

## Advanced Dashboard Capabilities in Cognos Analytics

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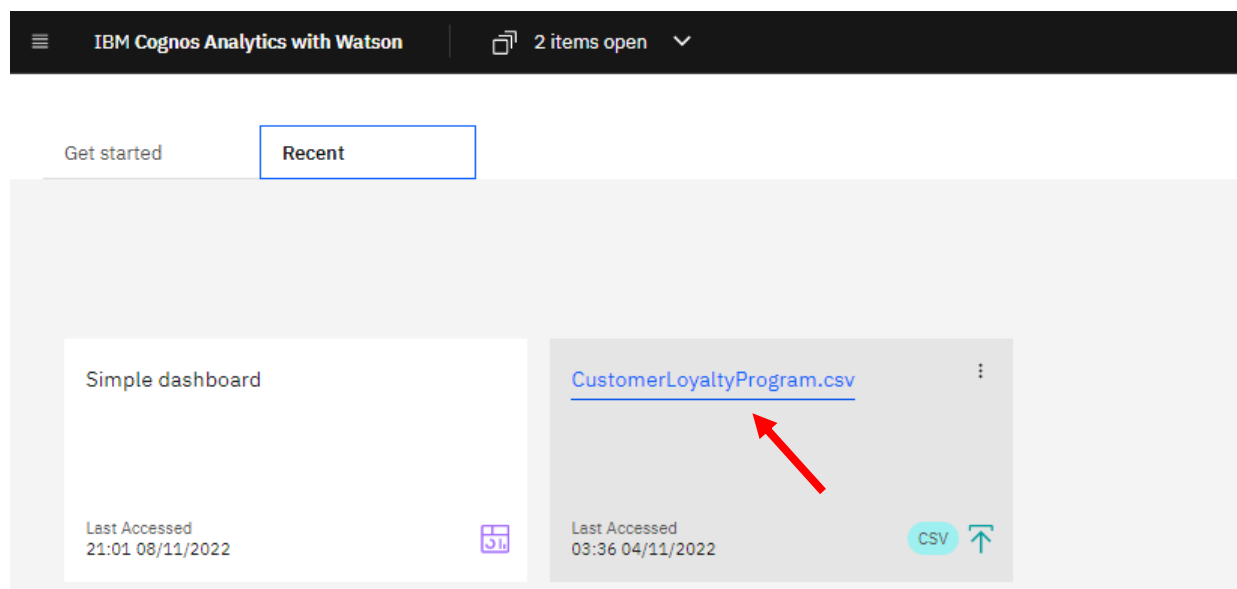
In this lab, you will learn and leverage some advanced Cognos Analytics dashboard capabilities. After completing this lab, you will be able to:

- 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.

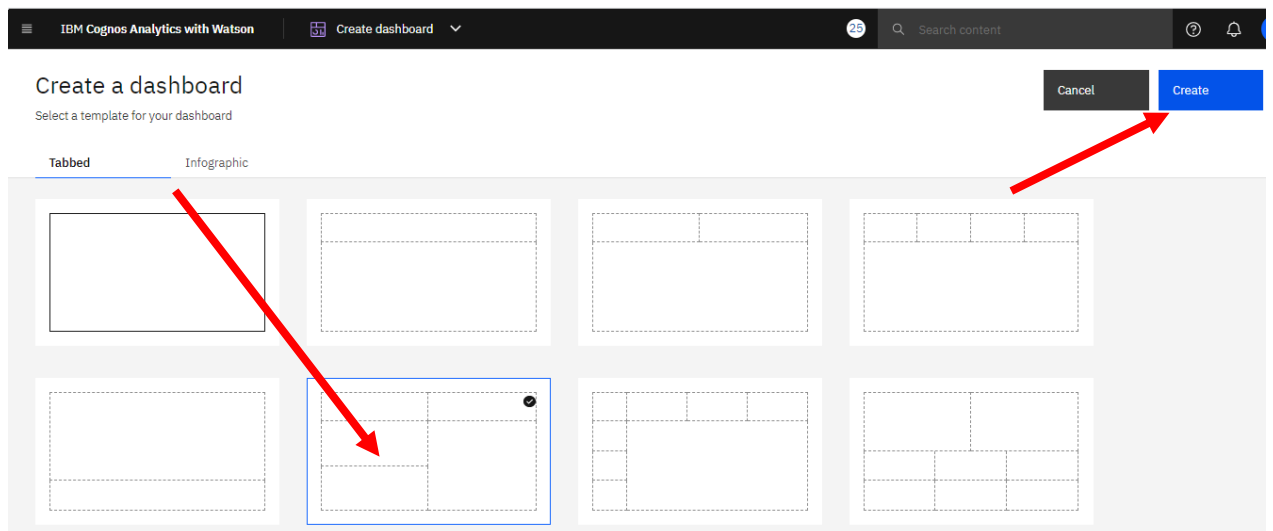
### Exercise 1: Start a New Dashboard

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

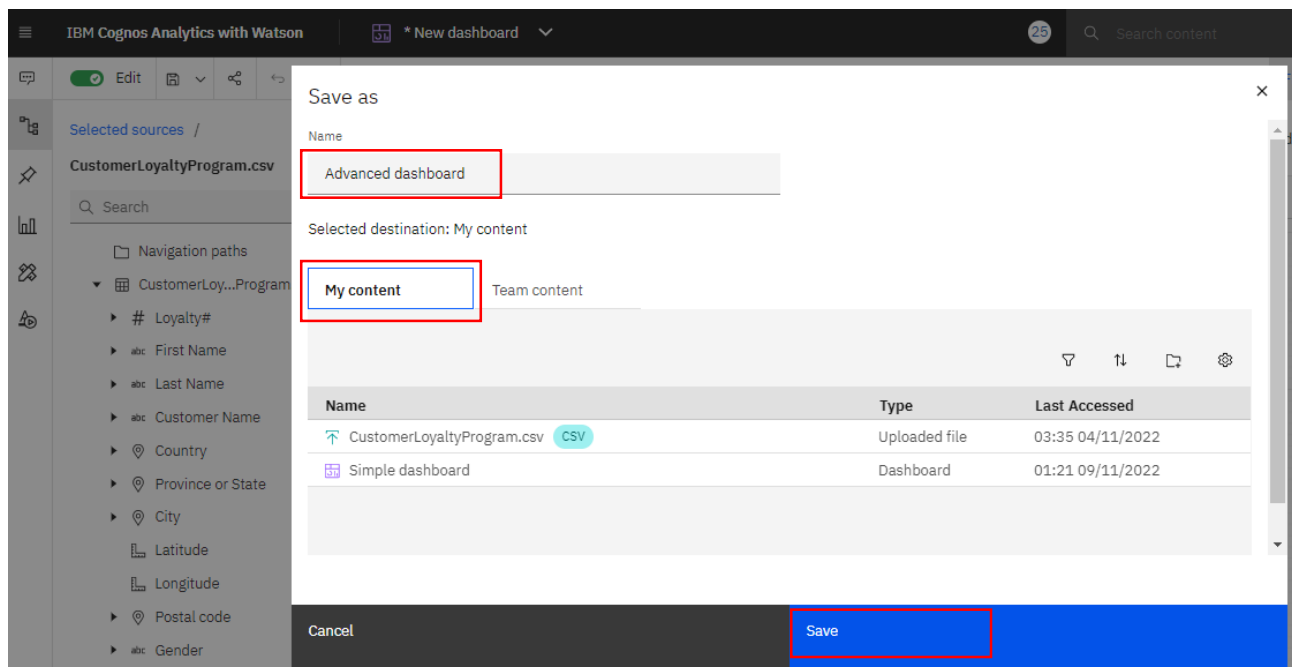
1. To sign in to the Cognos Analytics platform with your IBMid, go to [myibm.ibm.com/dashboard/](https://myibm.ibm.com/dashboard/).
2. Enter your IBMid and password.
3. Scroll down and click **Launch**.
4. From the **Recent** section, click on the uploaded data file **CustomerLoyaltyProgram.csv**.



