

Different Methods for Creating Dashboard Visualizations with Cognos Analytics

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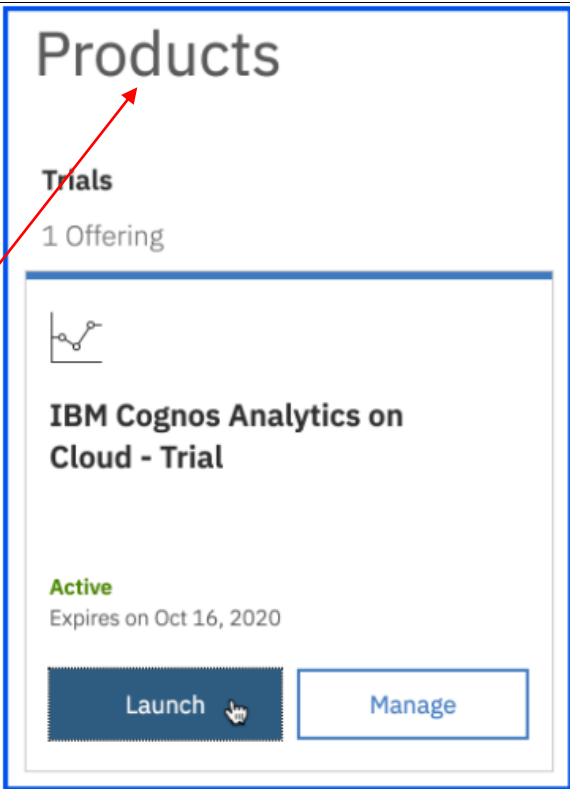
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After completing this lab, you will be able to:

- 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.

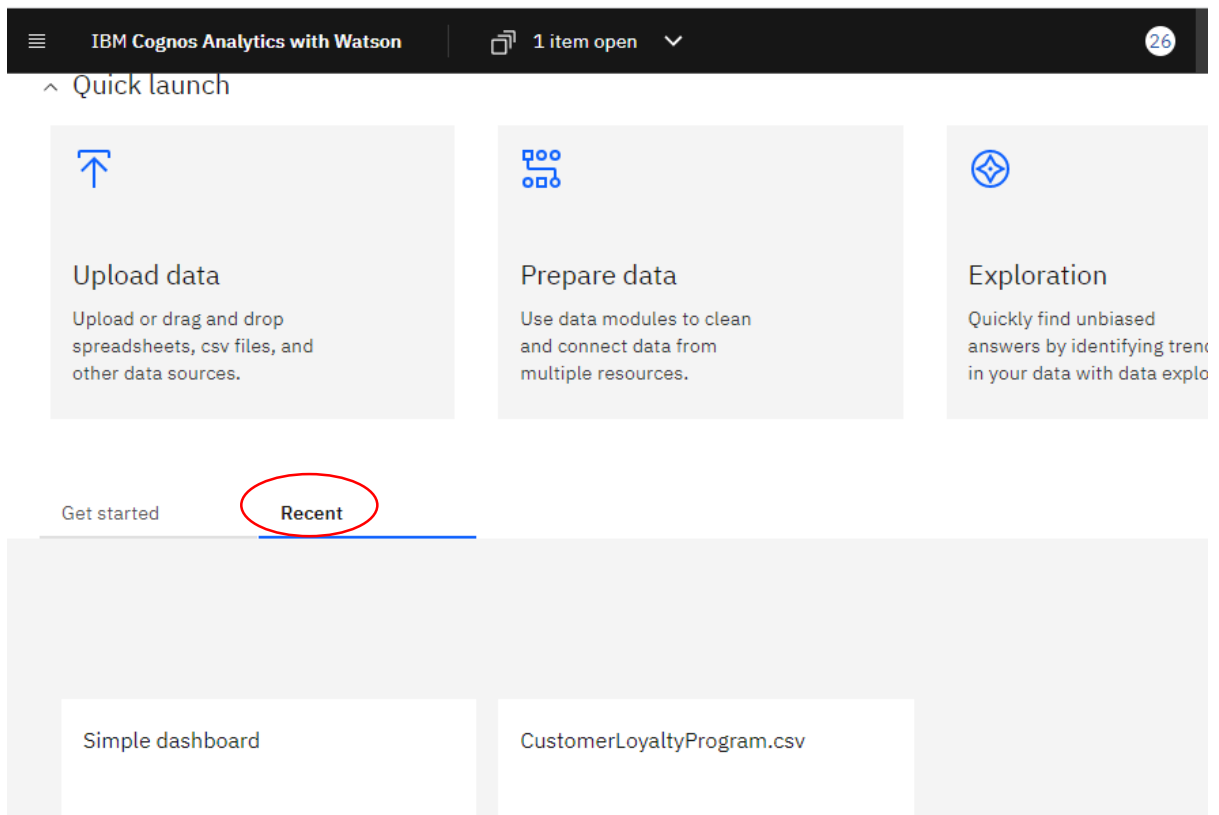
Exercise 1: Work with Tabs and Start a New Dashboard within Tabs

In this exercise, you will learn how to work with tabs and start a new dashboard within tabs.

