



Hands-on Lab: Advanced Dashboard Capabilities in Cognos Analytics

Estimated time needed: 45 minutes

In this lab, you will learn and leverage some advanced Cognos Analytics dashboard capabilities. You will learn how to create calculations, how to keep/exclude data points from a visualization, how to set top/bottom on a visualization, how to create and leverage navigation paths, and lastly, how to filter data in a dashboard.

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. This dataset is published by IBM. You can download the dataset file directly from here: [CustomerLoyaltyProgram.csv](#)

Objectives

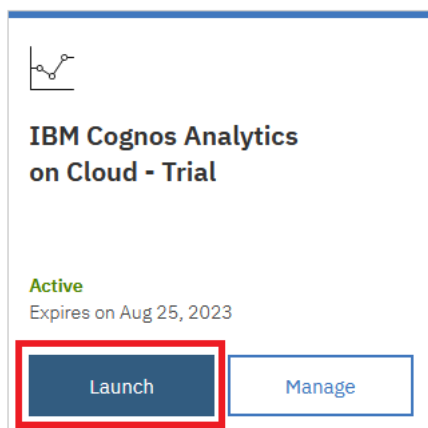
After completing this lab, you will be able to:

- Start a new dashboard
- Create calculations
- Keep/exclude data points from a visualization
- Set top/bottom on a visualization
- Create and leverage navigation paths
- Filter data in a dashboard

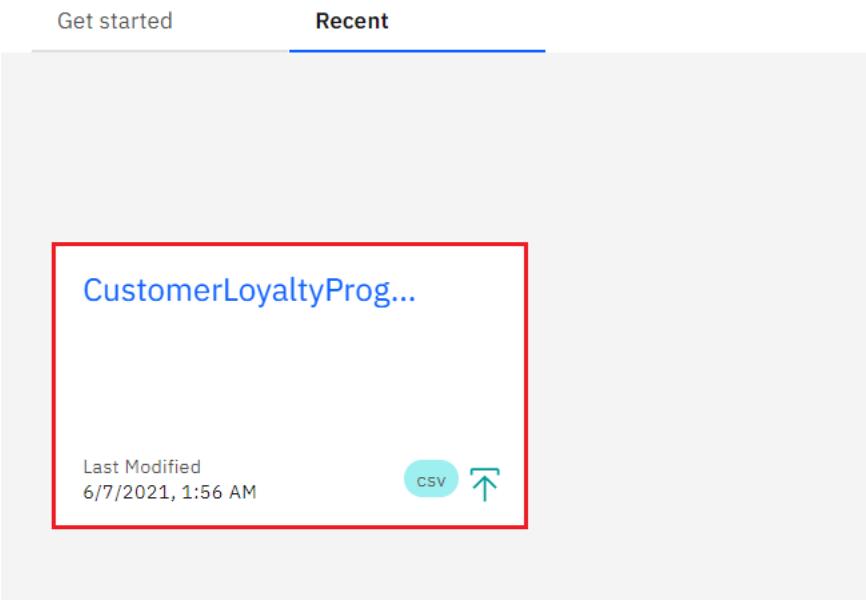
Exercise 1: Start a New Dashboard

In this exercise, you will start a new dashboard for working with advanced Cognos Analytics dashboard capabilities.

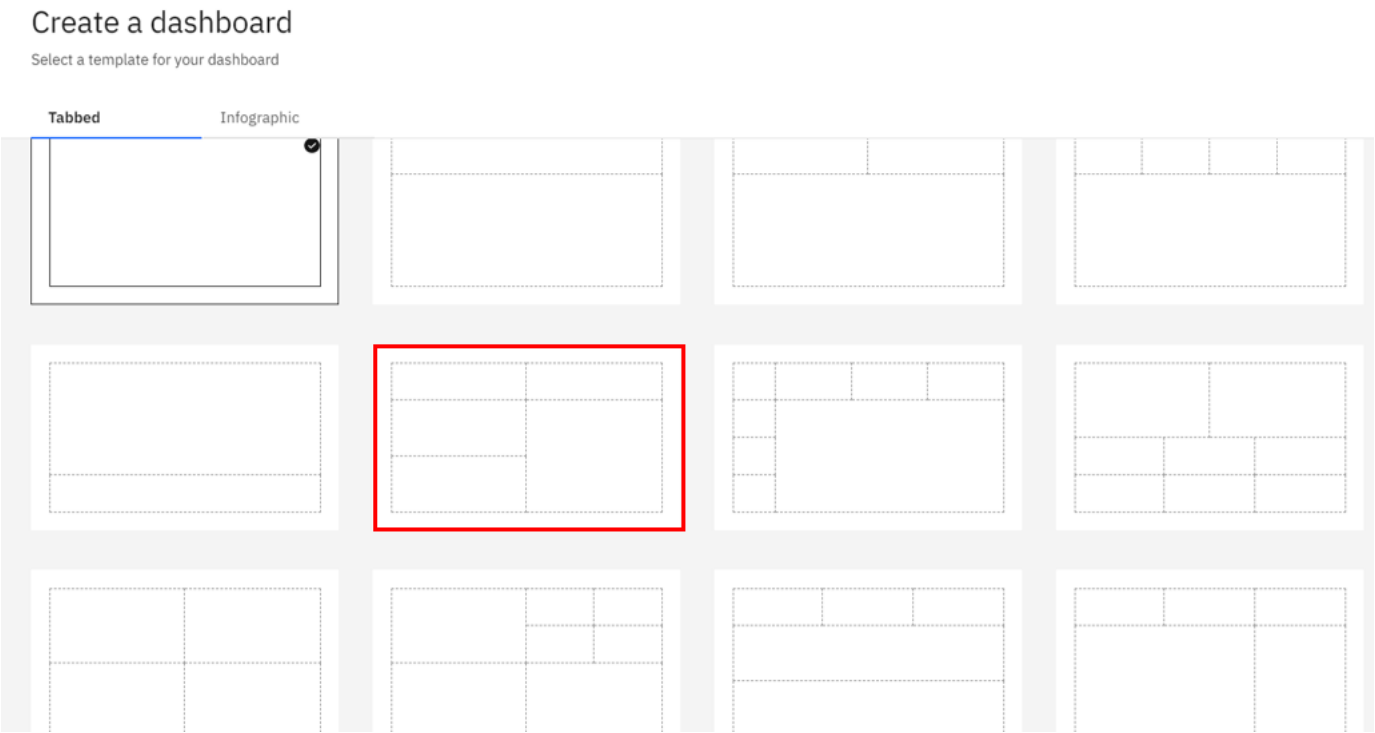
1. To sign in to the Cognos Analytics platform with your IBMid, go to myibm.ibm.com/dashboard/.
2. Enter your IBMid and password.
3. Scroll down and click **Launch**.



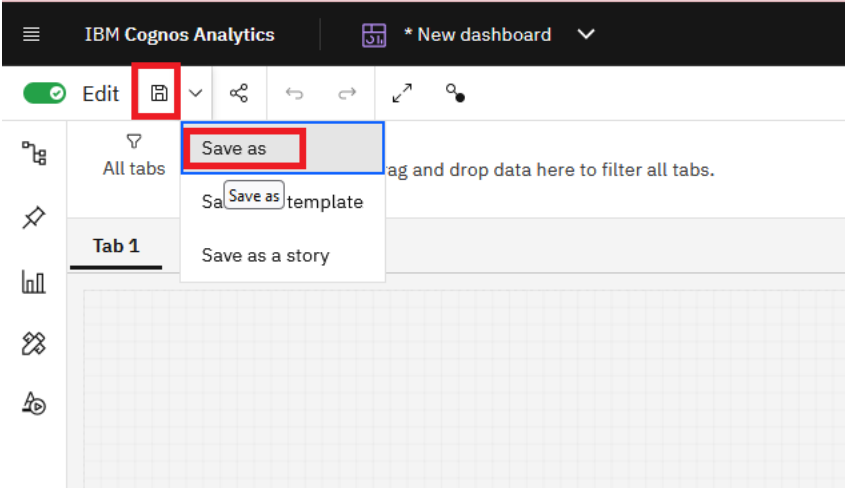
4. From the **Recent** section, click the uploaded data file **CustomerLoyaltyProgram.csv**.



