



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 Cognos Analytics trial sign-up process. On the left, there's a sidebar with the IBM logo and a brief description of the trial. The main form is titled 'Start your free trial'. Step 1, 'Account information', is active. It includes fields for E-mail (with placeholder '@gmail.com'), First name (Sandip Saha), Last name (Joy), Password (redacted), and Country or region of residence (Canada). A note says 'We'll send you a 7 digit code that you'll use to verify your email in step 3.' To the right, there's a note 'If you already have an IBMid, click Log in' with a red arrow pointing to the link. At the bottom is a 'Next' button.

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

[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/ automatically. Wait for some moment until the Coursera on-line training - Data Visualizations trial offering becomes active.

The screenshot shows the IBM dashboard interface. At the top, there's a yellow header bar with links for 'United States', 'Rester ici' (Stay here), and 'Accéder au site de mon pays/ma région' (Access my country website). The main navigation bar includes 'IBM', 'My IBM', 'Profile', 'Billing', 'Search', and a user icon. The user is identified as 'IBMid: [REDACTED]@gmail.com'. A 'Need help? Get product support' link is also present.

The main content area is titled 'Products'. It displays a 'Trials' section with one offering: 'Coursera on-line training - Data Visualizations'. This offering has a status of 'Activation in progress' and a 'View support information' button. To the right of this, there's a promotional message: 'Let IBM provide you technology and business solutions to fit your needs' followed by a 'View catalog' button. At the bottom of the page, there are links for 'Contact IBM', 'Privacy', 'Terms of use', 'Accessibility', and 'Cookie preferences', along with a language selection dropdown set to 'United States - English'.

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

Products

Trials

1 Offering

The screenshot shows a card for a trial offering. At the top is a small line graph icon. Below it, the title "Coursera on-line training - Data Visualizations" is displayed. A green "Active" status indicator and a note that it expires on Jan 24, 2021, are shown. At the bottom are two buttons: "Launch" (with a cursor icon) and "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.

The screenshot shows the IBM Cognos Analytics homepage. On the left is a sidebar with links for Home, Search, My content, Team content, and Recent. The main area features a welcome message "Hello. Welcome to IBM Cognos Analytics." and four cards: "Take a quick tour", "How-to videos", "Samples", and "Accelerator catalog". To the right is a "Knowledge Center" sidebar with a "Trial access 90 days left" summary, an "Upgrade" button, and a list of video tutorials. At the bottom are sections for "Recent" and "Community".

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.

Log in to IBM

IBMid [Forgot IBMid?](#)

Remember Me [\(i\)](#)

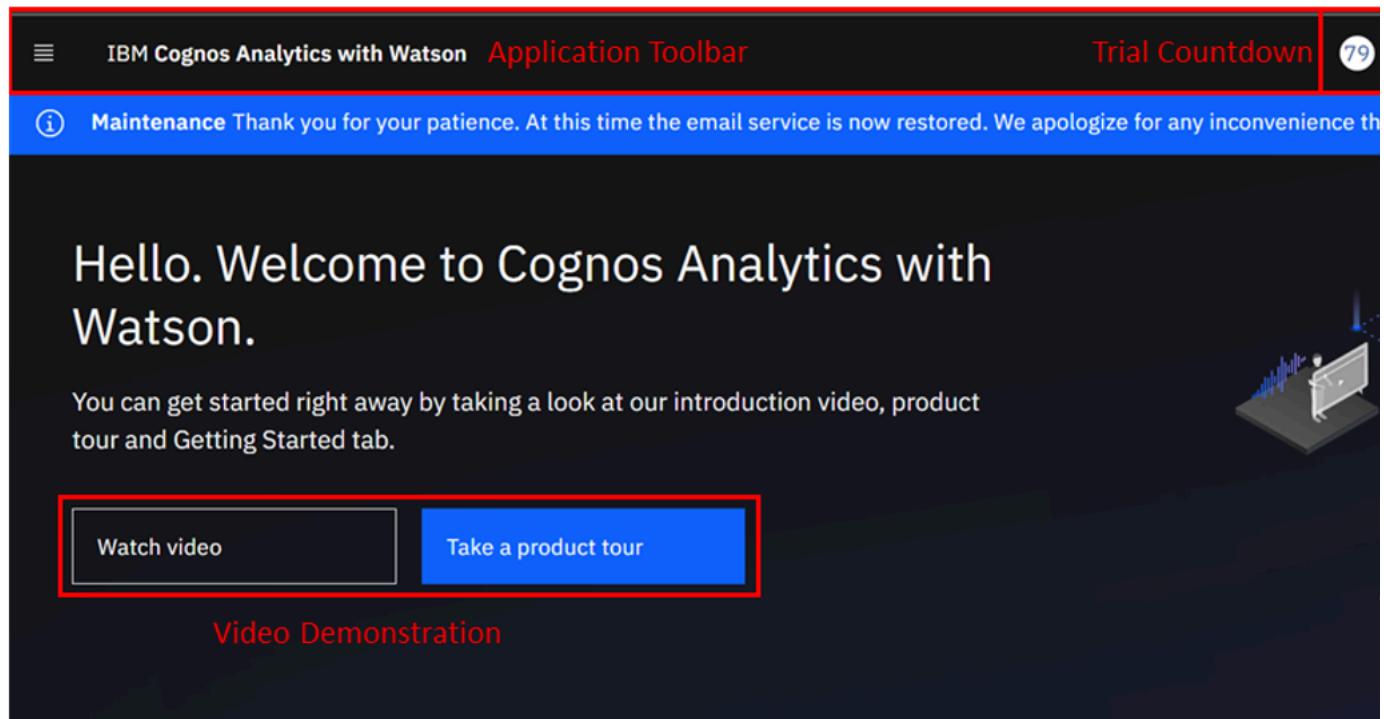
Continue 

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.

