



## 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.

# IBM Cognos Analytics

Introducing Cognos Analytics 12. Make better decisions, faster, with AI-powered insights for everyone.

[Start free for 30 days →](#)[Request a live demo →](#)[Let's talk](#)

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

@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](#)

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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



## 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.

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Changes since the previous version of this notice	▼
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What data does IBM collect?	▼
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Why IBM needs your data	▼
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How your data was obtained	▼
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How IBM uses your data	▼
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How IBM protects your data	▼
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How long we keep your data	▼
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Your rights	▼
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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/](https://myibm.ibm.com/dashboard/) automatically. Wait for a few moments until the Coursera on-line training - Data Visualizations trial offering becomes active.



**My IBM**

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# Products

## Trials

1 Offering



### **Coursera on-line training - Data Visualizations**

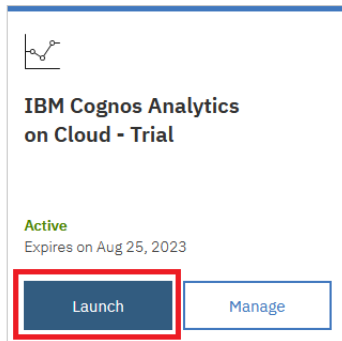
Activation in progress

[View support information](#)

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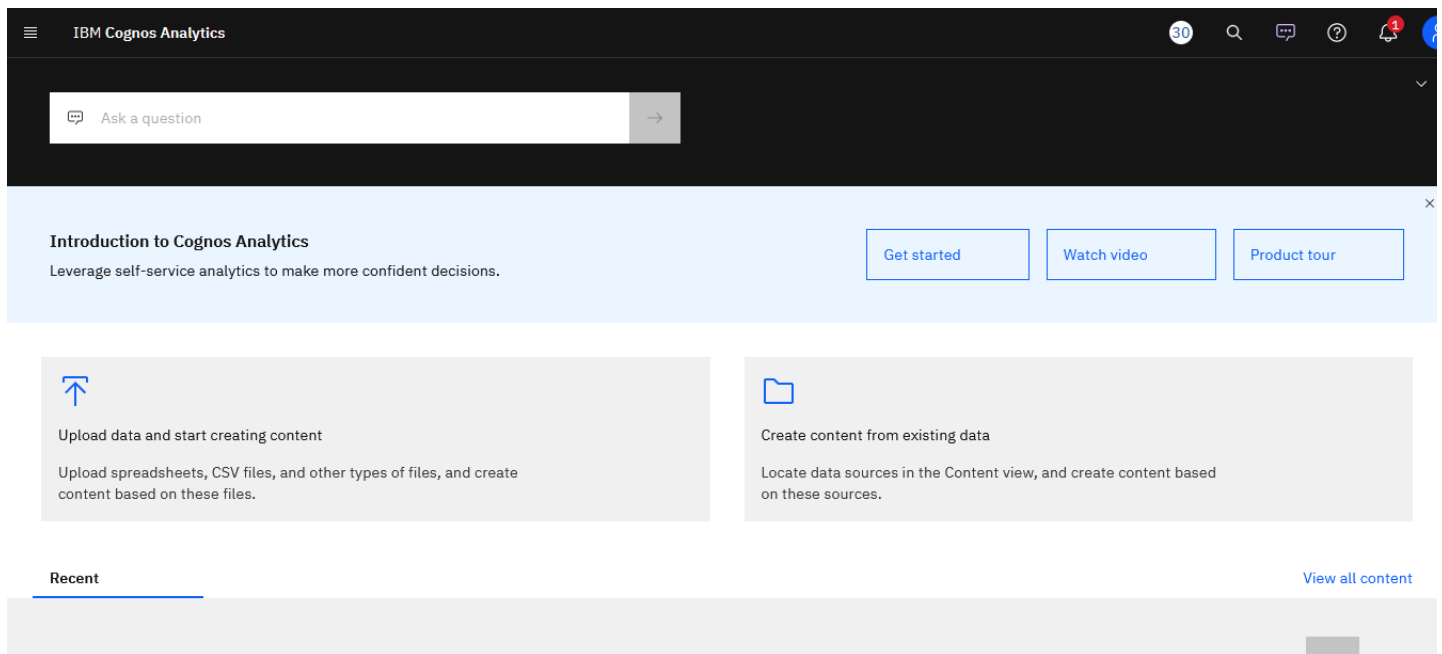
7. Click the **Launch** button for this offering.



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.



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 and then repeat steps 7 and 8.

# Log in to IBM

IBMid

[Forgot IBMid?](#)

☒ Remember Me [i](#)

Continue



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

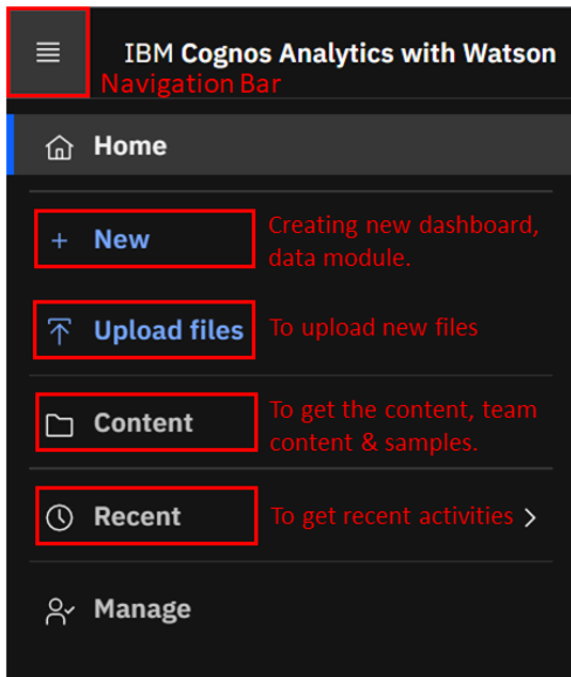
## Exercise 2: Navigate around the Cognos Analytics UI

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.

