



## 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.

The screenshot shows the IBM On-line training - Data Visualizations - Trial page. At the top right, there is a link to 'Log in' with a red arrow pointing to it. Below this, a section titled 'Start your free trial' contains a heading '1. Account information'. It includes fields for 'E-mail' (with a placeholder 'redacted@gmail.com'), 'First name' (Sandip Saha), 'Last name' (Joy), 'Password' (\*\*\*\*\*), and dropdowns for 'Country or region of residence' (Canada) and 'State or province' (Ontario). A 'Next' button is at the bottom.

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**.

This screenshot shows the '2. Additional information' step. It includes a question 'Are you a student? (optional)' with radio buttons ('Yes' checked, 'No') and a dropdown for 'Select Data Center (optional)' containing 'US East (Washington DC)'. A 'Next' button is at the bottom.

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](#)

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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.

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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](#)

Search [IBMid: \[REDACTED\]@gmail.com](#)

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1 Offering

Coursera on-line training - Data Visualizations

Activation in progress

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United States - English

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

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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.

**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 its disparate 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 video...

**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 we 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 →

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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 [?](#)

**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.

- 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

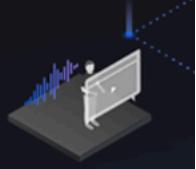
*(i) Maintenance* Thank you for your patience. At this time the email service is now restored. We apologize for any inconvenience this has caused.

# 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.

**Upload Dataset**



### Prepare data

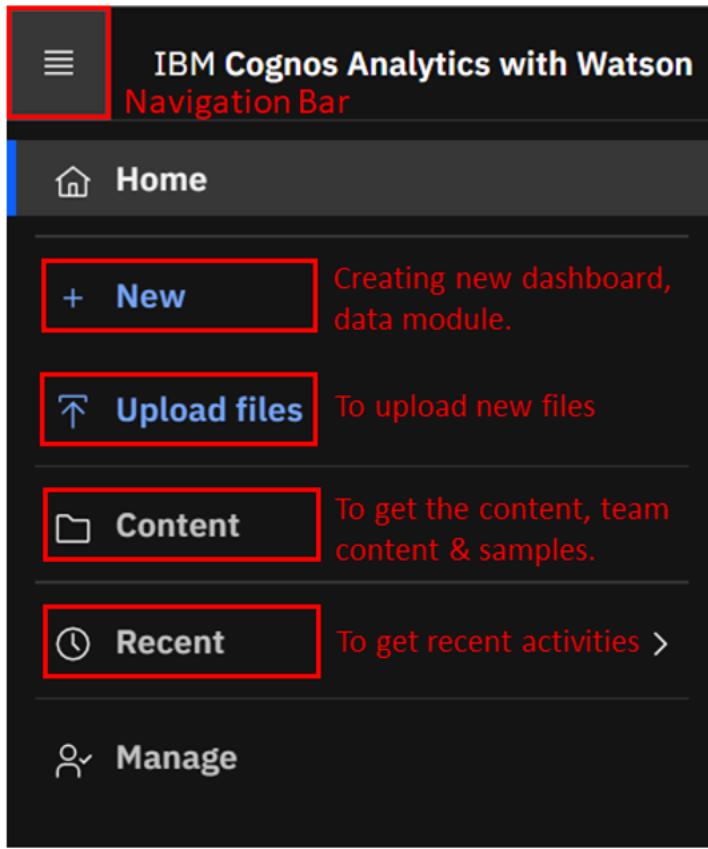
Use data modules to clean and connect data from multiple resources.



### Exploration

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

- 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 "Ask a question" input field with a blue speech bubble icon. On the right, there's a large blue speech bubble icon with three dots. In the bottom right corner of the dark area, there's a "Get started" button. The main content area has a light blue header "To upload the dataset". It contains two sections: one with a red border and a blue up arrow icon, labeled "Upload data and start creating content" with the sub-instruction "Upload spreadsheets, CSV files, and other types of files, and create content based on these files."; and another section with a blue folder icon, labeled "Create content from existing data" with the sub-instruction "Locate data sources in the Content view, and create content based on these sources."

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.\*.