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.



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

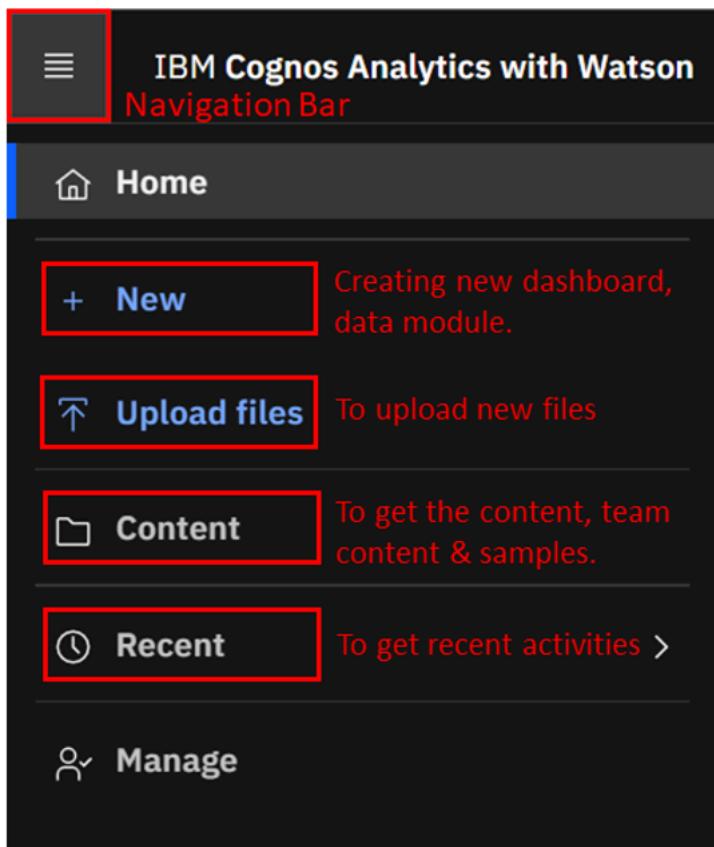
 **Upload data**
Upload or drag and drop spreadsheets, csv files, and other data sources.

 **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.



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

The screenshot shows a product trial card. At the top is a small line chart icon. Below it, the text "IBM Cognos Analytics on Cloud - Trial" is displayed. A green "Active" status indicator is followed by the text "Expires on Oct 16, 2020". At the bottom are two buttons: a dark blue "Launch" button with a hand cursor icon, and a white "Manage" button with a blue border.

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, the title "IBM Cognos Analytics", and a search bar. Below the bar, a message says "Get quick answers with the Assistant" and "Ask the Assistant a question in your own words to uncover insights about your data." On the right, there's a blue speech bubble icon. The main area has a light blue header with the text "Introduction to Cognos Analytics" and "Leverage self-service analytics to make more confident decisions." A red box highlights a section titled "To upload the dataset" with the sub-instruction "Drag and drop file here or click to upload". Below this, there are two options: "Upload data and start creating content" (with an up arrow icon) and "Create content from existing data" (with a folder icon). The bottom right corner has a "Get started" button.