5. The template window will be displayed, allowing you to select the type of dashboard and the template style. Select the **Tabbed** dashboard style. This will allow you to have multiple pages for your dashboards. Select the *five-panel template*, then click **Create**.



6. To save the newly created dashboard, press **CTRL+S** or click the **Save** icon and then click **Save as**.



7. A new **Save as** window will pop up. Follow the steps as displayed below to save your dashboard as **Advanced Dashboard** in the **My content** section.

* New dashboard

29

Save as

Name

Advanced Dashboard



Step 1 - Enter the name for the dashboard

Selected destination: My content

My content

Team content

Step 2 - Select My content

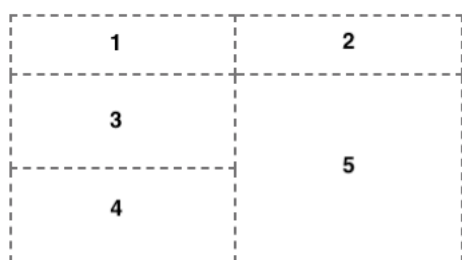
Name	Type	Last Accessed
 CLP_Dashboard	Dashboard	7/27/2023, 3:35 AM
 CustomerLoyaltyProgram.csv	Uploaded file	7/26/2023, 5:22 AM

Cancel

Save

Step 3 - Click on Save

8. As you build the dashboard, the location placement for visualization widgets in the dashboard template will be referenced using the following Panel numbers.

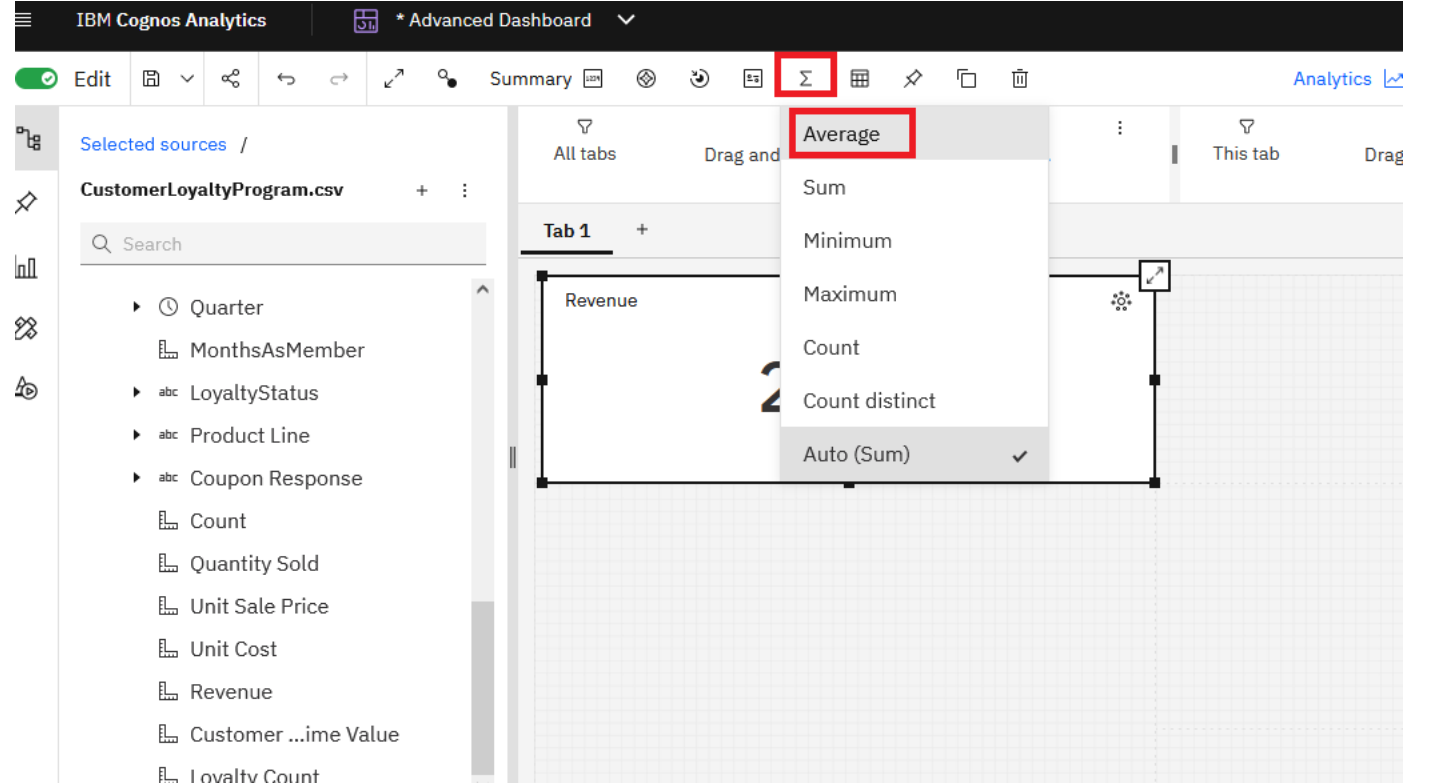


9. From the **Navigation** panel, select **Sources** to ensure the data source panel is open in the left pane.

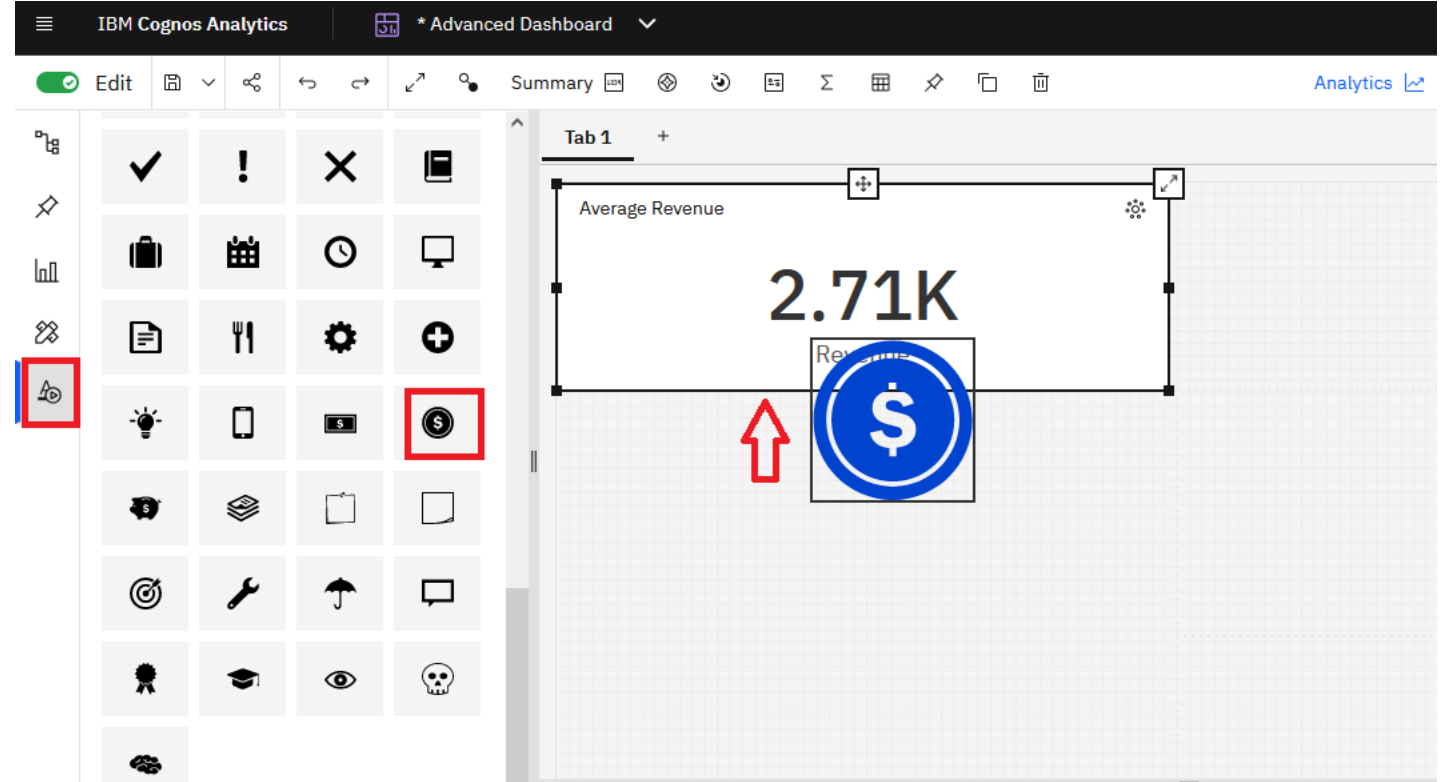
10. From the data source panel, select **Revenue** and drag it to the center of **Panel 1**, releasing it once you see the drop zone turn blue.

