



# Hands-on Lab 5: Different Methods for Creating Dashboard Visualizations with Cognos Analytics

**Estimated time needed:** 45 minutes

In this lab, first you will learn how to work 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 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. Source:

<https://www.ibm.com/cloud/garage/dte/tutorial/ibm-cognos-analytics-1113-getting-started-exploration-0>. 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/](https://myibm.ibm.com/dashboard/).
2. Enter your IBMid and password.
3. Scroll down and click **Launch**.

# Products

## Trials

1 Offering



### IBM Cognos Analytics on Cloud - Trial

**Active**  
Expires on Oct 16, 2020

LaunchManage

4. From the **Recent** section, click **Simple dashboard**.

**Get started****Recent**

### Simple dashboard

Last Modified  
6/17/2021, 7:00 AM

### CustomerLoyaltyProg...

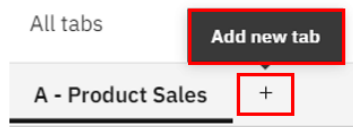
Last Modified  
6/17/2021, 6:43 AM

CSV

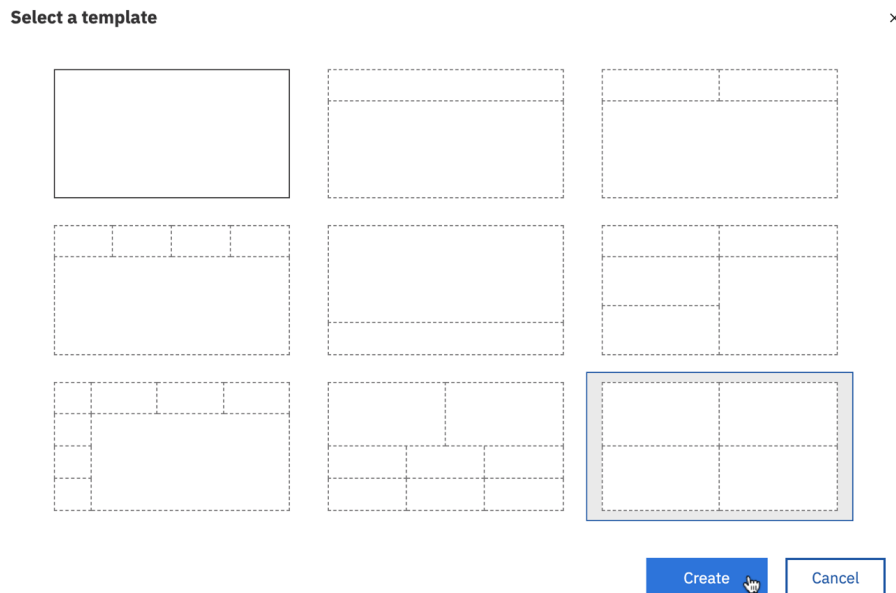
5. Click **Edit or preview** at the top left corner.



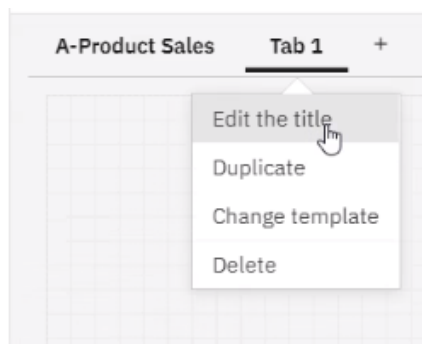
6. Click the **Add new tab** button to the right of the Dashboard A tab.



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



8. Click on the tab name **Tab 1** to bring up the Tab's on-demand toolbar. Select the **Edit**.

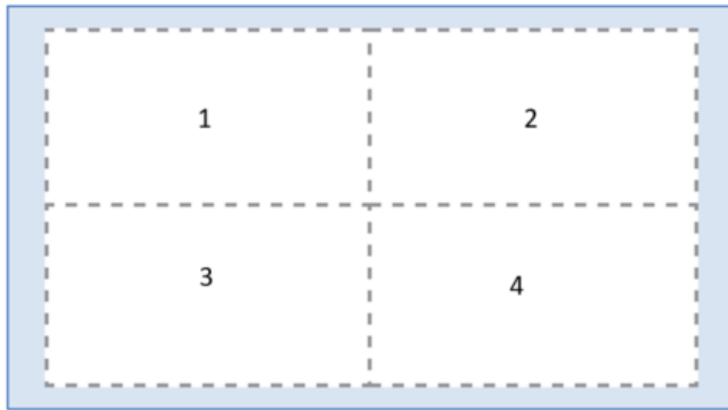


9. **Rename** the tab to "B - Customer".