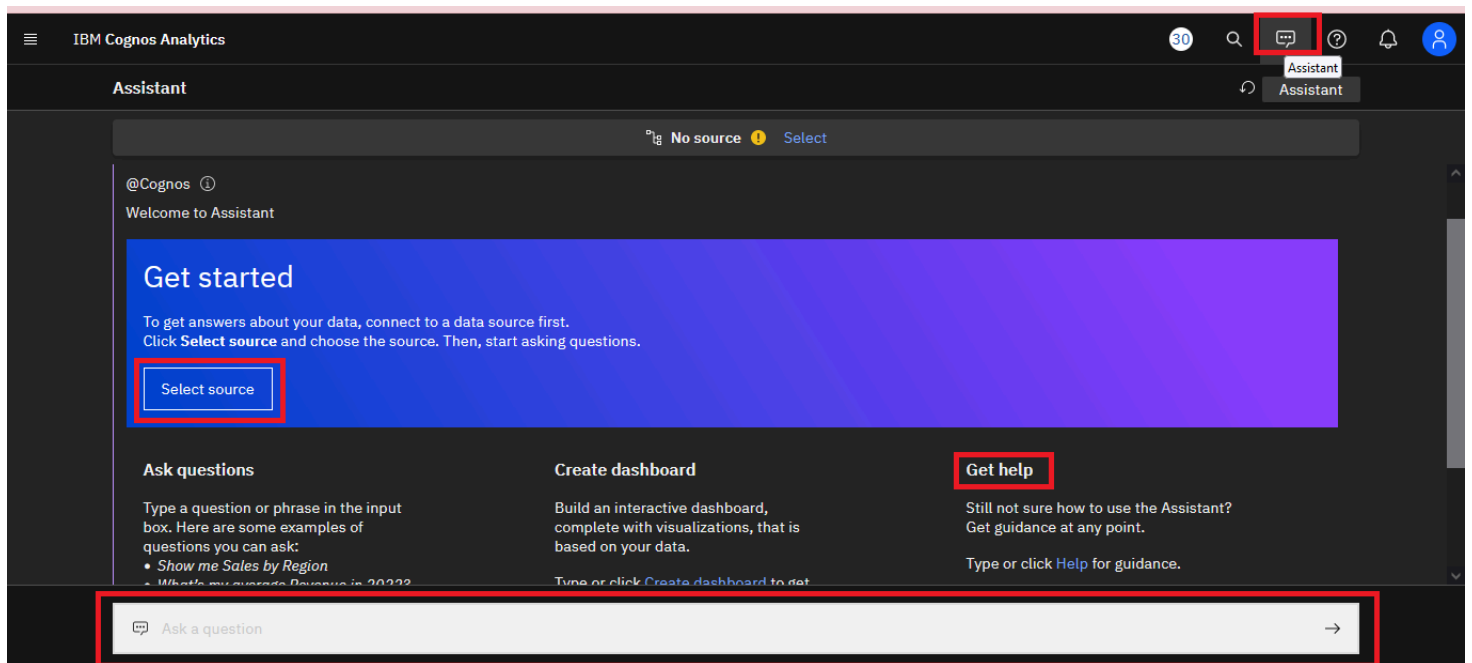
2. Click the **Navigation Bar**, you can use **New** to create new items, you can use **Upload data** to upload your external data files, the **Content** section is where you can create new content or open different samples to work with, and the **Recent** section shows any recently used files you've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



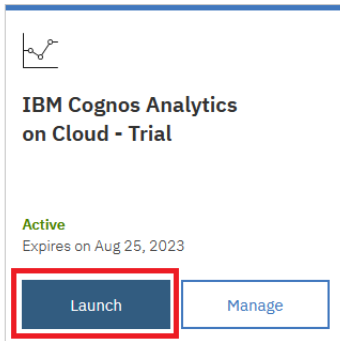
## Exercise 3: Create a Simple Dashboard with Cognos Analytics

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.

