



## Hands-on Lab 4: Getting Started with Cognos Analytics

**Estimated time needed:** 40 minutes

IBM Cognos Analytics is an AI-fueled business intelligence platform that supports the entire data analytics cycle, from discovery to operationalization. It provides users with data discovery capabilities to visually explore and interact with their data to identify the key insights for improving data driven decisions. Users can perform data discovery and then quickly assemble that information into interactive, visually appealing dashboards; all without the need of formal training.

In this lab, first you will learn how to sign up for IBM Cognos Analytics trial plan, and learn general navigation around the Cognos Analytics user interface (UI). Next, 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.

## 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 and 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. If you already have an IBMid, click Log in. Enter your IBMid and password.

 A screenshot of a web browser showing the IBM Cognos Analytics trial sign-up process. The page has a light gray background with a blue header bar. On the left, there's a sidebar with the IBM logo and some introductory text about the trial. The main form area is titled "Start your free trial". 
 

**1. Account information**

 The form fields include:
 

- E-mail**: A text input field containing "gmail.com" with a checkmark indicating it's valid.
- First name**: A text input field containing "Sandip Saha".
- Last name**: A text input field containing "Joy".
- Password**: A text input field with masked text "\*\*\*\*\*". To its right are two small checkboxes: one for "One uppercase character" and one for "One number".
- Country or region of residence**: A dropdown menu set to "Canada".
- State or province**: A dropdown menu set to "Ontario".

 At the bottom of the form is a large blue "Next" button with a hand cursor icon pointing to it.
 

A red arrow points to the "Log in" link in the top right corner of the page, which is located next to the text "If you already have an IBMid, click Log in".

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

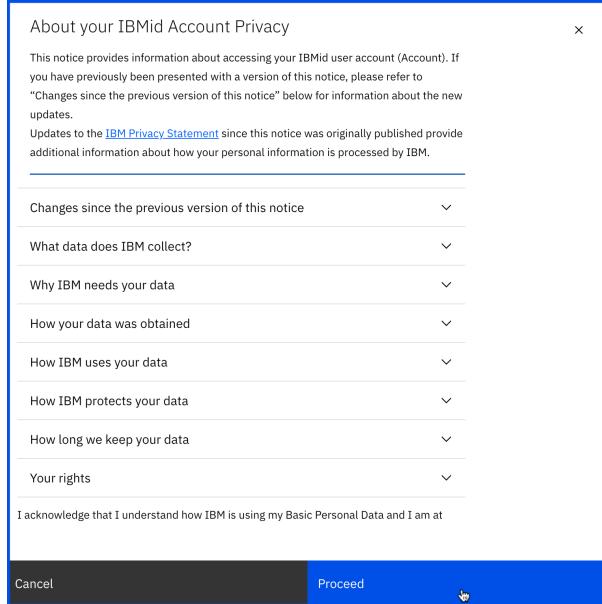
You can withdraw your marketing consent at any time by submitting an [opt-out request](#). Also you may unsubscribe from receiving marketing emails by clicking the unsubscribe link in each email.

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**.



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

Vous vous trouvez sur le site de United States. Rester ici Accéder au site de mon pays/ma région

IBM

My IBM Profile Billing IBMid: [REDACTED]@gmail.com

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## Products

**Trials**  
1 Offering

**Coursera on-line training - Data Visualizations**  
Activation in progress

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7. Click on the **Launch** button of this offering.

# Products

## Trials

1 Offering

The screenshot shows a trial offer card with a blue border. At the top is a small line graph icon. Below it is the title "Coursera on-line training - Data Visualizations". Underneath the title is the status "Active" and the expiration date "Expires on Jan 24, 2021". At the bottom are two buttons: "Launch" (dark blue with white text) and "Manage" (white with blue outline). A cursor arrow is pointing at the "Launch" button.

If it has been more than 72 hours since you initiated your Cognos Trial activation, but its 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.

The screenshot shows the IBM Cognos Analytics homepage. On the left is a sidebar with links for Home, Search, My content, Team content, and Recent. The main area features a welcome message "Hello. Welcome to IBM Cognos Analytics." and a circular progress bar indicating "Trial access 90 day left". Below this are four cards: "Take a quick tour", "How-to videos", "Samples", and "Accelerator catalog". To the right is a "Knowledge Center" sidebar with a list of video tutorials, such as "Fast track your analytics journey with the IBM Accelerate Catalog!" and "IBM Cognos Analytics overview with customer testimonials". At the bottom are sections for "Recent" and "Community".