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](#)

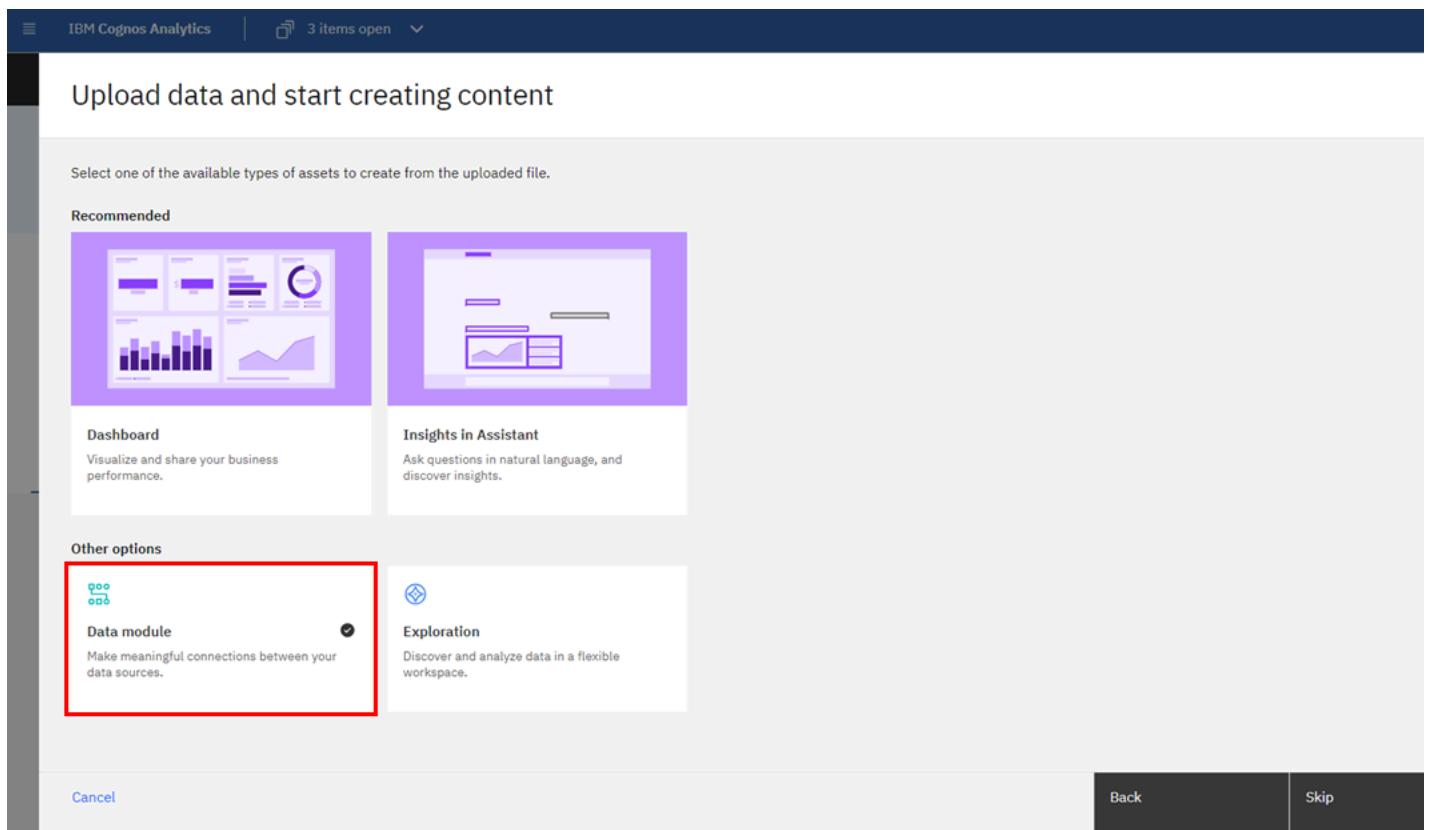
You can upload supported file types that are stored in any location to which your computer has local or LAN access.

Add file

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

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

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**.

<

IBM Cognos Analytics | 1 item open ▾

**Maintenance:** Cognos Analytics Maintenance: 16th of September, 09:00-17:00 UTC Click on More Info to see what actions may be necessary and to subscribe to future events