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

IBM Cognos Analytics

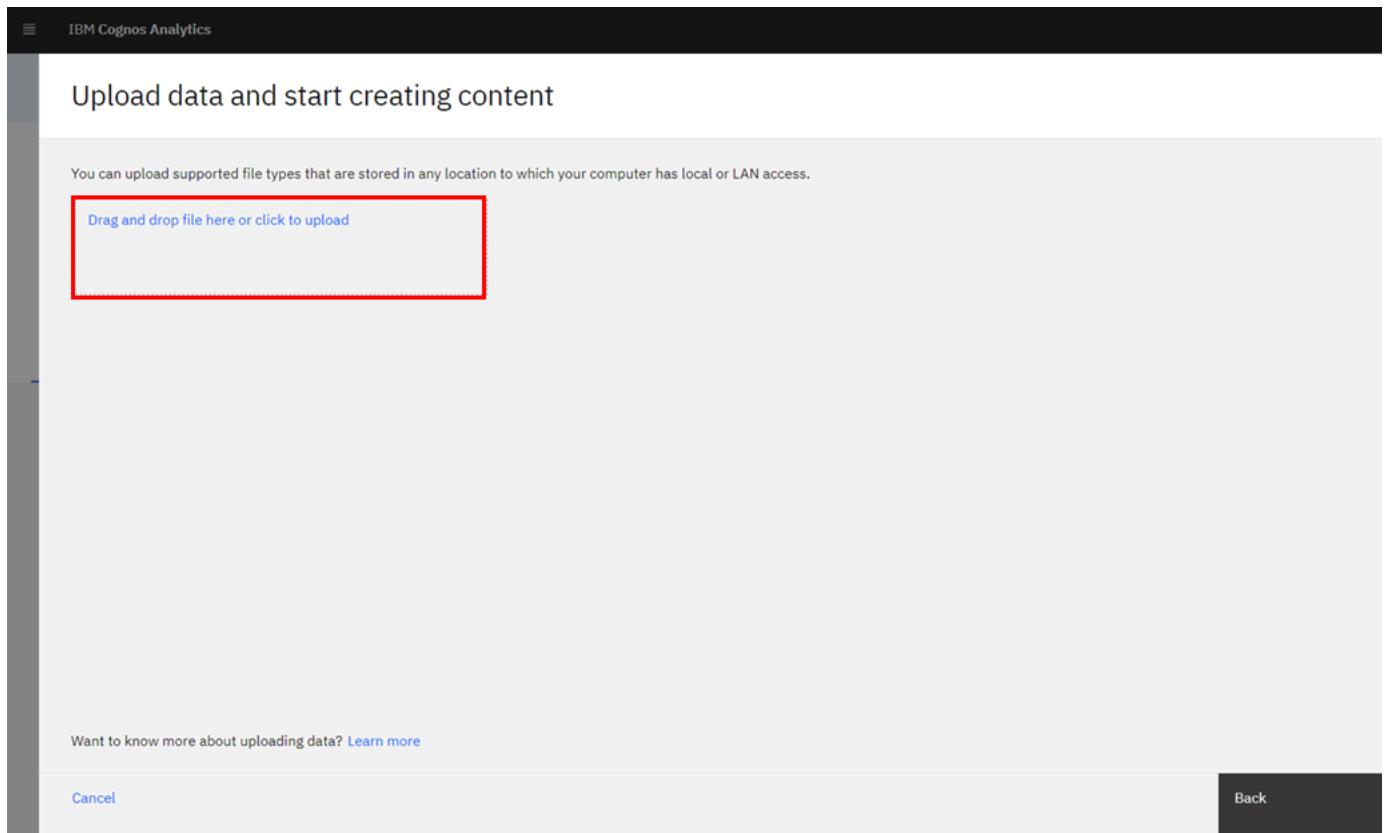
Upload data and start creating content

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](#)



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.

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IBM Cognos Analytics

Upload data and start creating content

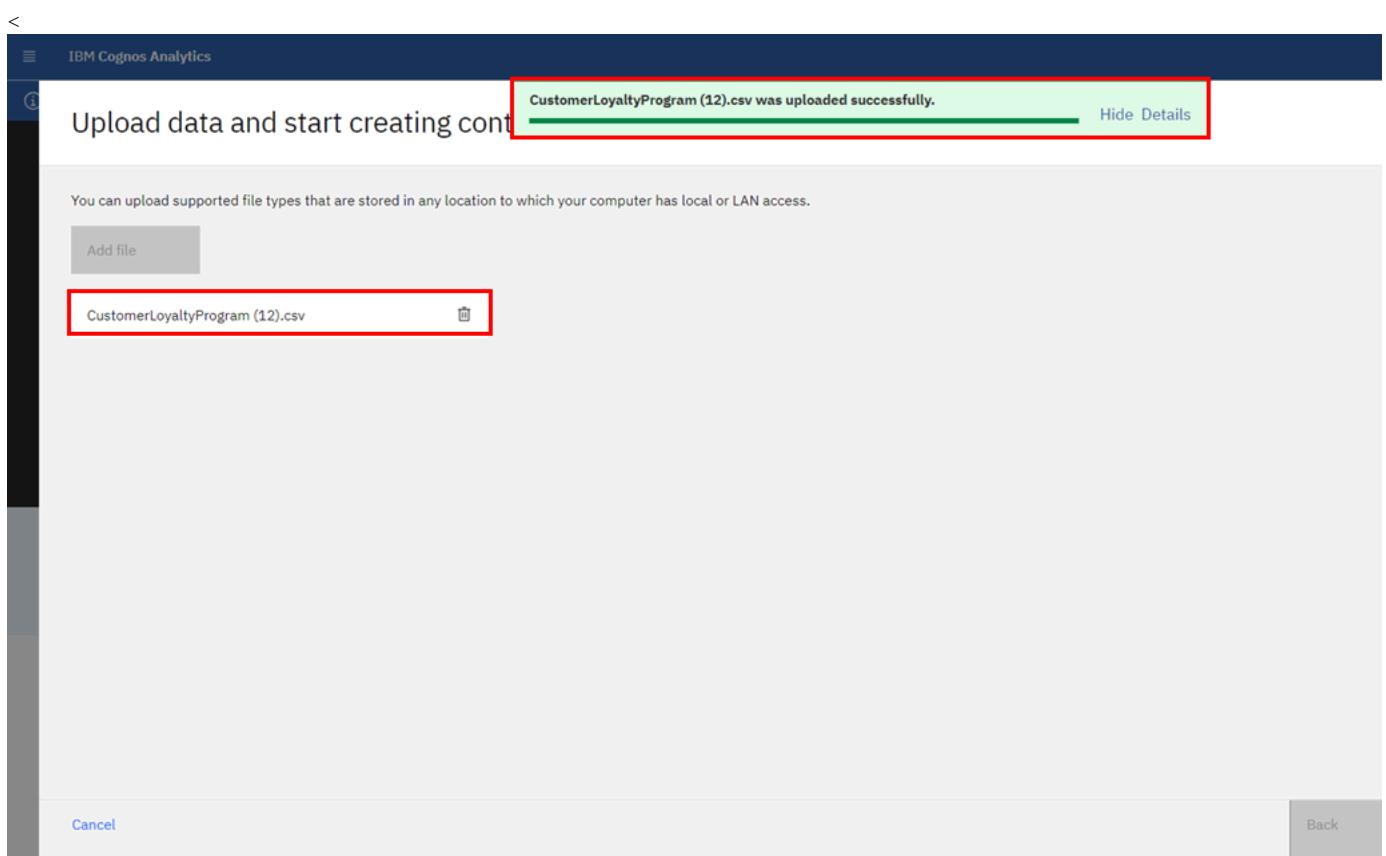
CustomerLoyaltyProgram (12).csv was uploaded successfully. [Hide Details](#)

