



Hands-on Lab: Getting Started with Cognos Analytics

Estimated time needed: 40 minutes

Purpose of the Lab:

This lab is designed to introduce learners to IBM Cognos Analytics, an AI-fueled business intelligence platform. The primary objective is to guide you through the process of setting up a trial account, navigating the user interface, uploading external data, and creating a dashboard. The lab aims to familiarize you with the key functionalities of Cognos Analytics, including data discovery, dashboard creation, and visualization. It is structured to offer practical experience in integrating and visualizing data, which is fundamental for data-driven decision-making and business intelligence.

Benefits of Learning the Lab:

By completing this lab, you will gain practical skills in using a leading business intelligence tool, enhancing their ability to analyze and visualize data effectively. The knowledge gained from this lab is particularly beneficial for individuals looking to improve their competencies in data analytics, dashboard creation, and data-driven storytelling. Mastery of these skills is crucial for professionals in data analysis, business intelligence, and related fields, as it enables them to derive insights from data and present them in a visually appealing and easy-to-understand format. This lab provides a stepping stone for those aspiring to become proficient in modern data analytics tools and techniques.

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 90 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. 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:

- Sign up for a Cognos Analytics trial plan
- Navigate around the Cognos Analytics user interface
- Upload external data files to the Cognos Analytics platform
- Start a new dashboard with dashboard templates
- Create a simple dashboard

Exercise 1: Sign up for Cognos Analytics Trial Plan

In this exercise, you will learn how to sign up for an IBM Cognos Analytics trial plan.

1. Go to [Try IBM Cognos Analytics](#).

Note: If you use your **existing cloud account**, you will get only 30 days trial for Cognos Analytics.

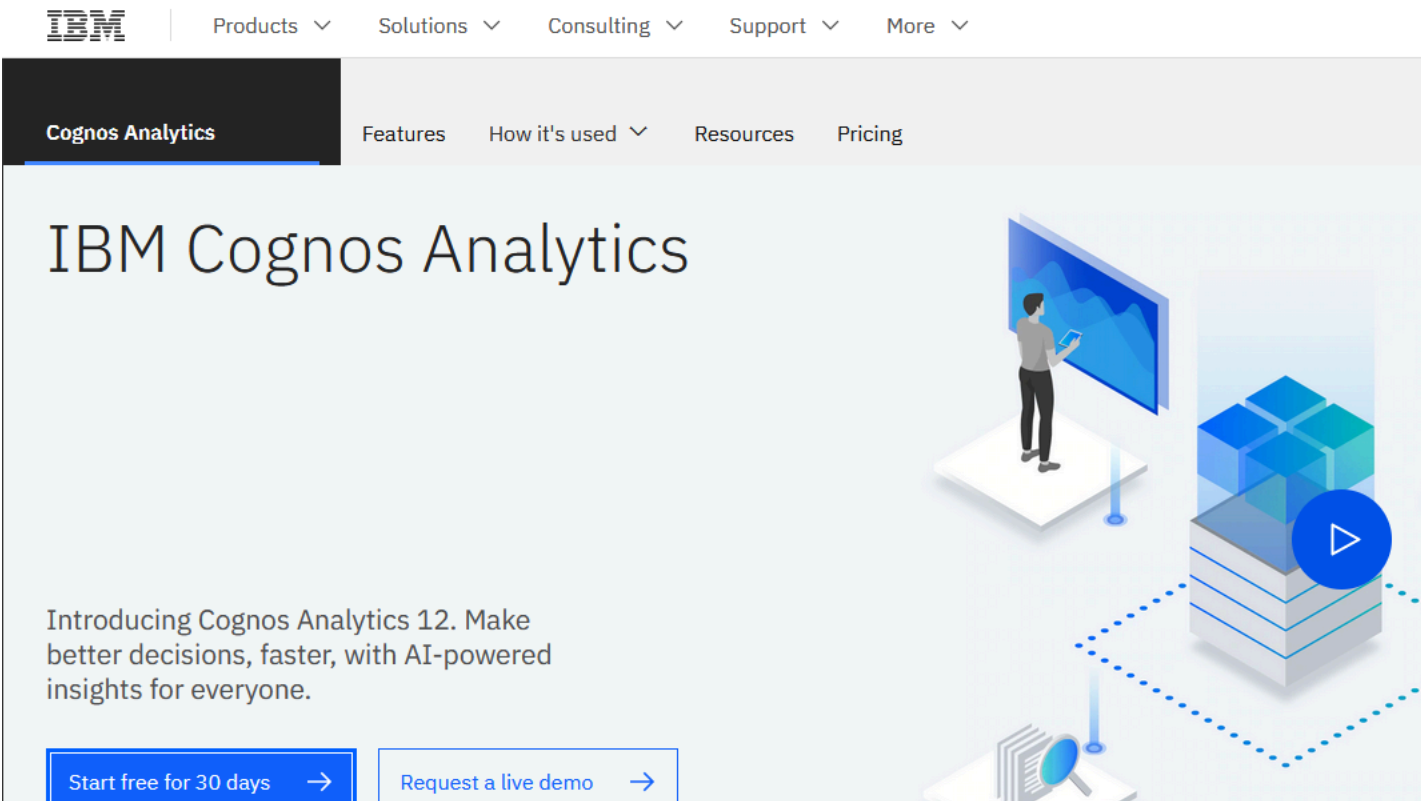
2. Fill out section **1. Account information** with your information and click **Next**. The email address you are going to use here will be called IBMid.



On-line training - Data Visualizations - Trial

Learn the skills necessary to become a data analyst using Cognos Analytics. By registering for the IBM Data and Analyst Certificate, you have the opportunity to use the full suite of its capabilities for 90 days while you complete your course. Cognos helps you to understand your data and easily create compelling visualizations and reports.

- If you already have an IBMid, click **Log in**. Enter your IBMid and password.
[Click here](#) to start your free trial for Cognos Analytics and fill required information and press **Continue** at the bottom of the page.



3. Fill out section **2. Additional information** with your information. In the case of the Data Center, select one which is nearest to your location. Then click **Next**.


2. Additional information

Are you a student? (optional)

☒ Yes ☐ No

Select Data Center (optional)

US East (Washington DC) ▾

Next 

4. Now enter the 7 digit code you received on your email address and click **Create account**.

3. Verify email

We emailed a 7 digit code to
[redacted]@gmail.com

This code will expire in 30 minutes.

Verification token

5734728

Didn't receive the email? Check your spam filter for an email from ibmacct@iam.ibm.com.

[Resend code](#)

IBM may use my contact data to keep me informed of products, services and offerings:

☒ by email

You can withdraw your marketing consent at any time by submitting an [opt-out request](#). Also you may unsubscribe from receiving marketing emails by clicking the unsubscribe link in each email.

More information on our processing can be found in the [IBM Privacy Statement](#). By submitting this form, I acknowledge that I have read and understand the IBM Privacy Statement.

I accept the product [Terms and Conditions](#) of this registration form.

Create account 

5. Click **Proceed**.

About your IBMid Account Privacy

This notice provides information about accessing your IBMid user account (Account ID). If you have previously been presented with a version of this notice, please refer to “Changes since the previous version of this notice” below for information about the updates.

Updates to the [IBM Privacy Statement](#) since this notice was originally published provide additional information about how your personal information is processed by IBM.

Changes since the previous version of this notice

What data does IBM collect?

Why IBM needs your data

How your data was obtained

How IBM uses your data

How IBM protects your data

How long we keep your data

Your rights

I acknowledge that I understand how IBM is using my Basic Personal Data and I am

Cancel

Proceed

6. You are now done with the sign up procedure. You will be redirected to [myibm.ibm.com/dashboard/](#) automatically. Wait for a few moments until the Coursera on-line training - Data Visualizations trial offering becomes active.

Trials

1 Offering




Coursera on-line training - Data Visualizations

Activation in progress

[View support information](#)

7. Click the **Launch** button for this offering.



IBM Cognos Analytics on Cloud - Trial

Active
Expires on Aug 25, 2023

Launch

Manage

If it has been more than 72 hours since you initiated your Cognos Trial activation, but it's still showing *Activation in Progress*, please let us know on the [forum](#) so we can follow up with the Cognos team on your behalf.

NOTE: The trial will not be activated for learners in countries under US sanctions.

8. You have successfully launched the Cognos Analytics platform, it will look as below.

☰

IBM Cognos Analytics

💬

Ask a question

→

Introduction to Cognos Analytics

Leverage self-service analytics to make more confident decisions.

Get started

Watch video

📁

Upload data and start creating content

Upload spreadsheets, CSV files, and other types of files, and create content based on these files.

