignment

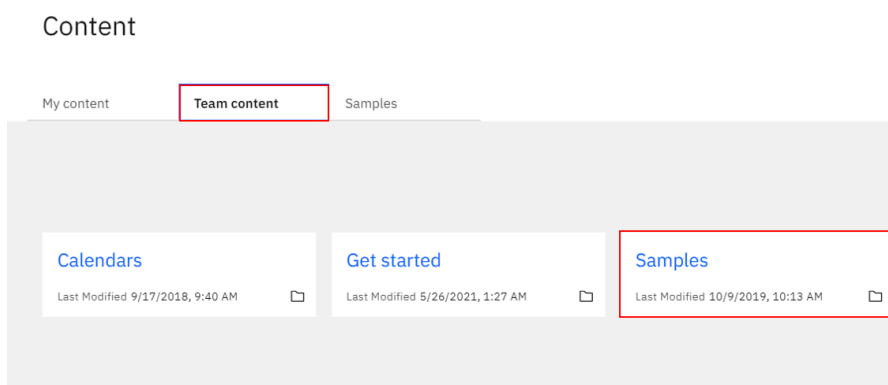
The dataset used in this final assignment is provided as sample data within your Cognos environment, in a data module called **Auto group data module**.

To load and open the data module:

1. On the **navigation panel** of Cognos Analytics, select **Team content**.

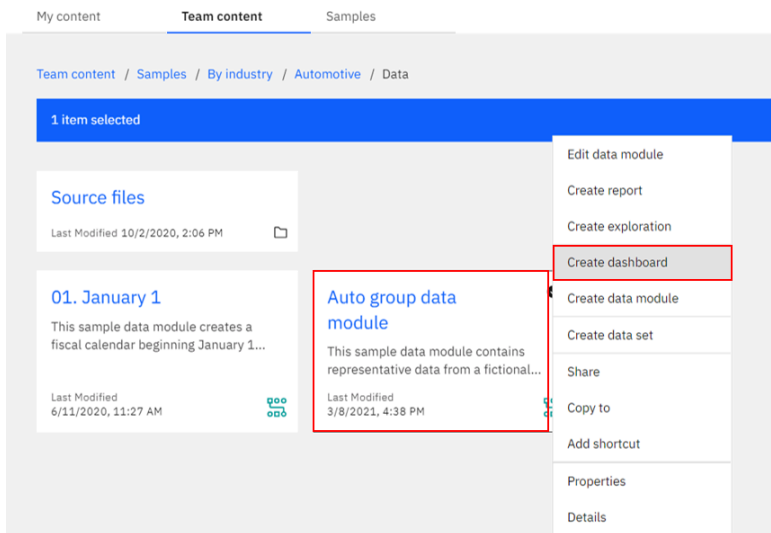


Then select **Samples**.



2. Now go to **By industry > Automotive > Data**.

3. Here the sample data used in this final assignment can be found, in a data module called **Auto group data module**. Right-click on **Auto group data module** and select **Create Dashboard**.

