



# 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. Source:

<https://www.ibm.com/cloud/garage/dte/tutorial/ibm-cognos-analytics-1113-getting-started-exploration-0>. 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.

## 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

Already have an IBM account? [Log in](#)

## Start your free trial

### 1. Account information

E-mail (i)

Your email address will become your IBMID, which you'll use to log into IBM.com.

@gmail.com



We'll send you a 7 digit code that you'll use to verify your email in step 3.

First name

Last name

Sandip Saha

Joy

Password

.....



– 8 characters minimum

– One uppercase character

– One lowercase character

– One number

Country or region of residence

State or province

Canada

Ontario

Next



- 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



- 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). 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 new 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 at

[Cancel](#)

[Proceed](#)



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

The screenshot shows the IBM myIBM dashboard. At the top, there are language options for 'United States' (with 'Rester ici' and 'Accéder au site de mon pays/ma région' buttons) and a search bar. The user's IBM ID is listed as 'IBMid: [REDACTED]@gmail.com'. Below the header, a 'Need help? Get product support' link is visible. The main content area is titled 'Products' and contains a section for 'Trials'. It shows '1 Offering' for 'Coursera on-line training - Data Visualizations'. The offering card includes a small icon, the title, a status message 'Activation in progress', and a 'View support information' button. To the right of the offering, there is a promotional message about IBM providing technology and business solutions, followed by a 'View catalog' button. At the bottom of the page, there are links for 'Contact IBM', 'Privacy', 'Terms of use', 'Accessibility', and 'Cookie preferences', along with a language selector for 'United States - English'.

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

This is a zoomed-in view of the 'Coursera on-line training - Data Visualizations' offering card. The card has a blue header bar. Below it, the word 'Active' is displayed in green, followed by the expiration date 'Expires on Jan 24, 2021'. At the bottom of the card are two buttons: a dark blue 'Launch' button with a white outline and a light blue 'Manage' button with a dark blue outline. A cursor is shown clicking the 'Launch' button.

8. You have successfully launched the Cognos Analytics platform.

Hello. Welcome to IBM Cognos Analytics.

Unearth hidden insights with a personalized analytics experience driven by AI.

**Recent**

**Take a quick tour**  
Experience Cognos Analytics by using guided walkthroughs.

**How-to videos**  
Watch short videos to learn how to use Cognos Analytics and start gaining insights into your data.

**Samples**  
Get inspired by our samples! See what you can build with Cognos Analytics.

**Accelerator catalog**  
Browse a growing catalog of assets to enhance your experience. Please see the Accelerator Catalog FAQ for supp...

**Knowledge Center**

- Fast track your analytics journey with the IBM Accelerator Catalog!**  
Analytics platforms like IBM Cloud Pak for Data and their composite products and services such as Cognos Analytics, Watson Studio, Planning Analytics and ...
- IBM Cognos Analytics: overview with customer testimonials**  
This video provides an overview of the key features of IBM Cognos Analytics: • An interface designed...
- How to create your first dashboard (11.1.0+)**  
This video is intended for beginners, to help them get started with authoring dashboards. In this vi...
- How to create your first report (11.1.0+)**  
This video is intended for beginners, to help them get started with authoring reports. In this video...
- How to upload your own data (11.1.x)**  
In this video you will learn how to upload a file, create a basic data module, and replace/append an...
- How to create an exploration (11.1.x)**  
Welcome to our video about how to create an exploration. In this video we will show how to create a ...
- Getting started with your first story**

**Community**

**What's new**

**Launch the tour**

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

Log in to IBM

IBMid [Forgot IBMid?](#)

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

**Continue**

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.

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

**VIDEO DEMONSTRATION**

[Watch video](#) [Take a product tour](#)

**TRIAL COUNTDOWN**

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

**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 data exploration.

**Present data**  
Create sophisticated, multi-page, multi-query dashboards, reports, or stories.

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.

**IBM Cognos Analytics**  
**Navigation Bar**

- Home**
- + New** To Upload the files
- Upload files** Live, Interactive Content
- Content** To get recent activities
- Recent**
- Manage**

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**.

The screenshot shows a 'Products' page with a blue header bar. Below it, a section titled 'Trials' displays '1 Offering'. A card for 'IBM Cognos Analytics on Cloud - Trial' is shown, featuring a small line graph icon, the title, and the status 'Active' with an expiration date of 'Expires on Oct 16, 2020'. At the bottom of the card are two buttons: 'Launch' (highlighted with a red box) and '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 **New > 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**, then browse to the file download location, select the CSV file, and click **Open**.

The screenshot shows the 'Switcher Menu' with four options: 'Upload data', 'Prepare data', 'Exploration', and 'Present data'. The 'Upload data' option is highlighted with a red box. A tooltip 'To Upload the dataset' is visible above the menu.

