



## 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 placeholder text 'redacted@gmail.com'), 'First name' (Sandip Saha), 'Last name' (Joy), 'Password' (redacted), and dropdown menus 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 has a question 'Are you a student? (optional)' with radio buttons for 'Yes' (selected) and 'No'. Below it is a question 'Select Data Center (optional)' with a dropdown menu showing 'US East (Washington DC)'. At the bottom is a 'Next' button with a mouse cursor icon hovering over it.

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



This notice provides information about accessing your IBMid user account (Account). If you have previously been presented with a version of this notice, please refer to "Changes since the previous version of this notice" below for information about the new updates.

Updates to the [IBM Privacy Statement](#) since this notice was originally published provide additional information about how your personal information is processed by IBM.

Changes since the previous version of this notice



What data does IBM collect?



Why IBM needs your data



How your data was obtained



How IBM uses your data



How IBM protects your data



How long we keep your data



Your rights



I acknowledge that I understand how IBM is using my Basic Personal Data and I am at

[Cancel](#)

[Proceed](#)



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

You are on the United States site. [Rester ici](#) [Accéder au site de mon pays/ma région](#)

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

Need help? [Get product support](#)

## Products

**Trials**

1 Offering

Coursera on-line training - Data Visualizations

Activation in progress

[View support information](#)

Let IBM provide you technology and business solutions to fit your needs

IBM's extensive list of offerings helps you find products that fit your technology and business needs. Get started with a free trial today!

[View catalog](#)

Contact IBM Privacy Terms of use Accessibility Cookie preferences United States - English

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 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.

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

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

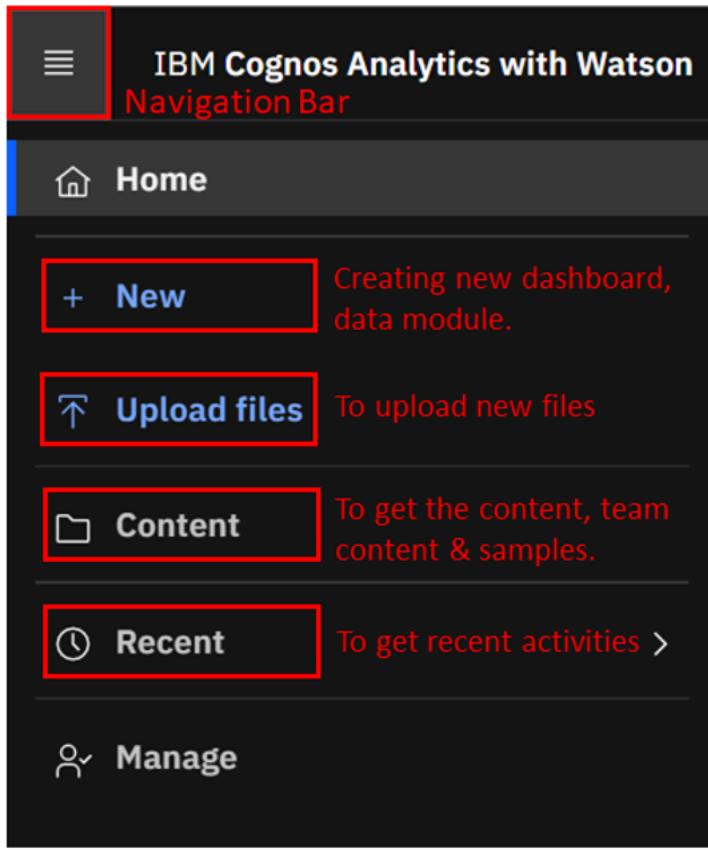
**Upload data**  
Upload or drag and drop spreadsheets, csv files, and other data sources.

**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...

**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.



- 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.