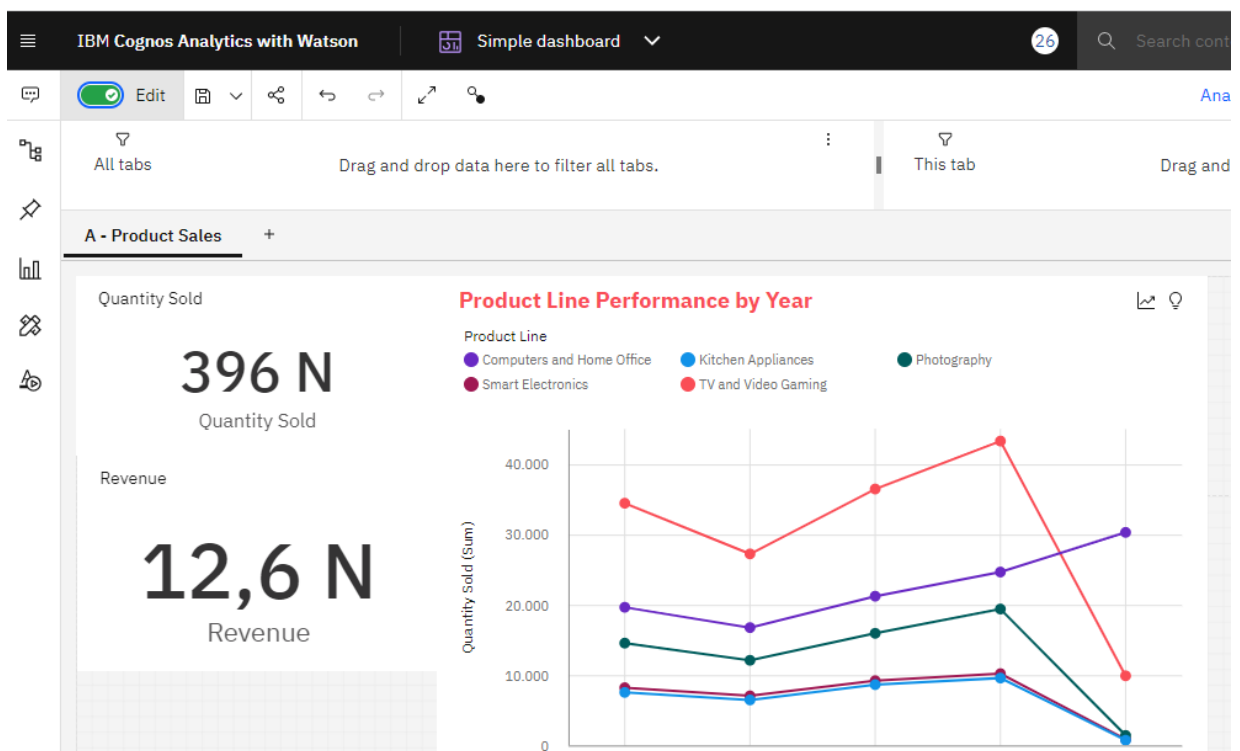
<div><p>1. To sign in to the Cognos Analytics platform with your IBMid, go to myibm.ibm.com/dashboard/.</p><p>2. Enter your IBMid and password.</p><p>3. Scroll down and click Launch. →Product/Analytics/ Cognos analytics</p></div>	<div></div>
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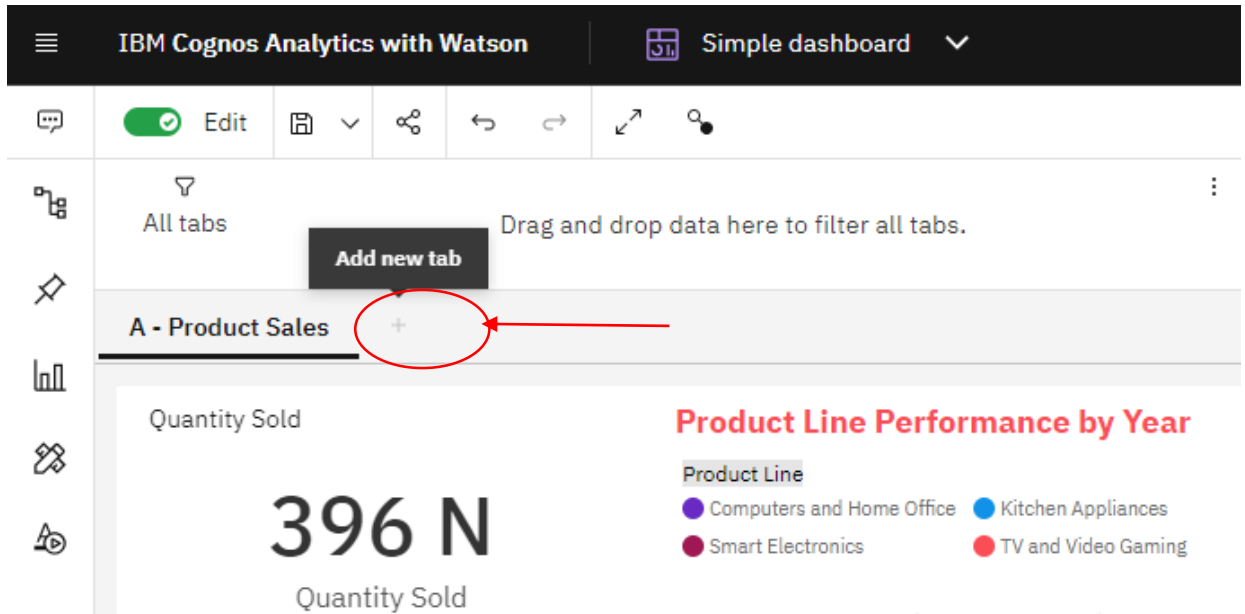
4. From the **Recent** section, click **Simple dashboard**.



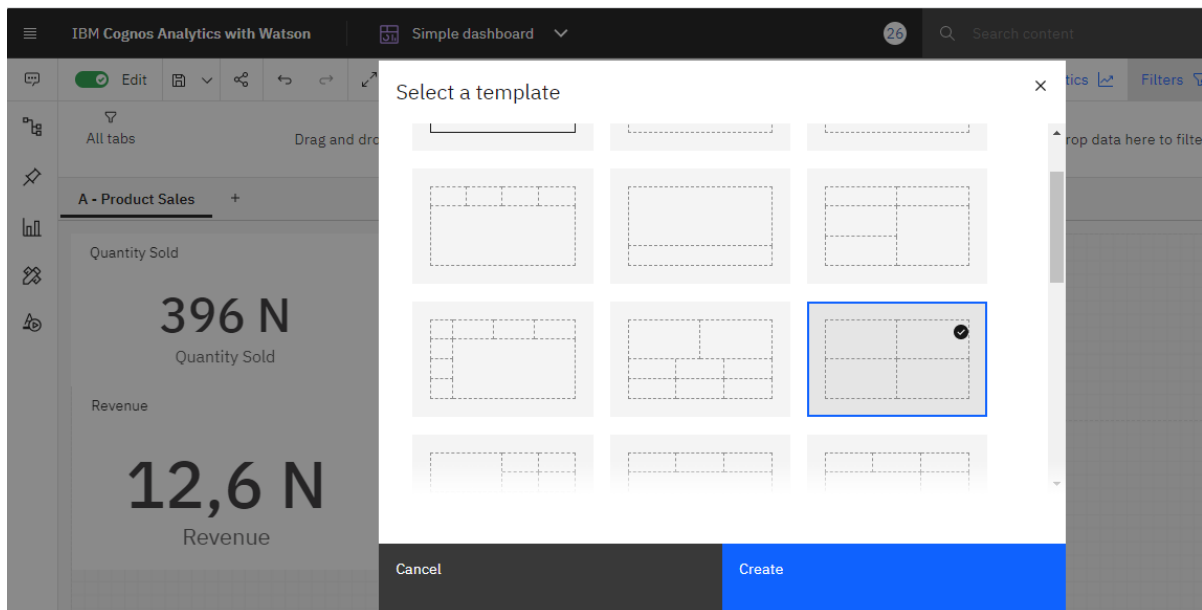
5. Click **Edit or preview** at the top left corner.



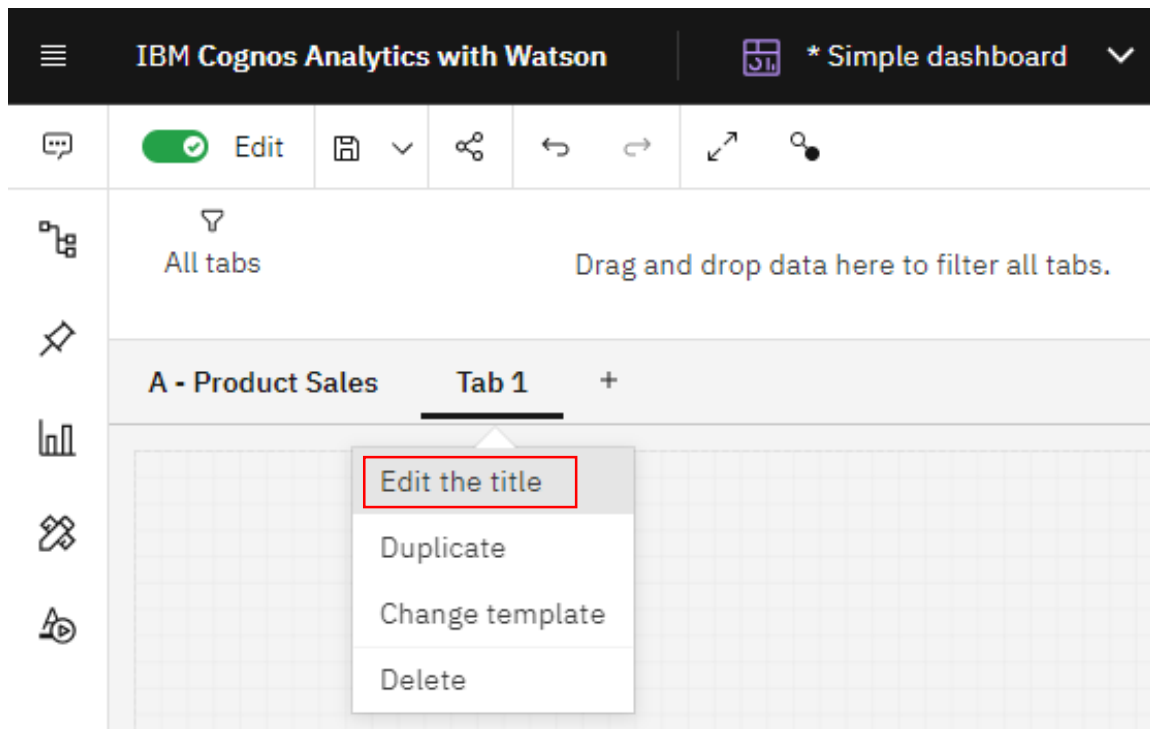
6. Click the **Add new tab** button to the right of the Dashboard A tab.