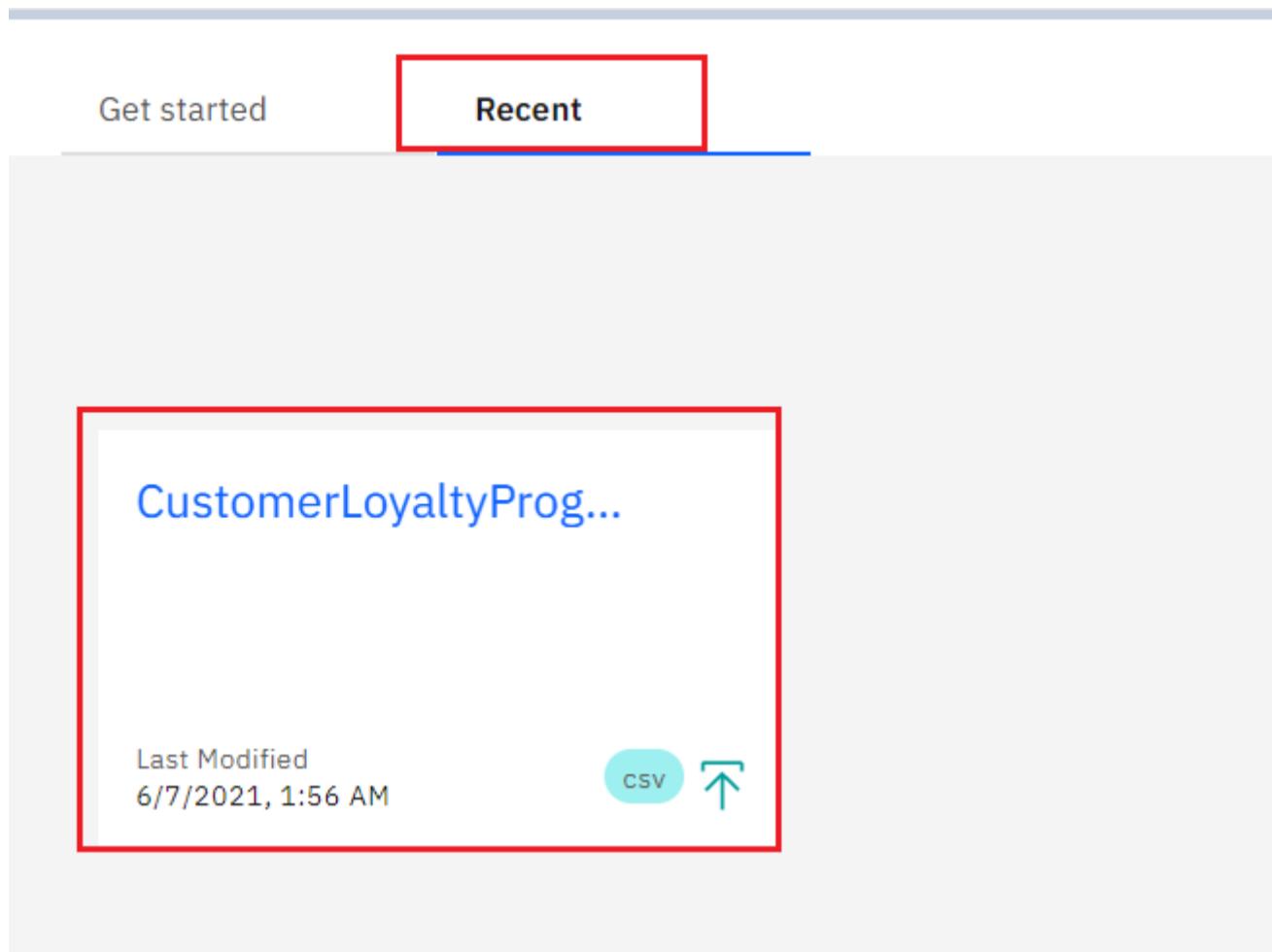
6. As the file uploads, notice that under the **Switcher Menu**, a series of status bars will be visible as the upload process reads and analyzes the data being brought in.

A screenshot of a status bar with the text 'Reading CustomerLoyaltyProgram.csv...' and a progress bar. On the right side, there are 'Cancel' and 'Details' buttons.

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

A screenshot of a status bar with the text 'CustomerLoyaltyProgram.csv was uploaded successfully.' and a 'Hide Details' button.