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

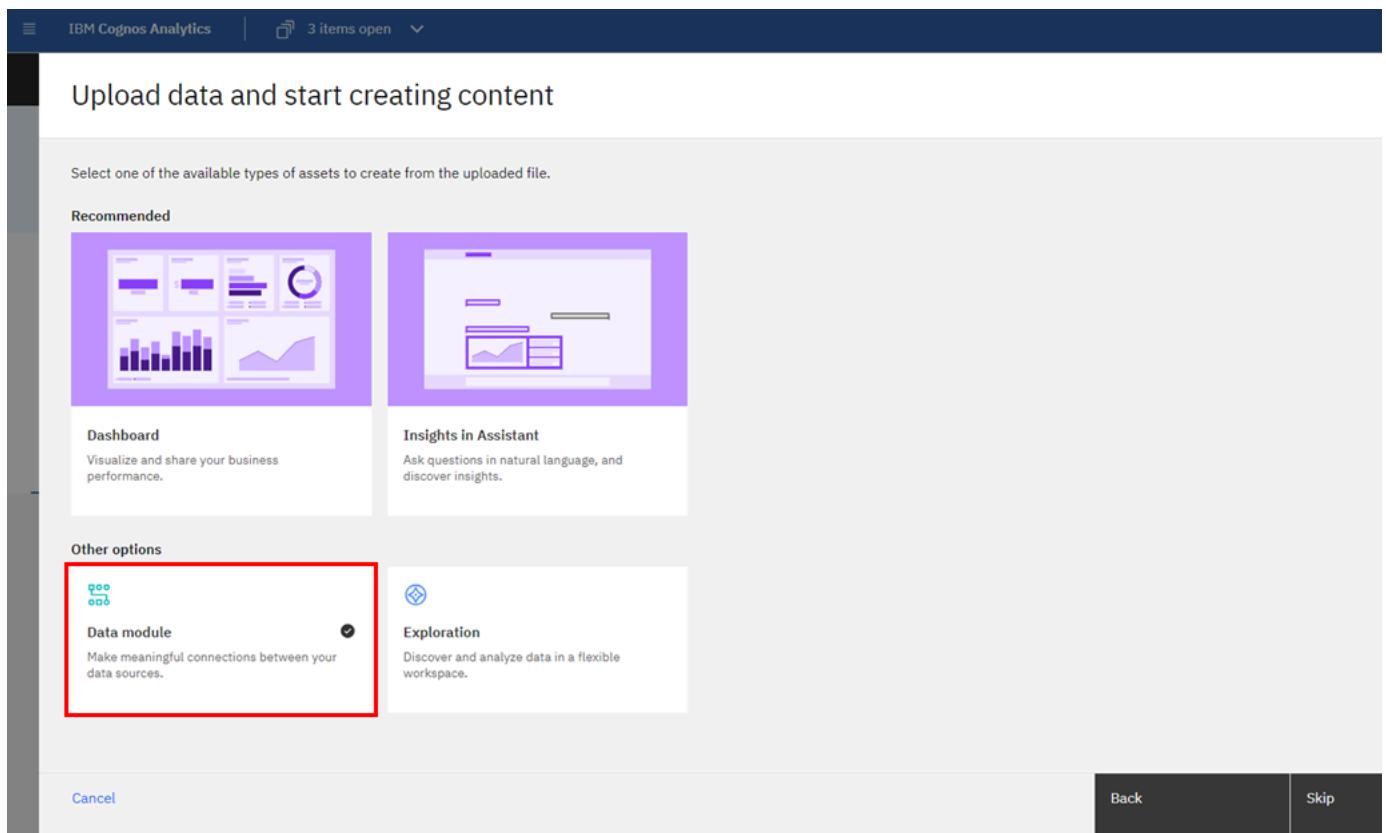
Add file

CustomerLoyaltyProgram (12).csv Delete

[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**.

The screenshot shows the IBM Cognos Analytics interface. At the top, it says 'IBM Cognos Analytics' and '1 item open'. There is a maintenance notice for 'Cognos Analytics Maintenance: 16th of September, 09:00-17:00 UTC'. Below that, it says 'Leverage self-service analytics to make more confident decisions.' On the left, there is a 'Recent' section with a list of items. One item, 'Customer Loyalty Program data module', is selected and has a red box around its action menu. The action menu options include: Edit data module (highlighted with a red box), 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, and Delete. At the bottom right of the interface, there are 'More +', 'Create ▾', and 'Remove' buttons.

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.

The screenshot shows the IBM Cognos Analytics interface. At the top, there's a navigation bar with icons for back, forward, search, and refresh. Below it is a toolbar with various icons. The main area is titled "Data module" and has tabs for "Grid", "Relationships", and "Custom tables". A search bar is present. On the left, there's a tree view of data sources, including a selected file named "CustomerLoyaltyProgram.csv". A context menu is open over this file, with the "Table..." option highlighted. To the right, there's a preview icon showing a grid and some text about previewing data.

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.

