



# 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**.


# Hello. Welcome to IBM Cognos Analytics.

## Recent

Name	Type
Simple dashboard	Dashboard

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



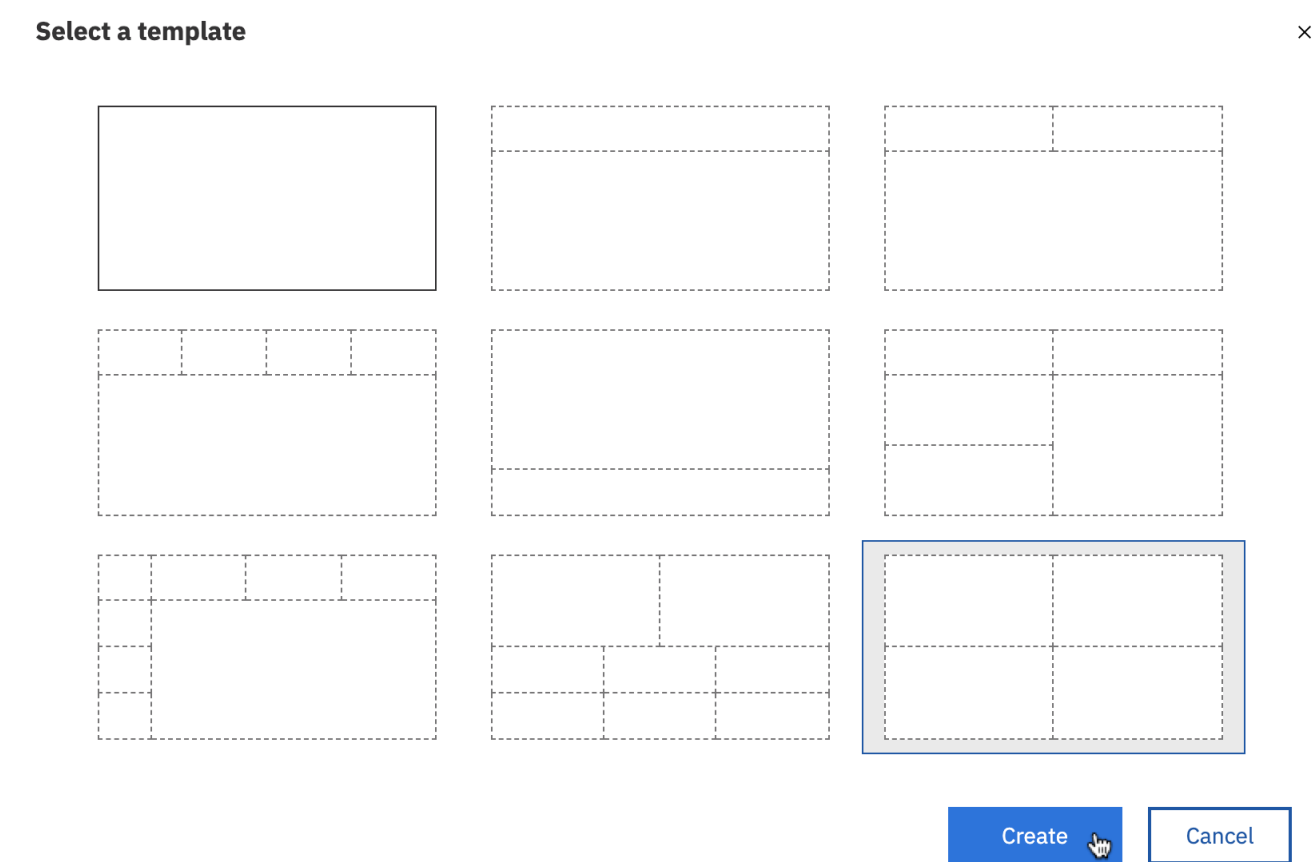
Switch to edit

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

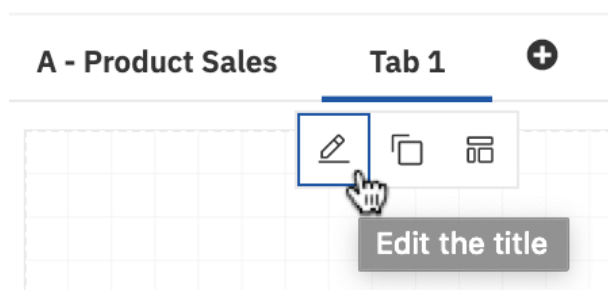
Add new tab

A - Product Sales

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**.

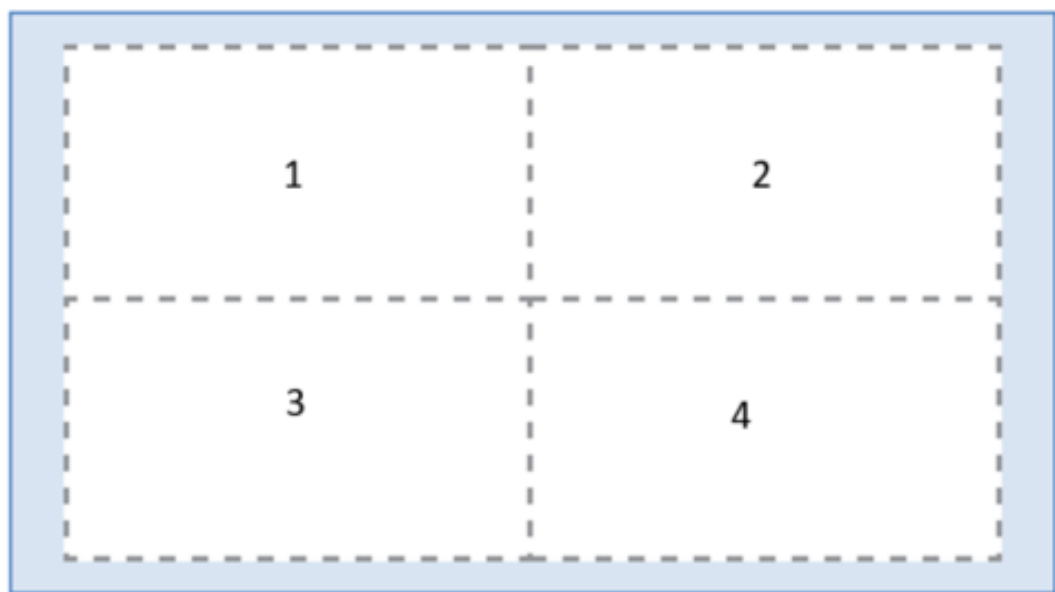


9. **Rename** the tab to "B - Customer".

# 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



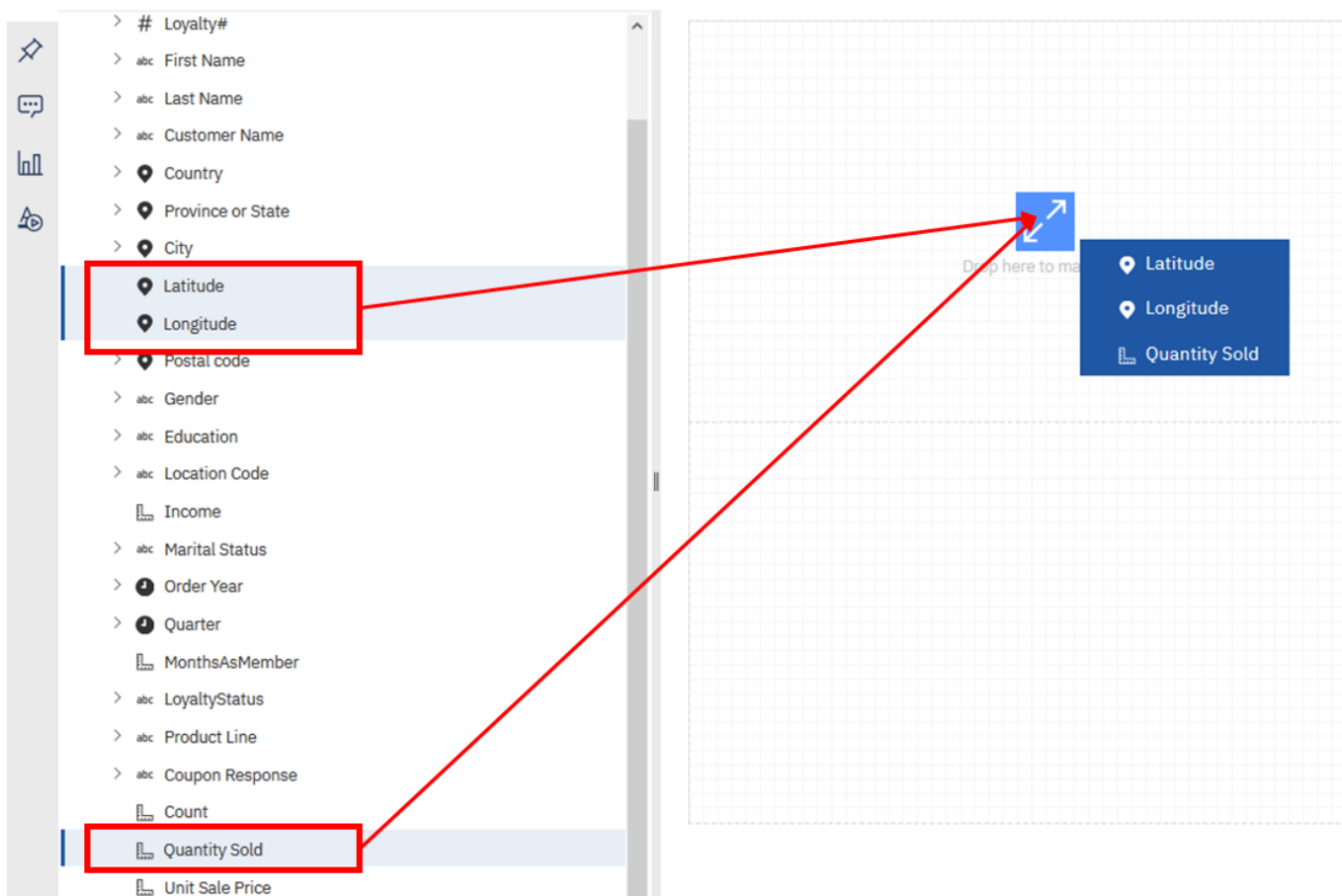
## Task A : Using an Automatic Method to Create a Visualization for Panel 1