## Exercise 2 : Different Methods for Creating Dashboard Visualization

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

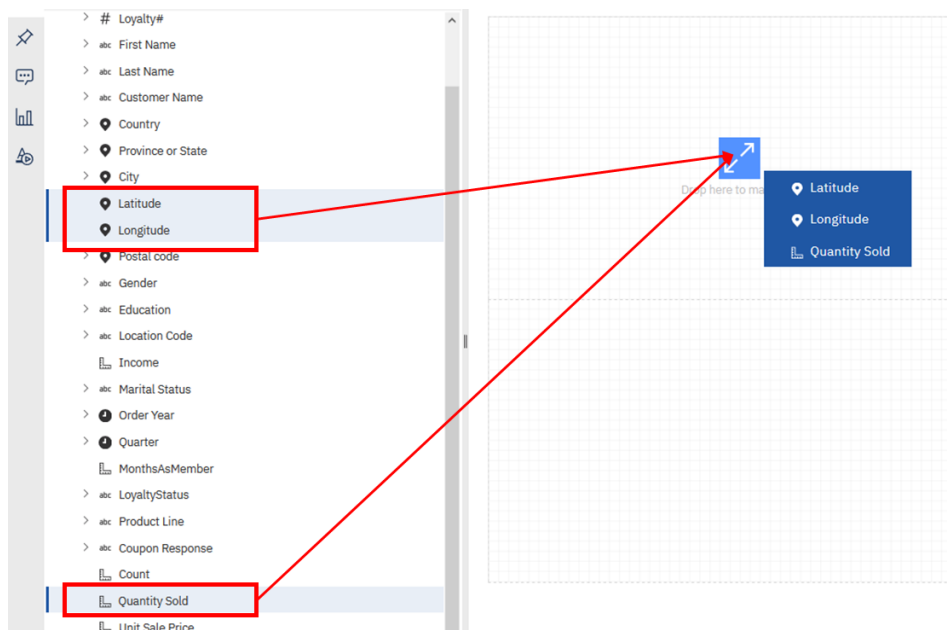


## Task A : Using an Automatic Method to Create a Visualization for Panel 1

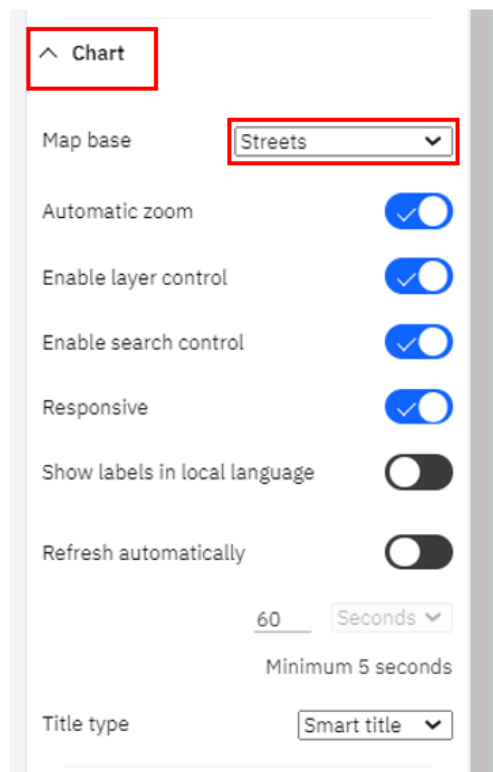
1. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the uploaded file "**CustomerLoyaltyProgram.csv**" as the Selected Source.



2. From the **Data Source** panel, expand CustomerLoyaltyProgram.csv, if needed.
3. From the **Data Source** panel, press **CTRL** and select **Latitude**, **Longitude**, **Quantity sold** and drag them to the center of **Panel 1**, releasing them once you see the **drop zone** turn blue.



- Click on the **Map chart in panel 1** to bring it into focus.
- To change the map style, open the **Properties** panel and click the **down arrow next to Chart** to see the various options of maps available. Select **Streets** for **Style**.



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

Filters

Fields

Properties

\* Required field

Regions

Locations \*

Country

...

Province or State

...

Location color

Revenue

...

> Points

> Latitude/longitude

Local filters

① Drag and drop data to the fields above to build and filter the visualization.

7. Make sure to drag and drop the **Quantity Sold** into **Point color** data slot of **Latitude/longitude** of the Fields panel if needed.