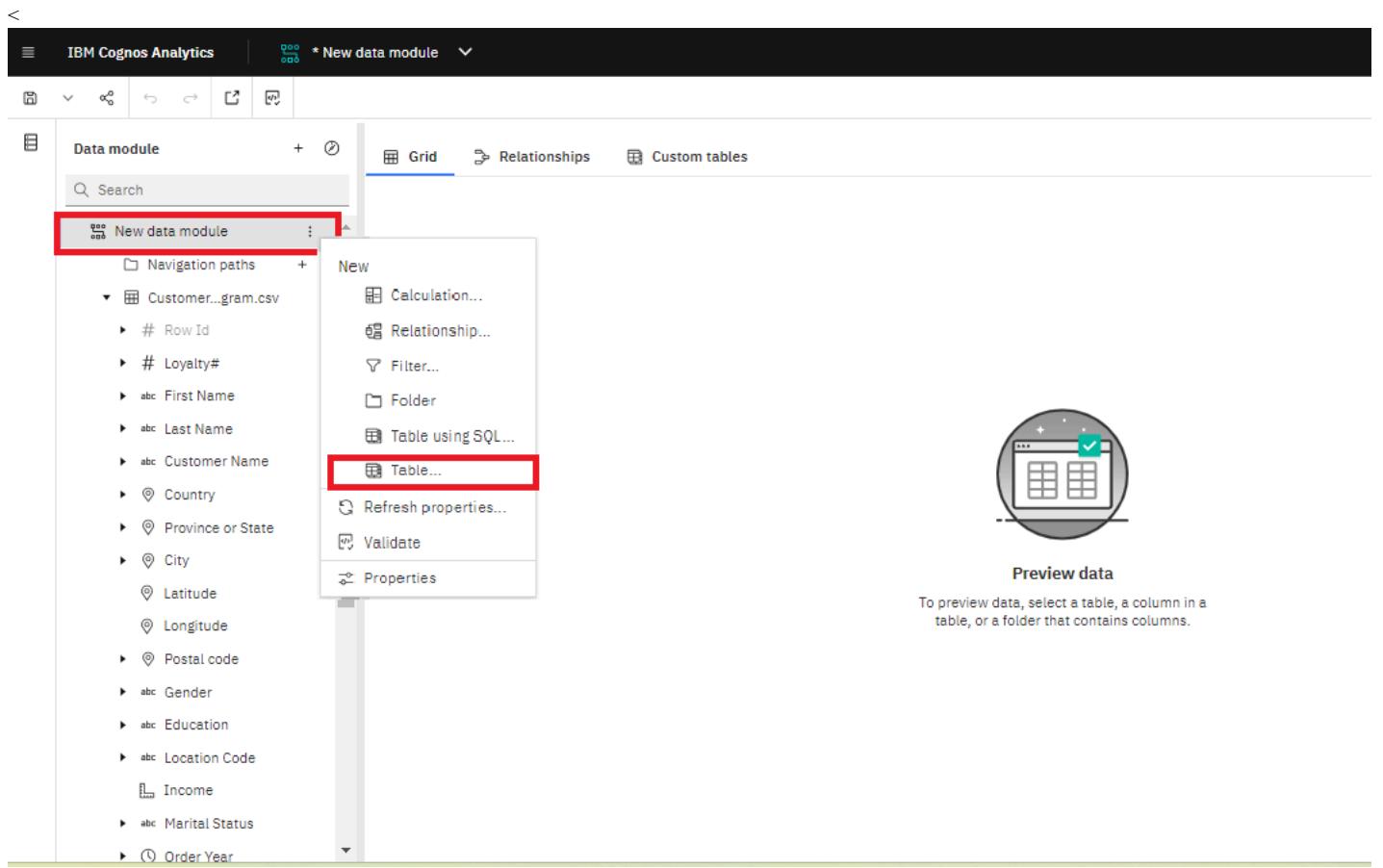
Leverage self-service analytics to make more confident decisions. [Get started](#) [Watch video](#)

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

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

Recent	Action Menu
1 item selected	<ul style="list-style-type: none"> <li><b>Edit data module</b> (highlighted with a red box)</li> <li>Create report</li> <li>Create exploration</li> <li>Create dashboard</li> <li>Create data module</li> <li>Create data set</li> <li>Share</li> <li>Copy or move to</li> <li>Add shortcut</li> <li>Edit name and description</li> <li>Properties</li> <li>Details</li> <li>Remove from recent</li> <li>Delete</li> </ul>
Customer Loyalty Program data module Last Accessed 9/8/2023, 5:02 AM	<ul style="list-style-type: none"> <li>(radio button selected)</li> <li>Create report</li> <li>Create exploration</li> <li>Create dashboard</li> <li>Create data module</li> <li>Create data set</li> <li>Share</li> <li>Copy or move to</li> <li>Add shortcut</li> <li>Edit name and description</li> <li>Properties</li> <li>Details</li> <li>Remove from recent</li> <li>Delete</li> </ul>

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.



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.

<

### Create table

Create a custom table in the data module. This table is not added to your data source.

Selected tables
+
View of tables

Find

Find

CustomerL...ogram.csv
Select

Shortcut to a table  
Create a view of a table, select one or more package tables, or select one or more non-package tables.

Alias of a table  
To create an alias table, select one non-package table.

Copy of a table  
To create a copy of a table, select one non-package table.

Joined view  
To create a join table, select one or two non-package tables.

Union of tables  
To create a union table, select two or more non-package tables that have the same number of columns with compatible data types.

Intersect of tables  
To create an intersect table, select two non-package tables that have the same number of columns with compatible data types.

Except of tables  
To create an except table, select two non-package tables that have the same number of columns with compatible data types.

**Select tables**  
Select and add tables to create a new table from

**Select tables**

**Cancel** **Next**

4. 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"/> Find  <input checked="" type="checkbox"/> CustomerL...ogram.csv						

Data will appear here

**Refresh**

(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.

&lt;

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

Invert      Clear all

(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.

<

IBM Cognos Analytics \* New data module

Save Data module +

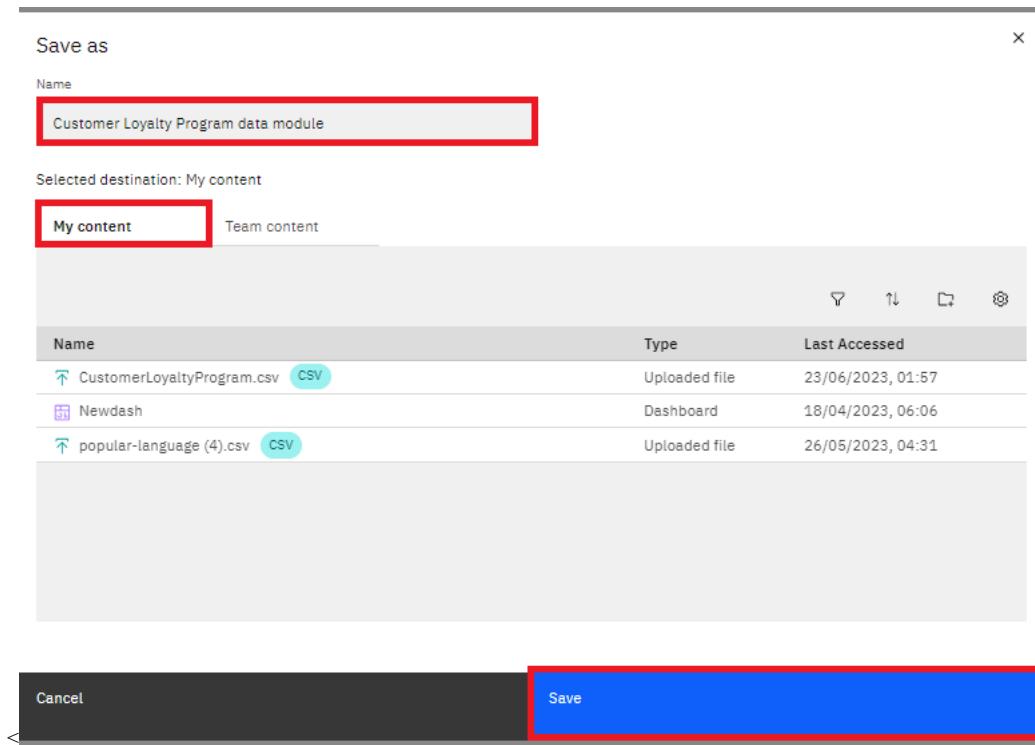
CustomerL...View (1)

CustomerL...ogram.csv      CustomerLo...- View (1)

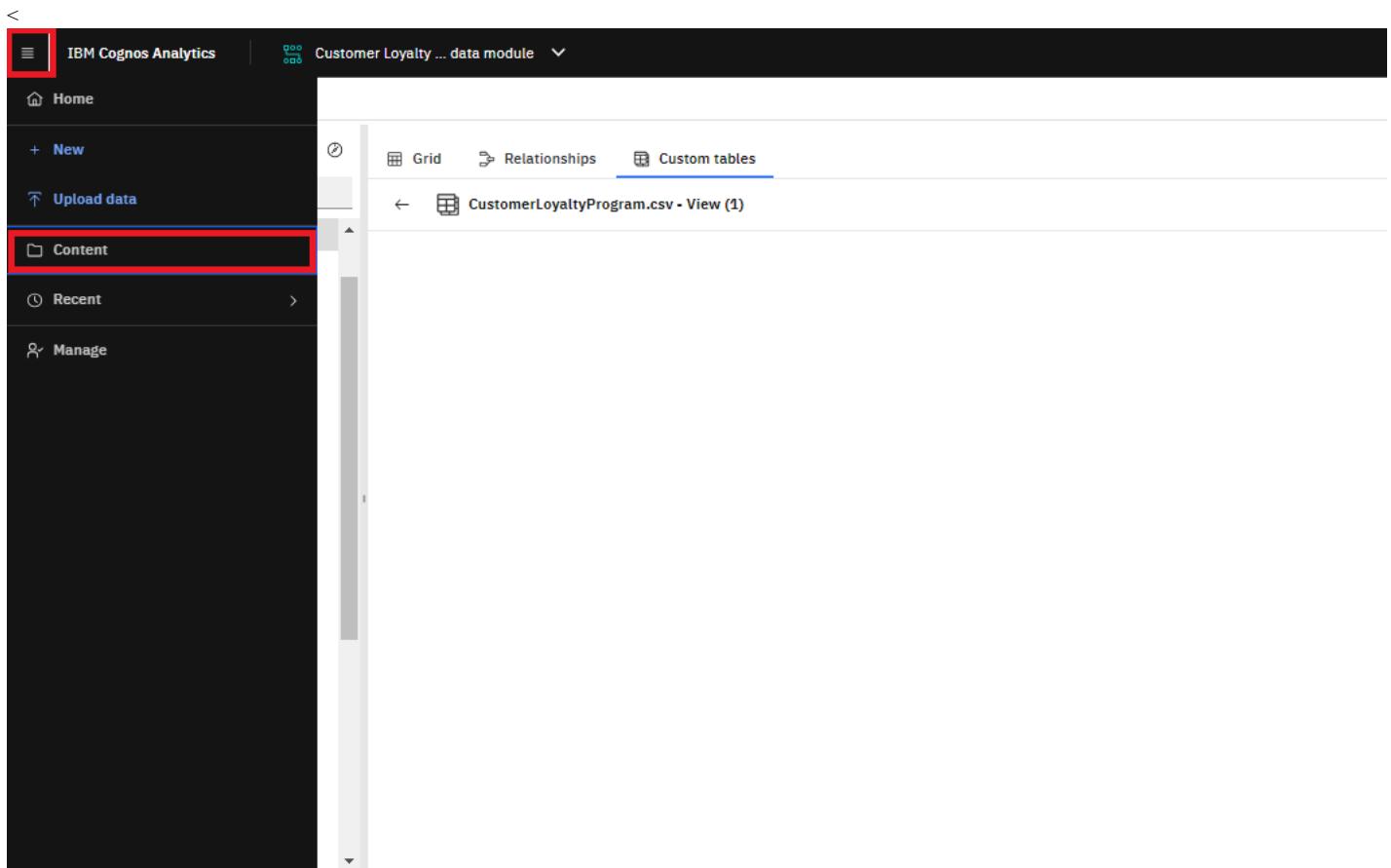
CustomerL...ogram.csv

CustomerL...- View (1)

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.



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.



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

The screenshot shows the 'Content' page in IBM Cognos Analytics. At the top, there's a navigation bar with 'IBM Cognos Analytics' and a 'Content' dropdown. Below the header, there are three tabs: 'My content' (highlighted with a red box), 'Team content', and 'Samples'. The main area displays four uploaded files:

- 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. Includes CSV and download icons.
- Newdash**: Last Accessed 18/04/2023, 06:06. Includes a dashboard icon.
- popular-language (4).csv**: Last Accessed 26/05/2023, 04:31. Includes CSV and download 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 a 'Recent' dashboard template window. At the top, there are two tabs: 'Get started' and 'Recent', with 'Recent' being active. The main area displays a single dashboard template card:

- CustomerLoyaltyProg...**: Last Modified 6/7/2021, 1:56 AM. This card is highlighted with a red box.

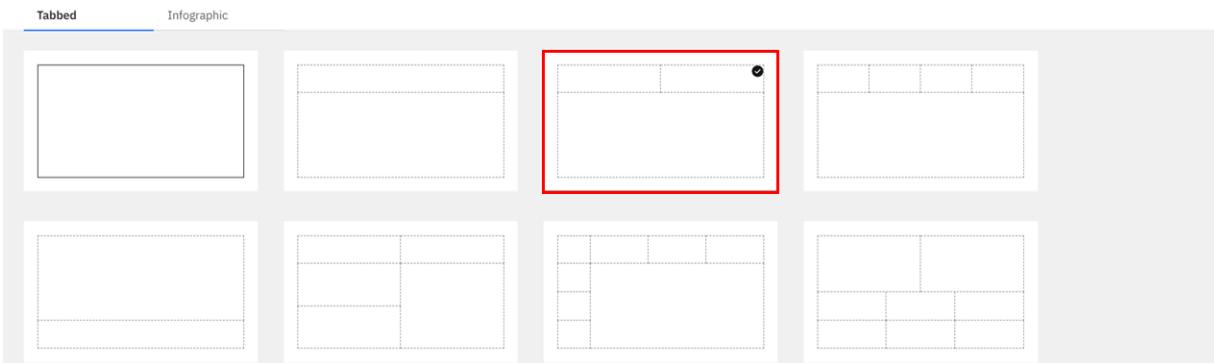
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.

## Create a dashboard

Select a template for your dashboard

Cancel

Create

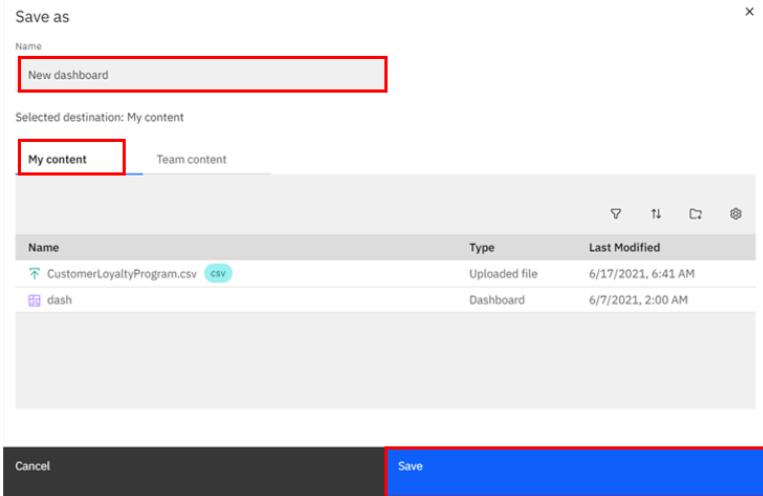


3. Now you have created a new dashboard using the dashboard template.  
update

The screenshot displays the dashboard creation environment. It includes:

- Application Toolbar**: Located at the top, with a red arrow pointing to it from the text above.
- Navigation Panel with Dashboard Toolbox**: A vertical panel on the left containing icons for navigation paths, data sources, and other tools.
- Data Source Panel**: A central panel showing "Selected sources / CustomerLoyaltyProgram.csv". It lists fields such as Loyalty#, First Name, Last Name, Customer Name, Country, Province or State, City, Latitude, Longitude, Postal code, Gender, Education, Location Code, and Income.
- Filter Dock**: A panel at the top right for filtering data, with tabs for "All tabs" and "This tab".
- Dashboard Template**: A large area on the right where the dashboard is being built, currently empty.

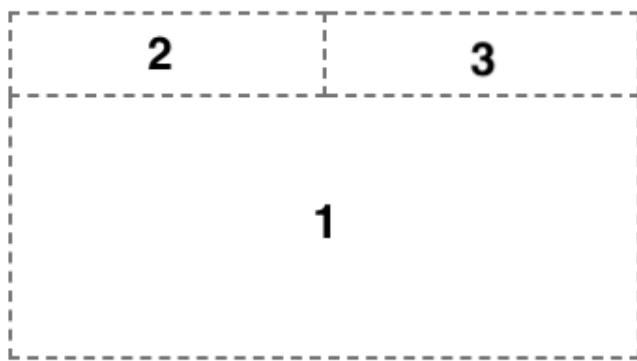
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



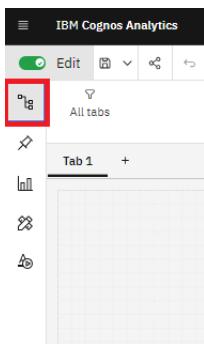
## Task D: Create a Simple Dashboard

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

- 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.

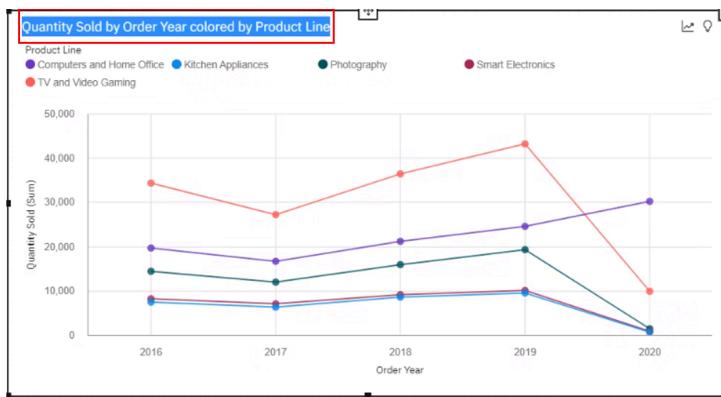


- From the **Data Source** panel, press **CTRL** and select **Order Year**, **Quantity Sold**, **Product Line** and drag it to the center of **Panel 1**, releasing them once you see the drop zone turn blue.

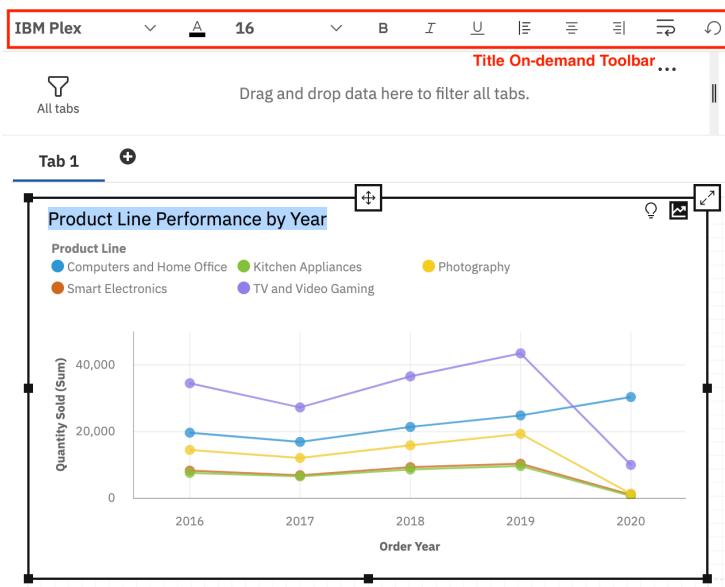
The screenshot shows a data visualization interface with a sidebar on the left and a main panel on the right. The sidebar contains a search bar and a list of navigation paths. Three specific items are highlighted with red boxes: 'Order Year', 'Product Line', and 'Quantity Sold'. A blue arrow points from these highlighted items to a floating toolbar on the right, which also contains the same three items. The main panel has a grid background and a placeholder text 'Drag and drop data here to filter all tabs.'

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.

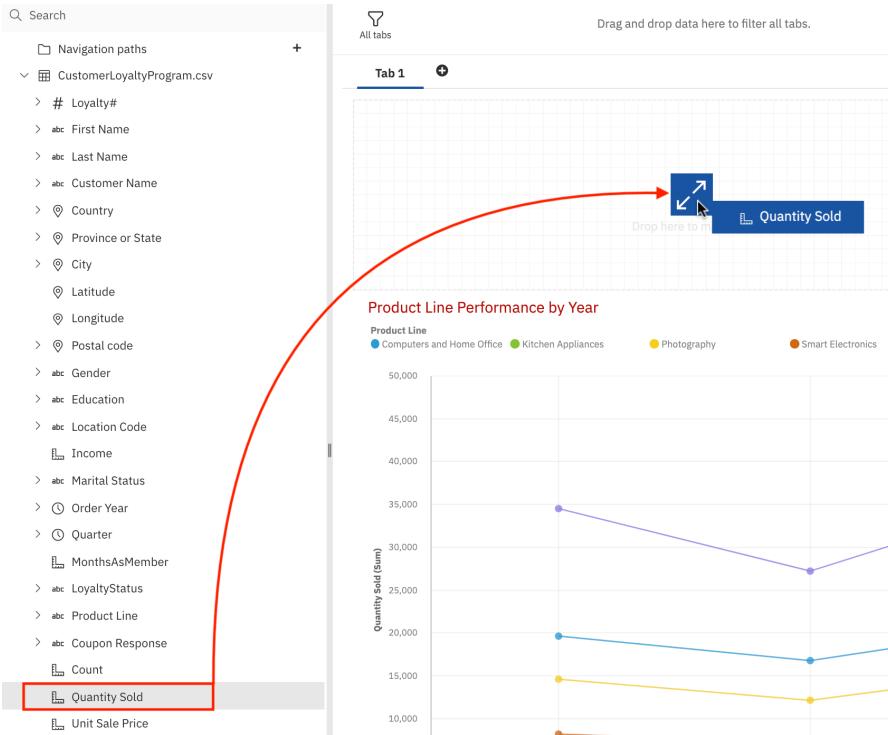


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.