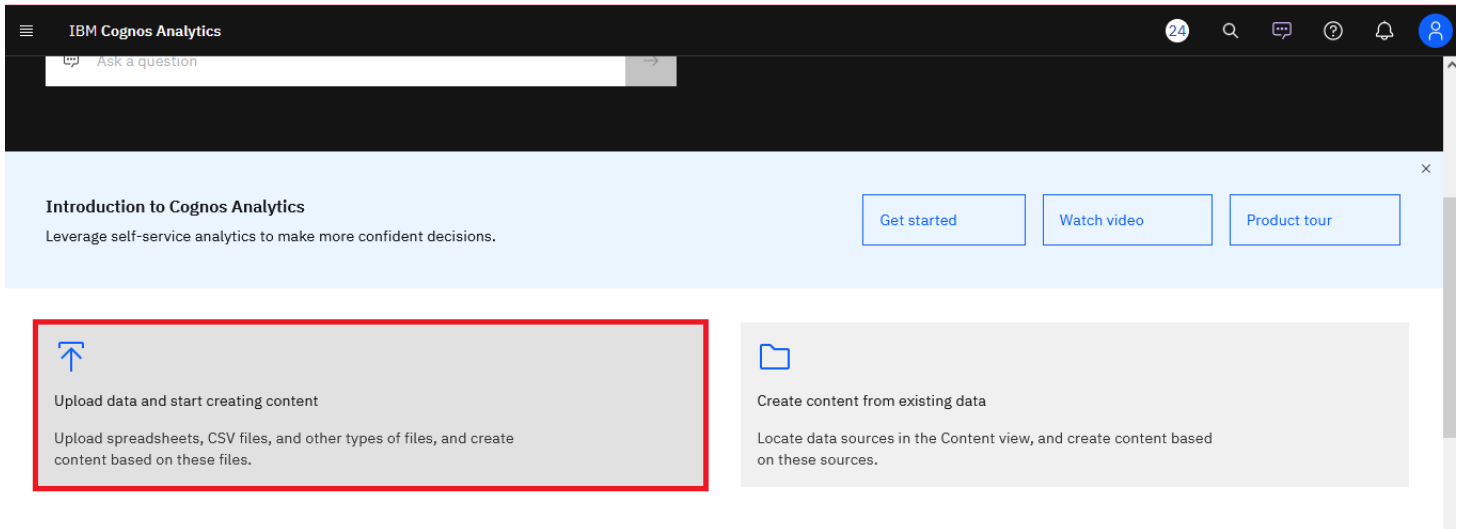
### Task A: Upload External Data Files

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

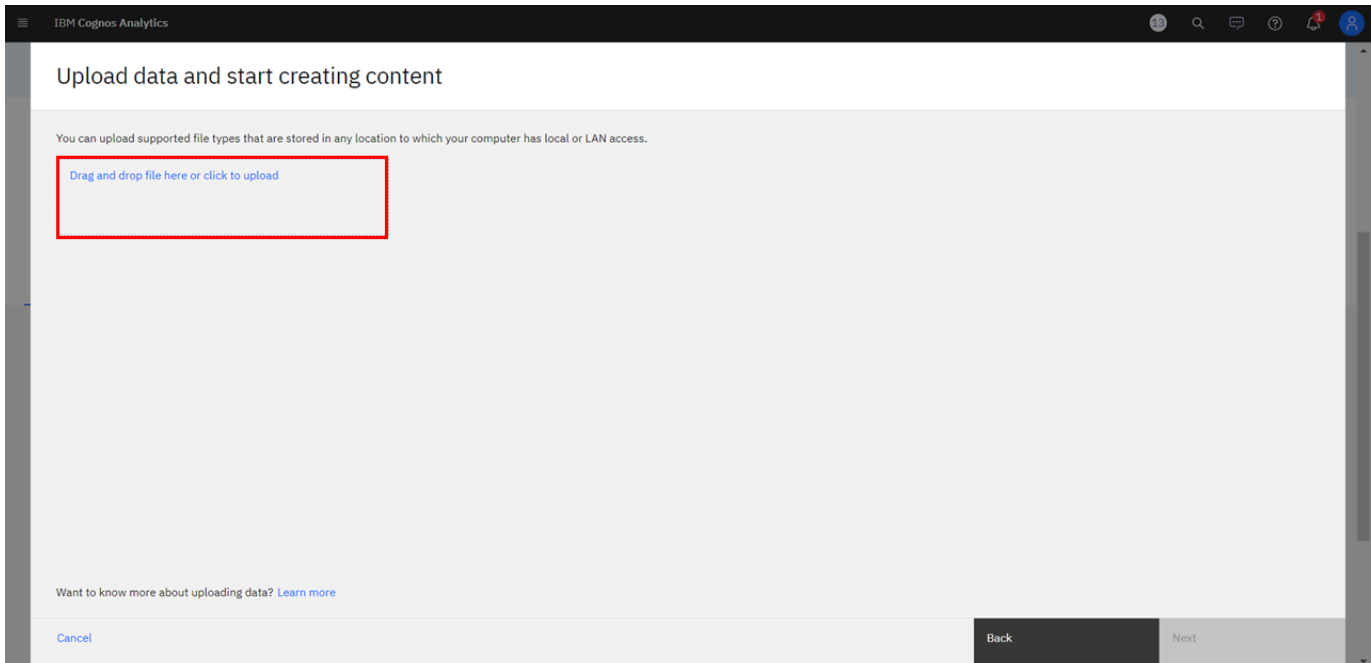
1. Download the file [CustomerLoyaltyProgram.csv](#).
2. If you are not currently signed in, sign in to the Cognos Analytics platform with your IBMid, by navigating to [myibm.ibm.com/dashboard/](https://myibm.ibm.com/dashboard/).
3. Enter your IBMid and password, then scroll down and click **Launch**.



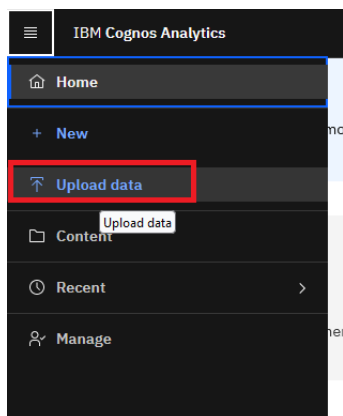
4. To upload a file, click the **Upload data and start creating content** link.



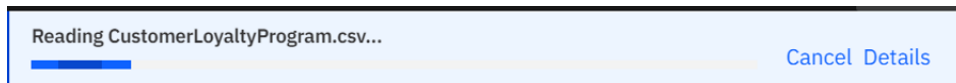
5. Click on **Drag and drop file here or click to upload**, a updated new file browser window will open. Navigate to where the file is saved, select the file, and click **Open**.



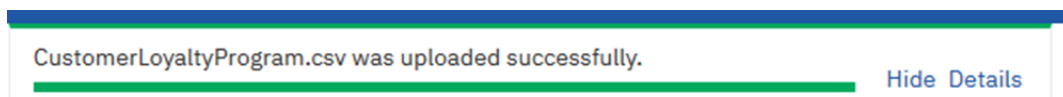
6. Alternatively, from the menu, click **Upload data**.



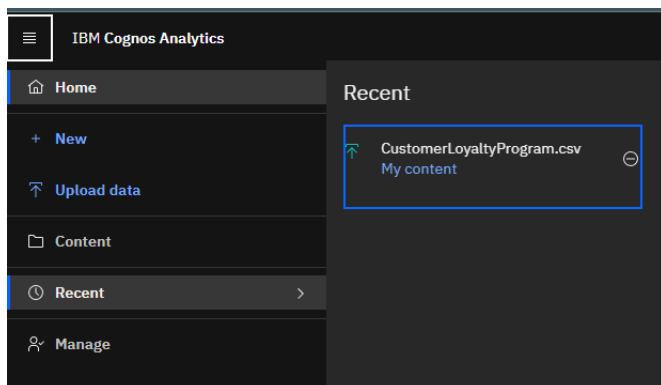
7. As the file uploads, notice that a series of status bars will be visible as the upload process reads and analyzes the data being brought in.



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



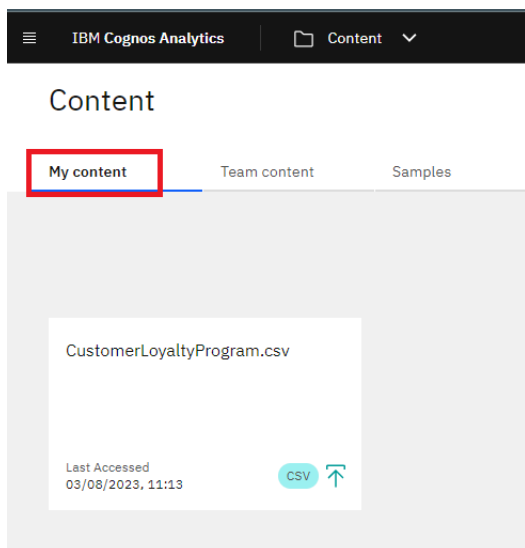
9. In the **Recent** section, you will see the new uploaded data file.