- 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.



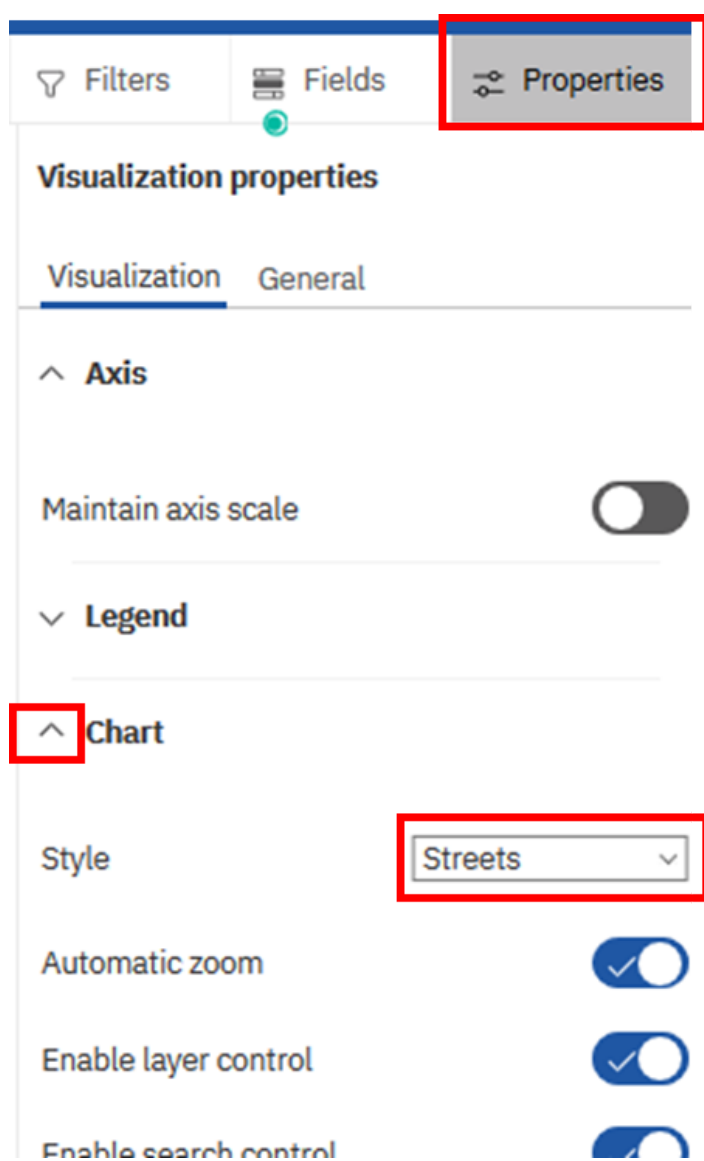
2. From the **Data Source** panel, expand CustomerLoyaltyProgram.csv, if needed.

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.