- Download the file [CustomerLoyaltyProgram.csv](#).
- To sign in to the Cognos Analytics platform with your IBMID, go to [myibm.ibm.com/dashboard/](#).
- Enter your IBMID and password.
- 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 the title, a dark banner features the text "Get quick answers with the Assistant" and a "Ask a question" input field with a blue speech bubble icon. On the right side of the banner, there's a purple speech bubble icon. In the bottom right corner of the banner, there's a "Get started" button. The main content area has a light gray background. It contains a section titled "Introduction to Cognos Analytics" with the sub-instruction "Leverage self-service analytics to make more confident decisions.". Below this, there's a red box highlighting a "To upload the dataset" section. This section includes a large blue "Upload" button with an upward arrow icon, a text input field "Upload data and start creating content", and a note "Upload spreadsheets, CSV files, and other types of files, and create content based on these files.". To the right of this, there's another section with a blue folder icon and the text "Create content from existing data" and "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.\*.

The screenshot shows the 'Upload data and start creating content' page. At the top, it says '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 containing the text 'Drag and drop file here or click to upload'. Further down, there's a link 'Want to know more about uploading data? [Learn more](#)'. At the bottom, there are 'Cancel' and 'Back' 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.

The screenshot shows the same upload interface after a file has been uploaded. A green status bar at the top right says 'CustomerLoyaltyProgram (12).csv was uploaded successfully.' with a 'Hide Details' link. Below this, the 'Add file' button is shown, followed by a red-bordered box containing the uploaded file name 'CustomerLoyaltyProgram (12).csv' and a delete icon. At the bottom, there are 'Cancel' and 'Back' buttons.

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

Select one of the available types of assets to create from the uploaded file.

**Recommended**

- Dashboard**  
Visualize and share your business performance.
- Insights in Assistant**  
Ask questions in natural language, and discover insights.

**Other options**

- Data module**  
Make meaningful connections between your data sources.
- Exploration**  
Discover and analyze data in a flexible workspace.