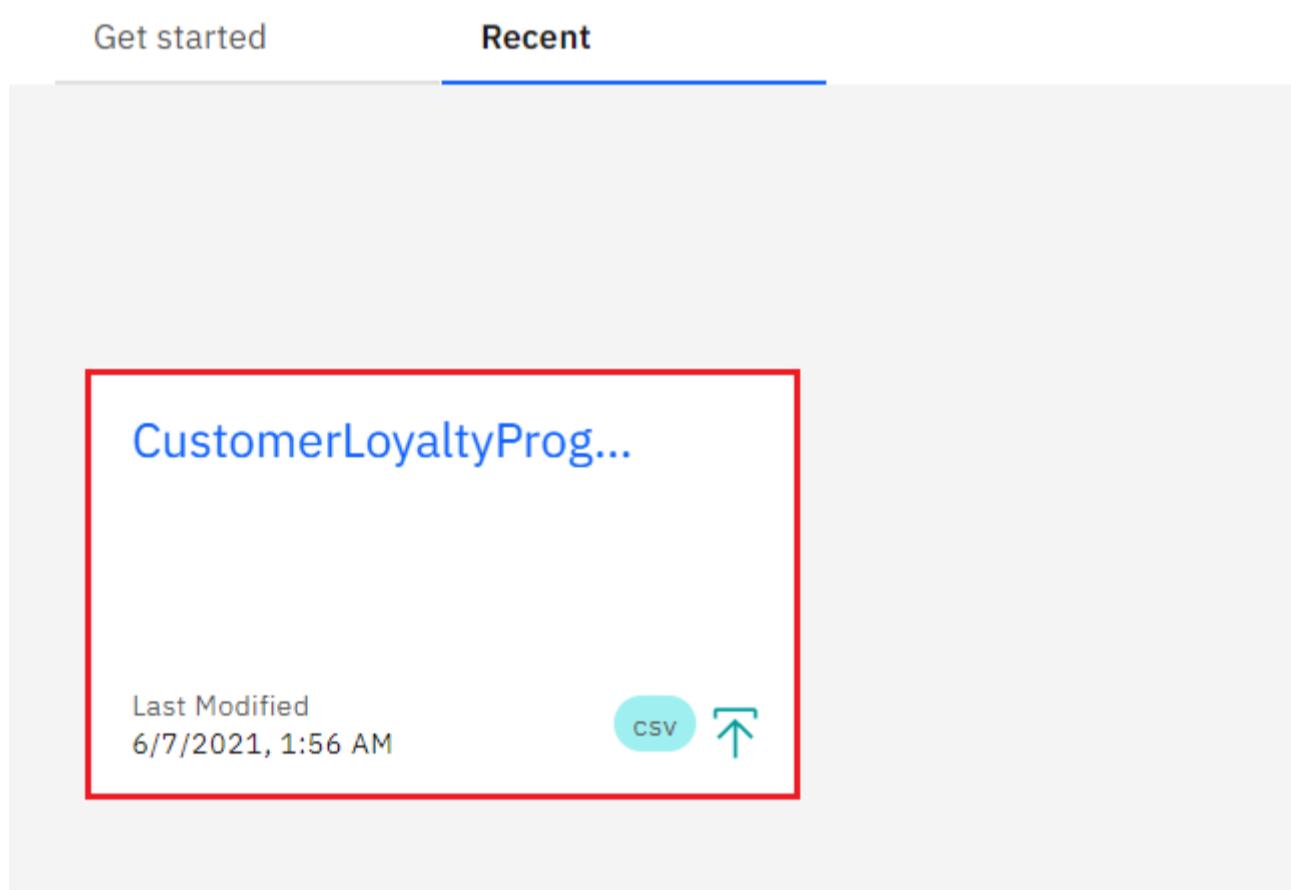
8. In the **Recent** section, you will see the new uploaded data file.



## Task B: 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**.



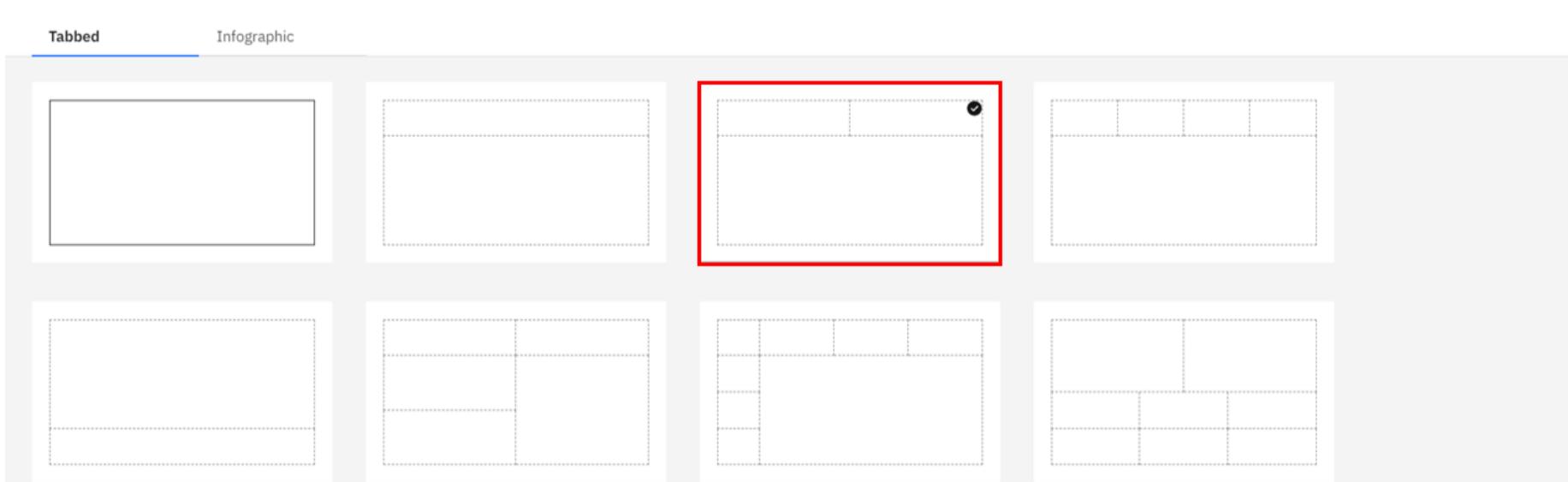
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.