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**.

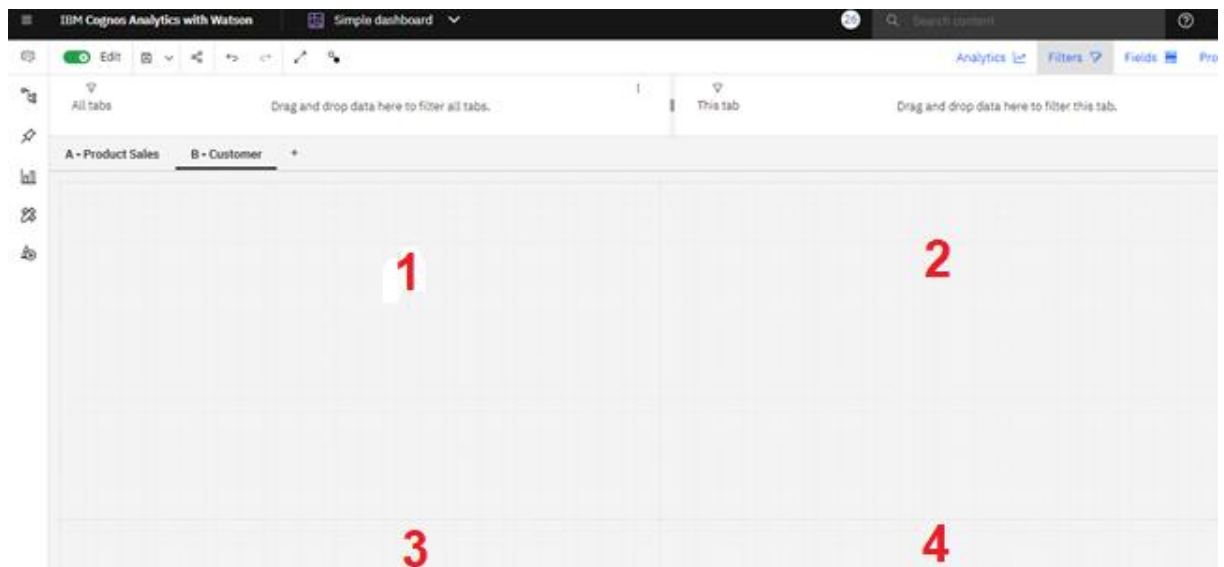


9. **Rename** the tab to "B - Customer".

Exercise 2: Different Methods for Creating Dashboard Visualization

In this exercise, you will learn different methods for creating dashboard visualizations.

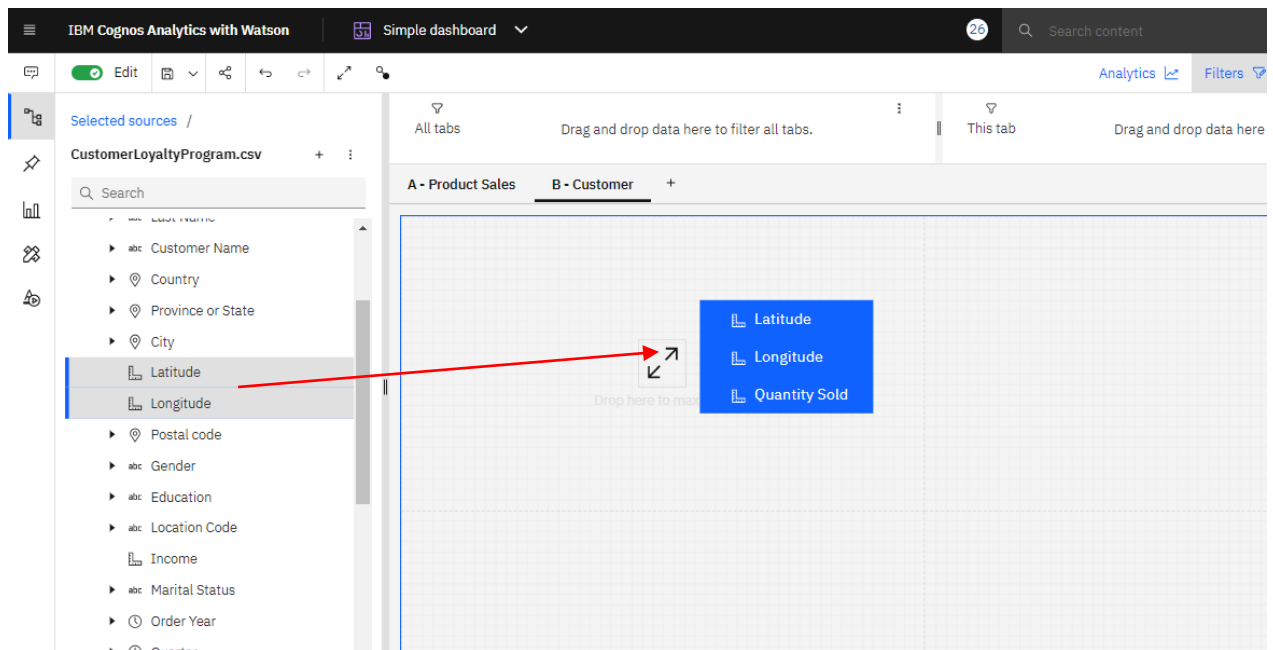
- As you build the dashboard, the location placement for Widgets in the dashboard template will be referenced using the following Panel numbers