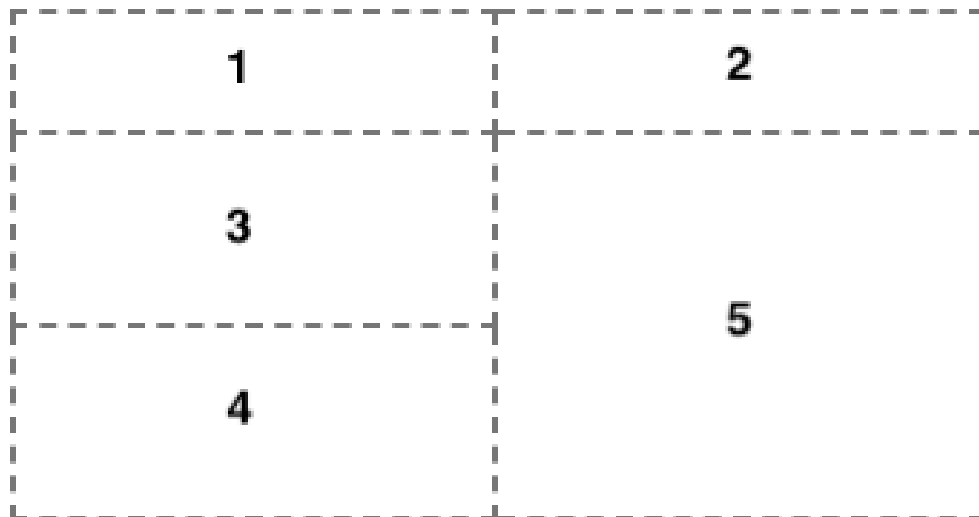
5. The Template window will be displayed, allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **five-panel template**, then click **Create**.



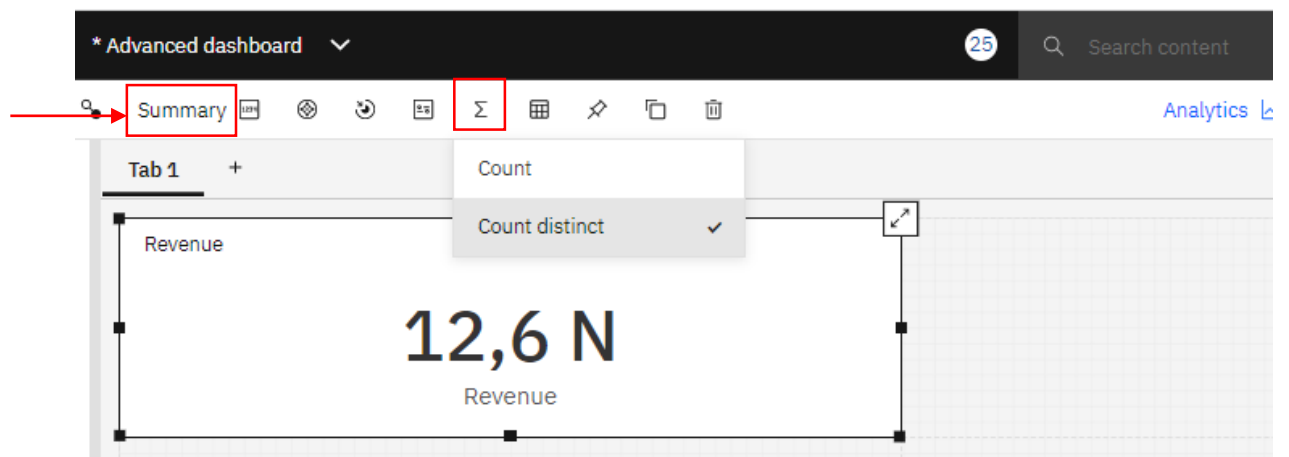
6. To save the newly created dashboard, press **CTRL+S**. Select 'My content' as the Destination. On the **Save as:** text field, type "**Advanced dashboard**", and click **Save**.



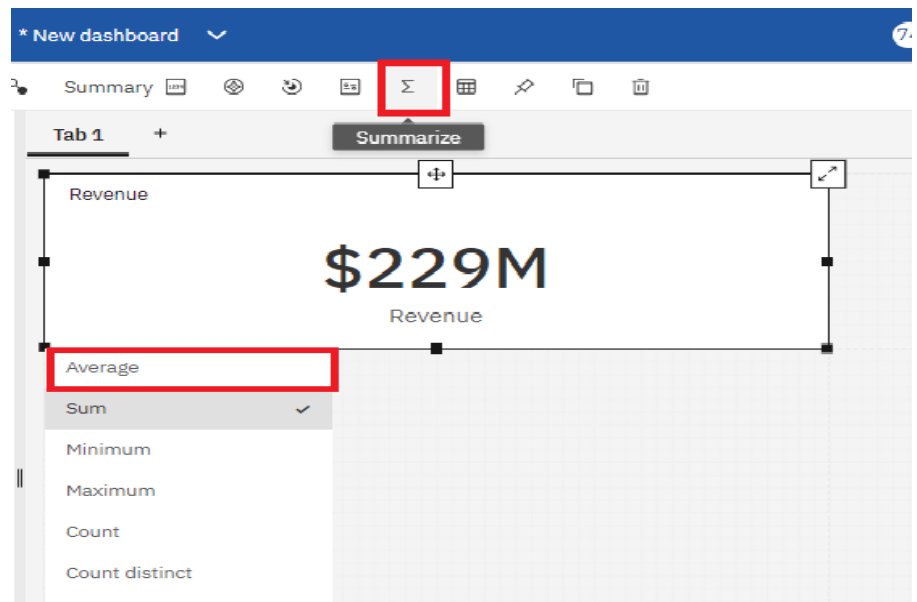
7. As you build the dashboard, the location placement for Widgets in the dashboard template will be referenced using the following Panel numbers.



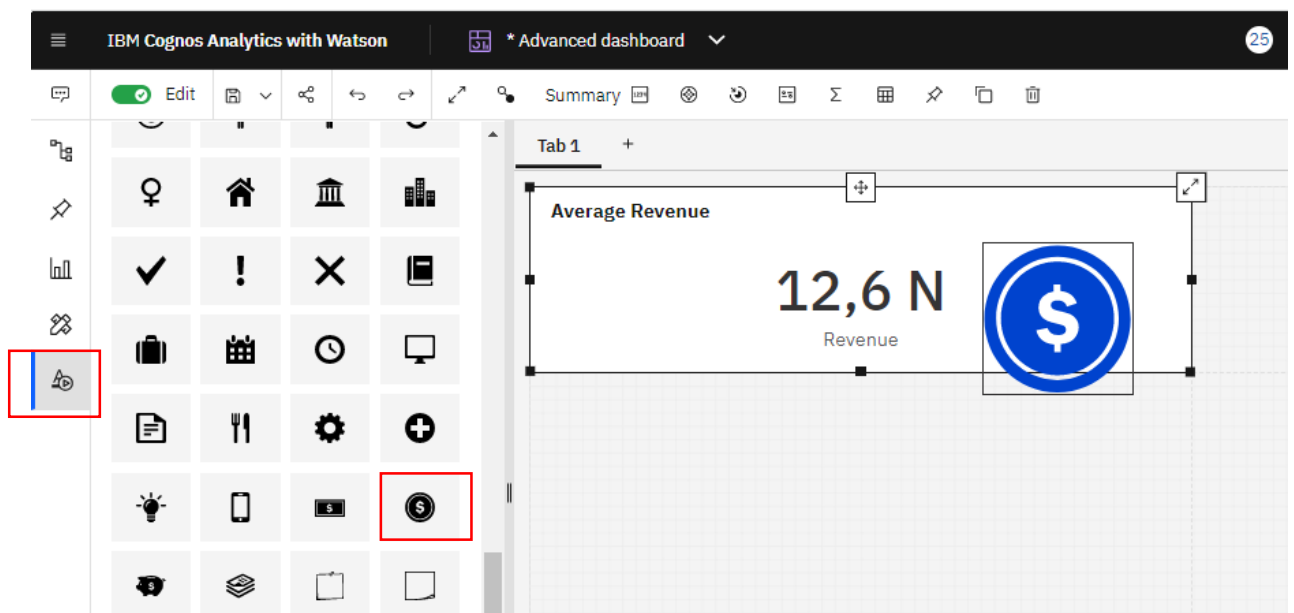
8. From the **Data Source panel**, select **Revenue** and drag it to the center of **Panel 1**, releasing it once you see the **drop zone turn blue**.
9. Click on the **Summary chart in Panel 1** to bring it into focus. From the **on-demand toolbar**, click **Summarize**. Then select **Average**.