📁

Create content from existing data

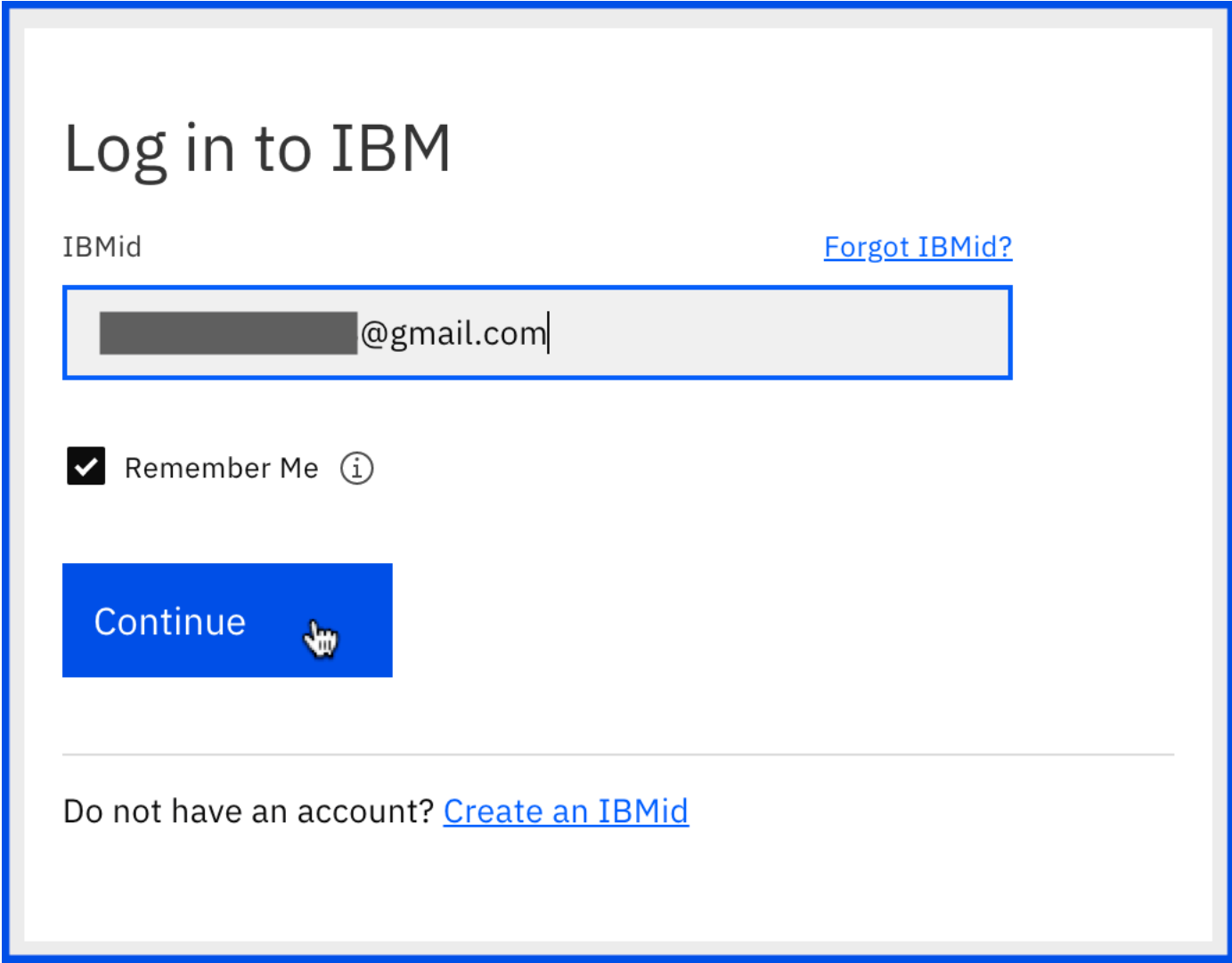
Locate data sources in the Content view, and create content on these sources.

Recent

9. From now on, if you want to sign in to the Cognos Analytics platform with your IBMid, go to [myibm.ibm.com](#). Enter your IBMid and password and then repeat steps 7 and 8.

about:blank

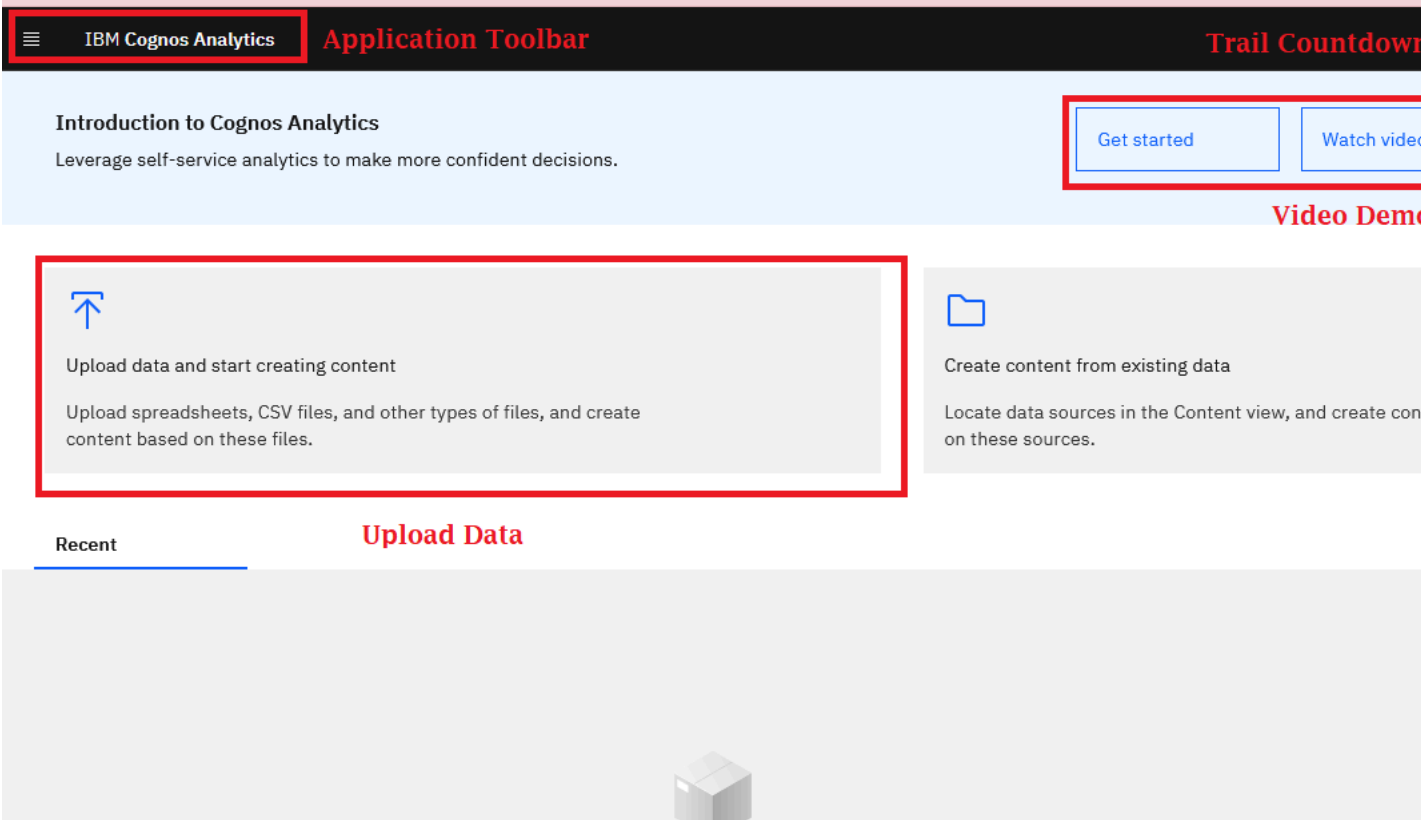
7/22



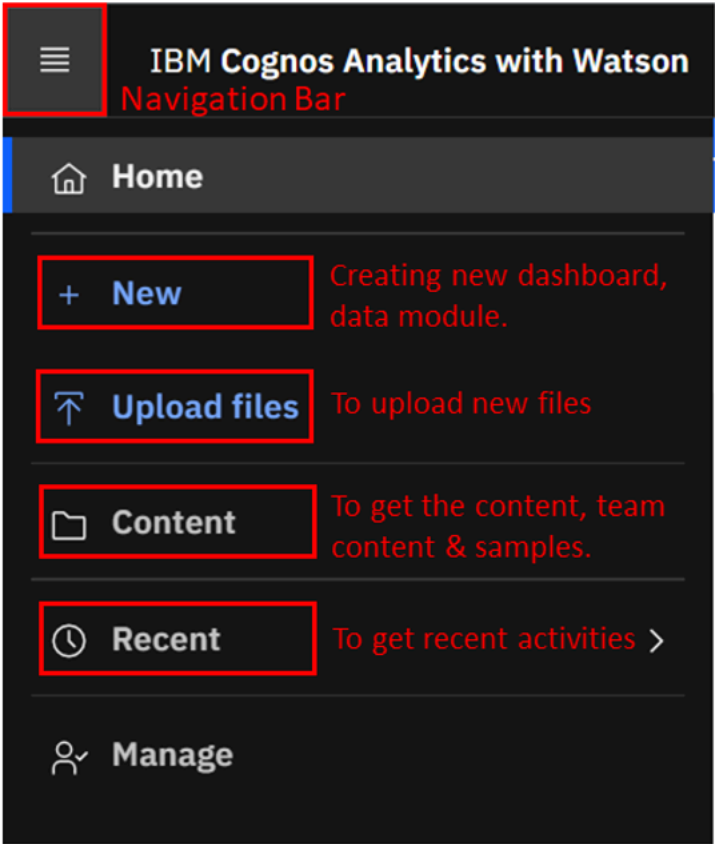
Exercise 2: Navigate around the Cognos Analytics UI

In this exercise, you will learn general navigation around the Cognos Analytics user interface (UI).