The screenshot displays the IBM Cognos Analytics Advanced Dashboard. On the left, the 'Selected sources' panel lists various data fields from the 'CustomerLoyaltyProgram.csv' source. The 'Revenue' field is highlighted. The main workspace shows a grid with a 'Revenue' data source being added to a visualization area. The interface includes a top navigation bar with 'IBM Cognos Analytics' and 'Advanced Dashboard' tabs, and a bottom toolbar with icons for editing and navigation.

11. Click the summary chart in Panel 1 to bring it into focus. From the on-demand toolbar that appears in the main toolbar, click **Summarize**, and then select **Average**.



12. In the summary chart in Panel 1, select the title of the visualization and change it to *Average Revenue*.
13. From the **Navigation** panel, select **Widgets** to open the widgets panel. Drag and drop **Money coin** from **Shapes** to the center of Panel 1.



14. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the toolbar.
15. Your Panel 1 visualization should look similar to the one below:

Average Revenue



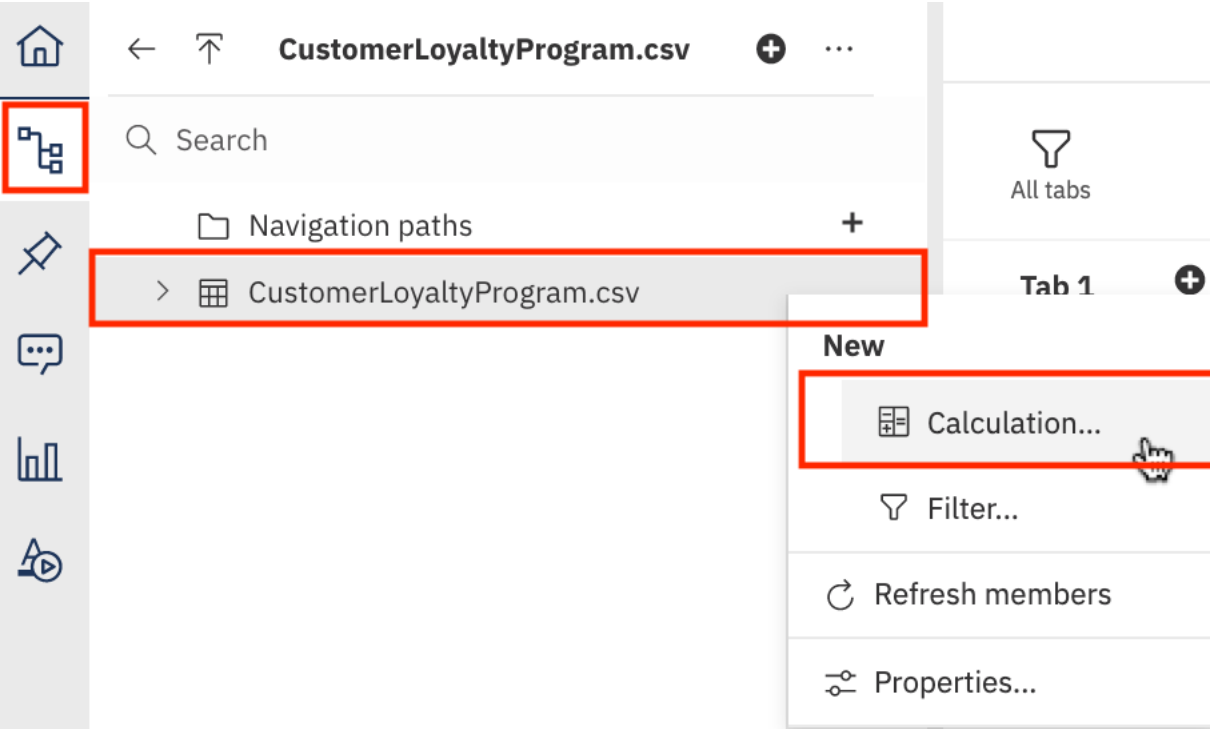
Exercise 2: Working with Advanced Cognos Analytics dashboard capabilities

In this exercise, you will practice some advanced Cognos Analytics dashboard capabilities.

- Task A: Create calculations
- Task B: Keep/Exclude Data Points from a visualization
- Task C: Set Top/Bottom on a visualization
- Task D: Create and Leverage navigation paths
- Task E: Filter Data in the current tab

Task A: Create Calculations

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. Right-click the **CustomerLoyaltyProgram.csv** data source and select **Calculation**.



3. Change the calculation name to **Margin**. From the **Components** panel, drag **Unit Sale Price** to the **Expression** field, type a space, then the minus sign, -, to the right of it, and then drag **Unit Cost** to the right of that. Click **OK**.

IBM Cognos Analytics

Advanced Dashboard

Create calculation

Name

Margin

Components

Expression

Search

MonthsAsMember

abc LoyaltyStatus

abc Product Line

abc Coupo...ponse

Count

Quantity Sold

Unit Sale Price

Unit Cost

Revenue

Custome...e Value

Loyalty Count

1

Unit Sale Price

Information

Expression

1 Unit_Sale_Price - Unit_Cost

4. In the data source panel, expand CustomerLoyaltyProgram.csv if needed, and drag **Margin** to the center of **Panel 2**, releasing it once you see the drop zone turn blue.
5. Right-click the margin chart in Panel 2, point to **Summarize**, and then select **Average**.
6. From the data source panel, right-click on **Margin** and click **Format data**.

IBM Cognos Analytics

* Advanced Dashboard

Edit

Summary

Analytics

Selected sources /

CustomerLoyaltyProgram.csv

Navigation paths

CustomerLo...rogram.csv

Margin

Loyalty#

abc First Name

abc Last Name

abc Customer Name

Country

Province or State

City

Latitude

Tab 1

Average Revenue

Margin

8

\$ = 100 Revenue

Filter...

Create calculation...

Create data group...