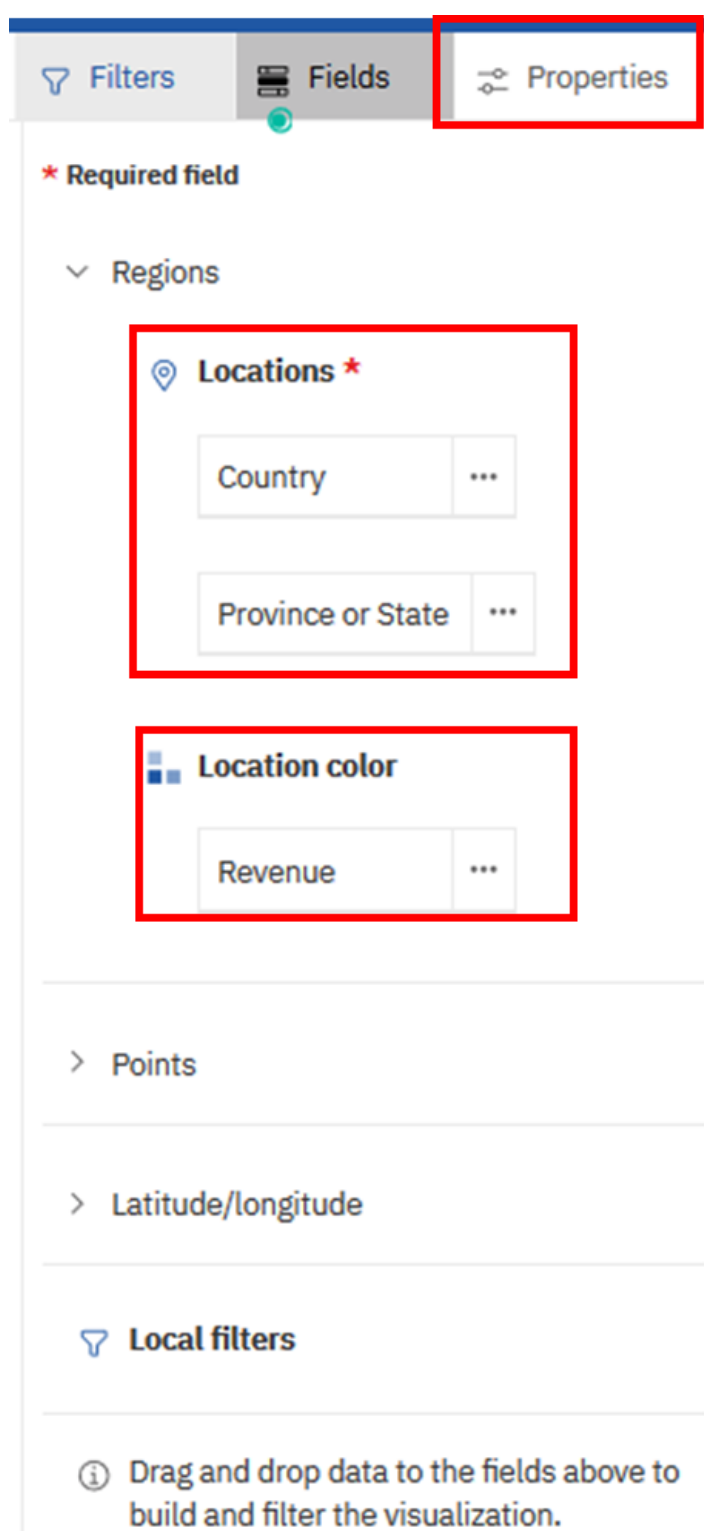


4. Click on the **Map chart in panel 1** to bring it into focus.

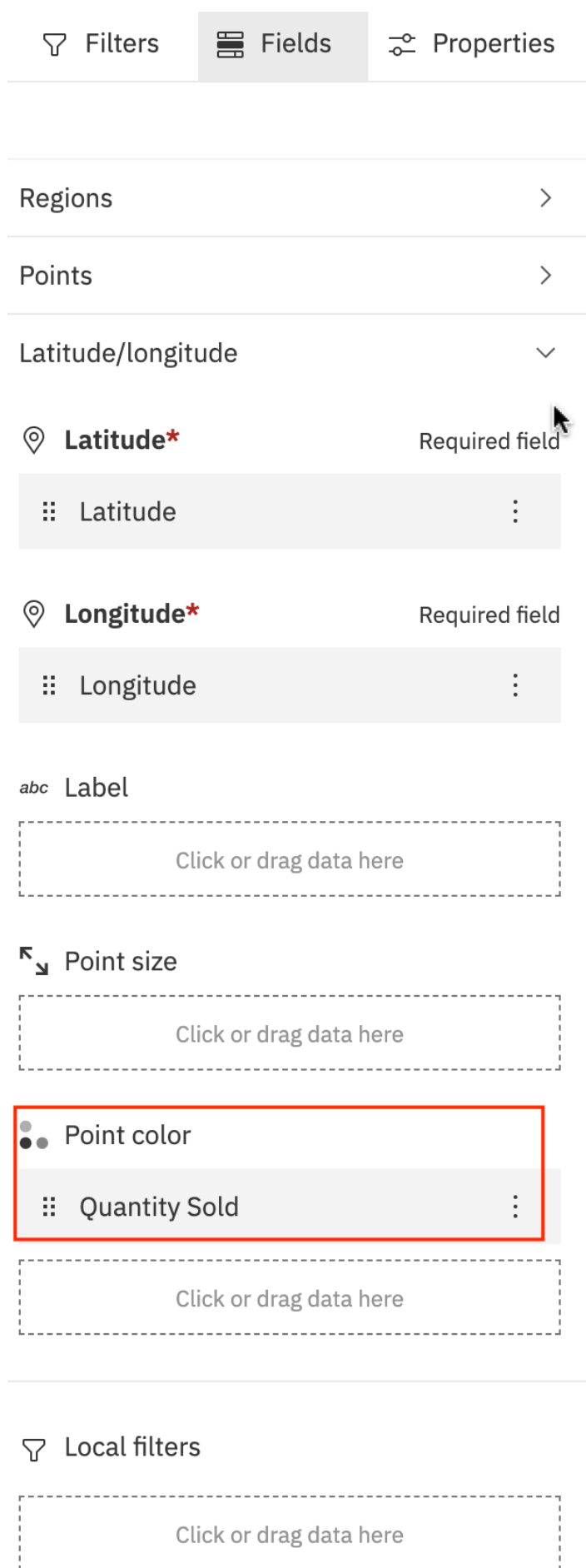
5. To change the map style, open the **Properties** panel and click the **down arrow next to Chart** to see the various options of maps available. Select **Streets** for **Style**.



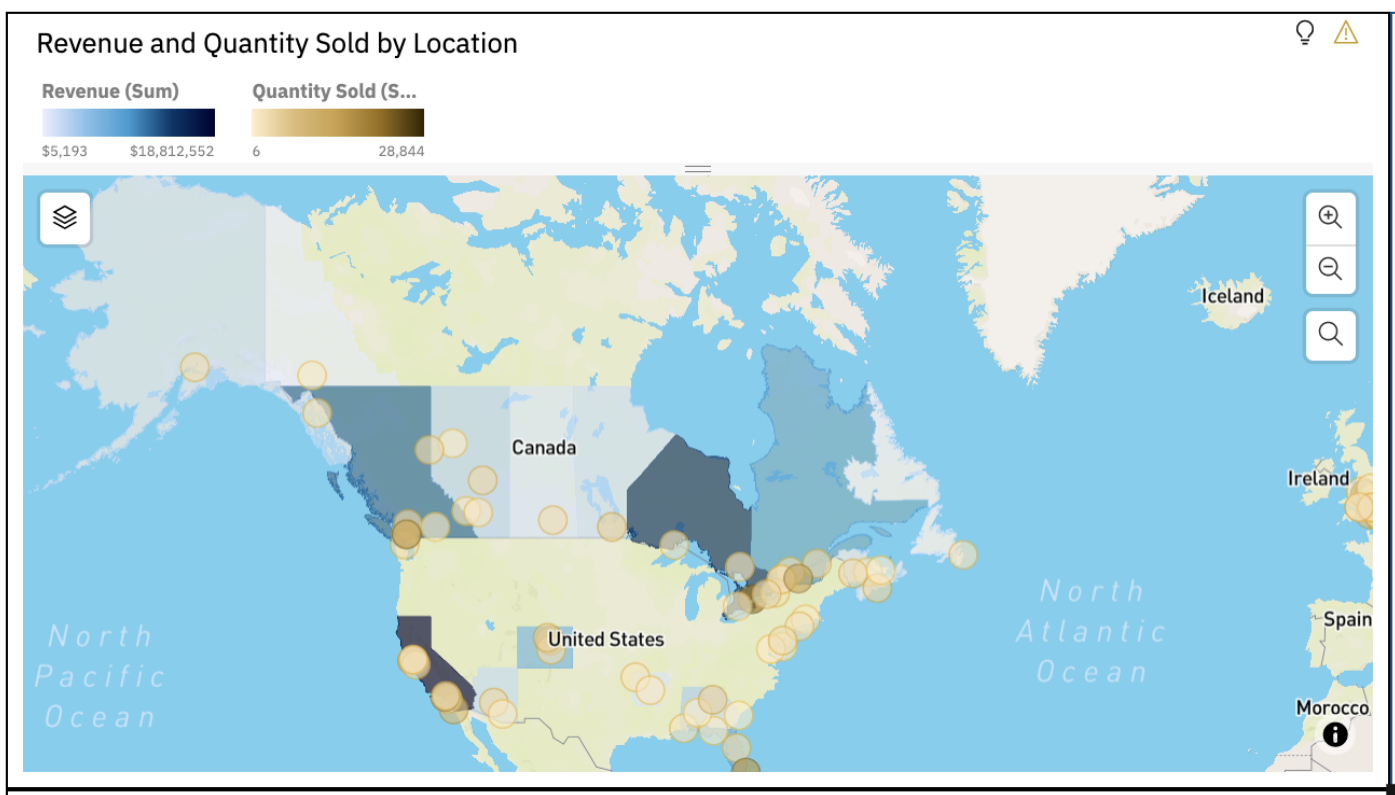
6. Open the **Fields** panel to view the data slots. From the **Sources** panel on the left of the screen, drag and drop the **Country**, **Province or State**, **Revenue** into the **Locations**, **Locations**, **Location color** data slots of **Regions** of the Fields panel respectively.