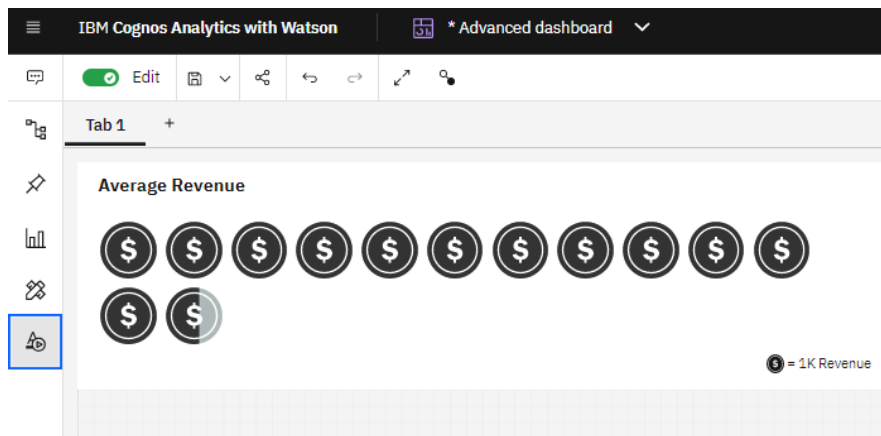
phiên bản này thiếu: Sum, Average; không được như hình chuẩn của IBM



10. Click on the **Summary chart in Panel 1** if needed to bring it into focus. From the on-demand toolbar, click **Edit the title**. Enter the title "**Average Revenue**" to the visualization.
11. From the **Navigation** panel, select **Widgets** to open the widgets panel. Drag and drop **Money coin** from **Shapes** to the center of **Panel 1**.



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



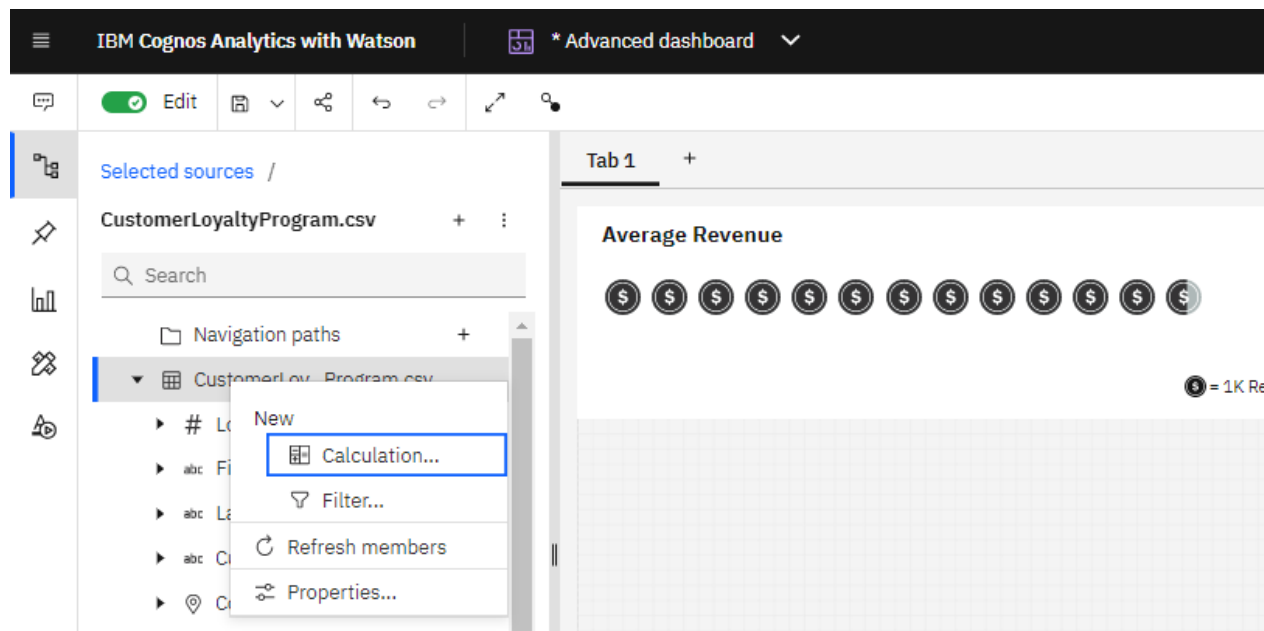
## Exercise 2: Working with Advanced Cognos Analytics Dashboard Capabilities

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

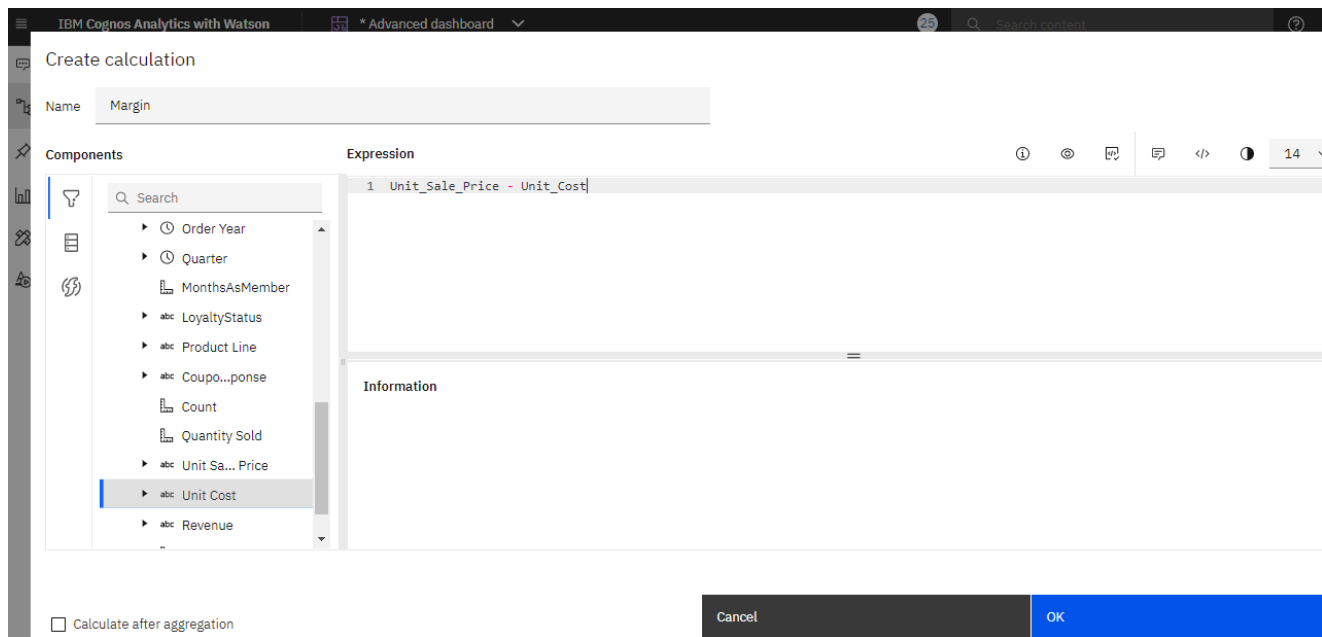
- Task A: Create Calculations
- Task B: Keep/Exclude Data Points from a visualization
- Task C: Set Top/Bottom on a visualization
- Task D: Create and Leverage Navigation Paths
- Task E: Filter Data in Current tab

