

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. Source: https://www.ibm.com/cloud/garage/dte/tutorial/ibm-cognos-analytics-1113-getting-started-exploration-0. This dataset is published by IBM. You can download the dataset file directly from here: CustomerLoyaltyProgram.csv

Objectives

After completing this lab, you will be able to:

- Sign up for a Cognos Analytics trial plan and navigate around the Cognos Analytics user interface.
- Upload external data files to the Cognos Analytics platform.
- Start a new dashboard with dashboard templates.
- Create a simple dashboard.

Exercise 1: Sign up for Cognos Analytics Trial Plan

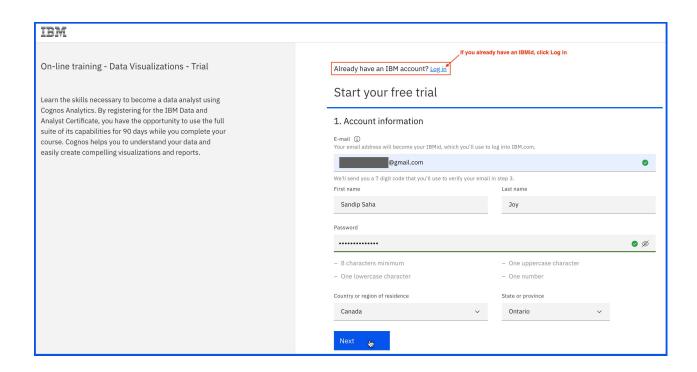
In this exercise, you will learn how to sign up for an IBM Cognos Analytics trial plan.

1. Go to Try IBM Cognos Analytics.

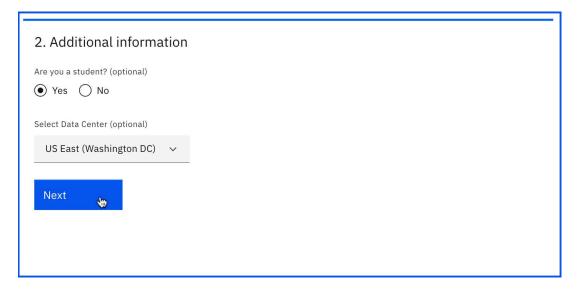
Note- If you use your existing cloud account, you will get only 30 days trial for Cognos Analytics.

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

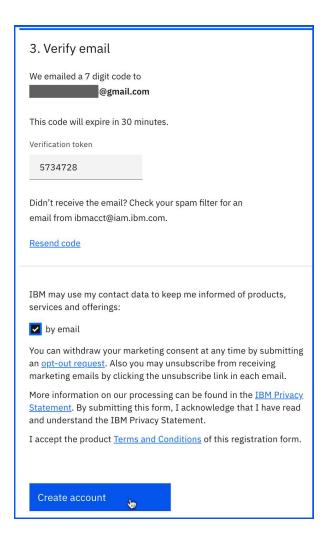
If you already have an IBMid, click Log in. Enter your IBMid and password.



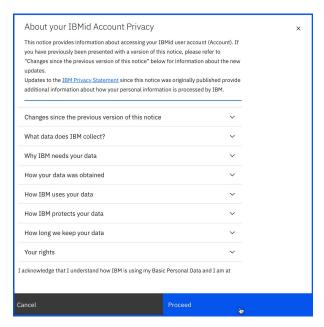
3. Fill out section 2. Additional information with your information. In the case of the Data Center, select one which is nearest to your location. Then click **Next**.



4. Now enter the 7 digit code you received on your email address and click Create account.



5. Click Proceed.



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



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



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. Enter your IBMid and password. Repeat step 7 and 8.



Exercise 2: Navigate around Cognos Analytics UI

In this exercise, you will learn general navigation around the Cognos Analytics user interface.

1. The goal of the Cognos Analytics user interface (UI) is to provide you with a streamlined way to get started using Cognos Analytics and view content and activities pertinent to them. You will begin your general navigation here.



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.



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 <u>CustomerLoyaltyProgram.csv</u>.
- 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.



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 **New > 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**, then browse to the file download location, select the CSV file, and click **Open**.



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



7. Once it completes, the status bar will update to show the successful completion before closing.
8. In the Recent section, you will see the new uploaded data file.
Task B: 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 .
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 .
3. Now you have created a new dashboard using the dashboard template.
4. To save the newly created dashboard, press CTRL+S. Select My content as Destination. On the Save as: text field, write "Simple dashboard", and click Save.
Task C: 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.
3. From the Data Source panel, press CTRL and select Order Year, Quantity Sold, Product Line and drag it to the center of Panel 1 , releasing them once you see the drop zone turn blue .
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's 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:



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

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Changelog

Date	Version	Changed by	Change Description
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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