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

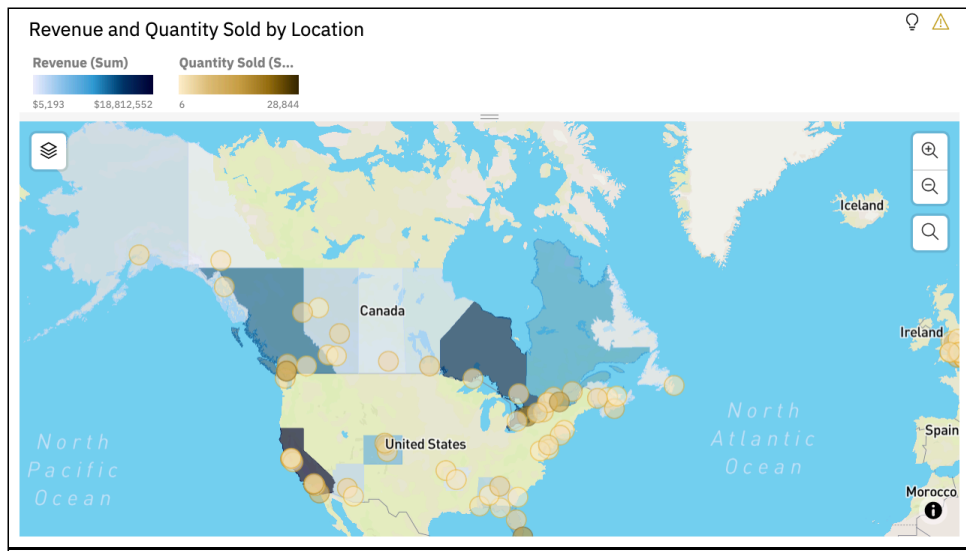
⋮

Click or drag data here

Local filters

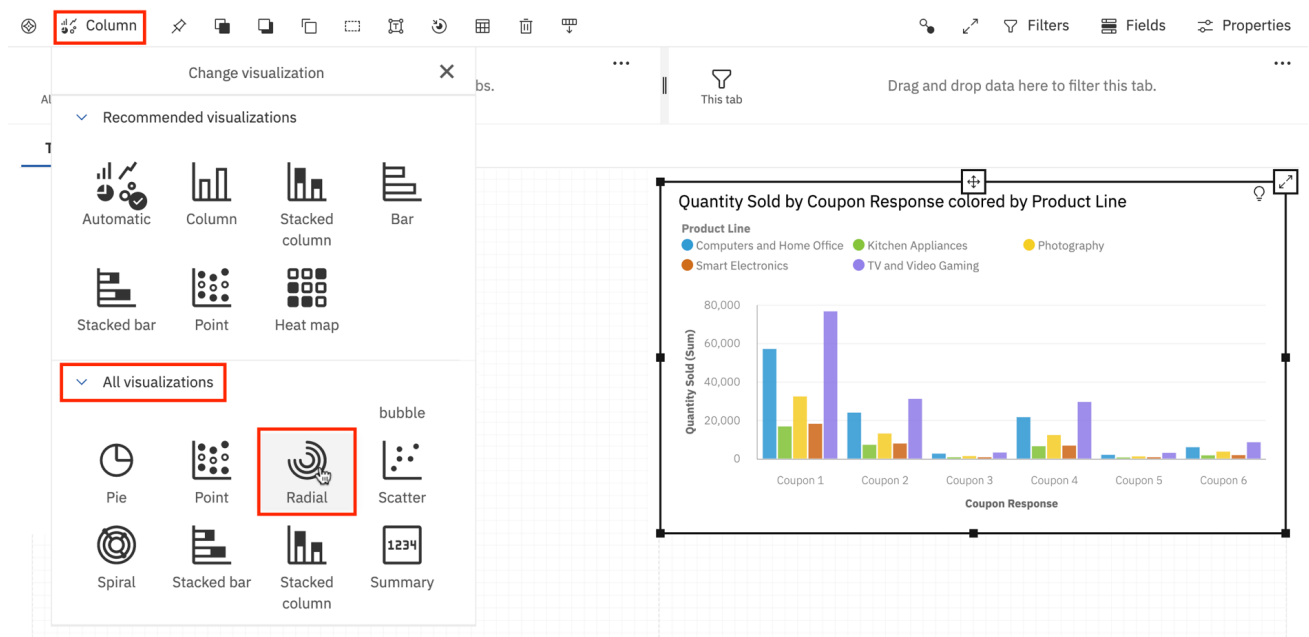
Click or drag data here

- Click on the **Fields** button to close the fields panel.
- Click on the **Map chart widget in Panel 1** to bring it into focus if needed. From the on-demand toolbar, click **Edit the title**. Enter the title "Revenue and Quantity Sold by Location" to the visualization.
- Click the **Properties** button in the top-right corner to open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a "Black" border.
- To save the current work of the dashboard, press **CTRL+S**.
- Your **Panel 1 widget** should look like the one below:



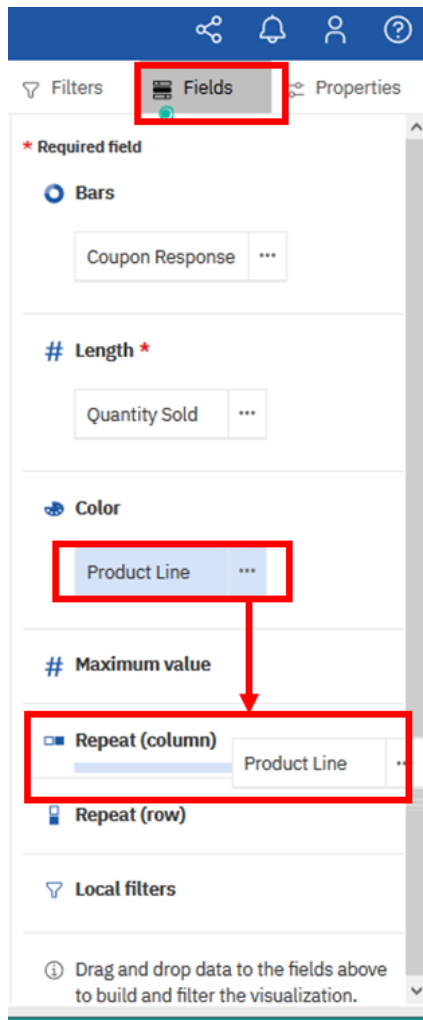
## Task B : Using an Automatic Method to Create a Visualization for Panel 2

1. From the **Data Source** panel, press **CTRL** and select **Product Line**, **Coupon Response**, **Quantity sold** and drag them to the center of **Panel 2**, releasing them once you see the **drop zone** turn blue.
2. Click on the **Line chart** in **panel 2** to bring it into focus and render the **on-demand toolbar**.
3. Click the **Change Visualization** button in the on-demand toolbar. Use the **arrow ">"** to expand **All Visualizations**. Scroll down and select **Radial**.

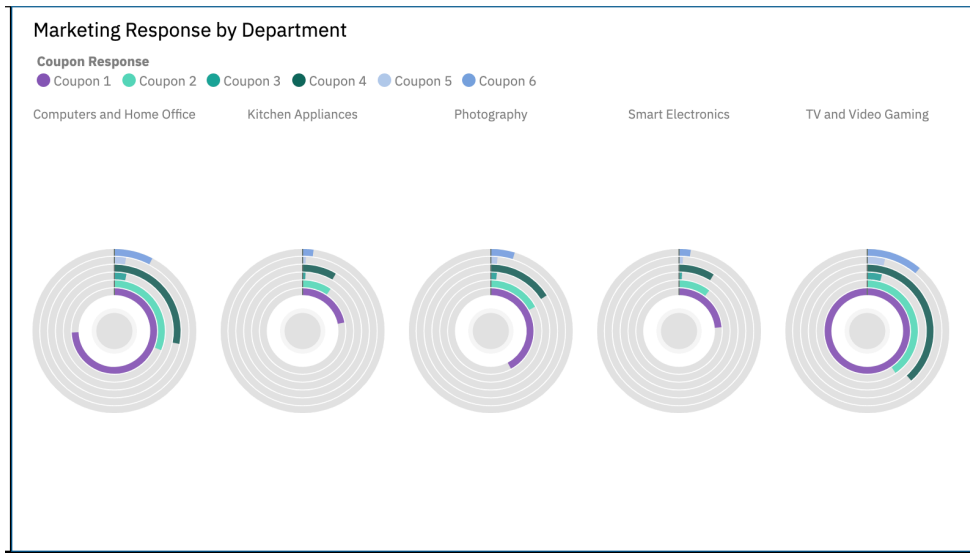


4. Click on the **Radial chart** in **Panel 2** to bring it into focus. Click on the **Fields** button on the **Dashboard toolbar** to open the Fields Panel.
5. Drag and drop **Product Line** to the **Repeat (column)** area.





6. Next, move the **Coupon Response** to the **Color** field.
7. Click on the **Fields** button to close the fields panel.
8. Click on the **Radial chart widget in Panel 2** to bring it into focus. From the on-demand toolbar, click **Edit the title**. Enter the title "Marketing Response by Department" to the visualization.
9. Click on the **Radial chart in Panel 2** if needed to bring it into focus.
10. Open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a "Black" border.
11. To save the current work of the dashboard, press **CTRL+S**.
12. Your **Panel 2 widget** should look like the one below:



## Task C : Using Cognos Assistant to Create a Visualization for Panel 3

1. From the **Navigation** panel, select **Assistant** to open the **Cognos Assistant** panel.
2. In the **Ask a question** input text box, at the bottom of the left hand pane, type "**show Quantity Sold and City**" and press **Enter**.
3. Click on **show related visualizations**.

