



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.

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**.

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

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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

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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.

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

Products

Trials

1 Offering

Coursera on-line training - Data Visualizations

Active
Expires on Jan 24, 2021

Launch **Manage**

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.

Hello. Welcome to IBM Cognos Analytics.

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

Trial access **90 days left**

Upgrade **Manage my subscription**

Knowledge Center

IBM Cognos Analytics **IBM Cognos Analytics**

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. Repeat step 7 and 8.

Log in to IBM

IBMid [Forgot IBMID?](#)

@gmail.com

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.

IBM Cognos Analytics with Watson Application Toolbar Trial Countdown 79 Search Cognos Analytics ?

Maintenance Thank you for your patience. At this time the email service is now restored. We apologize for any inconvenience this has caused.

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.

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...

Present data

Create sophisticated, multi-page, multi-query dashboards, reports, or st...

Upload Dataset

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 with Watson Navigation Bar

- Home**
- + New** Creating new dashboard, data module.
- Upload files** To upload new files
- Content** To get the content, team content & samples.
- Recent** To get recent activities >
- 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**.

Products

Trials

1 Offering



IBM Cognos Analytics on Cloud - Trial

Active

Expires on Oct 16, 2020

Launch

Manage

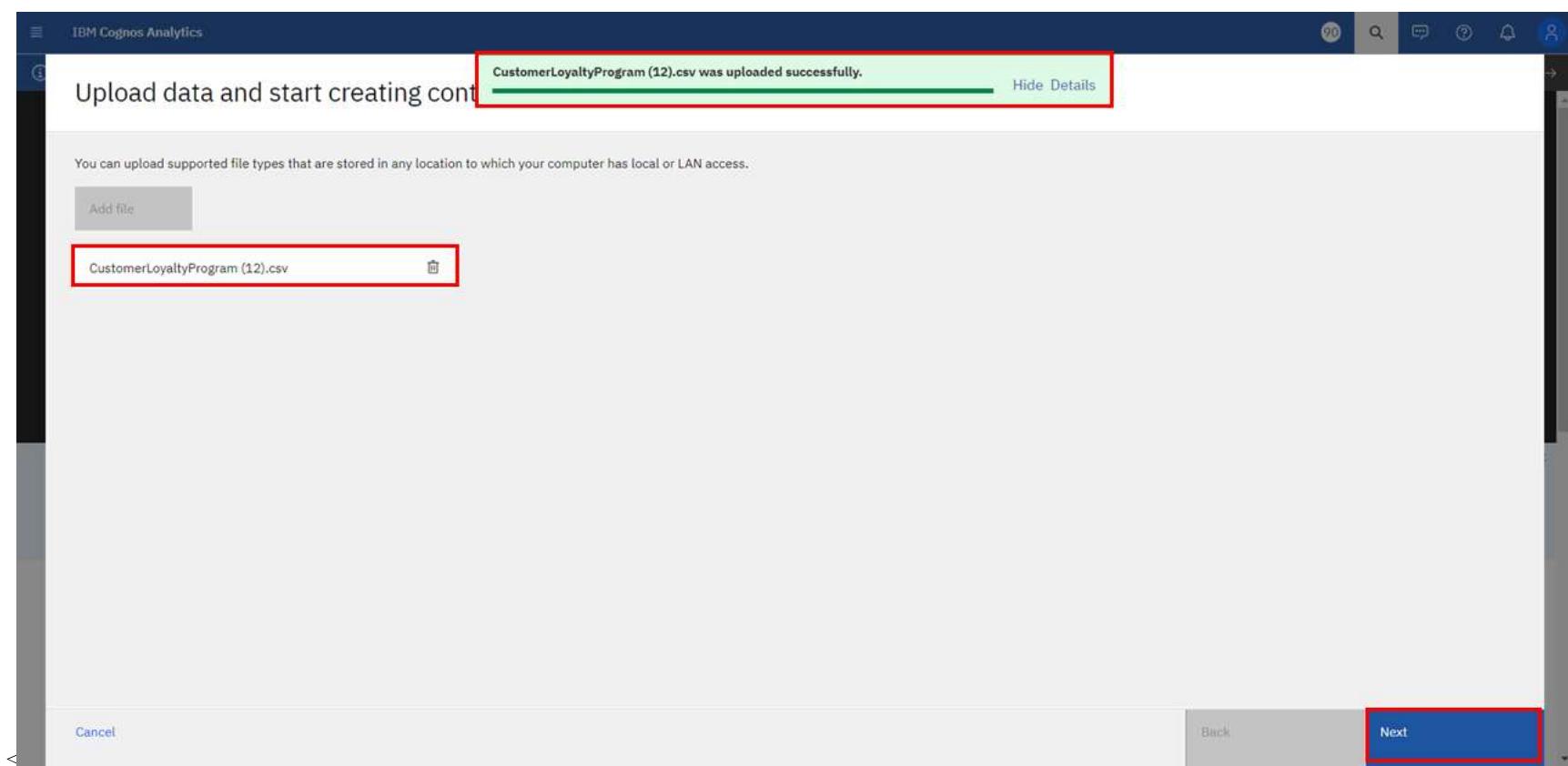
5. To upload a file, you may either drag and drop this file into the File Drop Zone (highlighted in the image above), or you may click **Upload files** at the bottom left corner to navigate to where the file is saved. For this lab, we will use the second option. Click **New > Upload files**.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a navigation bar with icons for search, notifications, and user profile. Below it, a dark header bar has the text "Get quick answers with the Assistant". Underneath, a sub-header says "Ask the Assistant a question in your own words to uncover insights about your data." On the right, there are two speech bubble icons: one purple with three dots and one white with a question mark. In the center, there's a large blue button labeled "Ask a question". Below this, a section titled "To upload the dataset" is visible. It contains two options: "Upload data and start creating content" (which is highlighted with a red box) and "Create content from existing data". Both sections have descriptive text and small icons. At the bottom of the screen, there are "Get started" and "Watch video" buttons.