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

## 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.

Recent

1 item selected

Customer Loyalty Program data module

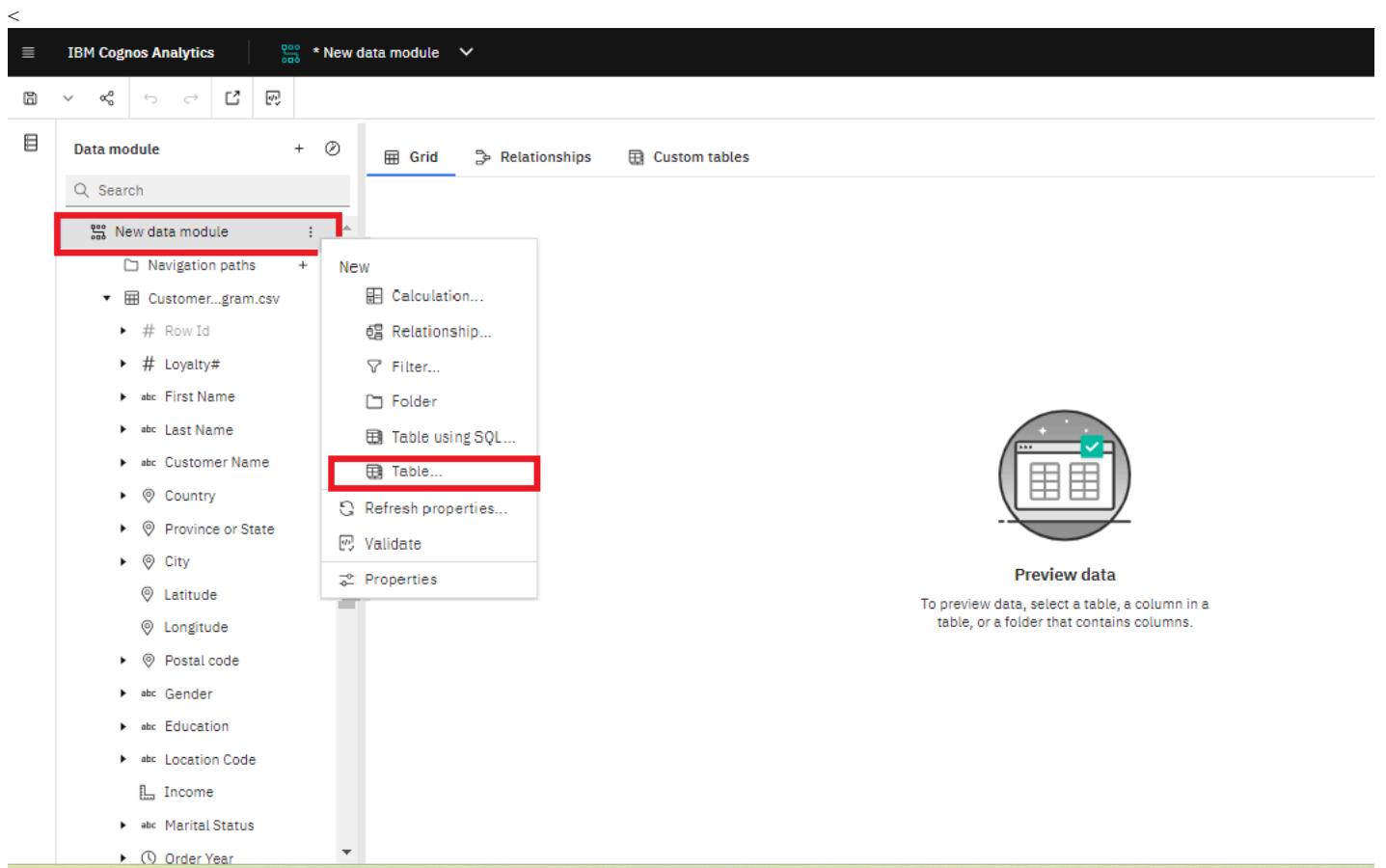
Last Accessed 9/8/2023, 5:02 AM

**Edit data module**

- Create report
- Create exploration
- Create dashboard
- Create data module
- Create data set**
- Share
- Copy or move to
- Add shortcut
- Edit name and description
- Properties
- Details
- Remove from recent
- Delete

More + Create ▾ Remove from recent

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

CustomerL...ogram.csv

Select tables

Select and add tables to create a new table from

Select tables

Shortcut to a table  create a shortcut table, select one non-package table.

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.

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

Data will appear here

Refresh

Invert Clear all

(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	Johnson	Al Johnson	United States

Invert      Clear all

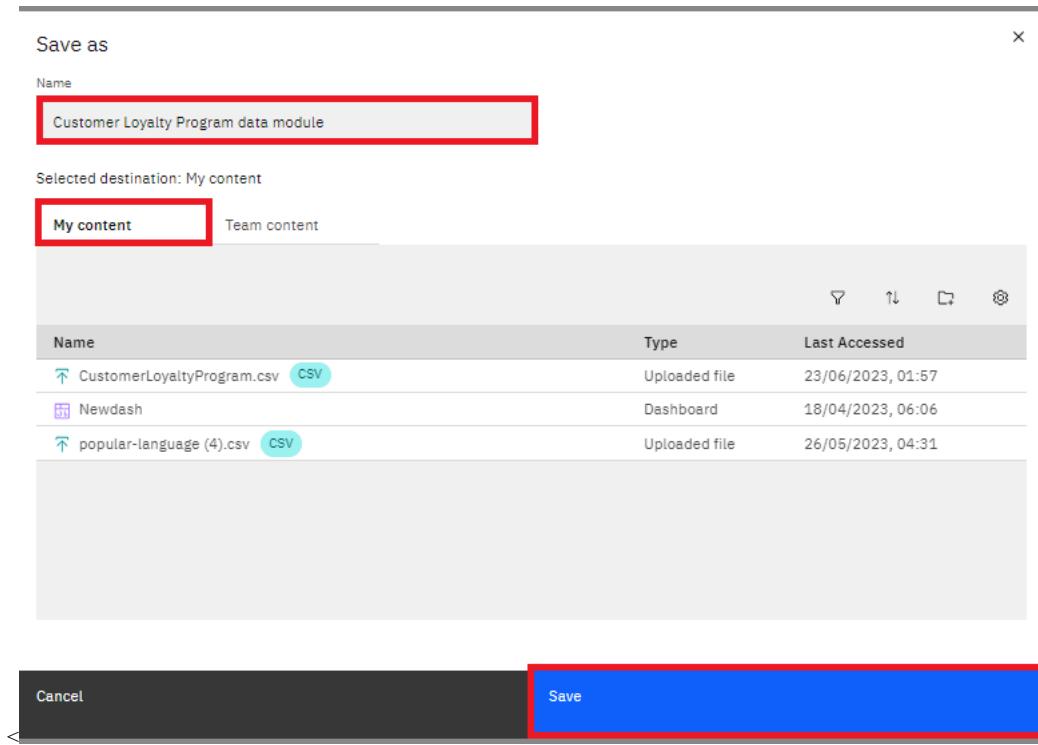
(29) columns selected.

