

**Bicycle Sales Analytics Using  
IBM Cognos**

**A Project Report  
Data Analytics**

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**Link to Video:**

## **Introduction**

### **Overview**

Adventure Works is a sample database created for use in demos and training on each version of Microsoft SQL Server. The name Adventure Works refers to a fictitious large, multinational bicycle manufacturing company. "The company manufactures and sells metal and composite bicycles to North American, European and Asian commercial markets. While its base operation is located in Washington with 290 employees, several regional sales teams are located throughout their market base. In 2000, Adventure Works Cycles bought a small manufacturing plant, in Mexico. This manufactures several critical subcomponents for the Adventure Works Cycles product line. In 2001, they became the sole manufacturer and distributor of the touring bicycle product group. Coming off a successful fiscal year, Adventure Works Cycles is looking to broaden its market share by targeting their sales to their best customers, extending their product availability through an external Web site, and reducing their cost of sales through lower production costs."

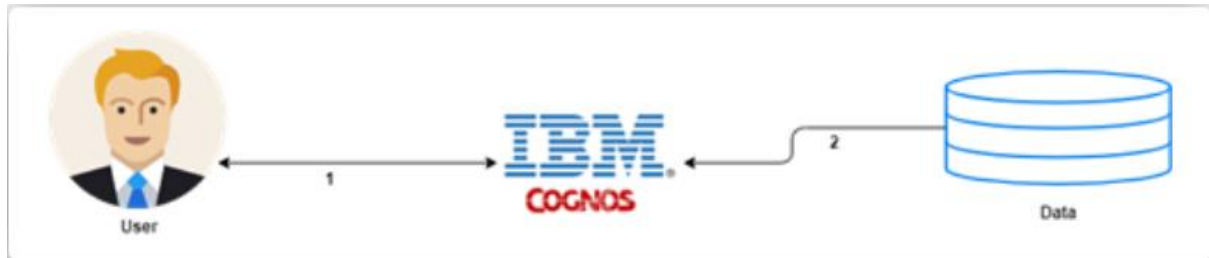
### **Goal**

Goal of this problem statement is to find and provide various Sales Analytics for the improvement of the Organization.

The main objective to do this project was to:

- Know Fundamental concepts and can work on Cognos Analytics
- Able to Analyze the given problem using Forecasting, Trend Lines
- Build Scatter and Density Plots, Correlation Matrix.
- Gain a broad understanding of plotting different graphs
- Able to create meaningful dashboards

## Architecture



I am using IBM cognos to work with the dataset of Adventure Works to visualize the feasible solutions and provide various Sales Analytics For the Improvement of the Organization.

## Project Flow:

### 1. Log in to IBM Account

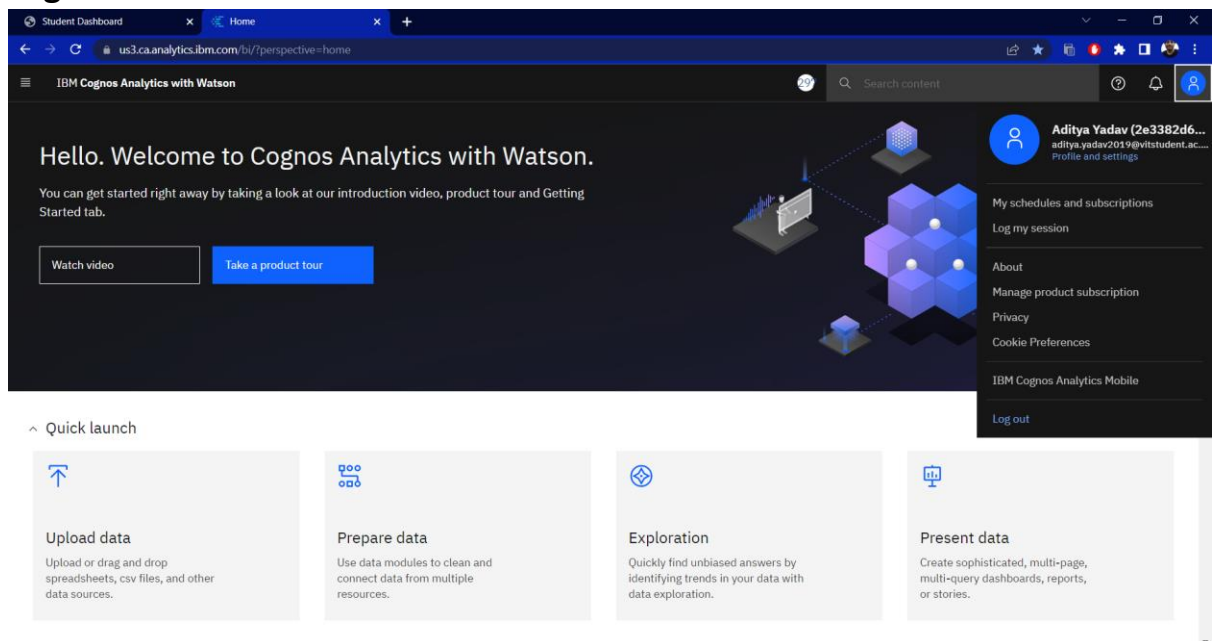


Fig: logging in to IBM account

## 2. Understanding the dataset

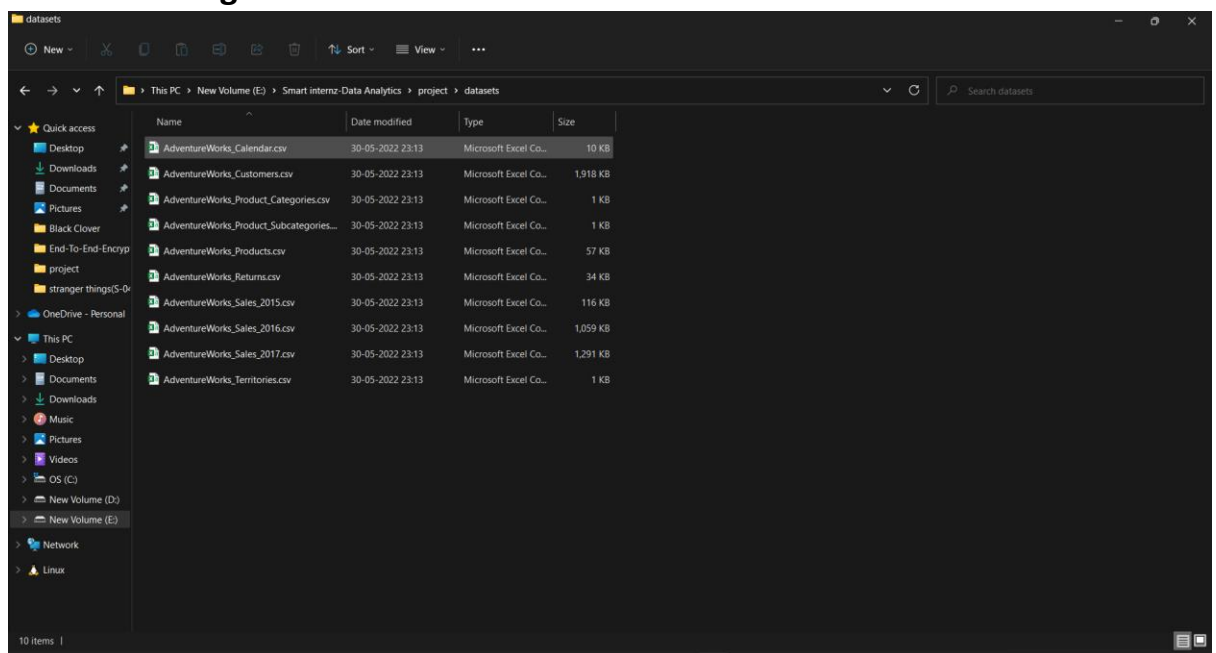


Fig: downloading and understanding the dataset

## 3. Loading Of Dataset

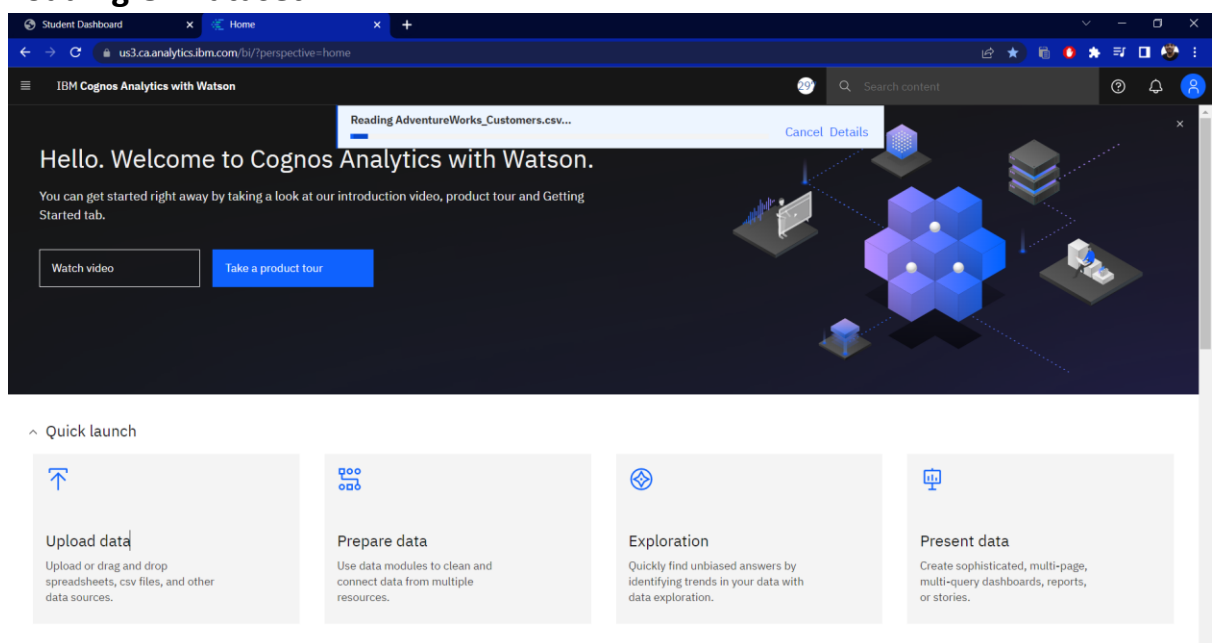


Fig: Uploading single dataset(adventureworks\_customers.csv)