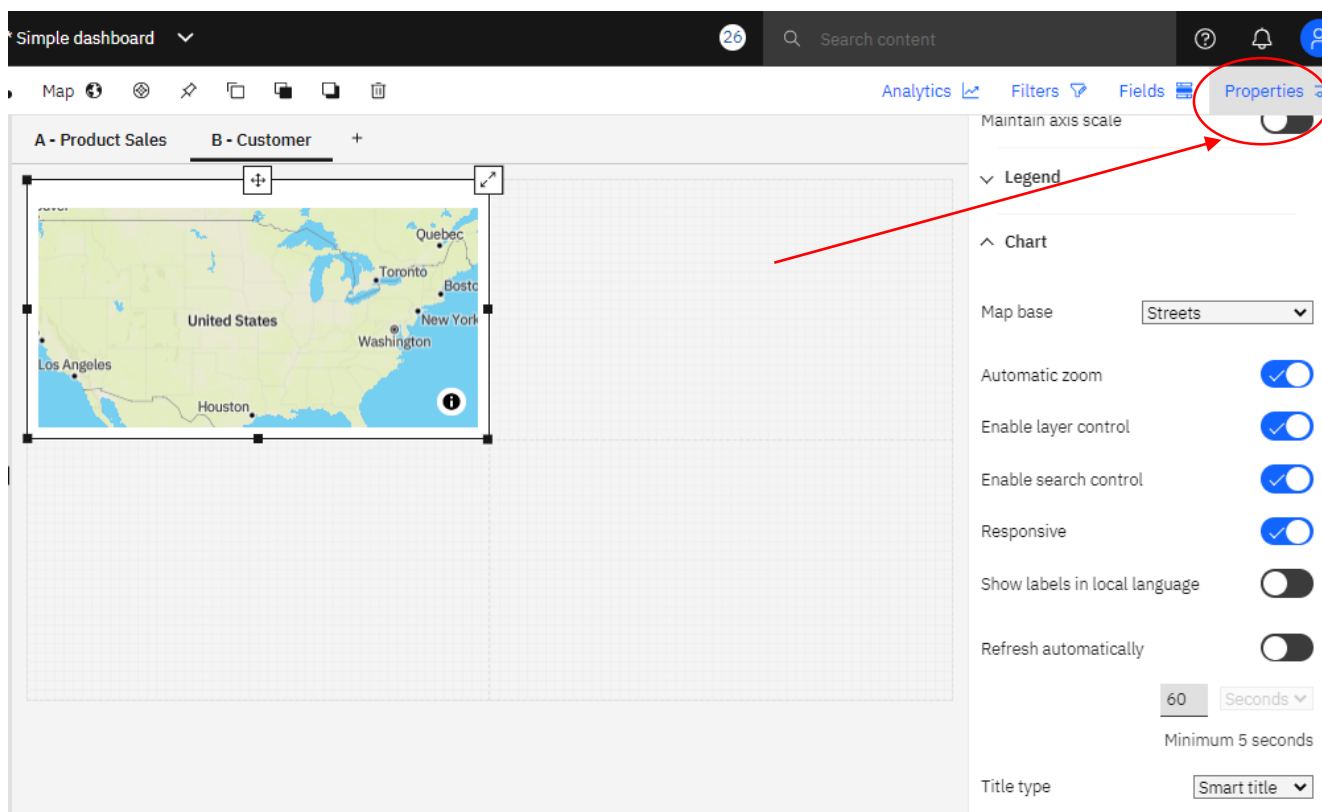
Task A: Using an Automatic Method to Create a Visualization for Panel 1

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.

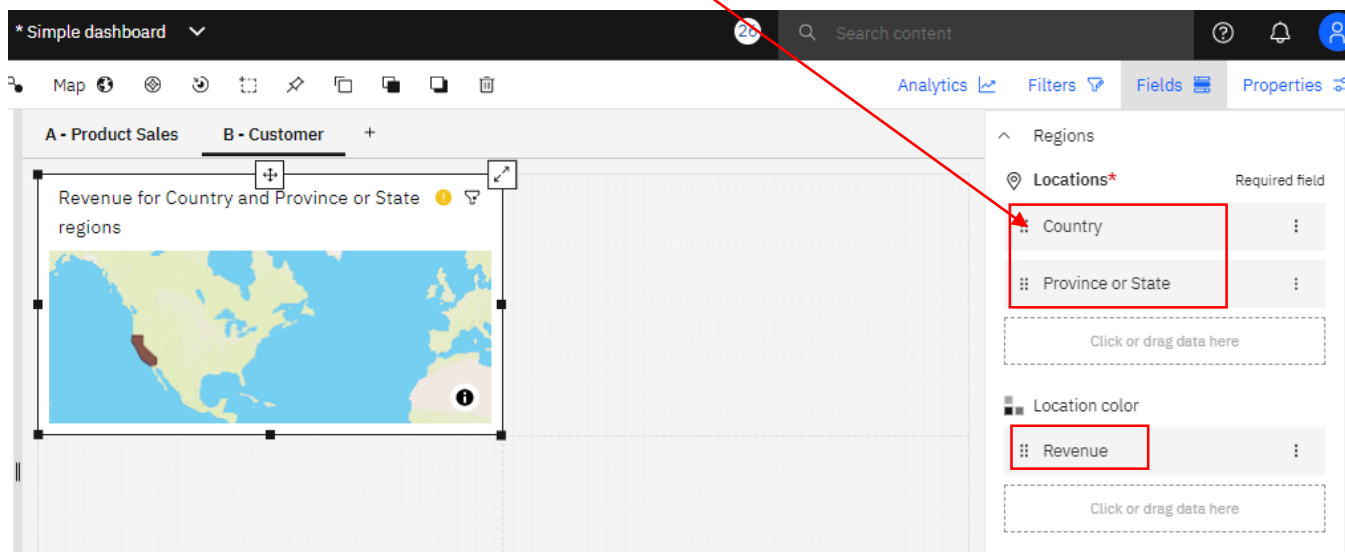
2. From the **Data Source** panel, expand CustomerLoyaltyProgram.csv, if needed.
3. From the **Data Source** panel, press **CTRL** and select **Latitude, Longitude, Quantity sold** and drag them to the center of **Panel 1**, releasing them once you see the **drop zone** turn blue.



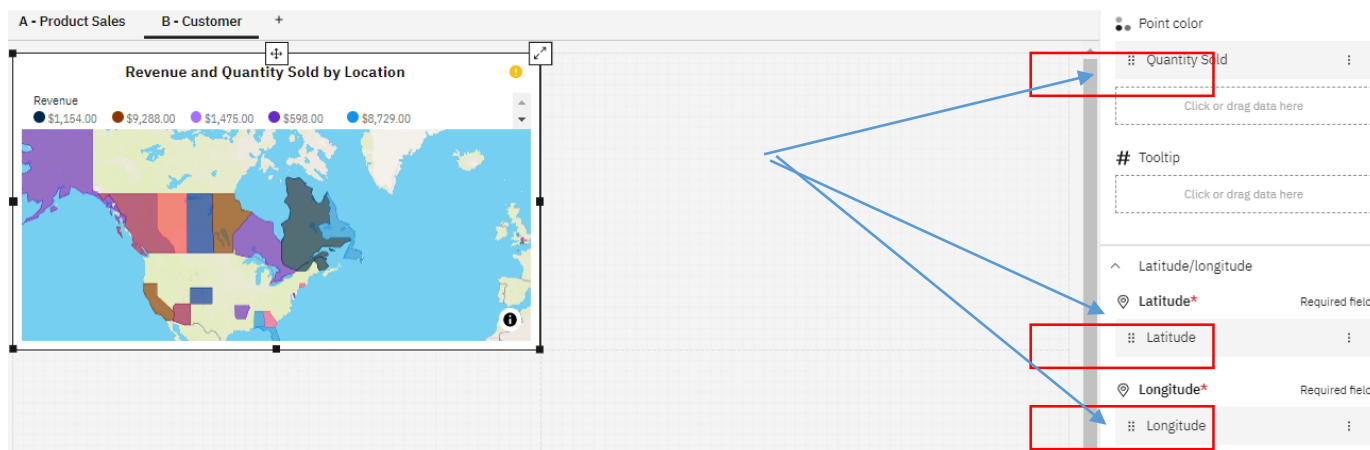
4. Click on the **Map chart** in **panel 1** to bring it into focus.
5. To change the map style, open the **Properties** panel and click the **down arrow next to Chart** to see the various options of maps available. Select **Streets** for **Style**.