[Previous](#)      [Cancel](#)      [Finish](#)

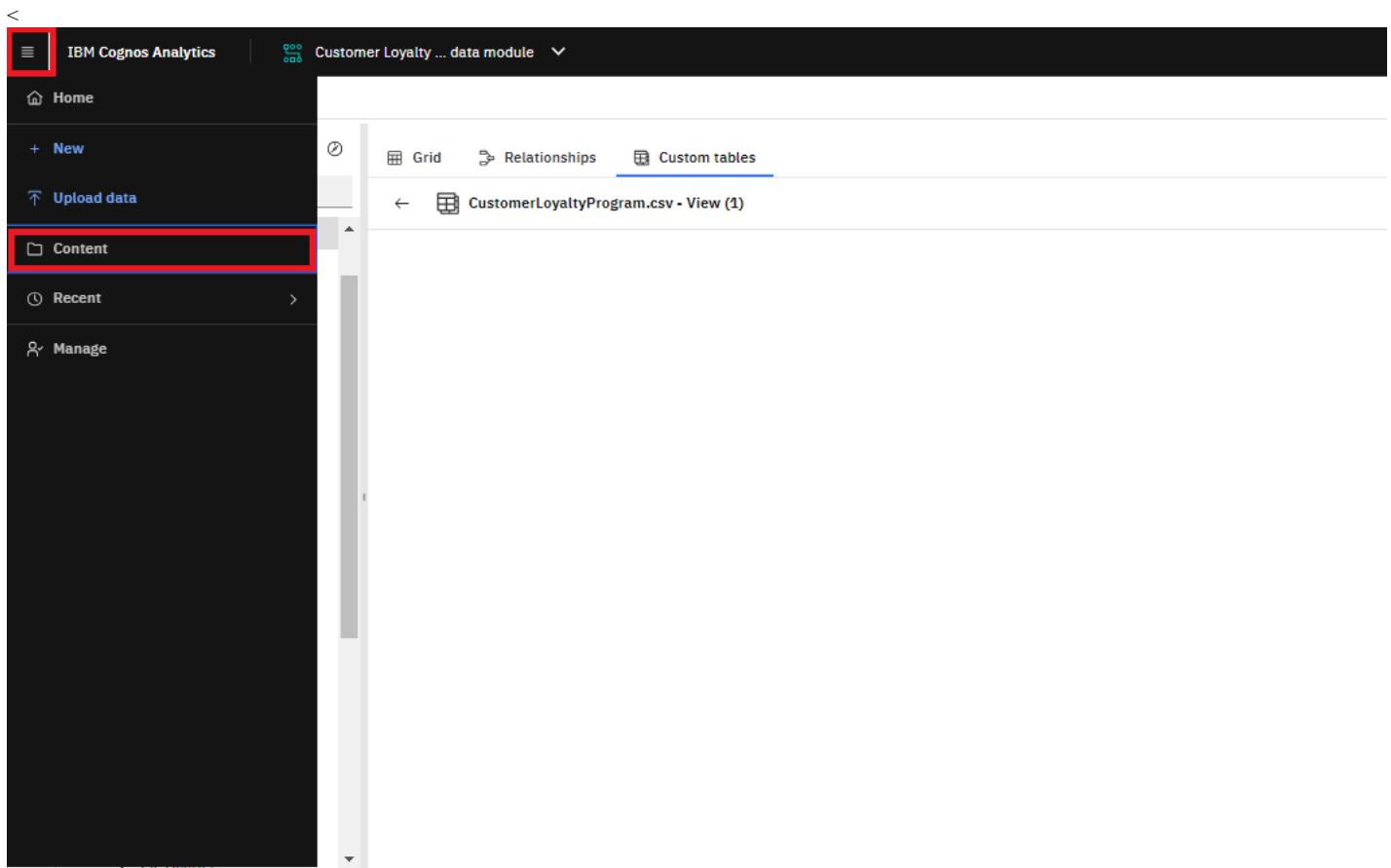
6. The new table view will be added in source panel now save this Data Module using the **Save** option.