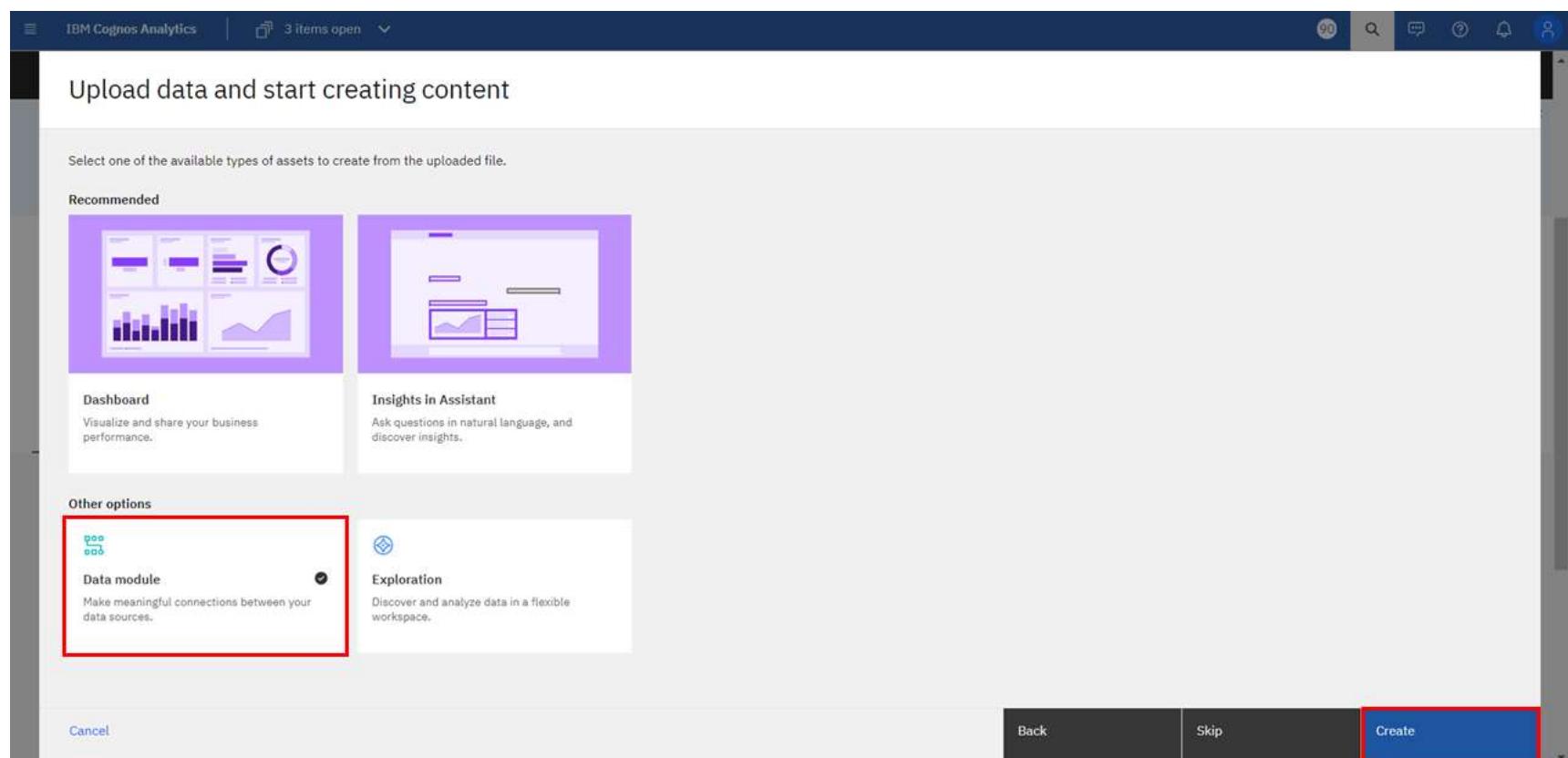
6. Click on Drag and drop file here or click to upload, updated new file browser window will open. Navigate to where the file is saved, select the file, and click Open.*.