9. From now on, if you want to sign in to the Cognos Analytics platform with your IBMid, go to [myibm.ibm.com](http://myibm.ibm.com). Enter your IBMid and password. Repeat step 7 and 8.

Log in to IBM

IBMid [Forgot IBMid?](#)

Remember Me [\(i\)](#)

**Continue** 

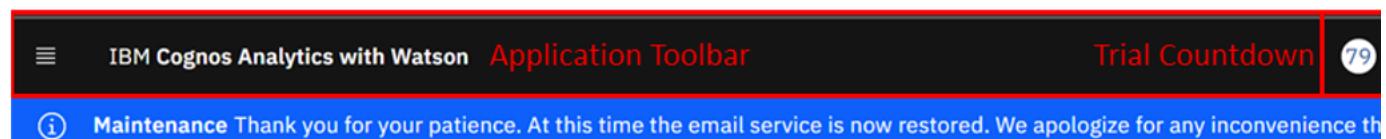
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Do not have an account? [Create an IBMid](#)

## Exercise 2: Navigate around Cognos Analytics UI

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

1. The goal of the Cognos Analytics user interface (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.



Hello. Welcome to Cognos Analytics with Watson.

You can get started right away by taking a look at our introduction video, product tour and Getting Started tab.

**Watch video** **Take a product tour**

**Video Demonstration**

^ Quick launch

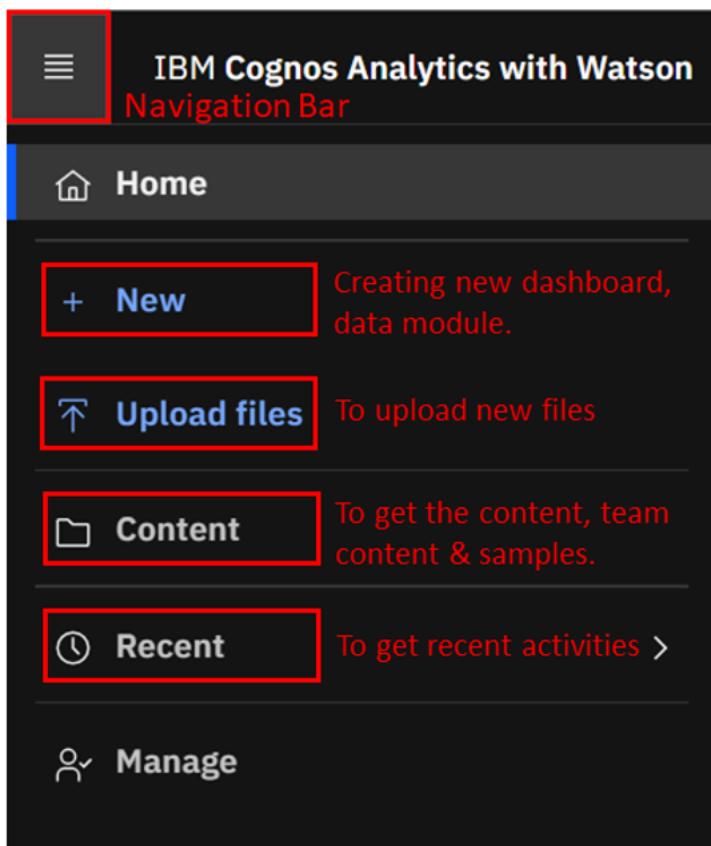
 **Upload data**  
Upload or drag and drop spreadsheets, csv files, and other data sources.

**Upload Dataset**

 **Prepare data**  
Use data modules to clean and connect data from multiple resources.

 **Exploration**  
Quickly find unbiased answers by identifying trends in your data with d...

2. Click on the **Navigation Bar**, you can use the **Content** to work on different **Samples** The canvas now shows the Recently used files in the **Recent** section, if any, along with the **File drop zone** where you can easily upload your external data files.



3. Once you begin working with content, the canvas will update with your recently used items. In your Cognos Analytics instance, you may see recent content on the canvas.

## 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. To sign in to the Cognos Analytics platform with your IBMID, go to [myibm.ibm.com/dashboard/](#).
3. Enter your IBMID and password.
4. Scroll down and click **Launch**.