## Create a dashboard

Select a template for your dashboard

[Cancel](#)

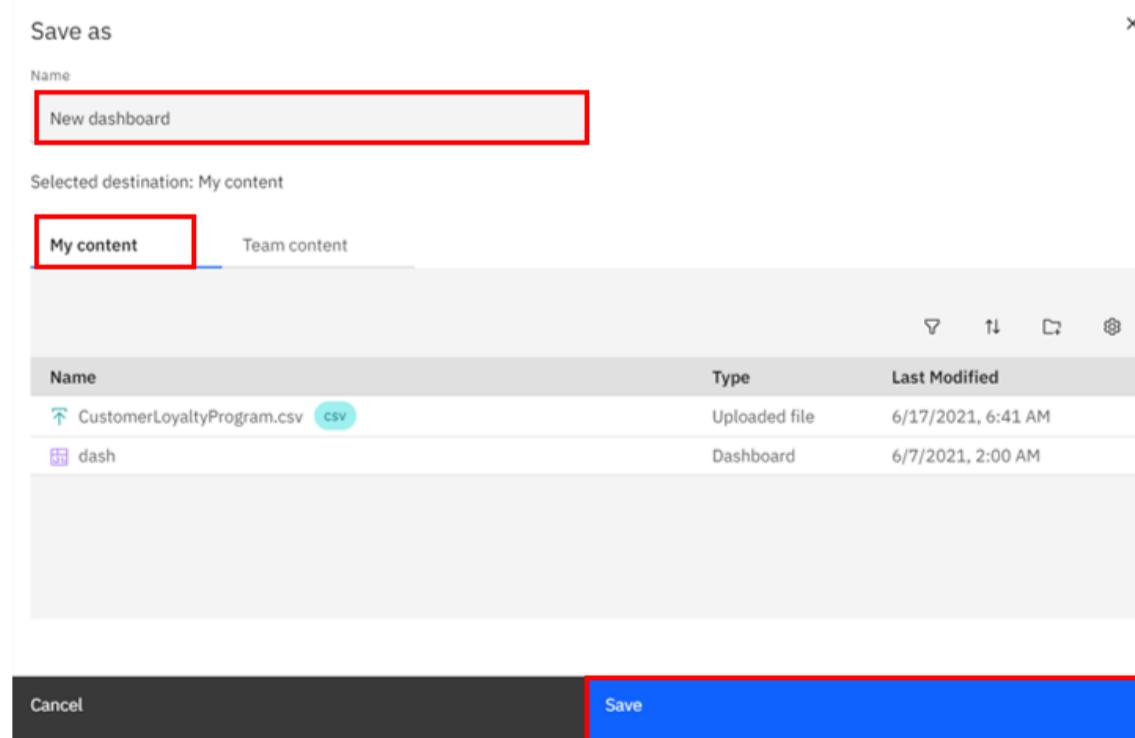
[Create](#)



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

The screenshot shows the Cognos Analytics workspace. At the top is the Application Toolbar with various icons. Below it is the Filter Dock, which includes tabs for 'All tabs' and 'This tab', with sections for 'Filters' and 'Fields'. To the left is the Navigation Panel with Dashboard Toolbox, containing a 'Selected sources /' section with 'CustomerLoyaltyProgram.csv' and a detailed 'Data Source Panel' showing fields like Loyalty#, First Name, Last Name, etc. The main area is the 'Dashboard Template', which currently contains a single tab labeled 'Tab 1'. A red box highlights the 'Data Source Panel' in the Navigation Panel.