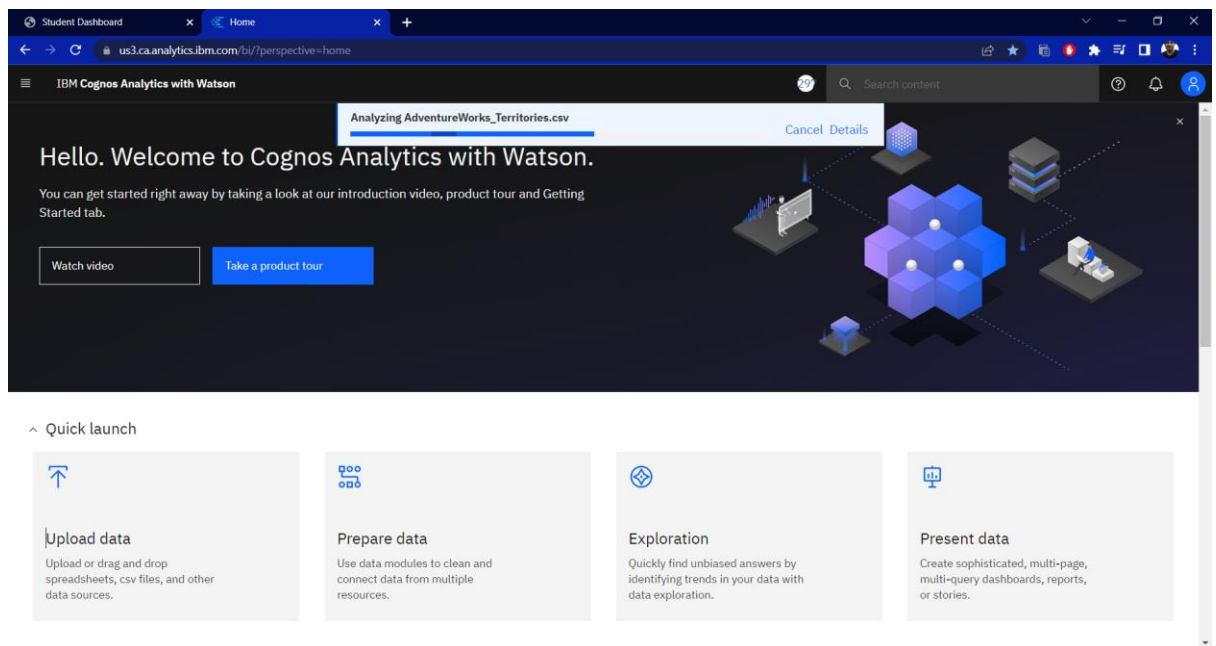


Fig: uploading multiple datasets

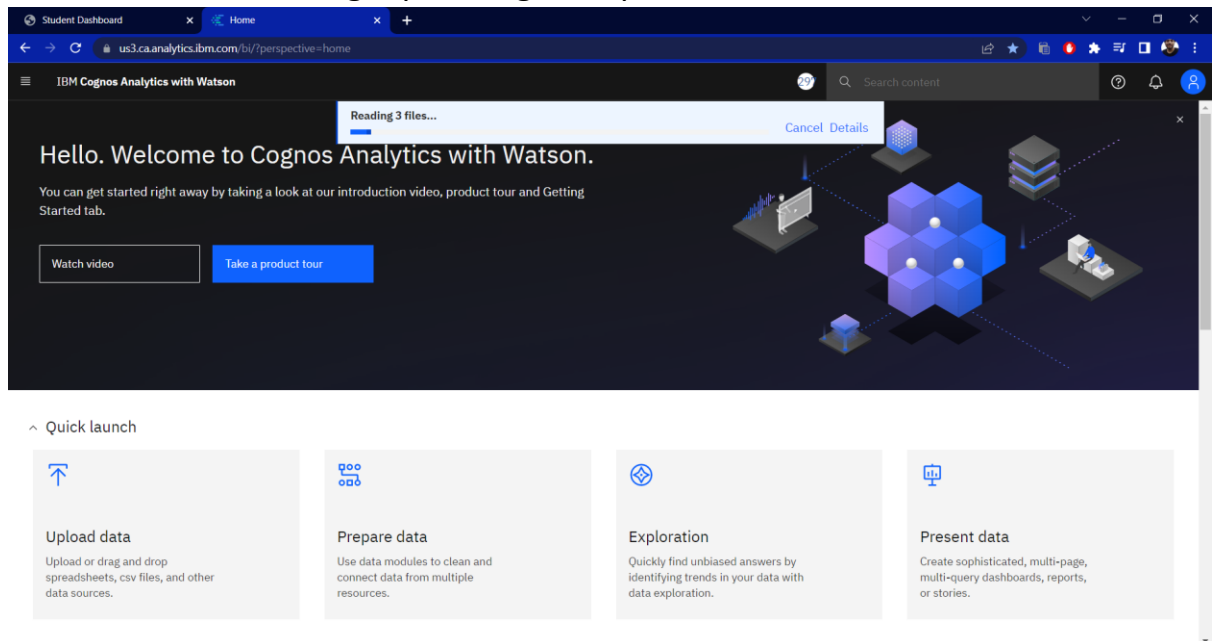


Fig: uploading sales dataset of 2015,2016,2017

## 4. Data Preparation – Union And Joins Of The Dataset

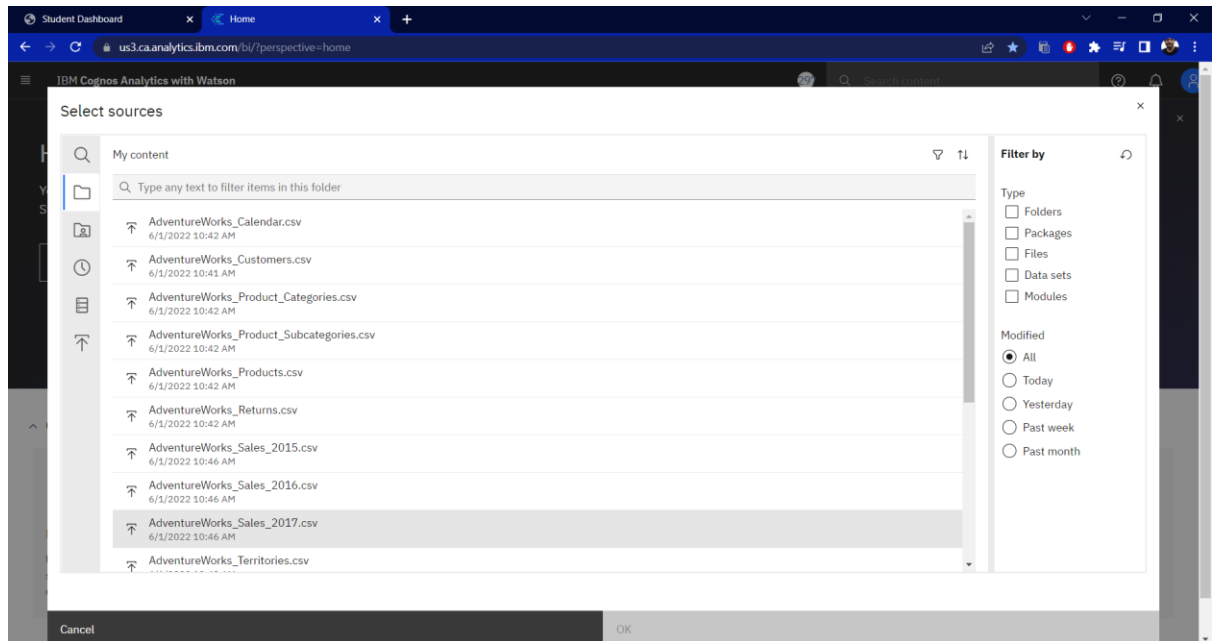


Fig: Preparation of data

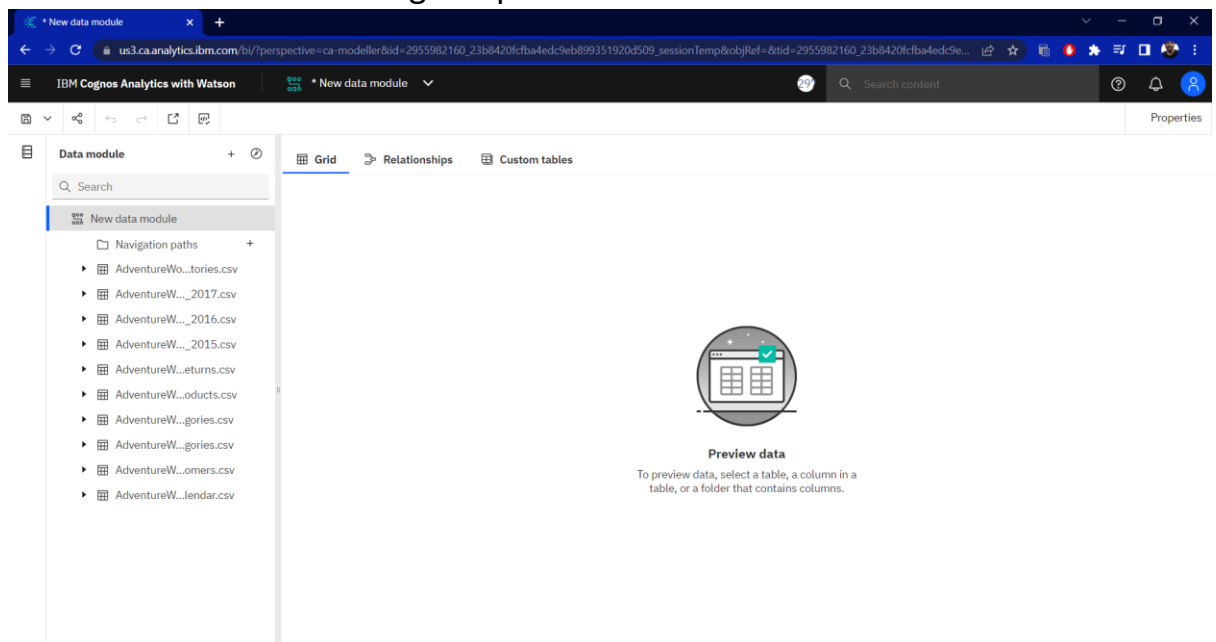


Fig: loading all dataset in the workbench

The screenshot shows the IBM Cognos Analytics interface. On the left, a sidebar titled 'Data module' contains a search bar and a list of CSV files: Navigation paths, Territories.csv, Sales\_2017.csv, Sales\_2016.csv, Sales\_2015.csv, Returns.csv, Products.csv, Product\_Subcategories.csv, Product\_Categories.csv, Customers.csv, and Calendar.csv. The 'Calendar.csv' file is highlighted. The main area displays a grid view of the data, showing a table with two columns: 'Row Id' and 'Date'. The table contains 14 rows of data, with dates ranging from 1/1/2015 to 1/14/2015.