# Products

## Trials

1 Offering



### IBM Cognos Analytics on Cloud - Trial

Active

Expires on Oct 16, 2020

Launch

Manage

5. To upload a file, you may either drag and drop this file into the File Drop Zone (highlighted in the image above), or you may click **Upload files** at the bottom left corner to navigate to where the file is saved. For this lab, we will use the second option. Click **New > Upload files**.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a navigation bar with a back arrow and the title "IBM Cognos Analytics". Below it is a dark header with the text "Get quick answers with the Assistant" and a sub-instruction "Ask the Assistant a question in your own words to uncover insights about your data." On the right, there's a blue speech bubble icon. The main content area has a light blue header "Introduction to Cognos Analytics" with the sub-instruction "Leverage self-service analytics to make more confident decisions." and a "Get started" button. A large red box highlights a section titled "To upload the dataset" with the sub-instruction "Upload data and start creating content". This section includes a blue up arrow icon and the text "Upload spreadsheets, CSV files, and other types of files, and create content based on these files." To the right, there's another section with a blue folder icon and the sub-instruction "Create content from existing data".

6. Click on Drag and drop file here or click to upload, 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](#)

7. As the file uploads, status bars will be visible as the upload process reads and analyzes the data being brought in. Once it completes, the status bar will update to show the successful completion before closing.

< IBM Cognos Analytics

## Upload data and start creating content

CustomerLoyaltyProgram (12).csv was uploaded successfully. [Hide Details](#)

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

Add file

CustomerLoyaltyProgram (12).csv [Delete](#)

[Cancel](#) [Back](#)

8. Convert the **CustomerLoyaltyProgram.csv** to **Data module** by selecting the **Data module** in **Other options** and click **Create**.

Select one of the available types of assets to create from the uploaded file.

**Recommended**

- Dashboard**  
Visualize and share your business performance.
- Insights in Assistant**  
Ask questions in natural language, and discover insights.

**Other options**

- Data module**  
Make meaningful connections between your data sources.
- Exploration**  
Discover and analyze data in a flexible workspace.

[Cancel](#) [Back](#) [Skip](#)

## Task B: Edit Data Module and view the table on IBM cognos.

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

1. Navigate to the **CustomerLoyaltyProgram data module**. Click **Action Menu** (represented by three dots) under it. Next click the **Edit Data Module** to create a **Data Module**.

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.

**Recent**

1 item selected

Customer Loyalty Program data module

Last Accessed 9/8/2023, 5:02 AM

**Action Menu**

- Edit data module**
- Create report
- Create exploration
- Create dashboard
- Create data module
- Create data set
- Share
- Copy or move to
- Add shortcut
- Edit name and description
- Properties
- Details
- Remove from recent
- Delete

More + Create ▾ Remove

2. A New Data Module will be created. Click on the Action Menu (represented by three dots) of **New data Module**. Next click the **Table** option under the **Action Menu** to launch the **Create Table** window.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a navigation bar with icons for back, forward, search, and refresh. Below it is a toolbar with various icons. The main area is titled 'Data module' and has tabs for 'Grid', 'Relationships', and 'Custom tables'. A search bar is present. On the left, there's a tree view of data sources, including 'CustomerLoyaltyProgram.csv' which is expanded to show columns like Row Id, Loyalty#, First Name, Last Name, etc. A context menu is open over the 'New data module' option in the top-left corner. The 'Table...' option in this menu is highlighted with a red box. To the right of the menu, there's a circular icon with a preview grid and the text 'Preview data' and 'To preview data, select a table, a column in a table, or a folder that contains columns.'

- Click on the **Select Tables** button in the **Create table** screen. Select the uploaded dataset **CustomerLoyaltyProgram.csv**. Finally, click the **Next** button to proceed with the creation of the table.

The screenshot shows the 'Create table' dialog box. On the left, there's a sidebar with a 'Select tables' section containing a grid icon and a '+ Add' button. Below it is another 'Select tables' section with the text 'Select and add tables to create a new table from' and a 'Select tables' button, which is highlighted with a red box. The main area has a 'Selected tables' section with a 'CustomerLoyaltyProgram.csv' entry and a 'Find' button. To the right, there's a 'View of tables' section with a 'Find' button and a list of options: 'Shortcut to a table', 'Alias of a table', 'Copy of a table', 'Joined view', 'Union of tables', 'Intersect of tables', and 'Except of tables'. Each option has a brief description below it. At the bottom, there are 'Cancel' and 'Next' buttons, with 'Next' highlighted with a red box.

- Click the **Refresh** button in the **Create a view of a table** window to view the data.