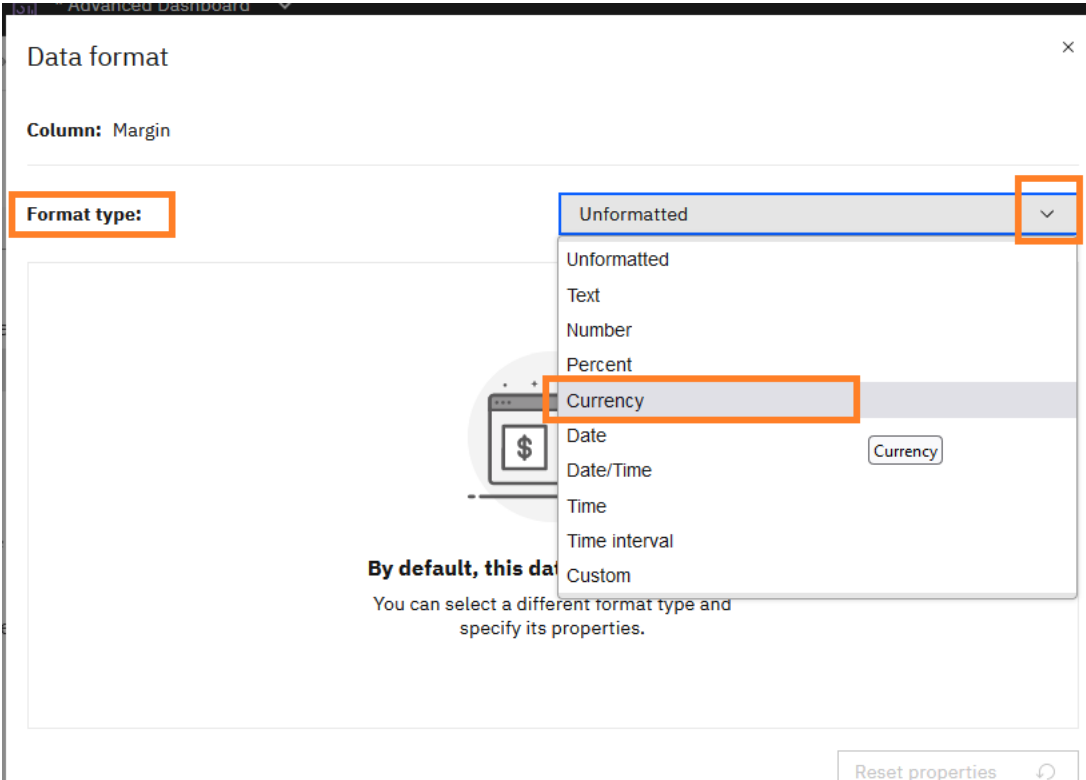
Edit calculation...

Remove

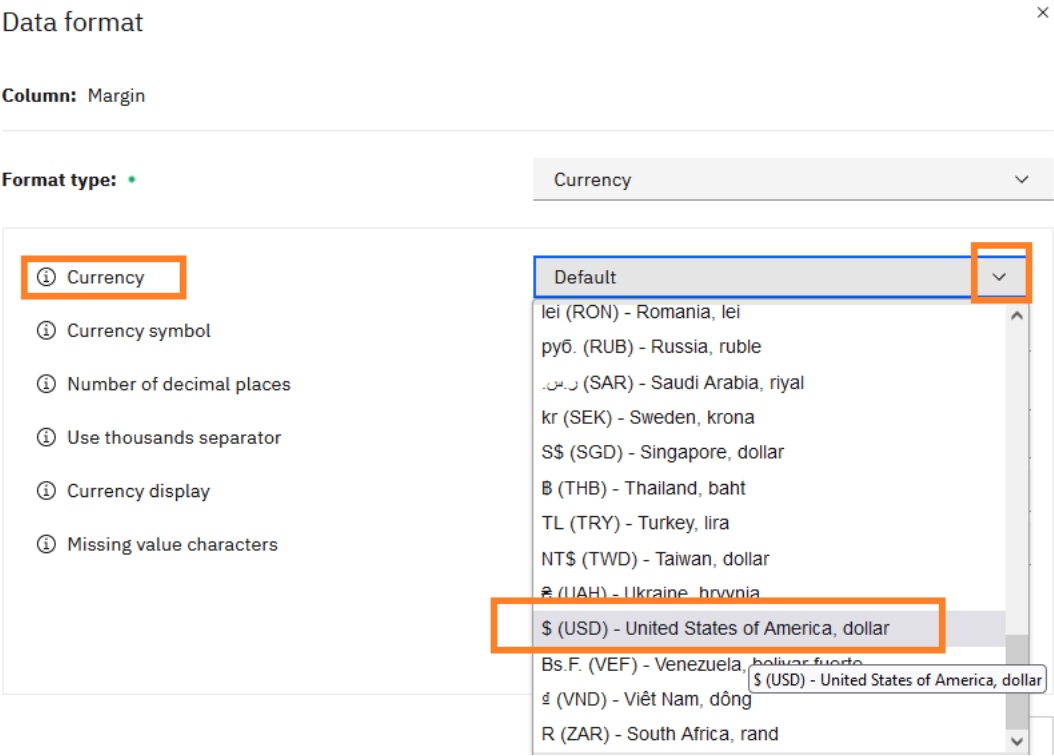
Format data...

Properties...

7. In the **Format type** list, select **Currency**.



8. Select **\$ (USD) - United States of America, dollar** as the currency and click **OK** at the bottom.



9. In the margin chart in Panel 2, select the title of the visualization and change it to *Average Margin*.

10. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the main toolbar.