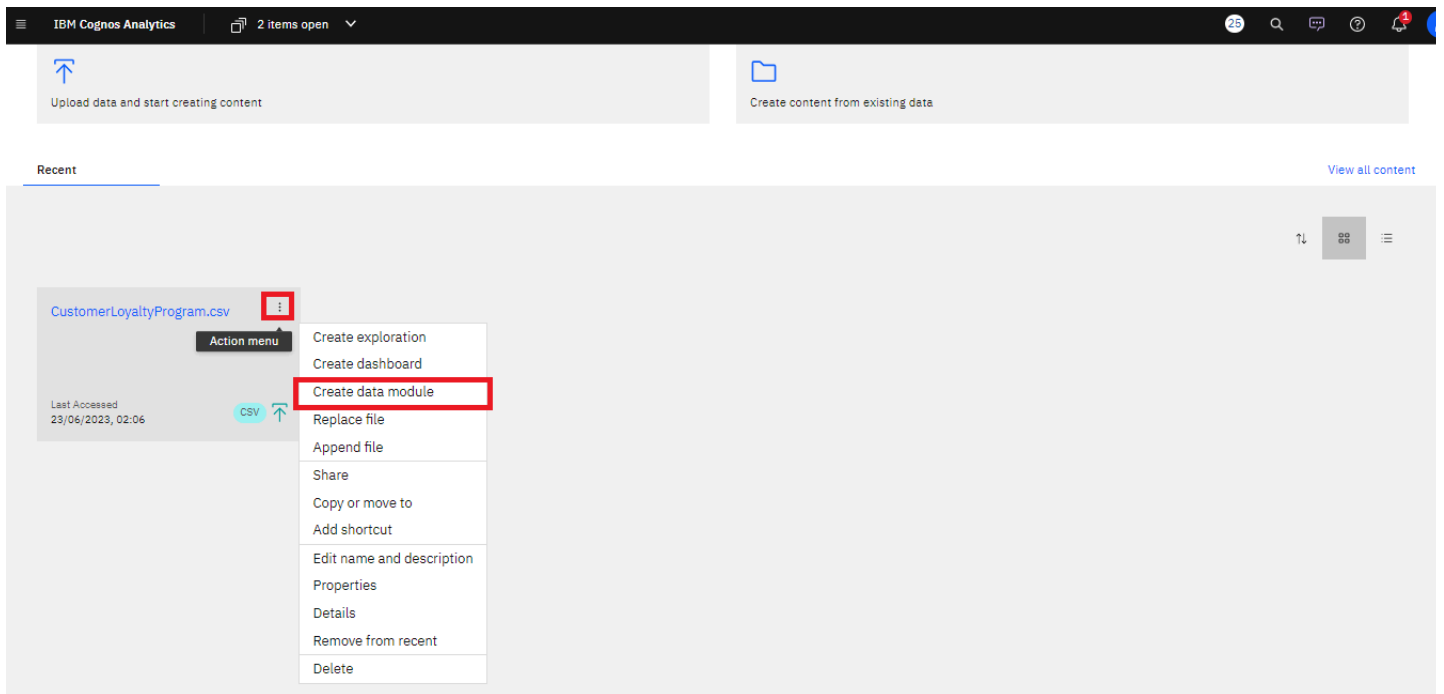
## Task B: Convert the uploaded CSV file into Data Module and view the table on IBM Cognos.

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

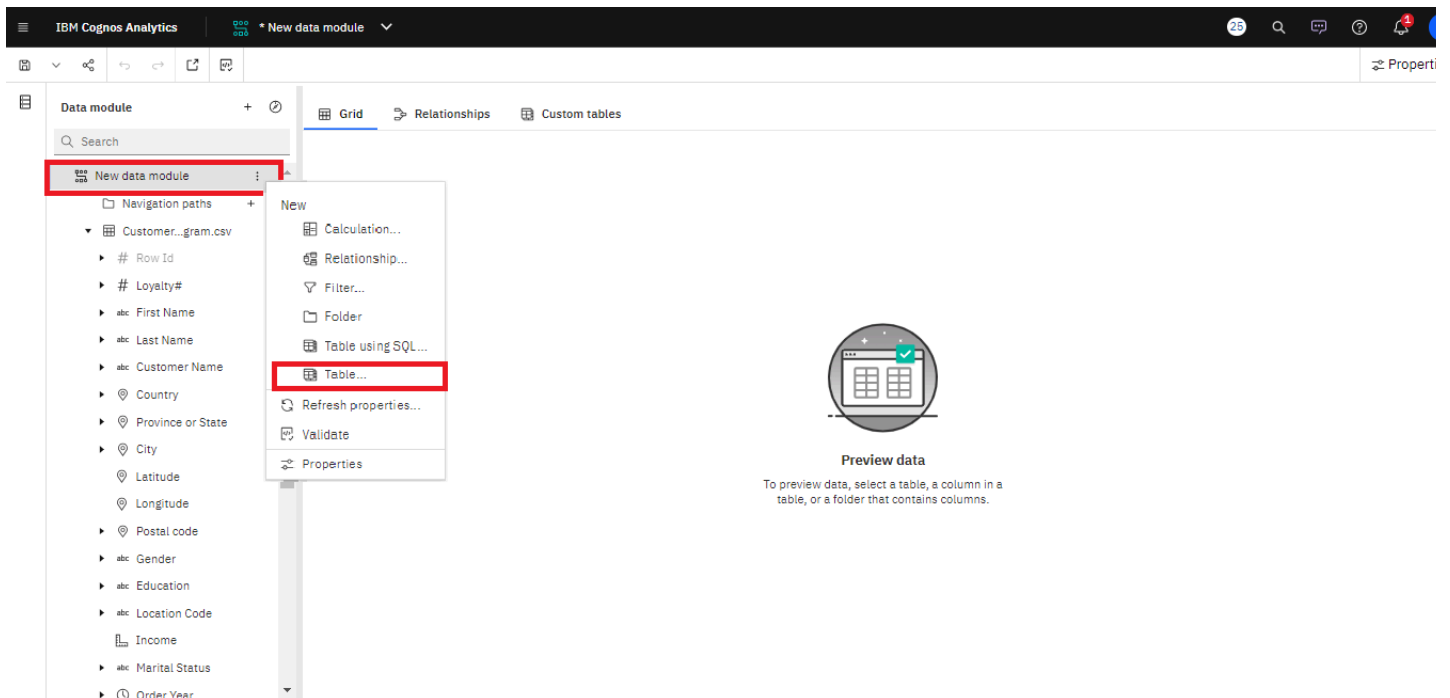
1. In the menu, click **Content**, then select the **My content** tab.