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

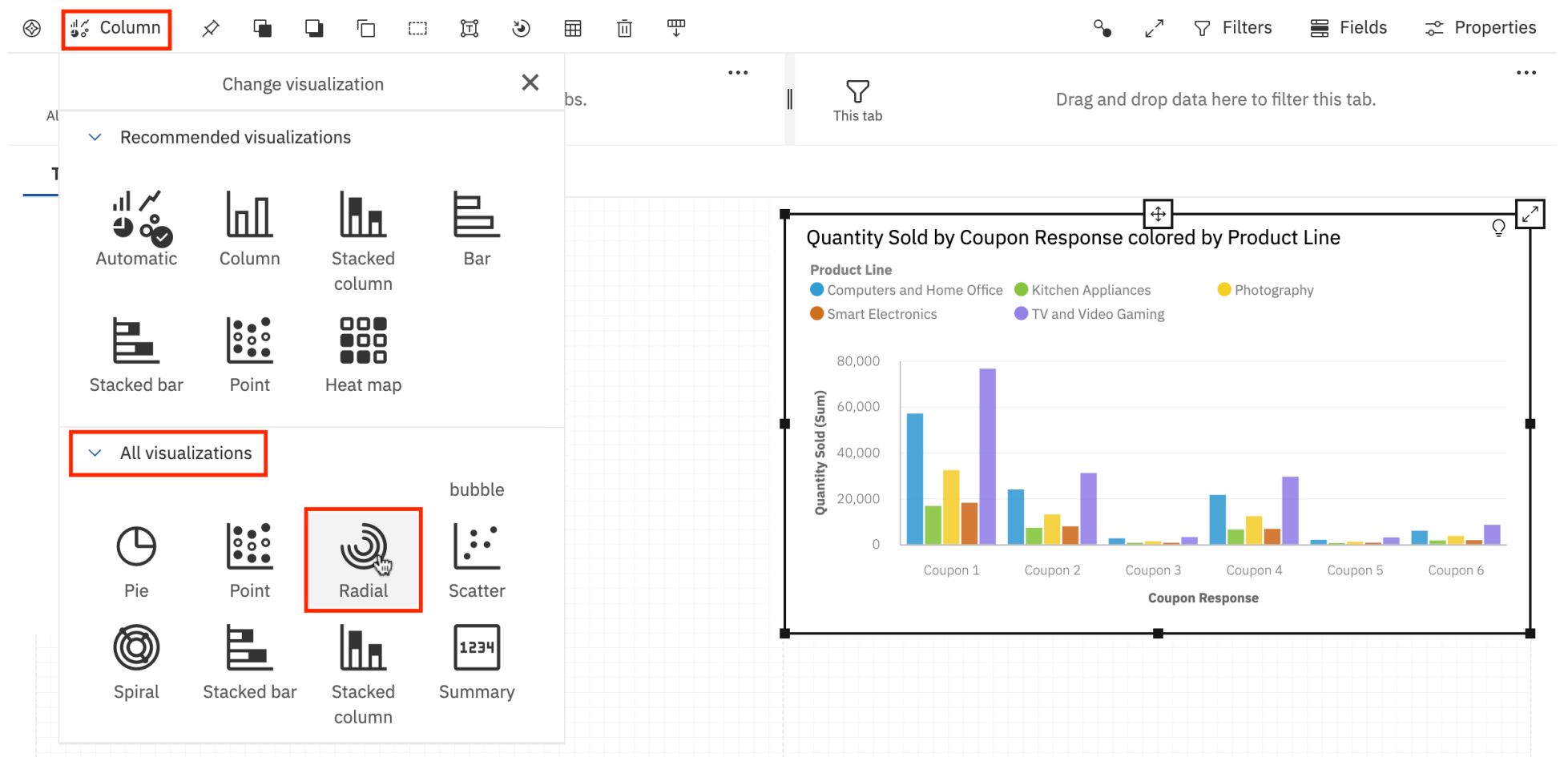


8. Click on the **Fields** button to close the fields panel.
9. Click on the **Map chart widget in Panel 1** to bring it into focus if needed. From the on-demand toolbar, click **Edit the title**. Enter the title "Revenue and Quantity Sold by Location" to the visualization.
10. Click the **Properties** 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.
11. To save the current work of the dashboard, press **CTRL+S**.
12. Your **Panel 1 widget** should look like the one below:

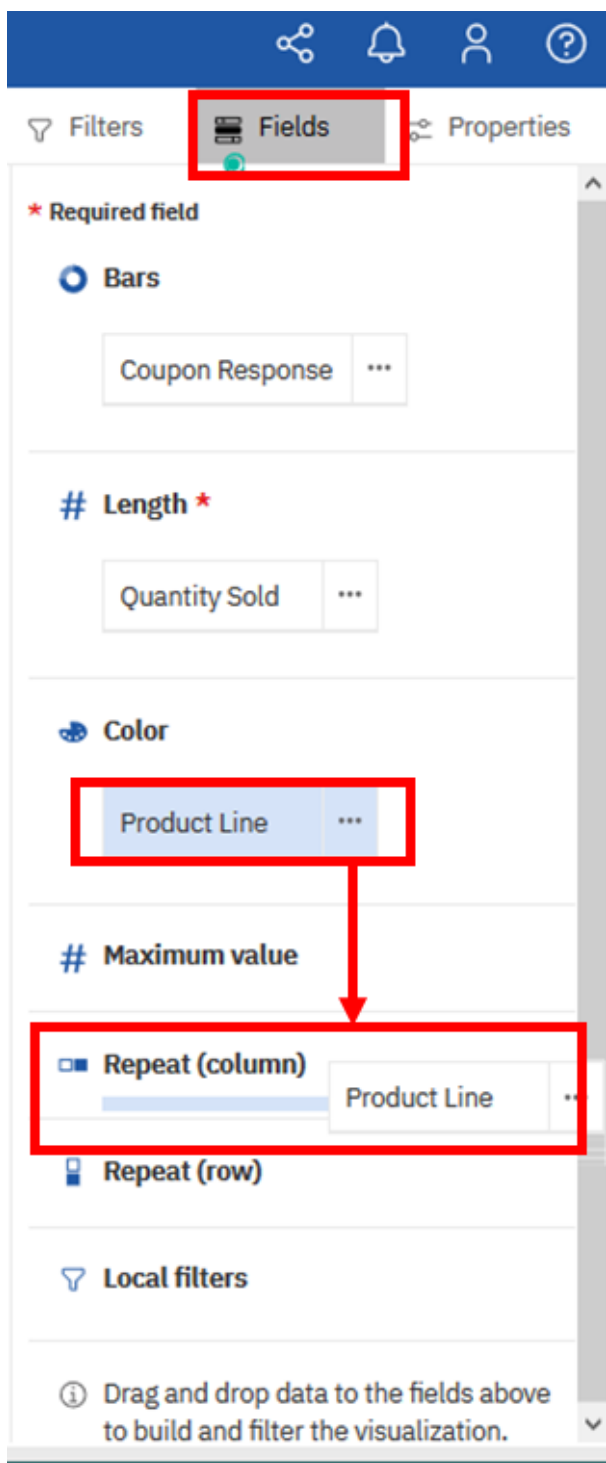


## Task B : Using an Automatic Method to Create a Visualization for Panel 2

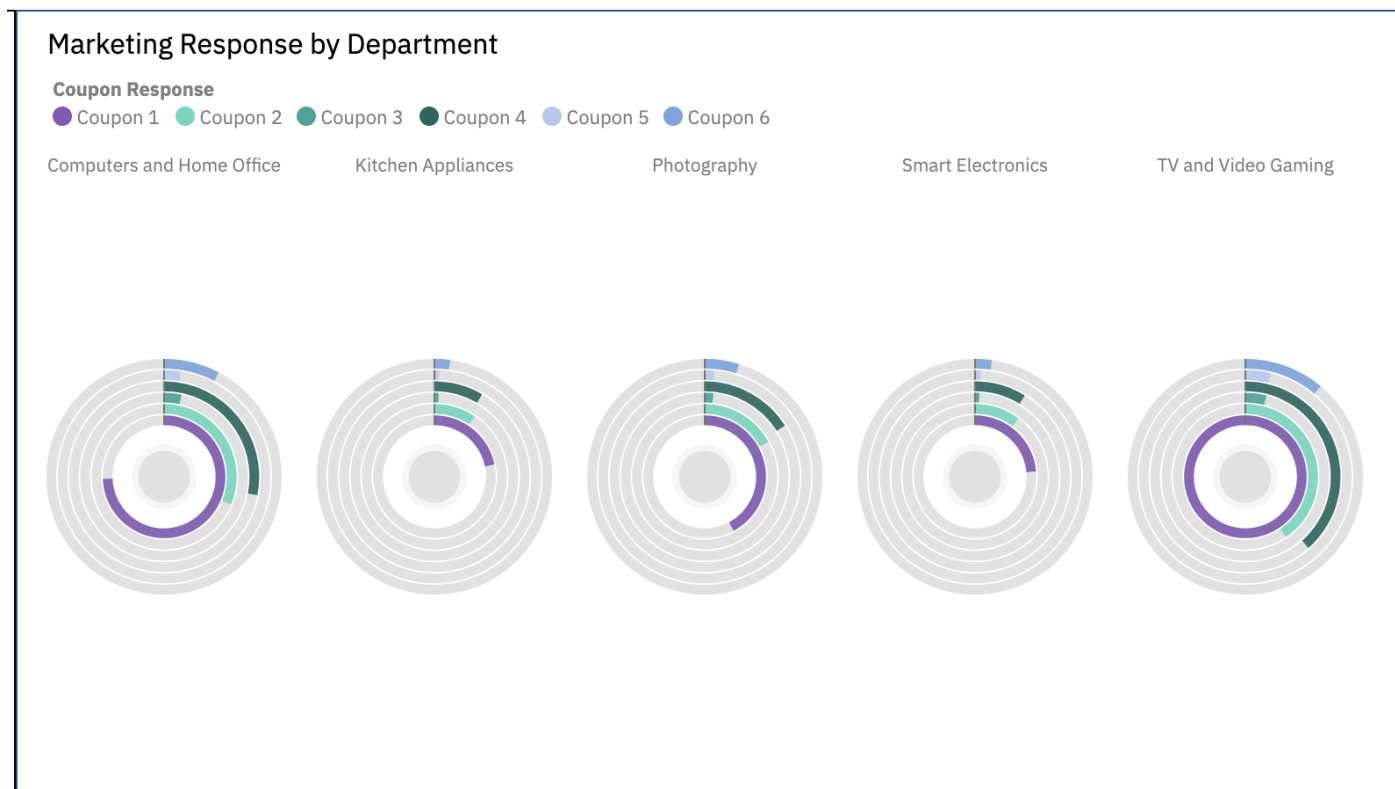
1. From the **Data Source** panel, press **CTRL** and select **Product Line**, **Coupon Response**, **Quantity sold** and drag them to the center of **Panel 2**, releasing them once you see the **drop zone turn blue**.
2. Click on the **Line chart in panel 2** to bring it into focus and render the **on-demand 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.