### Task A: Create Calculations

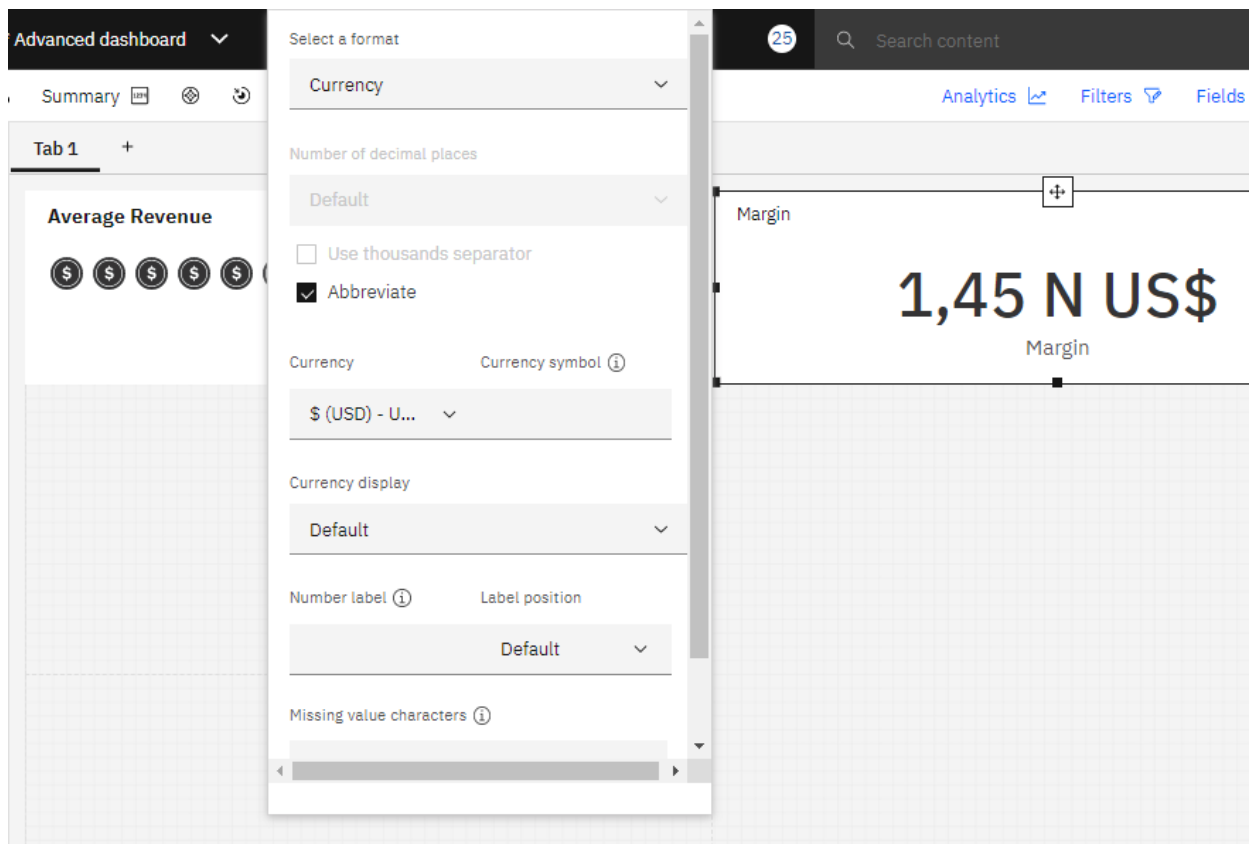
1. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the uploaded file “**CustomerLoyaltyProgram.csv**” as the Selected Source.
2. **Right-click** on the **CustomerLoyaltyProgram.csv** of data source panel and select **Calculation**.



3. Name the calculation as "**Margin**". From panel **Components** to the field **Expression**, drag and drop **Unit\_Sale\_Price**, type minus - and then drag and drop **Unit\_Cost**. Click **OK**.



4. On the Data Source panel, expand CustomerLoyaltyProgram.csv, if needed. From the **Data Source** panel, select **Margin** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone** turn blue.
5. Click on the **Summary chart in Panel 2** to bring it into focus. **Right-click** on the **Summary chart in Panel 2** and select **Summarize**. Then select **Average**.
6. Right-click on the **Summary chart in Panel 2** and select **Format**. Then select **Currency**. Finally select **\$(USD)** as the currency.



7. Click on the **Summary chart in Panel 2** if needed to bring it into focus. From the on-demand toolbar, click **Edit the title**. Enter the title "**Average Margin**" to the visualization.
8. To save the current work in the dashboard, press **CTRL+S**.
9. Your **Panel 2 widget** should look like the one below:

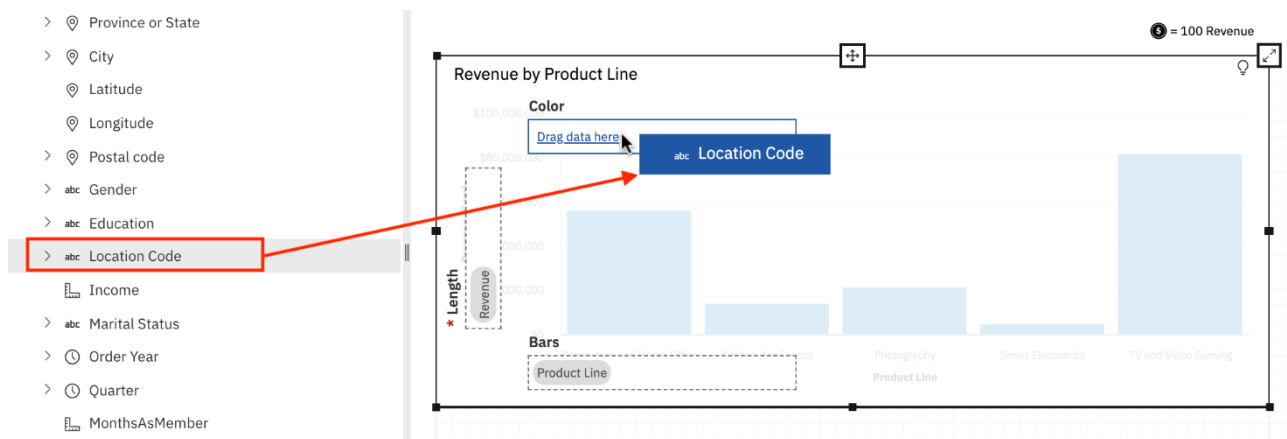
## Average Margin

# 1,45 N US\$

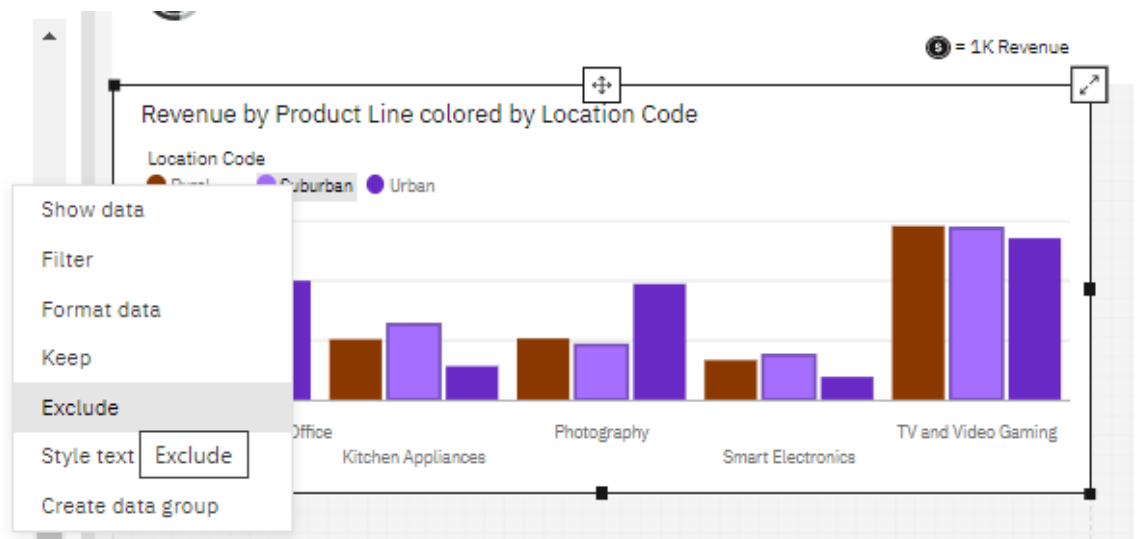
Margin

### Task B: Keep/Exclude Data Points from a Visualization

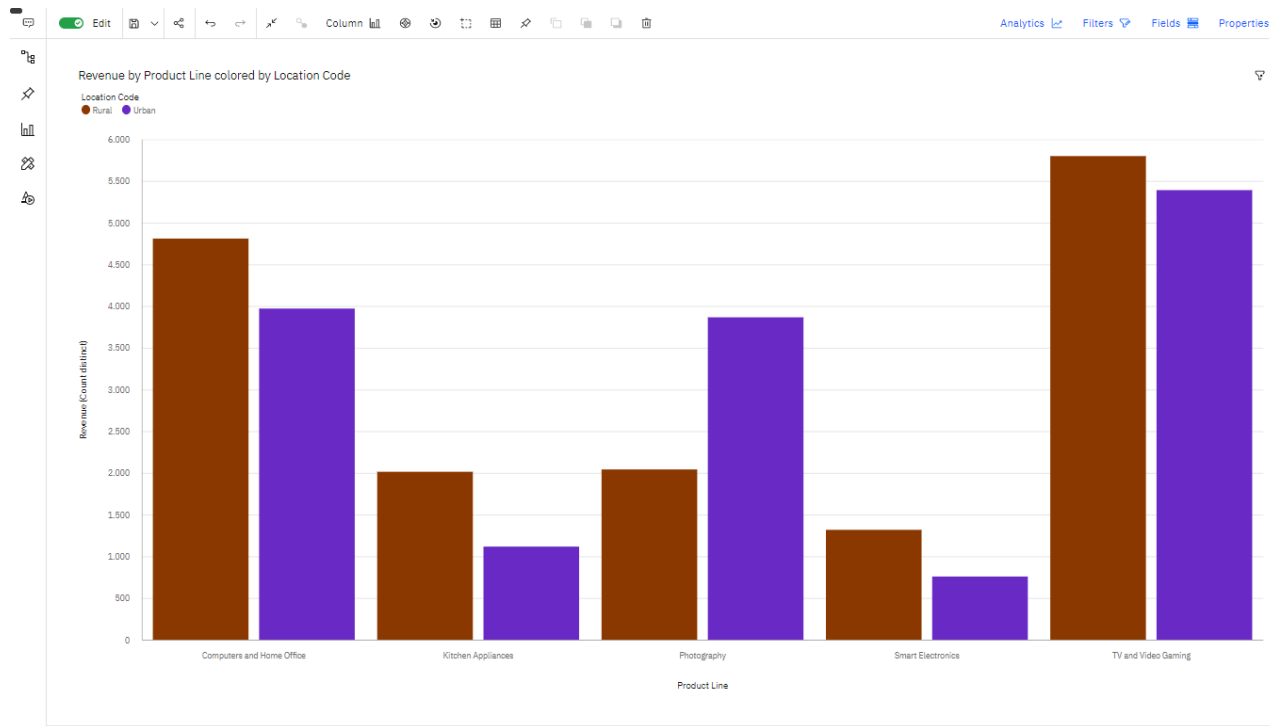
1. On the Data Source panel, expand CustomerLoyaltyProgram.csv, if needed. From the **Data Source** panel, press **CTRL** and select **Revenue**, **Product Line** and drag it to the center of **Panel 3**, releasing it once you see the **drop zone** turn blue.
2. From the **Data Source** panel, press select **Location Code** and drag it to the **drop zone of Color** of Panel 3.



3. Right-click on the **Suburban** data point of the panel 3 visualization. Select **Exclude**.

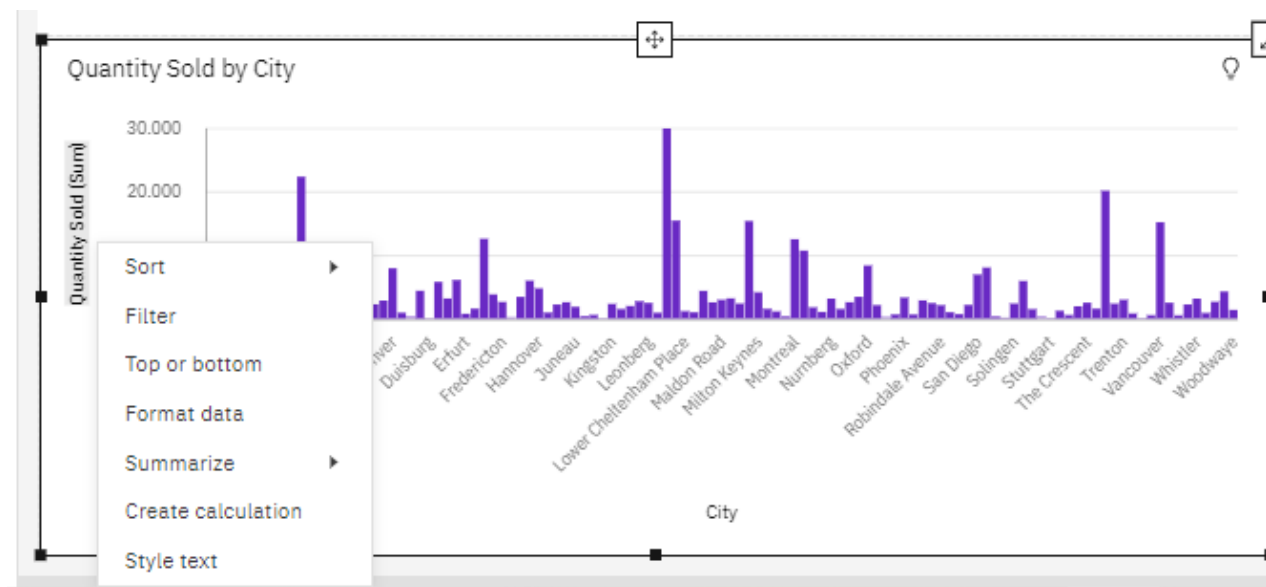


4. To save the current work in the dashboard, press **CTRL+S**.
5. Your **Panel 3 widget** should look like the one below:



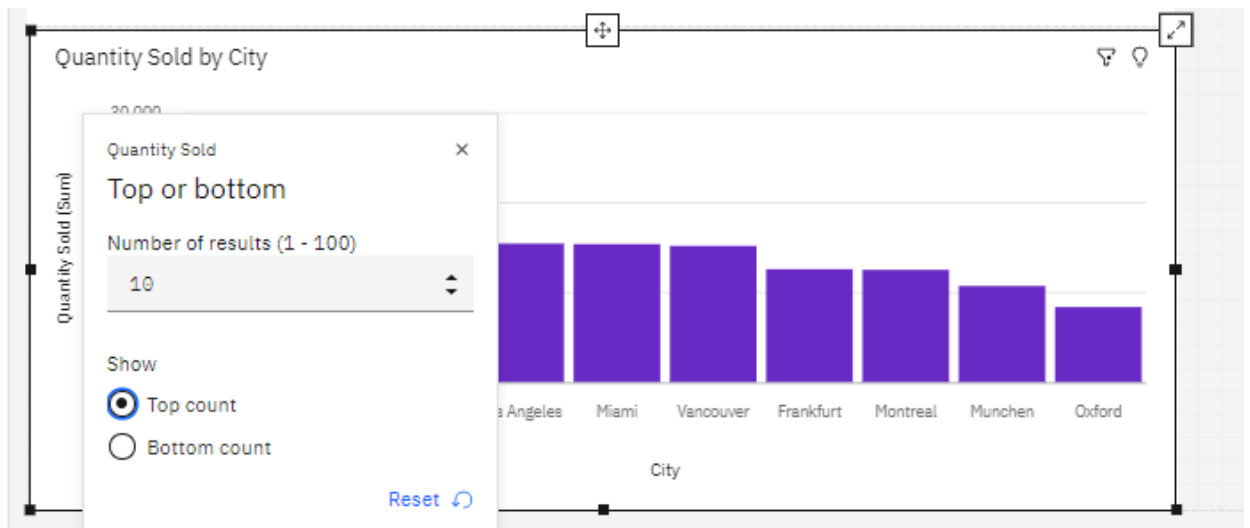
### Task C: Set Top/Bottom on a Visualization

1. From the **Data Source** panel, press **CTRL** and select **Quantity Sold, City** and drag it to the center of **Panel 4**, releasing it once you see the **drop zone turn blue**.
2. Click on 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. Use the **arrow ">"** to expand **All Visualizations**. Find and select **Column**.
4. Click on the **Column chart in panel 4** to bring it into focus. **Right-click** on the axis label **Quantity Sold (Sum)** and select **Top or bottom**. →click vào chữ Quantity Sold (Sum)