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

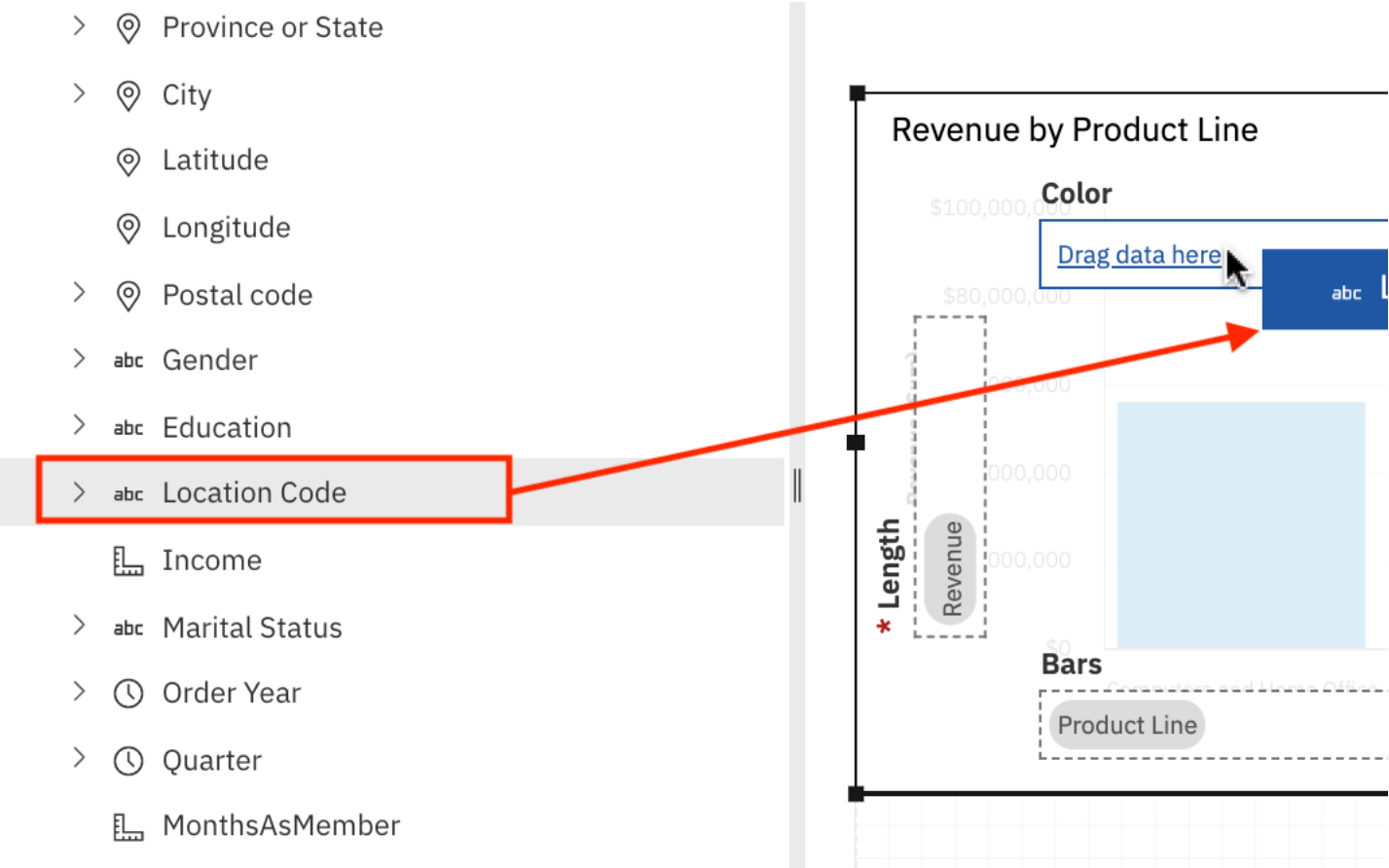
Average Margin

\$84.36

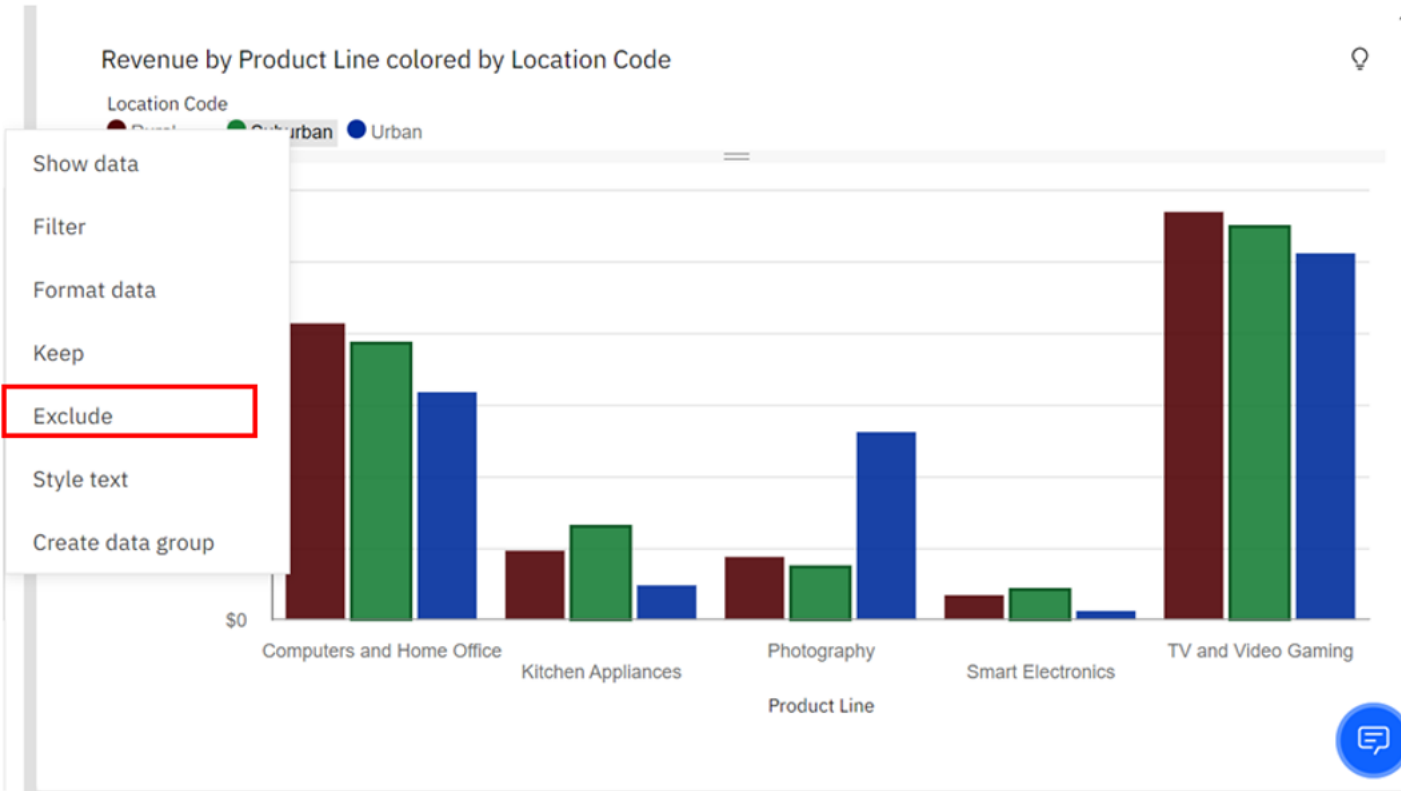
Margin

Task B: Keep/Exclude Data Points from a Visualization

- 1. In the data source panel, expand CustomerLoyaltyProgram.csv if needed. Press the CTRL key and select **Revenue** and **Product Line** and drag them both to the center of **Panel 3**, releasing them once you see the drop zone turn blue.
- 2. From the data source panel, drag **Location Code** to the **Color** drop zone of **Panel 3**.

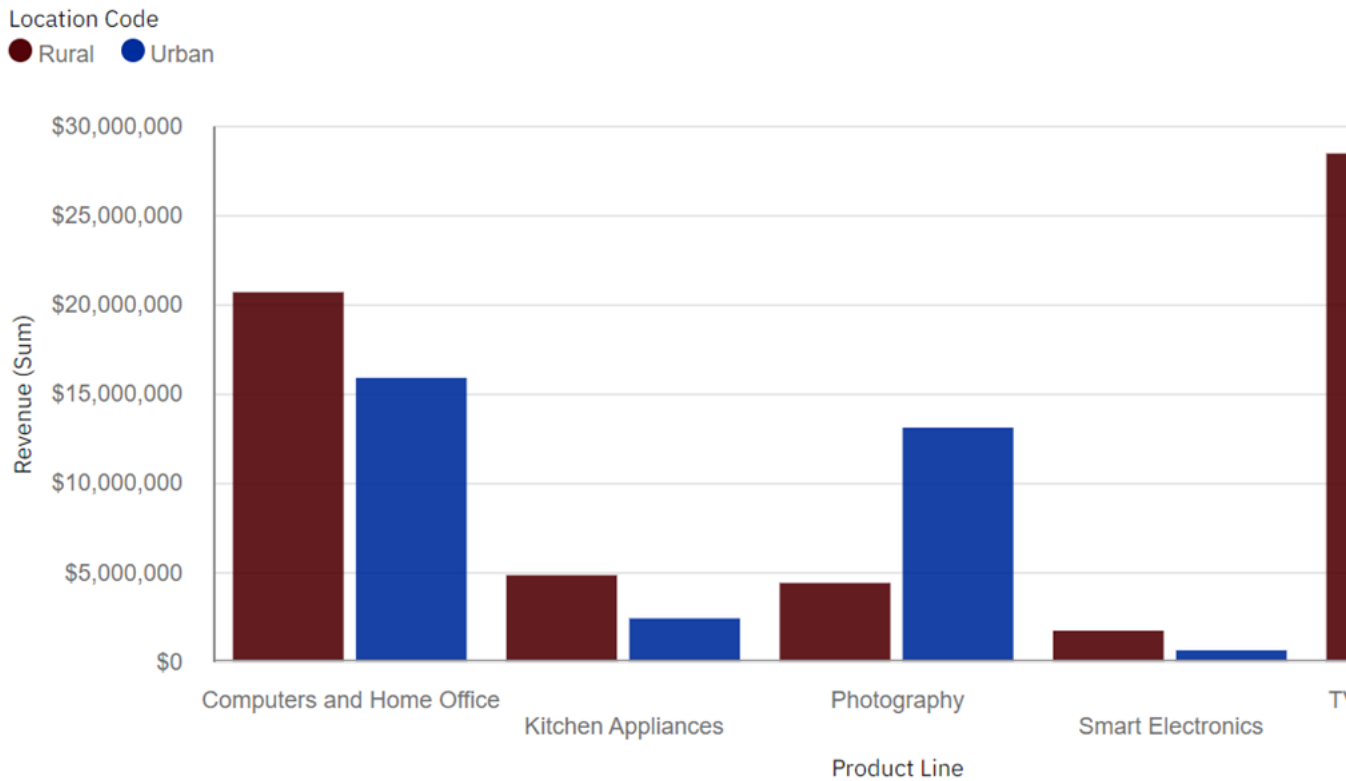


- 3. Right-click the **Suburban** data point in the Panel 3 visualization, and select **Exclude**.