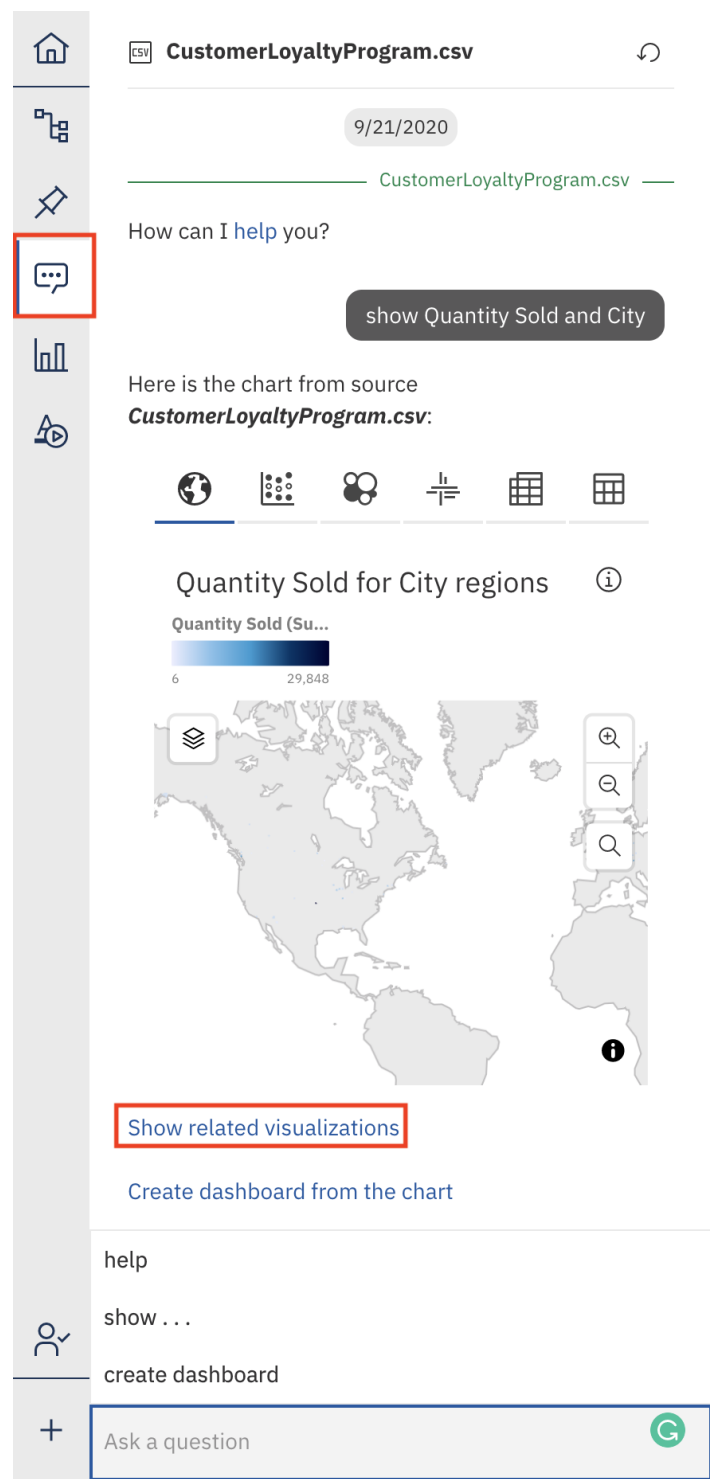
6. Next, move the **Coupon Response** to the **Color** field.
7. Click on the **Fields** button to close the fields panel.
8. Click on the **Radial chart widget in Panel 2** to bring it into focus. From the on-demand toolbar, click **Edit the title**. Enter the title "Marketing Response by Department" 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:



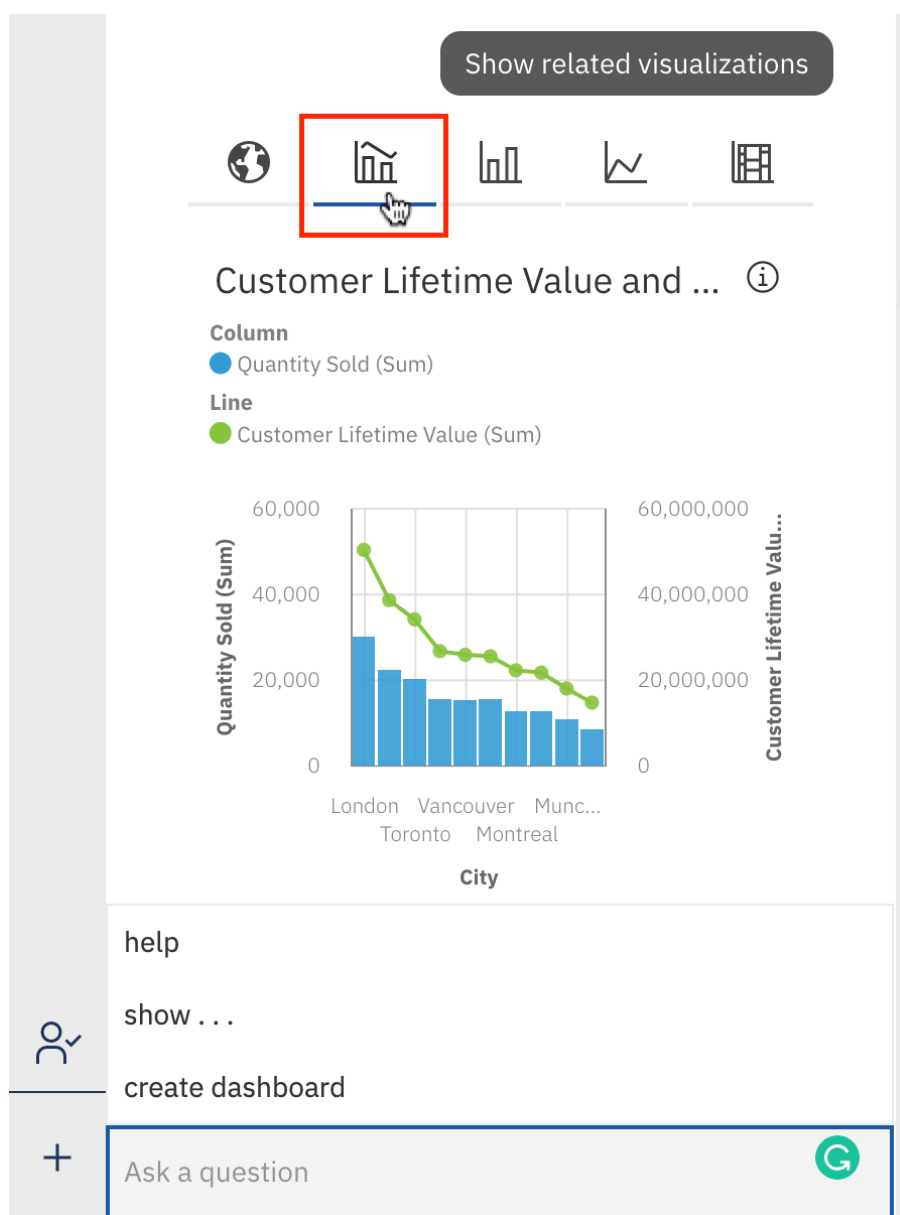


# Task C : Using Cognos Assistant to Create a Visualization for Panel 3

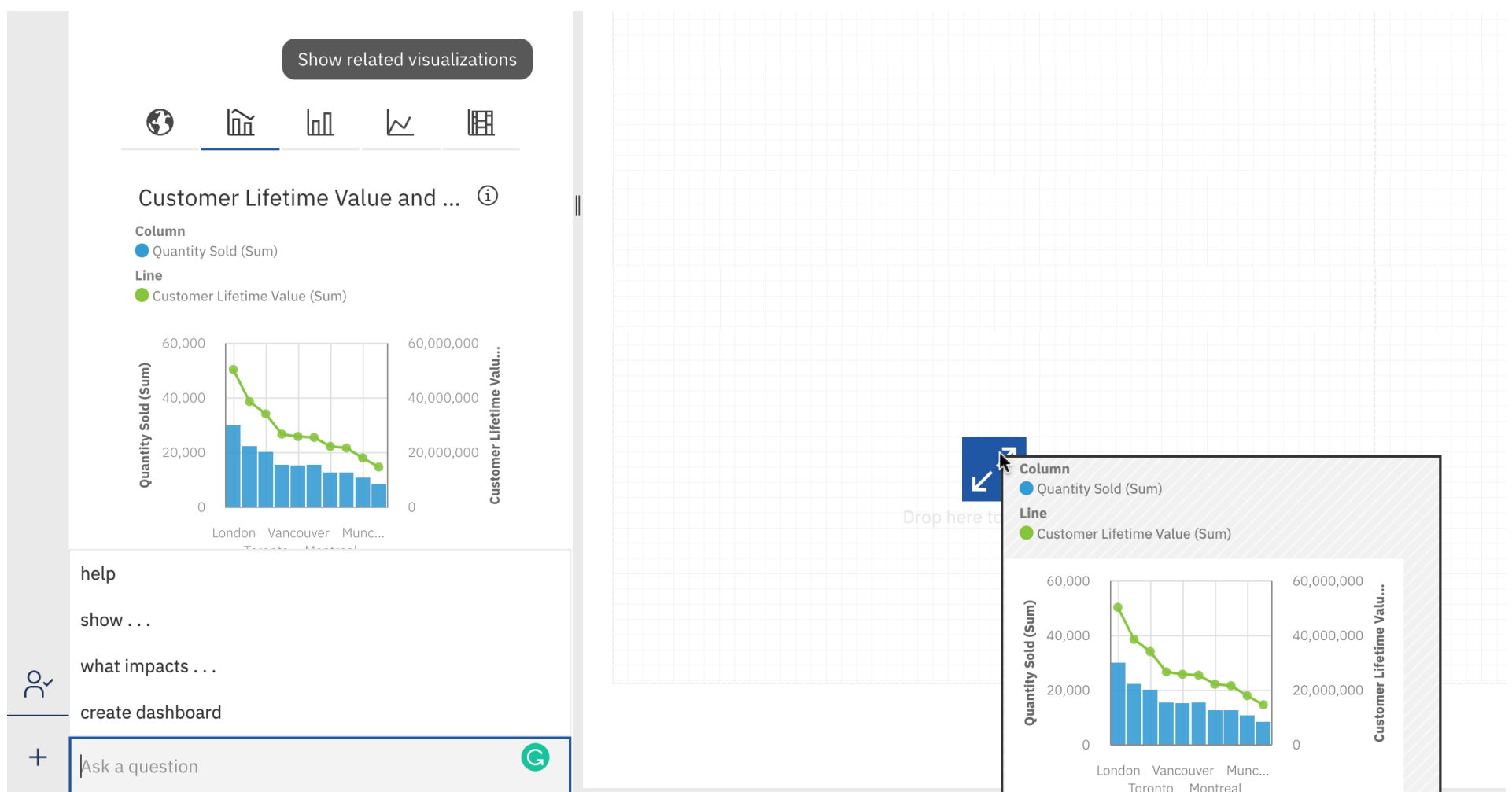
- 1. From the **Navigation** panel, select **Assistant** to open the **Cognos Assistant** panel.
- 2. In the **Ask a question** input text box, at the bottom of the left hand pane, type "**show Quantity Sold and City**" and press **Enter**.
- 3. Click on **show related visualizations**.



- 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**.

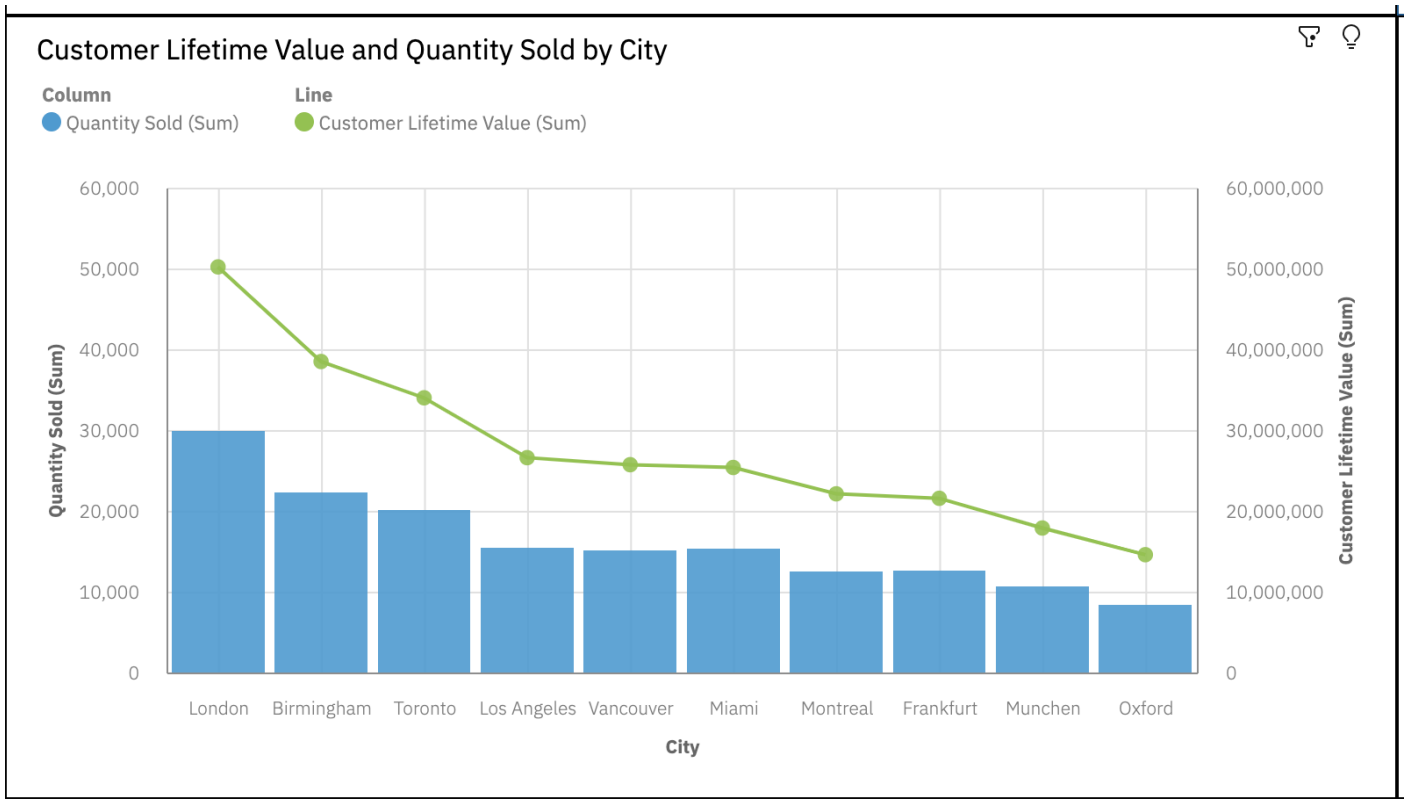


6. Click on the **Line and column chart** in **Panel 3** if needed to bring it into focus.

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.

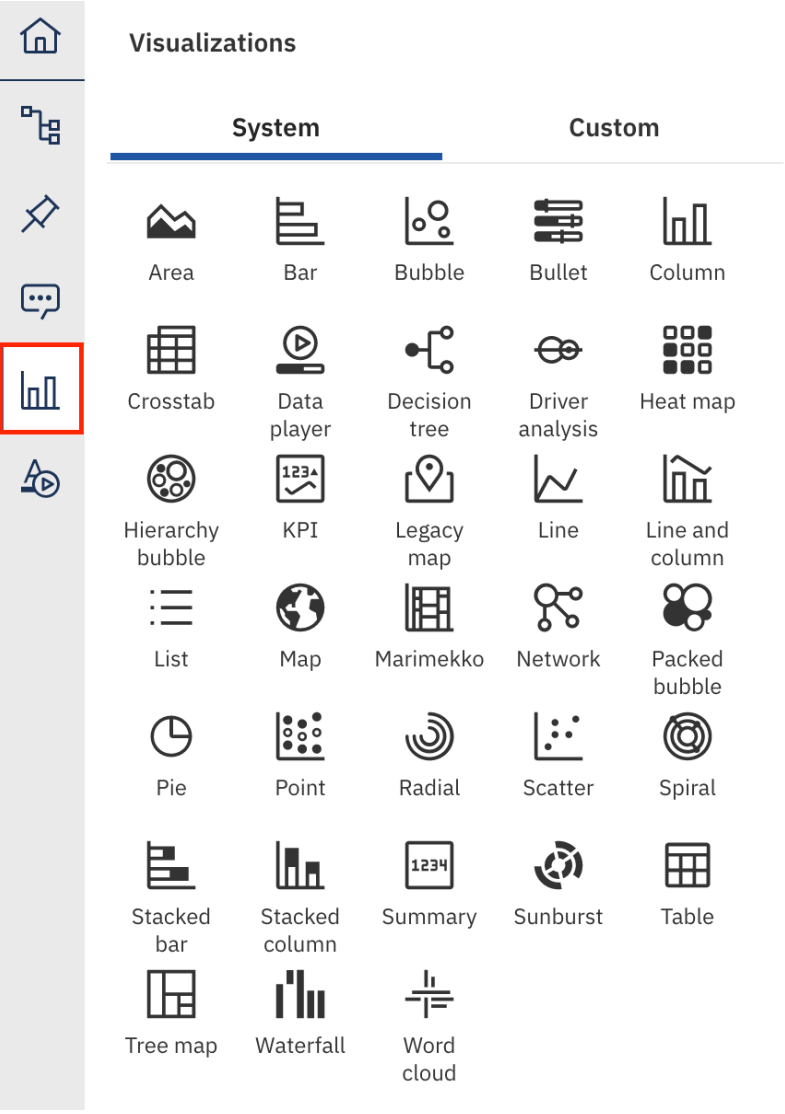
8. To save the current work of the dashboard, press **CTRL+S**.