## Create a view of a table

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

Select items	Row Id	Loyalty#	First Name	Last Name	Customer Name	Country
<input type="checkbox"/> CustomerLoyaltyProgram.csv <input checked="" type="checkbox"/>						
					Data will appear here	
					<b>Refresh</b>	
<b>Invert</b>	<b>Clear all</b>					

(29) columns selected.

**Previous** **Cancel** **Finish**

5. Now you will be able to see view the data in the table, click on the **Finish** button.

<

Create a view of a table

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

Select items	Row Id	Loyalty#	First Name	Last Name	Customer Name	Country
<input type="checkbox"/> CustomerLoyaltyProgram.csv <input checked="" type="checkbox"/>	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 King
	8	723924	Adolph	Prey	Adolph Prey	Germany
	9	202299	Adria	Osterstuck	Adria Osterstuck	Canada
	10	826271	Adriane	Dottin	Adriane Dottin	Canada
	11	616030	Akilah	Caravalho	Akilah Caravalho	Germany
	12	747903	Al	Johson	Al Johson	United Stat
<b>Invert</b>	<b>Clear all</b>					

(29) columns selected.

**Previous** **Cancel** **Finish**

6. The new table view will be added in source panel now save this Data Module using the **Save** option.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a navigation bar with icons for back, forward, search, and other functions. Below it is a toolbar with a 'Save' button highlighted with a red box. The main area is titled 'Data module' and contains a tree view of columns from a CSV file. A specific node, 'CustomerLoyaltyProgram.csv - View (1)', is selected and highlighted with a red box. To the right, there are tabs for 'Grid', 'Relationships', and 'Custom tables', with 'Custom tables' being the active tab. Below the tree view, there's a diagram showing relationships between tables: 'CustomerLoyaltyProgram.csv' and 'CustomerLo...- View (1)'. The 'CustomerLo...- View (1)' table is also highlighted with a blue box.

7. In the new popup window labeled **Save as**, Give the name **Customer Loyalty Program data module** and select **My content** tab, click on the ‘Save’ button to proceed.

The screenshot shows a 'Save as' dialog box. At the top, it says 'Save as'. Below that is a 'Name' field containing 'Customer Loyalty Program data module', which is highlighted with a red box. Underneath, it says 'Selected destination: My content' and shows two tabs: 'My content' (which is highlighted with a red box) and 'Team content'. The main area is a table listing files. The table has columns for 'Name', 'Type', and 'Last Accessed'. It contains three entries:

Name	Type	Last Accessed
CustomerLoyaltyProgram.csv CSV	Uploaded file	23/06/2023, 01:57
Newdash	Dashboard	18/04/2023, 06:06
popular-language (4).csv CSV	Uploaded file	26/05/2023, 04:31

At the bottom of the dialog box, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a large blue box.

8. Next, please navigate to the menu option of IBM Cognos, which is represented by three horizontal lines. Click on the menu and select the ‘Content’ option from the available choices.

The screenshot shows the IBM Cognos Analytics interface. On the left, there is a dark sidebar with various options: Home, New, Upload data, Content (which is highlighted with a red box), Recent, and Manage. The main area has tabs at the top: Grid, Relationships, and Custom tables (which is underlined). Below the tabs, it says 'CustomerLoyaltyProgram.csv - View (1)'. The content area is currently empty.

9. You will now be able to locate the **Customer Loyalty Program data module** under the **My Content** tab.

The screenshot shows the 'Content' tab in IBM Cognos Analytics. At the top, there are three tabs: 'My content' (which is highlighted with a red box), 'Team content', and 'Samples'. Below the tabs, there are several items listed in a grid:

- Customer Loyalty Program data module**: Last Accessed 23/06/2023, 03:18. This item is also highlighted with a red box.
- CustomerLoyaltyProgram.csv**: Last Accessed 23/06/2023, 01:57. A CSV download icon is next to it.
- Newdash**: Last Accessed 18/04/2023, 06:06. A dashboard icon is next to it.
- popular-language (4).csv**: Last Accessed 26/05/2023, 04:31. A CSV icon is next to it.