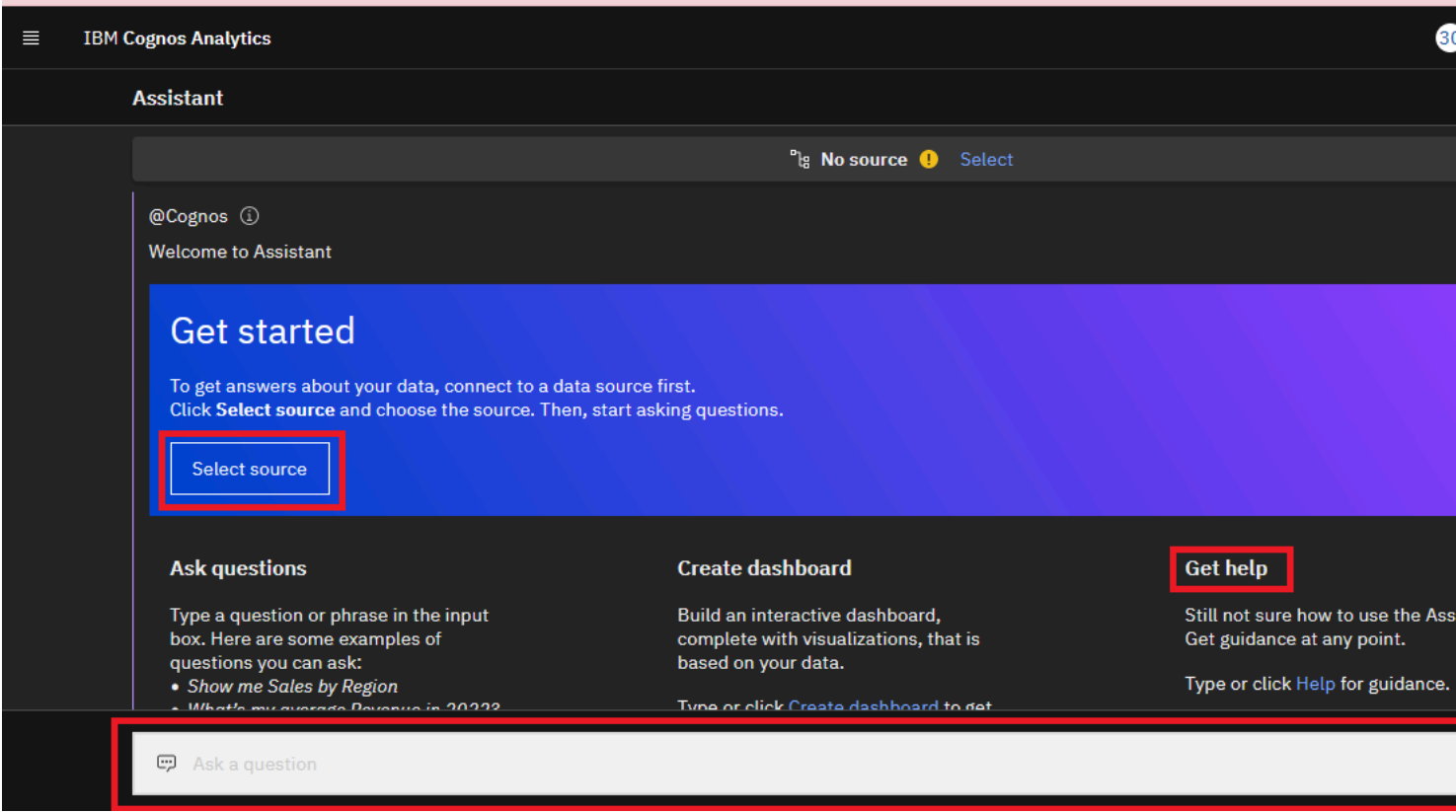
1. The goal of the Cognos Analytics UI is to provide you with a streamlined way to get started using Cognos Analytics and view content and activities pertinent to them. You will begin your general navigation here.



2. Click the **Navigation Bar**, you can use **New** to create new items, you can use **Upload data** to upload your external data files, the **Content** section is where you can create new content or open different samples to work with, and the **Recent** section shows any recently used files you've worked on.



- 3. Once you begin working with content, the menu will update with your recently used items. In your Cognos Analytics instance, you may see recent content on the canvas.
- 4. You can always use the **Assistant** icon in the top right of the page to find insights from your data once data is uploaded.




Exercise 3: Create a Simple Dashboard with Cognos Analytics

In this exercise, you will learn how to upload external data files to Cognos Analytics, and then learn how to start a new dashboard with templates. Lastly, you will learn how to create a simple dashboard.

Task A: Upload External Data Files

In this task, you will learn how to upload external data files to Cognos Analytics.

- 1. Download the file [CustomerLoyaltyProgram.csv](#).
- 2. If you are not currently signed in, sign in to the Cognos Analytics platform with your IBMid, by navigating to [myibm.ibm.com/dashboard/](#).
- 3. Enter your IBMid and password, then scroll down and click **Launch**.



IBM Cognos Analytics on Cloud - Trial

Active
Expires on Aug 25, 2023

Launch

Manage

4. To upload a file, click the **Upload data and start creating content** link.

IBM Cognos Analytics


Ask a question

Introduction to Cognos Analytics

Leverage self-service analytics to make more confident decisions.


Get started

Watch video



Upload data and start creating content

Upload spreadsheets, CSV files, and other types of files, and create content based on these files.



Create content from existing data

Locate data sources in the Content view, and create content based on these sources.

5. Click on **Drag and drop file here or click to upload**, a updated new file browser window will open. Navigate to where the file is saved, select the file, and click **Open**.

IBM Cognos Analytics

Upload data and start creating content

You can upload supported file types that are stored in any location to which your computer has local or LAN access.

Drag and drop file here or click to upload

Want to know more about uploading data? [Learn more](#)

Cancel

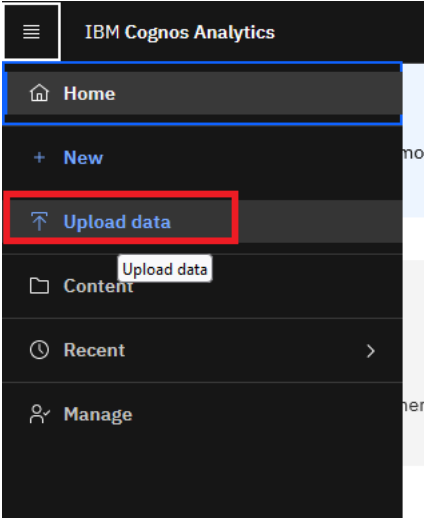
Back

Next

6. Alternatively, from the menu, click **Upload data**.

about:blank

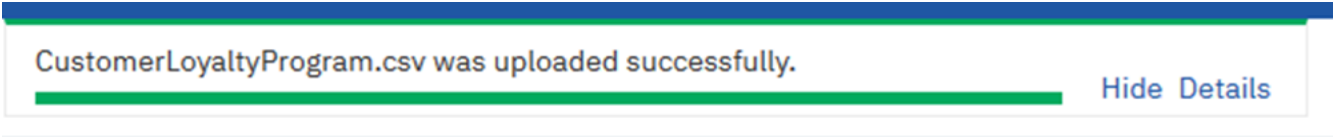
10/22



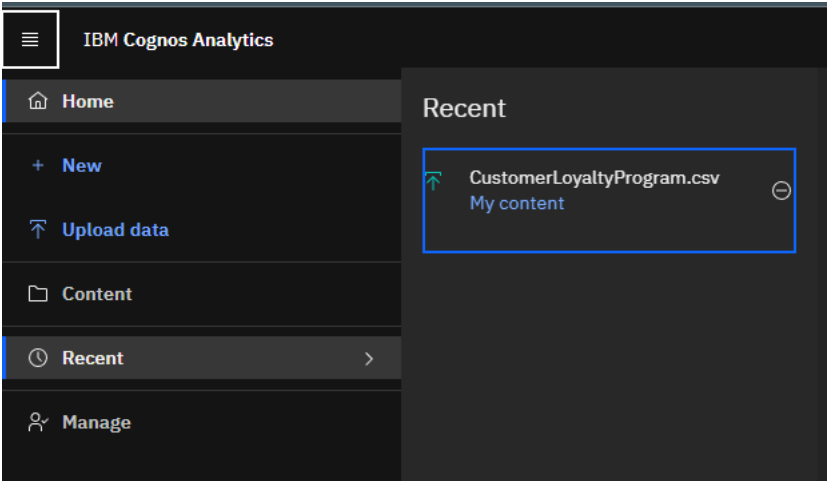
7. As the file uploads, notice that a series of status bars will be visible as the upload process reads and analyzes the data being brought in.