Row Id	Date
1	1/1/2015
2	1/2/2015
3	1/3/2015
4	1/4/2015
5	1/5/2015
6	1/6/2015
7	1/7/2015
8	1/8/2015
9	1/9/2015
10	1/10/2015
11	1/11/2015
12	1/12/2015
13	1/13/2015
14	1/14/2015

Fig: preparation of data by renaming all the datasets.

The screenshot shows the 'Save as' dialog box in IBM Cognos Analytics. The 'Name' field is set to 'AdW\_DataPrep.csv'. The 'Selected destination' is 'My content'. The 'My content' section shows a list of files with columns 'Name', 'Type', and 'Last Accessed'. The files listed are AdventureWorks\_Calendar.csv, AdventureWorks\_Customers.csv, AdventureWorks\_Product\_Categories.csv, and AdventureWorks\_Product\_Subcategories.csv, all of which are CSV files uploaded on 01/06/2022.

Name	Type	Last Accessed
AdventureWorks_Calendar.csv	CSV	Uploaded file 01/06/2022, 10:42
AdventureWorks_Customers.csv	CSV	Uploaded file 01/06/2022, 10:41
AdventureWorks_Product_Categories.csv	CSV	Uploaded file 01/06/2022, 10:42
AdventureWorks_Product_Subcategories.csv	CSV	Uploaded file 01/06/2022, 10:42
AdventureWorks_Products.csv	CSV	Uploaded file 01/06/2022, 10:42

Fig: Saving the module after performing data preparation

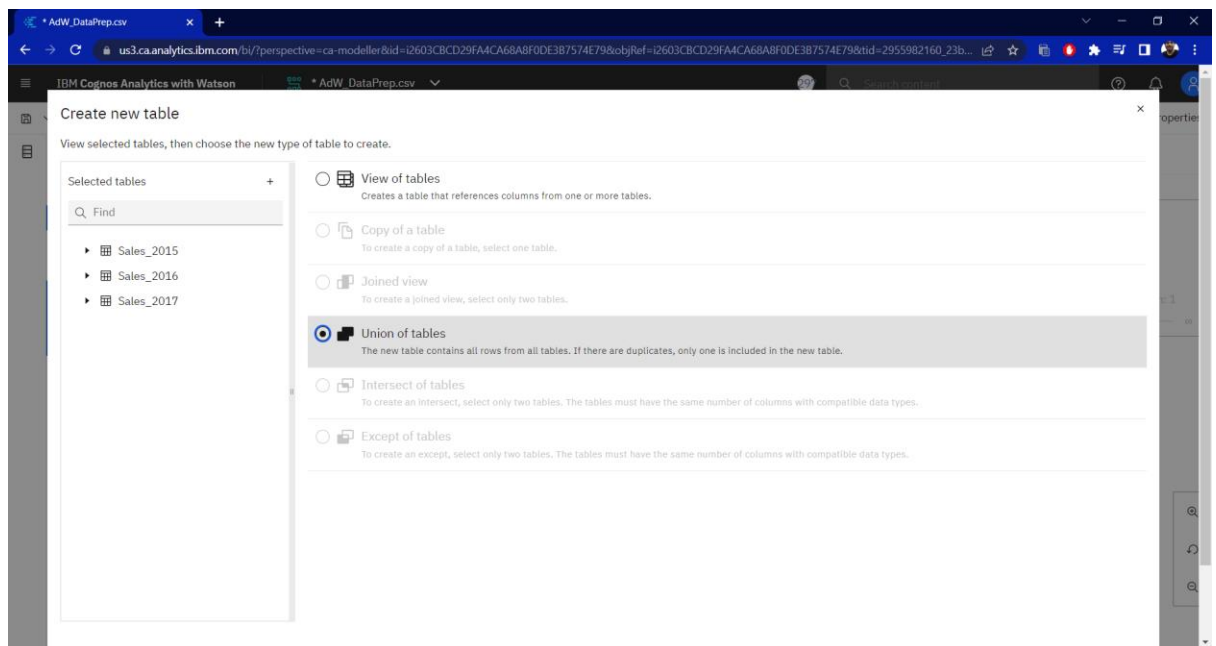


Fig: Create union of sales datasets

The screenshot shows the 'Create a union of tables' dialog. The 'New table name' is 'Sales\_Data'. On the left, under 'Select items', a list of columns is shown with checkboxes indicating they are selected for the union. The main table displays the resulting union of data from the selected tables.

Row Id	OrderDate	StockDate	OrderNumber	ProductKey	CustomerKey	Te
3	1/1/2015	10/29/2001	SO45082	350	11455	
5	1/2/2015	12/15/2001	SO45083	312	14947	
7	1/2/2015	12/18/2001	SO45086	314	18747	
8	1/2/2015	10/9/2001	SO45085	312	18746	
10	1/3/2015	9/29/2001	SO45090	310	29170	
12	1/3/2015	10/24/2001	SO45092	313	18899	
19	1/4/2015	9/15/2001	SO45098	310	29167	
20	1/4/2015	12/7/2001	SO45095	344	11394	
24	1/5/2015	11/24/2001	SO45102	310	29274	
25	1/6/2015	10/17/2001	SO45104	310	29142	
28	1/6/2015	9/24/2001	SO45103	310	29140	
33	1/7/2015	11/9/2001	SO45111	326	25713	

Fig: After performing union dataset on sales datasets



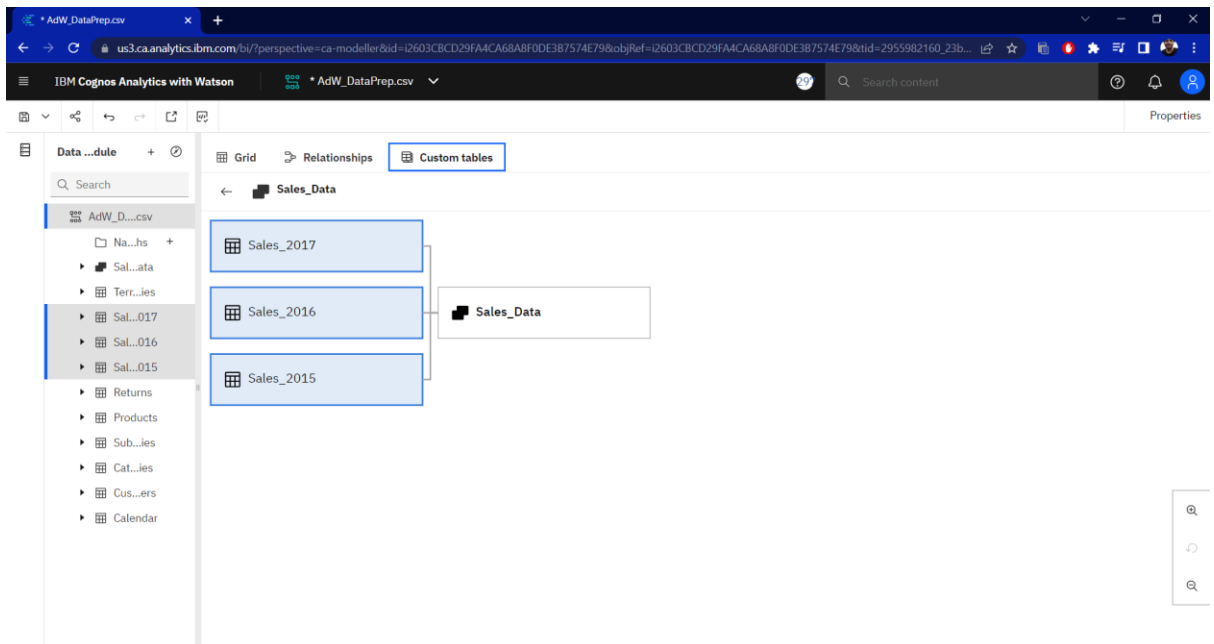


Fig: Union of sales dataset

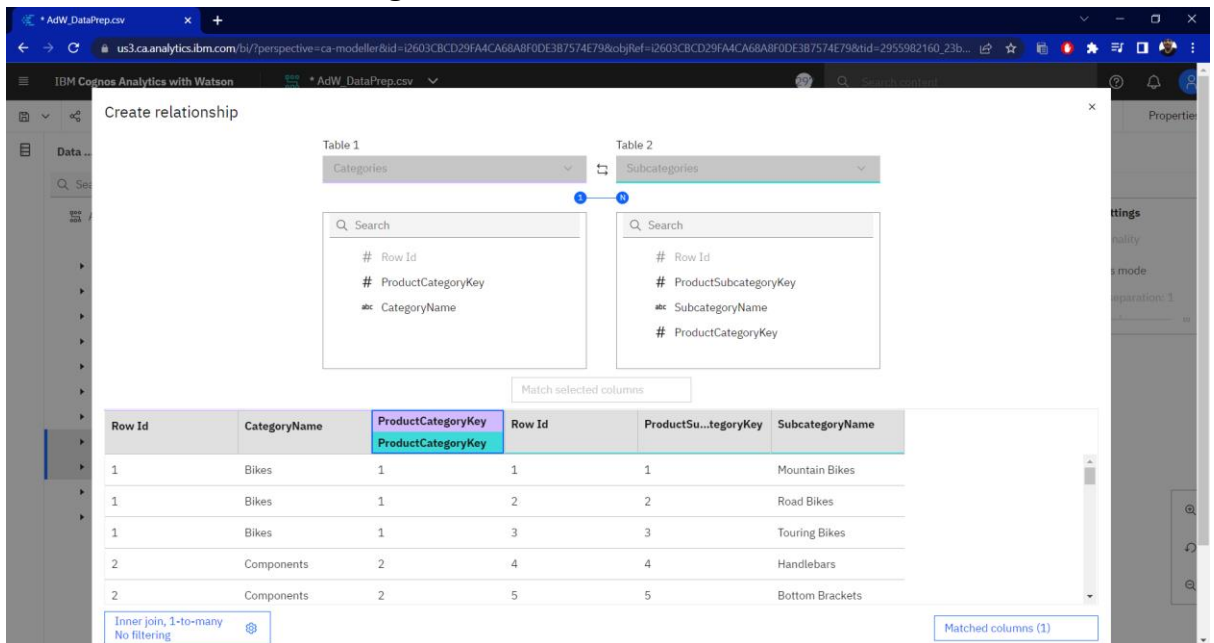


Fig: create relationship between categories and sub-categories and do a join operation.