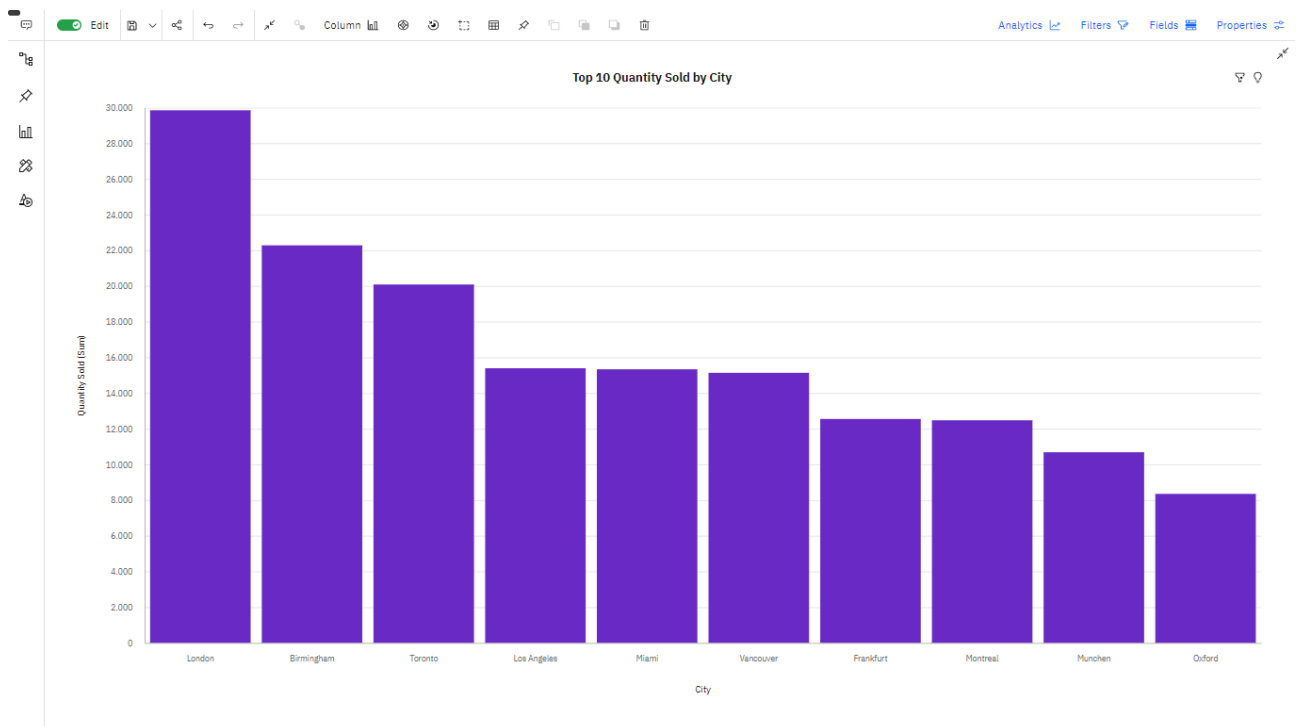


5. Set the **value of Number of results** as **10**. Select **Top count**.



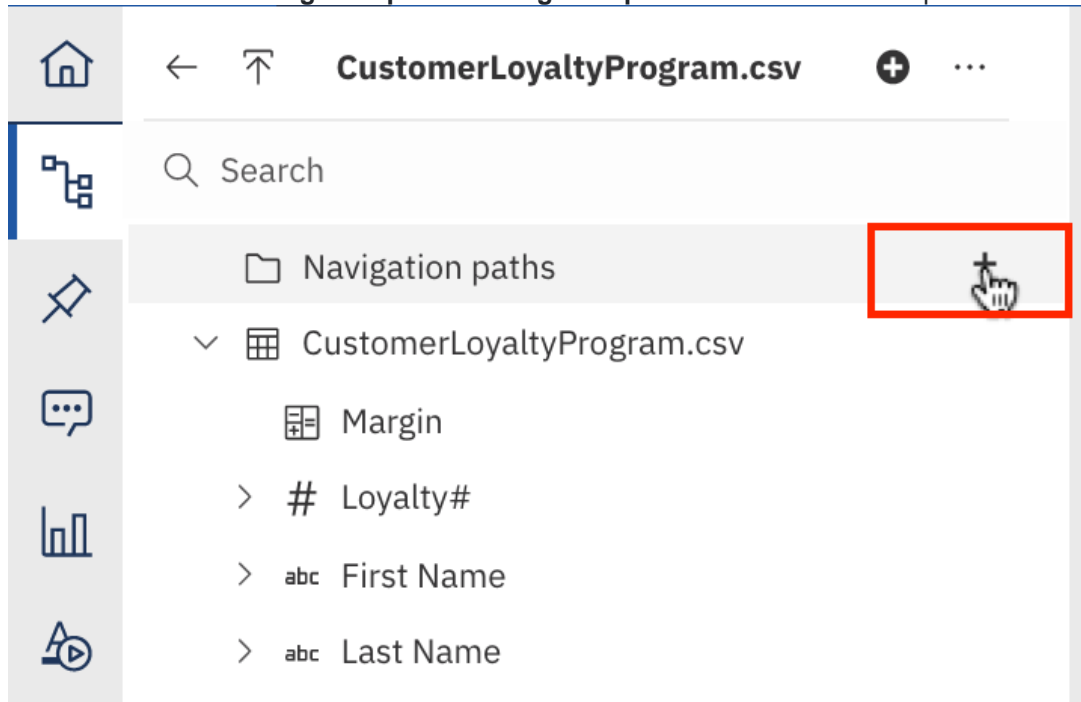


- From the on-demand toolbar, click **Edit the title**. Enter the title "**Top 10 Quantity Sold by City**" to the visualization.
- To save the current work in the dashboard, press **CTRL+S**.
- Your **Panel 4 widget** should look like the one below:

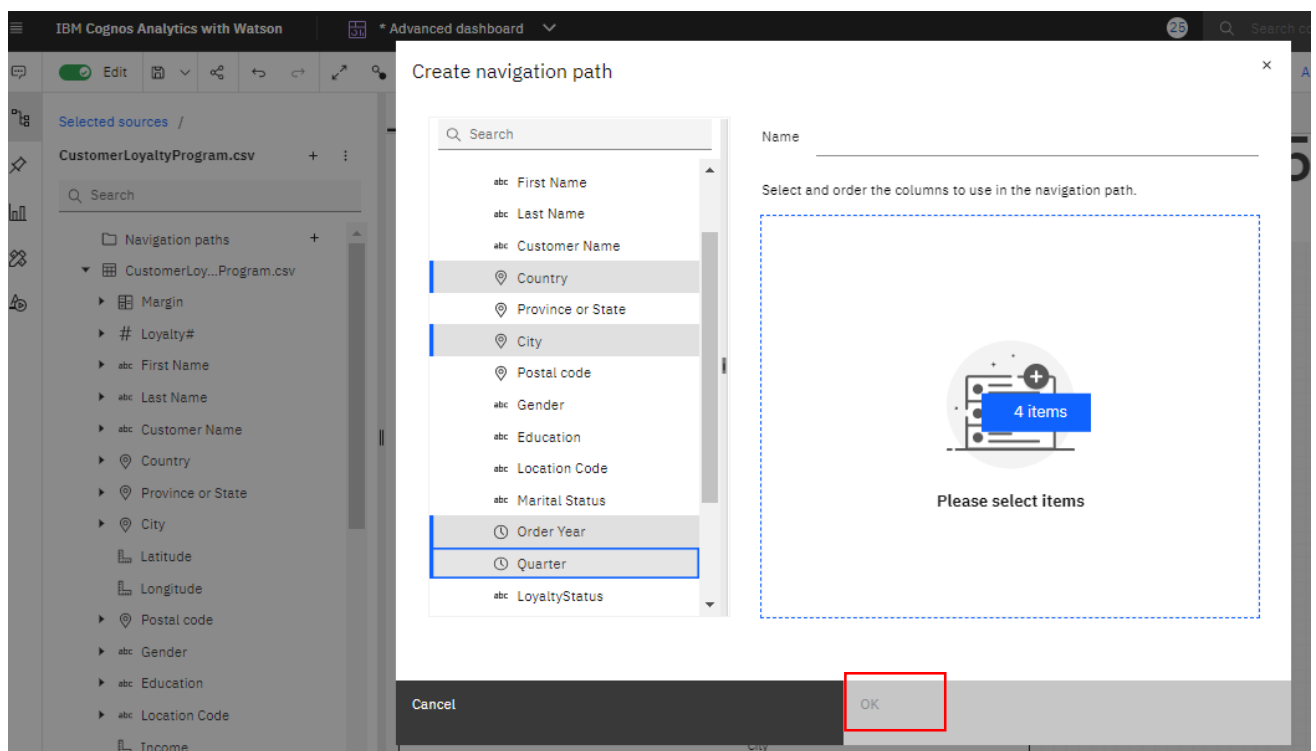


#### Task D: Create and Leverage Navigation Paths

1. Click on the **Create navigation path** of **Navigation paths** of the data source panel.

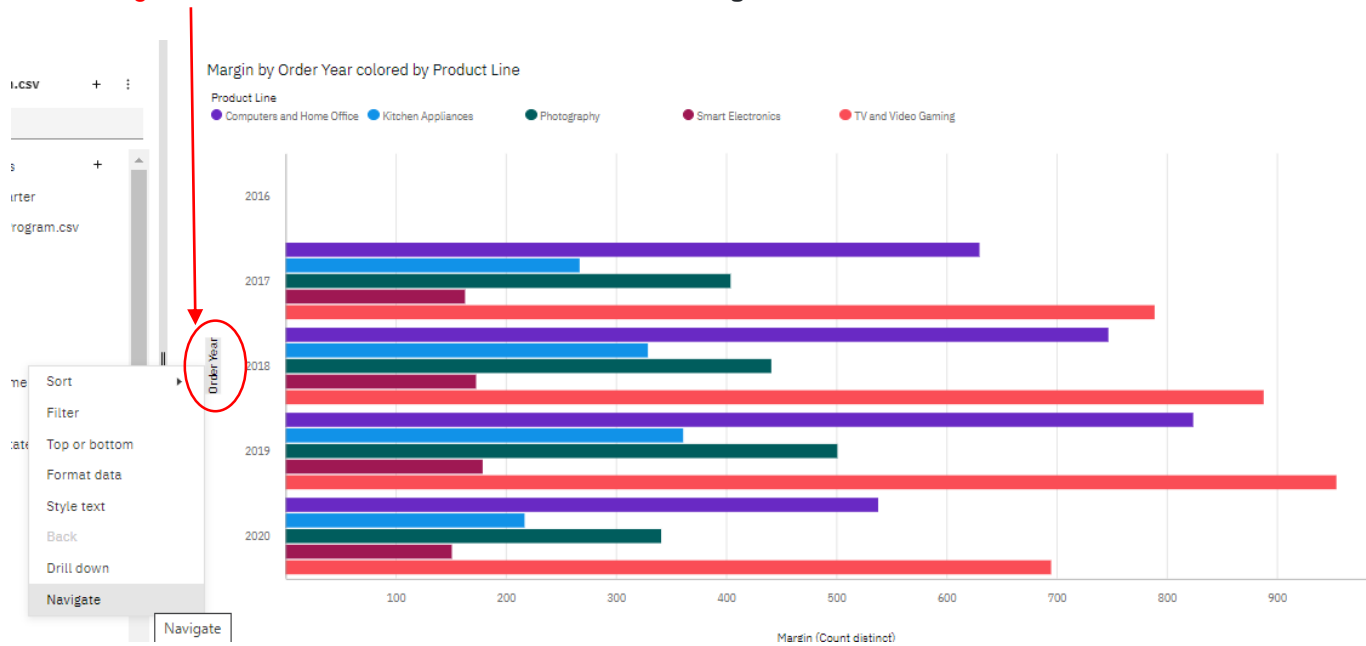


2. In the **Create navigation path** dialog box, expand **CustomerLoyaltyProgram.csv**, if needed. Select, drag and release **Order Year**, **Quarter**, **Country**, **City** sequentially, maintaining the order (shown on the image below) on the right panel. Once done, click **OK**.

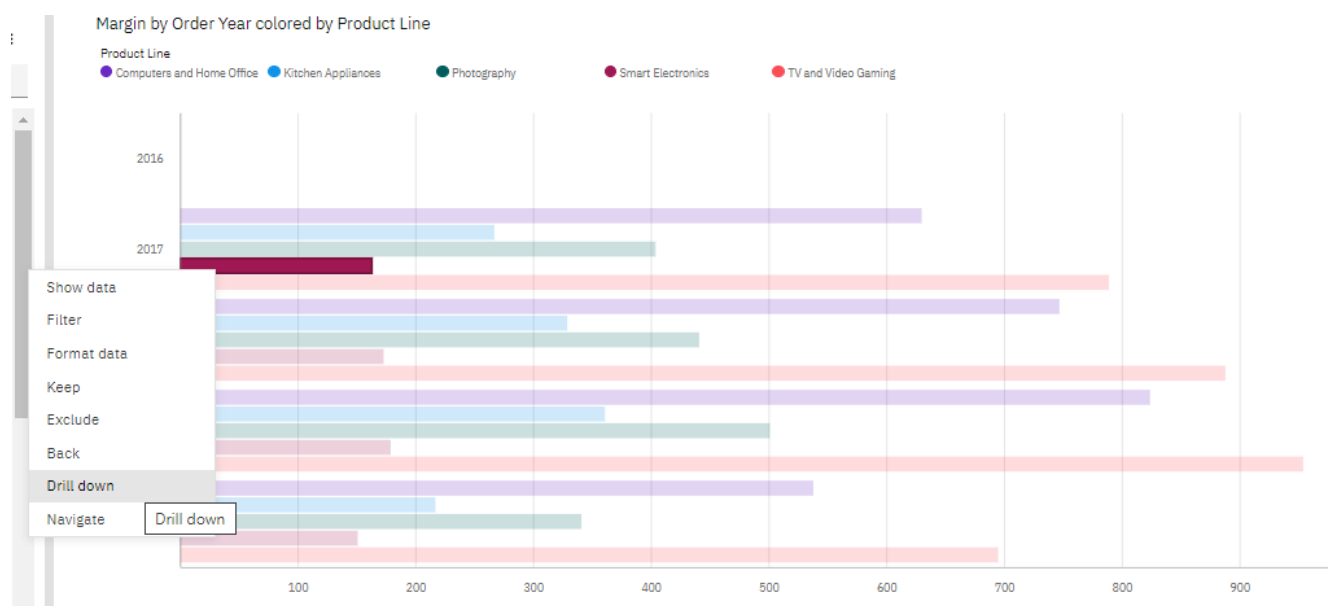


3. From the **Data Source** panel, press **CTRL** and select **Margin**, **Product Line**, **Order Year** and drag it to the center of **Panel 5**, releasing it once you see the **drop zone** turn blue.
4. Click on the **chart** in **panel 5** to bring it into focus and render the **on-demand toolbar**.
5. Click the **Change Visualization** button in the on-demand toolbar. Use the arrow **">"** to expand **Recommended visualizations**. Find and Select **Bar**.

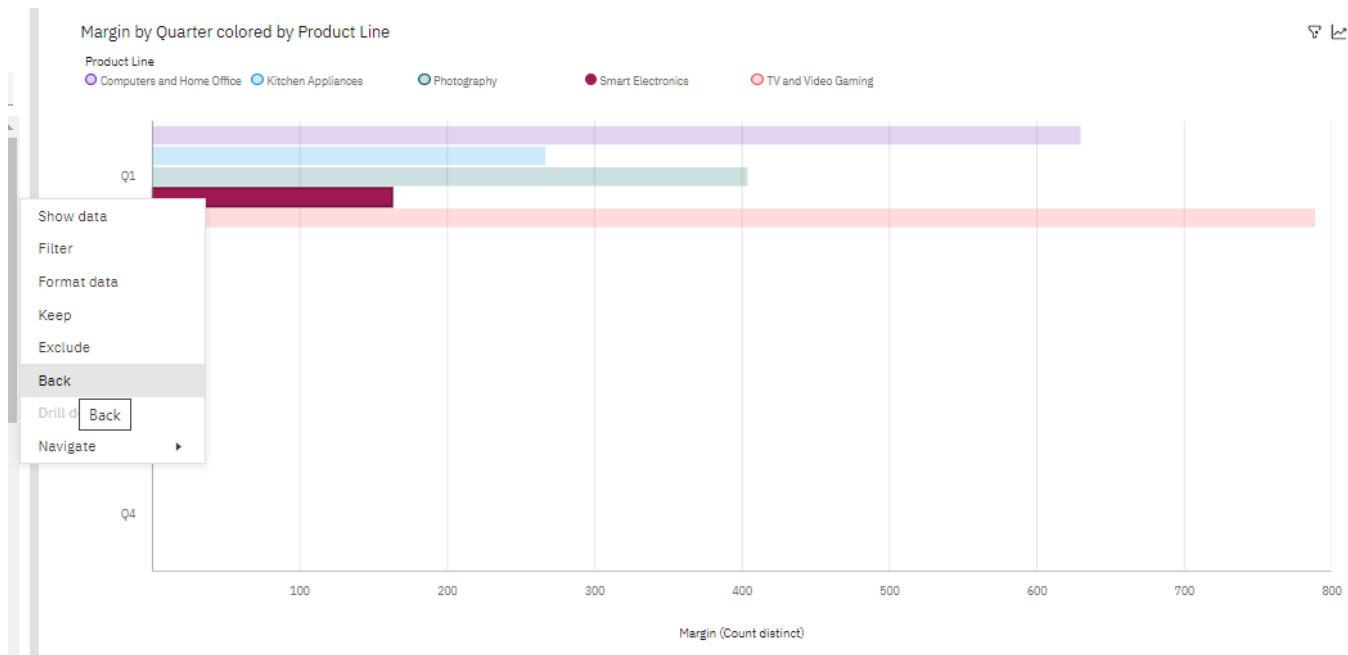
6. **Right-click** on the axis label **Order Year**. Select **Navigate**.