The screenshot shows the IBM Cognos Analytics interface. The top navigation bar has a 'Save' button highlighted with a red box. Below it, the main workspace shows a 'Data module' section with a 'CustomerLoyaltyProgram.csv - View (1)' table selected. This table is also highlighted with a red box. The source panel on the left lists various columns from the CSV file, each preceded by a red arrow icon, indicating they are part of the current view.

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 navigation, the word 'Content' is displayed. A red box highlights the 'My content' tab, which is selected. Other tabs include 'Team content' and 'Samples'. The main area lists four files:

- Customer Loyalty Program data module**: Last Accessed 23/06/2023, 03:18. A red box surrounds this item.
- CustomerLoyaltyProgram.csv**: Last Accessed 23/06/2023, 01:57. Includes a 'CSV' button and a download icon.
- Newdash**: Last Accessed 18/04/2023, 06:06. Includes a dashboard icon.
- popular-language (4).csv**: Last Accessed 26/05/2023, 04:31. Includes a 'CSV' button and a download icon.

## 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 navigation bar. It displays a single item from the recent uploads:

- CustomerLoyaltyProg...**: Last Modified 6/7/2021, 1:56 AM. A red box surrounds this item.

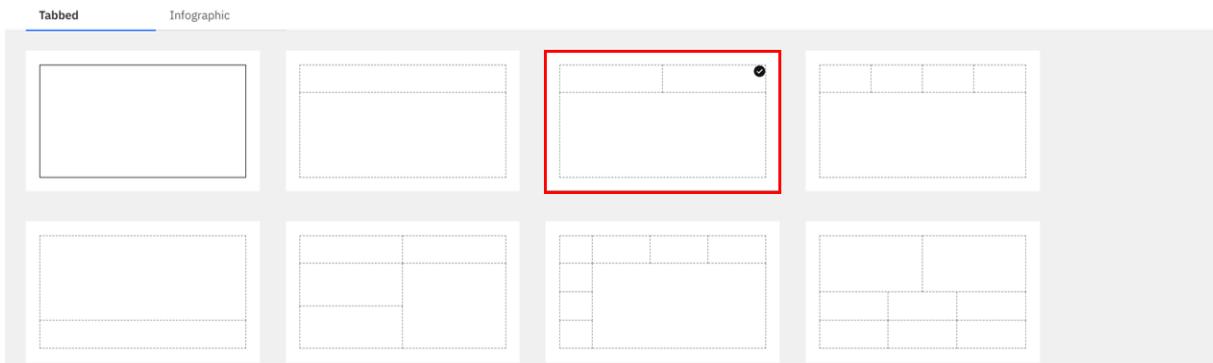
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.

## Create a dashboard

Select a template for your dashboard

Cancel

Create



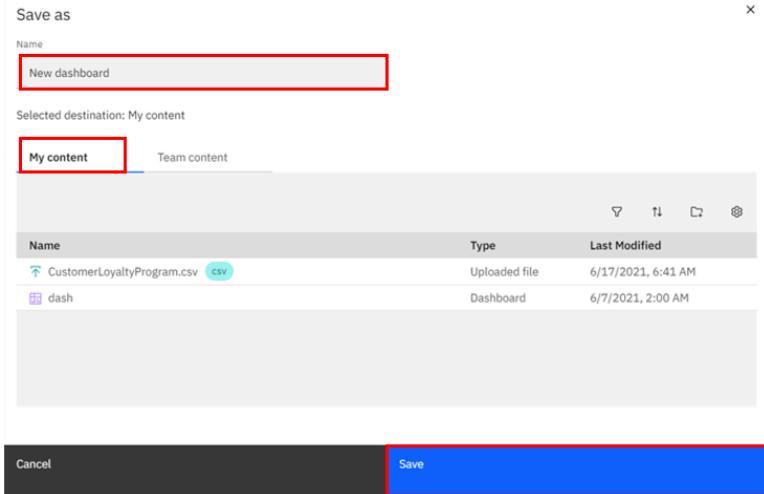
3. Now you have created a new dashboard using the dashboard template.