The screenshot shows the "Create table" dialog box. At the top, it says "Create a custom table in the data module. This table is not added to your data source." Below this is a "Selected tables" section with a "Find" button and a "View of tables" button. A context menu is open over a table named "CustomerLoyaltyProgram.csv", with the "Table..." option highlighted. The main area lists several options for creating a table:

- Shortcut to a table
- Alias of a table
- Copy of a table
- Joined view
- Union of tables
- Intersect of tables
- Except of tables

At the bottom, there are "Select tables" and "Next" buttons. The "Select tables" button is highlighted with a red box, and the "Next" button is also highlighted with a red box.

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)

The screenshot shows the 'Create a view of a table' dialog. On the left, a sidebar titled 'Select items' contains a 'Find' input field and a dropdown menu showing 'CustomerLoyaltyProgram.csv'. Below these are 'Invert' and 'Clear all' buttons. The main area lists columns: Row Id, Loyalty#, First Name, Last Name, Customer Name, and Country. A message 'Data will appear here' is displayed above a 'Refresh' button. At the bottom, a progress bar indicates '(29) columns selected.' and features 'Previous', 'Cancel', and a large blue 'Finish' button.

5. Now you will be able to see view the data in the table,click on the **Finish** button.

<

Create a view of a table

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

The screenshot shows the 'Create a view of a table' dialog with the 'Finish' button highlighted in red. The main area displays 12 rows of data from the CSV file, each containing values for Row Id, Loyalty#, First Name, Last Name, Customer Name, and Country. At the bottom, a progress bar indicates '(29) columns selected.' and features 'Previous', 'Cancel', and a large blue 'Finish' button.

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	Caravalho	Akilah Caravalho	Germany
12	747903	Al	Johson	Al Johson	United Stat

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 bar displays 'IBM Cognos Analytics' and a 'New data module' option. The left sidebar has a 'Save' button highlighted with a red box. Below it is a tree view of data modules and views, with 'CustomerL...View (1)' highlighted by a red box. The main pane shows a relationship diagram between 'CustomerL...ogram.csv' and 'CustomerLo...- View (1)', with the latter highlighted by a blue box.

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.

The screenshot shows a 'Save as' dialog box. It has a 'Name' field containing 'Customer Loyalty Program data module' with a red box around it. Below it is a 'Selected destination: My content' section with two tabs: 'My content' (highlighted with a red box) and 'Team content'. The main area shows a list of items with columns for Name, Type, and Last Accessed. At the bottom is a dark footer bar with 'Cancel' and 'Save' buttons, where 'Save' is highlighted with a large blue box.

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.

The screenshot shows the IBM Cognos Analytics interface. The left sidebar has a red box around the 'Content' tab. The main area shows a 'Customer Loyalty ... data module' with a 'Custom tables' tab selected. A file named 'CustomerLoyaltyProgram.csv - View (1)' is listed.

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

The screenshot shows the 'Content' tab selected in the navigation bar. The 'My content' tab is highlighted with a red box. It lists several items: 'Customer Loyalty Program data module', 'CustomerLoyaltyProgram.csv', 'Newdash', and 'popular-language (4).csv'. Each item has a last accessed date and a CSV download icon.

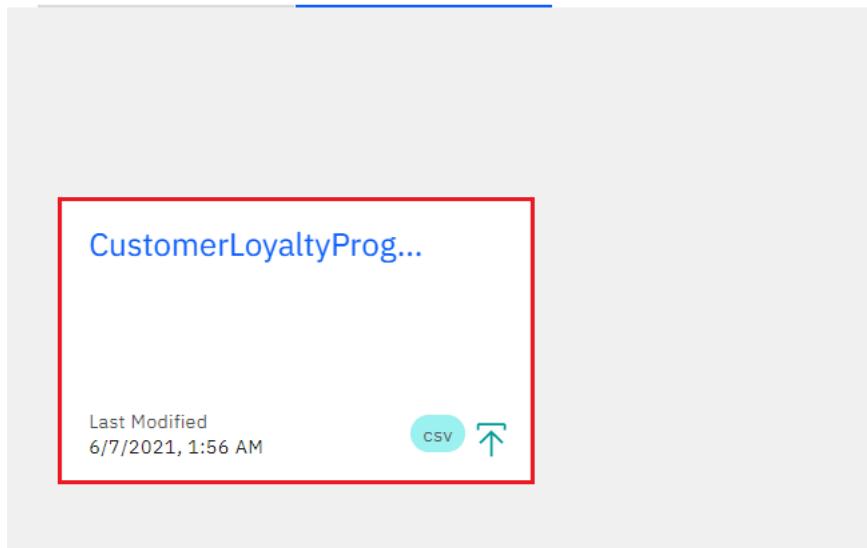
Task C: Start a New Dashboard with Templates

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

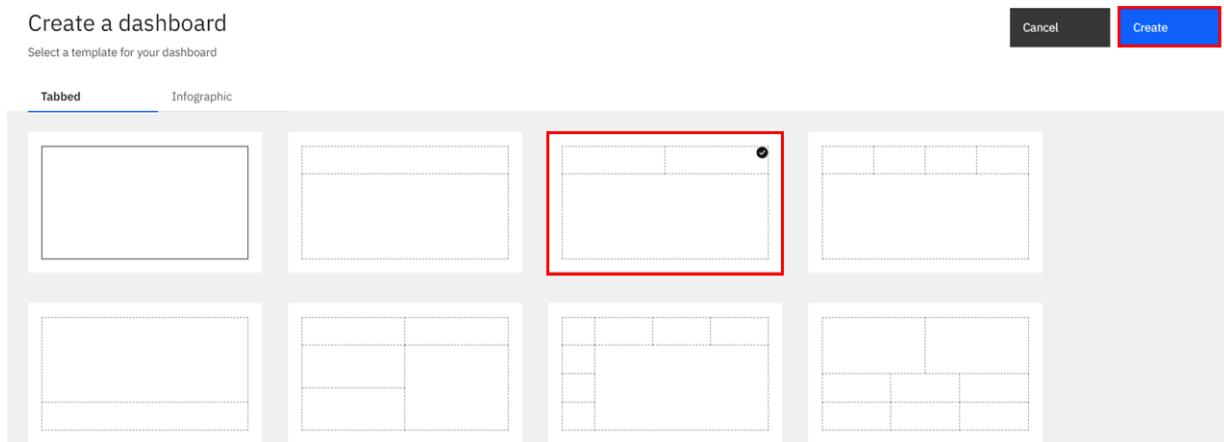
1. Click on the uploaded data file **CustomerLoyaltyProgram.csv**.

