

# Shri Ramswaroop Memorial University



**Case Study  
on**

**Financial Forecasting and Profitability  
Report**

**SUBMITTED TO:  
Mr. Ujjawal Tomar**

**SUBMITTED BY:**  
**Name: Ritesh Kumar Giri**  
**202410702080007**  
**Name: Shalu Ujjain**  
**202410702080008**  
**Name: Pragya Gupta**  
**202410702080009**

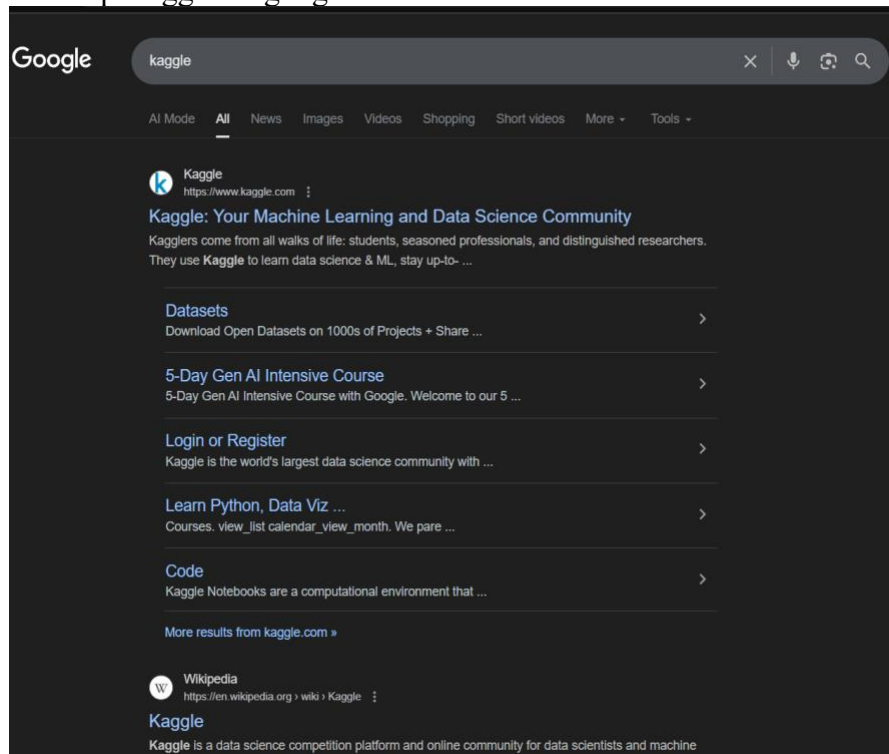
**Definition:** Develop an automated financial reporting system in IBM Cognos Analytics that provides revenue forecasts, expense analysis, and profitability trends for strategic decision-making.

**Required Tool:** IBM Cognos, Kaggle

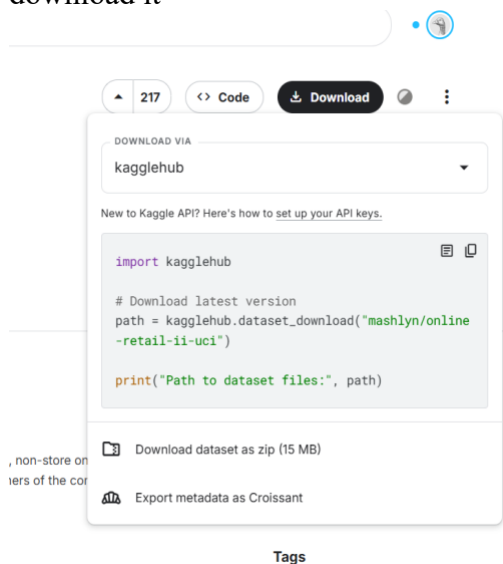
**Working:** We will be downloading data from Kaggle and using it to make dashboard in IBM Cognos

## Steps:

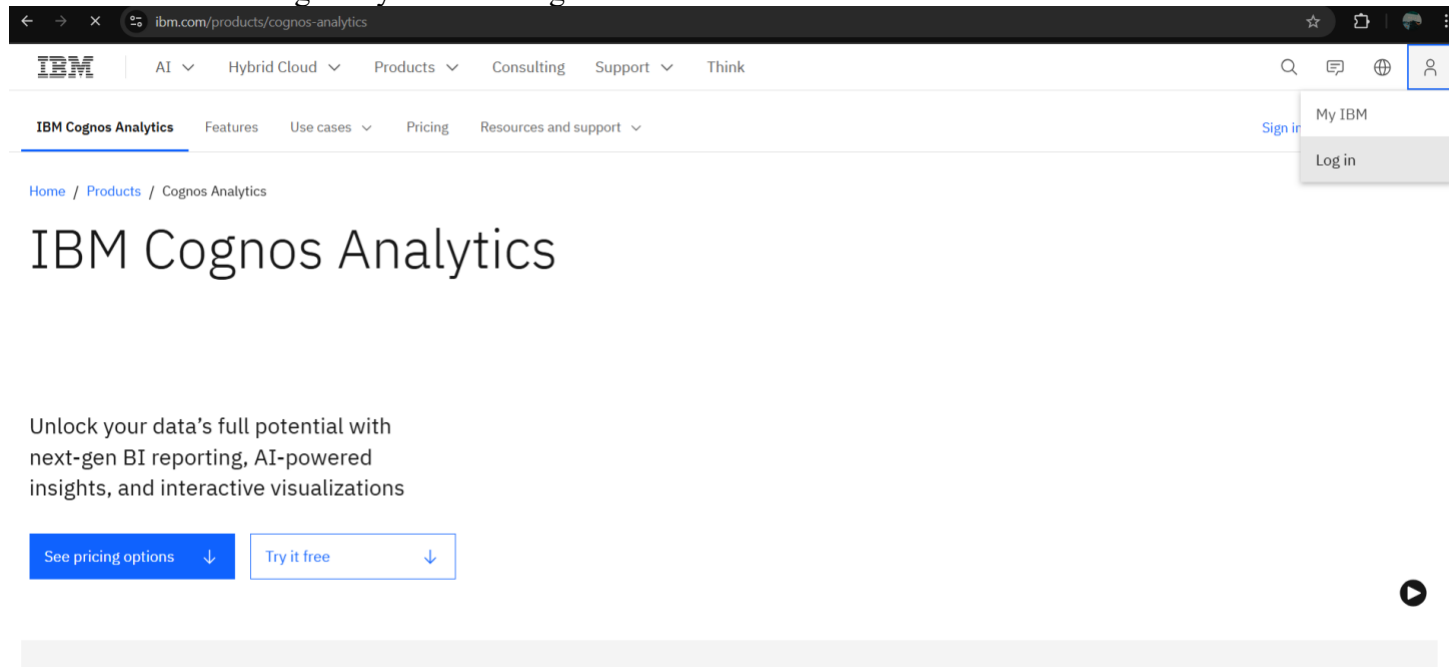
Look up Kaggle on google and click on the first link



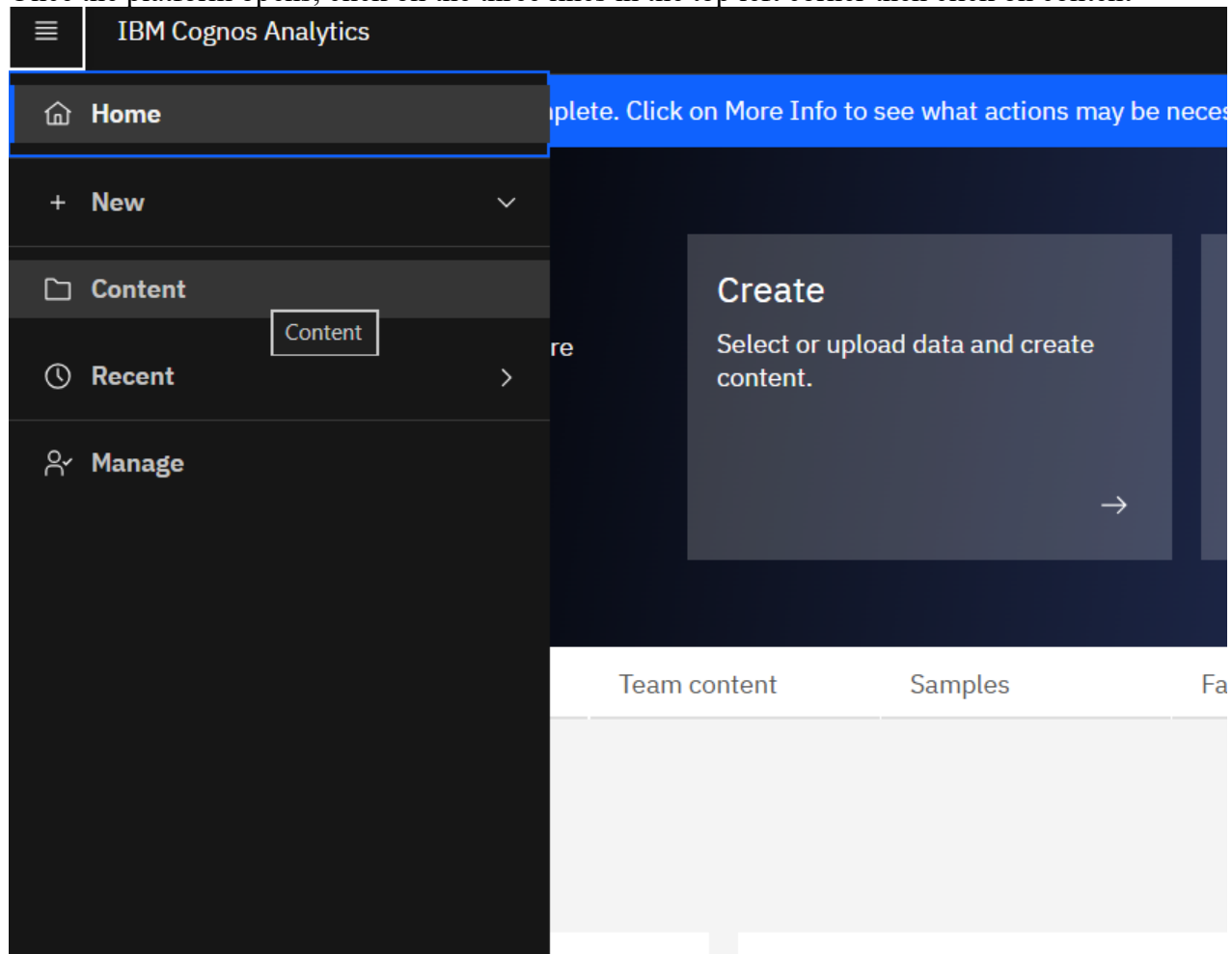
Login on the platform with google and lookup for Financial data and find the file you feel appropriate and download it



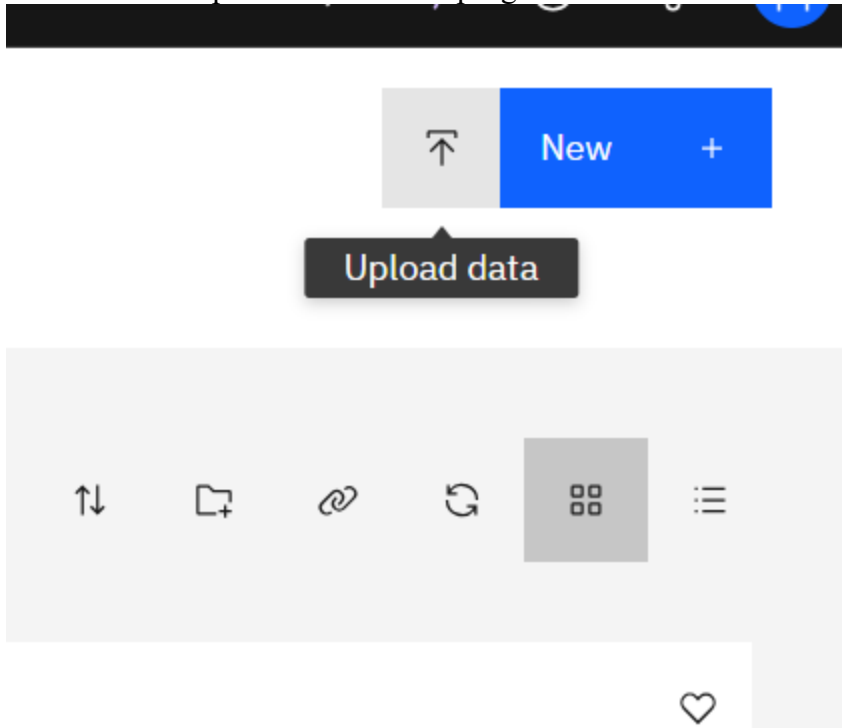
Extract the file then login to your IBM Cognos account



Once the platform opens, click on the three lines in the top left corner then click on content

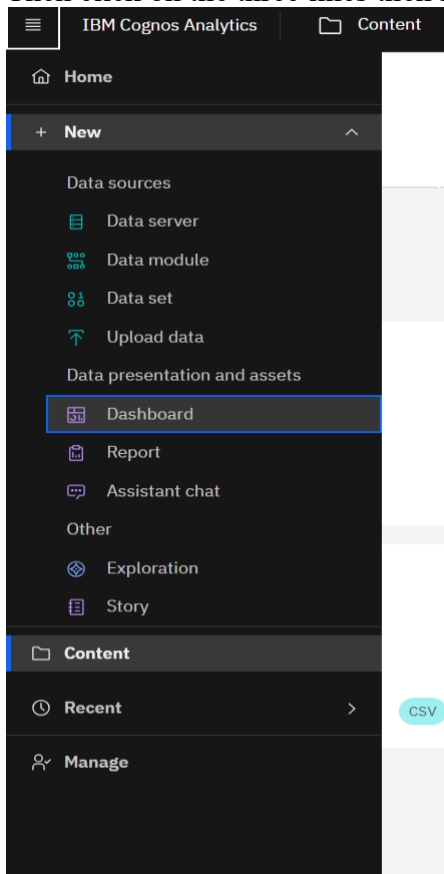


Then click on Upload data in the top right corner



Select the file you will be using to make the dashboard then wait for it to be uploaded completely

Then click on the three lines then New in top left corner then on dashboard



## Select the blank Templet then click on Create

IBM Cognos Analytics | Create dashboard

Create a dashboard

Select a template for your dashboard

Cancel Create

Tabbed Infographic Responsive

## Then click on “Select a source”

IBM Cognos Analytics | \* New dashboard

Edit

Data

Visualizations

Select a source

Click select a source to add data to use to build a dashboard.

Select a source +

Tab 1

Then on “My Content”

Select a source

My content

Team content

Name	Type	Last Modified
<div><div></div><div>HR_Analytics.csv</div><div>CSV</div></div>	Uploaded file	9/9/2025, 5:23 AM
<div><div></div><div>teleCust1000t.csv</div><div>CSV</div></div>	Uploaded file	11/2/2025, 11:17 AM

Cancel

Add

Select the file you want, then click on add

Once the file is open, we can start building the dashboard.

We can add Visualizations to our dashboard through this panel

Visualizations

System

Custom

Area

Bar

Box plot

Bubble

Bullet

Column

For our purpose, which is to analyze the following:

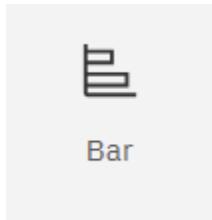
Revenue forecasts  
Expense analysis  
Profitability trends

We will use simple charts like:

Line Chart



Bar Chart



Stacked Column Chart



Line Chart



We will be splitting our dashboard into different tabs which will be for:

Profitability Overview  
Expense Analysis  
Revenue Forecast

For starters we will adjust the Theme of the dashboard

The screenshot shows the IBM Cognos Analytics dashboard editor interface. The main workspace is a dark grid labeled 'Tab 1'. On the right, the 'Properties' panel is open, showing various settings. The 'Color and theme' section is expanded, displaying the 'Visual theme' dropdown set to 'Carbon X Dark', and the 'Background color' section with 'Carbon X Dark' selected. Other visible settings include 'Show grid', 'Snap to grid', 'Snap to objects', 'Footer', 'Show footer', 'Filter panel', 'Tab labels', 'Cascading filter settings', 'Visualization header icons', and 'Advanced'.

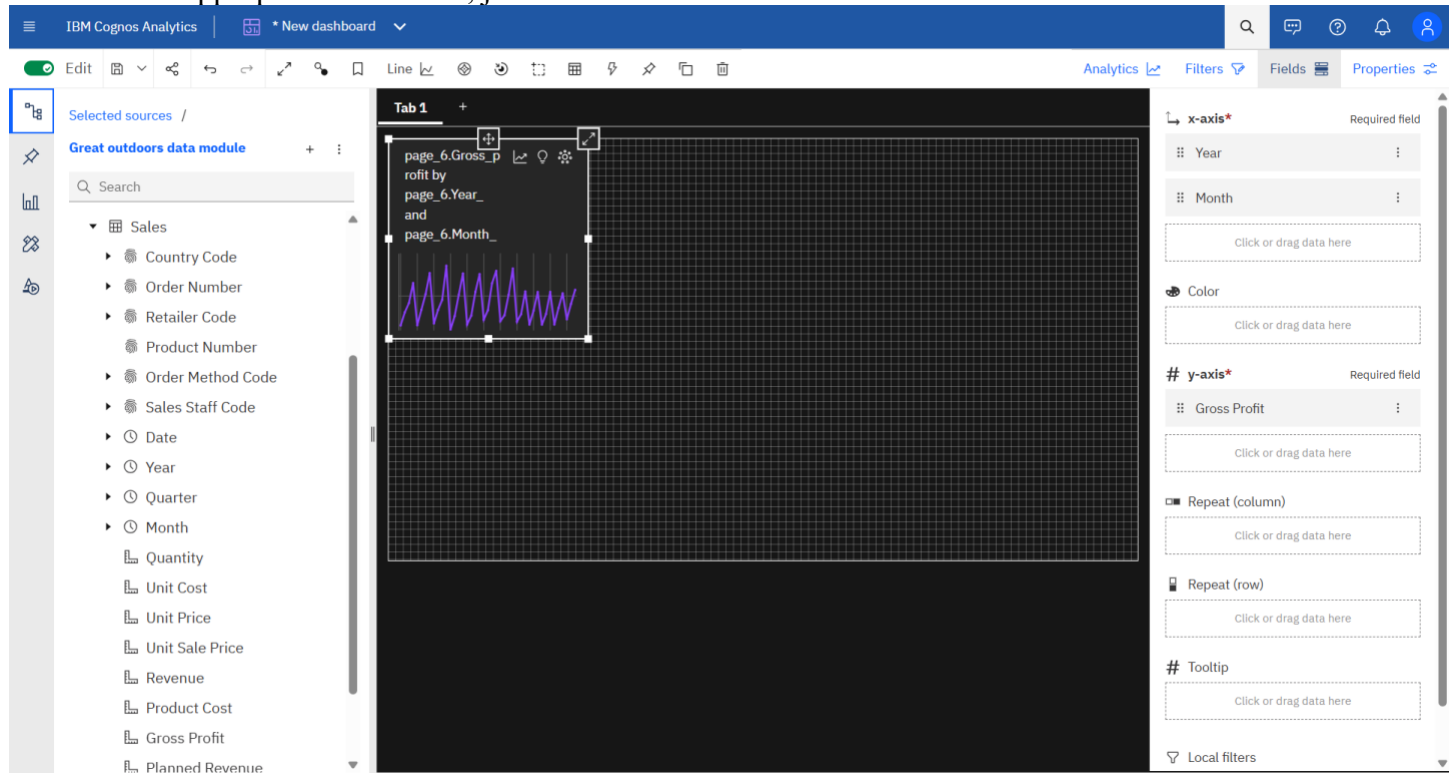
Now we will work on Tab 1

First we will use a Line Chart

The screenshot shows the IBM Cognos Analytics dashboard editor interface. The main workspace is a dark grid labeled 'Tab 1'. On the left, the 'Selected sources' panel is open, showing the 'Great outdoors data module' and a list of navigation paths: Branches, Retailers, Order Methods, Products, Returns, Sales Representatives, and Sales. On the right, the 'Properties' panel is open, showing the 'x-axis' and 'y-axis' fields, both labeled 'Required field' and with a placeholder text 'Click or drag data here'. Other visible settings include 'Color', 'Repeat (column)', 'Repeat (row)', 'Tooltip', and 'Local filters'.

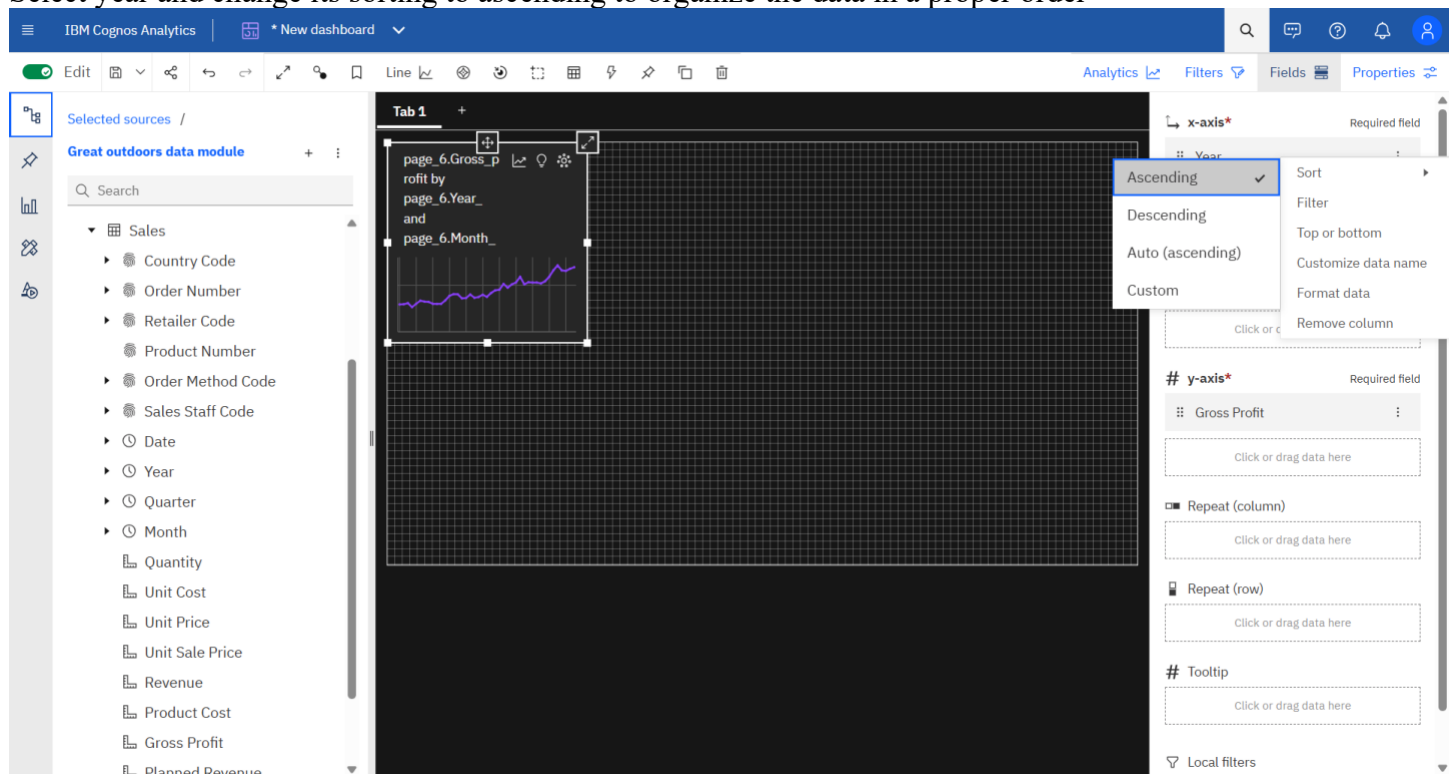


Then add the appropriate fields to it, just as such

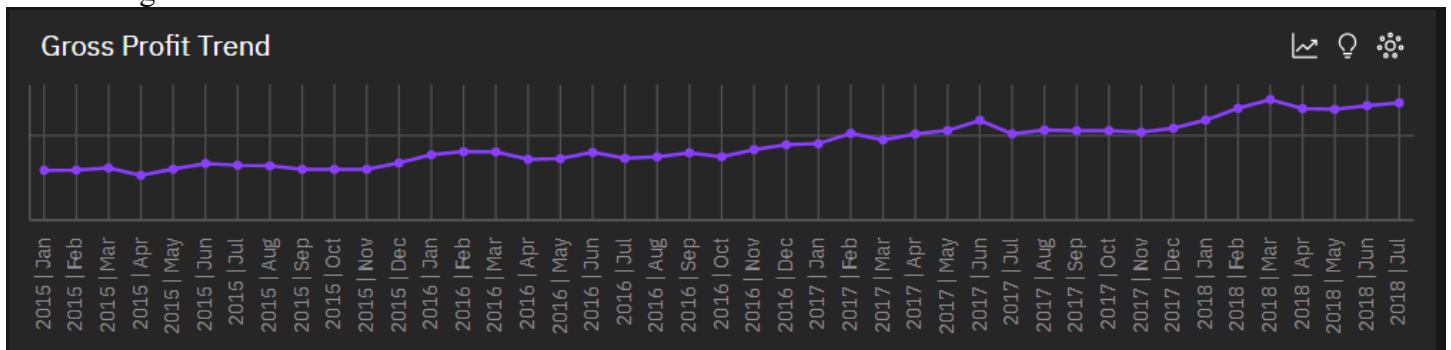


Make sure to change the sorting.

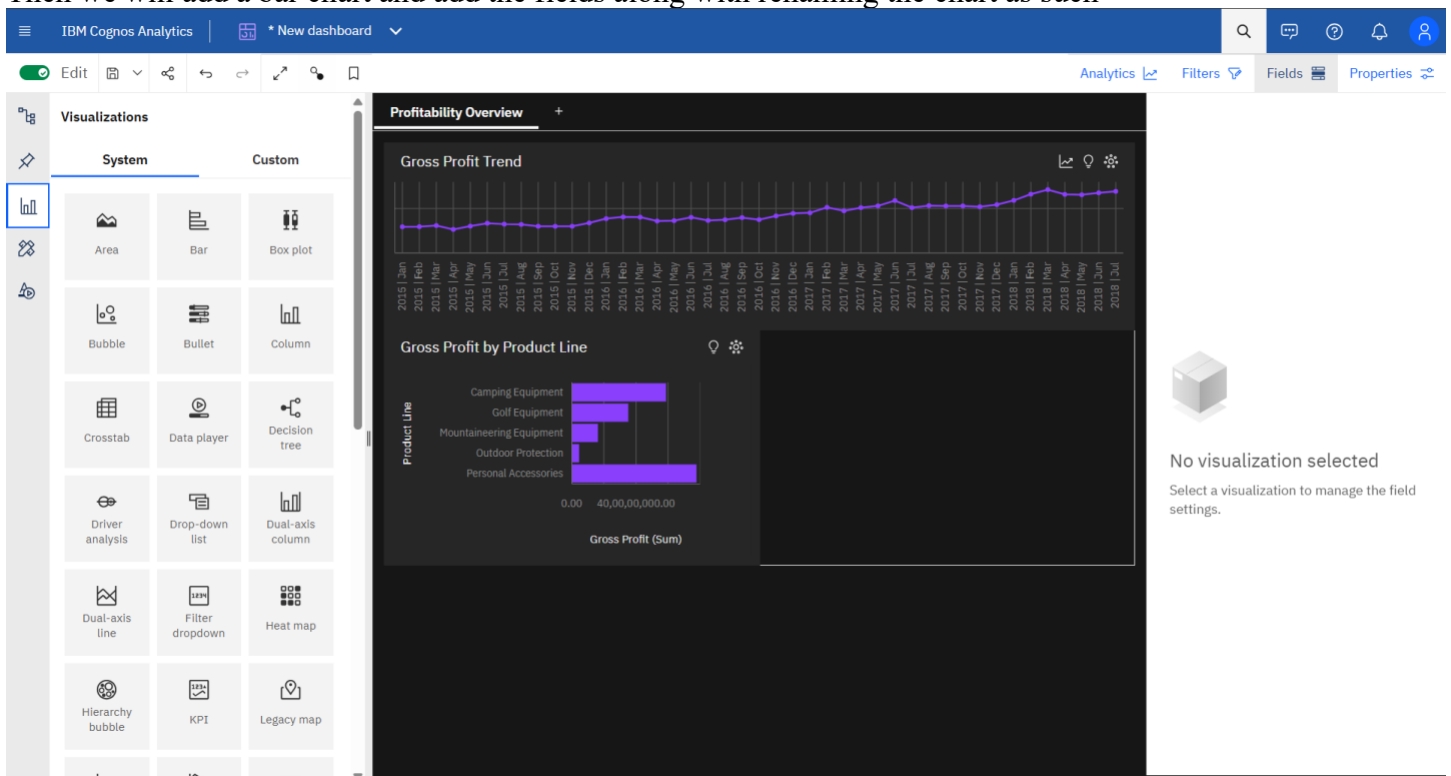
Select year and change its sorting to ascending to organize the data in a proper order



Then change the name/title of the chart and resize it

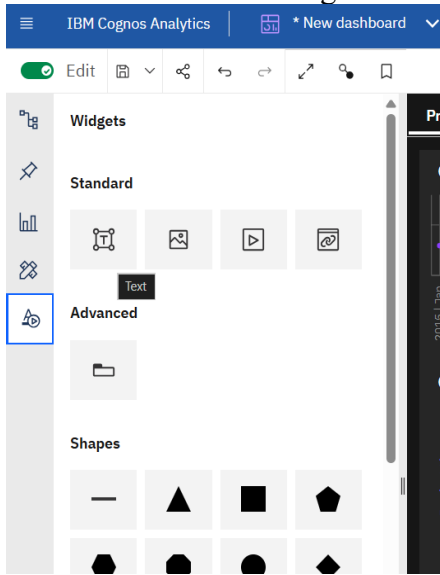


Then we will add a bar chart and add the fields along with renaming the chart as such

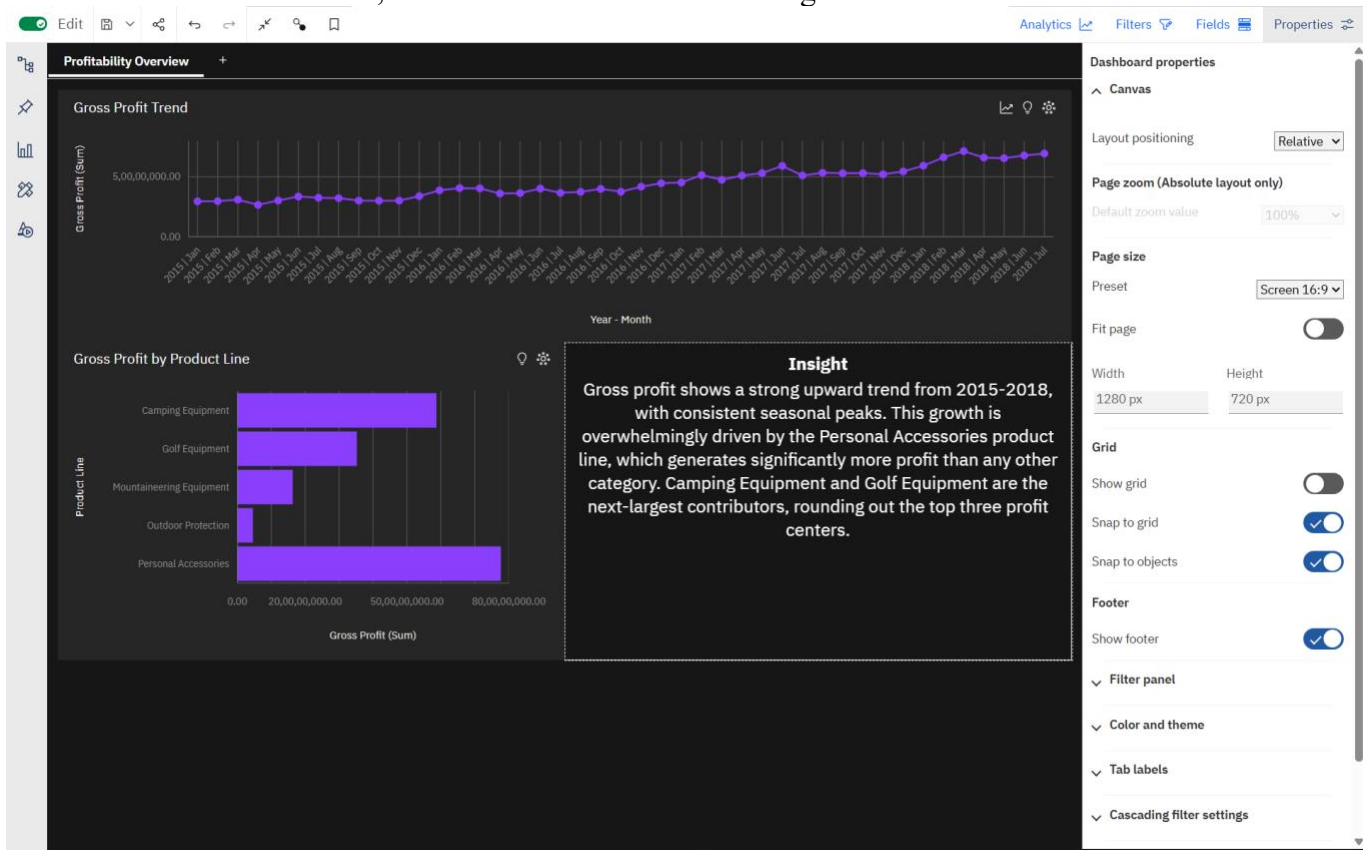


Then we will add text widget for adding our insight.

We can find the text widget from the widget panel

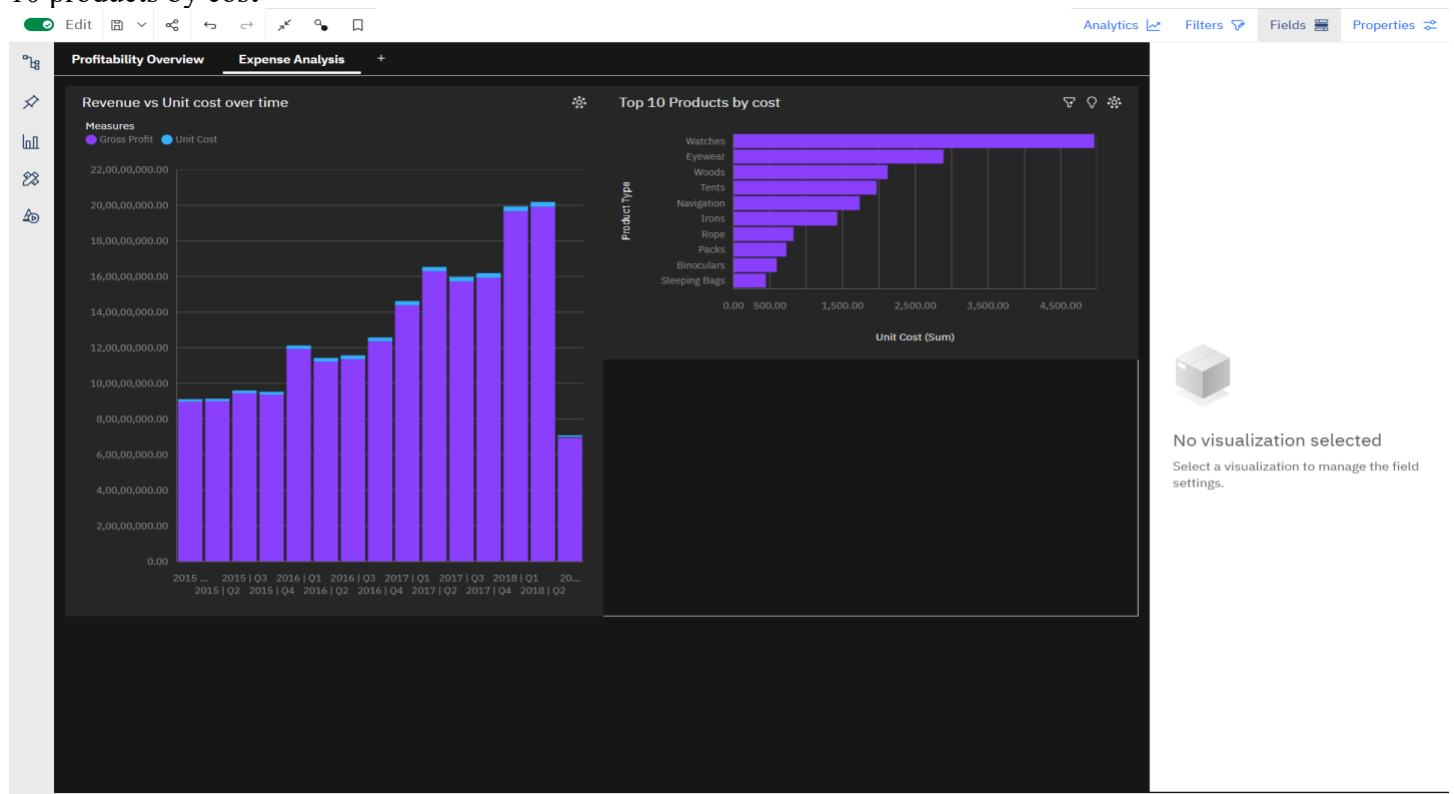


Once added to the dashboard, we can resize it and add the insight we want

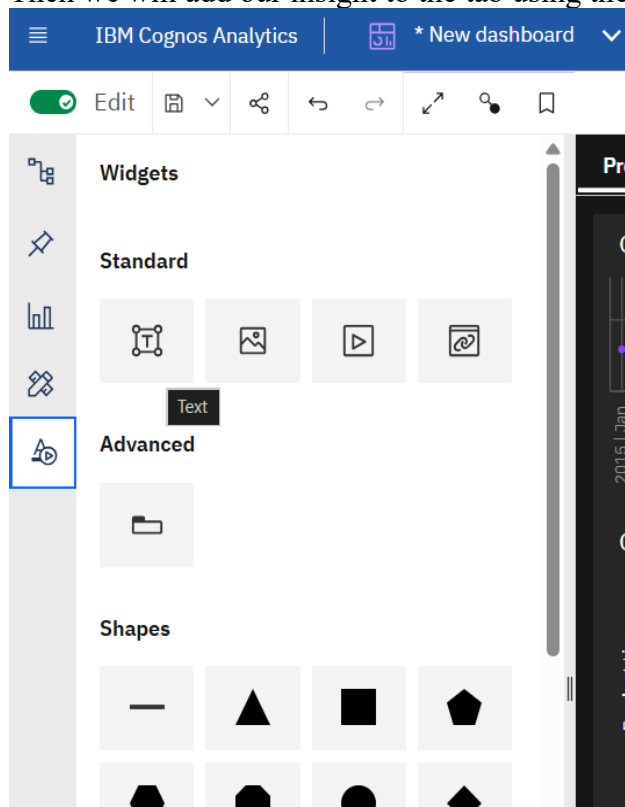


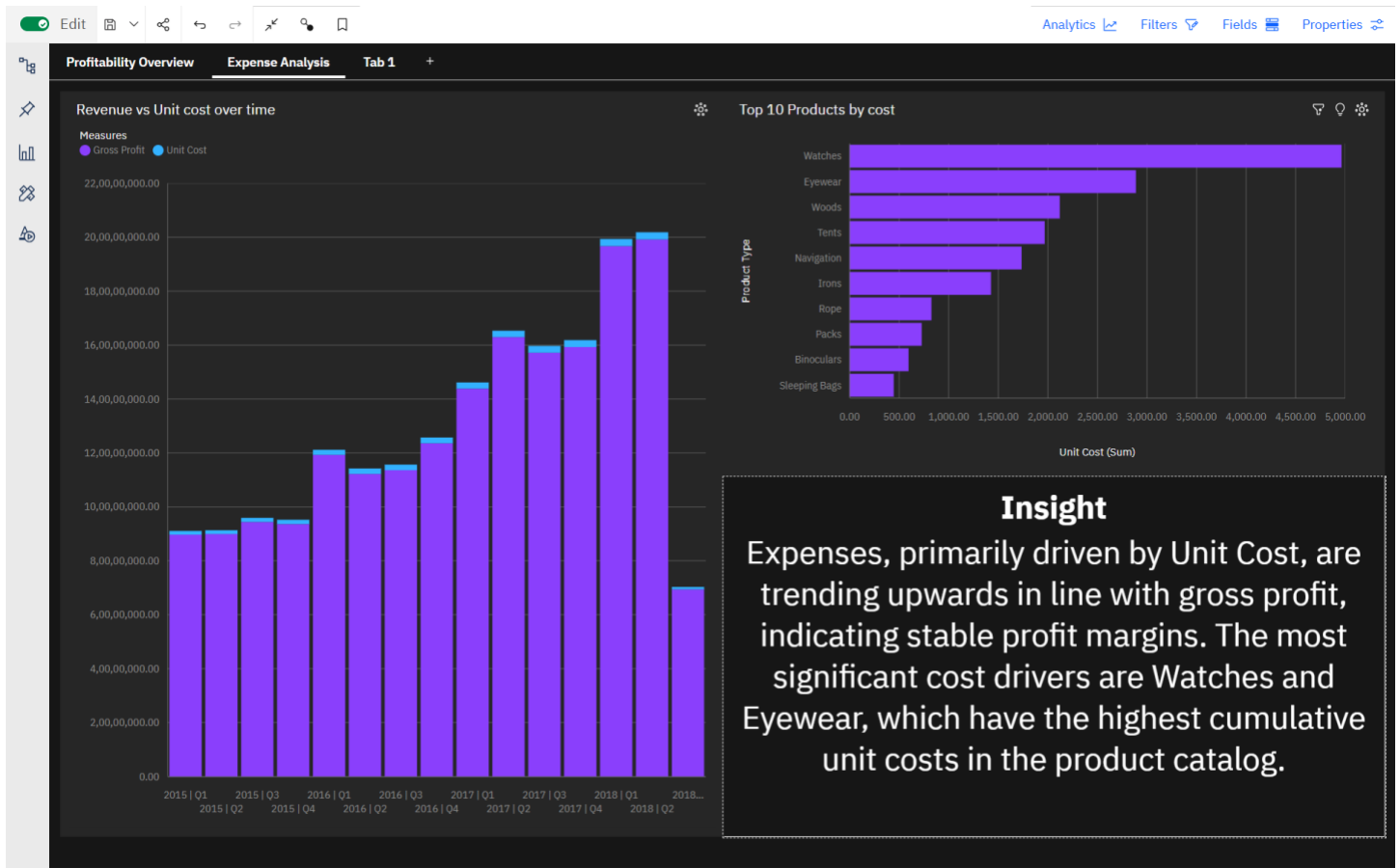
For next tab we will be working on Expense Analysis

For this we will be using a stacked column chart to show the revenue vs unit cost and a bar chart to show the top 10 products by cost