**CustomerLoyaltyProgram.csv**

9/21/2020

CustomerLoyaltyProgram.csv

How can I help you?

show Quantity Sold and City

Here is the chart from source **CustomerLoyaltyProgram.csv**:

Quantity Sold for City regions ⓘ

Quantity Sold (Su...  
6 29,848

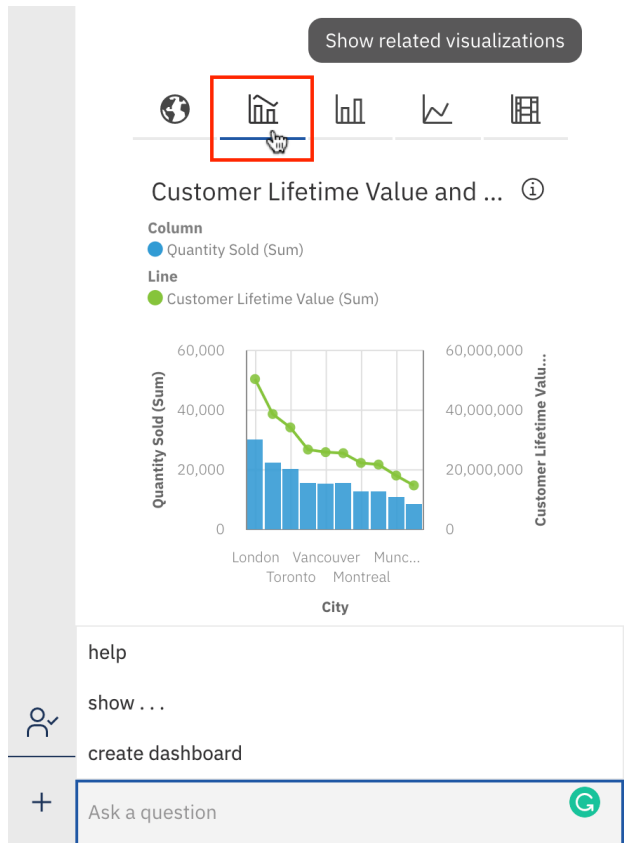
Show related visualizations

Create dashboard from the chart

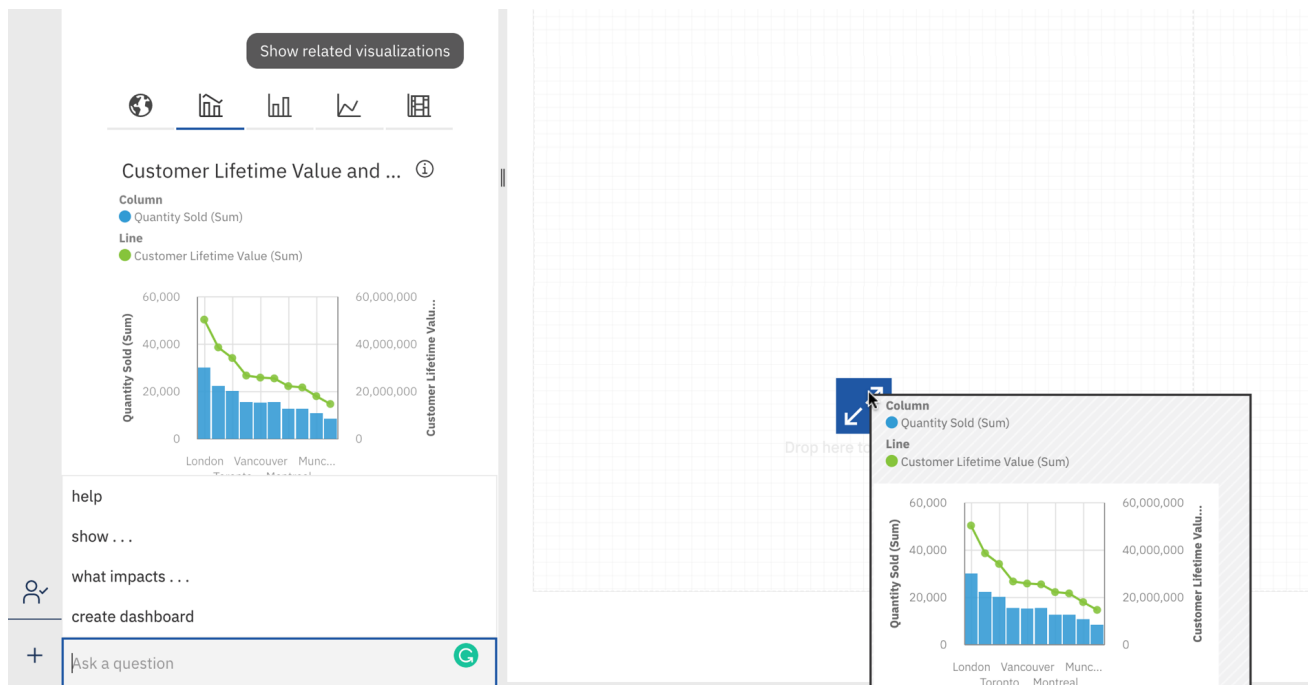
help  
show ...  
create dashboard

Ask a question

4. Select the second chart visualization.