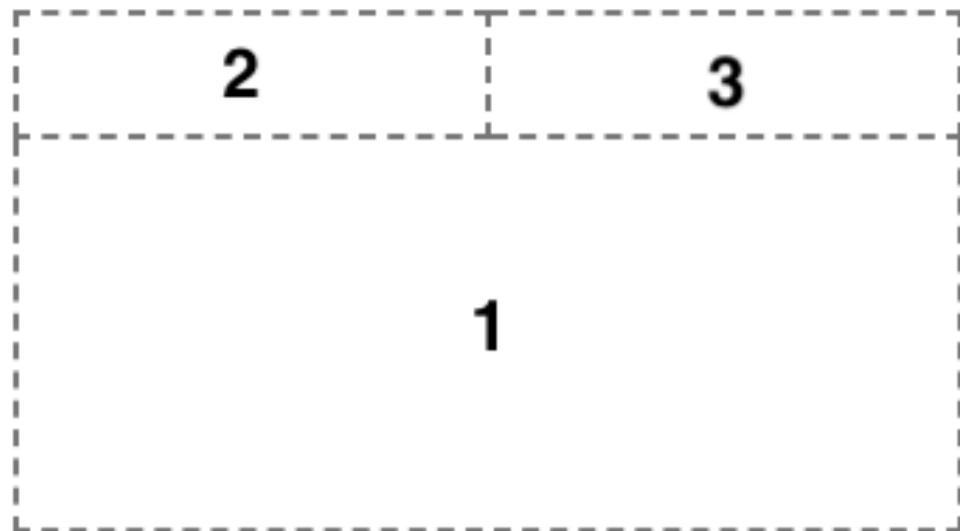
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write "Simple dashboard", and click **Save**.



## Task C: Create a Simple Dashboard

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

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



- 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.



- 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**.