This screenshot shows a modal dialog box titled "Upload data and start creating content". The main area contains the instruction "You can upload supported file types that are stored in any location to which your computer has local or LAN access." Below this is a red-bordered box with the text "Drag and drop file here or click to upload". At the bottom of the dialog, there's a link "Want to know more about uploading data? Learn more" and a footer with "Cancel", "Back", and "Next" buttons.

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.



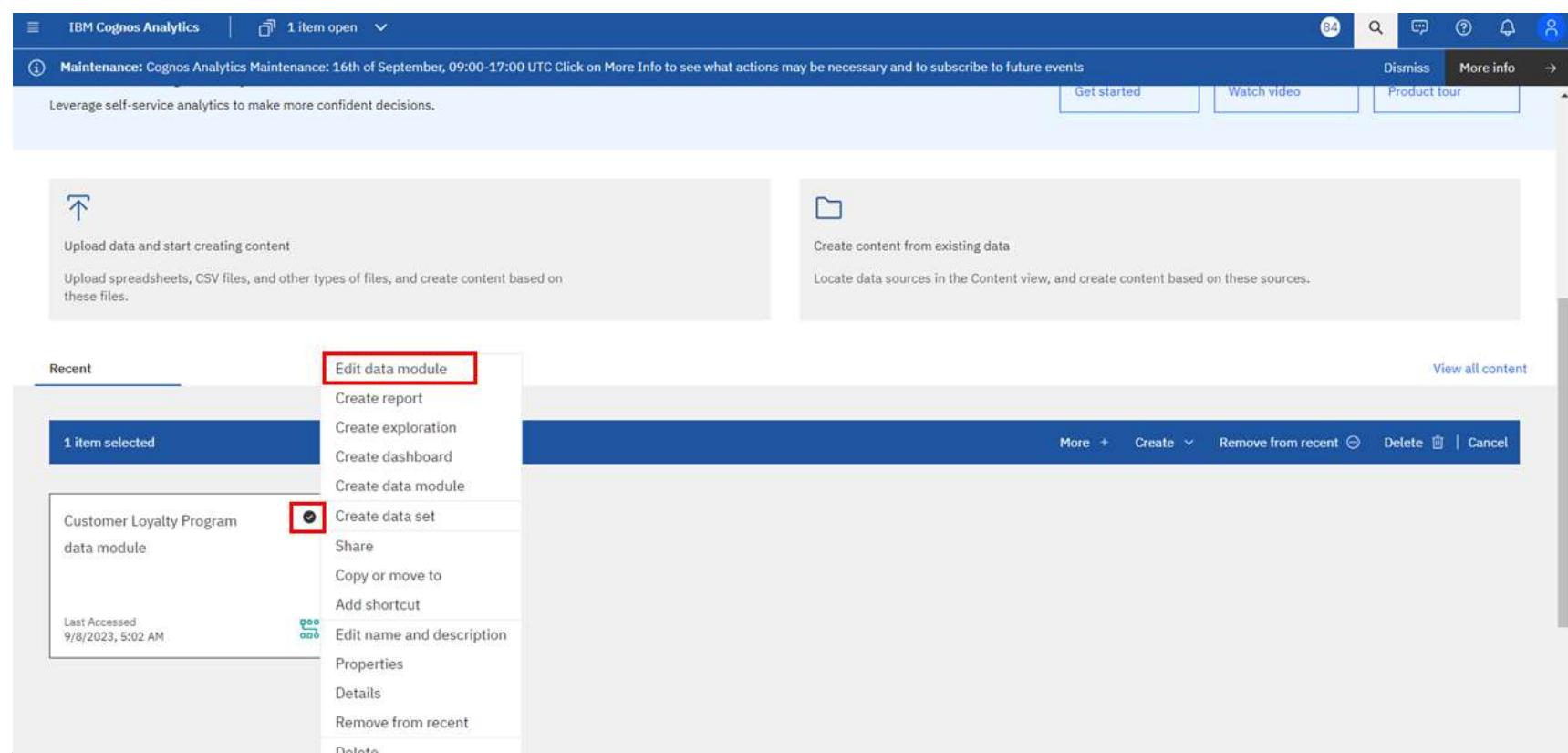
8. Convert the **CustomerLoyaltyProgram.csv** to **Data module** by selecting the **Data module** in **Other options** and click **Create**.



