



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](#).
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.



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.

Already have an IBM account? [Log in](#)

If you already have an IBMid, click Log in

Start your free trial

1. Account information

E-mail ⓘ
Your email address will become your IBMid, which you'll use to log into IBM.com.

@gmail.com

✓

We'll send you a 7 digit code that you'll use to verify your email in step 3.

First name

Last name

Sandip Saha

Joy

Password

.....

✓

👁

– 8 characters minimum

– One uppercase character

– One lowercase character

– One number

Country or region of residence

State or province

Canada

Ontario

Next

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](#)

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☒ 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**.

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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

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Why IBM needs your data

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How IBM uses your data

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How IBM protects your data

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Your rights

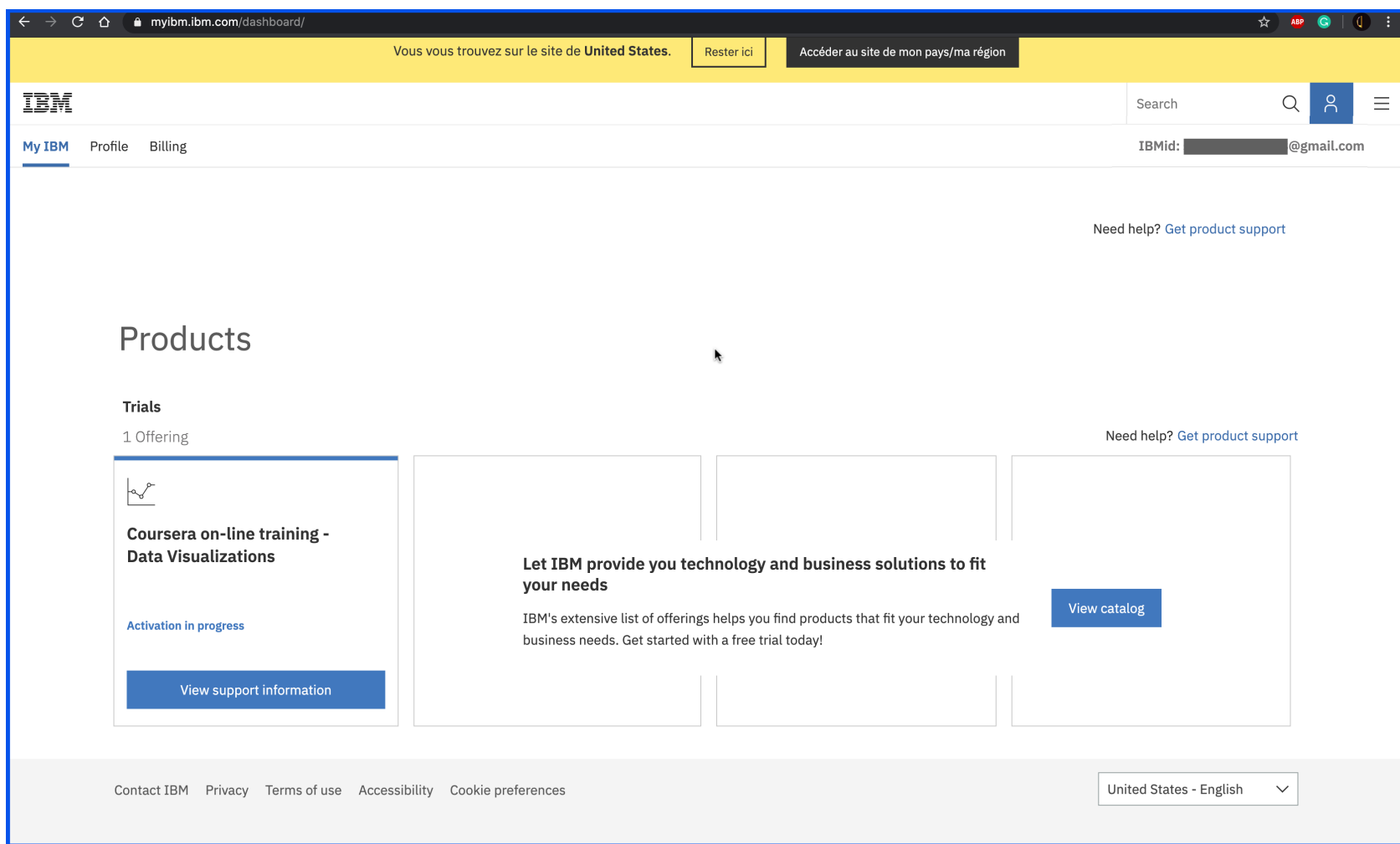
▼

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

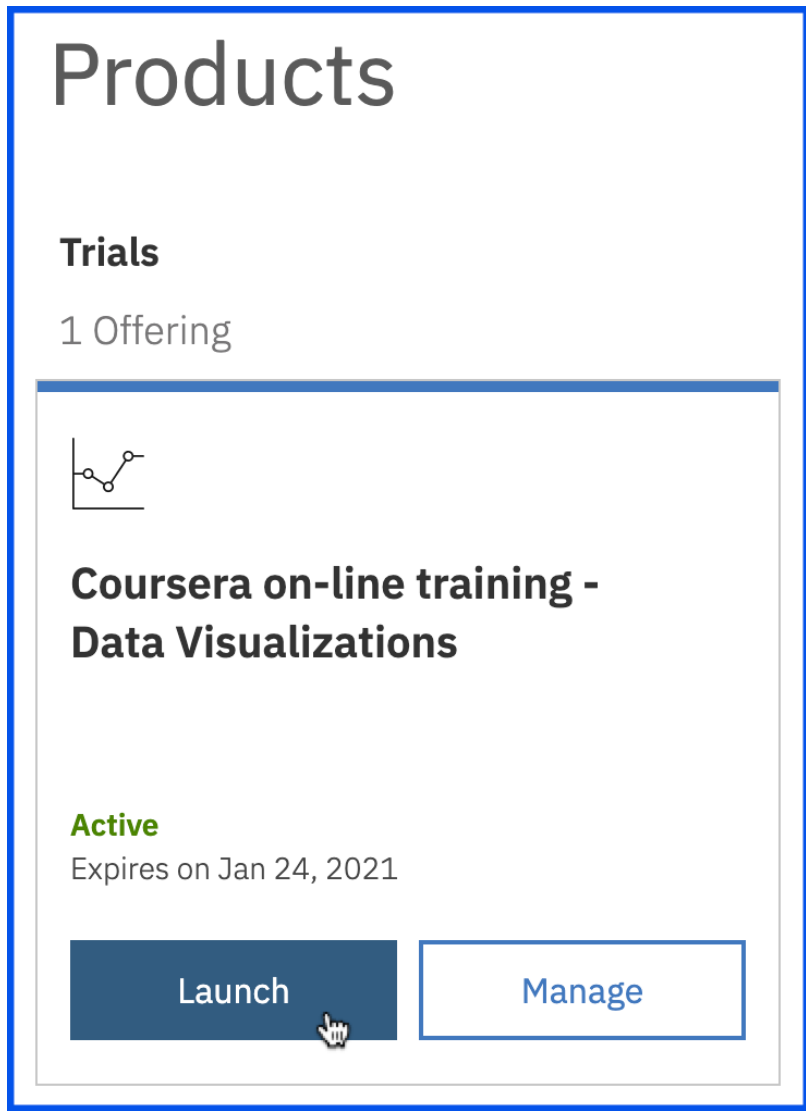
Cancel

Proceed

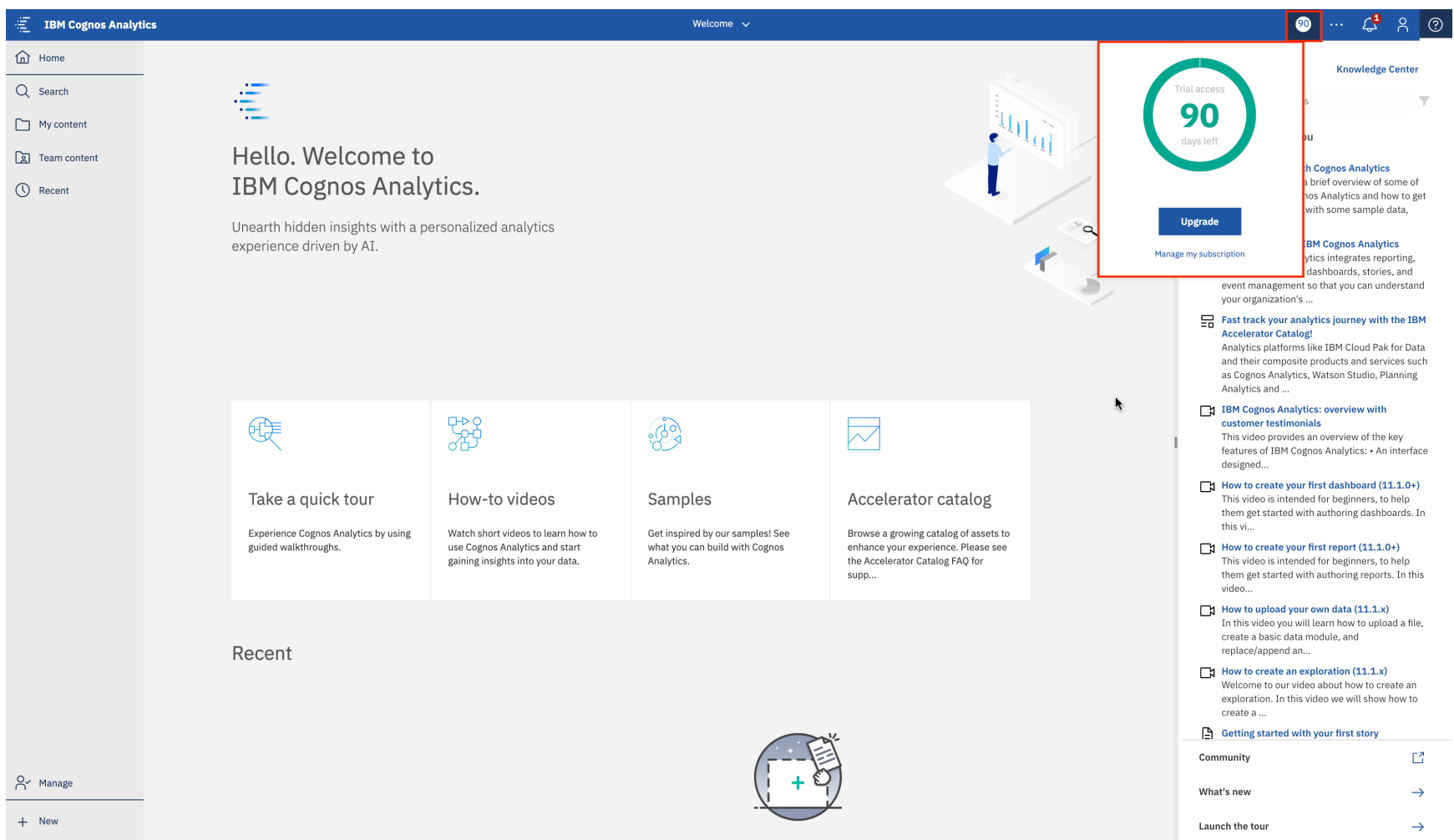
6. You are now done with the sign up procedure. You will be redirected to myibm.ibm.com/dashboard/ automatically. Wait for some moment until the Coursera on-line training - Data Visualizations trial offering becomes active.



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.

Log in to IBM

IBMid [Forgot IBMid?](#)

@gmail.com

☒ Remember Me [i](#)