## Task C: Start a New Dashboard with Templates

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

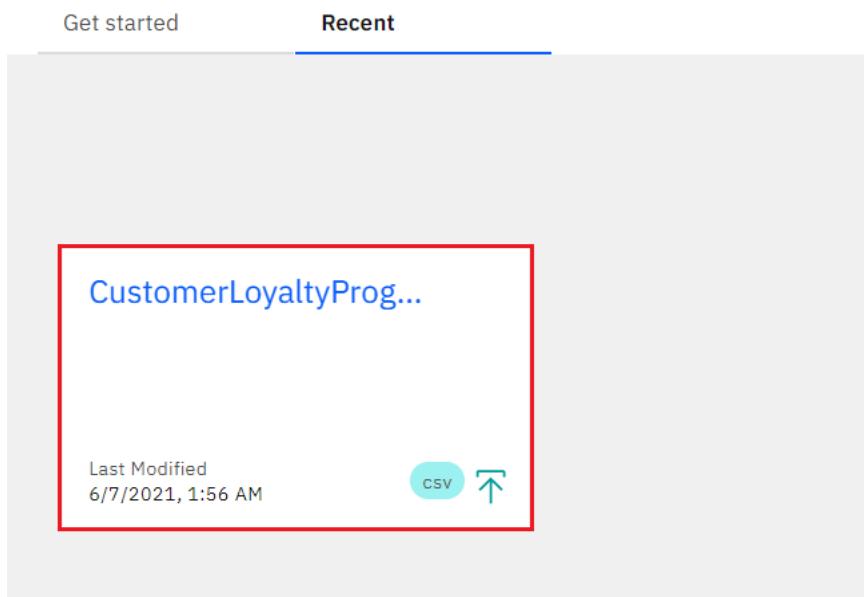
1. Click on the uploaded data file **CustomerLoyaltyProgram.csv**.

Get started      **Recent**

CustomerLoyaltyProg...

Last Modified  
6/7/2021, 1:56 AM

CSV 

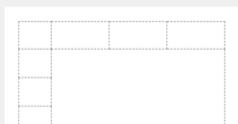


2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.