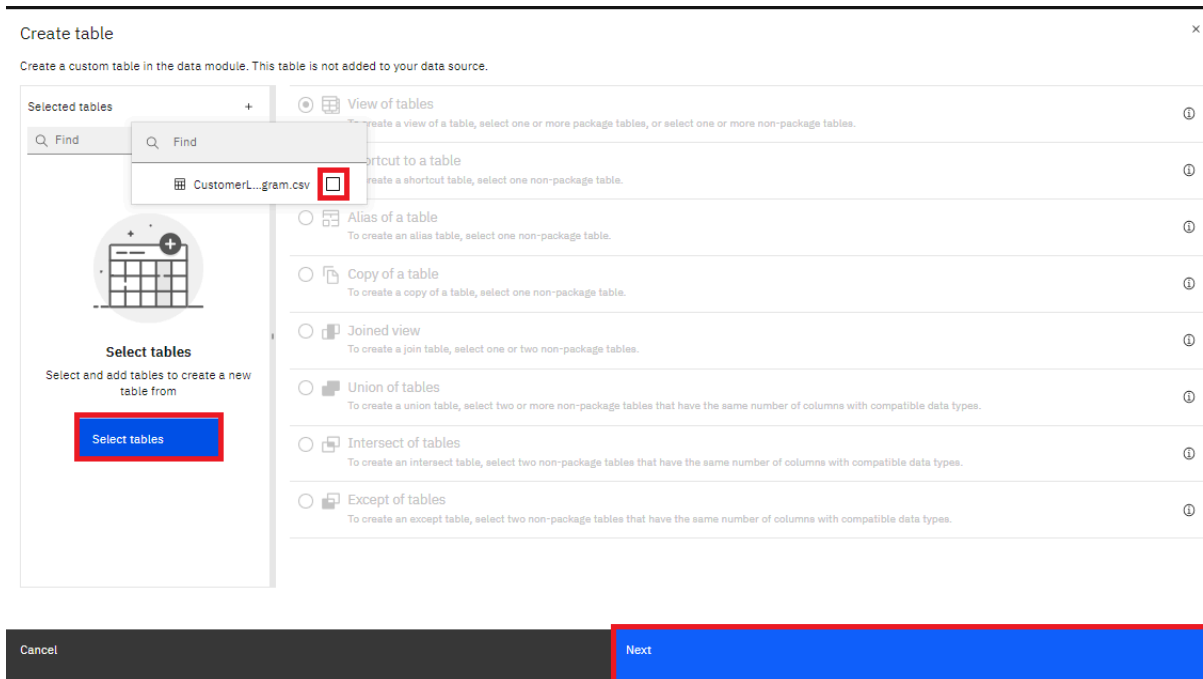
2. Click the **Action Menu** (represented by three dots) to the right of the *CustomerLoyaltyProgram.csv* file, and then click **Create data module**.



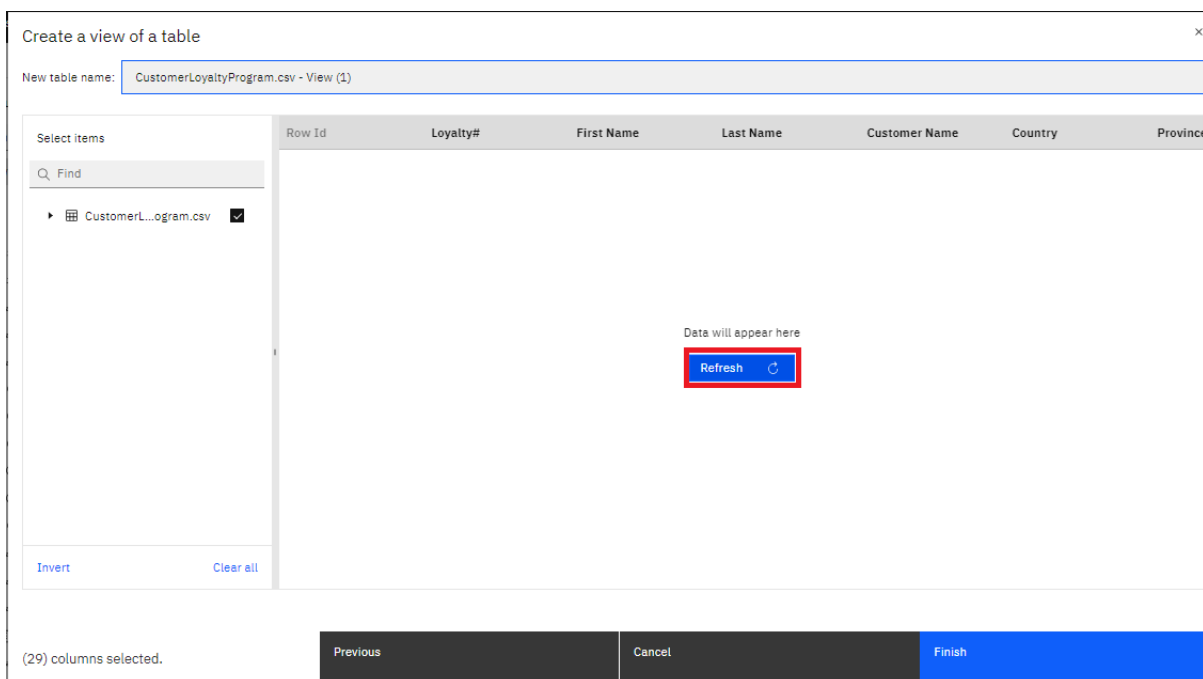
3. Click the **Action Menu** (represented by three dots) to the right of **New data Module**, and click the **Table** option to launch the **Create table** window.



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.



5. In the **Create a view of a table** window, click the **Refresh** button to view the data.



6. Now, you will be able to view the data in the table. Click **Finish**.

## 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
Q Find	1	837810	Abigail	Goris	Abigail Goris	Canada	
▶ CustomerL...ogram.csv	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**.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a header bar with 'IBM Cognos Analytics' and a 'New data module' dropdown. Below the header, there's a toolbar with various icons. A 'Save' button is highlighted in the toolbar. The main area is divided into two panels. The left panel, titled 'Data module', contains a search bar and a list of data modules. The right panel, titled 'CustomerLoyaltyProgram.csv - View (1)', shows a grid view of the data. In the 'Data module' list, the 'CustomerLoyaltyProgram.csv - View (1)' entry is highlighted with a red box. The grid view shows columns for Row Id, Loyalty#, First Name, Last Name, Customer Name, and Country, with data rows for each customer.

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.