Get started

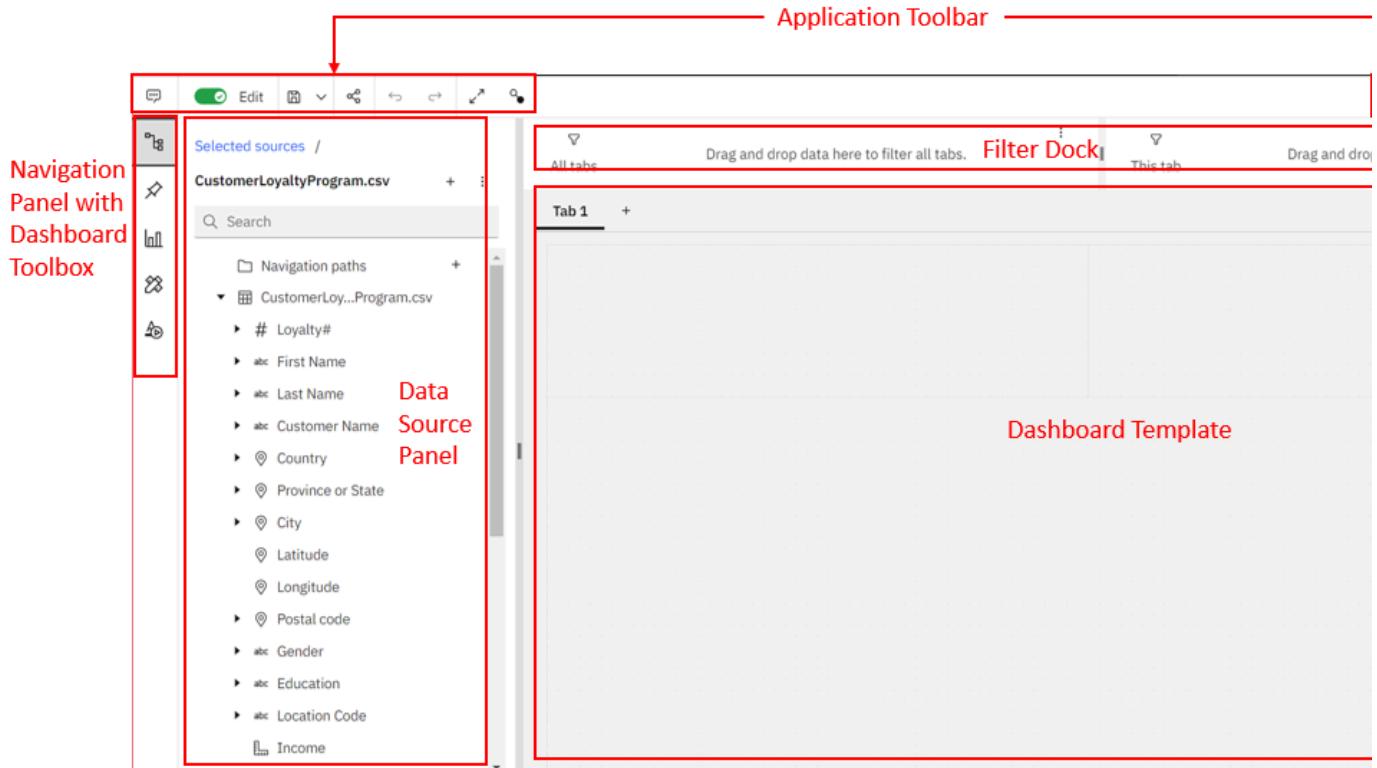
Recent



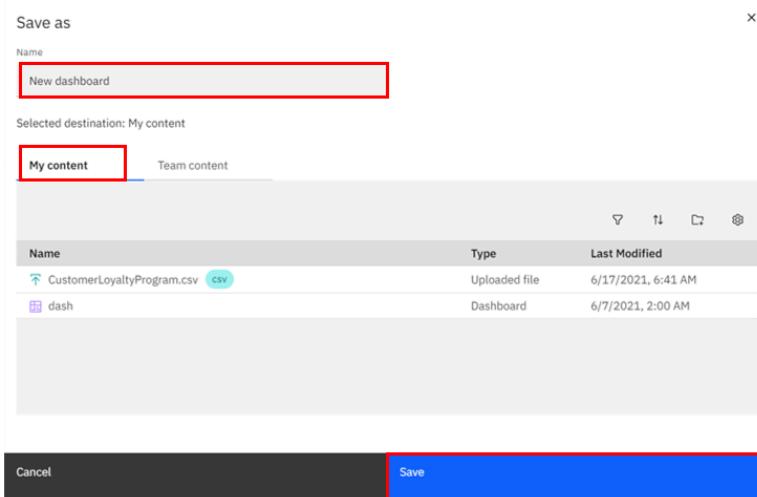
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.