- 4. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the main toolbar.
- 5. Your Panel 3 visualization should look similar to the one below:

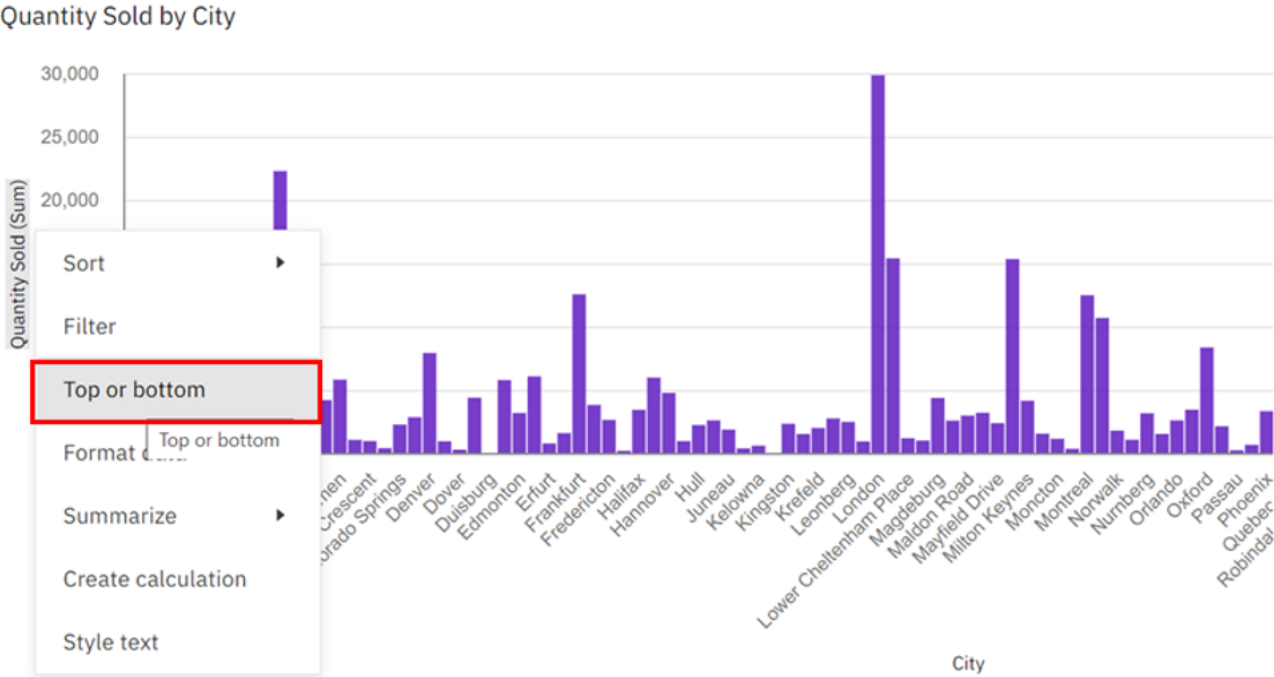
Revenue by Product Line colored by Location Code



Task C: Set Top/Bottom on a Visualization

- 1. From the data source panel, press the **CTRL** key and select **Quantity Sold** and **City**, and drag them both to the center of **Panel 4**, releasing them once you see the drop zone turn blue.
- 2. Click the chart in Panel 4 to bring it into focus and render the on-demand toolbar.

- 3. Click the **Change visualization** button in the on-demand toolbar (which will currently say **Map**), then expand **All visualizations**, if needed, and select **Column**.
- 4. In Panel 4, right-click the axis label **Quantity Sold (Sum)** down the left side of the chart and select **Top or bottom**.



- 5. Ensure the value of **Number of results** is set to **10**, then select **Top count**.