Save as

Name

Customer Loyalty Program data module

Selected destination: My content

My content

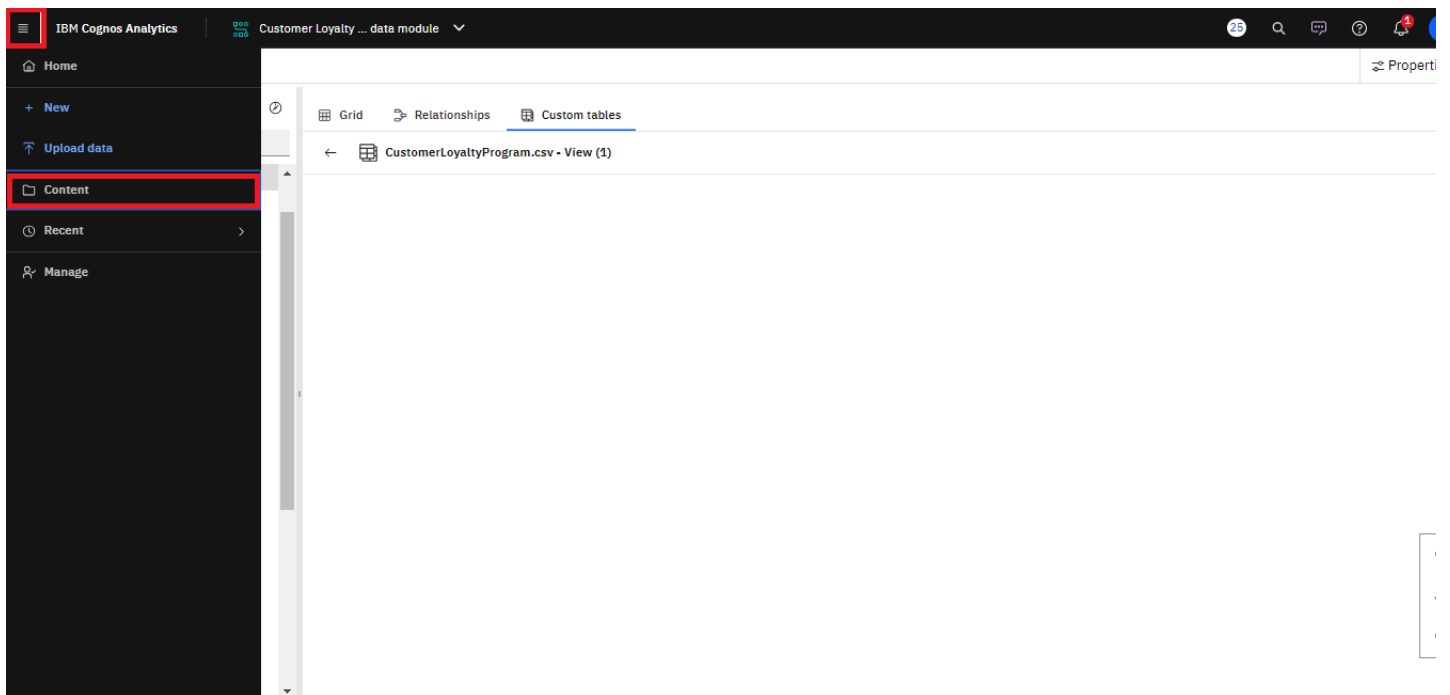
Team content

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

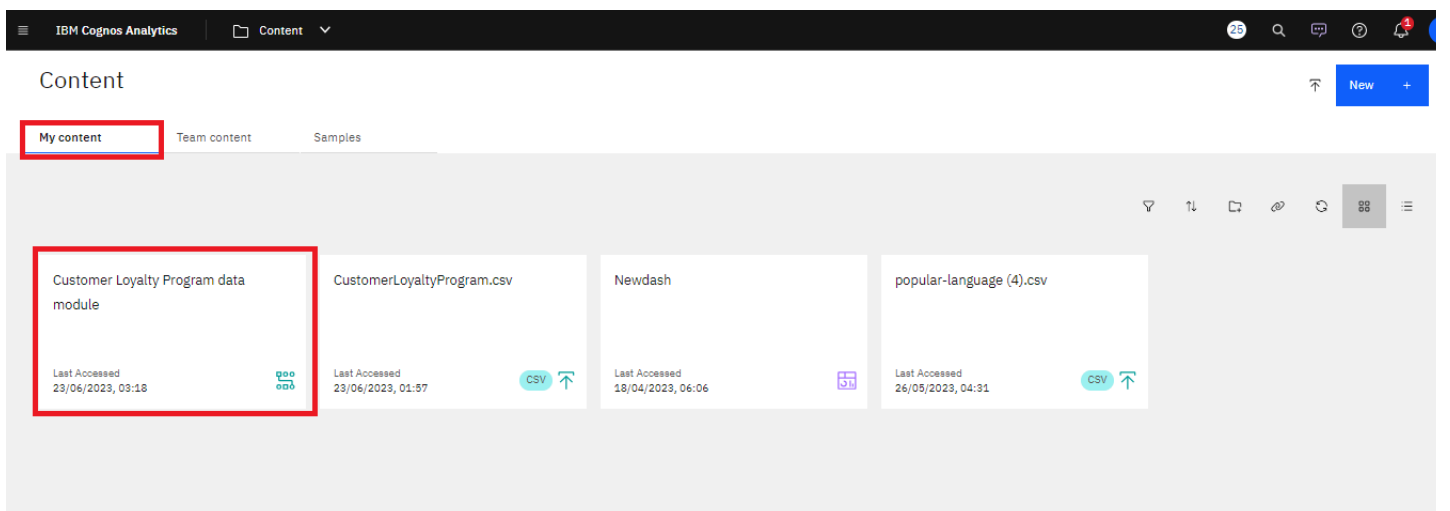
Cancel

Save

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



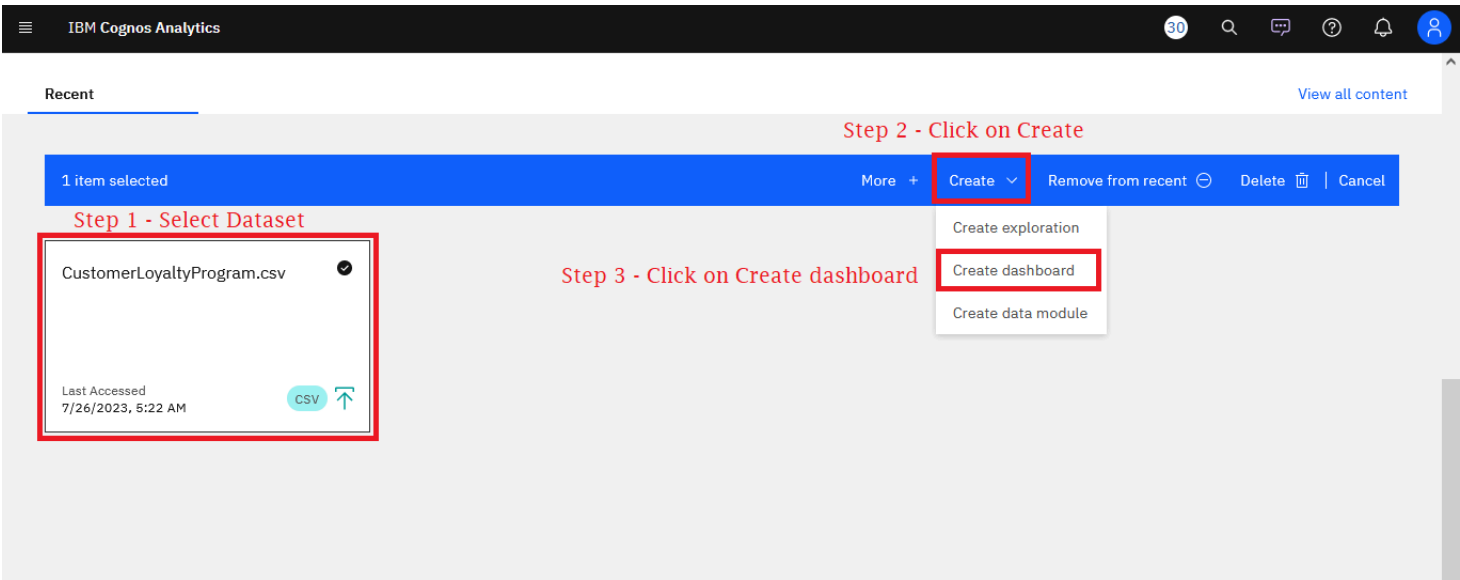
10. You will now see the new **Customer Loyalty Program data module** under the **My Content** tab.