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



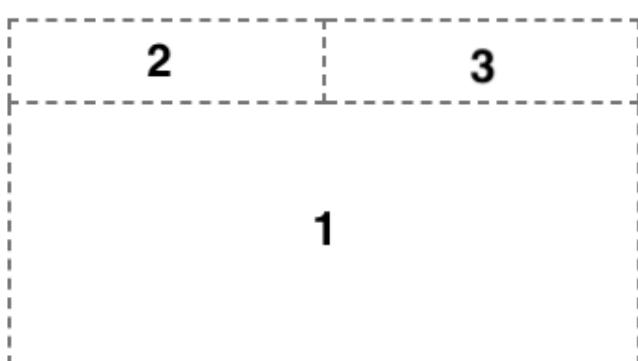
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



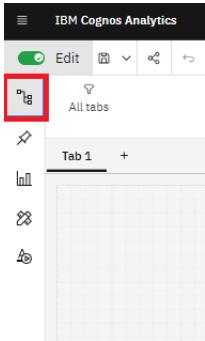
Task D: Create a Simple Dashboard

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

1. As you build the dashboard, the location placement for Widgets in the dashboard template will be referenced using the following Panel numbers.



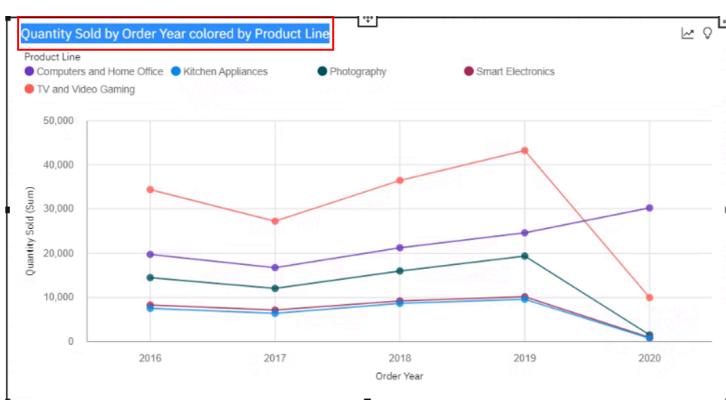
2. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the uploaded file **CustomerLoyaltyProgram.csv** as the Selected Source.



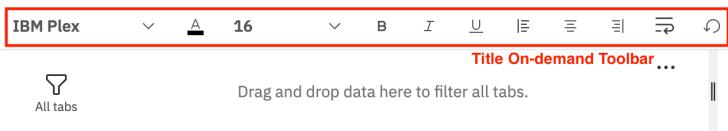
3. From the **Data Source** panel, press **CTRL** and select **Order Year**, **Quantity Sold**, **Product Line** and drag it to the center of **Panel 1**, releasing them once you see the **drop zone turn blue**.

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.



All tabs

Drag and drop data here to filter all tabs.

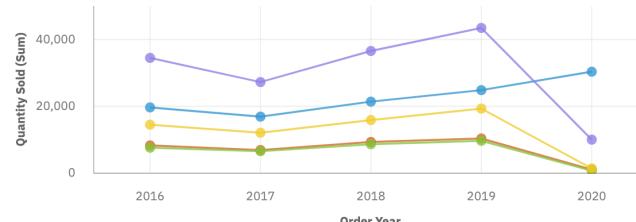
Title On-demand Toolbar ...

Tab 1

Product Line Performance by Year

Product Line
 ● Computers and Home Office
 ● Smart Electronics
 ● Kitchen Appliances
 ● TV and Video Gaming

Photography



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**.

Search

Navigation paths

CustomerLoyaltyProgram.csv

- # Loyalty#
- abc First Name
- abc Last Name
- abc 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

Drag and drop data here to filter all tabs.

Tab 1

Product Line Performance by Year

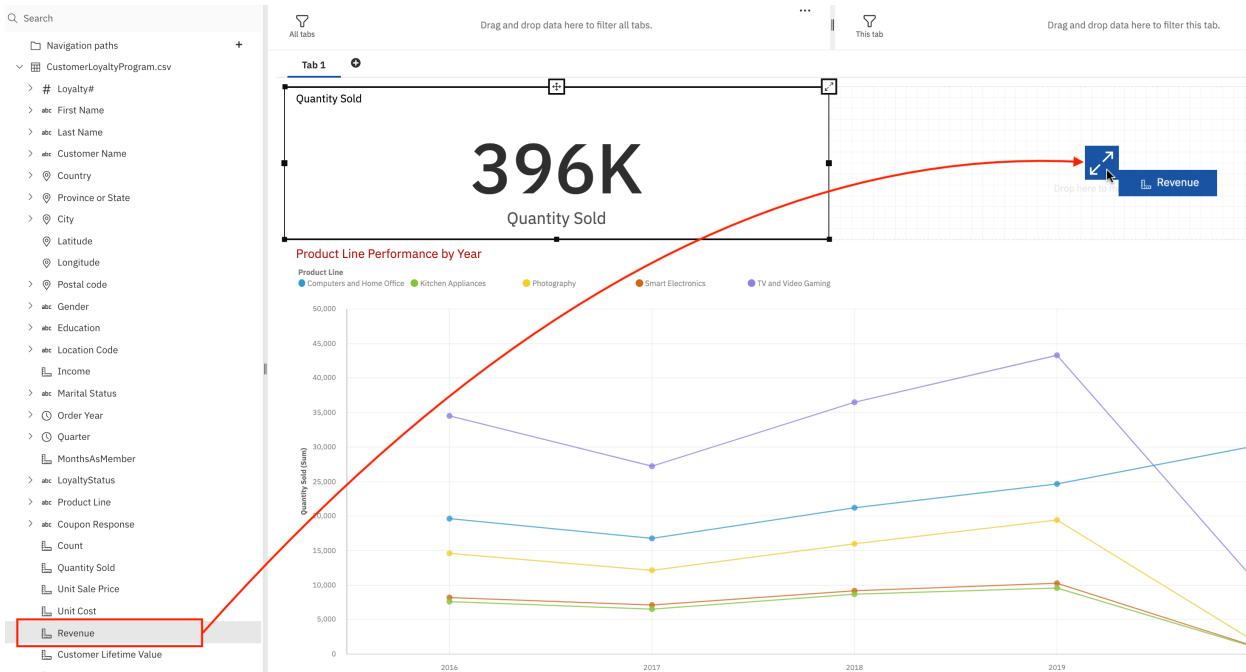
Product Line
 ● Computers and Home Office
 ● Smart Electronics
 ● Kitchen Appliances
 ● TV and Video Gaming