<

Top or bottom

Number of results

The value can be 1 - 100

10

Show

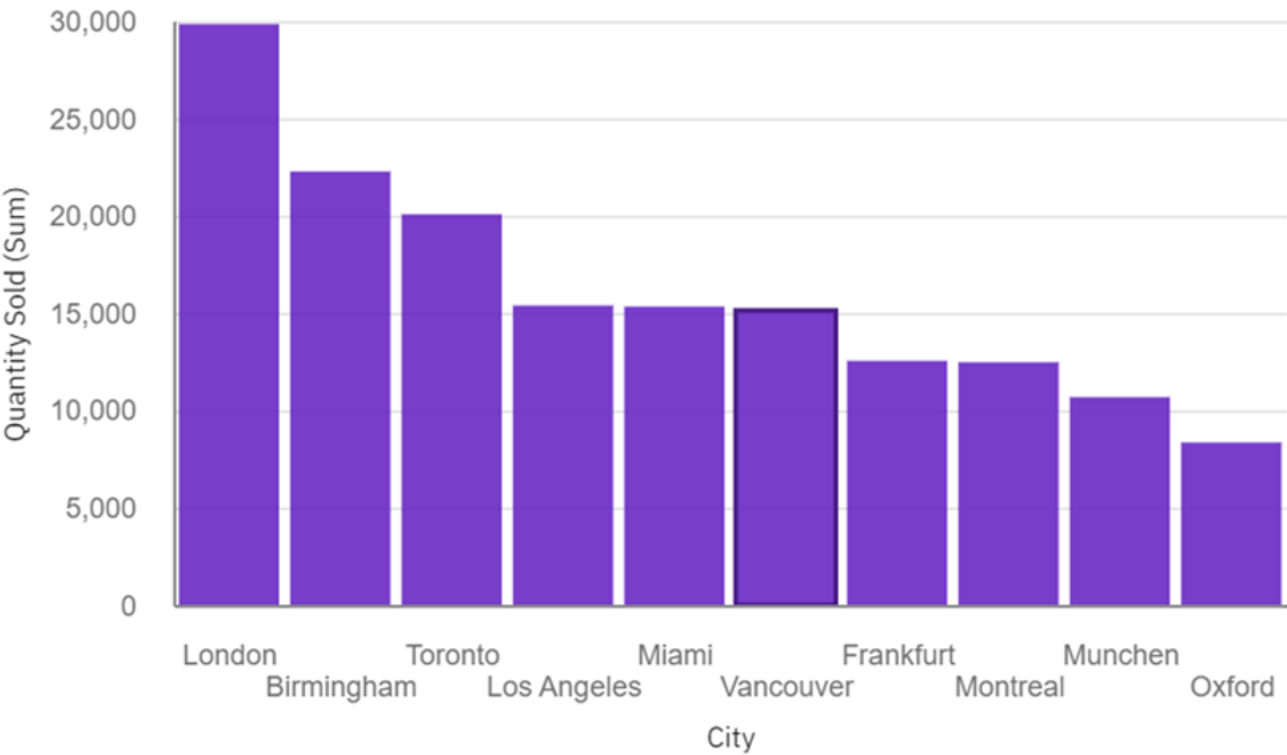
☒ Top count

☐ Bottom count

Clear

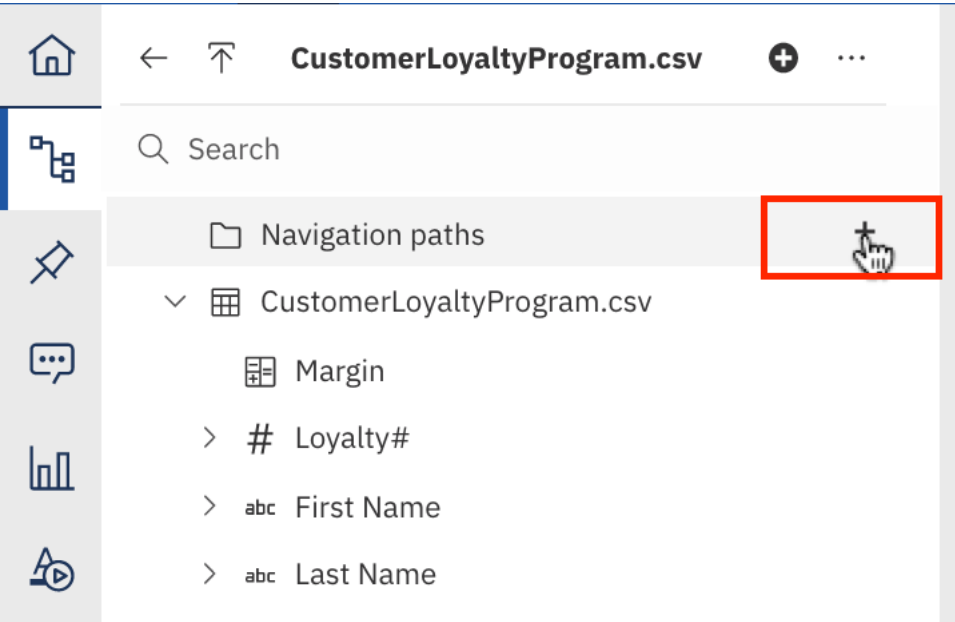
- 6. In the column chart in Panel 4, select the title of the visualization and change it to *Top 10 Quantity Sold by City*.
- 7. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the main toolbar.
- 8. Your Panel 4 visualization should look similar to the one below:

Quantity Sold by City



Task D: Create and leverage navigation paths

1. In the data source panel on the left, scroll to the top of the list and click the **plus sign** labeled **Create navigation path** to the right of **Navigation paths**.



2. In the **Create navigation path** dialog box, expand **CustomerLoyaltyProgram.csv**, if needed. Drag **Order Year**, **Quarter**, **Country**, and **City** sequentially to the right hand panel of the dialog box, maintaining the order (shown in the image below). Once done, click **OK**.

Create navigation path

Q Search

CustomerLoyaltyProgram.csv

Loyalty#

abc First Name

abc Last Name

abc Customer Name

Country

Province or State

City

Latitude

Longitude

Postal code

abc Gender

abc Education

abc Location Code

Name

Order Year - City

Select and order the columns to use in the navigation

Order Year

CustomerLoyaltyProgram.csv

Quarter

CustomerLoyaltyProgram.csv

Country

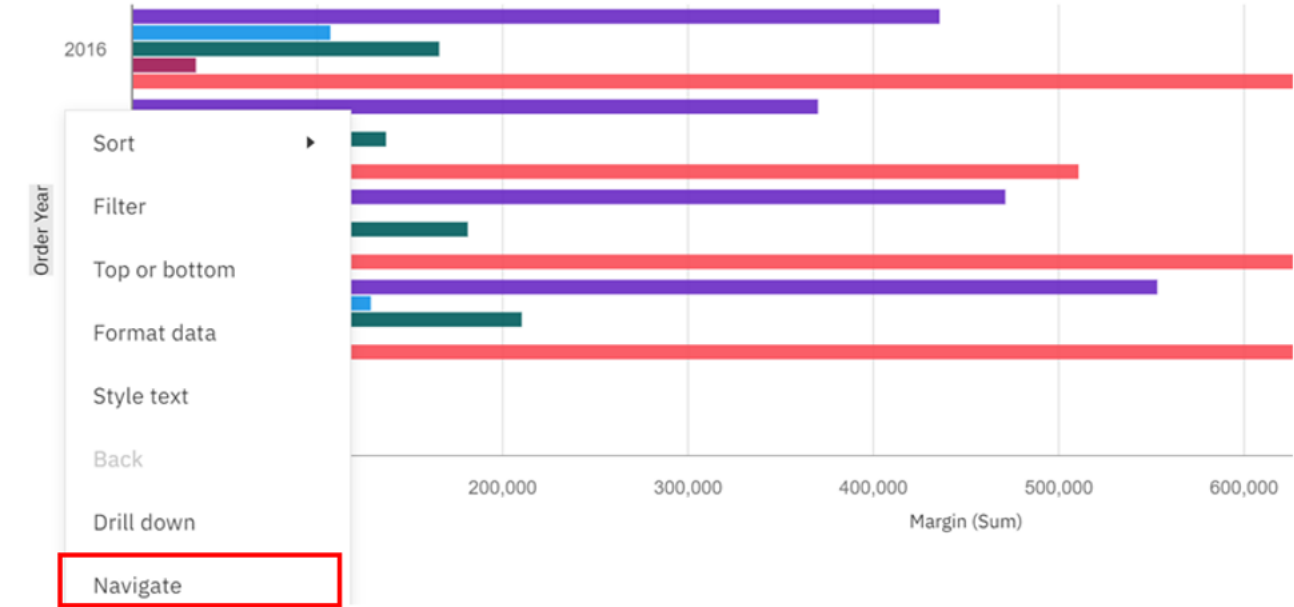
CustomerLoyaltyProgram.csv

City

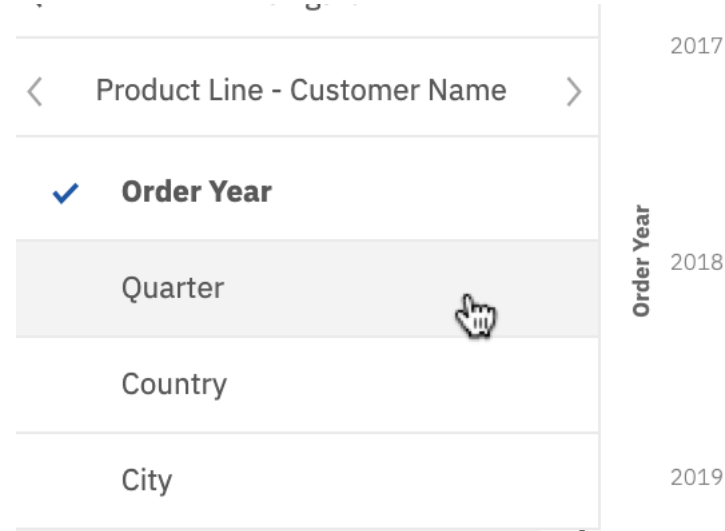
CustomerLoyaltyProgram.csv



- 3. From the data source panel, press the **CTRL** key and select **Margin**, **Product Line**, and **Order Year** and drag them to the center of **Panel 5**, releasing them once you see the drop zone turn blue.
- 4. Click the line chart in Panel 5 to bring it into focus and render the on-demand toolbar.
- 5. Click the **Change visualization** button in the on-demand toolbar (which will currently say **Line**), then expand **All visualizations**, if needed, and select **Bar**.
- 6. In Panel 5, right-click the axis label **Order Year** down the left side of the chart, and select **Navigate**.