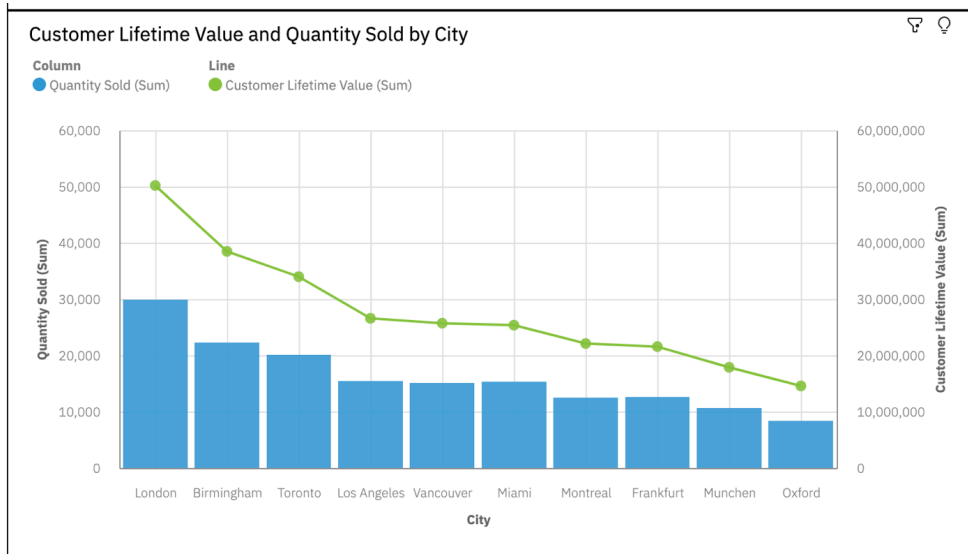
5. From the **Cognos Assistant** panel, select the second chart visualization and drag it to the center of **Panel 3**, releasing it once you see the **drop zone turn blue**.



6. Click on the **Line and column chart** in **Panel 3** if needed to bring it into focus.
7. Open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a "Black" border.

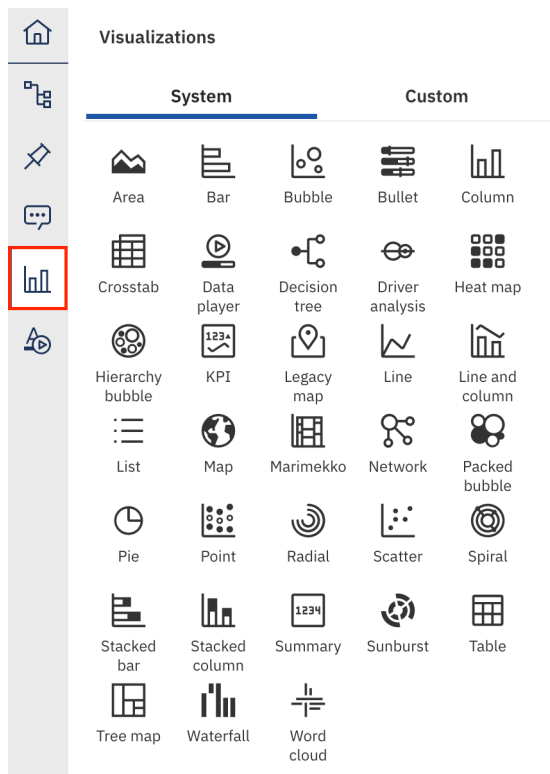
8. To save the current work of the dashboard, press **CTRL+S**.