8. Once it completes, the status bar will update to show the successful completion before closing.



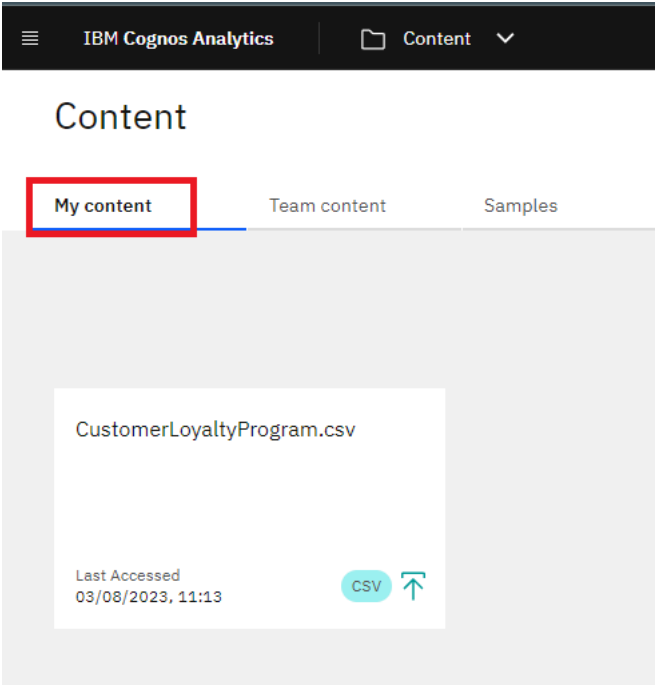
9. In the **Recent** section, you will see the new uploaded data file.



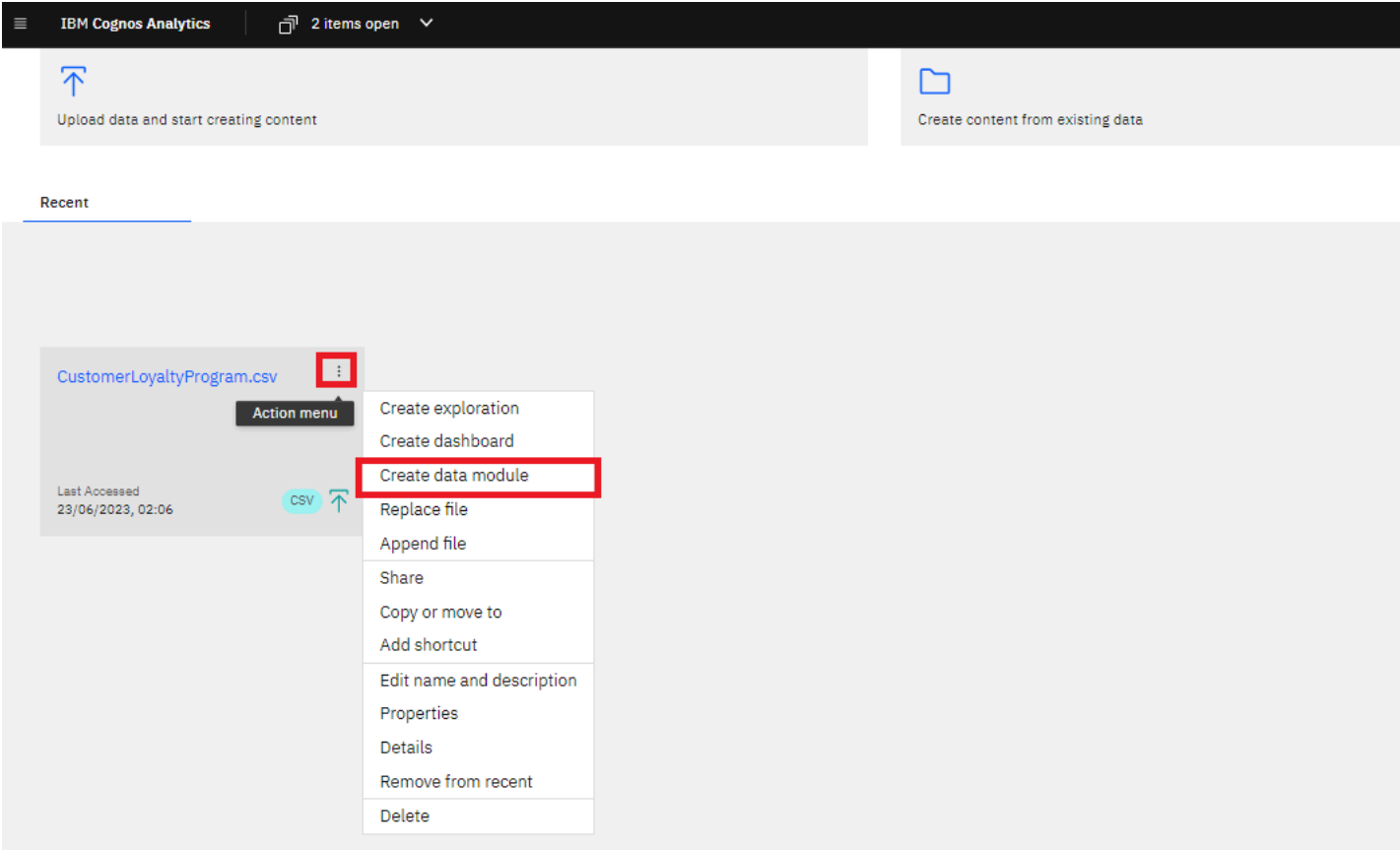
Task B: Convert the uploaded CSV file into Data Module and view the table on IBM Cognos.

In this task, you will learn how to view the dataset on IBM Cognos.

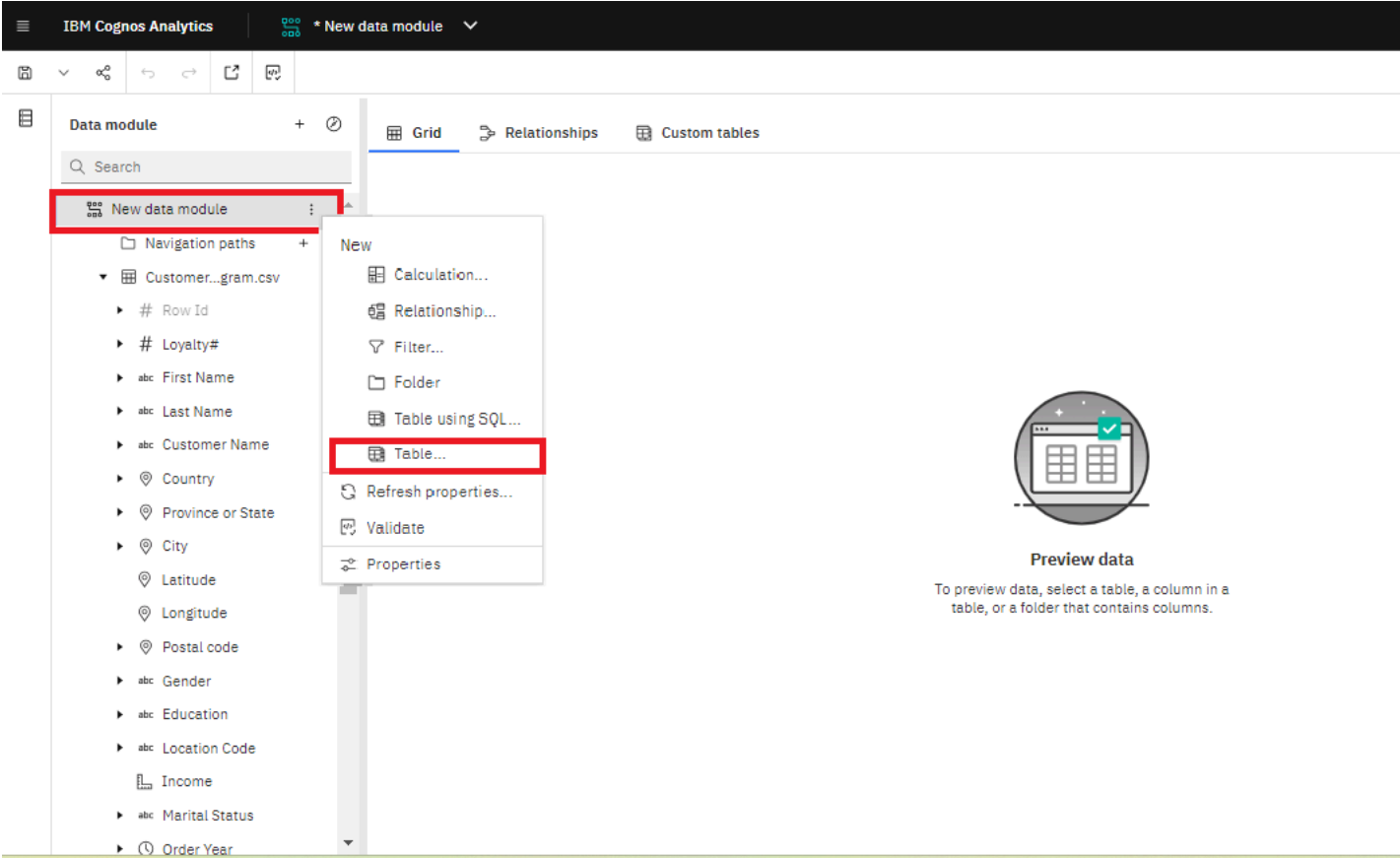
1. In the menu, click **Content**, then select the **My content** tab.



2. Click the **Action Menu** (represented by three dots) to the right of the *CustomerLoyaltyProgram.csv* file, and then click **Create data module**.



3. Click the **Action Menu** (represented by three dots) to the right of **New data Module**, and click the **Table** option to launch the **Create table** window.



4. Click **Select tables**, select the checkbox for the uploaded dataset **CustomerLoyaltyProgram.csv**, and then click the **Next** button to proceed with the creation of the table.