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**.



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. In the top navigation bar, there's a 'Data module' section with a '+' button and a 'Grid' tab selected. Below it, a search bar and a context menu are open. The context menu has a 'New' section with several options: 'Calculation...', 'Relationship...', 'Filter...', 'Folder', 'Table using SQL...', and 'Table...'. The 'Table...' option is highlighted with a red box. To the right of the menu, there's a circular icon with a grid and a checkmark, labeled 'Preview data' with the sub-instruction 'To preview data, select a table, a column in a table, or a folder that contains columns.'

3. 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.

This screenshot shows the 'Create table' dialog box. On the left, there's a 'Selected tables' section with a 'CustomerL...gram.csv' entry. Below it is a 'Select tables' section with a 'Select tables' button highlighted with a red box. The main area lists various table creation options like 'Alias of a table', 'Copy of a table', etc., each with a radio button. At the bottom, there are 'Cancel' and 'Next' buttons, with 'Next' highlighted with a red box.

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

This screenshot shows the 'Create a view of a table' dialog box. On the left, there's a 'Select items' section with a 'CustomerL...gram.csv' entry. The main area shows a preview table with columns: Row Id, Loyalty#, First Name, Last Name, Customer Name, Country, and Province. Below the preview is a 'Data will appear here' placeholder and a 'Refresh' button highlighted with a red box. At the bottom, there are 'Invert' and 'Clear all' buttons, followed by 'Previous', 'Cancel', and 'Finish' buttons, with 'Finish' highlighted with a red box.

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	Pr
<input type="checkbox"/> Find	1	837810	Abigail	Goris	Abigail Goris	Canada	
<input checked="" type="checkbox"/> CustomerLoyaltyProgram.csv	2	707928	Ada	Glaude	Ada Glaude	Germany	
	3	901442	Ada	Staback	Ada Staback	Canada	
	4	237303	Adam	Boner	Adam Boner	Canada	
	5	346835	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	Caravalho	Akilah Caravalho	Germany	
	12	747903	Al	Johnson	Al Johnson	United States	

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. In the top navigation bar, there is a 'Save' button highlighted with a red box. Below it, the 'Data module' tab is selected. On the left, there is a tree view of data sources. Under 'CustomerL...ogram.csv', the 'CustomerL...View (1)' item is highlighted with a red box. On the right, there is another tree view showing 'CustomerL...- View (1)' which also has a red box around it. The interface has a dark theme with various icons and buttons.

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. It has a 'Name' field containing 'Customer Loyalty Program data module' with a red box around it. Below it, a 'Selected destination' dropdown is set to 'My content' with a red box around it. There are two tabs: 'My content' (selected) and 'Team content'. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with a red 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. The left sidebar has a red box around the 'Content' tab. The main area shows a list of items under 'Customer LoyaltyProgram.csv - View (1)'. The top navigation bar includes tabs for 'Grid', 'Relationships', and 'Custom tables', with 'Custom tables' being the active tab. The status bar at the bottom right shows 'about:blank'.

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 selected in the navigation bar. The 'My content' tab is highlighted with a red box. In the main area, there is a card for 'Customer Loyalty Program data module' which is also highlighted with a red box. Other items listed include 'CustomerLoyaltyProgram.csv', 'Newdash', and 'popular-language (4).csv'. The top right corner of the interface shows a search bar and user profile icons.