Q Search

Navigation paths +

All tabs Drag and drop data here to filter all tabs. ... This tab

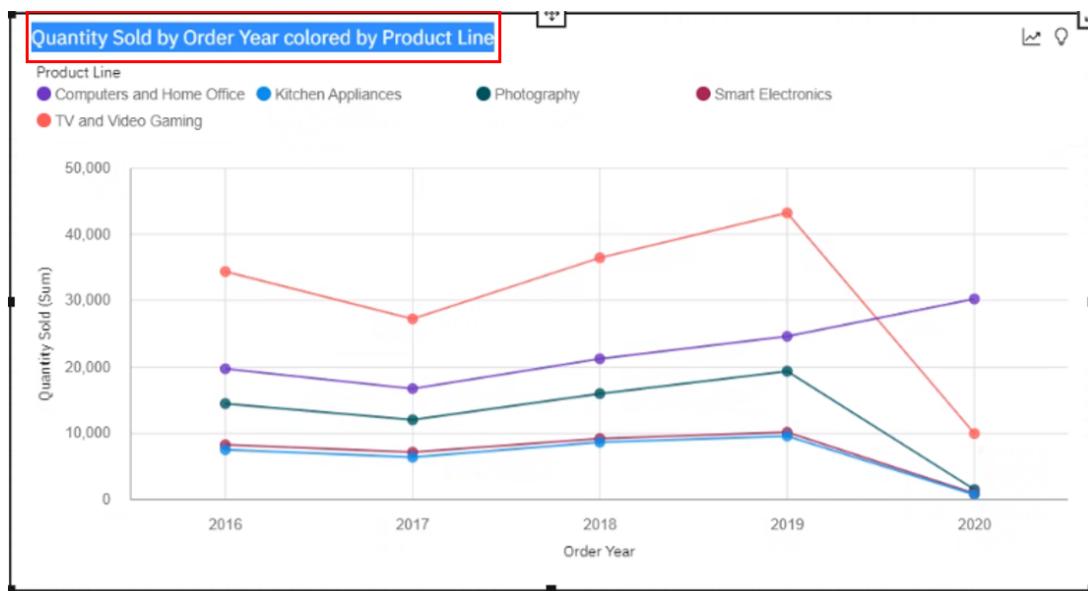
**Tab 1** +

CustomerLoyaltyProgram.csv

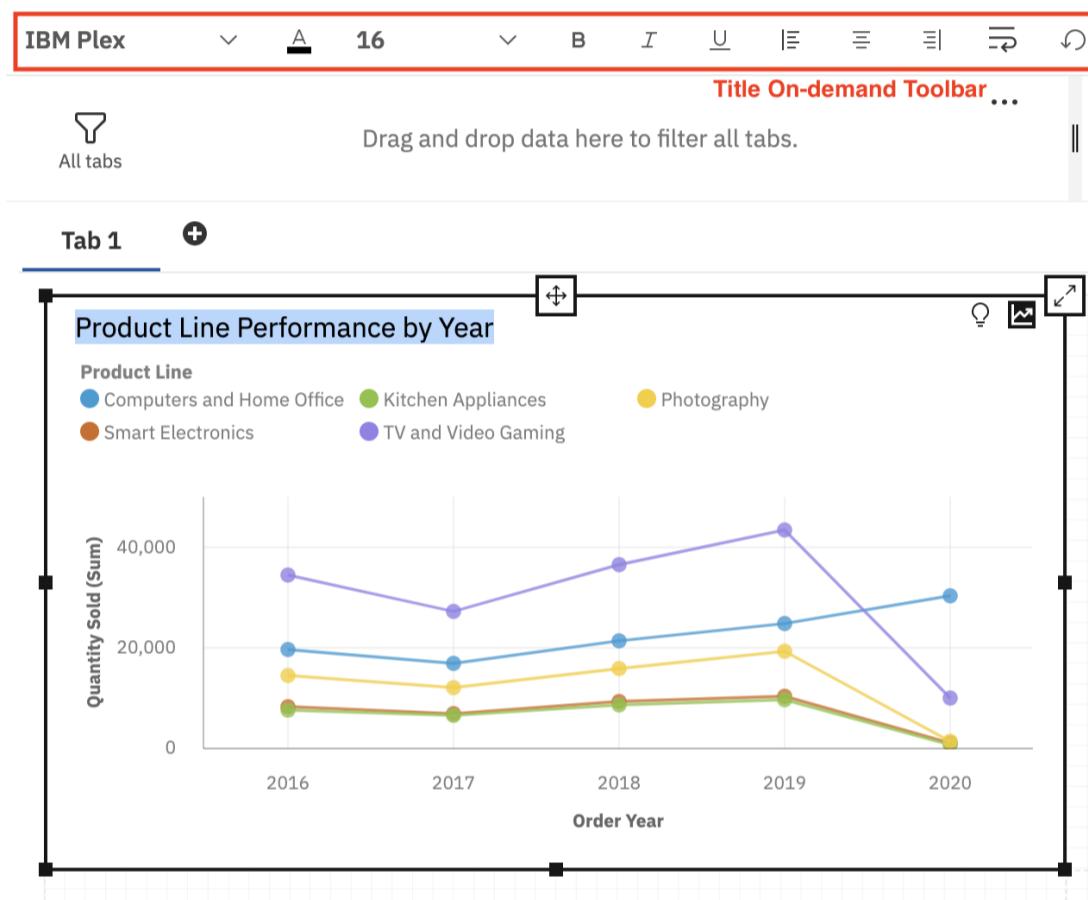
- # Loyalty#
- abc First Name
- abc Last Name
- abc Customer Name
- Country
- Province or State
- City
- Latitude
- Longitude
- Postal code
- Gender
- Education
- Location Code
- Income
- Marital Status
- Order Year**
- Quarter
- MonthsAsMember
- LoyaltyStatus
- Product Line**
- Coupon Response
- Count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

- 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.