Create a view of a table

New table name: CustomerLoyaltyProgram.csv - View (1)

Select items

Find

CustomerL...ogram.csv

Invert

Clear all

Row Id	Loyalty#	First Name	Last Name	Customer Name	Country
1	837810	Abigail	Goris	Abigail Goris	Canada
2	707928	Ada	Glaude	Ada Glaude	Germany
3	901442	Ada	Staback	Ada Staback	Canada
4	237303	Adam	Boner	Adam Boner	Canada
5	348835	Adam	Dunnegan	Adam Dunnegan	Canada
6	186842	Adelaide	Drago	Adelaide Drago	Germany
7	605640	Adell	Maroni	Adell Maroni	United Kingdom
8	723924	Adolph	Prey	Adolph Prey	Germany
9	202299	Adria	Osterstuck	Adria Osterstuck	Canada
10	826271	Adriane	Dottin	Adriane Dottin	Canada
11	616030	Akilah	Carvalho	Akilah Carvalho	Germany
12	747903	Al	Johson	Al Johson	United States

(29) columns selected.

Previous

Cancel

Finish

7. The new table view will be added in the source panel. Save this data module by clicking **Save**.

IBM Cognos Analytics

New data module

Save

Data module

Search

CustomerL...View (1)

Customer...gram.csv

Row Id

Loyalty#

abc First Name

abc Last Name

abc Customer Name

Country

Province or State

City

Latitude

Longitude

Postal code

abc Gender

abc Education

abc Location Code

Income

abc Marital Status

Order Year

Quarter

Grid

Relationships

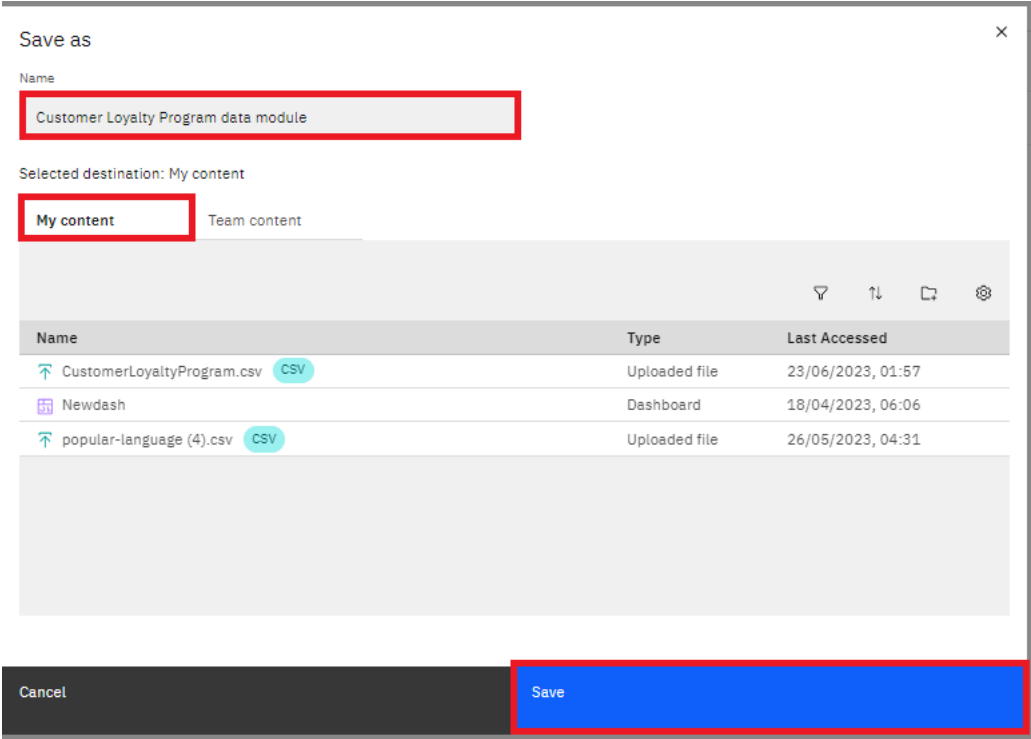
Custom tables

CustomerLoyaltyProgram.csv - View (1)

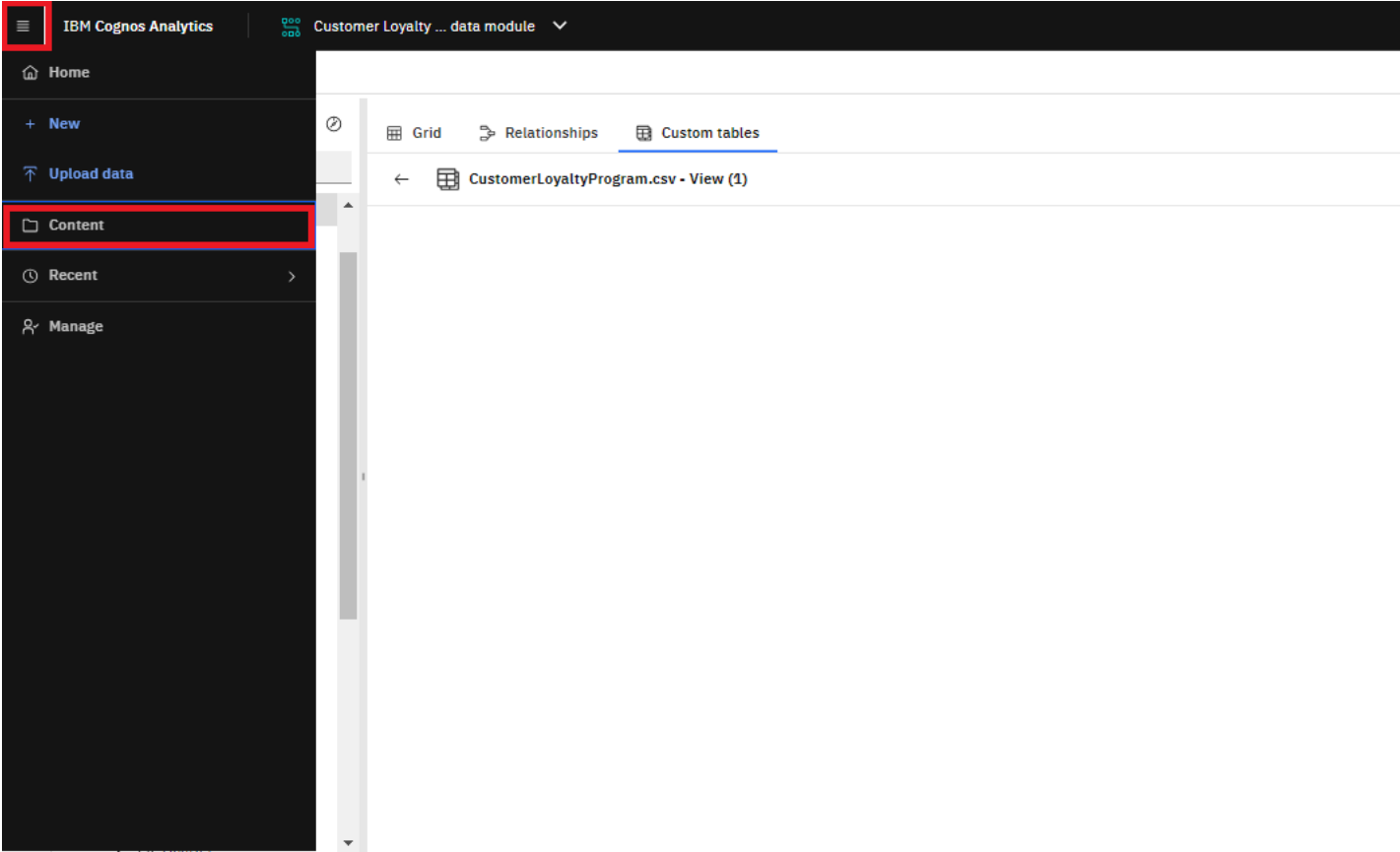
CustomerL...ogram.csv

CustomerLo...- View (1)

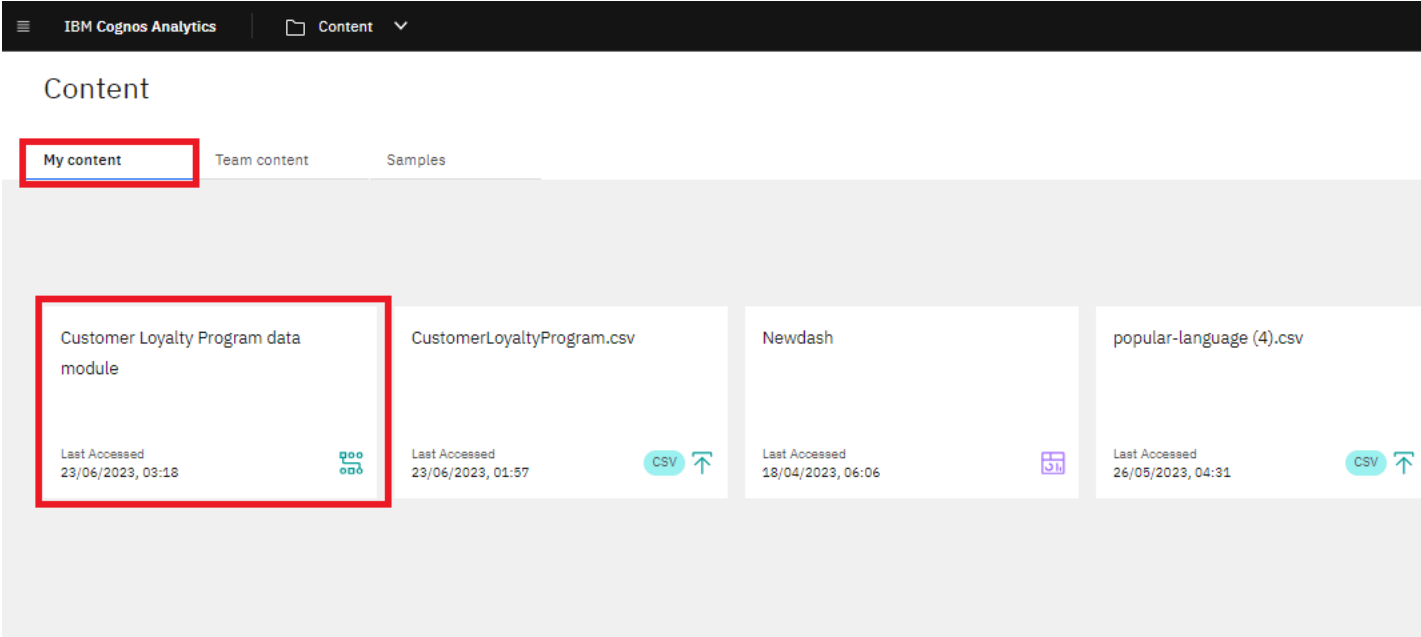
8. In the **Save as** window, enter the name **Customer Loyalty Program data module**, select the **My content** tab as the destination, and click **Save** to proceed.