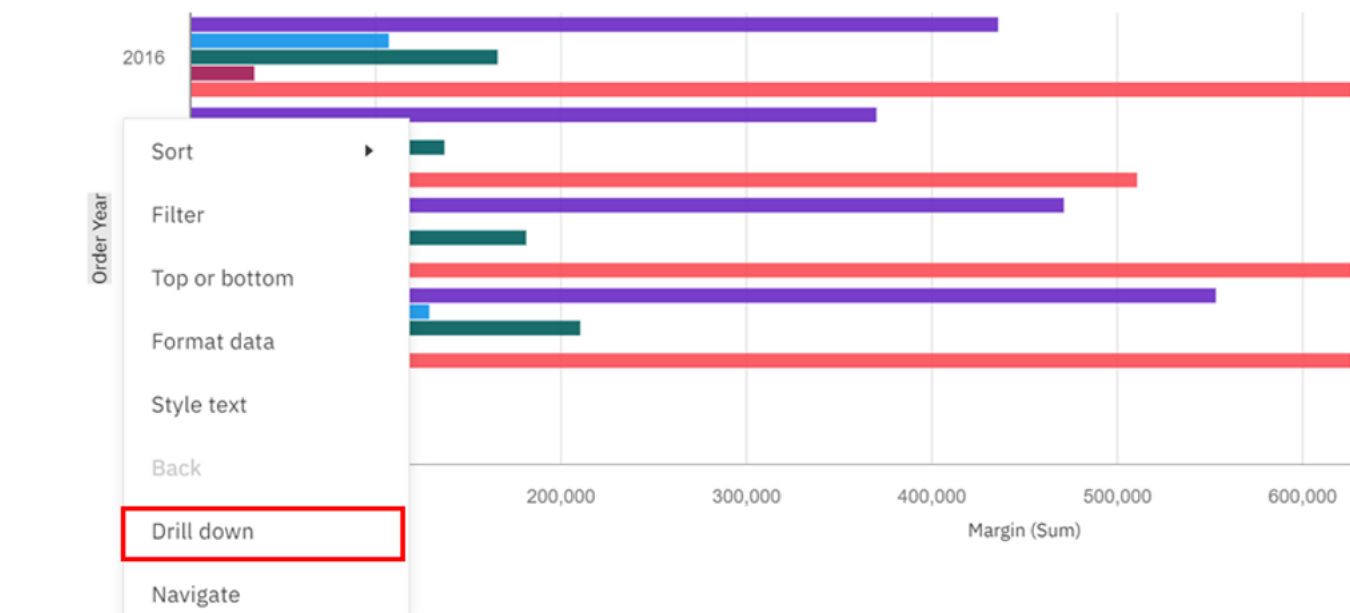


7. One by one, select the **Order Year**, **Quarter**, **Country**, and **City** options in the **Navigate** dialog box to view the different navigation paths and observe the resulting visualization in Panel 5 as you select each one. Lastly, keep the **Order Year** option selected.



8. Alternative interactive way with Drill down/back:

- In the bar chart in Panel 5, right-click the **2016 - Smart Electronics** bar of the bar chart, and select **Drill down**.



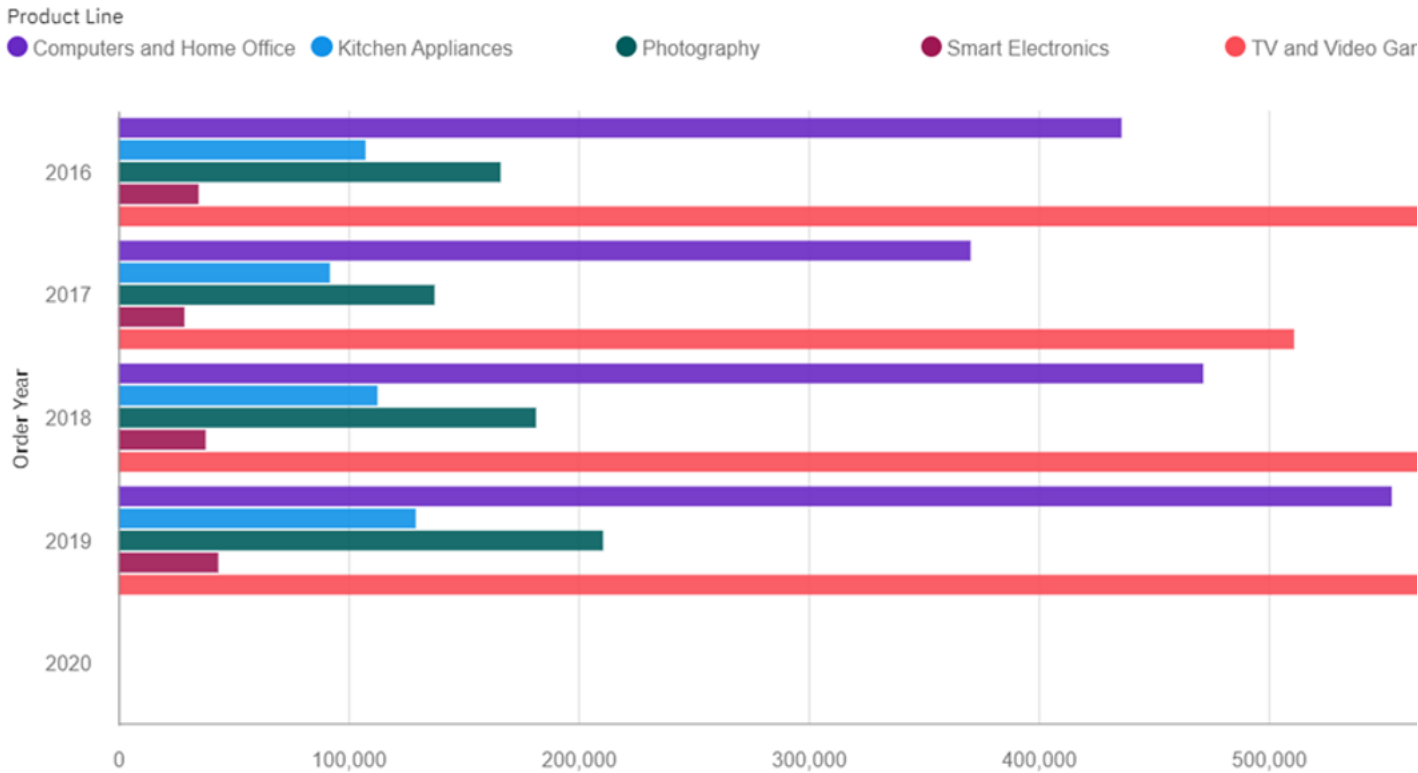
- Now right-click the **Q1 - Smart Electronics** bar of the bar chart, and select **Back**.



9. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the main toolbar.


10. Your Panel 5 visualization should look similar to the one below:

Margin by Order Year colored by Product Line



Task E: Filter Data in the Current Tab


1. If required, click **Filters** in the **Dashboard Toolbar** to display the filters pane.



All tabs

Drag and drop data here to filter all tabs.


2. From the data source panel, select **Product Line** and drag it to the **This tab** filter panel on the right hand side.


This tab

abc **Product Line**

Drag and drop data here to filter this tab.

3. Click the **Product Line** filter tab of the **This tab** filter panel. Select **Computers and Home Office**, **Photography**, and **TV and Video Gaming**, then click **Done**.

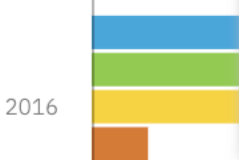

This tab

Average Margin

Margin by Order Year

Product Line

- Computers and Home Office
- TV and Video Gaming



Product Line

Find

☒ Computers and Home Office

☐ Kitchen Appliances

☒ Photography

☐ Smart Electronics

☒ TV and Video Gaming

Clear all

Invert

OK

Cancel

Your final dashboard should look similar to the one below. To save the current work in the dashboard, press **CTRL+S** or click **Save** in the main toolbar.



Feel free to change the appearance and layout of the dashboard you have just created.

Congratulations! You have completed this Lab

Author(s)

- [Sandip Saha Joy](#)

Other Contributor(s)

- [Steve Ryan](#)
- [Dr. Pooja](#)

Changelog

Date	Version	Changed by	Change Description
2023-08-21	1.6	Steve Hord	QA pass with edits
2023-08-08	1.5	Steve Ryan	ID review, updated screenshots, fixed steps/typos/markdown errors
2023-08-03	1.4	Dr. Pooja	Updated Screenshots
2022-10-28	1.4	Pratiksha Verma	Updated Screenshots
2022-02-02	1.3	Malika Singla	Updated Screenshots
2021-06-18	1.2	Malika Singla	Updated Screenshots
2020-10-02	1.1	Steve Ryan	ID review
2020-09-24	1.0	Sandip Saha Joy	Initial version created

© IBM Corporation 2020. All rights reserved.