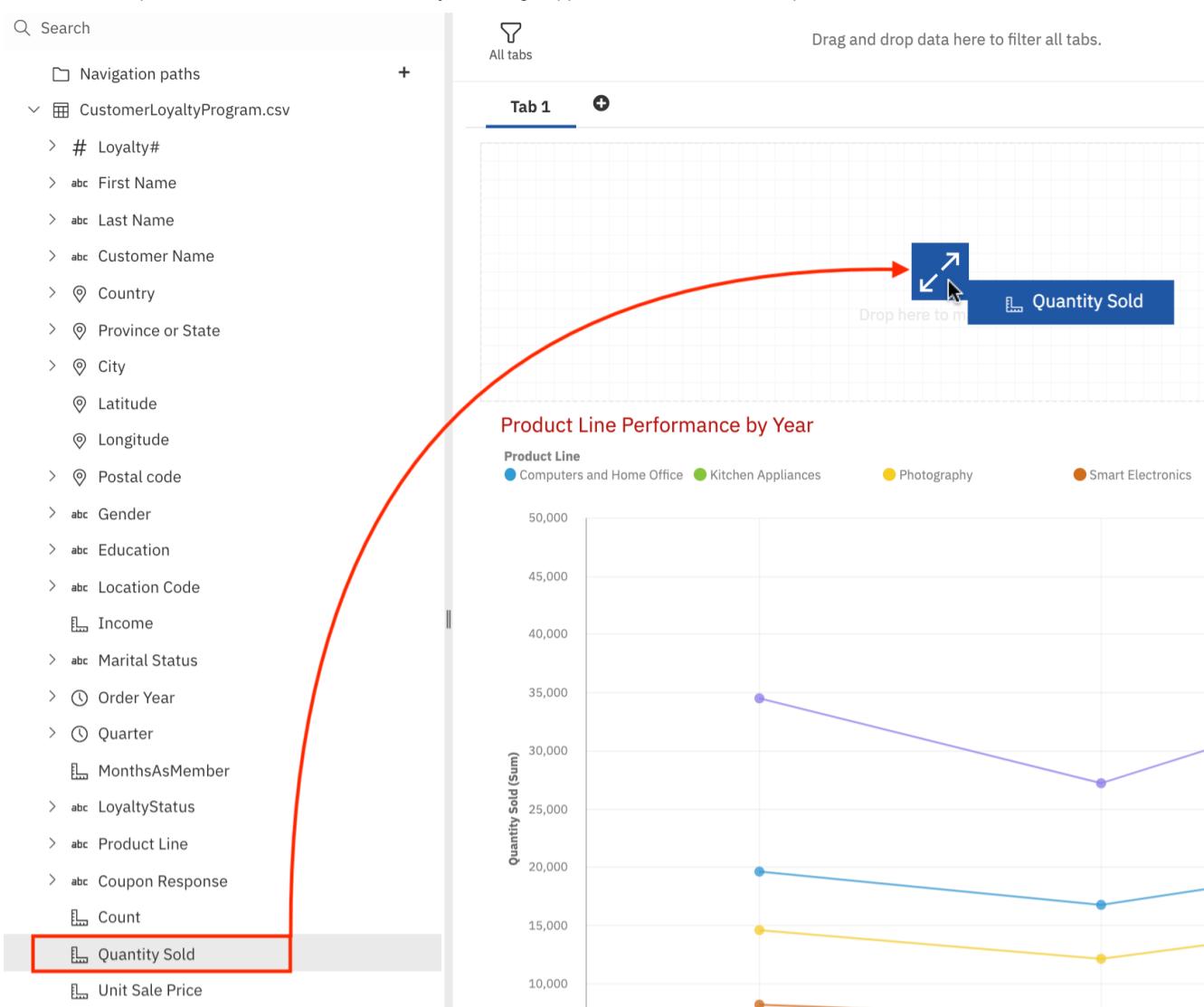


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.