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**.

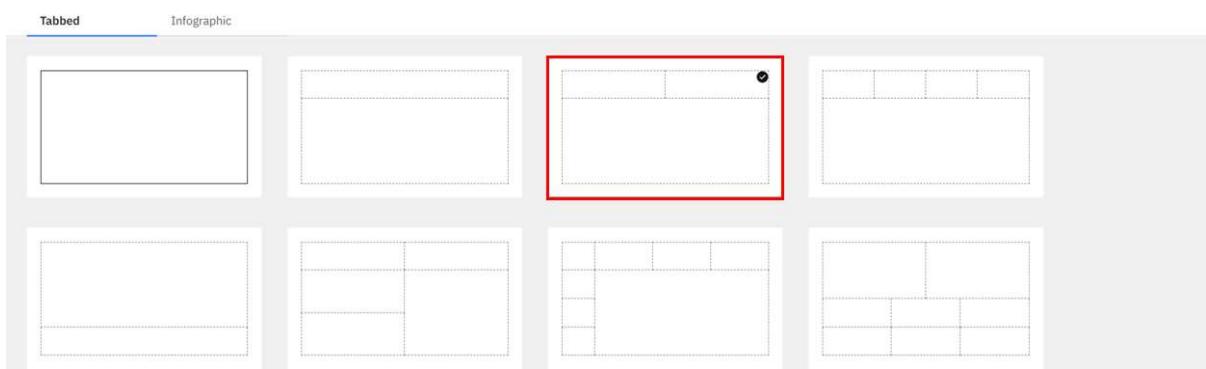
The screenshot shows the 'Recent' tab selected in the template window. A card for 'CustomerLoyaltyProg...' is highlighted with a red box. Below it, the text 'Last Modified 6/7/2021, 1:56 AM' and a 'CSV' download icon are visible. The top left of the window shows 'Get started' and 'Recent' tabs.

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](#)



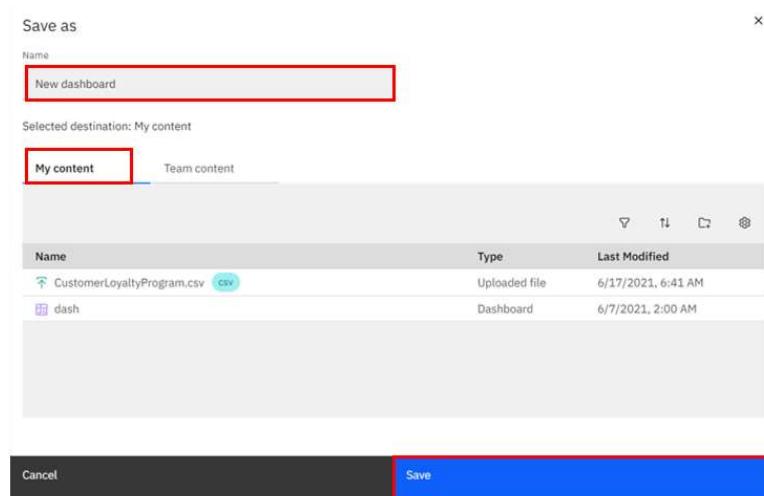
3. Now you have created a new dashboard using the dashboard template.

Navigation Panel with Dashboard Toolbox

Data Source Panel

Dashboard Template

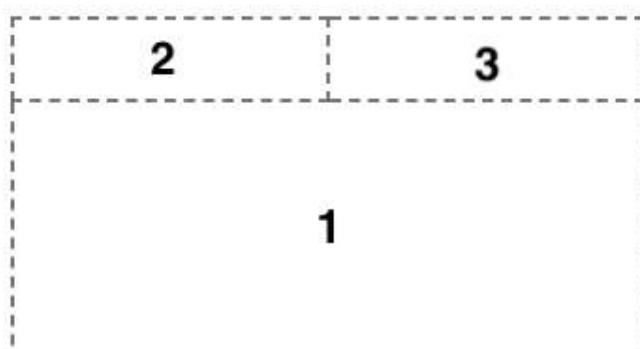
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



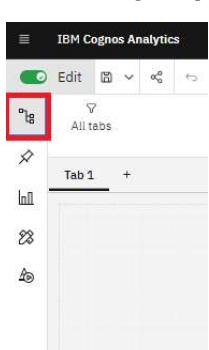
Task D: Create a Simple Dashboard

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.