**Create relationship**

Table 1: Subcategories

- # Row Id
- # ProductSubcategoryKey
- SubcategoryName
- # ProductCategoryKey

Table 2: Products

- # Row Id
- # ProductKey
- # ProductSubcategoryKey
- ProductSKU
- ProductName

Match selected columns

Row Id	SubcategoryName	ProductCategoryKey	ProductSubcategoryKey	Row Id	ProductKey	ProductSKU	ProductName
31	Helmets	4	31	1	214	HL-U509-R	Sport-1
31	Helmets	4	31	2	215	HL-U509	Sport-1 Black
22	Socks	2	22	3	219	SO_B090-L	Mount

Inner join, 1-to-many  
No filtering

Matched columns (1)

Fig: again, create relationship between subcategories and products and do join operation.

**Create relationship**

Table 1: Products

- # Row Id
- # ProductKey
- # ProductSubcategoryKey
- ProductSKU
- ProductName

Table 2: Sales\_Data

- # Row Id
- OrderDate
- StockDate
- OrderNumber
- # ProductKey

Match selected columns

ProductDescription	ProductColor	ProductSize	ProductStyle	ProductCost	ProductPrice	ProductKey
Top-of-the-line competition mountain bike. Performance-enhancing options include the innovative HL Frame, super-smooth front suspension, and traction for all terrain	Black	44	U	1898.0944	3374.99	350

Inner join, 1-to-many  
No filtering

Matched columns (1)

Fig: create relationship between products and sales\_data and do join operation.

**Create relationship**

Table 1: Products

- # Row Id
- # ProductKey
- # ProductSubcategoryKey
- ProductSKU
- ProductName

Table 2: Returns

- # Row Id
- ReturnDate
- TerritoryKey
- ProductKey

Match selected columns

ProductDescription	ProductColor	ProductSize	ProductStyle	ProductCost	ProductPrice	ProductKey	ProductKey
This bike is ridden by race winners. Developed with the Adventure Works Cycles professional race team, it has a extremely light heat-treated aluminum frame and steering	Red	48	U	2171.2942	3578.27	312	

Inner join, 1-to-many  
No filtering

Matched columns (1)

Fig: create relationship between products and returns and do join operations

**Create relationship**

Table 1: Customers

- # Row Id
- # CustomerKey
- Prefix
- FirstName
- LastName

Table 2: Sales\_Data

- StockDate
- OrderNumber
- ProductKey
- CustomerKey
- TerritoryKey

Match selected columns

EmailAddress	AnnualIncome	TotalChildren	EducationLevel	Occupation	HomeOwner	CustomerKey	CustomerKey
ross38@adventure-works.com	\$100,000	0	High School	Management	Y	11455	
alejandro4@adventure-works.com	\$20,000	2	High School	Manual	Y	14947	
jacquelyn3@adventure-works.com	\$70,000	2	Partial College	Skilled Manual	N	18747	
reginald12@adventure-works.com	\$70,000	1	Partial College	Skilled Manual	N	18746	

Inner join, 1-to-many  
No filtering

Matched columns (1)