9. Next, in the IBM Cognos Analytics main menu, select **Content**.



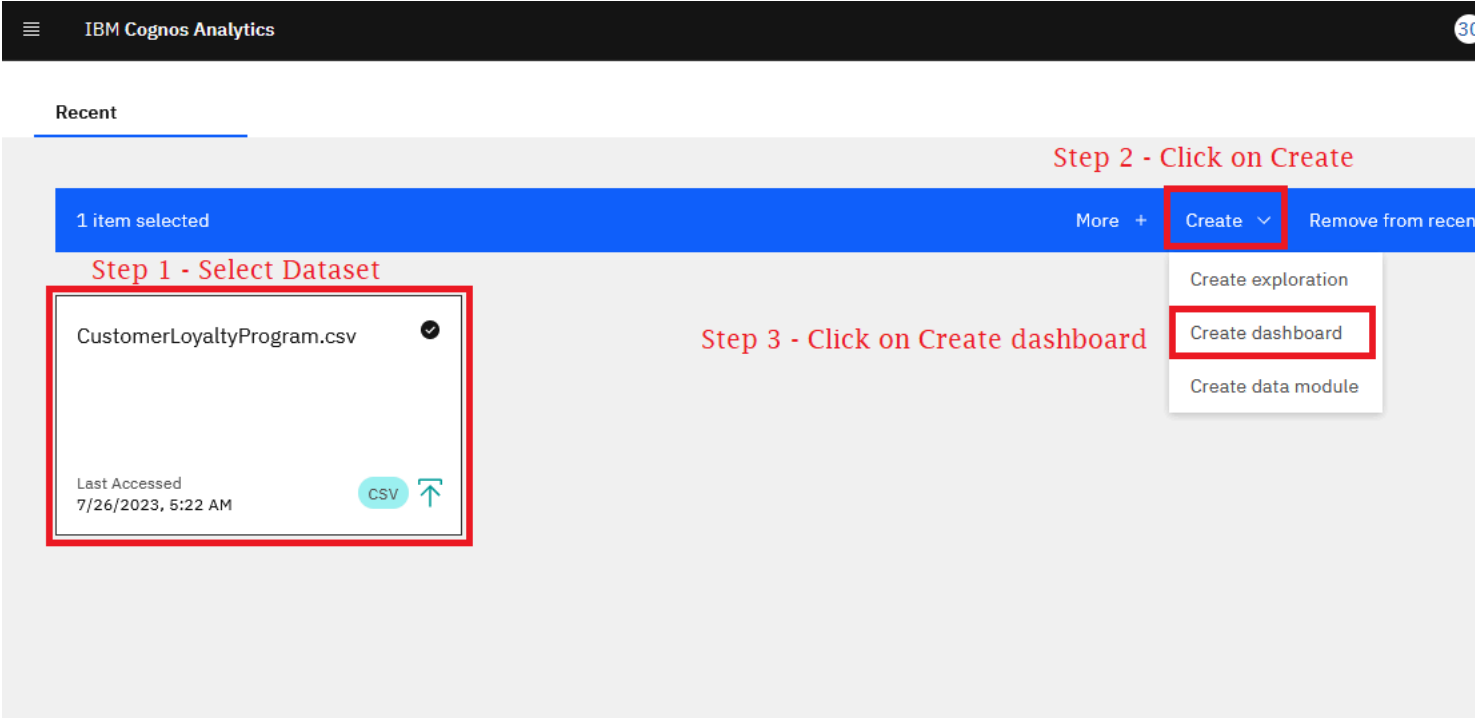
10. You will now see the new **Customer Loyalty Program data module** under the **My Content** tab.



Task C: Start a New Dashboard with Templates

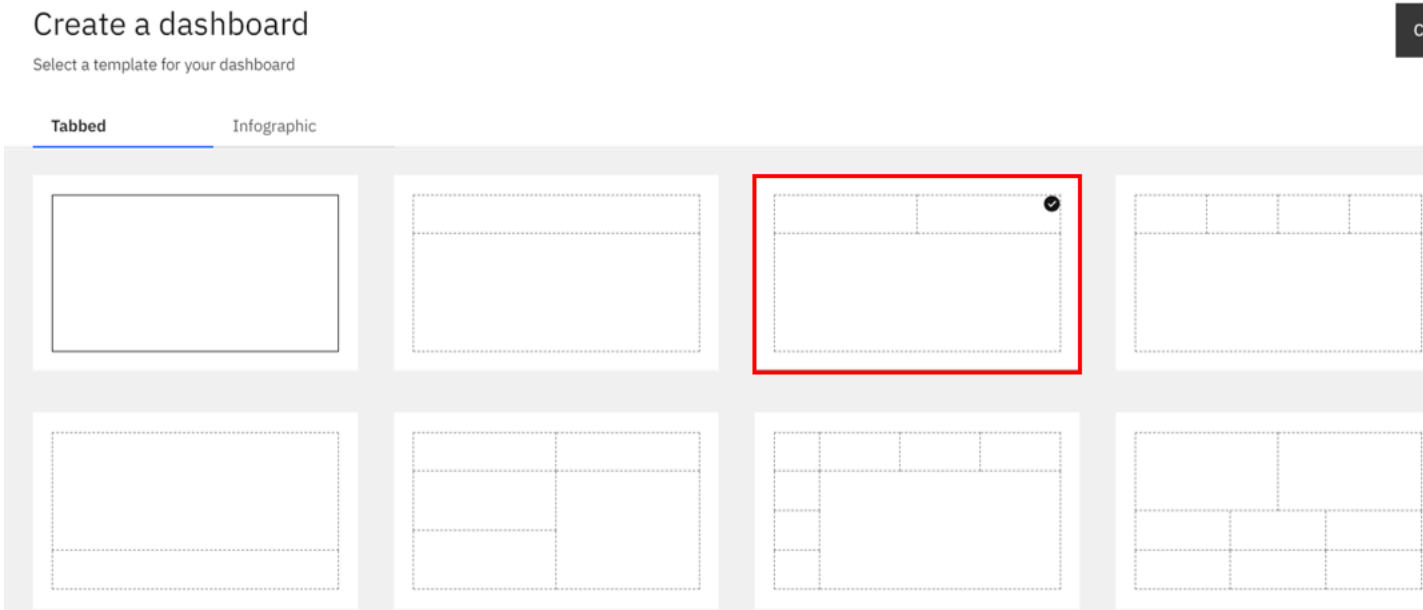
In this task, you will learn how to start a new dashboard with templates.

1. In the IBM Cognos Analytics main menu, click **Recent**, select the uploaded data file **CustomerLoyaltyProgram.csv**.
2. In the blue menu bar, click **Create** and then click **Create dashboard**.