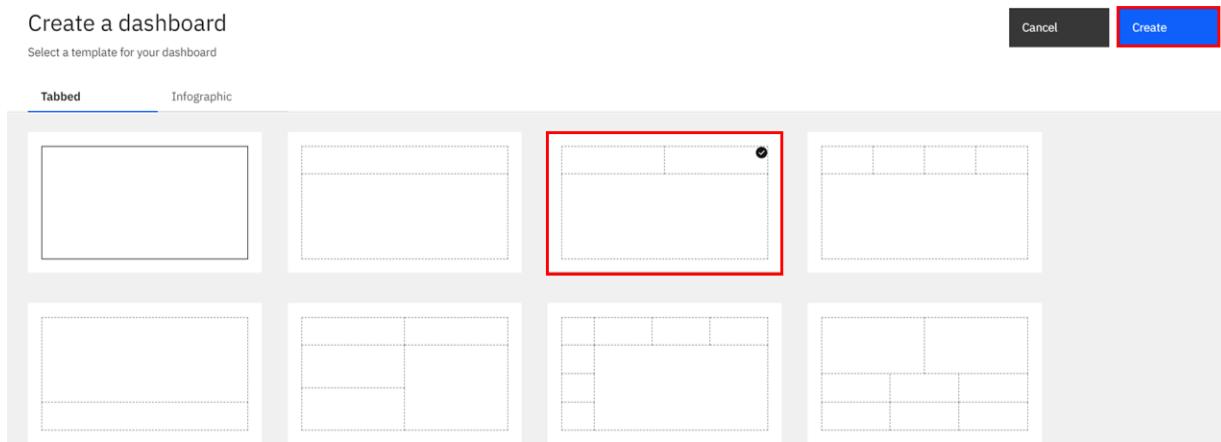
Create a dashboard

Select a template for your dashboard

**Tabbed** **Infographic**

**Create**

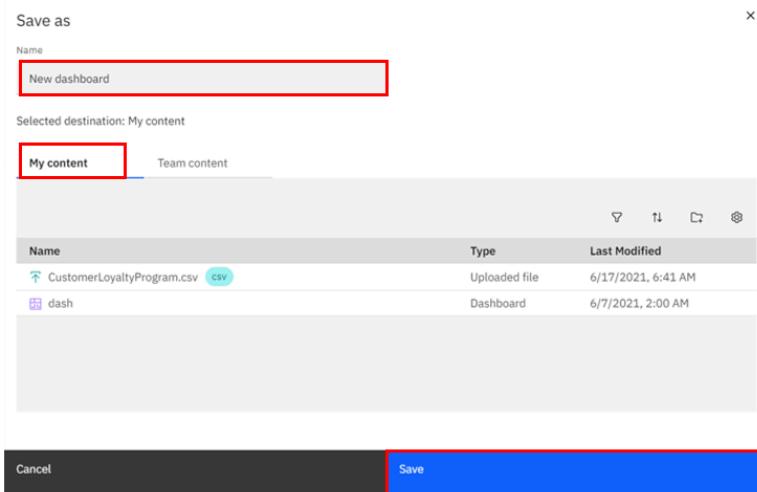


3. Now you have created a new dashboard using the dashboard template.  
updat

**Application Toolbar**

The screenshot shows the Cognos Analytics interface. On the left, there is a **Navigation Panel with Dashboard Toolbox**. In the center, there is a **Data Source Panel** which lists various data sources from a selected CSV file. On the right, there is a **Dashboard Template** with a single tab labeled **Tab 1**. A red box highlights the **Filter Dock** at the top of the dashboard template area.

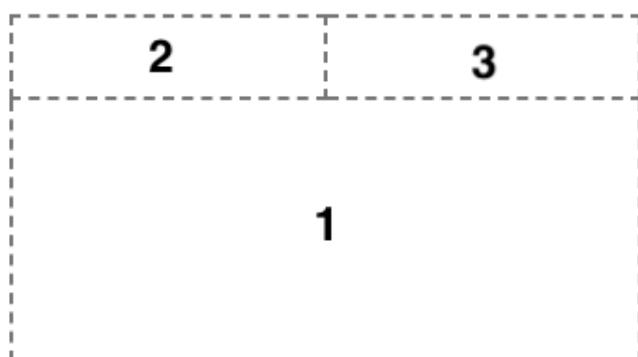
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



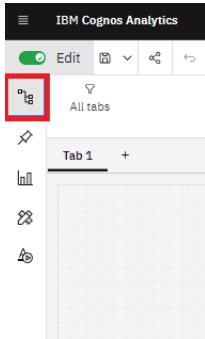
## Task D: Create a Simple Dashboard

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.



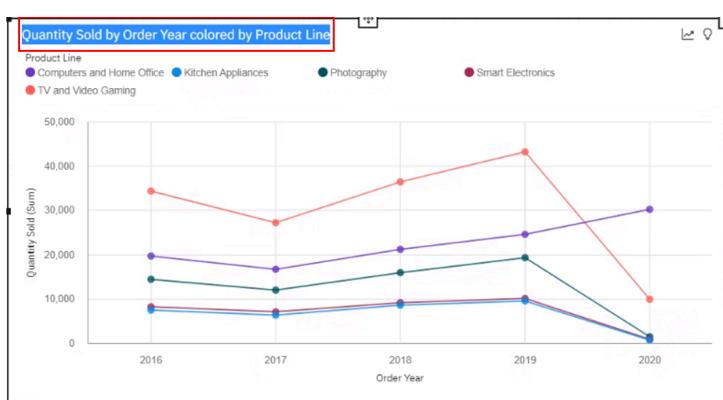
2. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the uploaded file \*\*CustomerLoyaltyProgram.csv\*\* as the Selected Source.



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

4. Click on the **Line chart** in panel 1 to bring it into focus and render the **on-demand toolbar**.

5. From the on-demand toolbar, select the title and enter the title “Product Line Performance by Year” to the visualization.