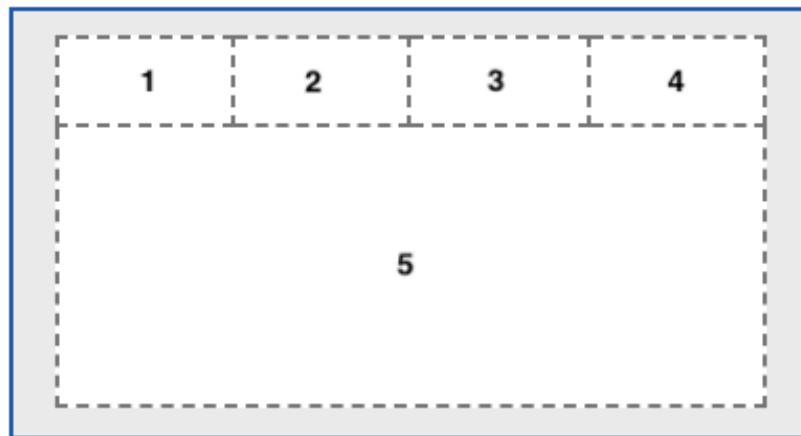


Guidelines for the Submission

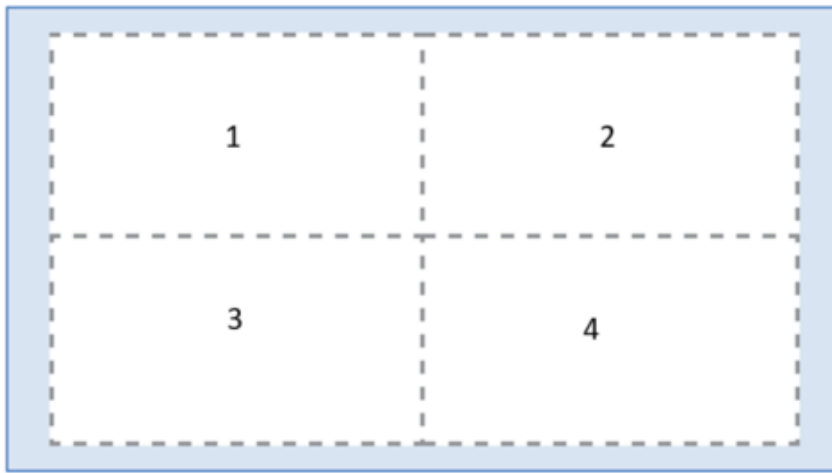
Use the IBM Cognos Analytics-related course videos and hands-on lab *Creating Dashboards Using IBM Cognos Analytics* to help you complete the following tasks:

Create two dashboards as follows:

- One dashboard using the tabbed template that has 4 small rectangles at the top and a large rectangle below - rename this dashboard tab to **Sales**.



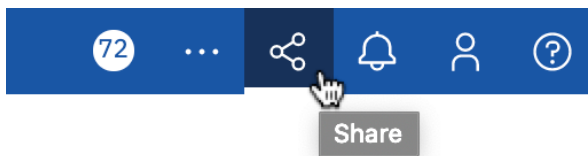
- One dashboard using the 2 x 2 rectangle areas tabbed template - rename this dashboard tab to **Service**.



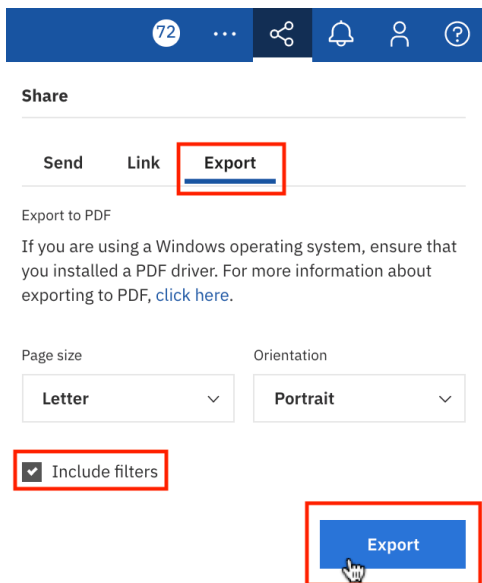
Capture the following KPI metrics as visualizations:

1. On the **Sales** dashboard, capture the following KPI metrics:
 - In the first small rectangle (**Panel 1**), capture **Profit** (formatted to 1 decimal place in millions of US dollars)
 - In the second small rectangle (**Panel 2**), capture **Quantity sold**
 - In the third small rectangle (**Panel 3**), capture **Quantity sold by model** (as a bar chart)
 - In the fourth small rectangle (**Panel 4**), capture **Average quantity sold**
2. On the **Sales** dashboard in the large rectangle (**Panel 5**), display *Profit by Dealer ID* as a column chart, sorted in ascending order.
3. On the **Service** dashboard, capture the following KPI metrics as visualizations:
 - In the top left area (**Panel 1**), capture the number of recalls per model of car (as a column chart)
 - In the top right area (**Panel 2**), capture the customer sentiment by comparing positive, neutral, and negative reviews (as a treemap)
 - In the bottom left area (**Panel 3**), capture the quantity of cars sold per month compared to the profit (as a line and column chart).
 - In the bottom right area (**Panel 4**), capture the number of recalls by model and affected system (as a heat map). This will help us understand if there are any outliers for a given model or a specific system.
4. To export your dashboard as a PDF, follow instructions below:

- On the application toolbar of your **dashboard page**, click **Share** icon.

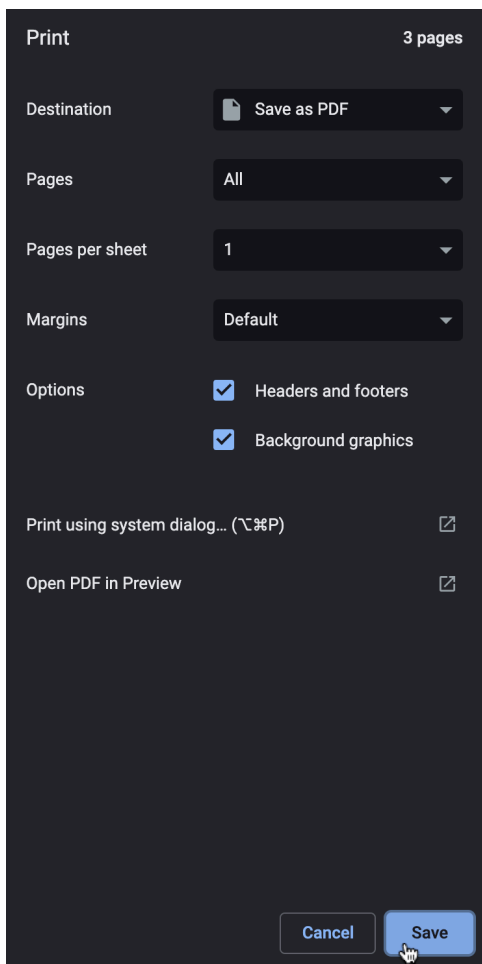


- On the **Export** tab, check **Include filters** and click **Export**.



The screenshot shows a top navigation bar with a blue background and white icons: a circle with '72', a three-dot menu, a share icon, a bell, a user profile, and a help icon. Below this is a 'Share' section with three buttons: 'Send', 'Link', and 'Export'. The 'Export' button is highlighted with a red rectangle. Below the buttons, there is a section titled 'Export to PDF' with a paragraph of text: 'If you are using a Windows operating system, ensure that you installed a PDF driver. For more information about exporting to PDF, [click here](#).' Below this text are two dropdown menus: 'Page size' set to 'Letter' and 'Orientation' set to 'Portrait'. Below these is a checkbox labeled 'Include filters' which is checked and highlighted with a red rectangle. At the bottom is a blue 'Export' button with a white cursor icon pointing at it, also highlighted with a red rectangle.

- On the **Print** pop-up page, in the **Destination** drop-down list, select **Save as PDF**.



The screenshot shows a 'Print' dialog box with a dark background. At the top, it says 'Print' and '3 pages'. Below this are several settings: 'Destination' is set to 'Save as PDF' (highlighted with a red rectangle), 'Pages' is set to 'All', 'Pages per sheet' is set to '1', and 'Margins' is set to 'Default'. Under 'Options', there are two checked checkboxes: 'Headers and footers' and 'Background graphics'. At the bottom, there are two links: 'Print using system dialog... (⌘P)' and 'Open PDF in Preview'. At the very bottom are two buttons: 'Cancel' and 'Save' (highlighted with a red rectangle and a white cursor icon).

- Save the PDF file on your local machine to any location you like (preferably your **Downloads** folder) for later upload and submission to the coursera platform.

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