Task C: Start a New Dashboard with Templates

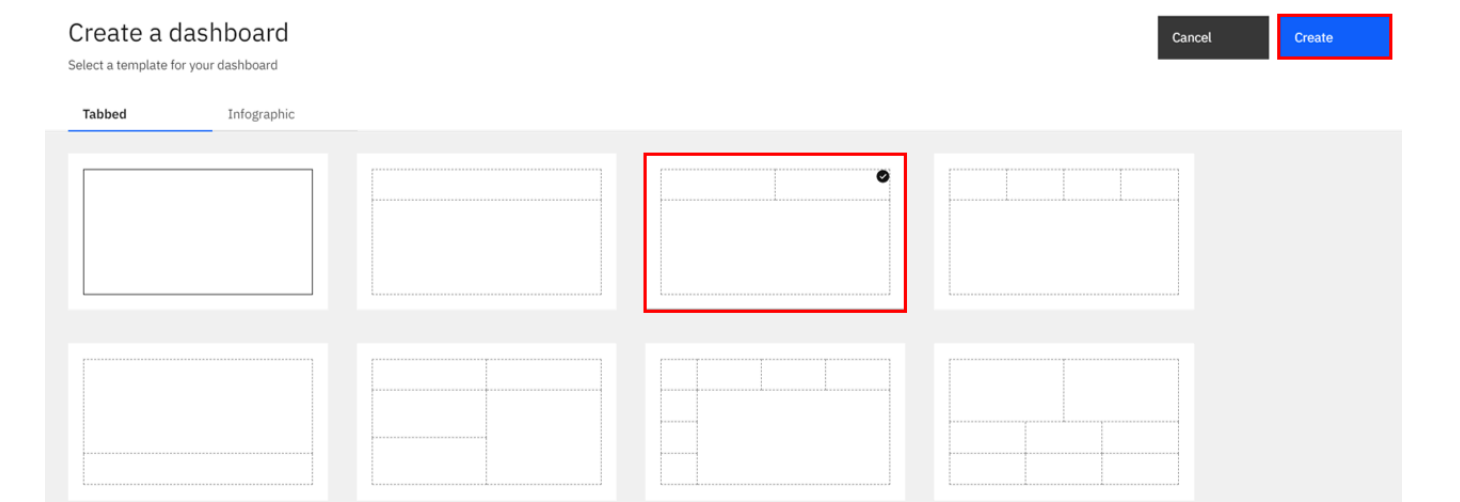
In this task, you will learn how to start a new dashboard with templates.

- 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**.



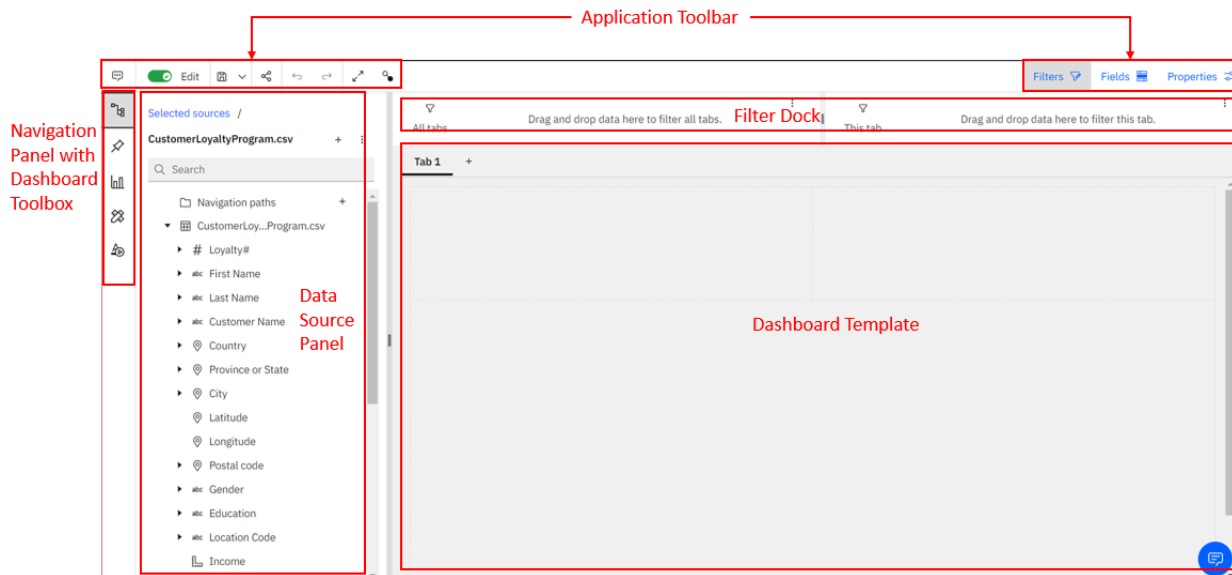
The *Create a dashboard* window will display, allowing you to select the type of dashboard and the template style.