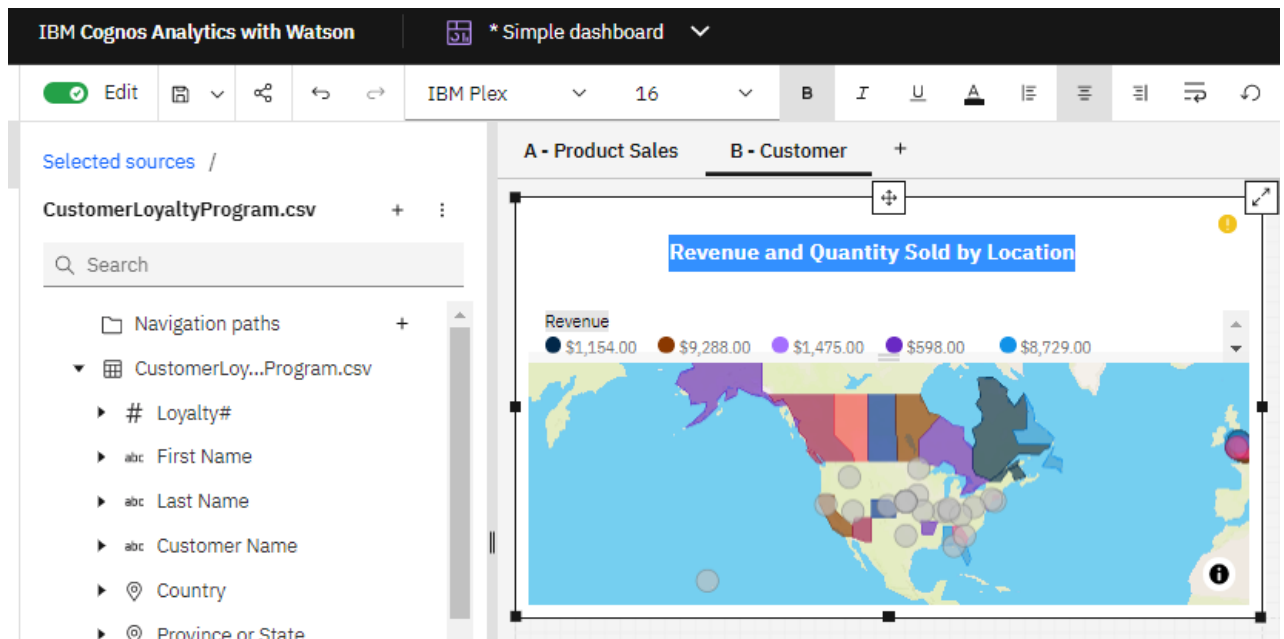
- Open the **Fields** panel to view the data slots. From the **Sources** panel on the left of the screen, drag and drop the **Country, Province or State, Revenue** into the **Locations, Locations, Location color** data slots of **Regions** of the Fields panel respectively.



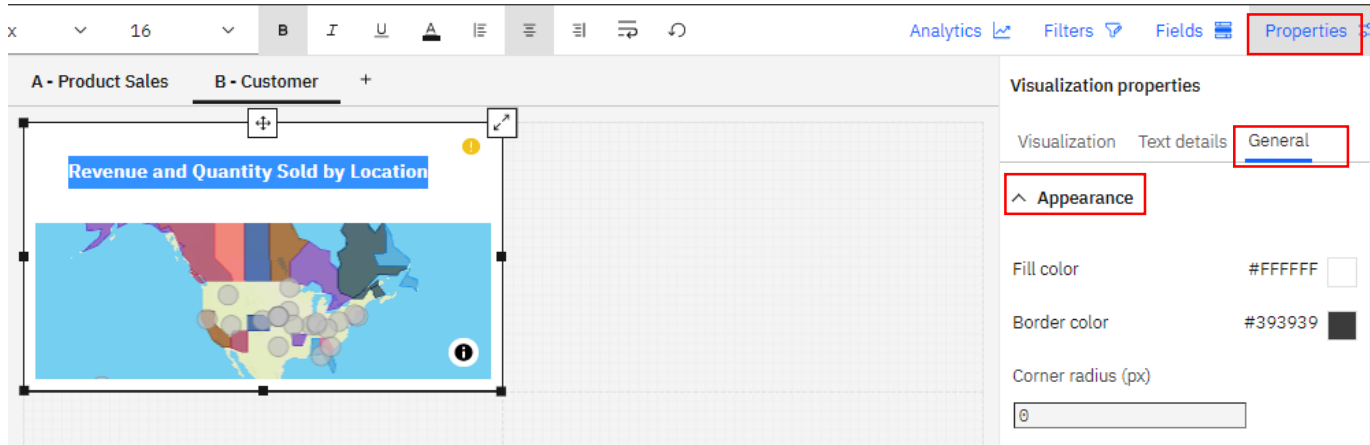
- Make sure to drag and drop the **Quantity Sold** into **Point color** data slot of **Latitude/longitude** of the Fields panel if needed.



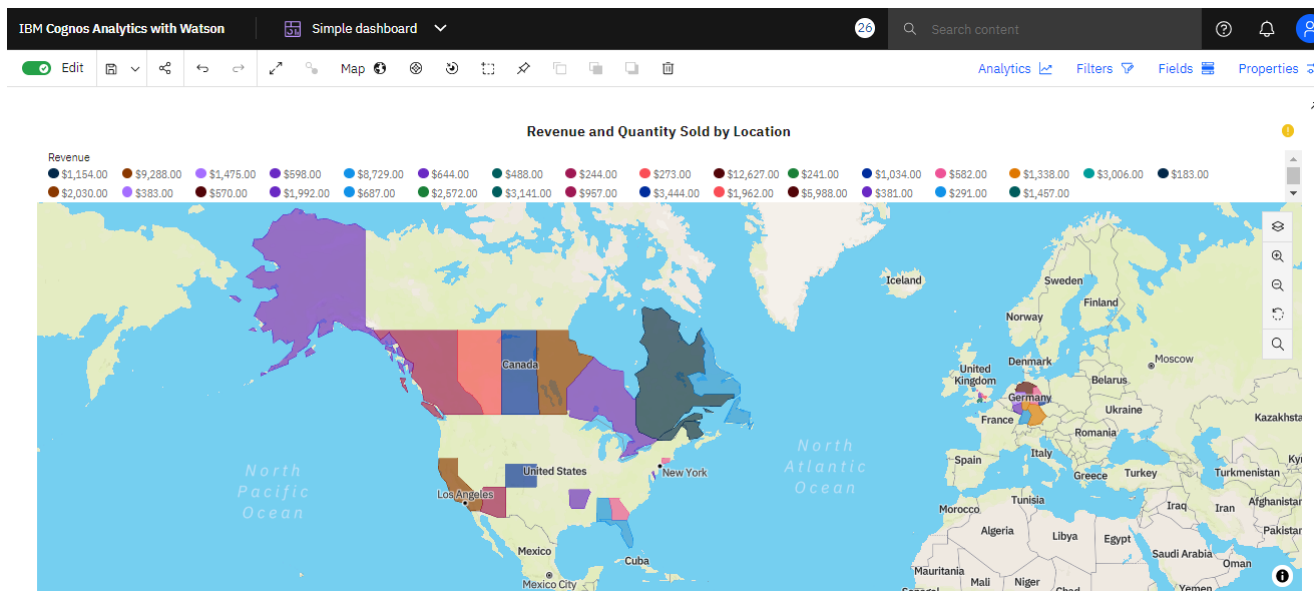
- Click on the **Fields** button to close the fields panel.
- Click on the **Map chart widget in Panel 1** to bring it into focus if needed. From the on-demand toolbar, click **Edit the title**. Enter the title "**Revenue and Quantity Sold by Location**" to the visualization.