9. Your **Panel 3 widget** should look like the one below:



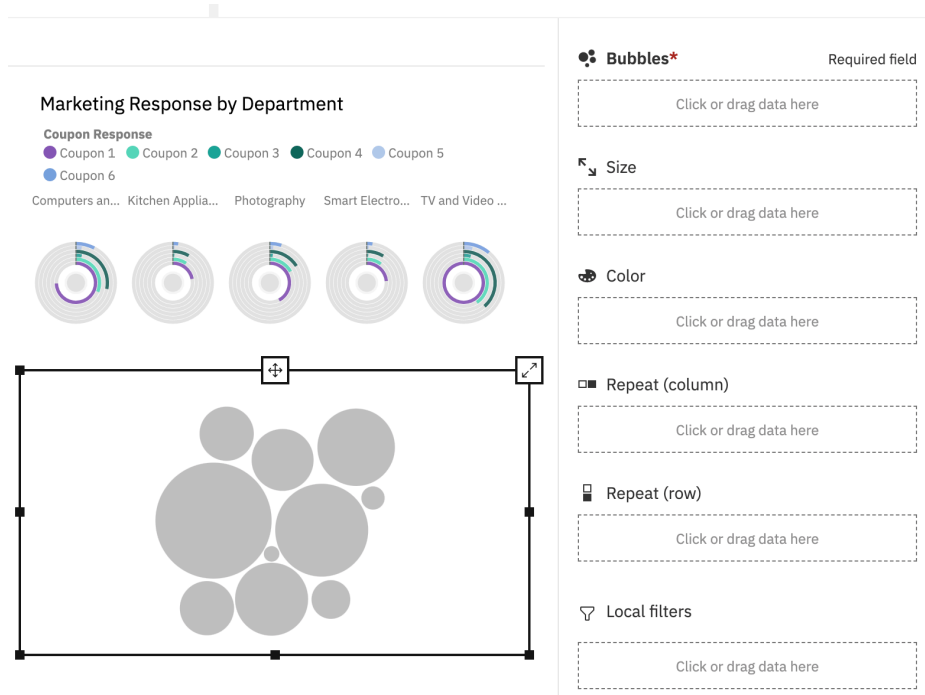
## Task D : Using a Manual Method to Create a Visualization for Panel 4

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

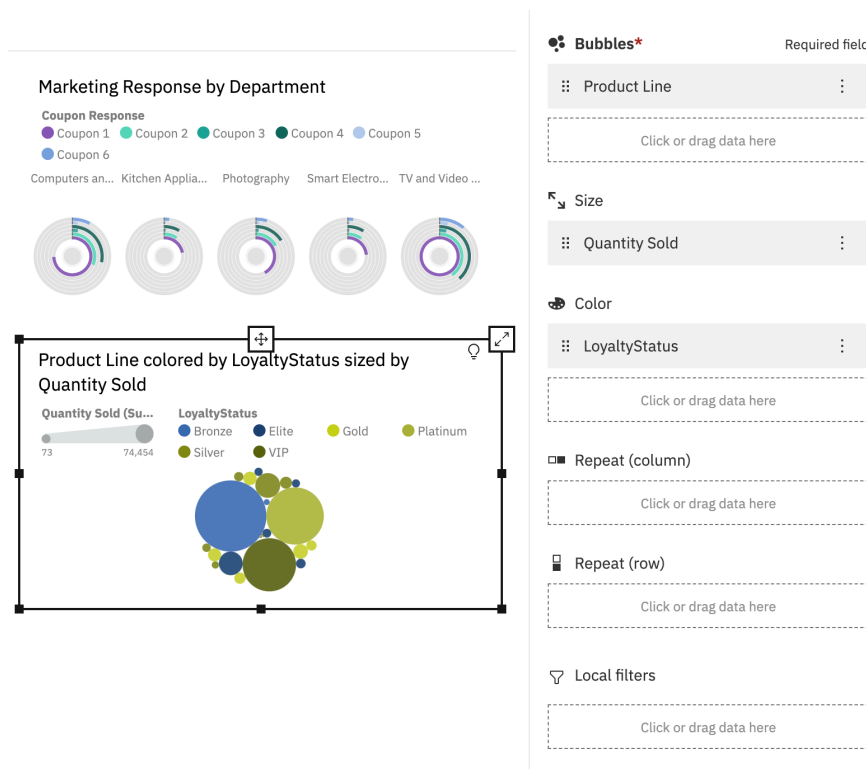


2. Select the **Packed Bubble** chart, and drag it to the center of **panel 4** of the dashboard template, releasing it once you see the **drop zone turn blue**.

3. The Packed Bubble chart visualization will open along with the **Fields** panel for you to set up the data definitions for your visualization.



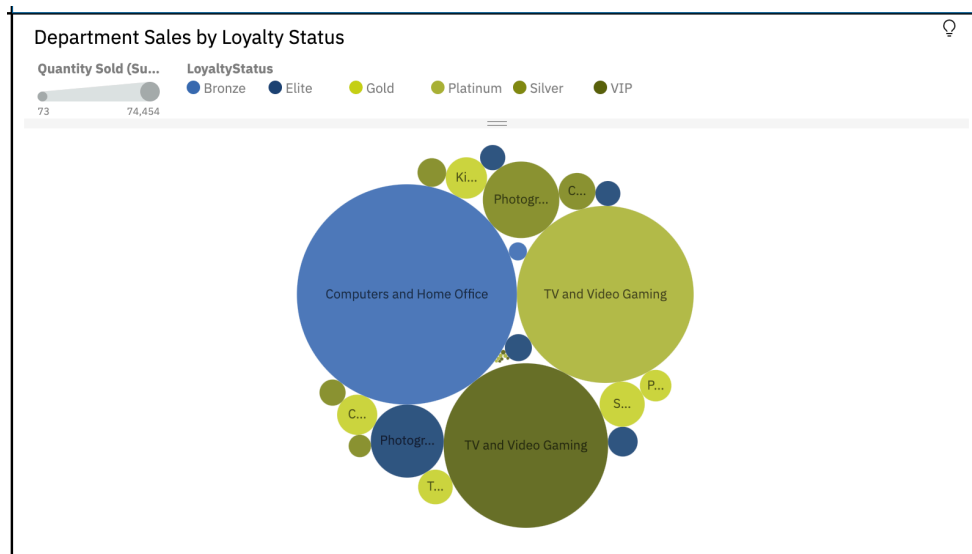
- From the **Sources** panel on the left of the screen, drag and drop the **Product Line**, **Quantity Sold**, **Loyalty Status** sources into the **Bubbles**, **Size**, **Color** data slots of the Fields panel respectively.