update

The screenshot shows the dashboard creation interface with several components highlighted by red boxes:

- Application Toolbar:** Located at the top, featuring various icons for file operations like Open, Save, Print, and Undo.
- Navigation Panel with Dashboard Toolbox:** On the left, containing icons for Home, Recent, Favorites, and a search bar labeled 'Selected sources / CustomerLoyaltyProgram.csv'. It also includes a 'Data Source Panel' section listing fields from the CSV file.
- Data Source Panel:** A detailed list of fields from the 'CustomerLoyaltyProgram.csv' file, including 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 dock area at the top right where users can drag and drop data to filter all tabs or specific tabs.
- Dashboard Template:** The main workspace where a tab titled 'Tab 1' is currently active.

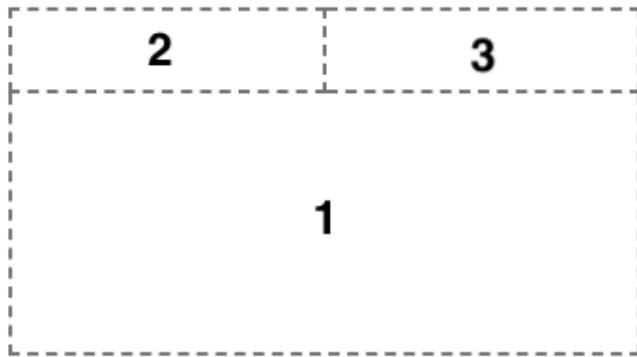
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



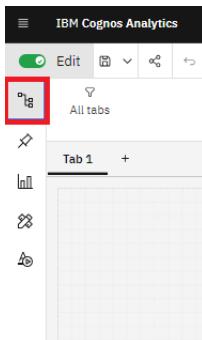
## Task D: Create a Simple Dashboard

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 \*\*stomerLoyaltyProgram.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**.

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

Drag and drop data here to filter all tabs.

...

All tabs

Tab 1

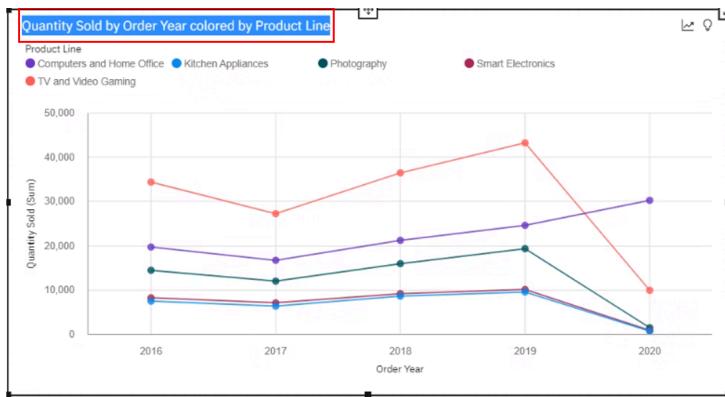
This tab

Drop here to move

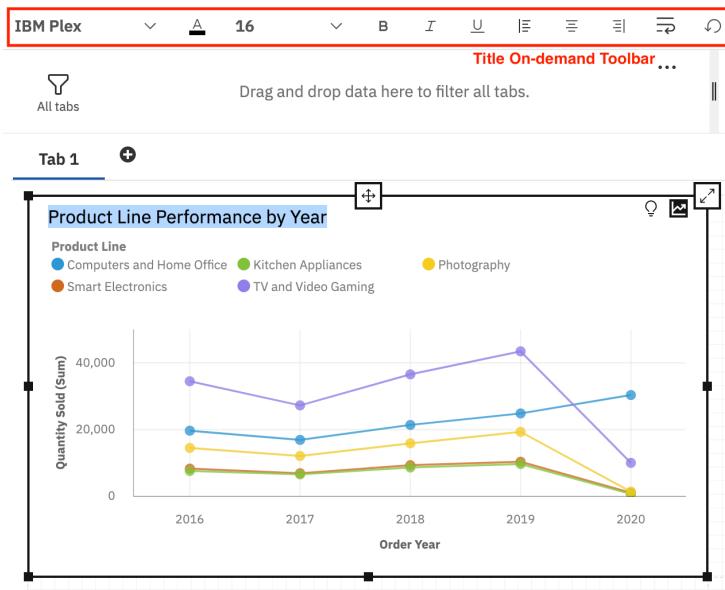
Order Year  
abc Product Line  
Quantity Sold

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.