Fig: join operation between customers and sales\_data

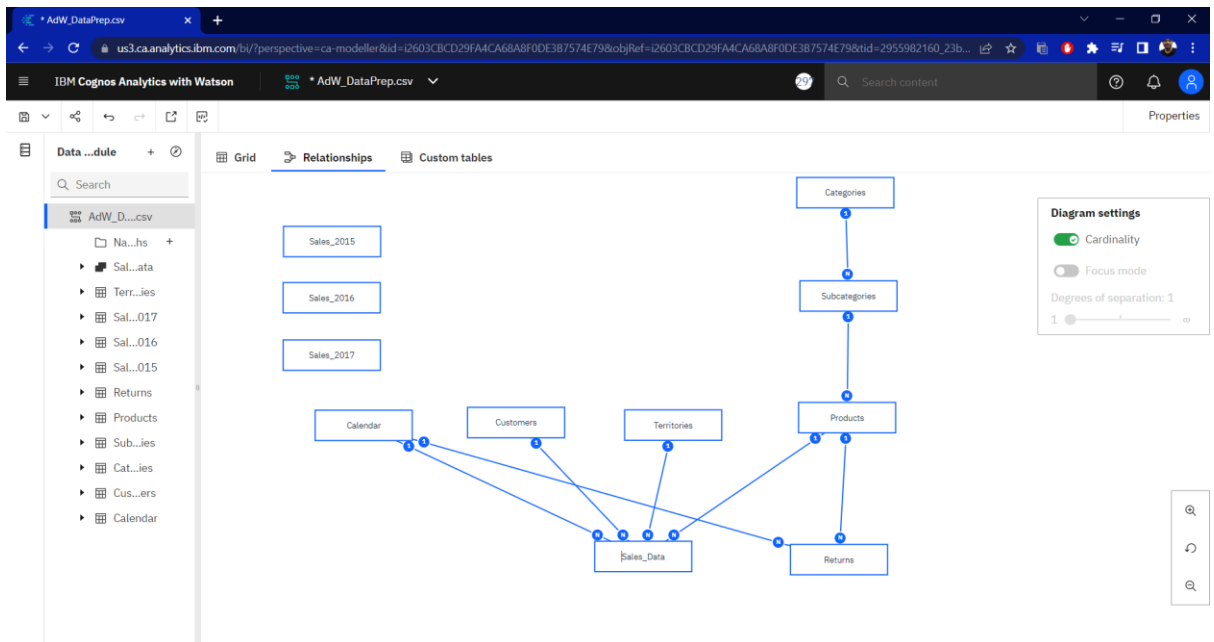


Fig: Relationship established after performing union and join operation

## 5. Data Preparations-Calculations

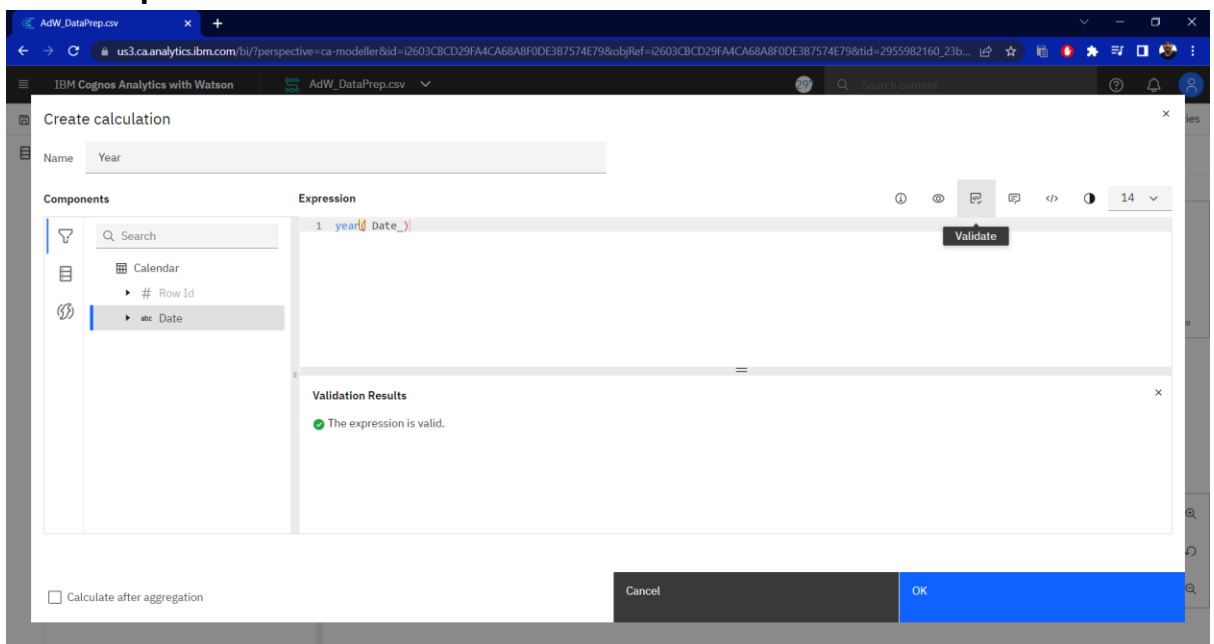


Fig: Performing Year calculation on calendar

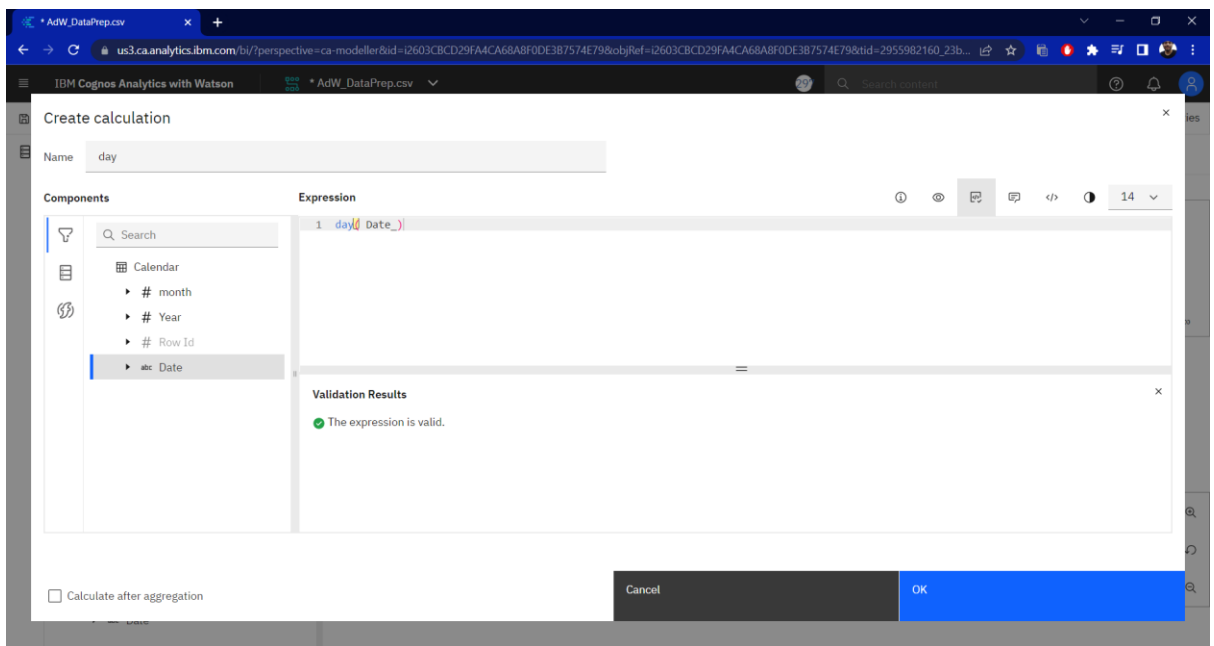


Fig: create calculation for month and date of calendar

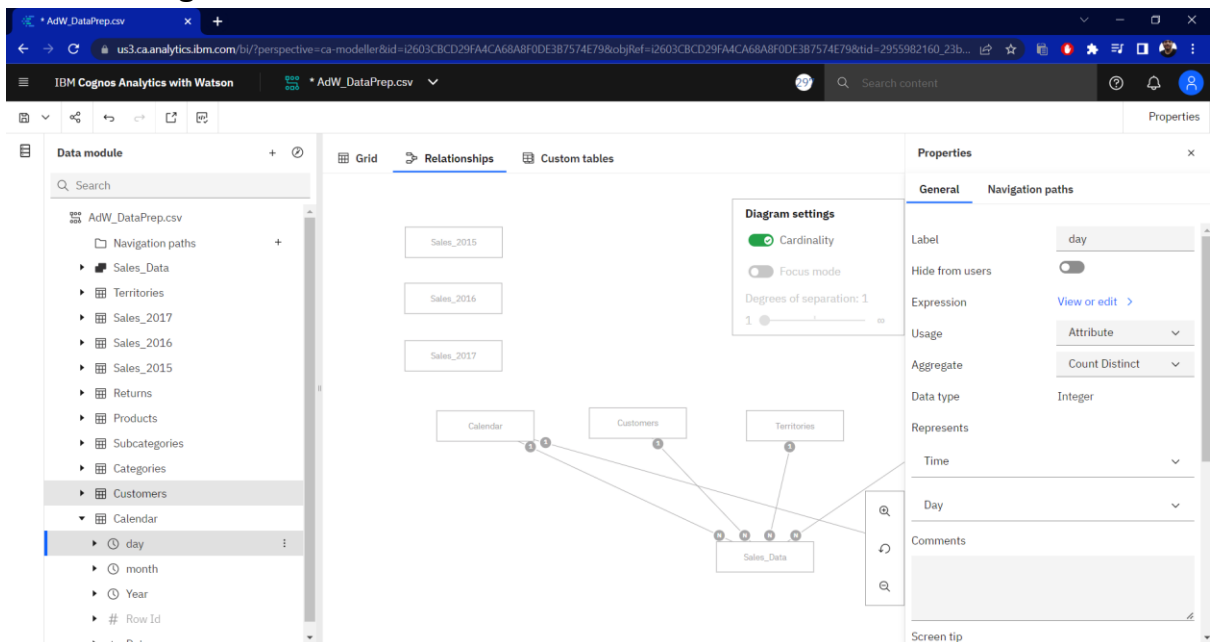


Fig: format the calculated data and update the properties