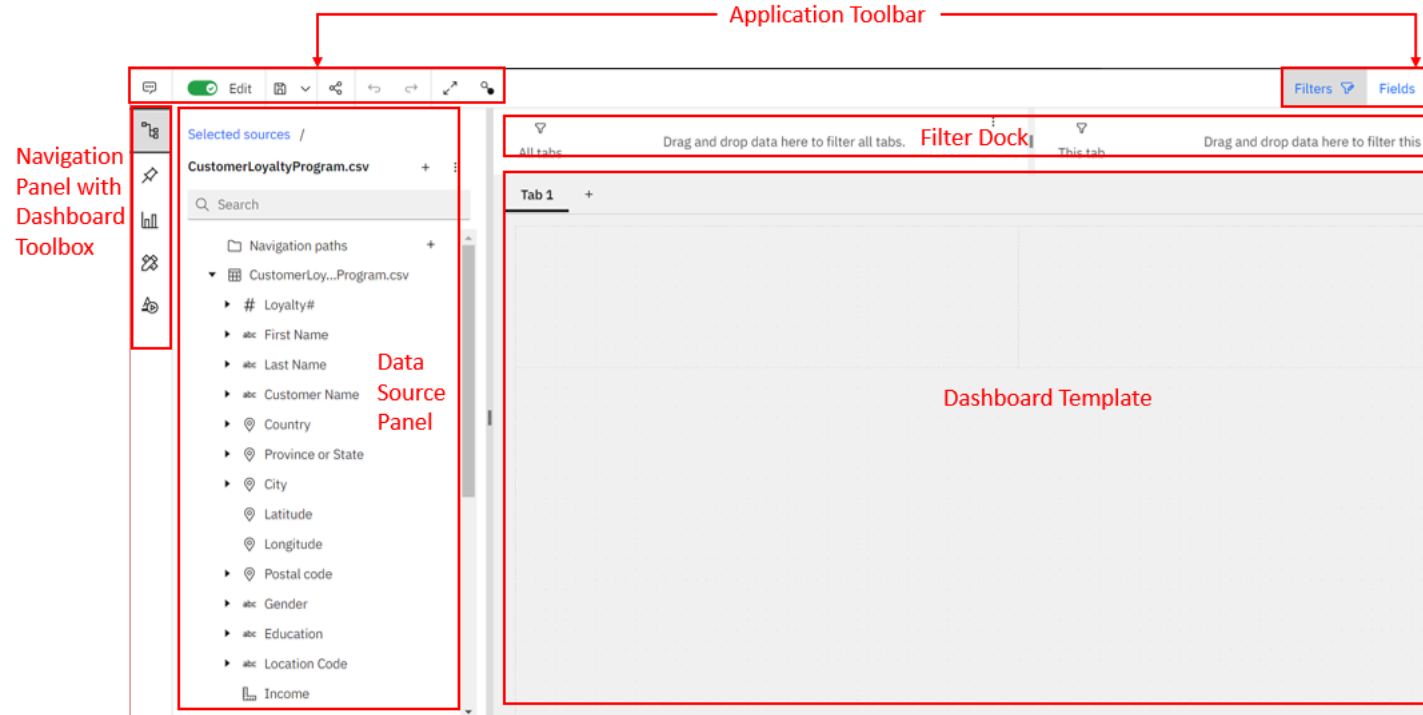


The *Create a dashboard* window will display, allowing you to select the type of dashboard and the template style.

3. Select the **Tabbed** dashboard style. This will allow you to have multiple pages for your dashboards.
4. Select the *three-panel template*, which should be the third one displayed, and then click **Create**.



5. Now, you have created a new dashboard using a dashboard template.



6. To save the newly created dashboard, click the **Save** icon in the toolbar or press **CTRL+S**.
7. Select **My content** as the destination. In the **Name** field, enter *Simple dashboard*, and click **Save**.

Save as

×

Name

Simple dashboard

Selected destination: My content

My content

Team content

Filter

Sort

Share

Settings

Name	Type	Last Accessed
Customer Loyalty Program data module	Data module	03/08/2023, 11:53
CustomerLoyaltyProgram.csv CSV	Uploaded file	03/08/2023, 11:13

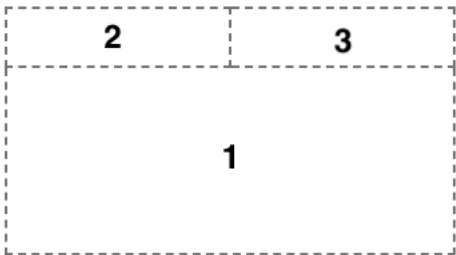
Cancel

Save

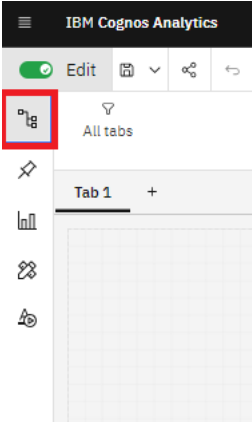
Task D: Create a Simple Dashboard

In this task, you will learn how to create a simple dashboard with Cognos Analytics.

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



- 2. 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*.



- 3. From the data source panel, press the **CTRL** key and select **Order Year**, **Quantity Sold**, and **Product Line**, and drag them to the center of **Panel 1**, releasing them once you see the drop zone square turn blue.

Q Search

Navigation paths

CustomerLoyaltyProgram.csv

> # Loyalty#

> abc First Name

> abc Last Name

> abc Customer Name

> Country

> Province or State

> City

Latitude

Longitude

> Postal code

> abc Gender

> abc Education

> abc Location Code

Income

> abc Marital Status

> Order Year

> Quarter

MonthsAsMember

> abc LoyaltyStatus

> abc Product Line

> abc Coupon Response

Count

Quantity Sold

Unit Sale Price

Unit Cost

Revenue

Customer Lifetime Value

Loyalty Count

All tabs

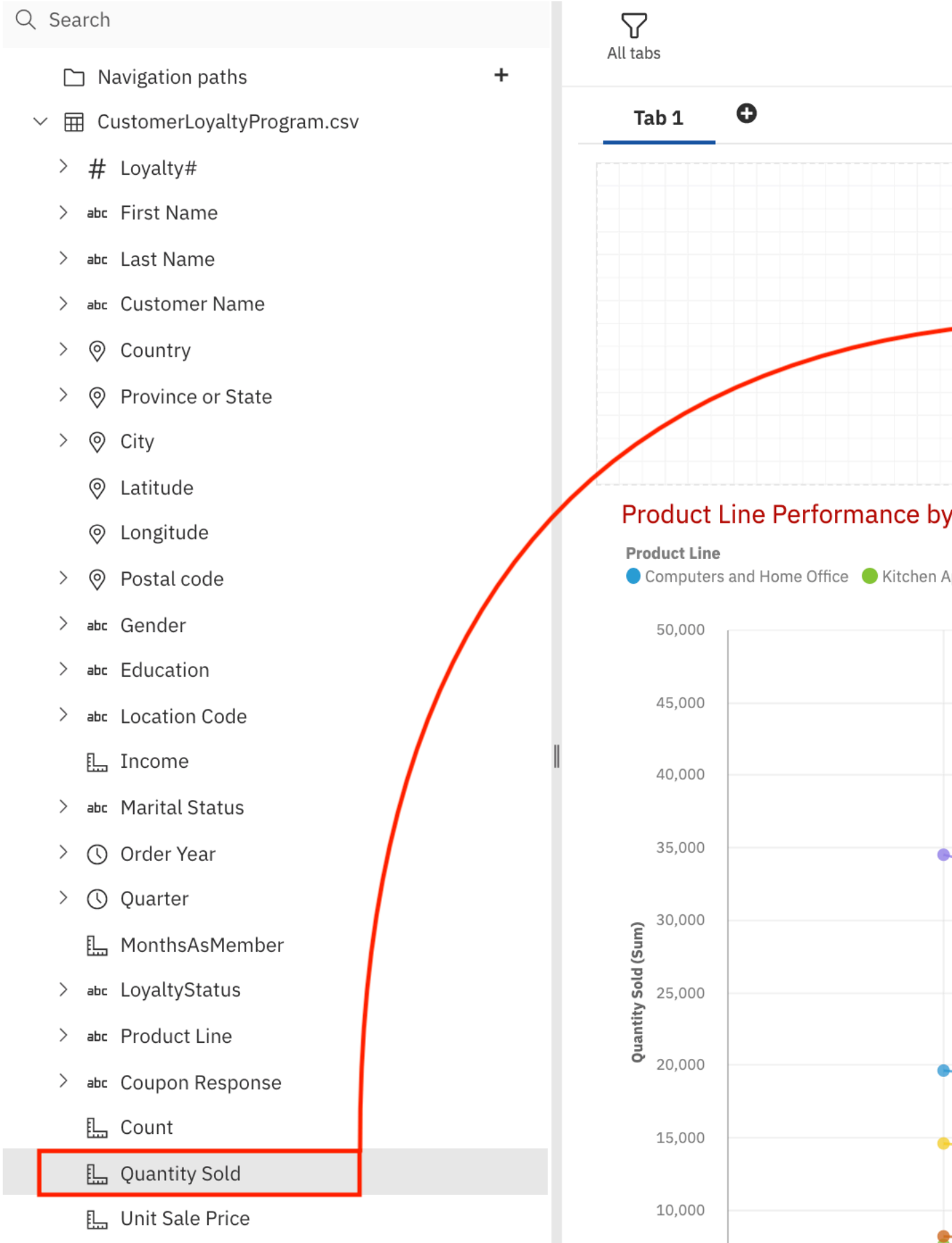
Tab 1

4. Click the line chart in **Panel 1** to bring it into focus and open the on-demand toolbar, which will be added to the main toolbar.

5. In the line chart visualization, select the title text and change it to *Product Line Performance by Year*.

about:blank

18/22



9. From the data source panel, select **Revenue** and drag it to the center of **Panel 3**, releasing it once you see the drop zone square turn blue.