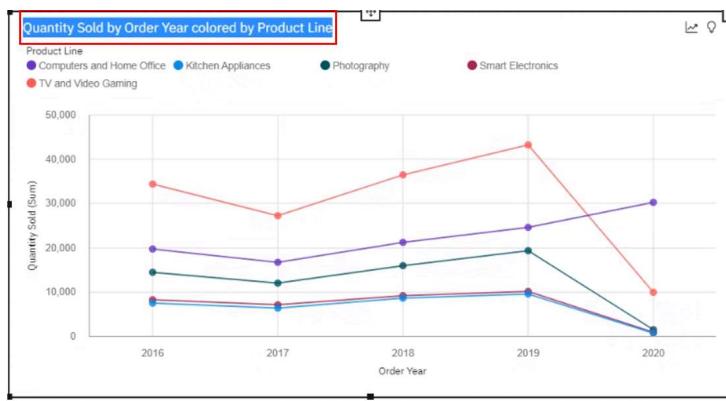


3. From the **Data Source** panel, press **CTRL** and select **Order Year**, **Quantity Sold**, **Product Line** and drag it to the center of **Panel 1**, releasing them once you see the **drop zone turn blue**.

The screenshot shows the Data Source panel on the left with several items listed. Three items are highlighted with red boxes: "Order Year", "Product Line", and "Quantity Sold". Red arrows point from these highlighted items towards a blue rectangular area in the center labeled "Drop here to move".

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.

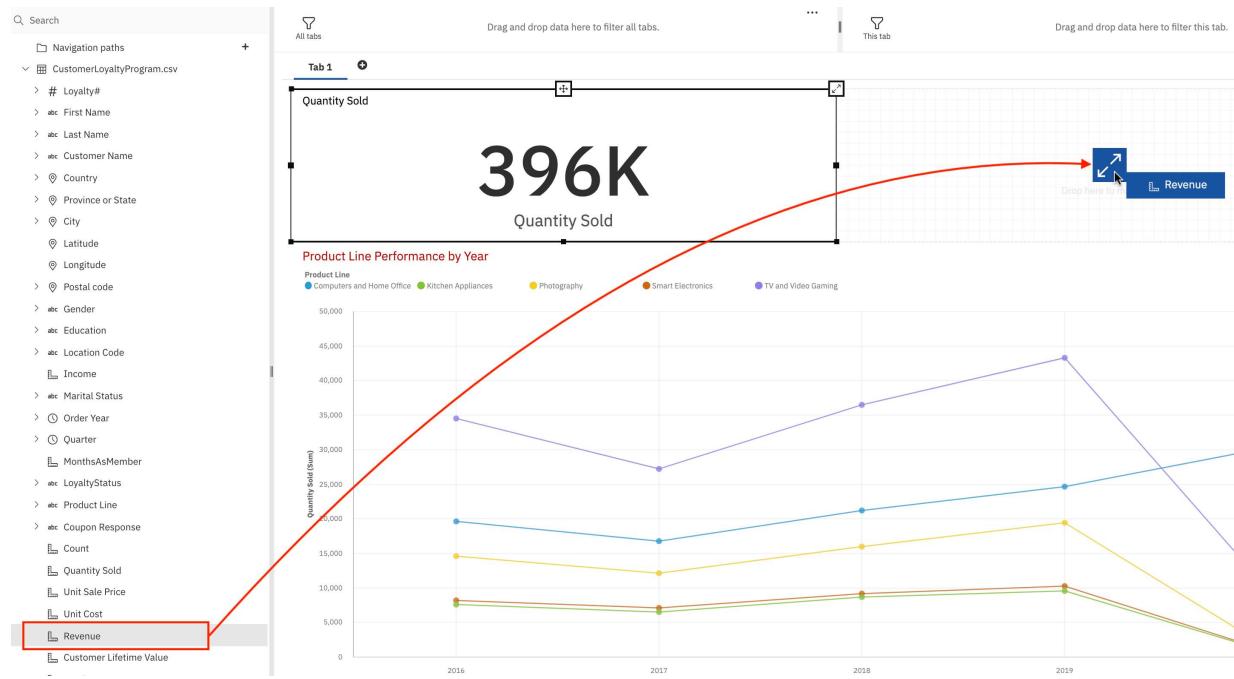
The screenshot shows the Title On-demand Toolbar with the title "IBM Plex" highlighted by a red box. The toolbar includes icons for font style (A), font size (16), and font color (Red).