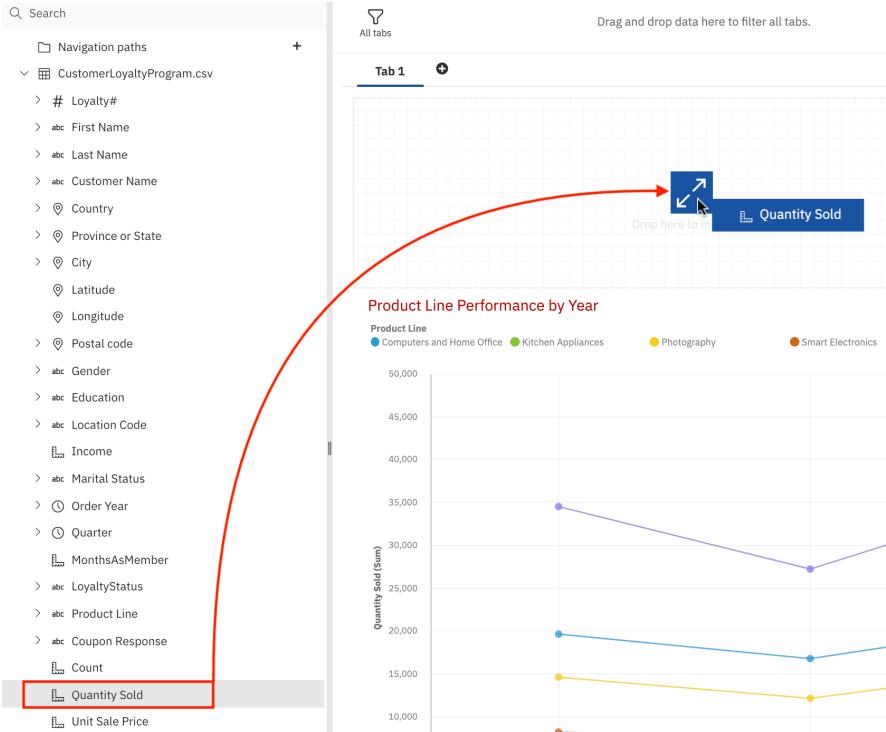


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.