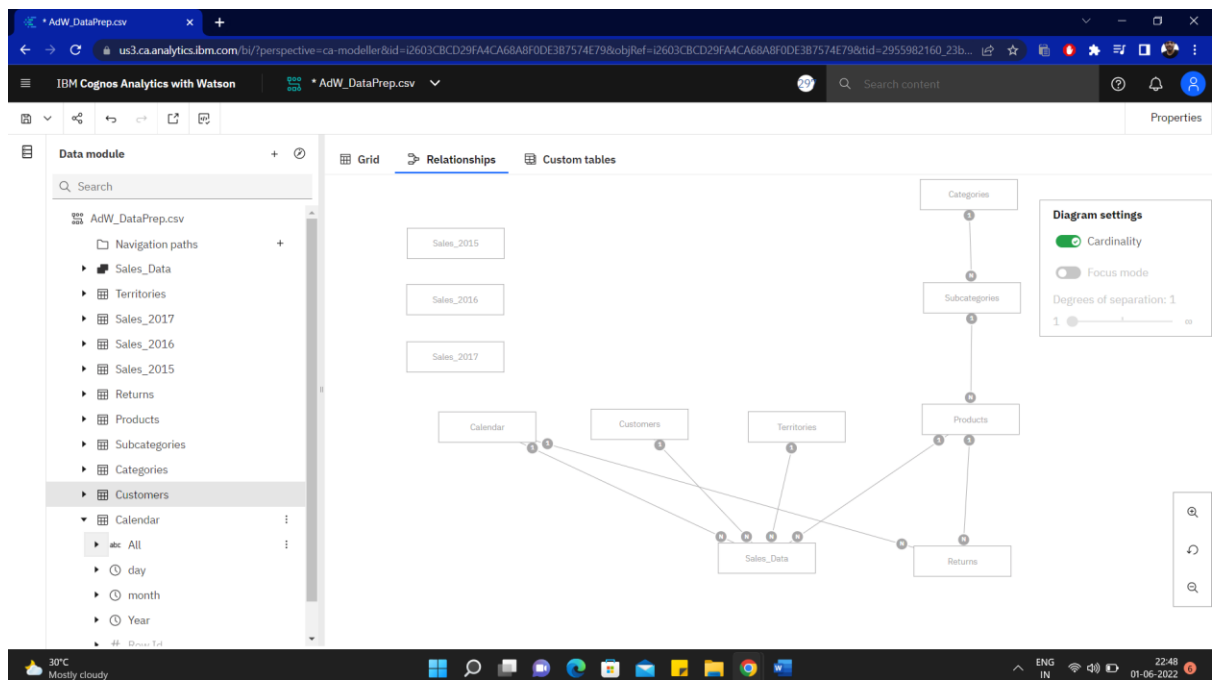


Fig: create calculation for all

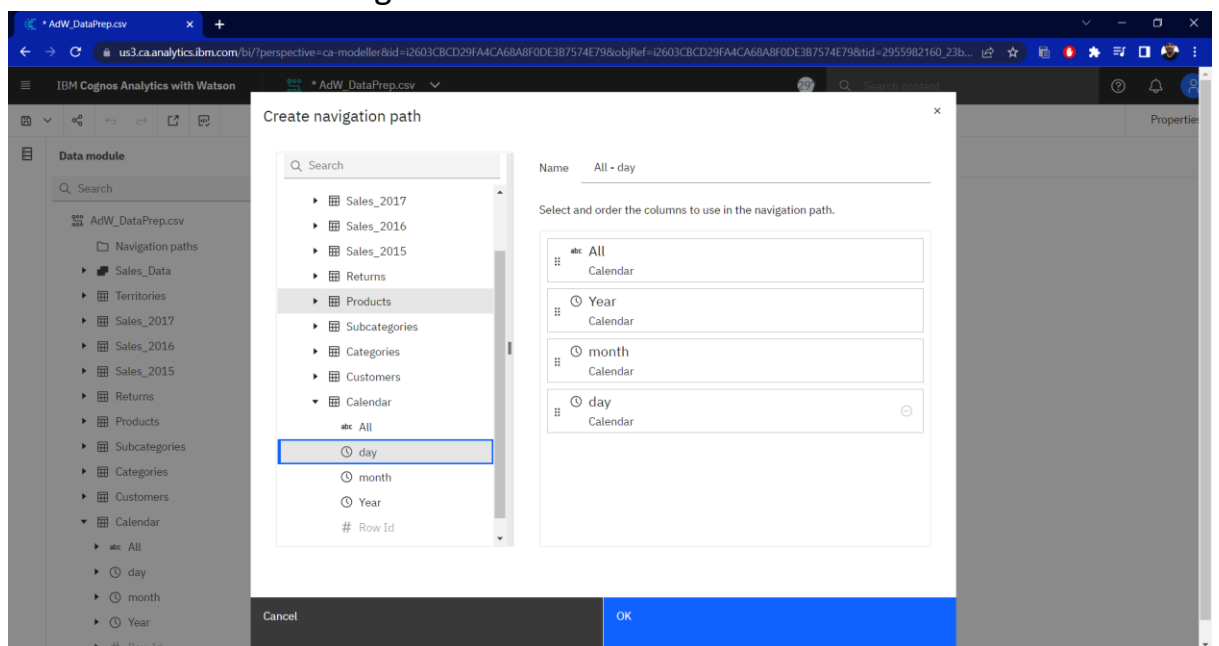


Fig: create navigation path for calendar data

## 6. Product wise Order Quantity, Return Quantity and Return Rate

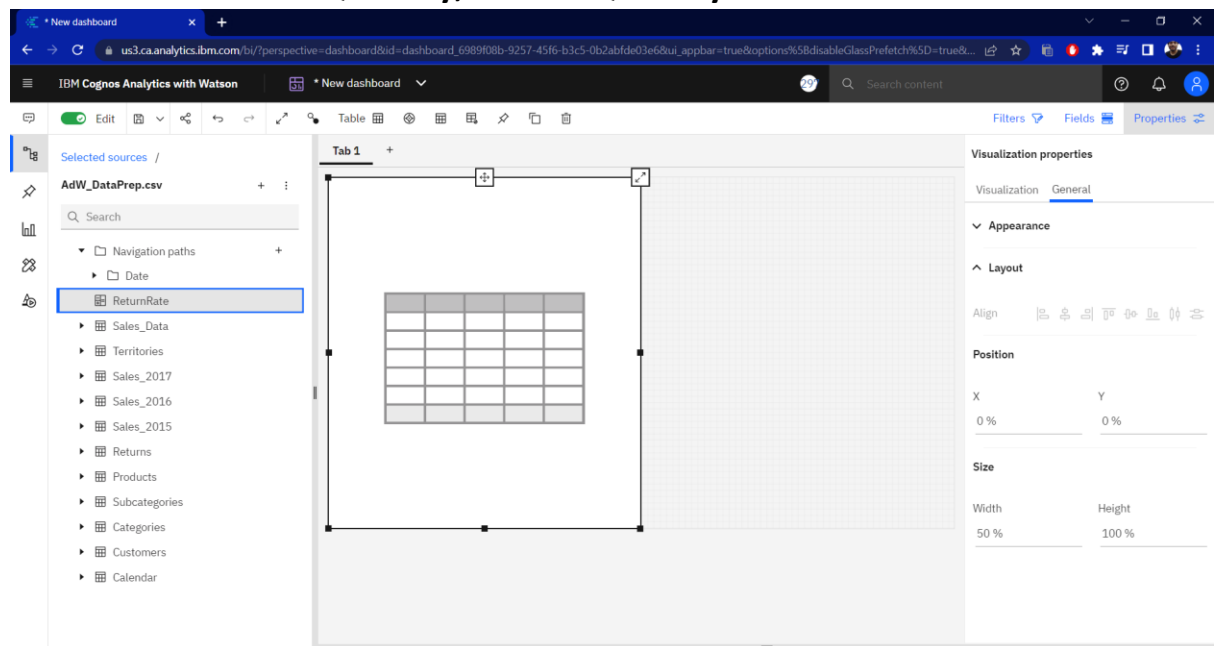


Fig: select a table visualization

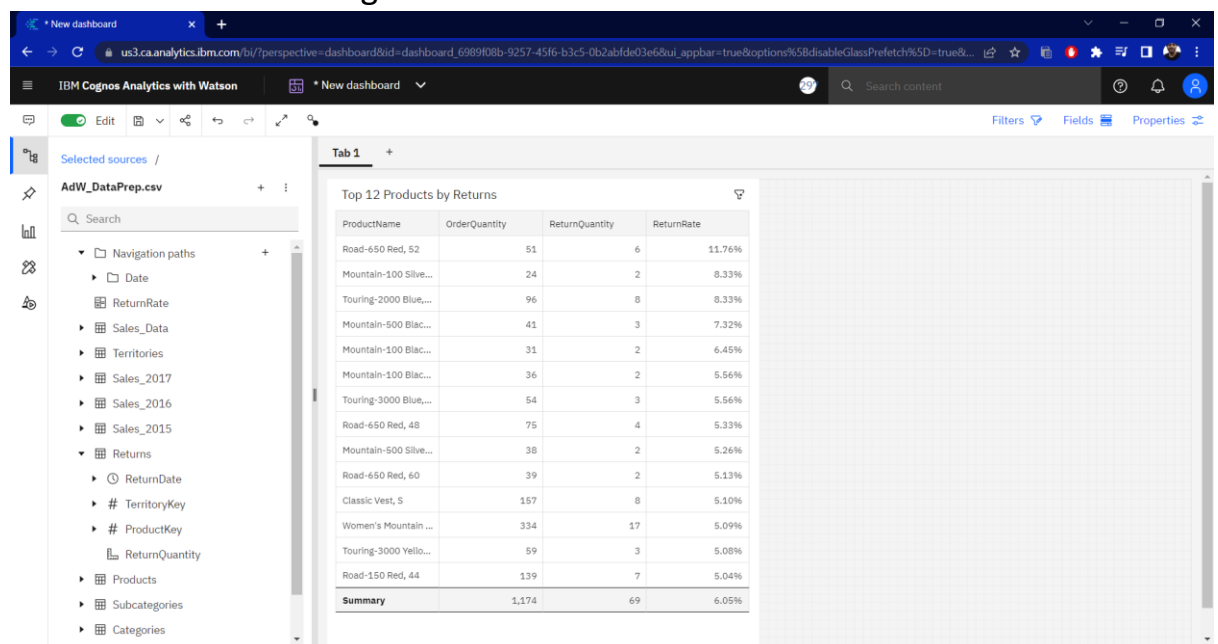


Fig: Top 12 products by  
Returns(productName,OrderQuantity,ReturnQuantity,ReturnRate)