7. One by one select **Order Year**, **Quarter**, **Country**, **City** to navigate among the columns of the navigation paths and observe the resulting panel 5 visualization. Lastly, keep the **Order Year** selected.
8. [Alternative interactive way with Drill down/back:](#)
  - Click on the **chart in panel 5** to bring it into focus if needed.
  - Right-click on **2017 Smart Electronics** bar of the bar chart.
  - Select **Drill down**.

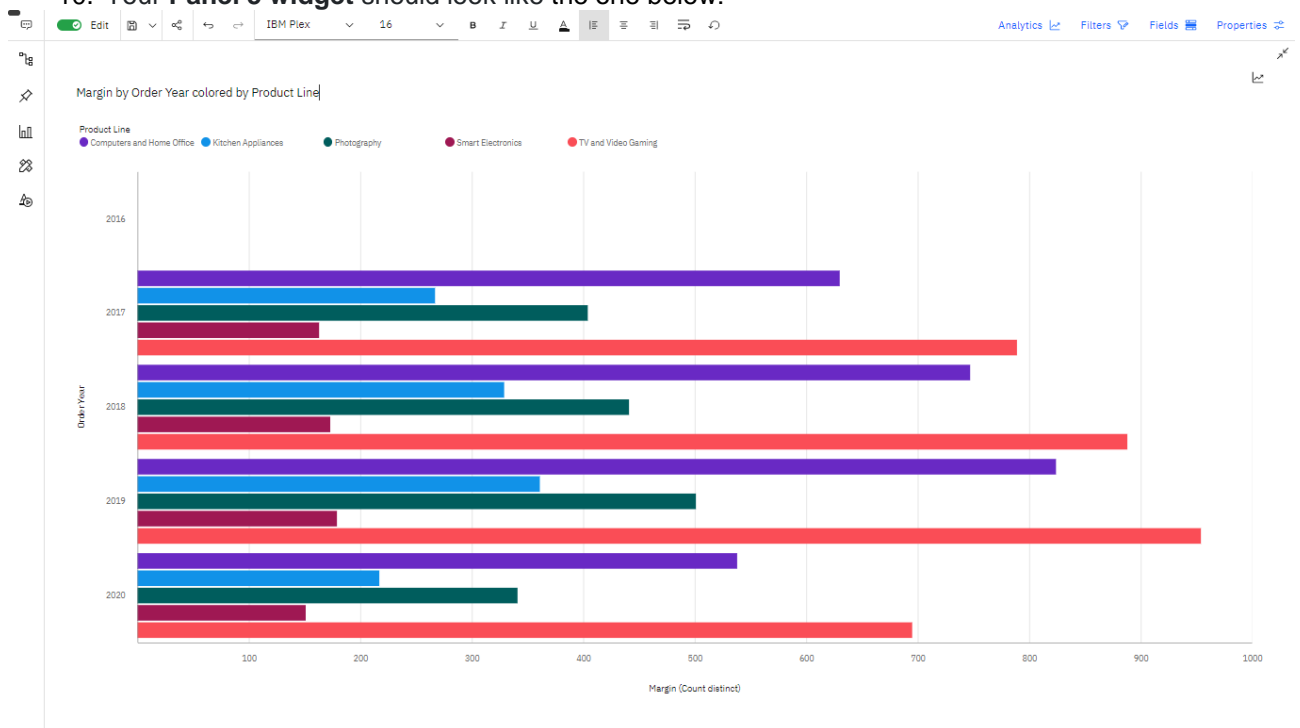


- Now right-click on **Q1 Smart Electronics** bar of the bar chart.
- Select **Drill back**



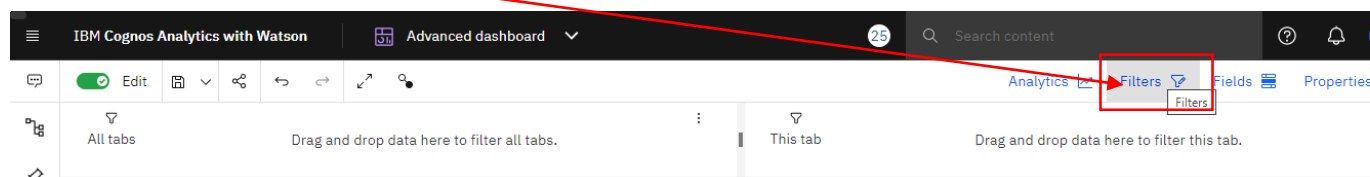
9. To save the current work in the dashboard, press **CTRL+S**.

10. Your **Panel 5 widget** should look like the one below:

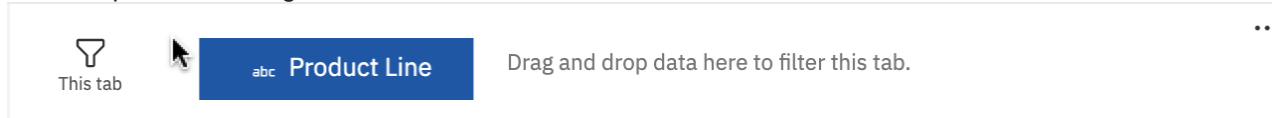


### Task E: Filter Data in the Current Tab

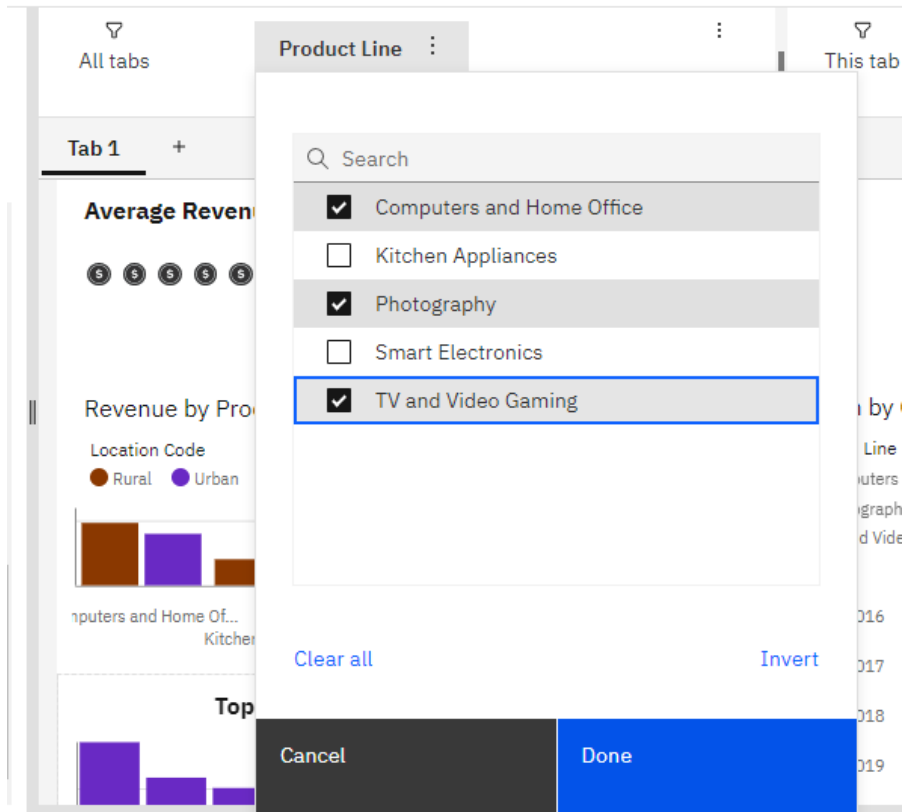
1. If required, click **Filters** in the **Dashboard Toolbar** to display the filters pane.



- From the **Data Source** panel, select **Product Line** and drag and release it on the **This tab** filter panel on the right-hand side.



- Click on the **Product Line** filter tab of **This tab** filter panel. Select **Computers and Home Office, Photography, TV and Video Gaming**. Click **OK**.



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

Finally, your dashboard should look like below:

