



Hands-on Lab: 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
- 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.

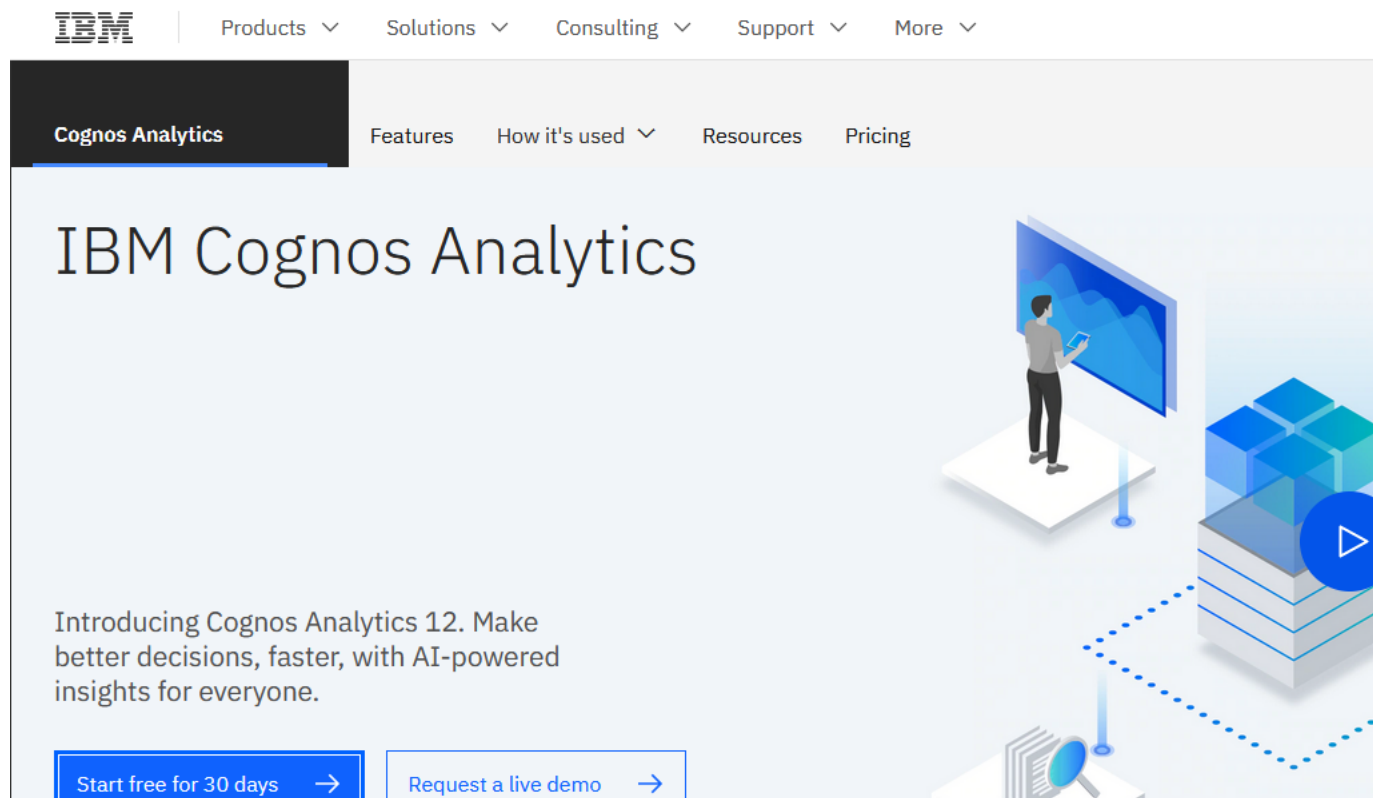
2. Fill out section **1. Account information** with your information and click **Next**. The email address you are going to use here will be called IBMid.



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.



The image shows the IBM Cognos Analytics 12 landing page. At the top, the IBM logo is on the left, and navigation links for Products, Solutions, Consulting, Support, and More are on the right. Below this, a dark blue bar contains the 'Cognos Analytics' logo and links for Features, How it's used, Resources, and Pricing. The main section features a large heading 'IBM Cognos Analytics' and a subheading 'Introducing Cognos Analytics 12. Make better decisions, faster, with AI-powered insights for everyone.' To the right is an illustration of a person standing next to a large screen displaying a data visualization, with a stack of data cubes and a play button icon nearby. At the bottom, there are two buttons: 'Start free for 30 days' and 'Request a live demo'.

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](#)

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 ID). If you have previously been presented with a version of this notice, please refer to the “Changes since the previous version of this notice” below for information about 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

Cancel

Proceed

6. You are now done with the sign up procedure. You will be redirected to myibm.ibm.com/dashboard/ automatically. Wait for a few moments until the Coursera on-line training - Data Visualizations trial offering becomes active.

myibm.ibm.com/dashboard/

Vous vous

IBM

My IBM

Profile

Billing

Products

Trials

1 Offering

Coursera on-line training -
Data Visualizations

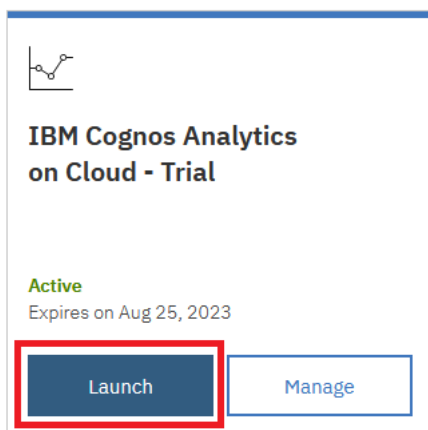
Activation in progress

about:blank

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[View support information](#)[Contact IBM](#) [Privacy](#) [Terms of use](#) [Accessibility](#)

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

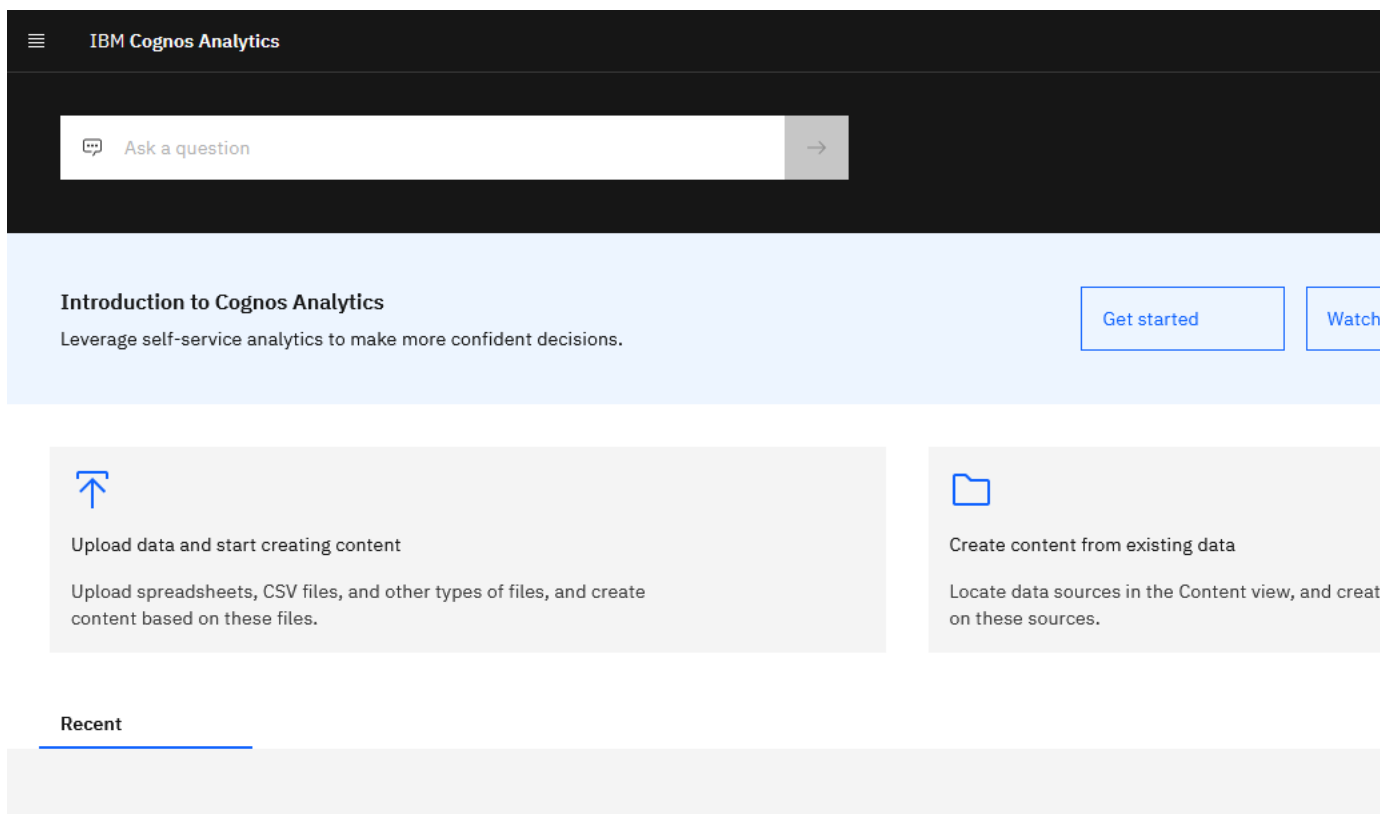


The card displays the IBM Cognos Analytics logo, the title 'IBM Cognos Analytics on Cloud - Trial', and a status of 'Active' with an expiration date of 'Expires on Aug 25, 2023'. At the bottom, there are two buttons: 'Launch' (highlighted with a red border) and 'Manage'.

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.




The screenshot shows the IBM Cognos Analytics dashboard. The top navigation bar includes a hamburger menu and the text 'IBM Cognos Analytics'. Below this is a search bar with the placeholder text 'Ask a question'. The main content area features a section titled 'Introduction to Cognos Analytics' with the subtitle 'Leverage self-service analytics to make more confident decisions.' and two buttons: 'Get started' and 'Watch'. Below this, there are two cards: 'Upload data and start creating content' (with an upload icon) and 'Create content from existing data' (with a folder icon). The bottom section is titled 'Recent' and is currently empty.


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 and then repeat steps 7 and 8.

Log in to IBM

IBMid [Forgot IBMid?](#)

@gmail.com|

☒ Remember Me 

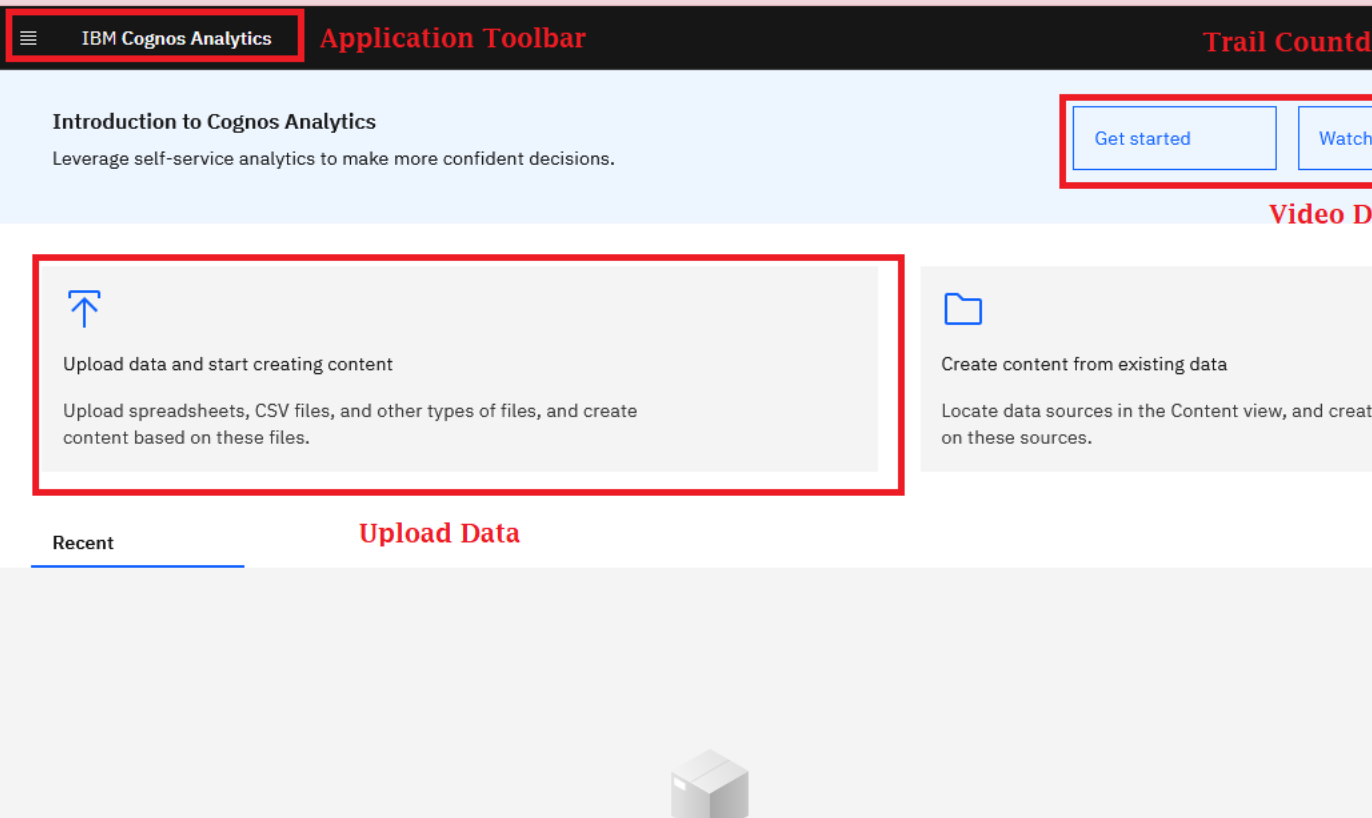
Continue 

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

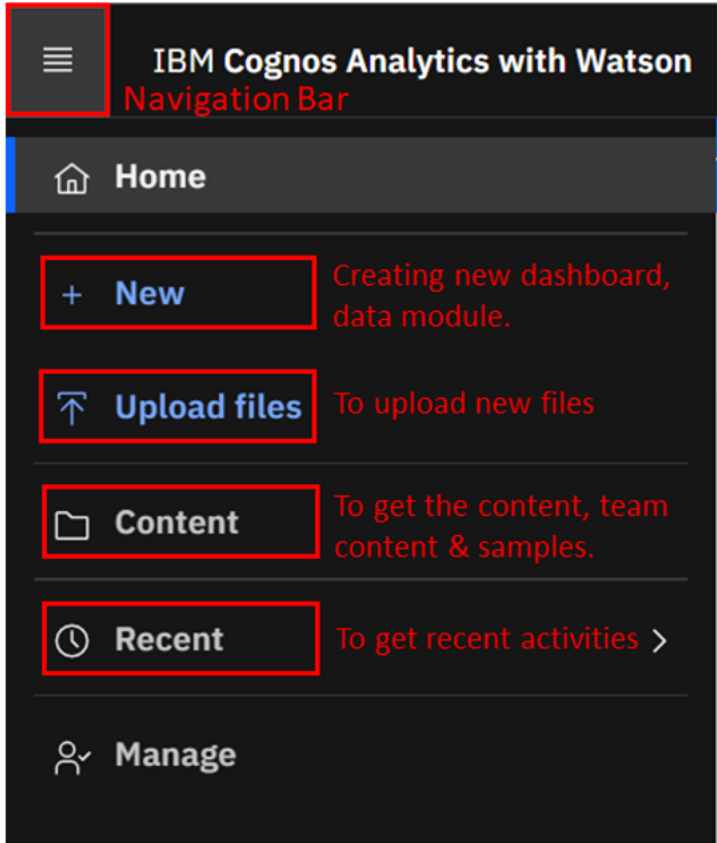
Exercise 2: Navigate around the Cognos Analytics UI

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.

IBM Cognos Analytics

Assistant

No source ⚠ Select

@Cognos ⓘ
Welcome to Assistant

Get started

To get answers about your data, connect to a data source first.
Click **Select source** and choose the source. Then, start asking questions.

Select source

Ask questions

Type a question or phrase in the input box. Here are some examples of questions you can ask:

- Show me Sales by Region
- What's my average Revenue in 2022?

Create dashboard

Build an interactive dashboard, complete with visualizations, that is based on your data.

Type or click **Create dashboard** to get started.

Get help

Still not sure how to use the Assistant? Get guidance at any point.

Type or click **Help** for guidance.

Ask a question

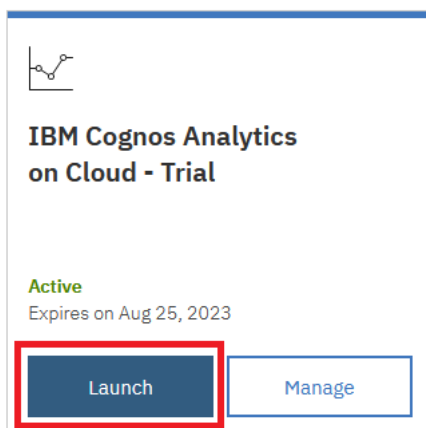
Exercise 3: Create a Simple Dashboard with Cognos Analytics

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/.
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.

☰

IBM Cognos Analytics

💬

Ask a question

➔

Introduction to Cognos Analytics

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 on these sources.

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

☰

IBM Cognos Analytics

Upload data and start creating content

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

Drag and drop file here or click to upload

Want to know more about uploading data? [Learn more](#)

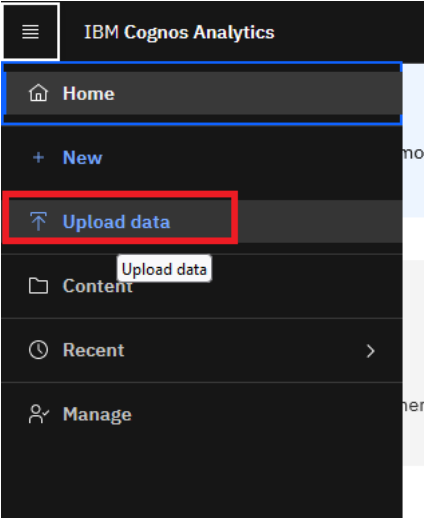
Cancel

Back

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

about:blank

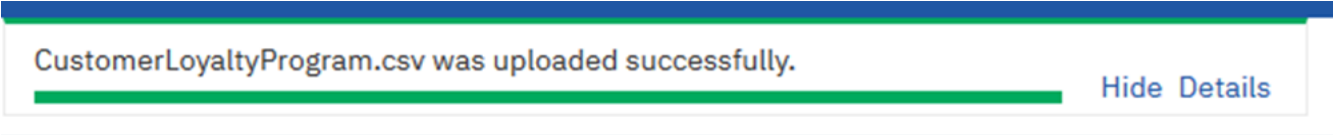
13/29



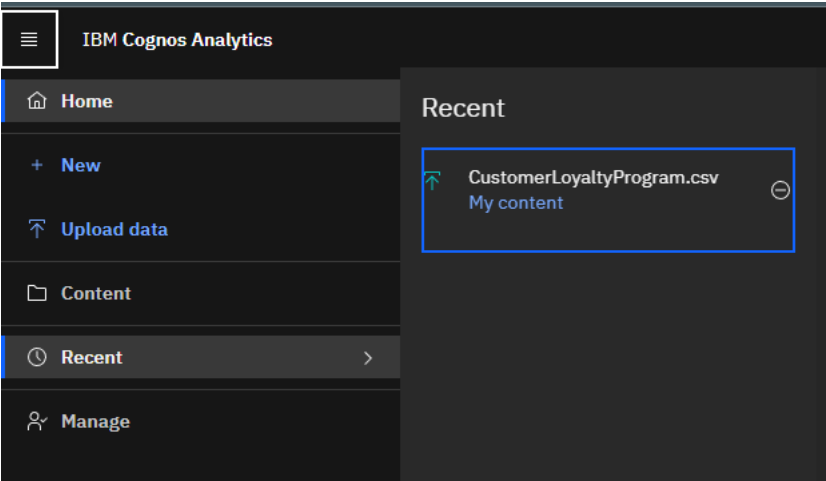
7. As the file uploads, notice that a series of status bars will be visible as the upload process reads and analyzes the data being brought in.



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



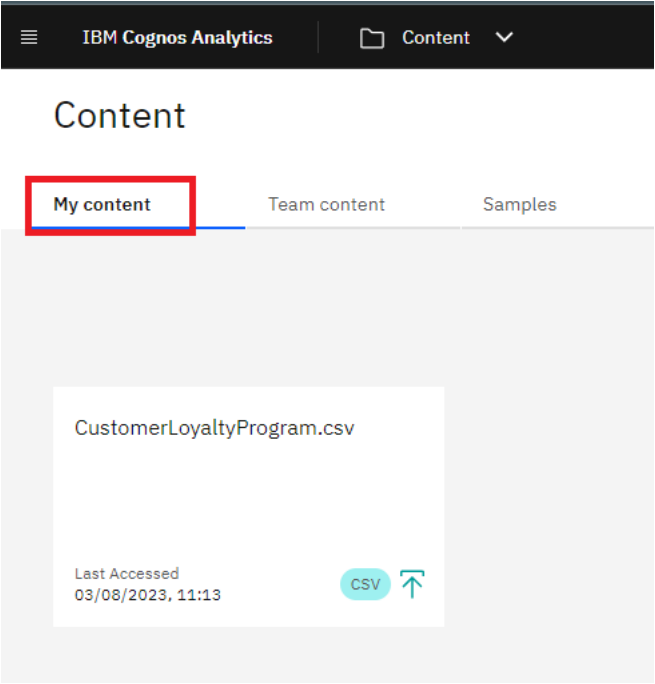
9. In the **Recent** section, you will see the new uploaded data file.



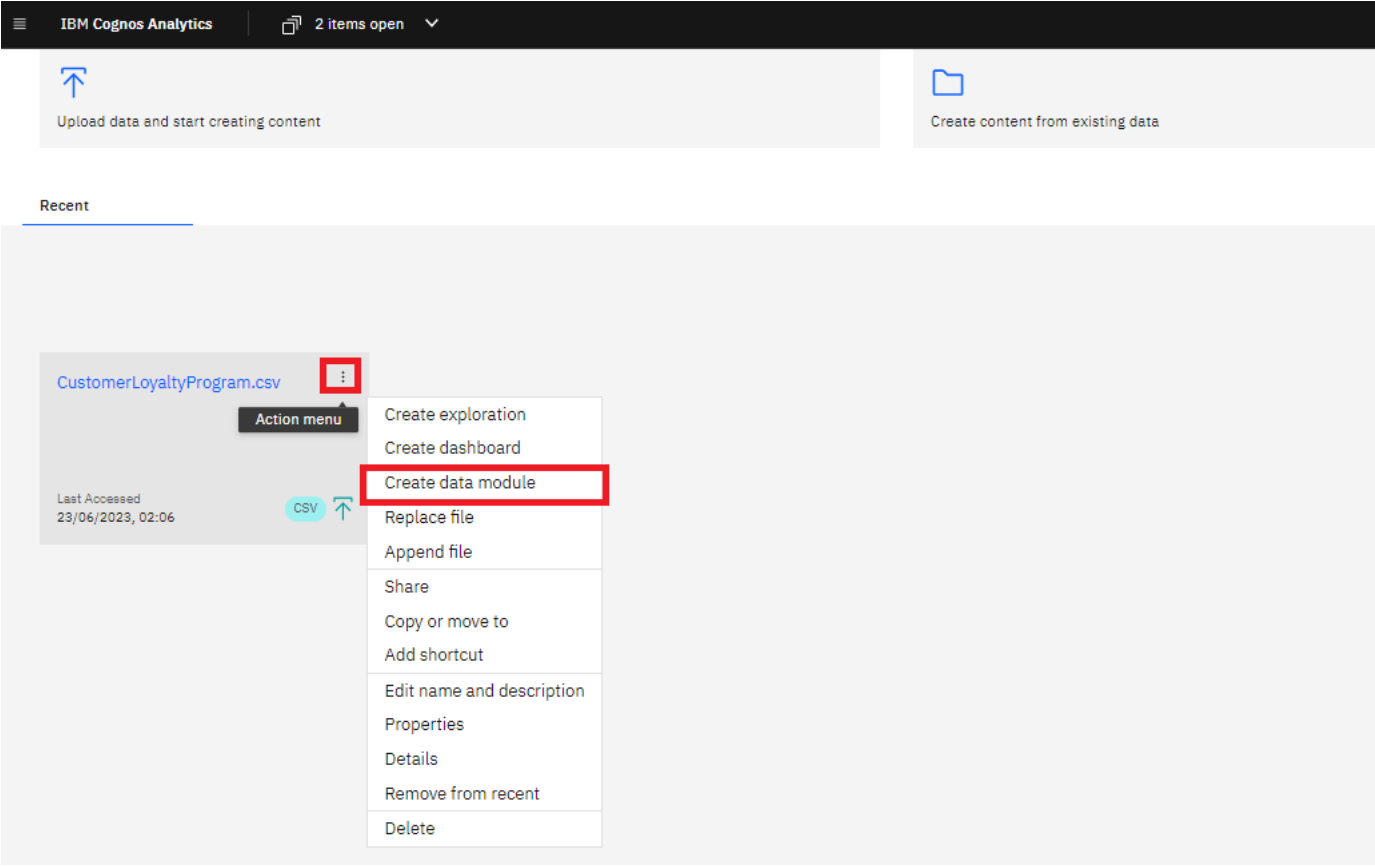
Task B: Convert the uploaded CSV file into Data Module and view the table on IBM Cognos.

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

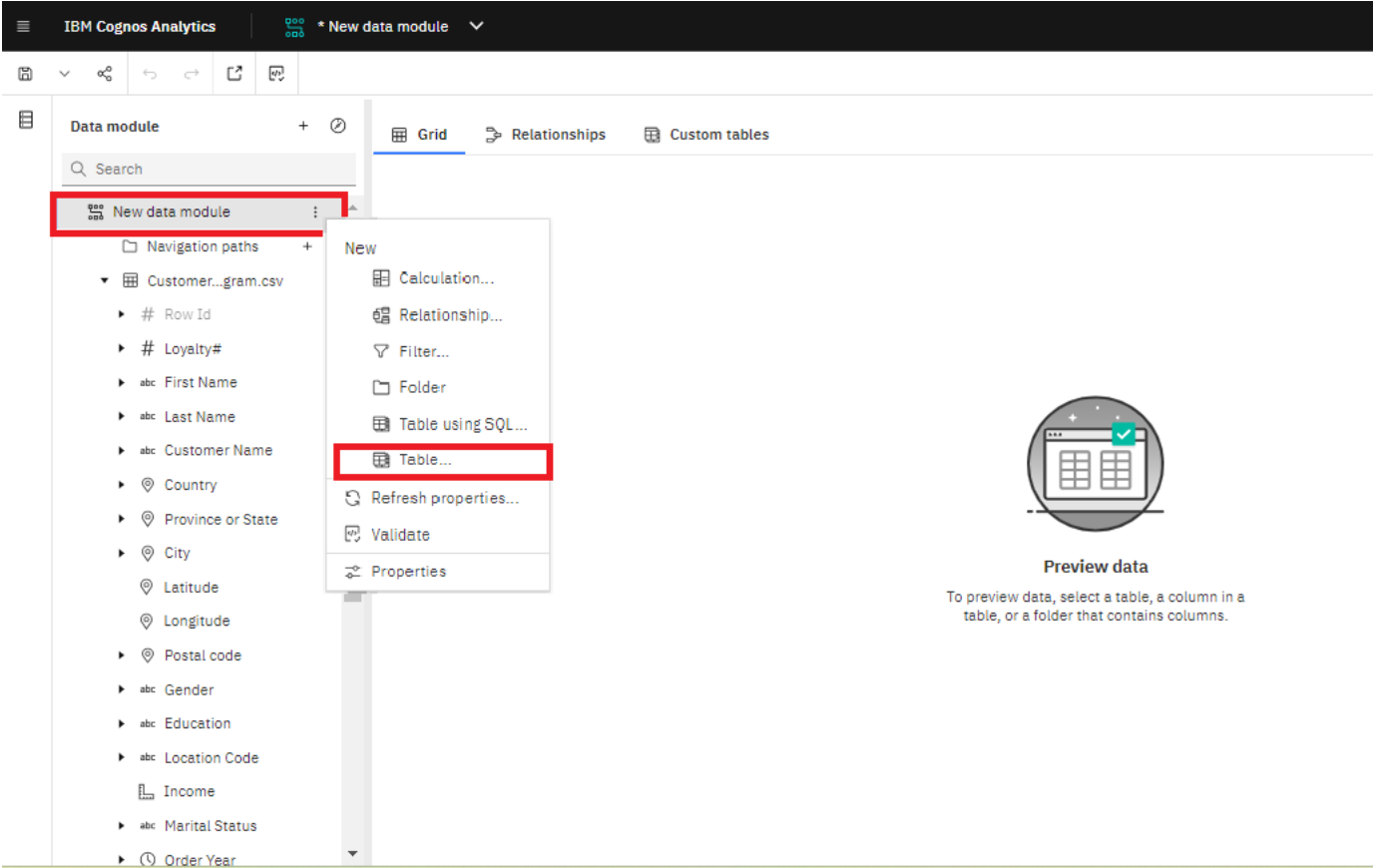
- 1. In the menu, click **Content**, then select the **My content** tab.



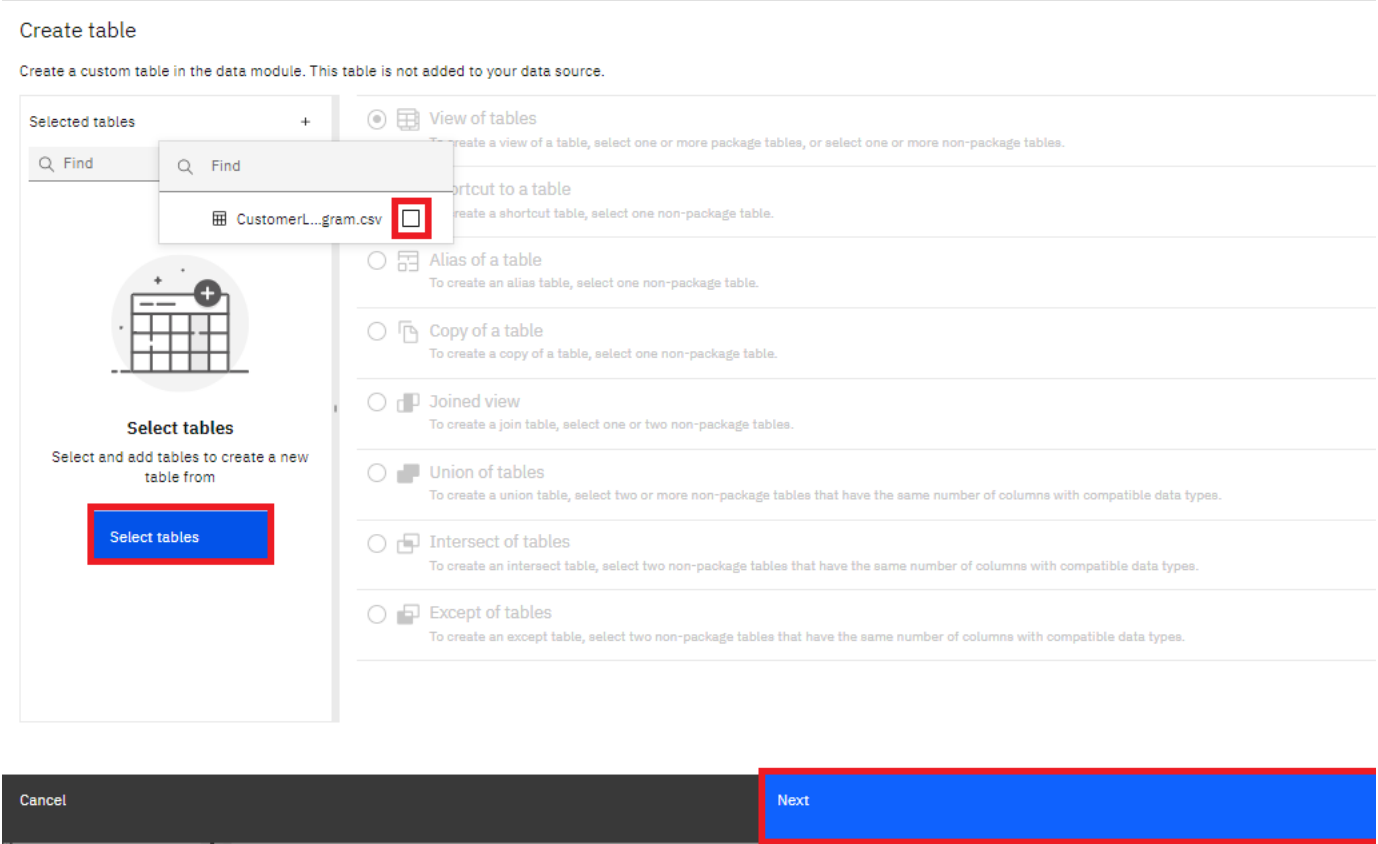
2. Click the **Action Menu** (represented by three dots) to the right of the *CustomerLoyaltyProgram.csv* file, and then click **Create data module**.



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.

Create a view of a table

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

Select items

Q Find

CustomerL...ogram.csv ☒

InvertClear all

Row Id	Loyalty#	First Name	Last Name	Customer Name	Country
Data will appear here					
Refresh					

(29) columns selected.

PreviousCancelFinish

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

Q Find

CustomerL...ogram.csv ☒

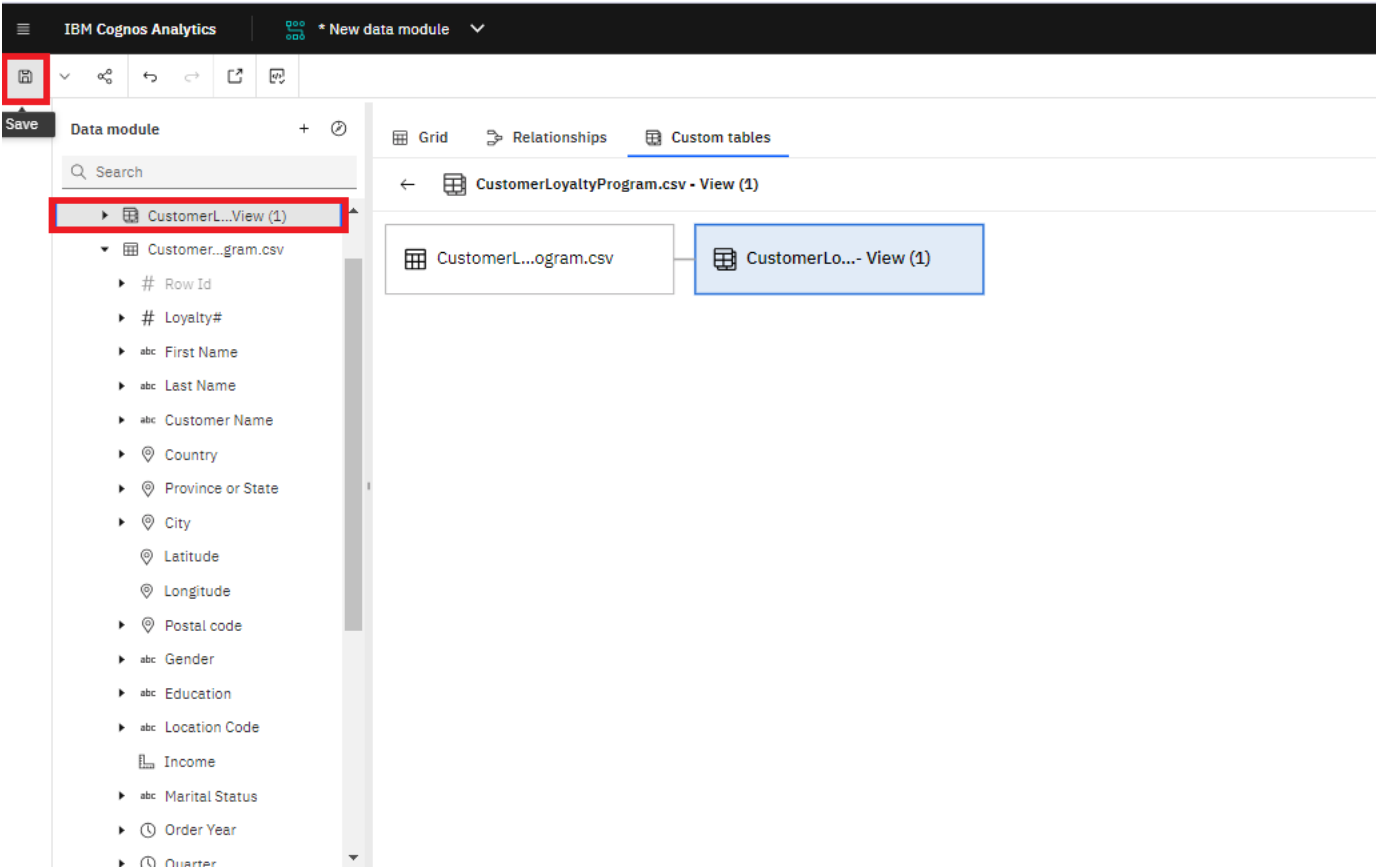
InvertClear all

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 King
8	723924	Adolph	Prey	Adolph Prey	Germany
9	202299	Adria	Osterstuck	Adria Osterstuck	Canada
10	826271	Adriane	Dottin	Adriane Dottin	Canada
11	616030	Akilah	Carvalho	Akilah Carvalho	Germany
12	747903	Al	Johson	Al Johson	United Stat

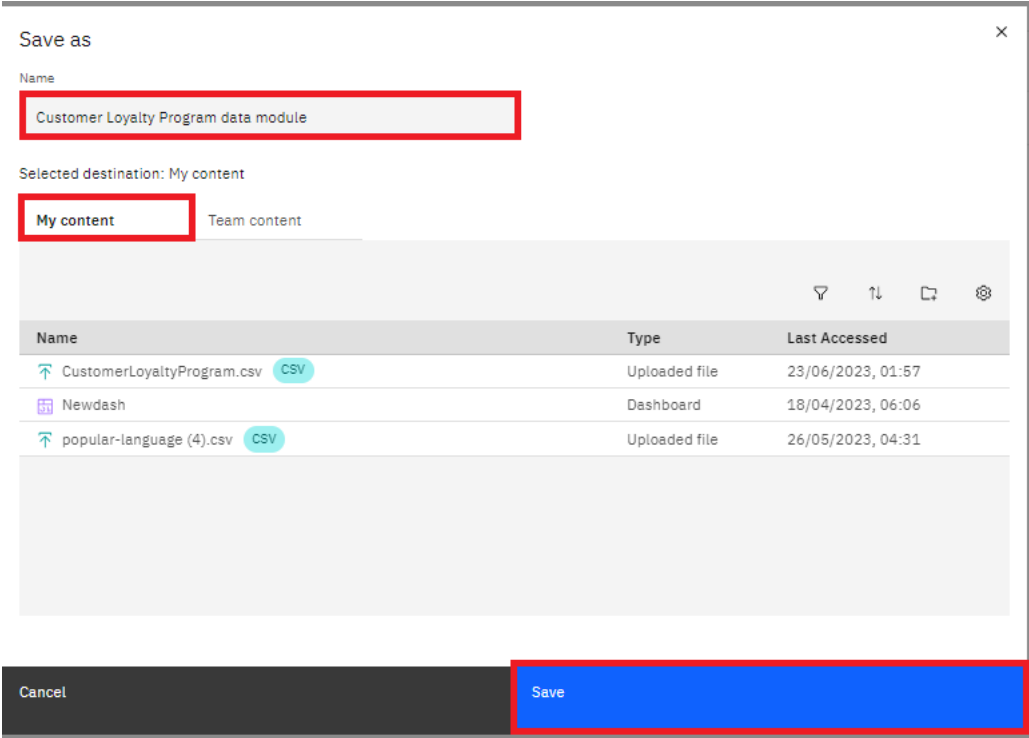
(29) columns selected.

PreviousCancelFinish

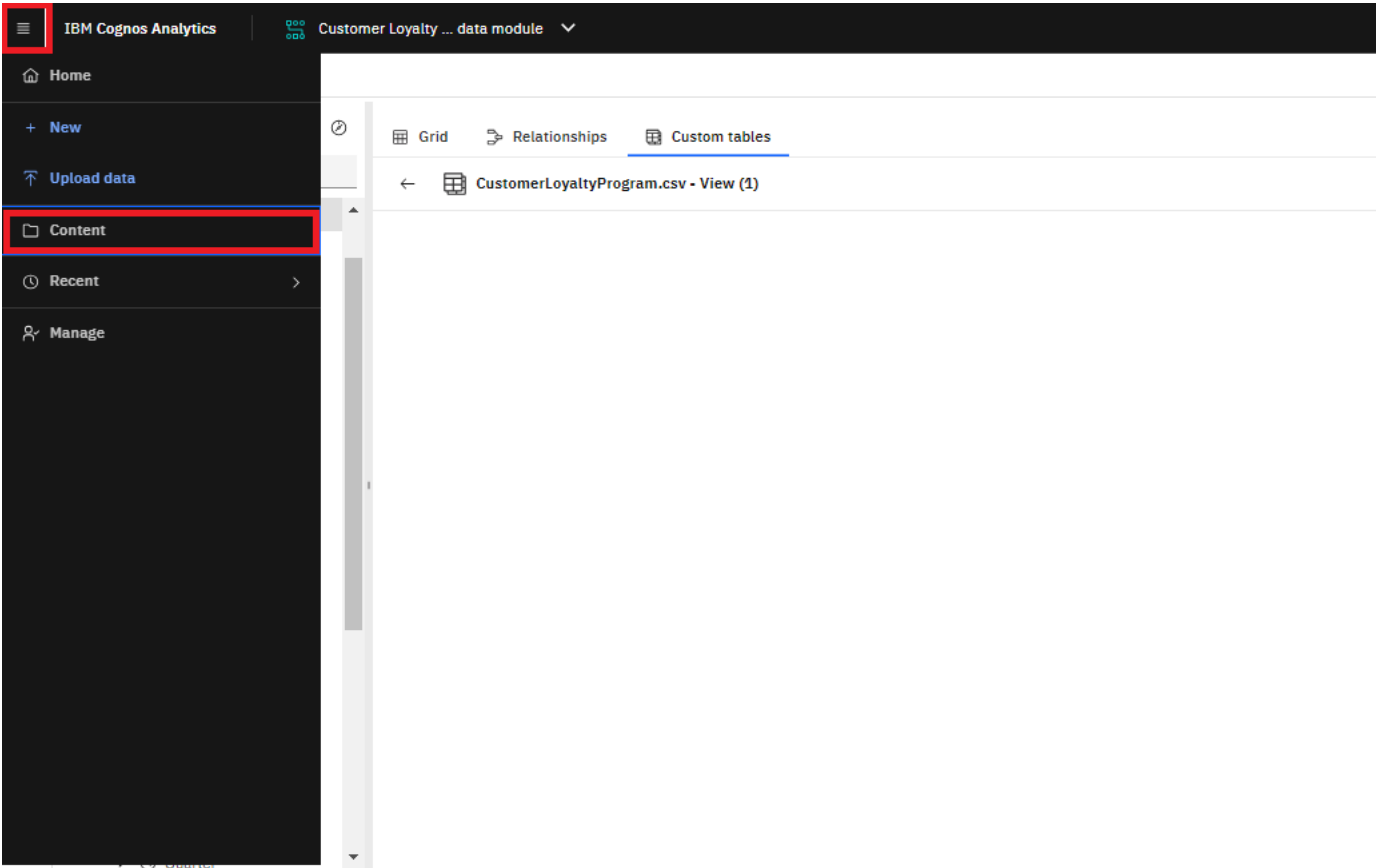
7. The new table view will be added in the source panel. Save this data module by clicking **Save**.



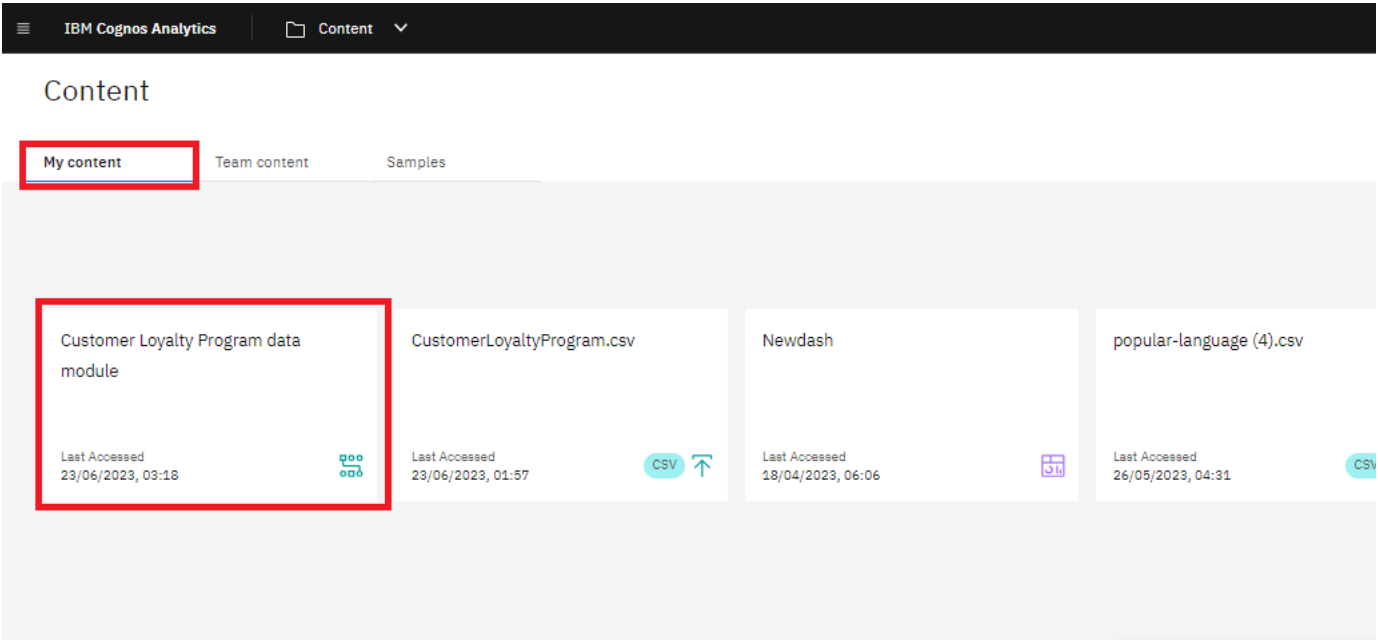
8. In the **Save as** window, enter the name **Customer Loyalty Program data module**, select the **My content** tab as the destination, and click **Save** to proceed.



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**.

IBM Cognos Analytics

Recent

1 item selected

More +

Create ▾

Remove from

Step 1 - Select Dataset

CustomerLoyaltyProgram.csv

Last Accessed
7/26/2023, 5:22 AM

CSV

Step 2 - Click on Create

Create exploration

Create dashboard

Create data module

Step 3 - Click on 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**.

Create a dashboard

Select a template for your dashboard

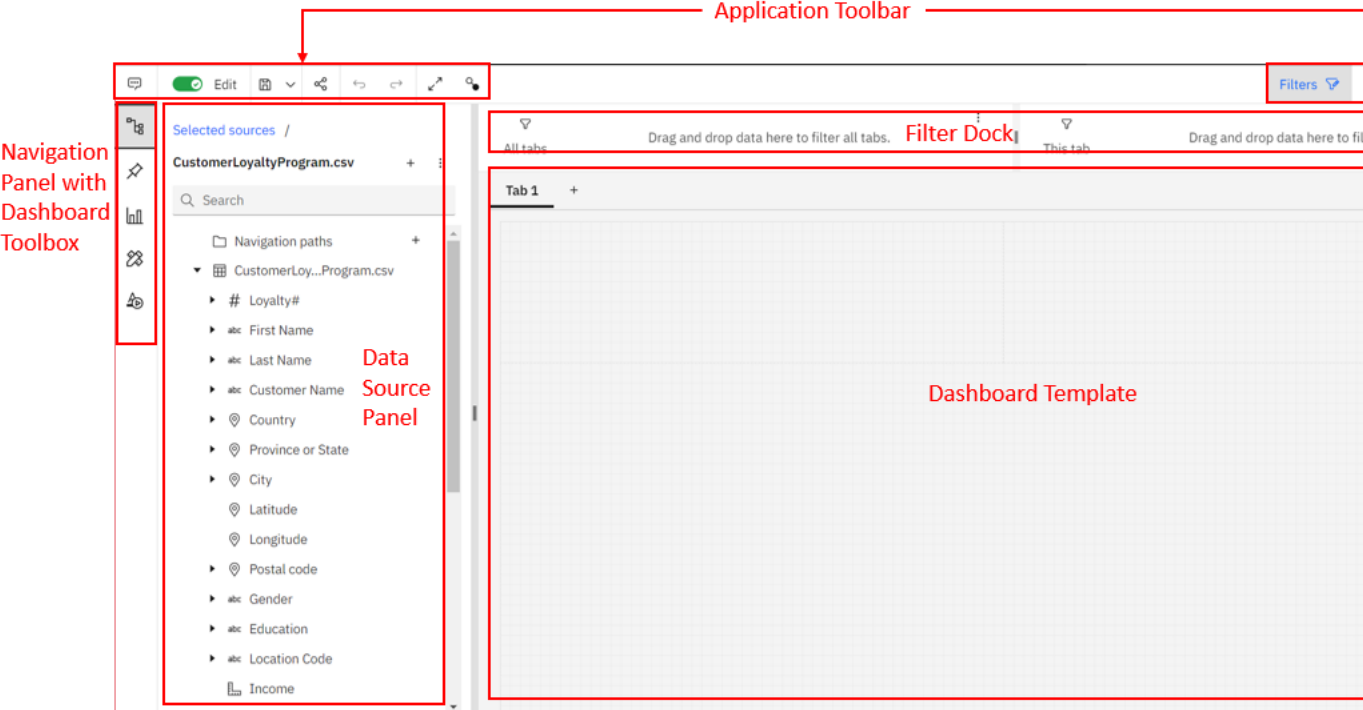
Tabbed

Infographic

5. Now, you have created a new dashboard using a dashboard template.

about:blank

20/29



- 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 CSV	Uploaded file	03/08/2023, 11:13

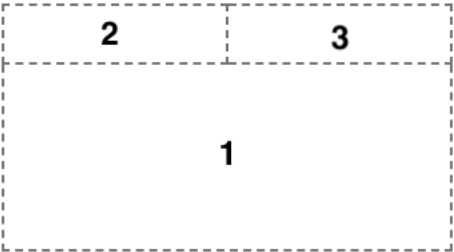
Cancel

Save

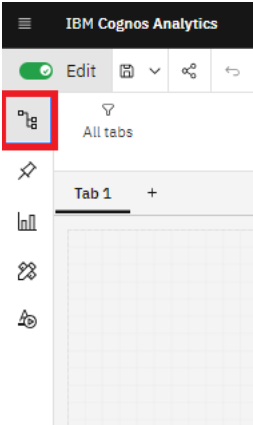
Task D: Create a Simple Dashboard

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.

Q Search

Navigation paths

CustomerLoyaltyProgram.csv

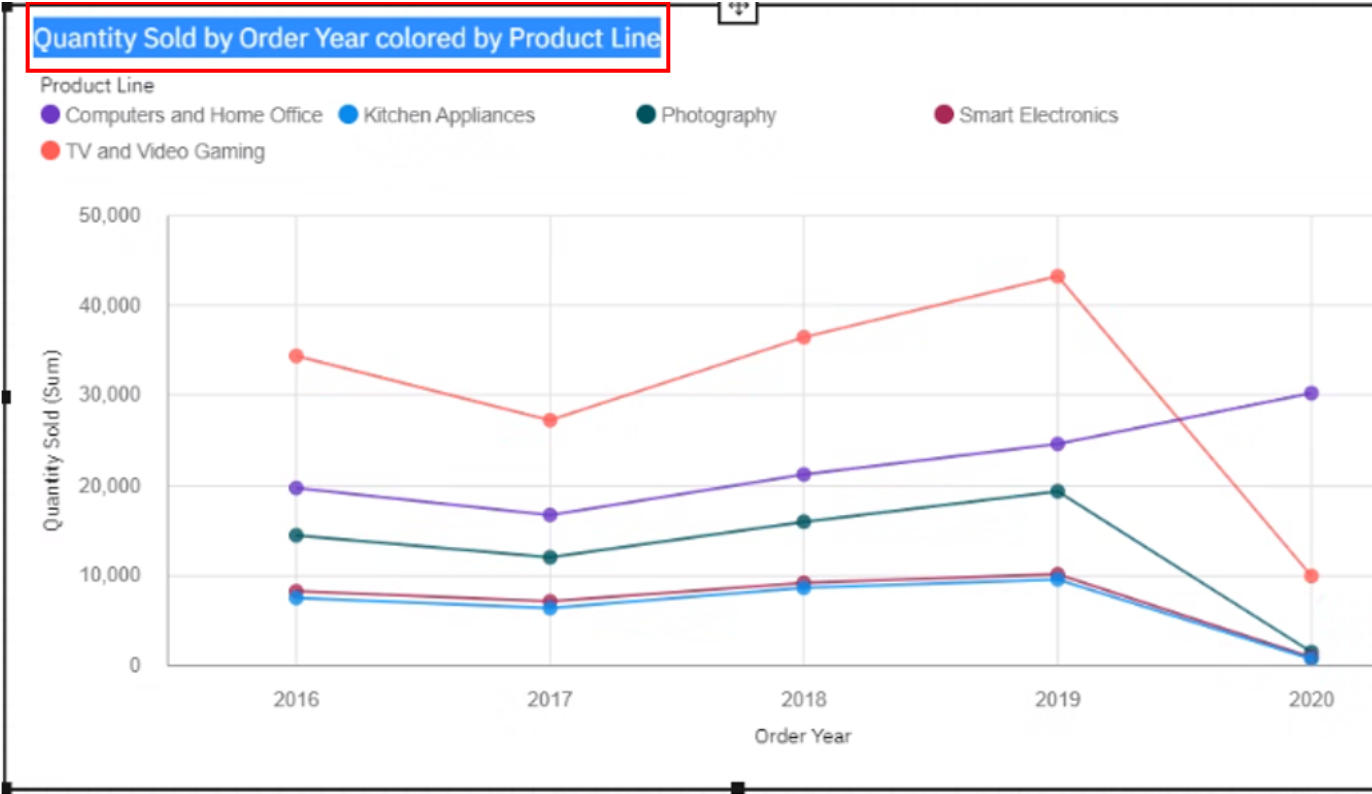
- > # Loyalty#
- > abc First Name
- > abc Last Name
- > abc Customer Name
- > Country
- > Province or State
- > City
- Latitude
- Longitude
- > Postal code
- > abc Gender
- > abc Education
- > abc Location Code
- Income
- > abc Marital Status
- > Order Year
- > Quarter
- MonthsAsMember
- > abc LoyaltyStatus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

All tabs

Tab 1

Loyalty Count

- 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*.



- 6. Highlight the title text and use the on-demand toolbar to change the properties of the title.

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B

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Title On-demand



All tabs

Drag and drop data here to filter all tabs.

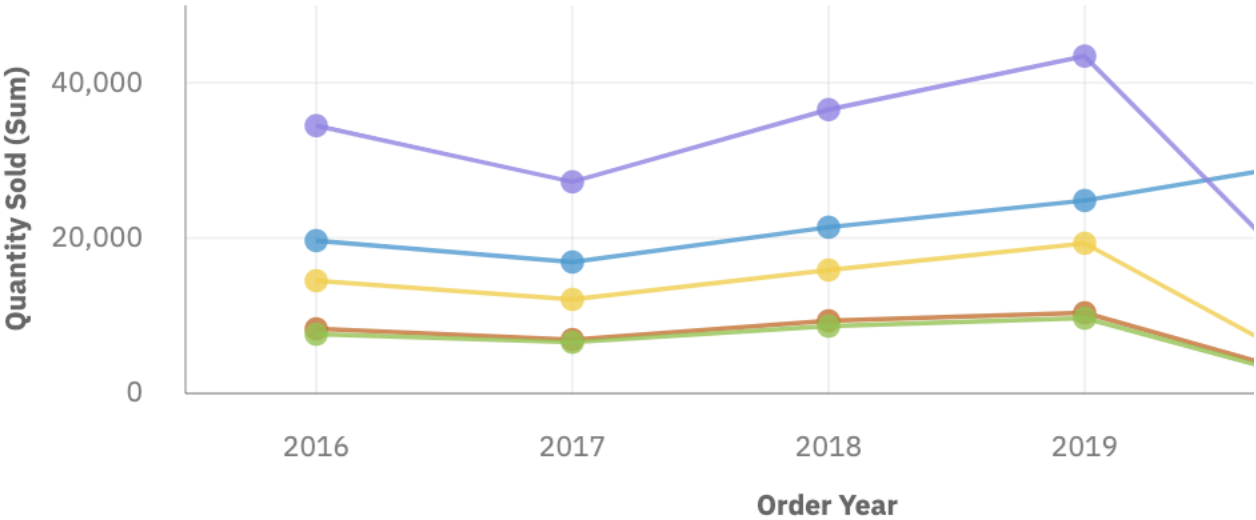
Tab 1



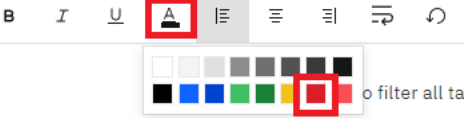
Product Line Performance by Year

Product Line

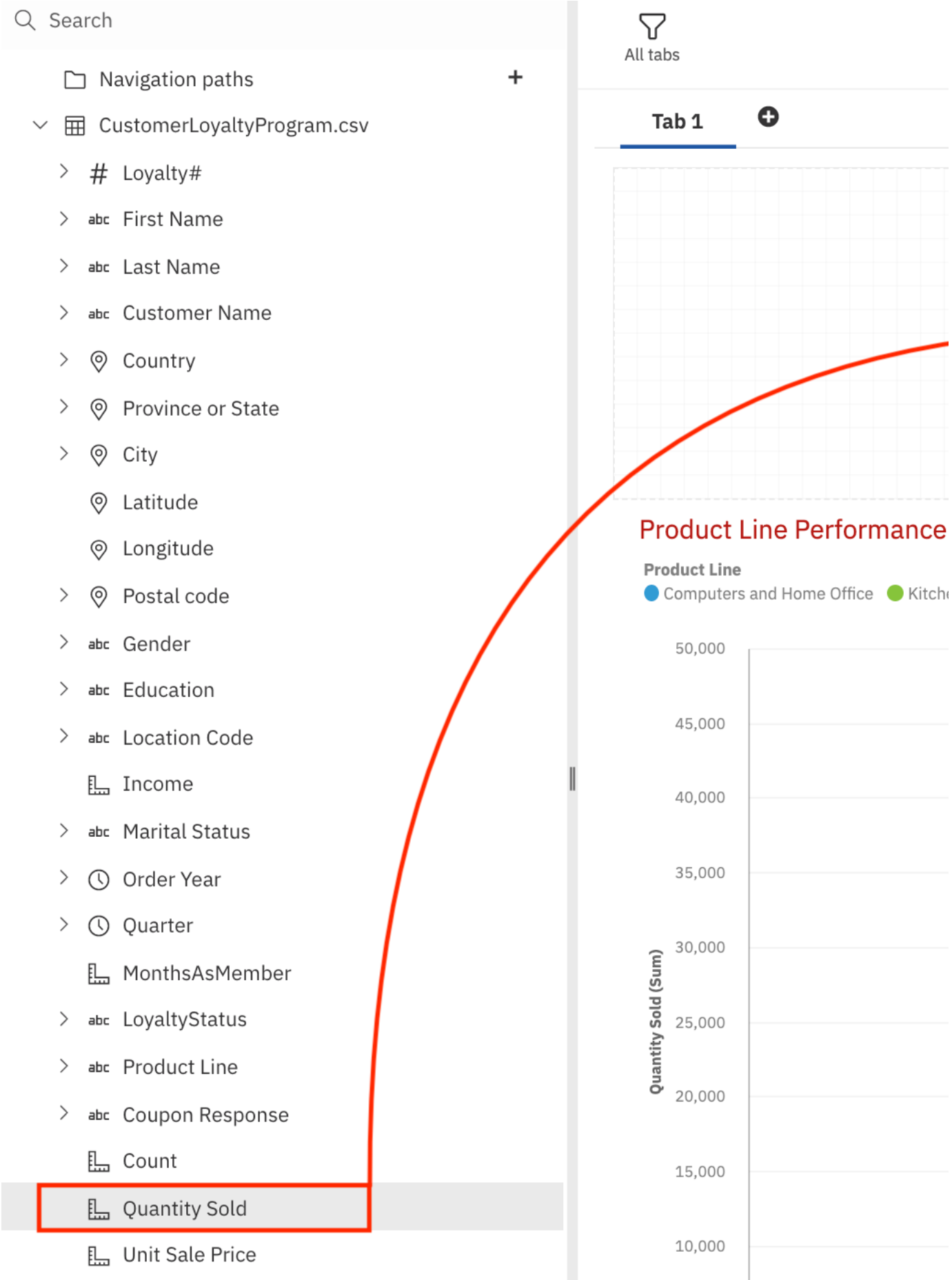
- Computers and Home Office
- Kitchen Appliances
- Photography
- Smart Electronics
- TV and Video Gaming



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



All tabs

Tab 1

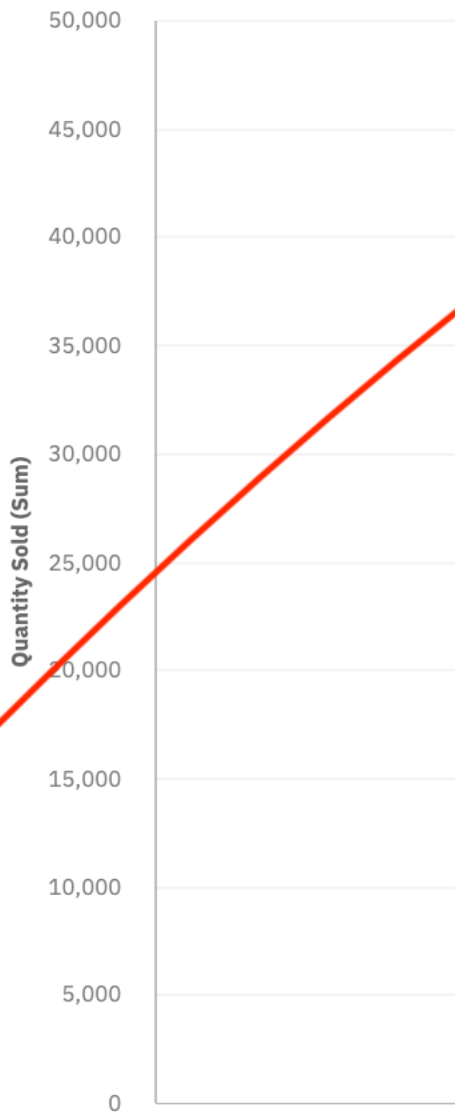


Quantity Sold

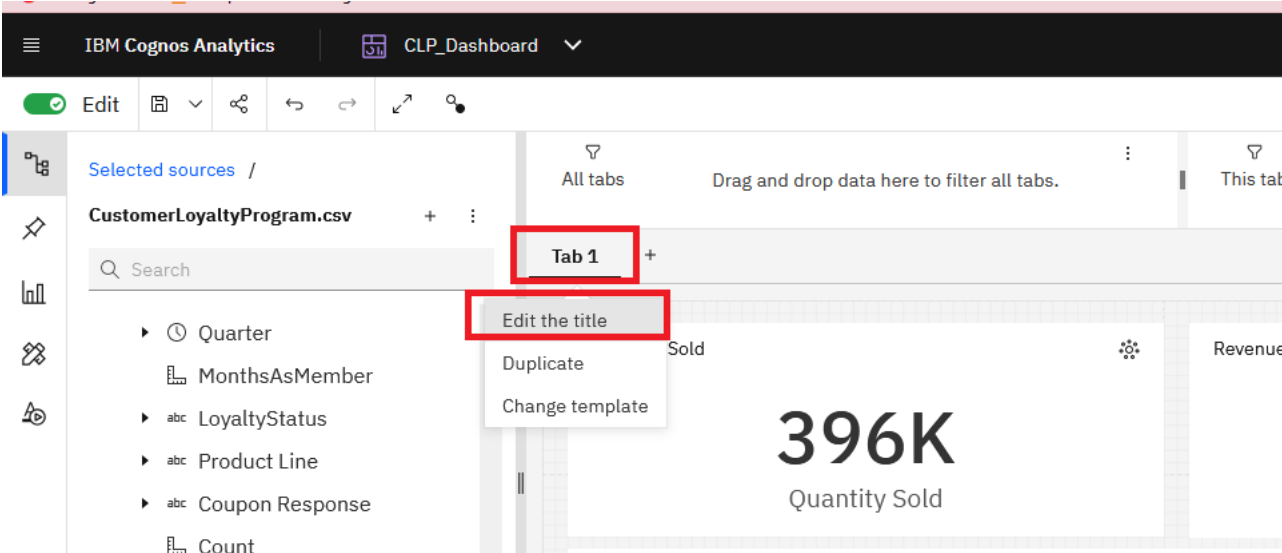
Product Line Performance

Product Line

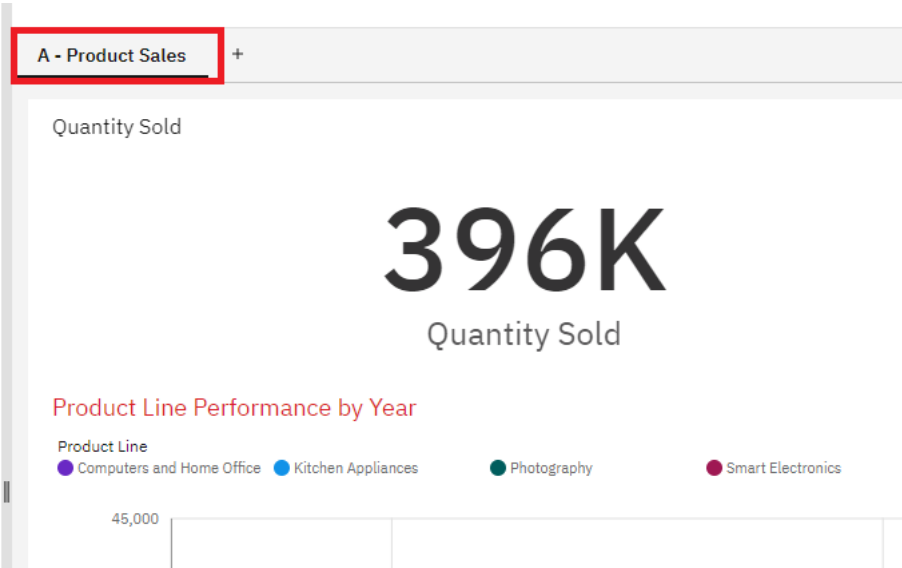
Computers and Home Office Kitche



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

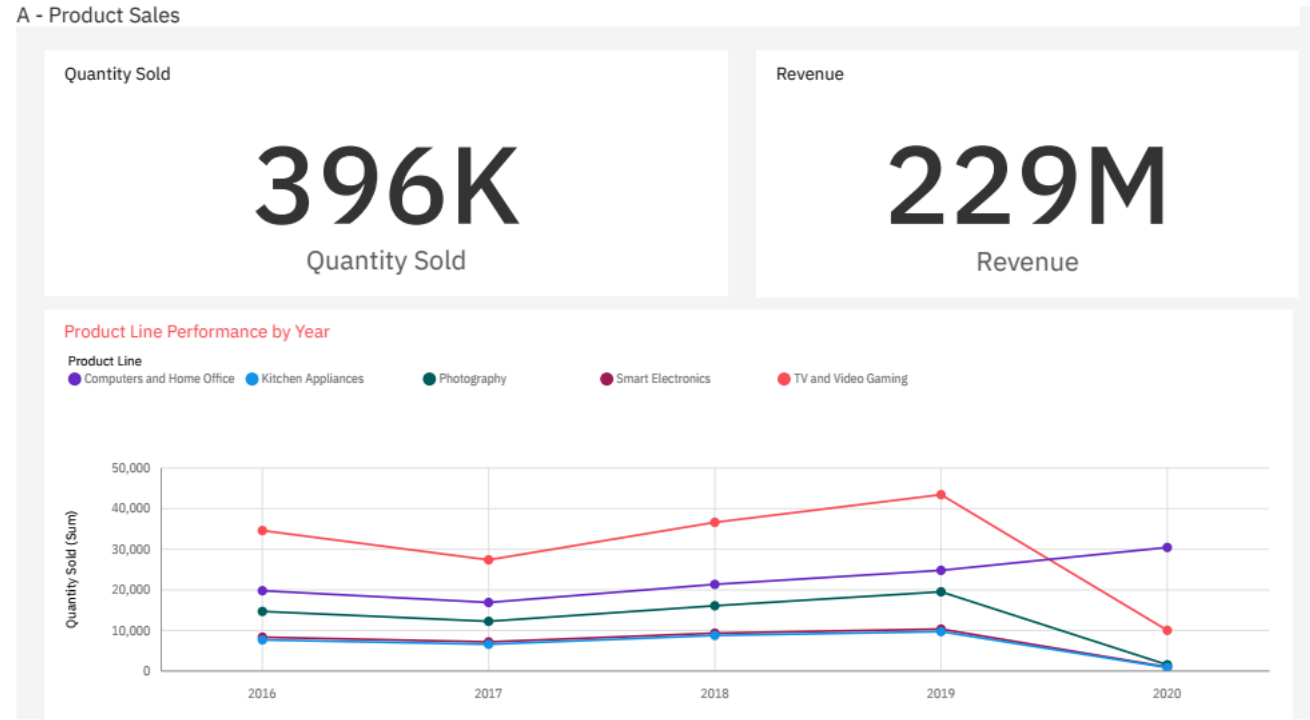


11. Rename the tab to **A - Product Sales**.



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](#)

Changelog

Date	Version	Changed by	Change Description
2023-08-16	2.8	Steve Hord	QA pass with edits
2023-08-03	2.7	Steve Ryan	Peer review: Updated screenshots, fixed typos, steps and markdown tags
2023-08-02	2.6	Dr. Pooja	Updated the screenshots, included variations to perform tasks
2023-06-23	2.5	Pooja Patel	Added new task
2022-05-19	2.4	Malika Singla	Updated dataset used
2022-02-02	2.3	Malika Singla	Updated the screenshots
2021-07-14	2.2	Malika Singla	Updated trial link
2021-06-18	2.1	Malika Singla	Updated the screenshot as per new UI
2021-03-11	2.0	Steve Ryan	Lab rearrangement
2020-09-23	1.2	Steve Ryan	Post review changes
2020-09-16	1.1	Steve Ryan	ID review
2020-09-14	1.0	Sandip Saha Joy	Initial version created

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