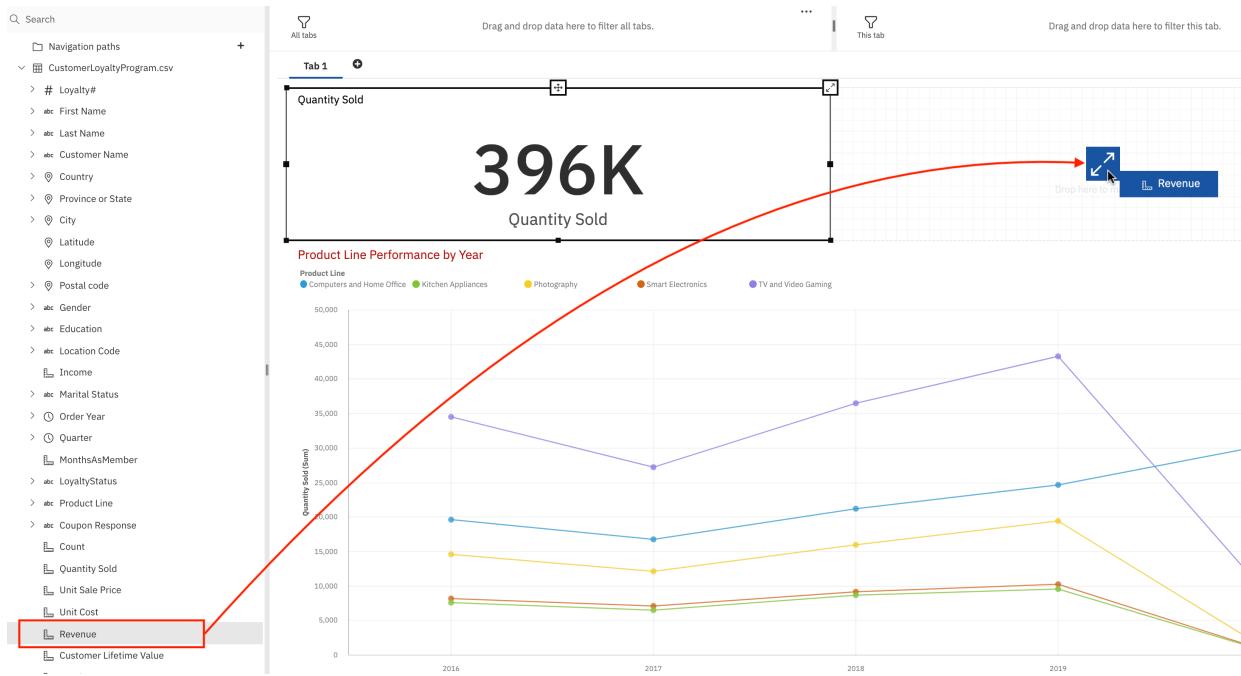


7. Click the **Color picker icon**, and change the color to **Red**, then click the font size drop-down and choose **18**.

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”<sup>12</sup>. 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

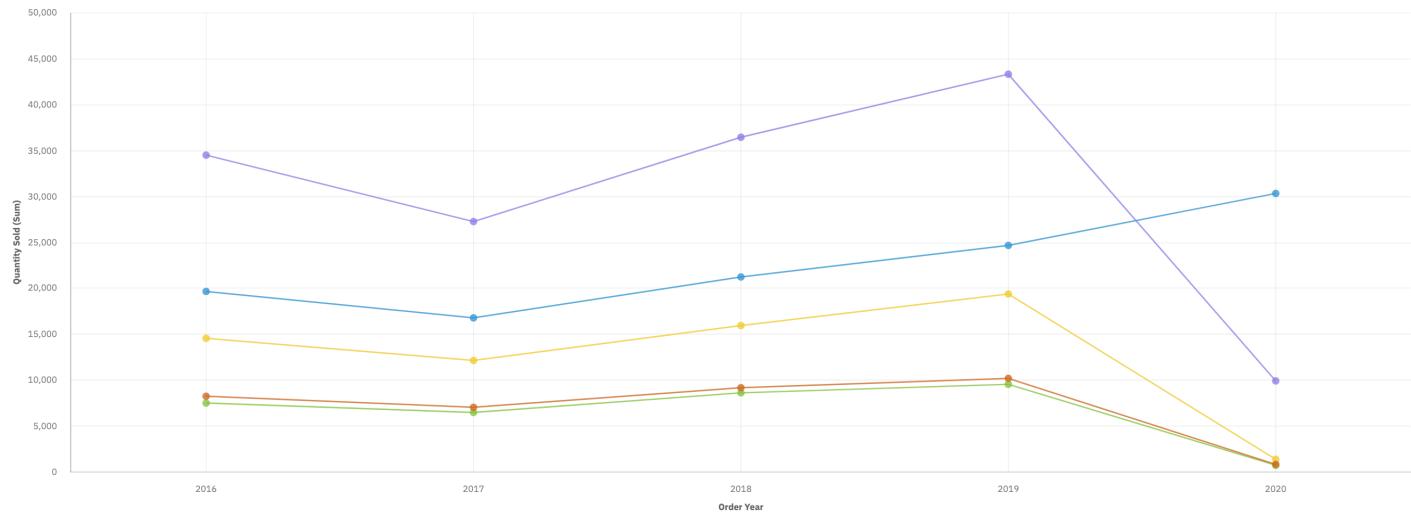
● Computers and Home Office

● 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)

[Sandip Saha Joy](#)

## Other Contributor(s)

[Steve Ryan](#)

© IBM Corporation 2020. All rights reserved.