- 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

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

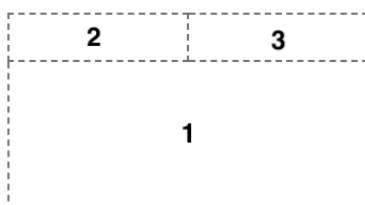
Cancel

Save

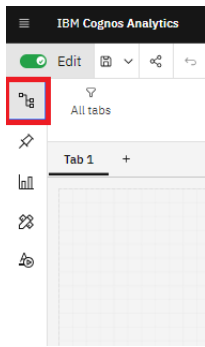
## Task D: Create a Simple Dashboard

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.

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

Drag and drop data he

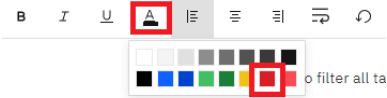
Tab 1



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*.





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 square turn blue.

Search

Navigation paths

CustomerLoyaltyProgram.csv

- Loyalty#
- First Name
- Last Name
- 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

All tabs

Tab 1

Drag and drop data here

Product Line Performance by Year

Product Line

- Computers and Home Office
- Kitchen Appliances
- Photograph

Quantity Sold (Sum)

50,000	
45,000	
40,000	
35,000	
30,000	
25,000	
20,000	
15,000	
10,000	

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



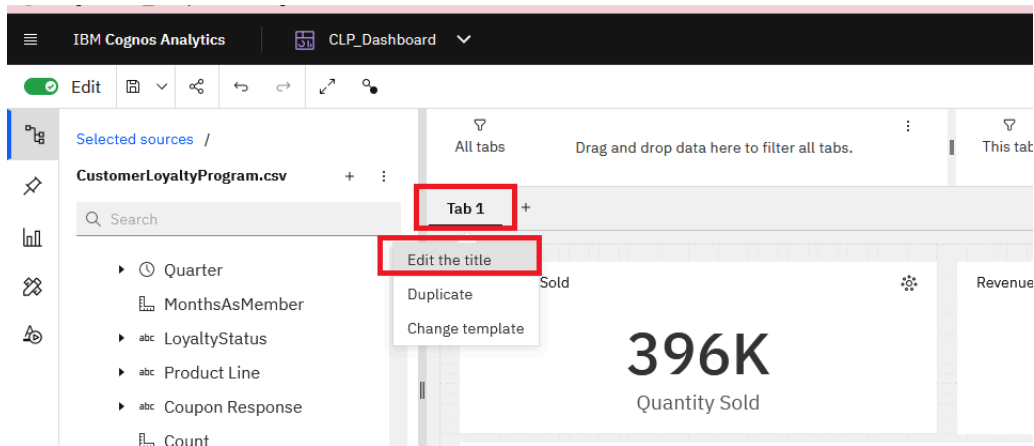
All tabs

Drag and drop data he

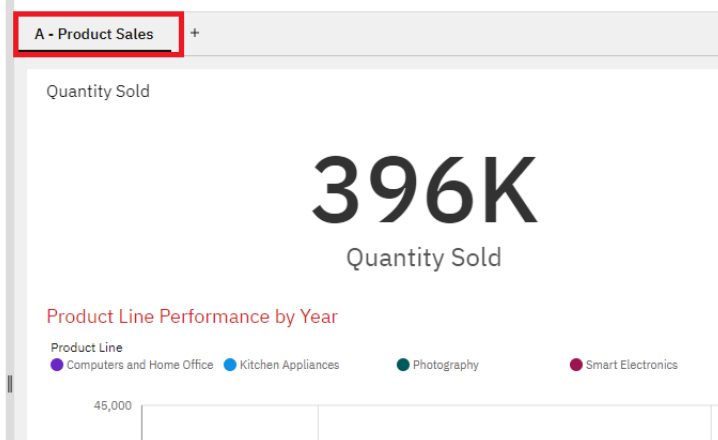
Tab 1



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

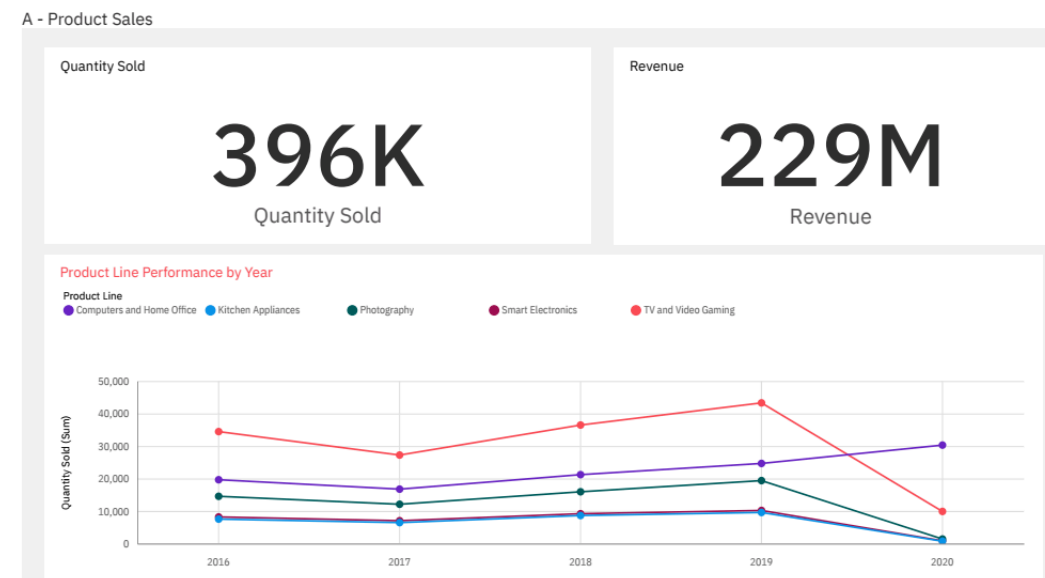


11. Rename the tab to **A - Product Sales**.



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)

- [Steve Ryan](#)
- [Dr. Pooja](#)