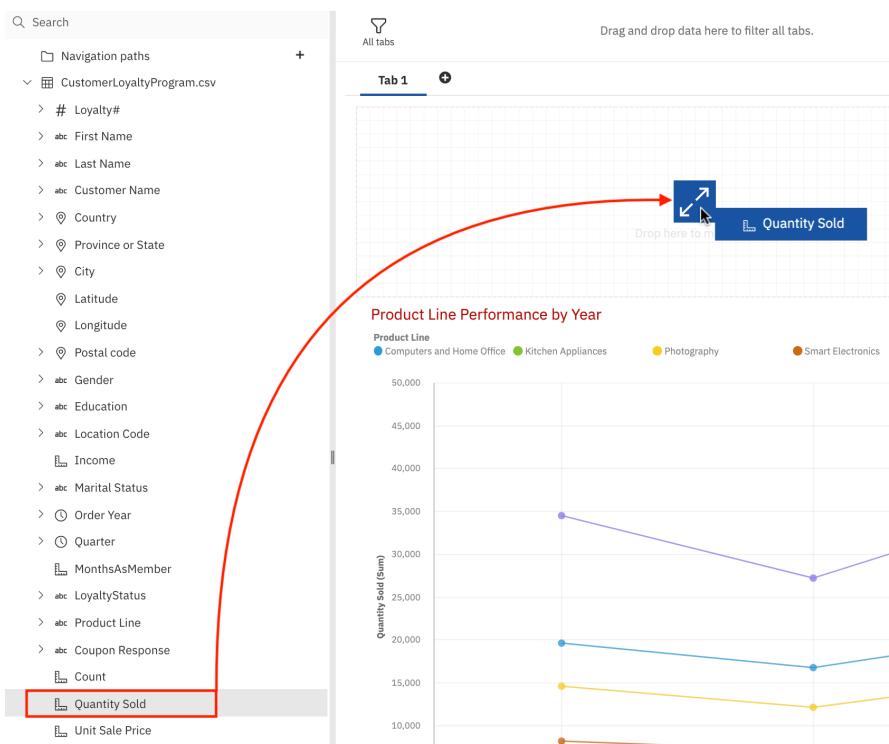


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.

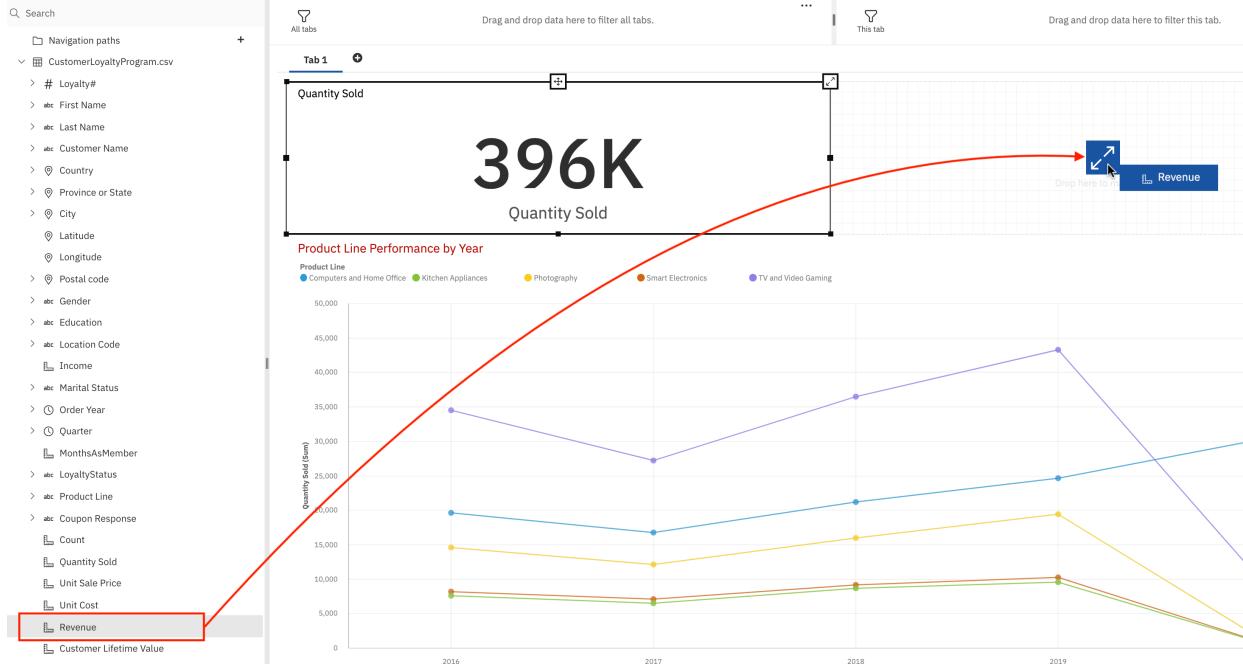


7. Click the **Color picker** icon, and change the color to **Red**, then click the font size drop-down and choose **18**.

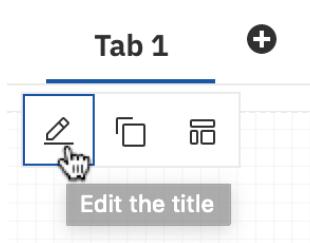
8. From the **Data Source** panel, select **Quantity Sold** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone turn blue**.



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 turn blue**.