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

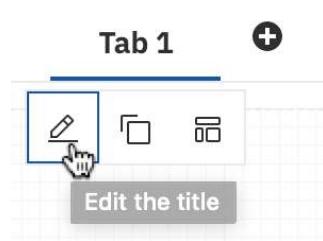
8. From the **Data Source** panel, select **Quantity Sold** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone turn blue**.

The screenshot shows the Data Source panel with "Quantity Sold" selected and highlighted by a red box. A red arrow points from "Quantity Sold" towards a blue rectangular area in the center labeled "Drop here to move".

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**.

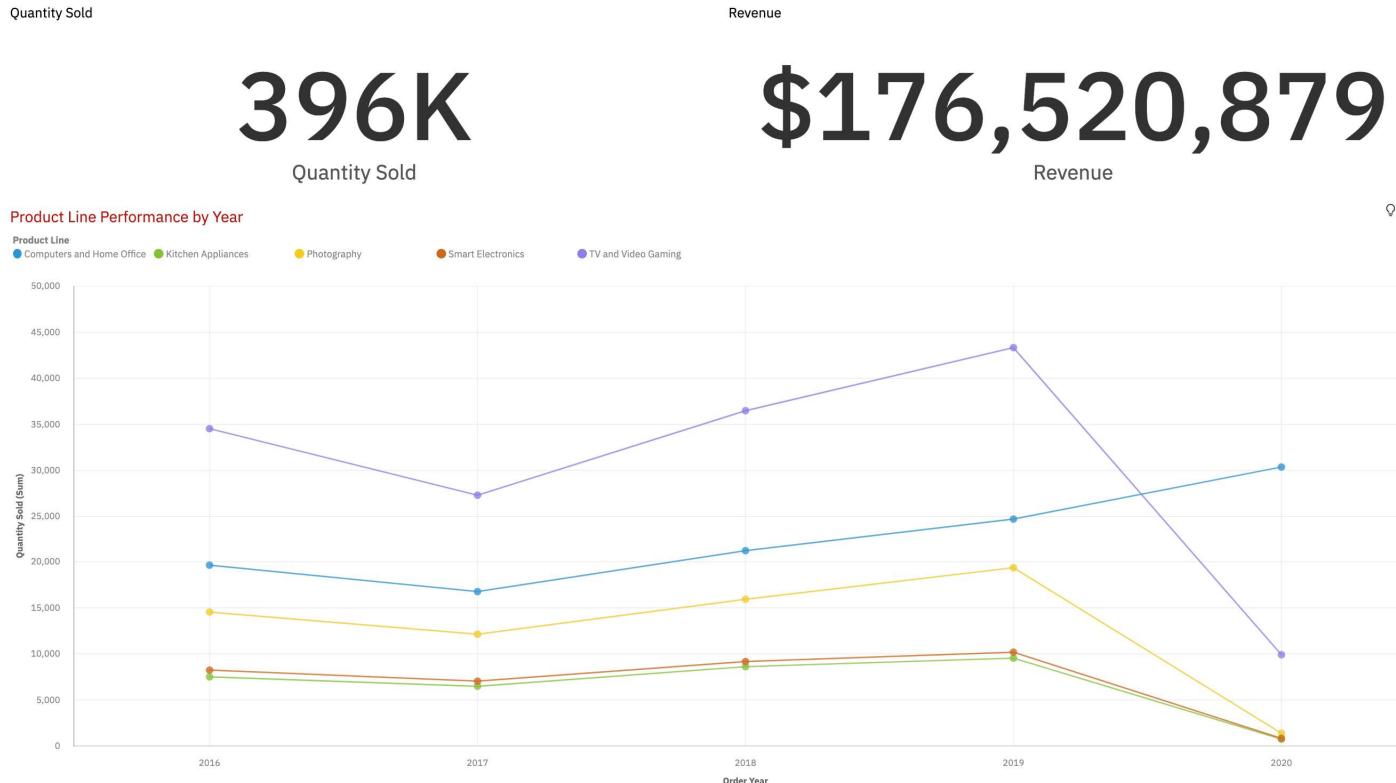


10. Click on the tab name **Tab 1** to bring up the Tab on-demand toolbar. Select the **Edit** icon.



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

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