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



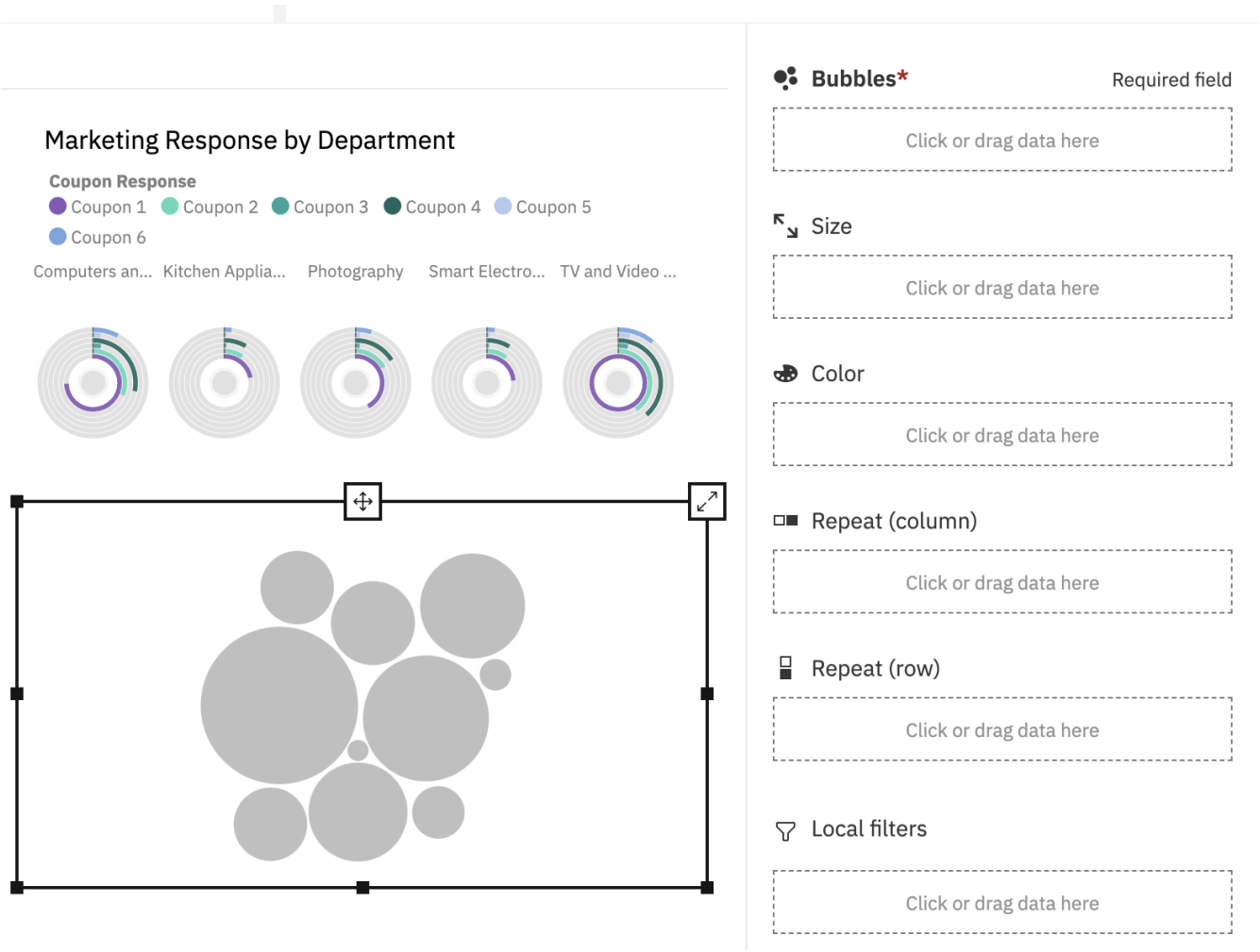
# Task D : Using a Manual Method to Create a Visualization for Panel 4

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

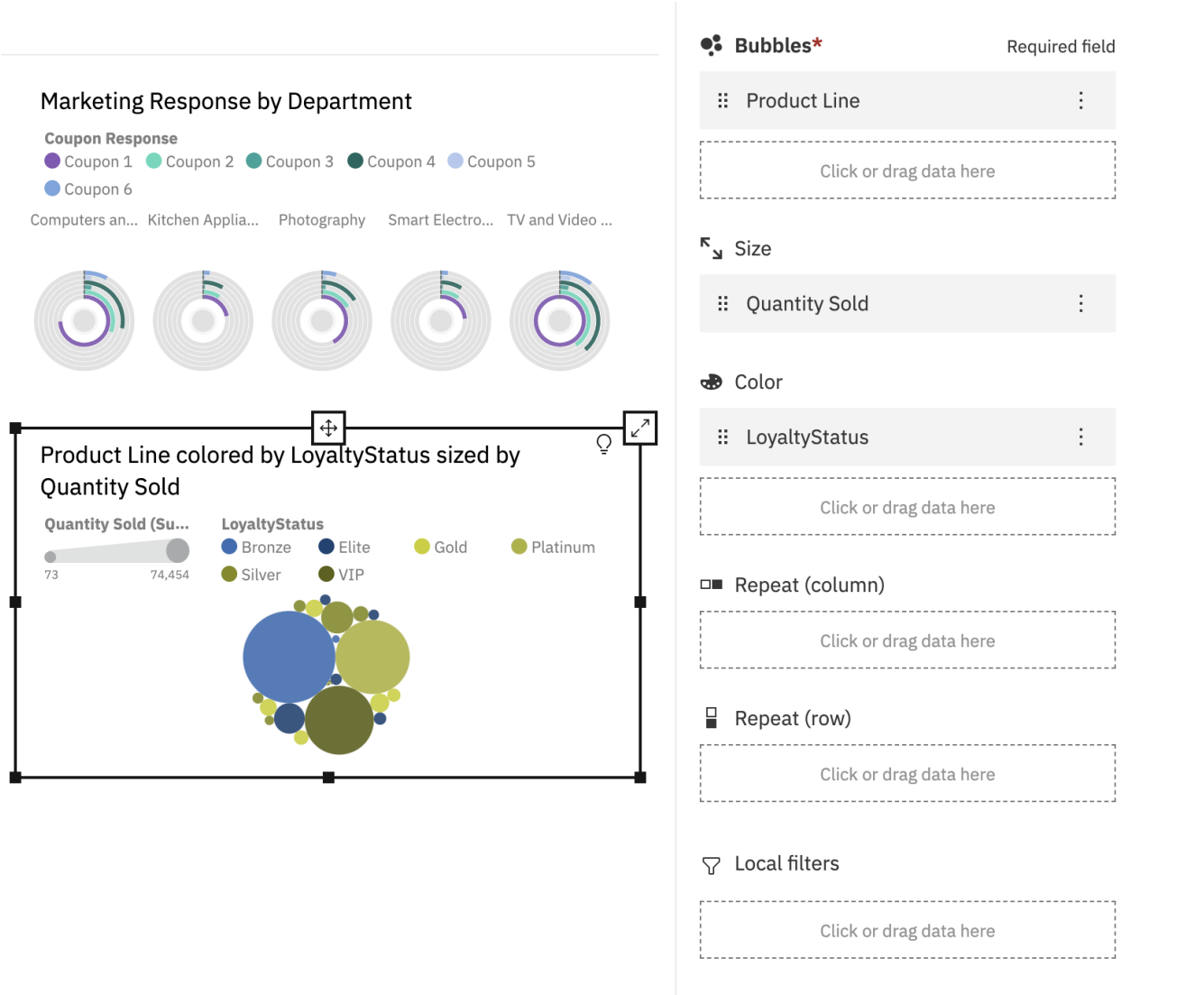


2. Select the **Packed Bubble** chart, and drag it to the center of **panel 4** of the dashboard template, releasing it once you see the **drop zone turn blue**.