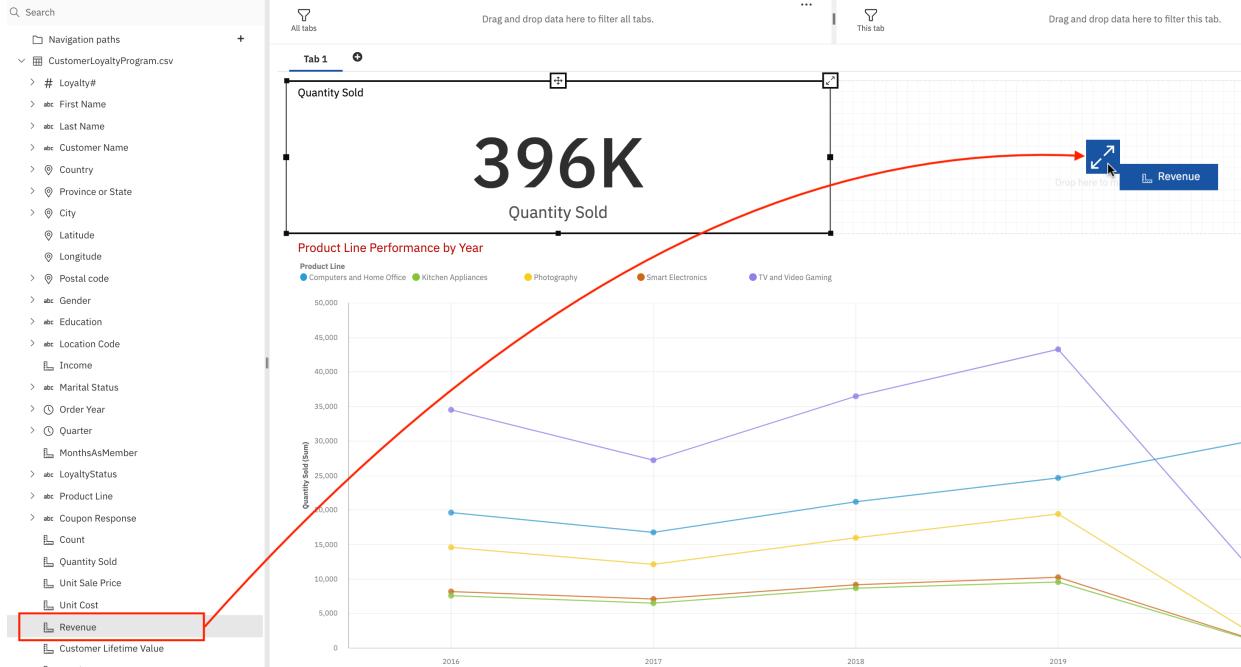


7. Click the **Color picker** icon, and change the color to **Red**, then click the font size drop-down and choose **18**.

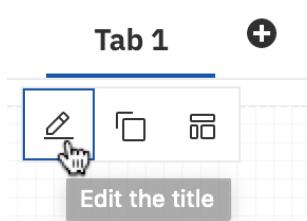
8. From the **Data Source** panel, select **Quantity Sold** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone turn blue**.



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:

Quantity Sold

Revenue

**396K**

Quantity Sold

**\$176,520,879**

Revenue

**Product Line Performance by Year****Product Line**

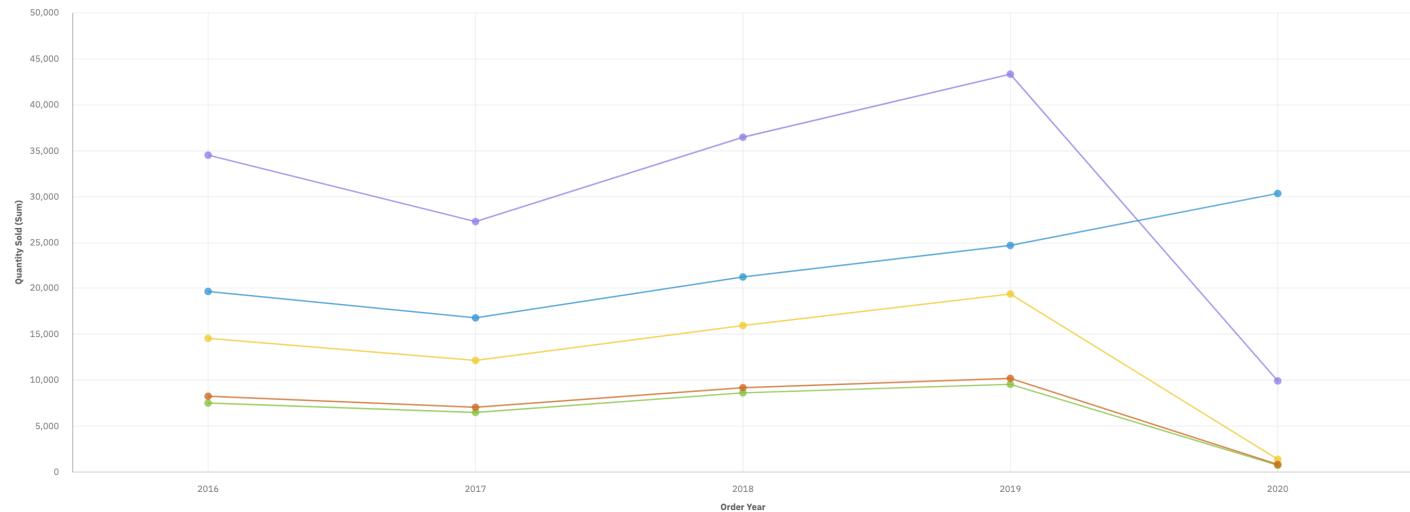
● Computers and Home Office

● Kitchen Appliances

● Photography

● Smart Electronics

● TV and Video Gaming



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

## Author(s)

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