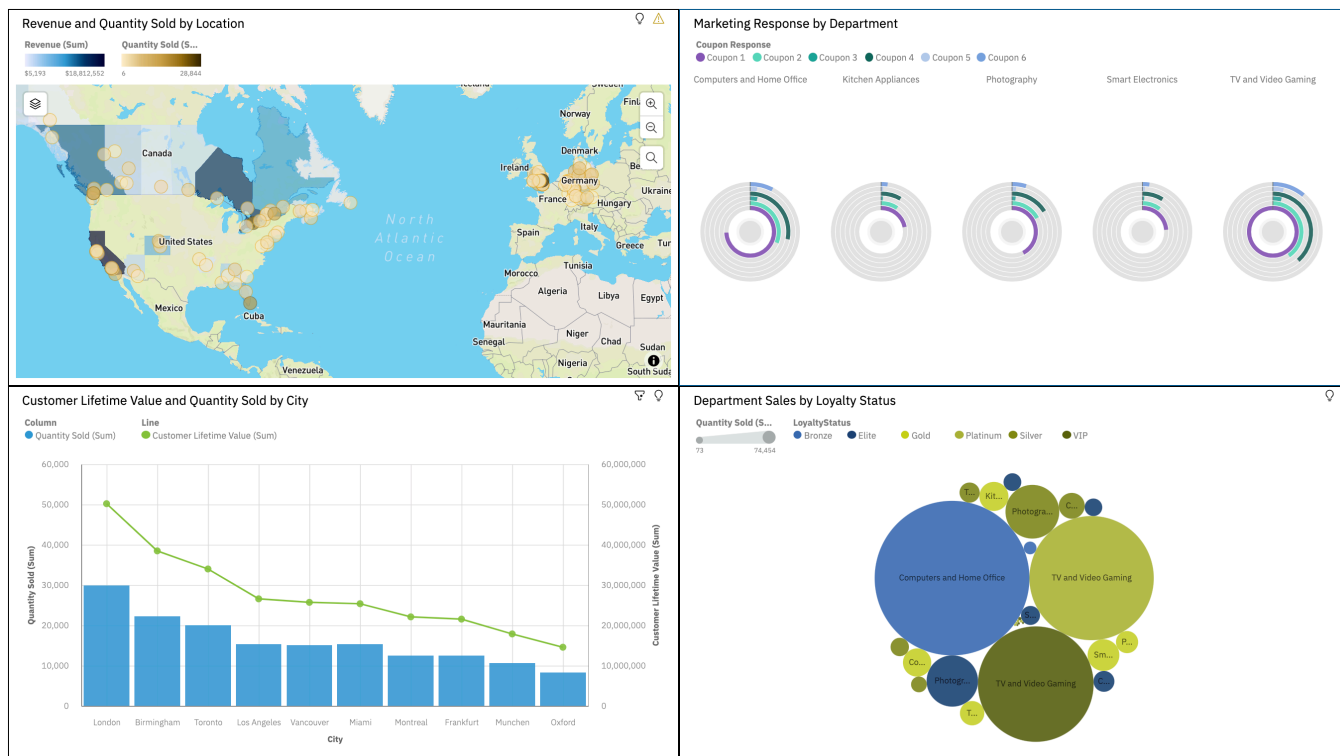
- Click on the **Fields** button to close the panel.
- Click on the **Packed bubble chart widget in Panel 4** to bring it into focus. From the on-demand toolbar, click **Edit the title**. Enter the title "Department Sales by Loyalty Status" to the visualization.
- Click on the **Packed bubble chart in Panel 4** if needed to bring it into focus.
- Open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a "Black" border.

9. To save the current work of the dashboard, press **CTRL+S**.

10. Your **Panel 4 widget** should look like the one below:



Finally, your dashboard "B - Customer" should look like below:



Congratulations! You have completed Lab 5B, and you are ready for the next topic.

Author(s)

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## Other Contributor(s)

- [Steve Ryan](#)

## Changelog

Date	Version	Changed by	Change Description
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

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