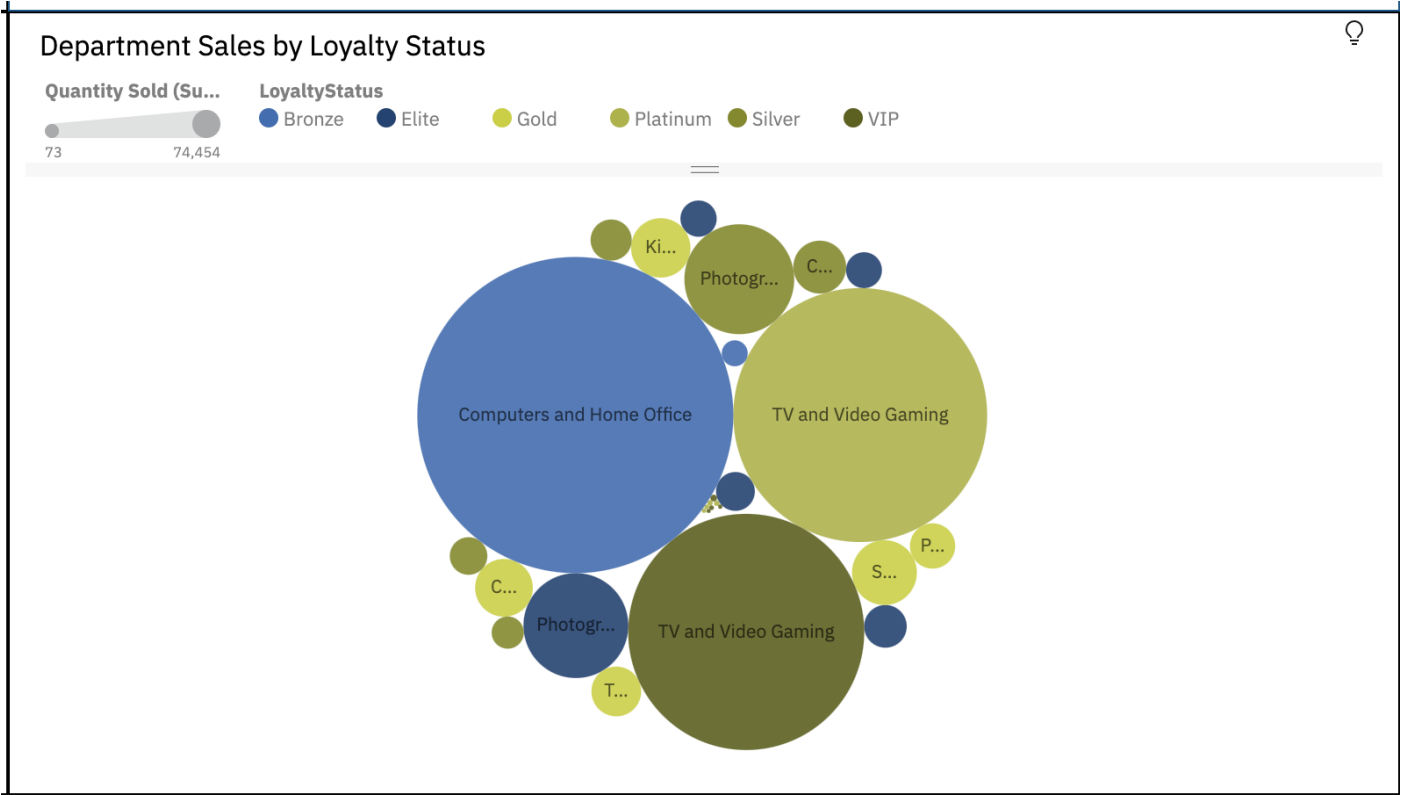
3. The Packed Bubble chart visualization will open along with the **Fields** panel for you to set up the data definitions for your visualization.



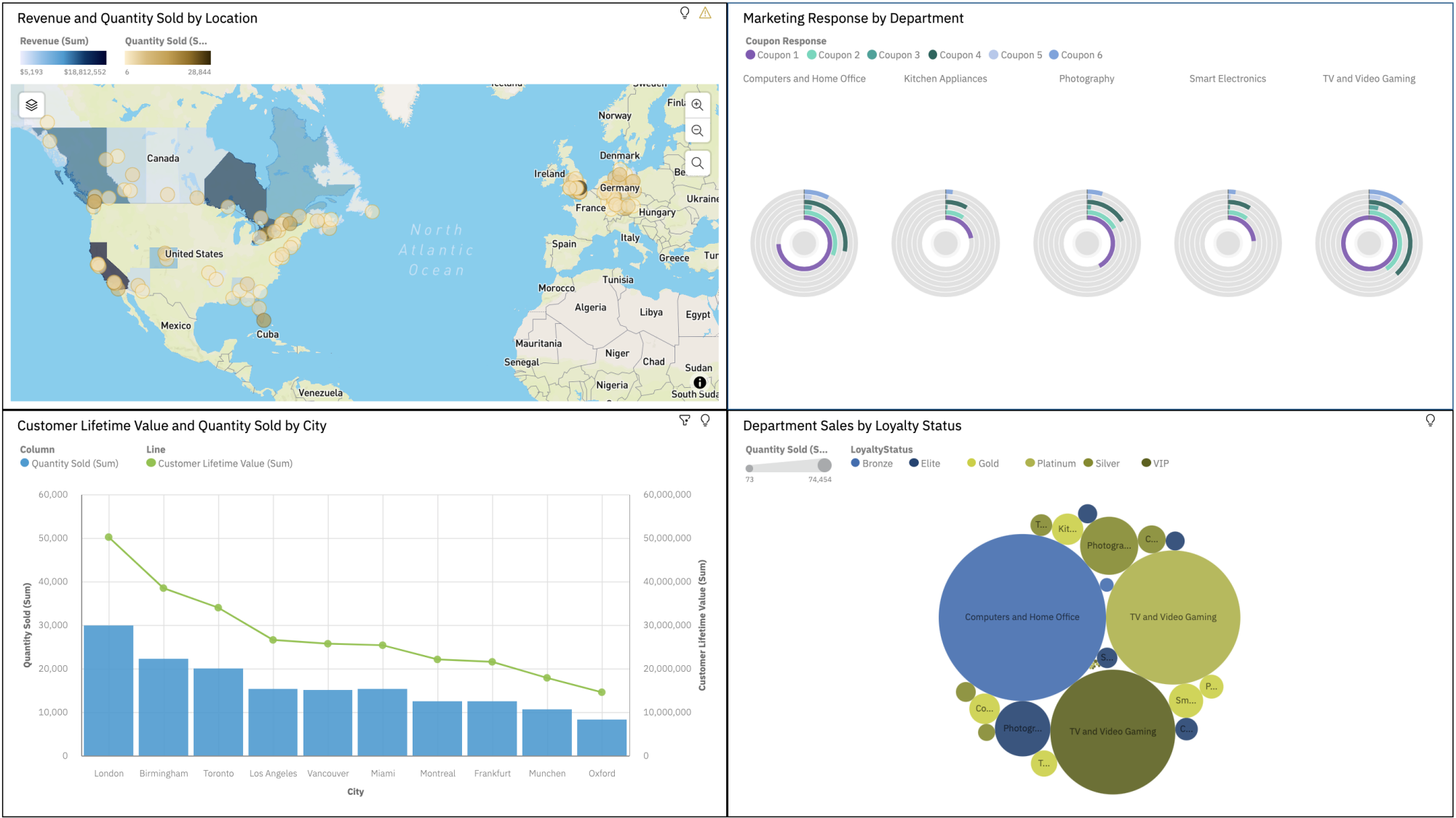
4. From the **Sources** panel on the left of the screen, drag and drop the **Product Line**, **Quantity Sold**, **Loyalty Status** sources into the **Bubbles**, **Size**, **Color** data slots of the Fields panel respectively.



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

- [Sandip Saha Joy](#)

Other Contributor(s)

- [Steve Ryan](#)

Changelog

Date	Version	Changed by	Change Description
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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