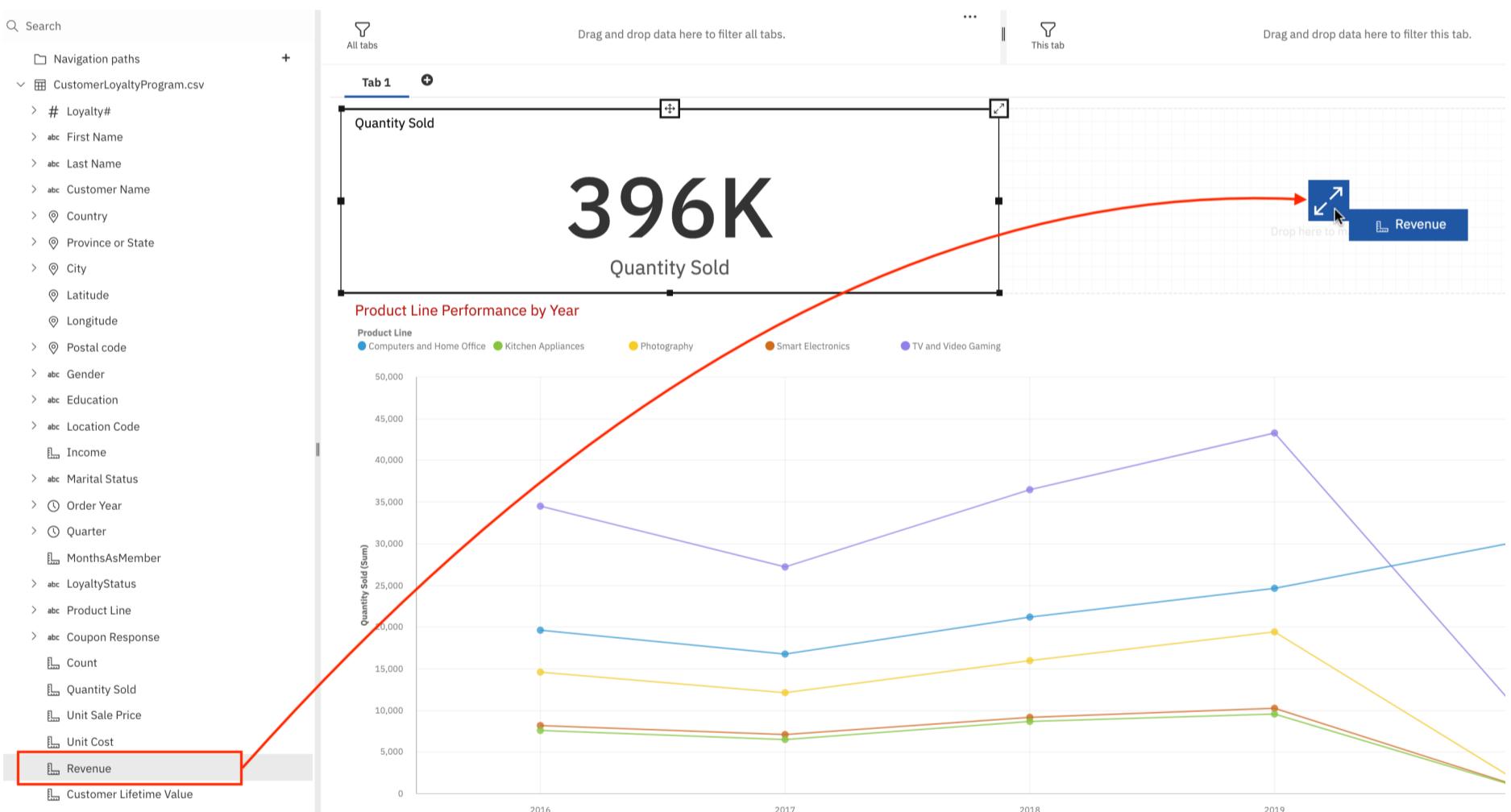


7. Click the **Color picker** icon, and change the color to **Red**, then click the font size drop-down and choose **18**.

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**.



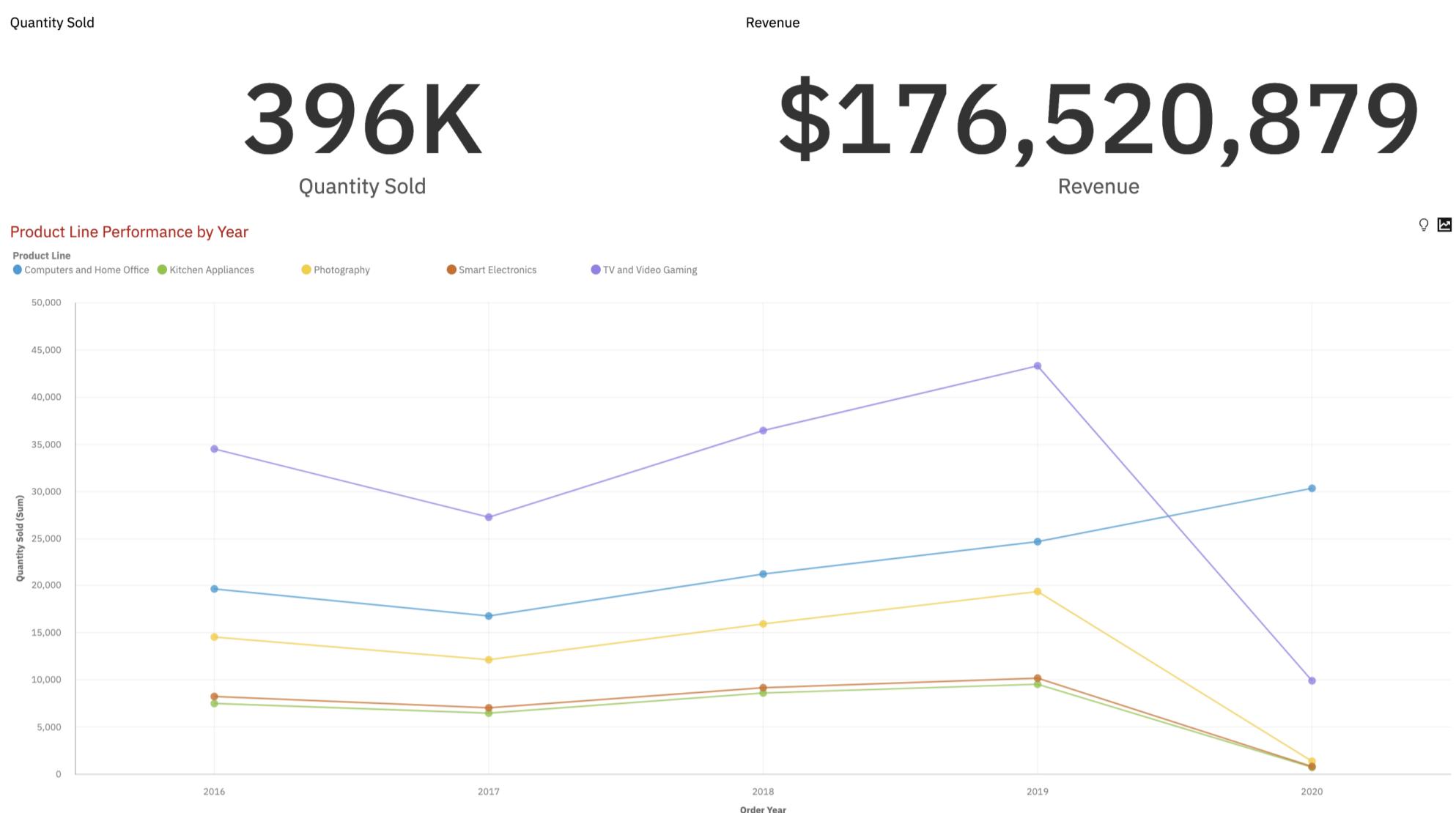
10. Click on the tab name **Tab 1** to bring up the Tab's on-demand toolbar. Select the **Edit** icon.



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)

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## Changelog

Date	Version	Changed by	Change Description
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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