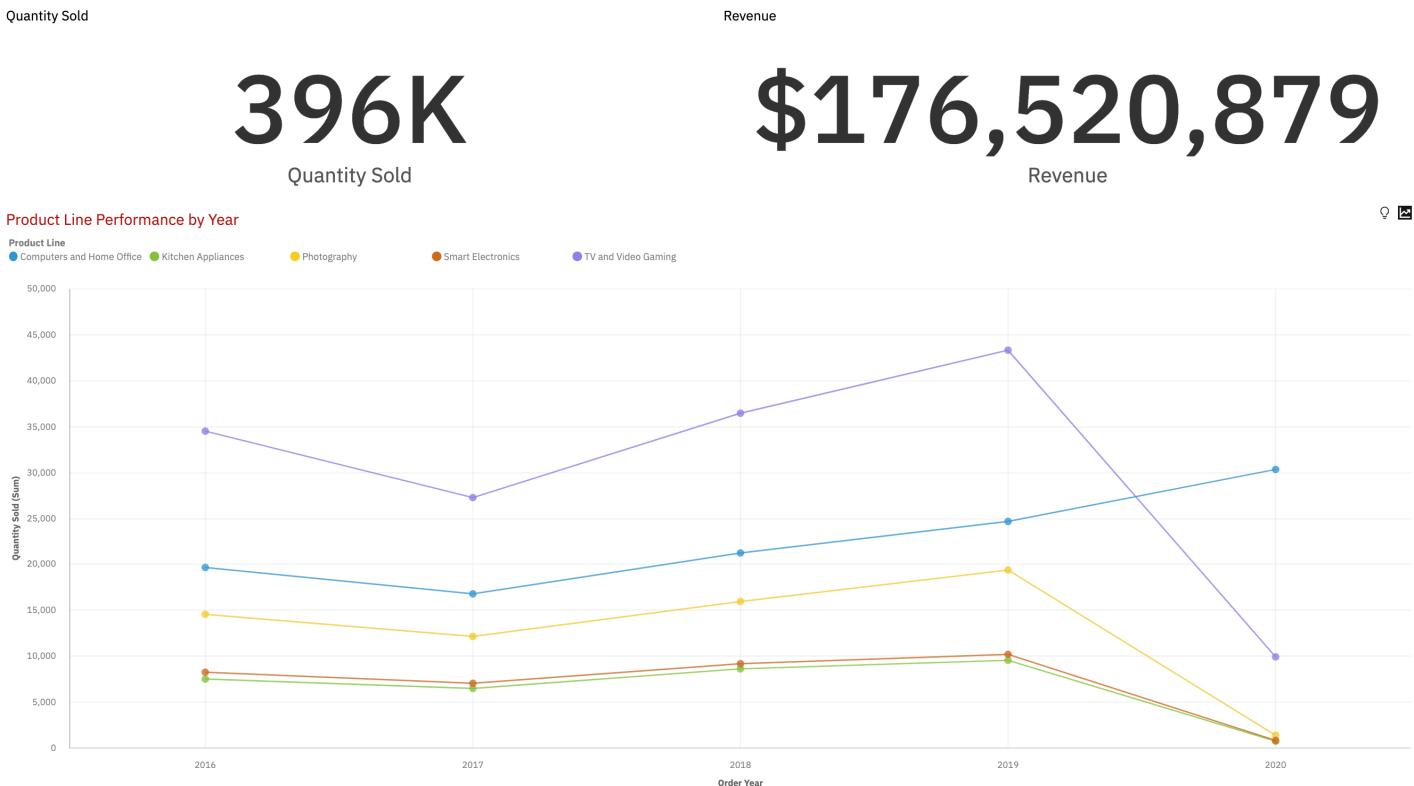


10. Click on the tab name **Tab 1** to bring up the Tab-on-demand toolbar. Select the **Edit** icon.



11. Rename the tab to "A - Product Sales"◆12. To save the current work of the dashboard, press **CTRL+S**.

Finally, your dashboard "A - Product Sales" should look like below:



Congratulations! You have completed Lab 4, and you are ready for the next topic.

## Author(s)

- [Sandip Saha Joy](#)

## Other Contributor(s)

- [Steve Ryan](#)

## Changelog

Date	Version	Changed by	Change Description
2023-09-08	2.6	Niveditha Pandith	Updated the screenshot
2023-06-23	2.5	Pooja Patel	Added new task
2022-05-19	2.4	Malika Singla	Updated dataset used
2022-02-02	2.3	Malika Singla	Updated the screenshots
2021-07-14	2.2	Malika Singla	Updated trial link
2021-06-18	2.1	Malika Singla	Updated the screenshot as per new UI
2021-03-11	2.0	Steve Ryan	Lab rearrangement
2020-09-23	1.2	Steve Ryan	Post review changes
2020-09-16	1.1	Steve Ryan	ID review
2020-09-14	1.0	Sandip Saha Joy	Initial version created

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