Search

Navigation paths

CustomerLoyaltyProgram.csv

- > # Loyalty#
- > abc First Name
- > abc Last Name
- > abc Customer Name
- > 📍 Country
- > 📍 Province or State
- > 📍 City
- 📍 Latitude
- 📍 Longitude
- > 📍 Postal code
- > abc Gender
- > abc Education
- > abc Location Code
- 📊 Income
- > abc Marital Status
- > 🕒 Order Year
- > 🕒 Quarter
- 📊 MonthsAsMember
- > abc LoyaltyStatus
- > abc Product Line
- > abc Coupon Response
- 📊 Count
- 📊 Quantity Sold
- 📊 Unit Sale Price
- 📊 Unit Cost
- Revenue
- 📊 Customer Lifetime Value



All tabs

Tab 1

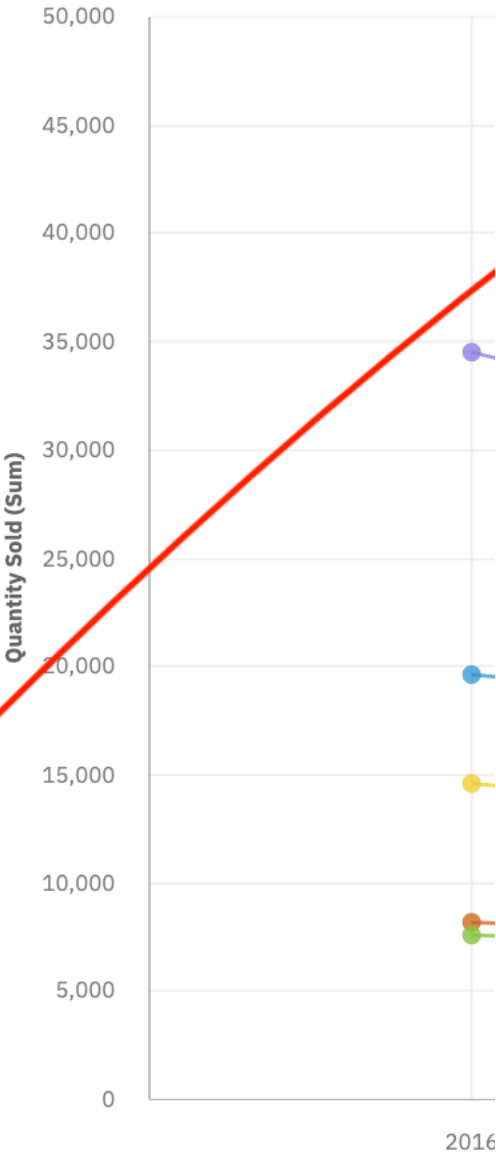


Quantity Sold

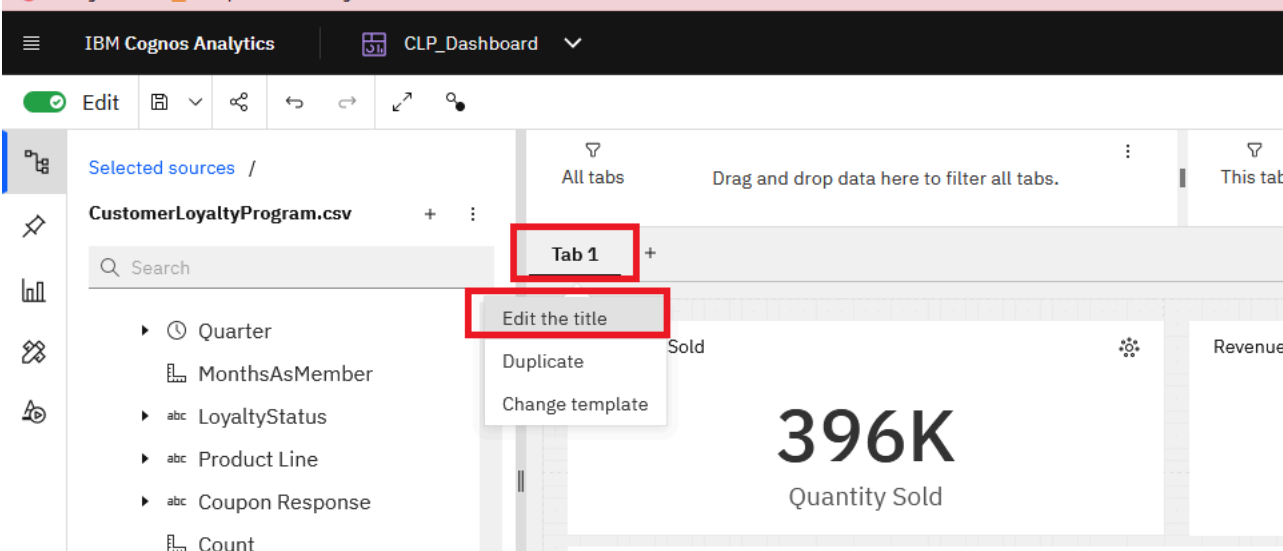
Product Line Performance by

Product Line

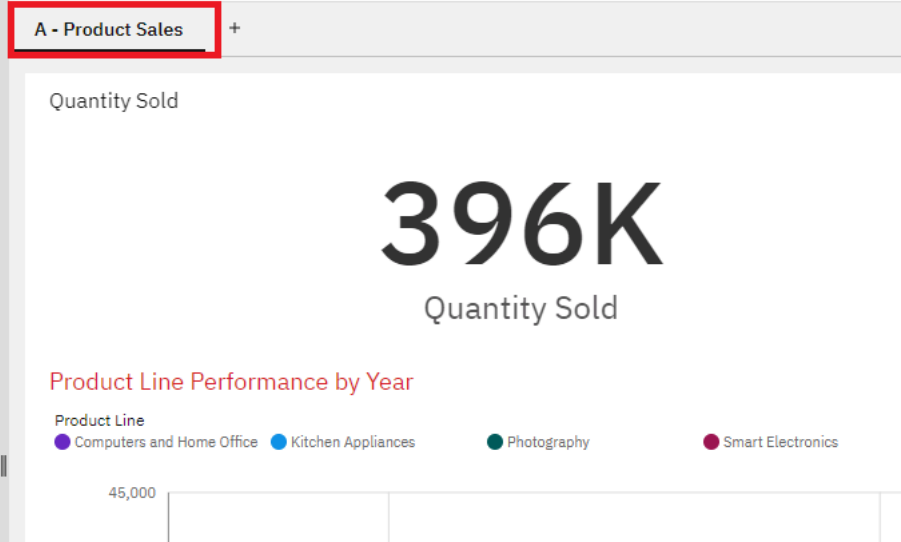
Computers and Home Office Kitchen Ap



10. Click the tab name **Tab 1** and in the mini-menu select **Edit the title**.

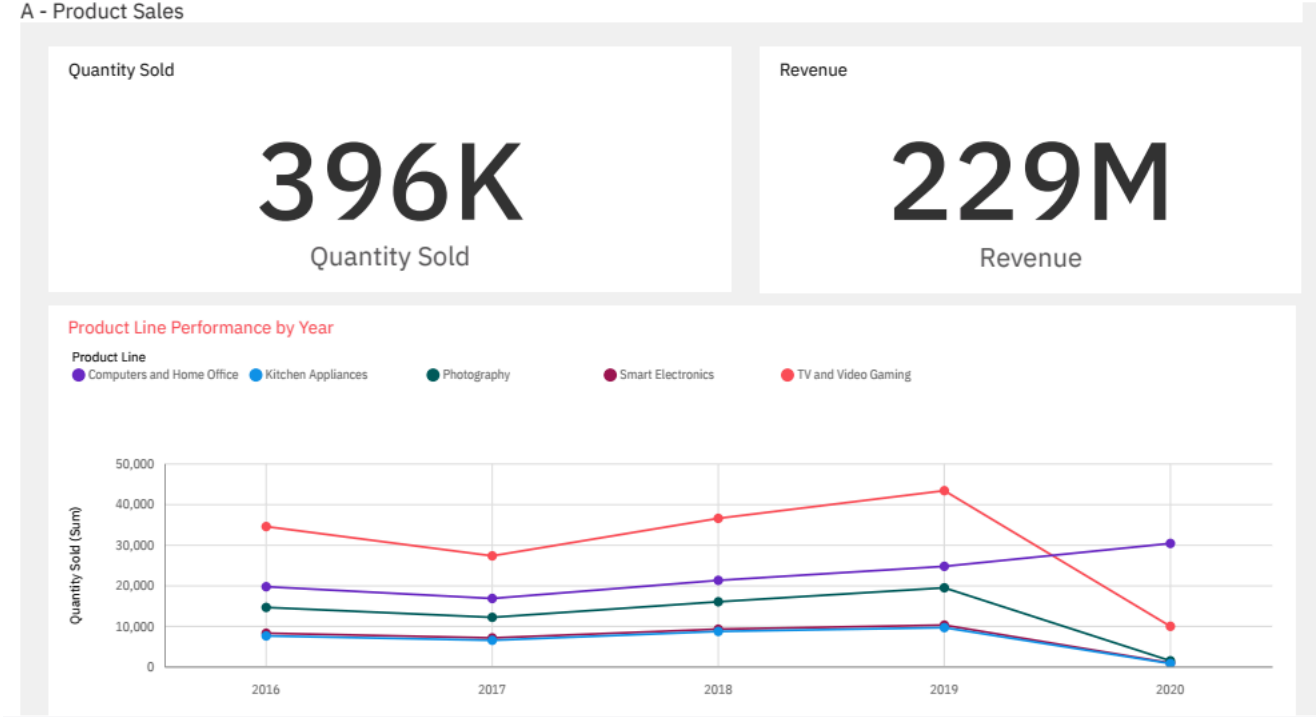


11. Rename the tab to **A - Product Sales**.



12. To save the current state of your dashboard, click the **Save** icon in the toolbar or press **CTRL+S**.

Your completed dashboard **A- Product Sales** should look similar to the image below:



Congratulations! You have completed this lab, and you are ready for the next topic.

Author(s)

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Other Contributor(s)

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