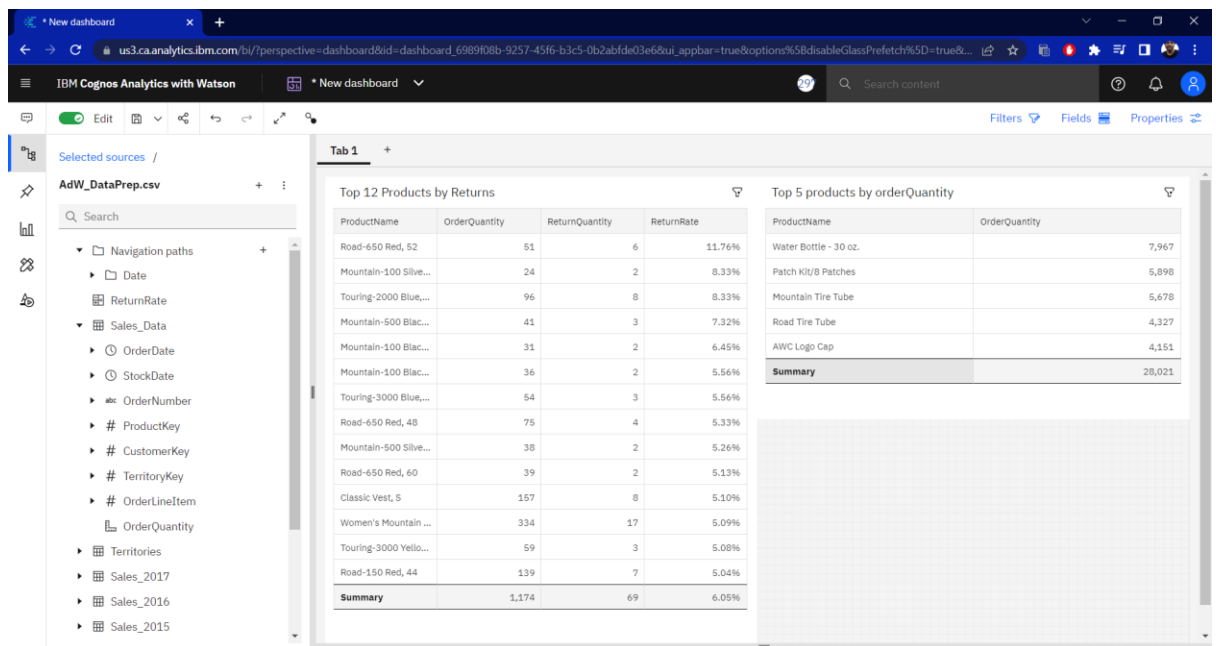


Fig: Top 5 product by OrderQuantity

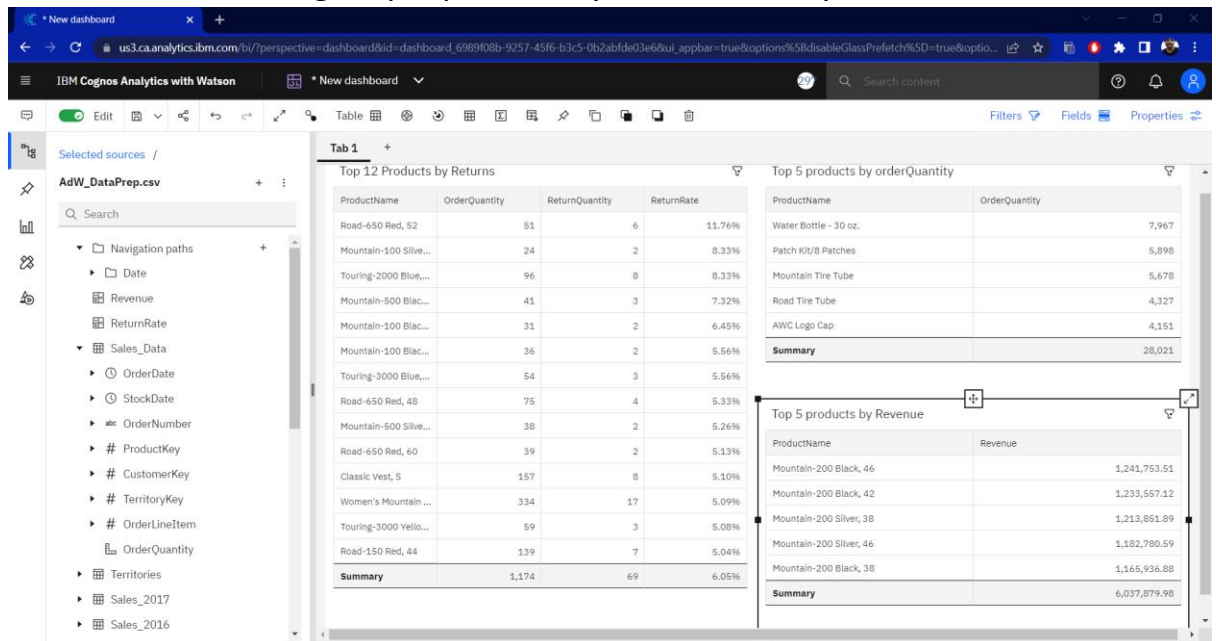


Fig: Top 5 products by revenue



## 7. Showing the Revenue by Education Level with Tree Map

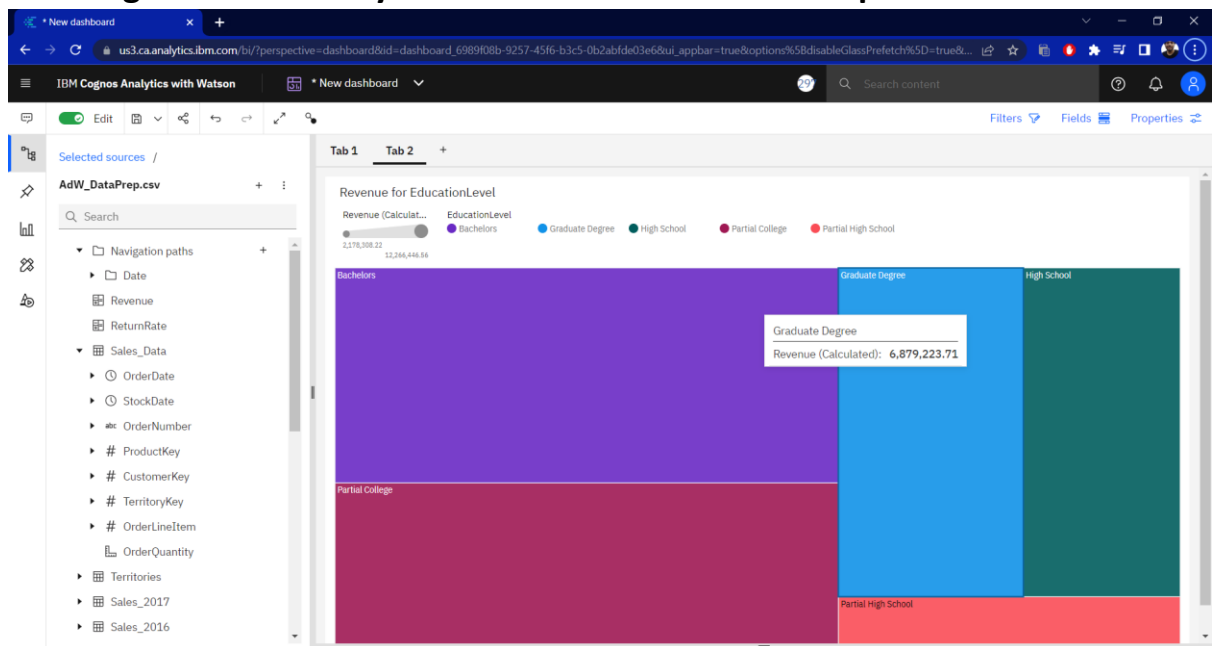


Fig: Revenue for EducationLevel

## 8. Country Wise Sales using Geographical map.

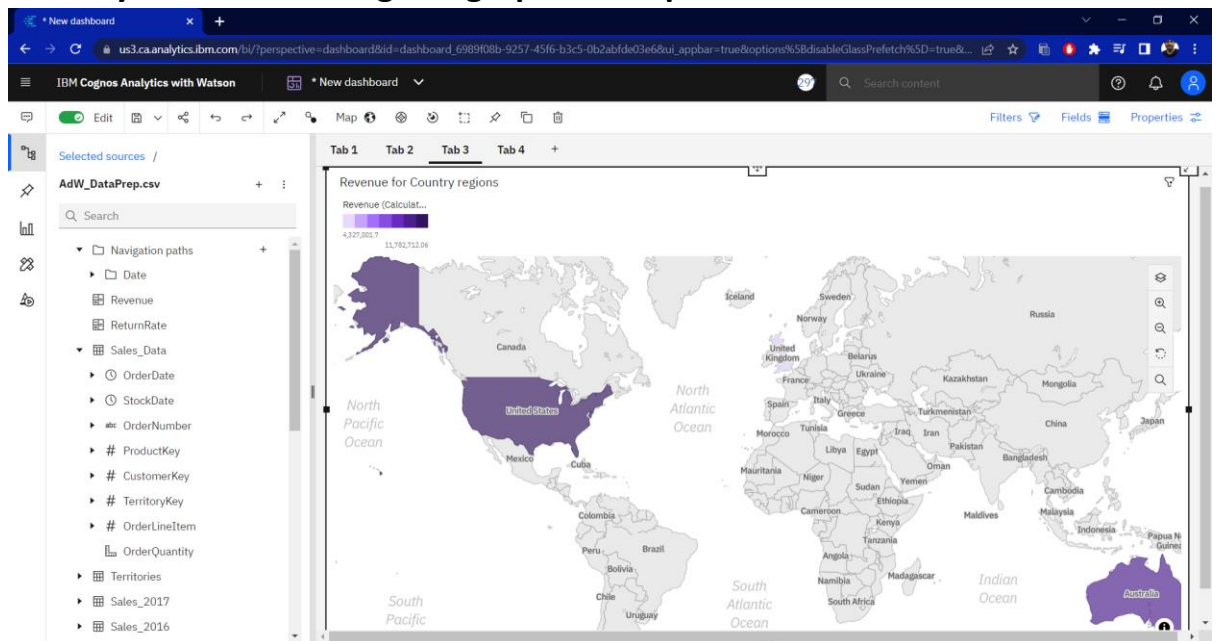


Fig: Revenue for Country Regions

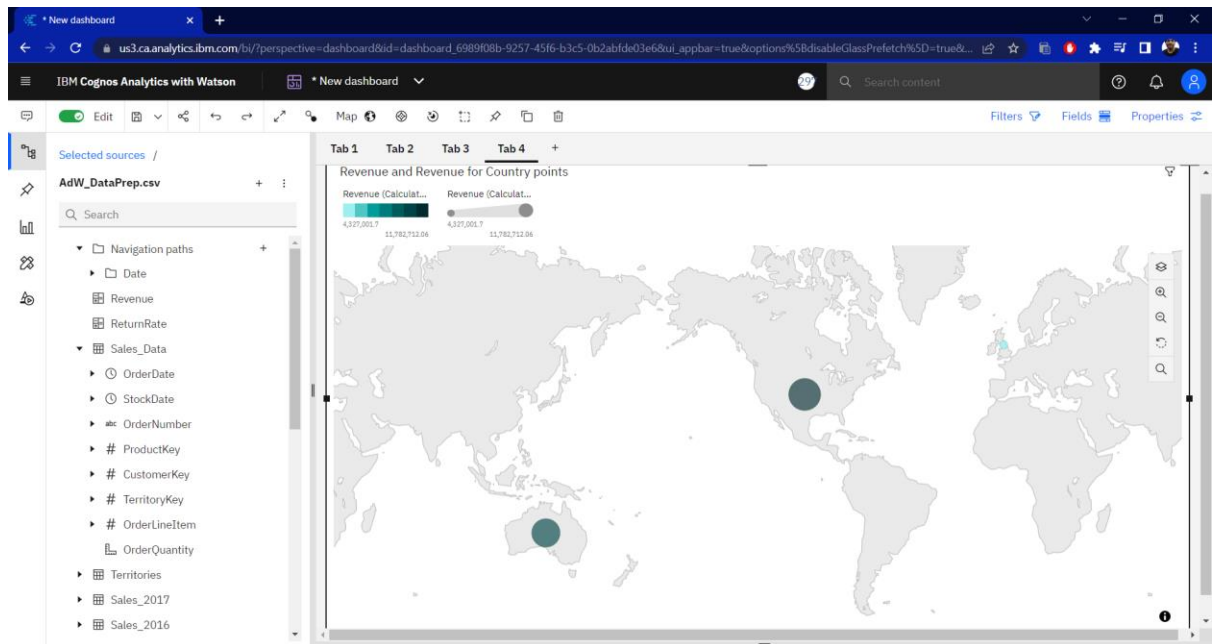


Fig: Revenue and Revenue for Country Points

## 9. Revenue by month using Pie Chart

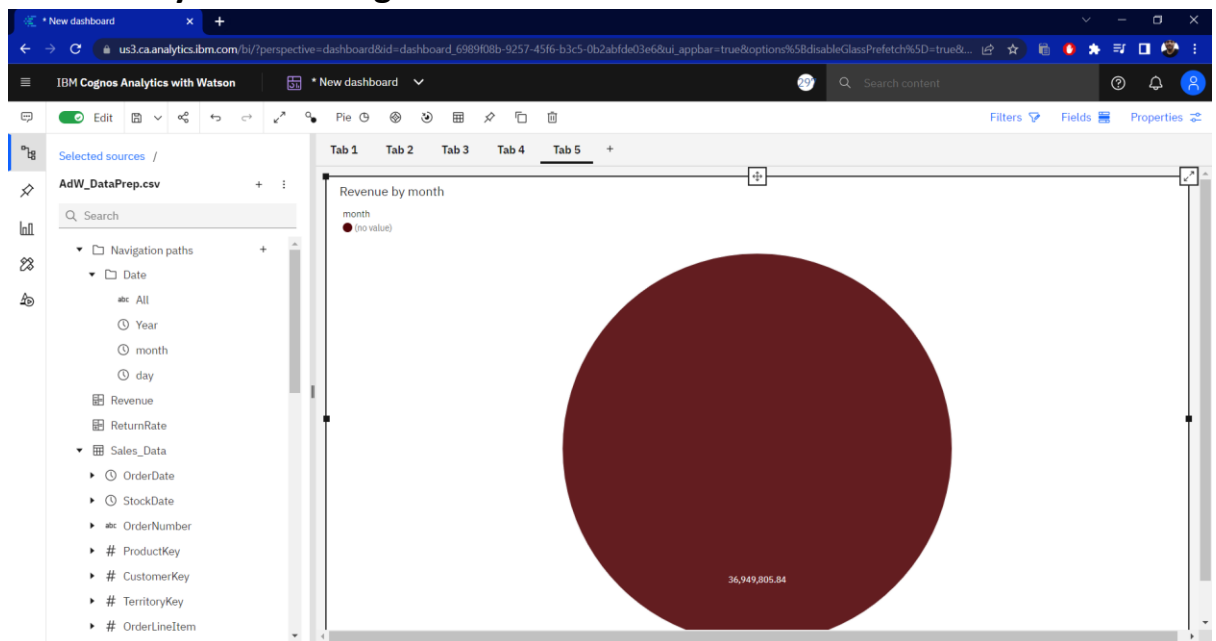


Fig: revenue by month

## 10. Summary of Revenue, Orders and Returns.

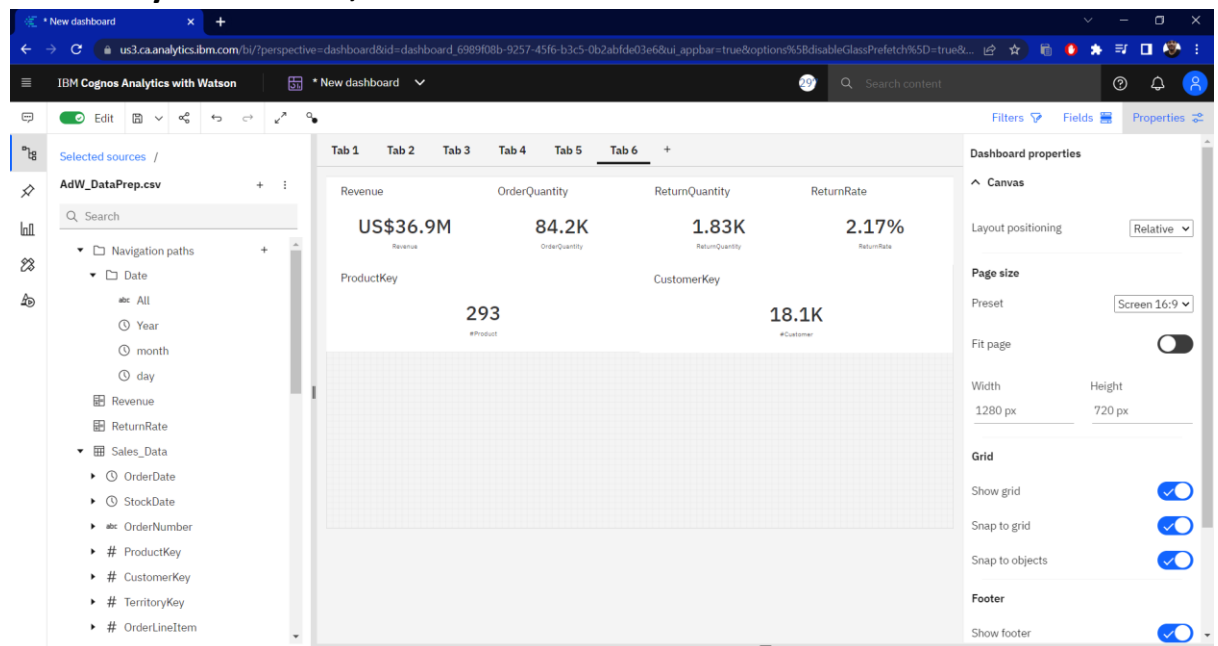


Fig: summary of Revenue order and returns

## 11. Monthly Forecast of Revenue

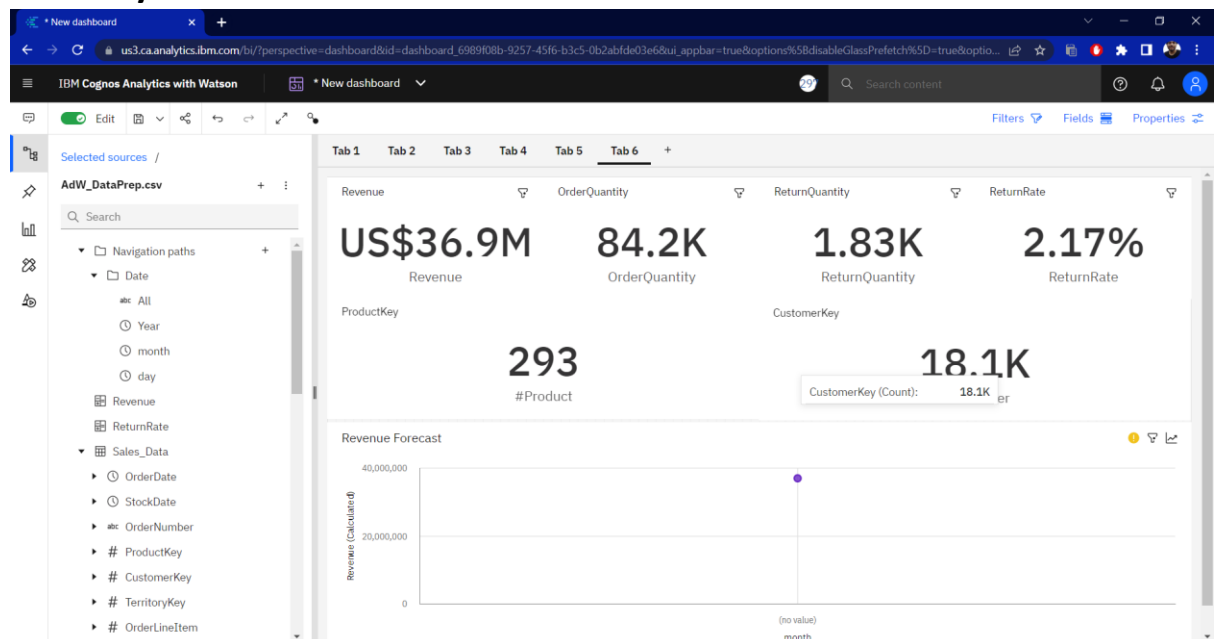


Fig: Revenue Forecast

## **Advantage and Disadvantage of creating Dashboard**

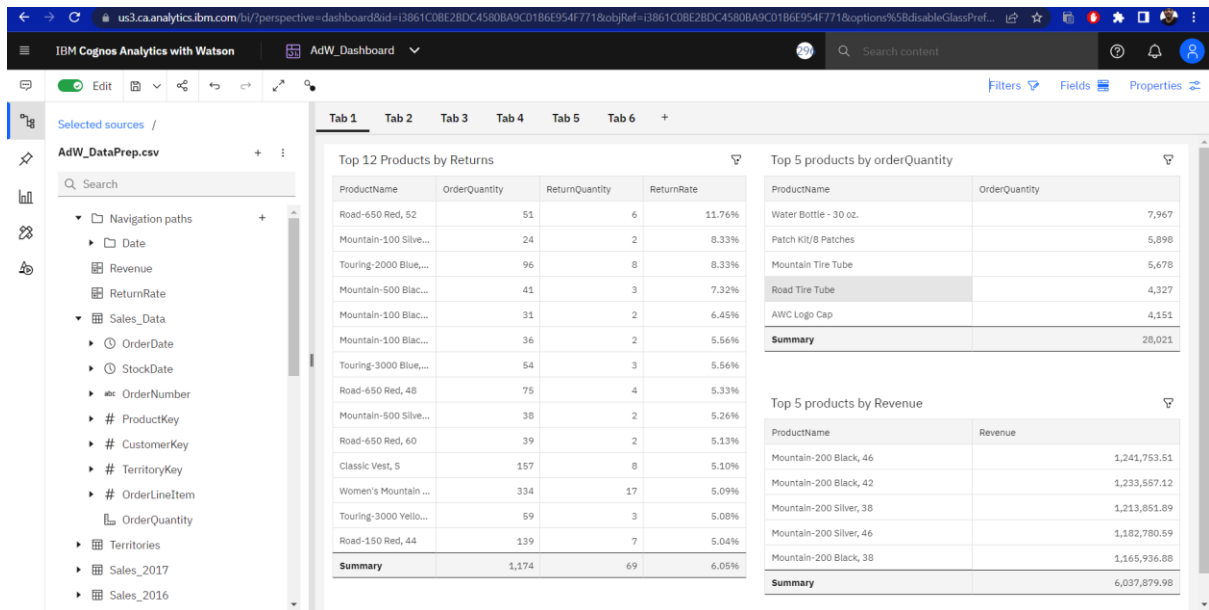
### **Advantage:**

- Enhanced Visibility: Dashboards provide greater visibility with information available whenever it is required to ensure businesses are better placed to respond to changing market conditions.
- Timesaving Efficiency: With dashboards, we are no longer wasting valuable time generating reports from multiple systems. Instead, data is drawn from a source and displayed as an easy to interpret visual overview.
- Better Forecasting: With greater insight into the data, future demand can be more accurately predicted using historic information. Businesses can be more effectively planned for demand fluctuations, setting measurable goals and deliverables for greater success.
- Better Decision Making: Whether you're providing reporting and analysis for the entire organization or functional areas of the business, a dashboard allows companies to analyse key data quickly and meticulously. Visualized interactivity serves to deliver overwhelming amounts of data in a way that is easy to understand. With the ability to easily identify what the data really means; better decisions can be made relevant to the business.

### **Disadvantage:**

- Flashy or cluttered design, with users attempting to incorporate too much information without understanding constraints or considering their specific needs from the range of different measurables detailed data analysis provides.
- The technology used in the development of dashboards differs from other software solutions already employed in organizations and can be initially difficult to understand.
- The business has no predetermined rules and hierarchies for how dashboard metrics are used. This means each employee can use the metrics in different ways, resulting in a diverse set of data being reported.

# Dashboard



## Conclusion

This way, with the help of diagrams, graphs, and maps we can understand given data. This understanding of data allows us to ask the right questions to reach our desired goals by optimizing methods. With this project, we learned how to upload and prepare data. We also statistical concepts which helped in calculations and plotting of graphs and maps to make a dashboard.