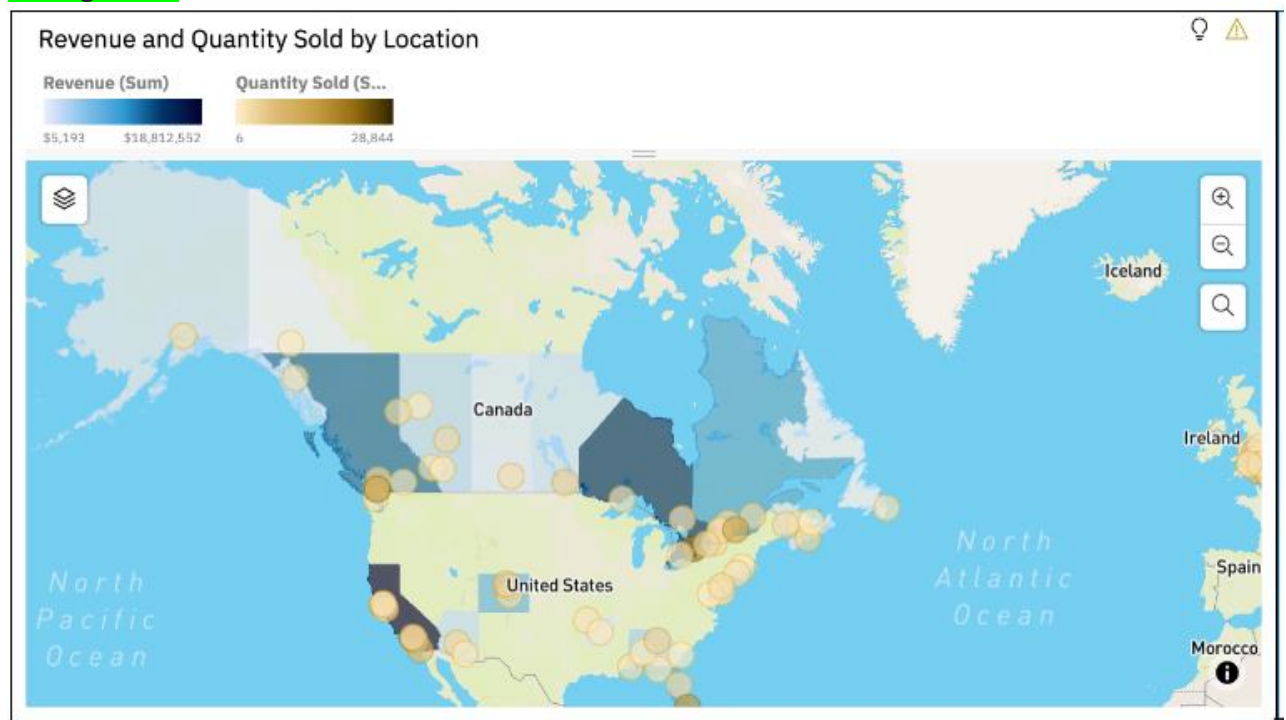
10. Click the **Properties** button in the top-right corner to open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a “**Black**” border.



11. To save the current work of the dashboard, press **CTRL+S**.
12. Your **Panel 1 widget** should look like the one below:



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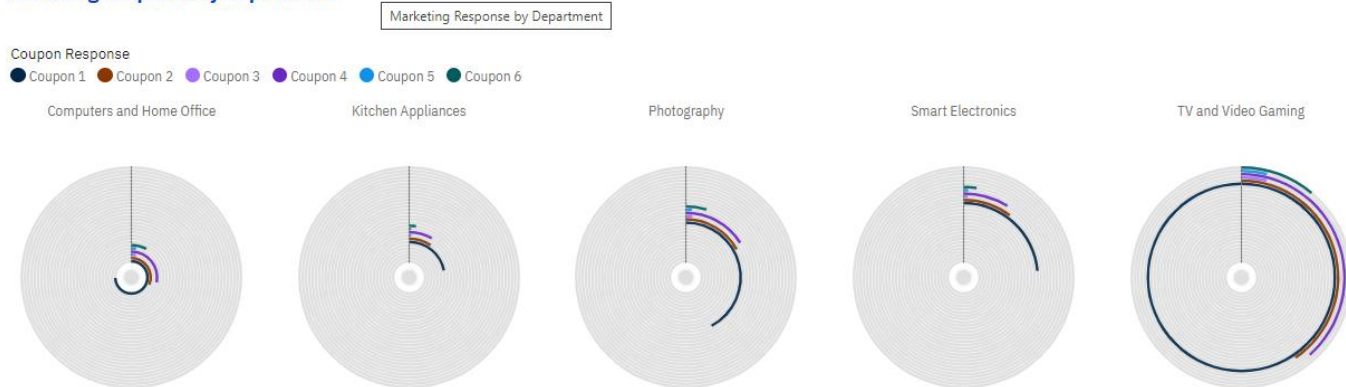


Task B: Using an Automatic Method to Create a Visualization for Panel 2

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**.

- Click on the **Fields** button to close the fields panel.
- 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.
- Click on the **Radial chart in Panel 2** 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 2 widget** should look like the one below:

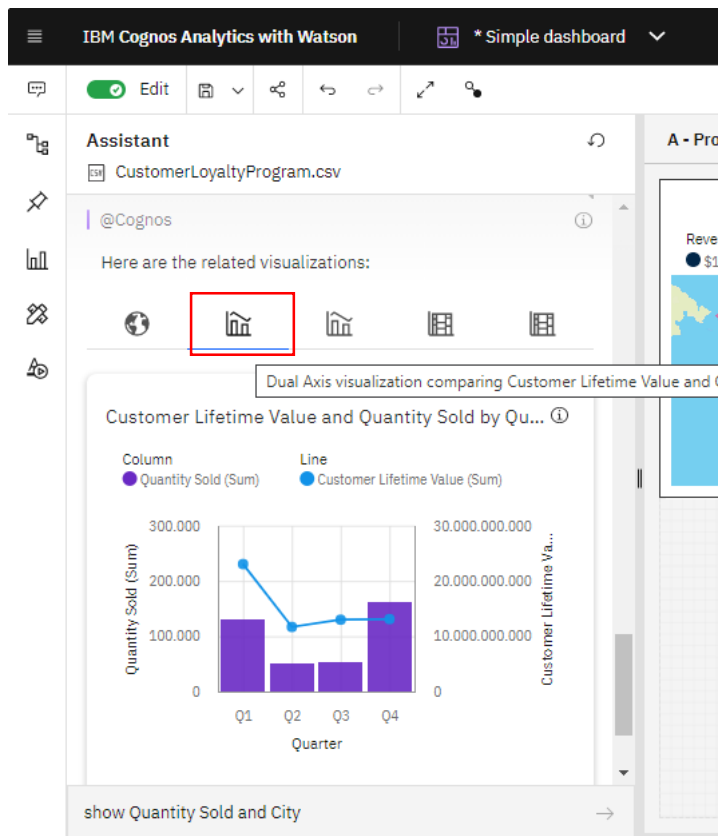
Marketing Response by Department



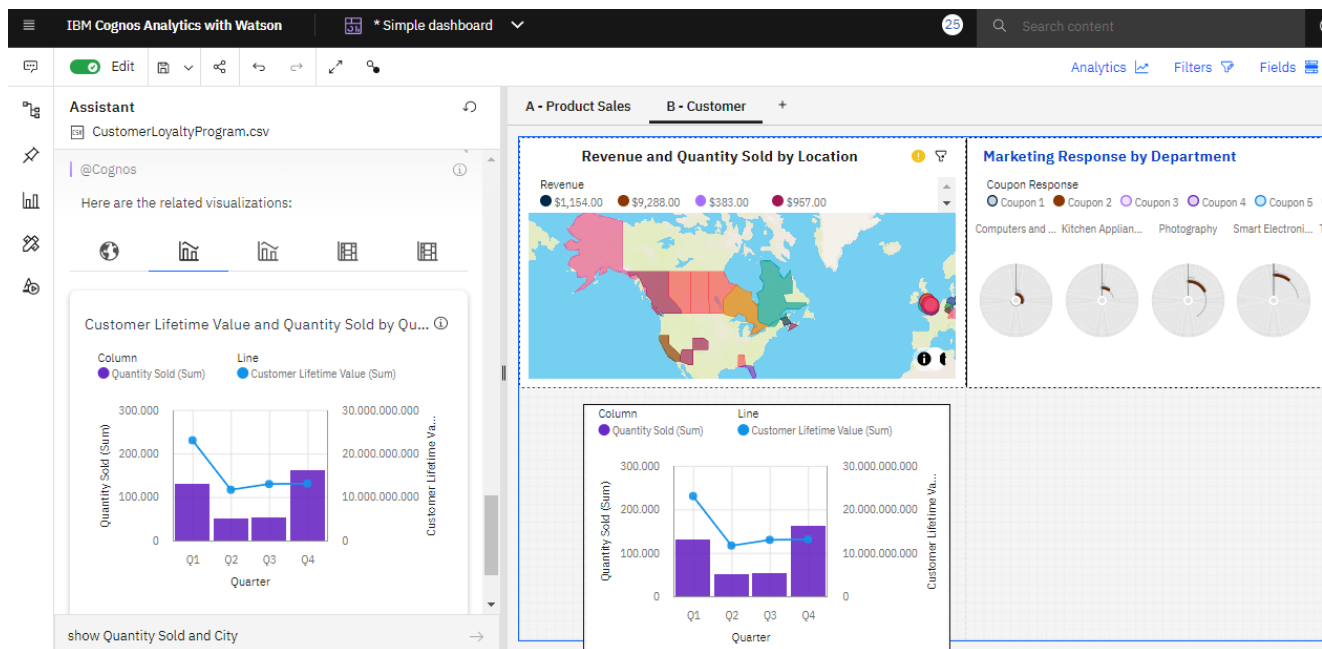
Task C: Using Cognos Assistant to Create a Visualization for Panel 3

- From the **Navigation** panel, select **Assistant** to open the **Cognos Assistant** panel.
- 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**.
- Click on **show related visualizations**.

- Select the second chart visualization.

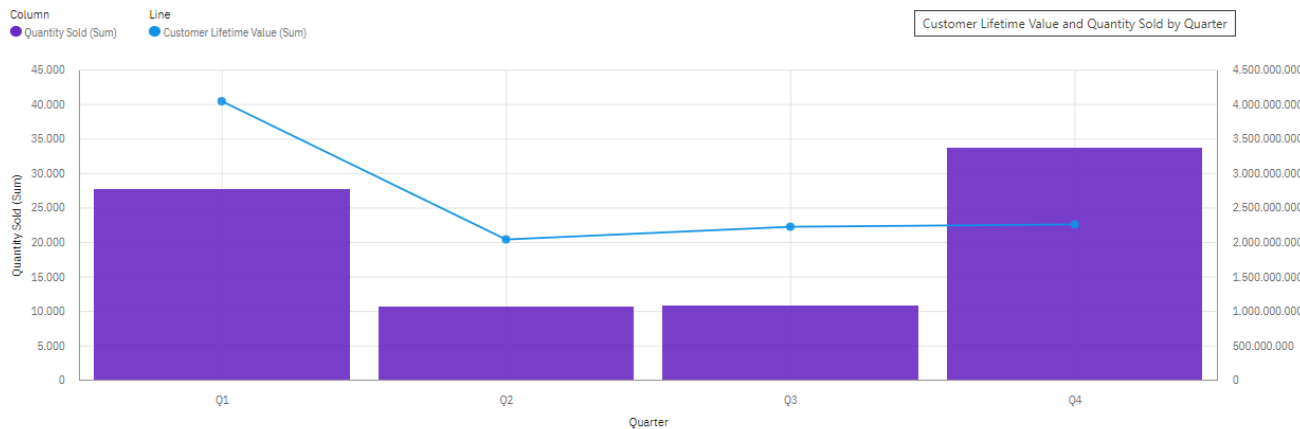


- From the **Cognos Assistant** panel, select the second chart visualization and drag it to the center of **Panel 3**, releasing it once you see the **drop zone turn blue**.



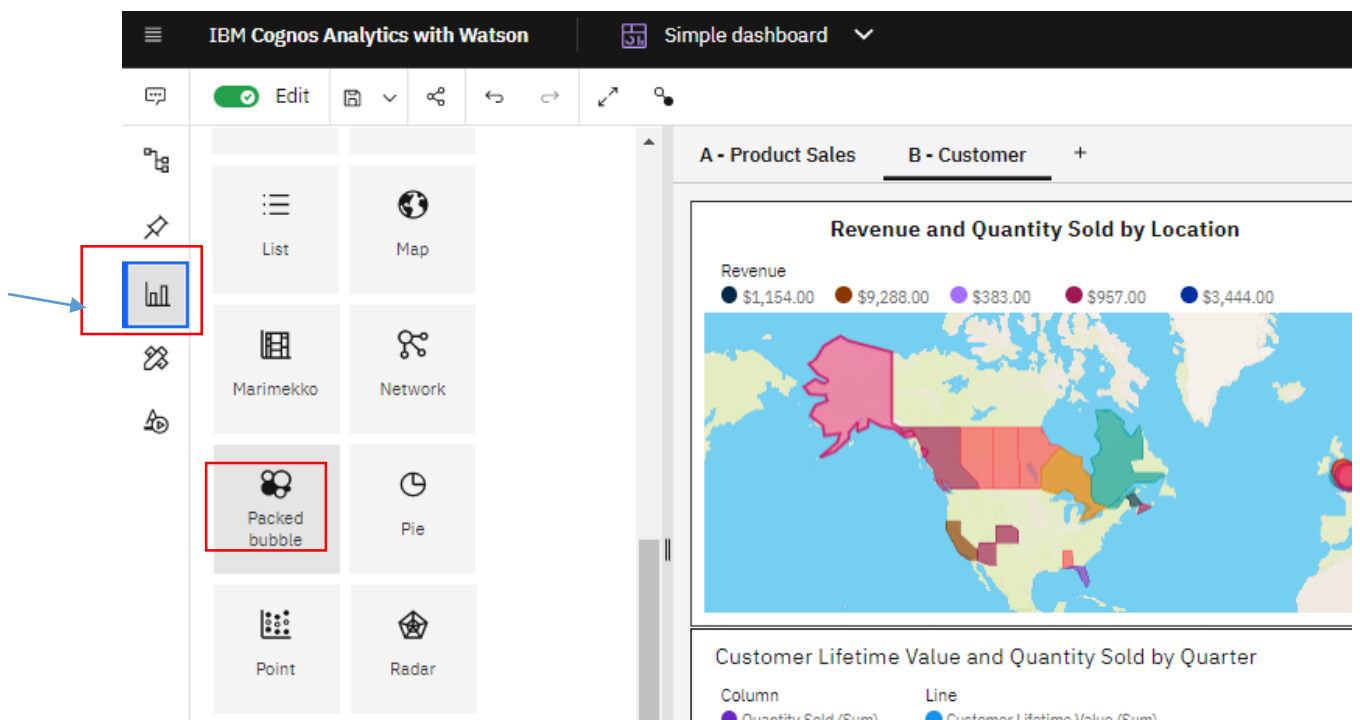
- Click on the **Line and column chart in Panel 3** if needed to bring it into focus.
- Open the **Properties** panel and click on the **General** tab. Expand the **down arrow** next to **Appearance**. Click on **Border Color** to open the color options for borders. Apply a "Black" border.
- To save the current work of the dashboard, press **CTRL+S**.
- Your **Panel 3 widget** should look like the one below:

Customer Lifetime Value and Quantity Sold by Quarter

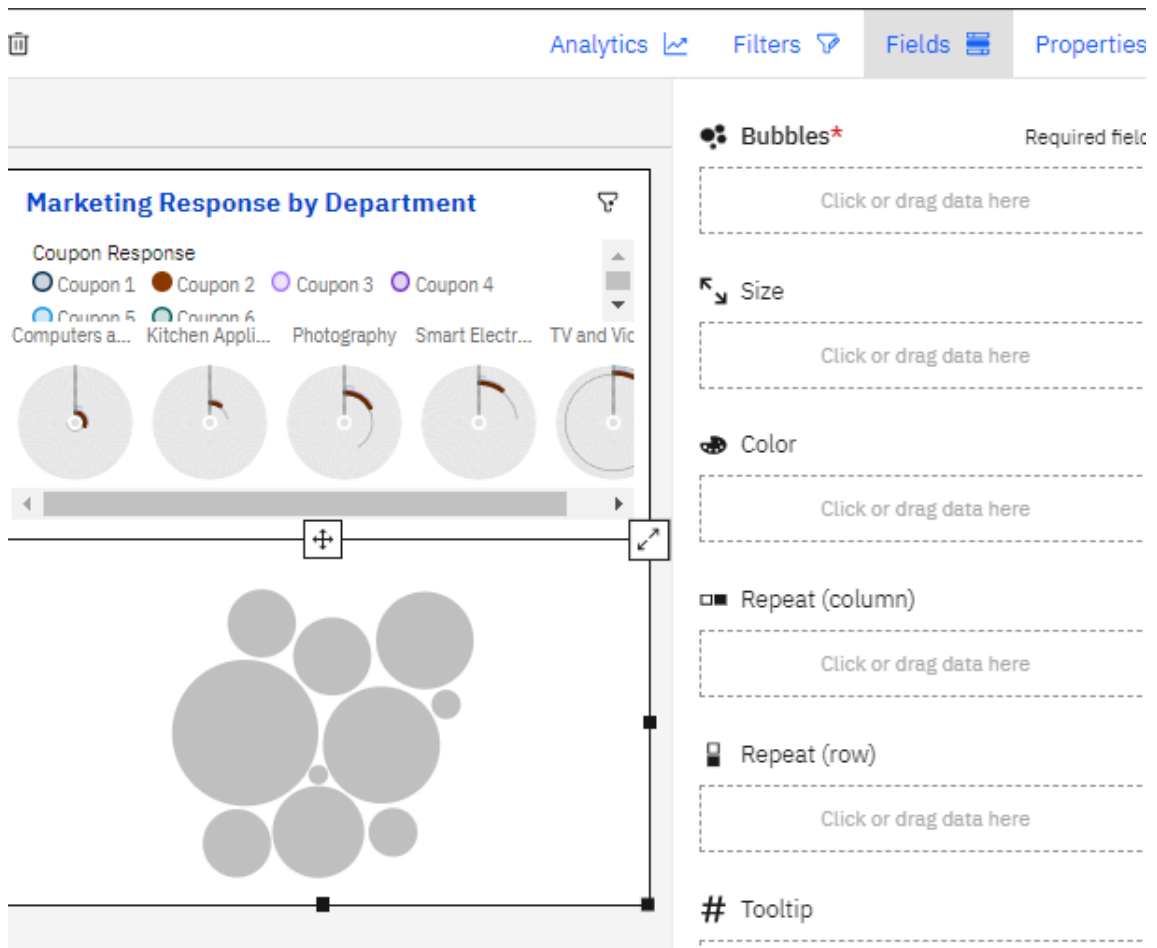


Task D: Using a Manual Method to Create a Visualization for Panel 4

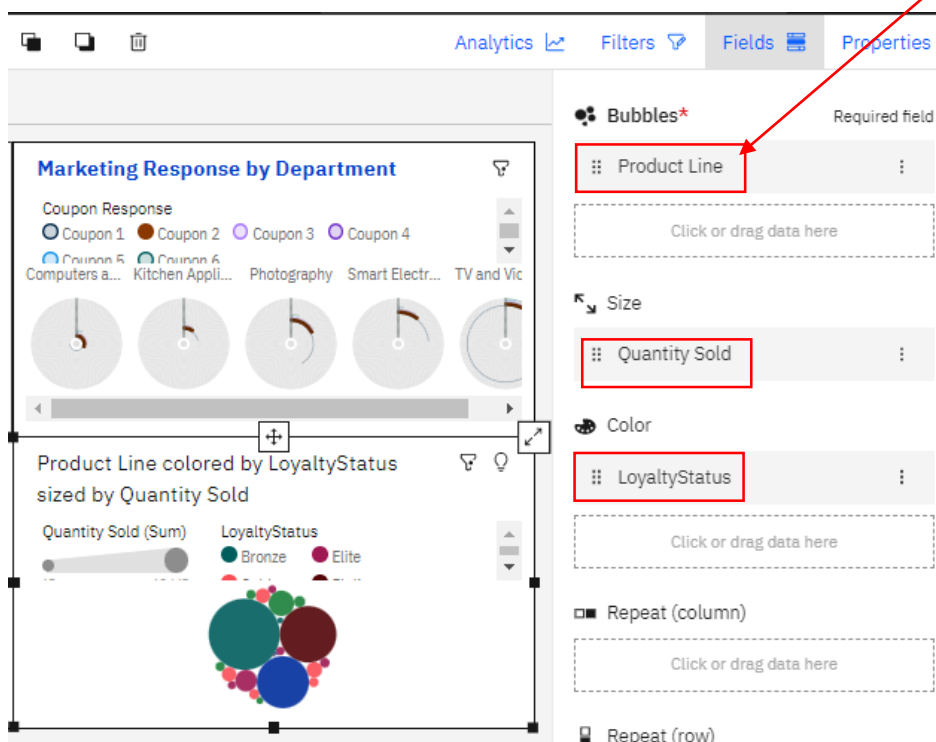
1. From the **Navigation** panel, select **Visualizations** to open the Visualizations library.
2. Select the **Packed Bubble** chart, and drag it to the center of **panel 4** of the dashboard template, releasing it once you see the **drop zone turn blue**.



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.



- ### Department Sales by Loyalty Status
-
- Quantity Sold (Sum)
- LoyaltyStatus
- Bronze
 - Elite
 - Gold
 - Platinum
 - Silver
 - VIP
- 17 15.647
- Computers and Home Office
- TV and Video Gaming
- Photography
- Smart Home
- Kitchen
- TV and Video Gaming