Quantity Sold (Sum)

Drop here to move

Quantity Sold

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**.

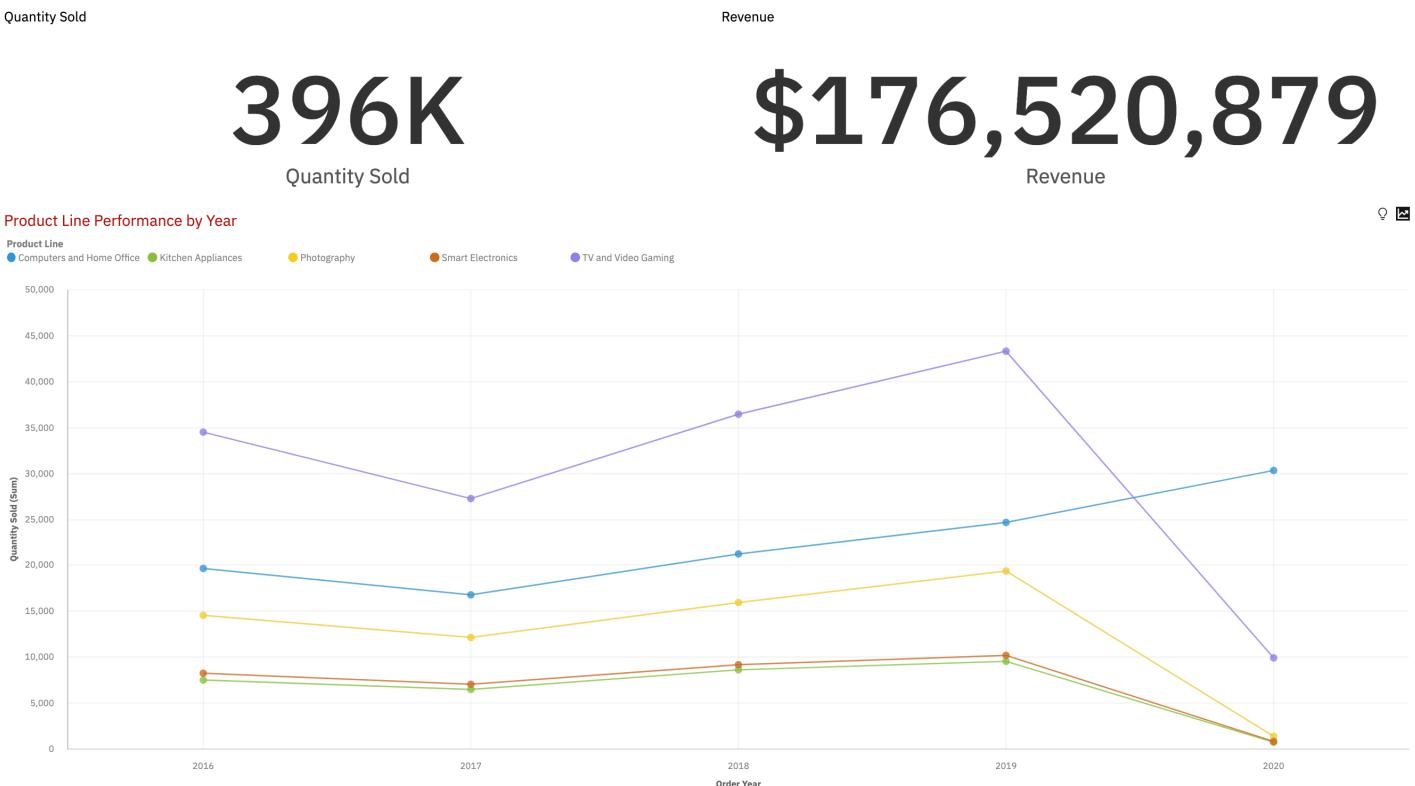


10. Click on the tab name **Tab 1** to bring up the Tab 鑫on-demand toolbar. Select the **Edit** icon.



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.

Author(s)

- [Sandip Saha Joy](#)

Other Contributor(s)

- [Steve Ryan](#)

Changelog

Date	Version	Changed by	Change Description
2023-09-08	2.6	Niveditha Pandith	Updated the screenshot
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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