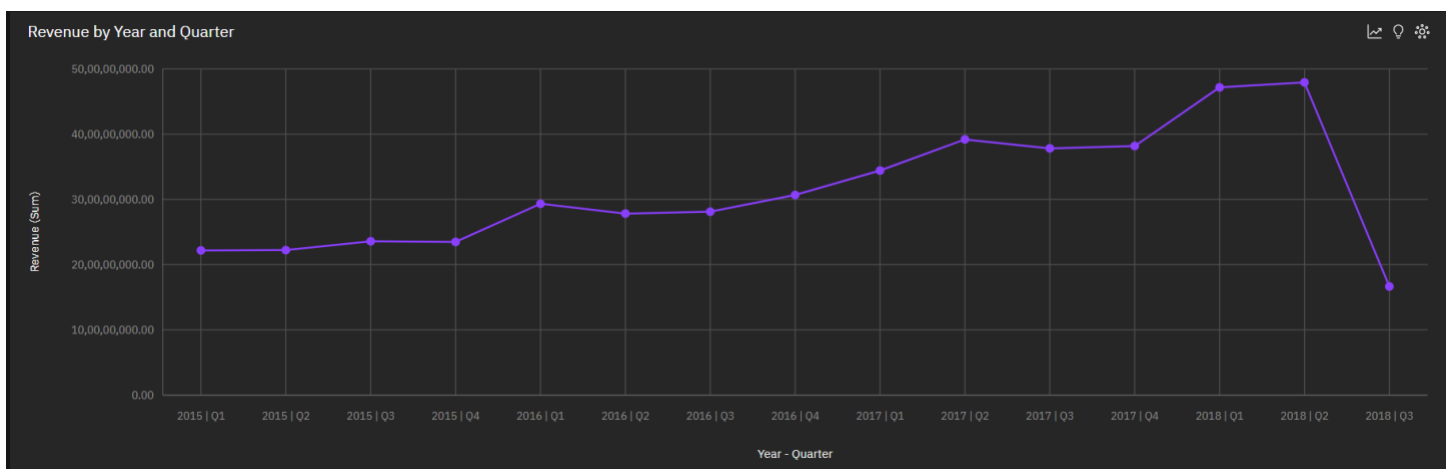
Then we will add our insight to the tab using the Text widget



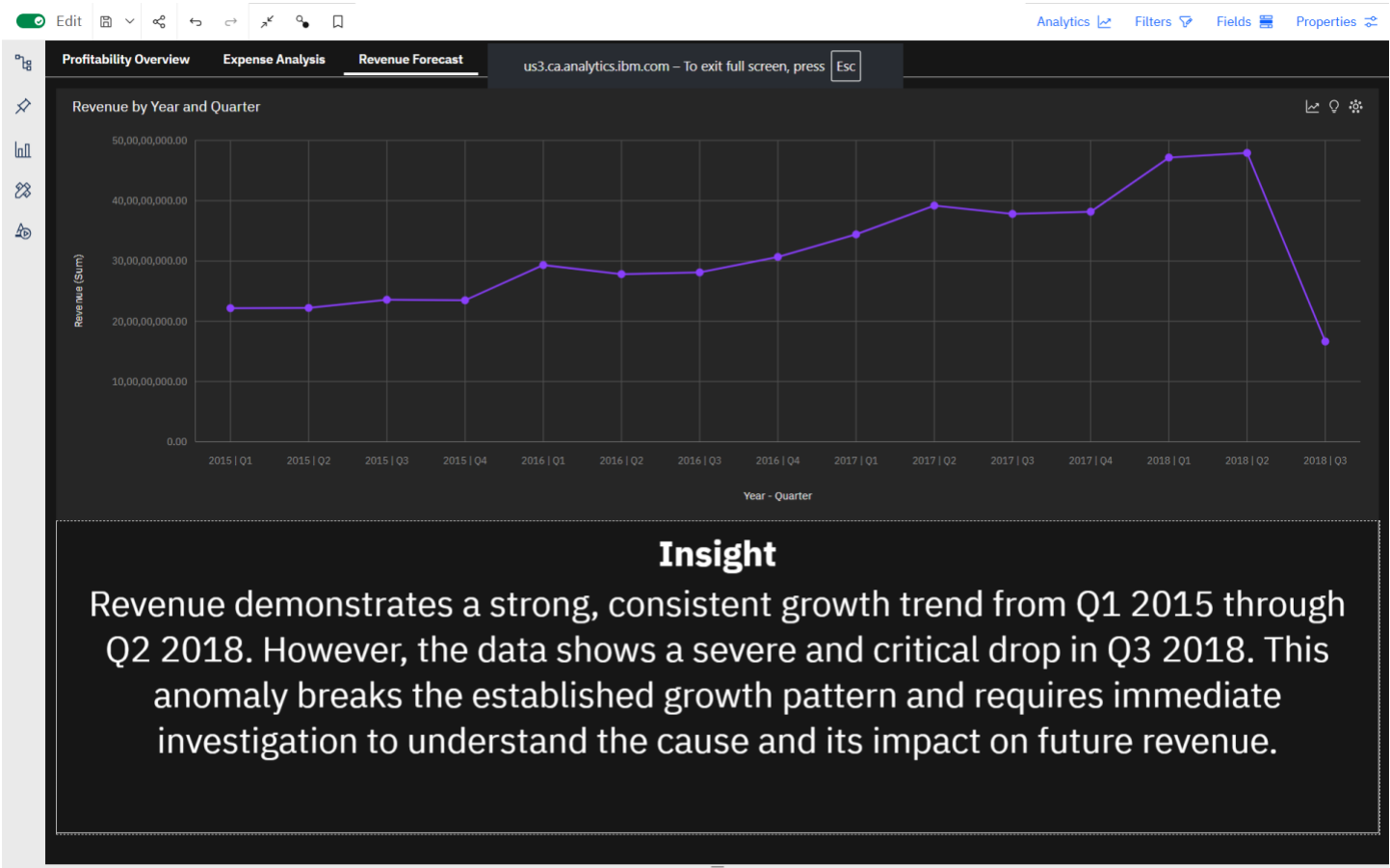


For our last tab, we will be work on Revenue Forecast

We will use a Line Chart for this



Now we will add our Insight



We can export our dashboard by following these steps



Click on this icon in top left corner

Share

×

Link

Export

**Export to PDF**

If you are using a Windows operating system, ensure that you installed a PDF driver. For more information about exporting to PDF, [click here](#).

Page size

Orientation

Letter

▼

Portrait

▼

☐ Include filters

Cancel

Export

Adjust the dimensions of the export file and click on export