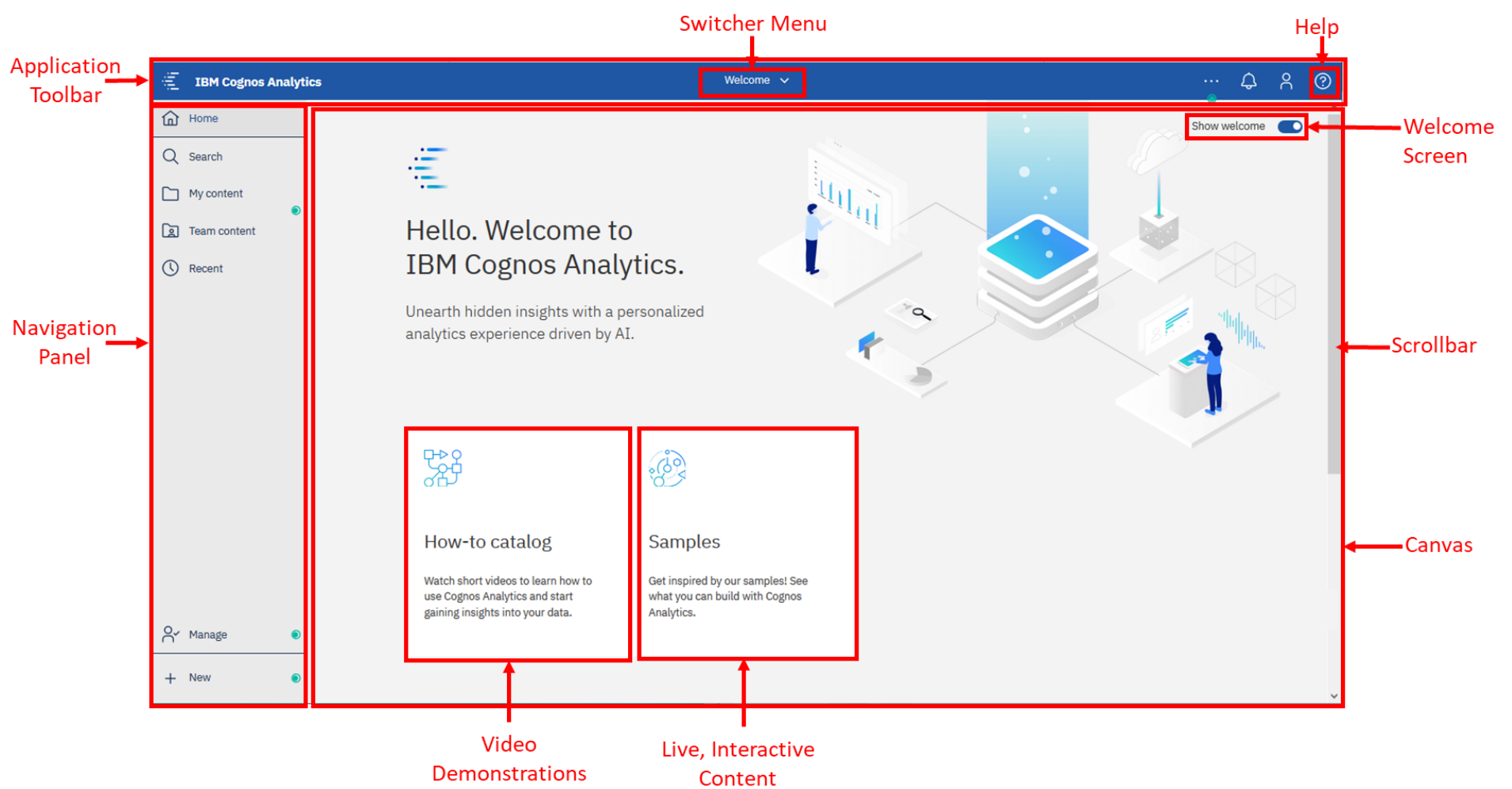
Continue

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

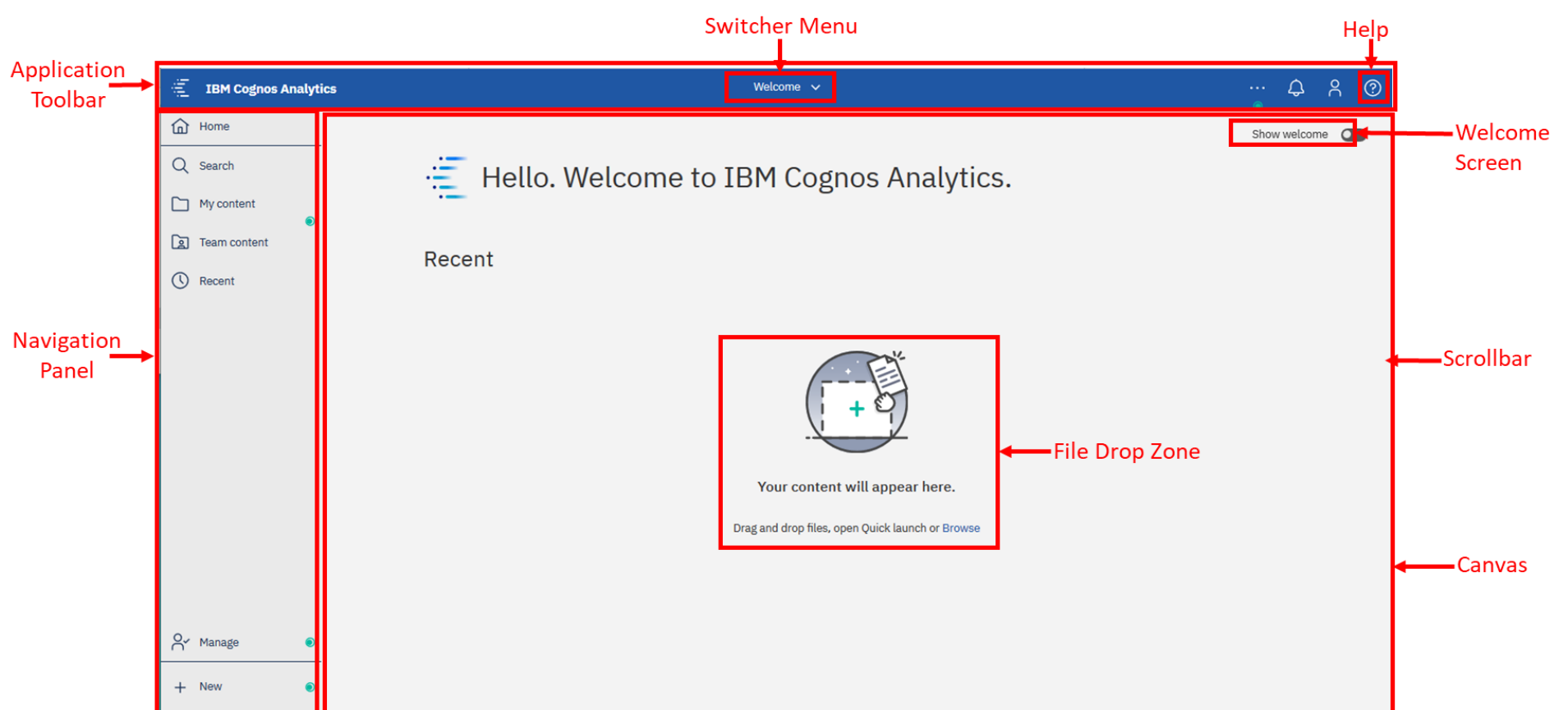
Exercise 2: Navigate around Cognos Analytics UI

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.



2. Click on the **Welcome Screen** toggle button on the upper right of the canvas to collapse the Welcome Screen's Getting Started content. 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

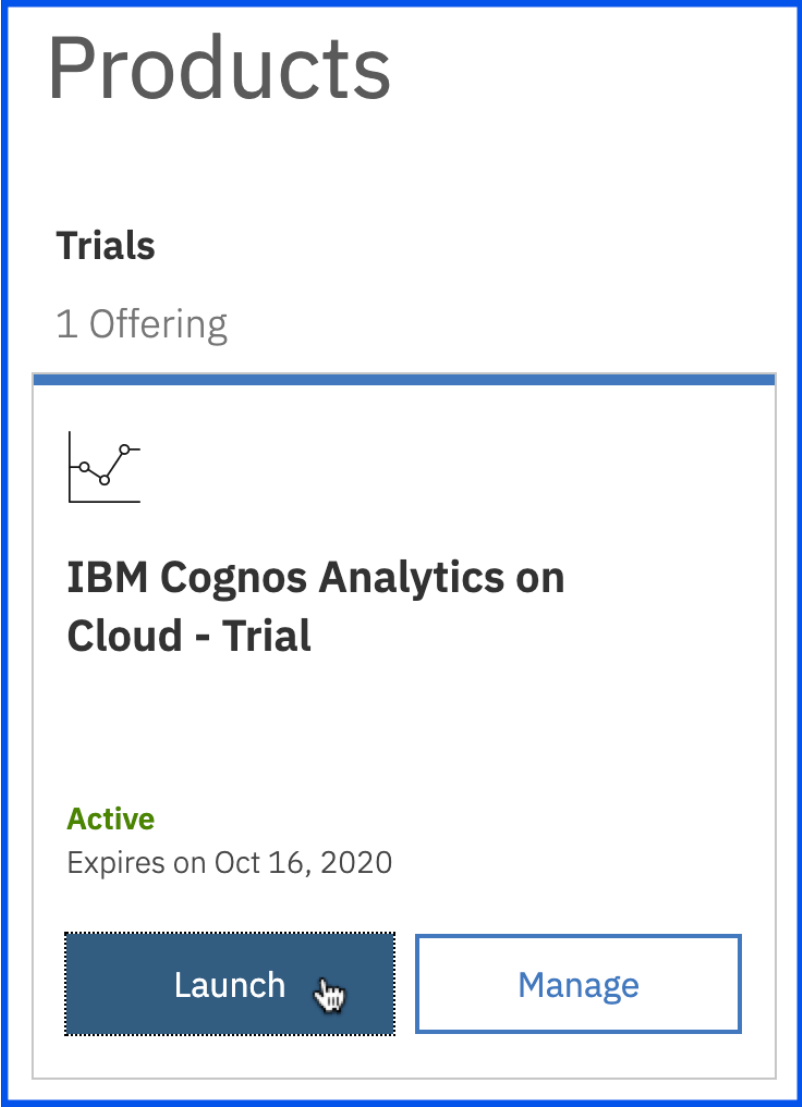
In this exercise, you will learn how to upload external data files to Cognos Analytics, and then learn how to start a new dashboard with templates. Lastly, you will learn how to create a simple dashboard.

Task A: Upload External Data Files

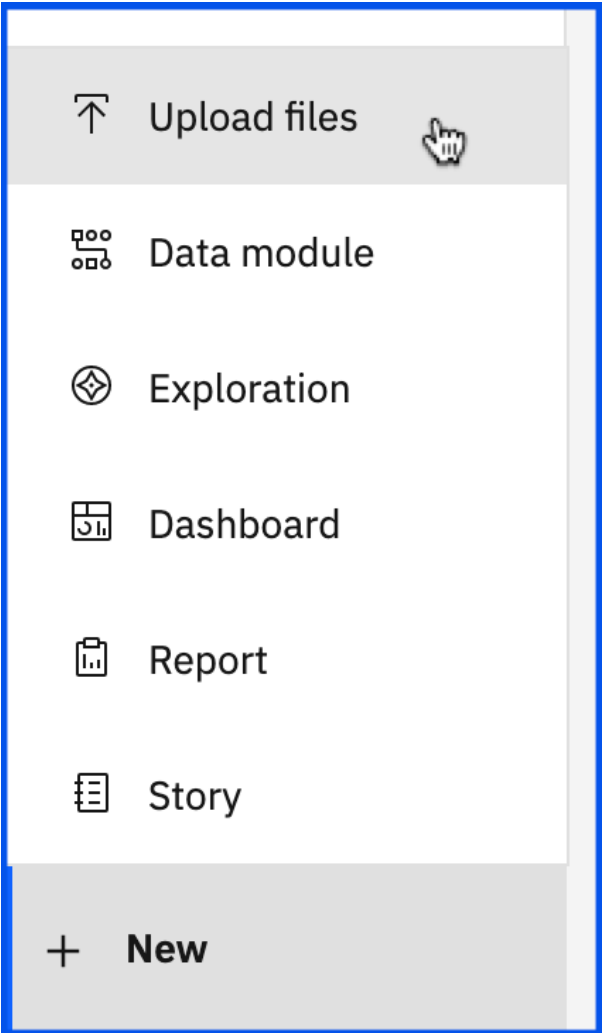
In this task, you will learn how to upload external data files to Cognos Analytics.

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**.



- 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.

Reading CustomerLoyaltyProgram.csv...

Cancel Details

Analyzing CustomerLoyaltyProgram.csv


Cancel Details

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

CustomerLoyaltyProgram.csv was uploaded successfully.

Hide Details

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

 Hello. Welcome to IBM Cognos Analytics.


Recent

Name	Type	Last modified
CustomerLoyaltyProgram.csv	CSV	

Task B: Start a New Dashboard with Templates

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

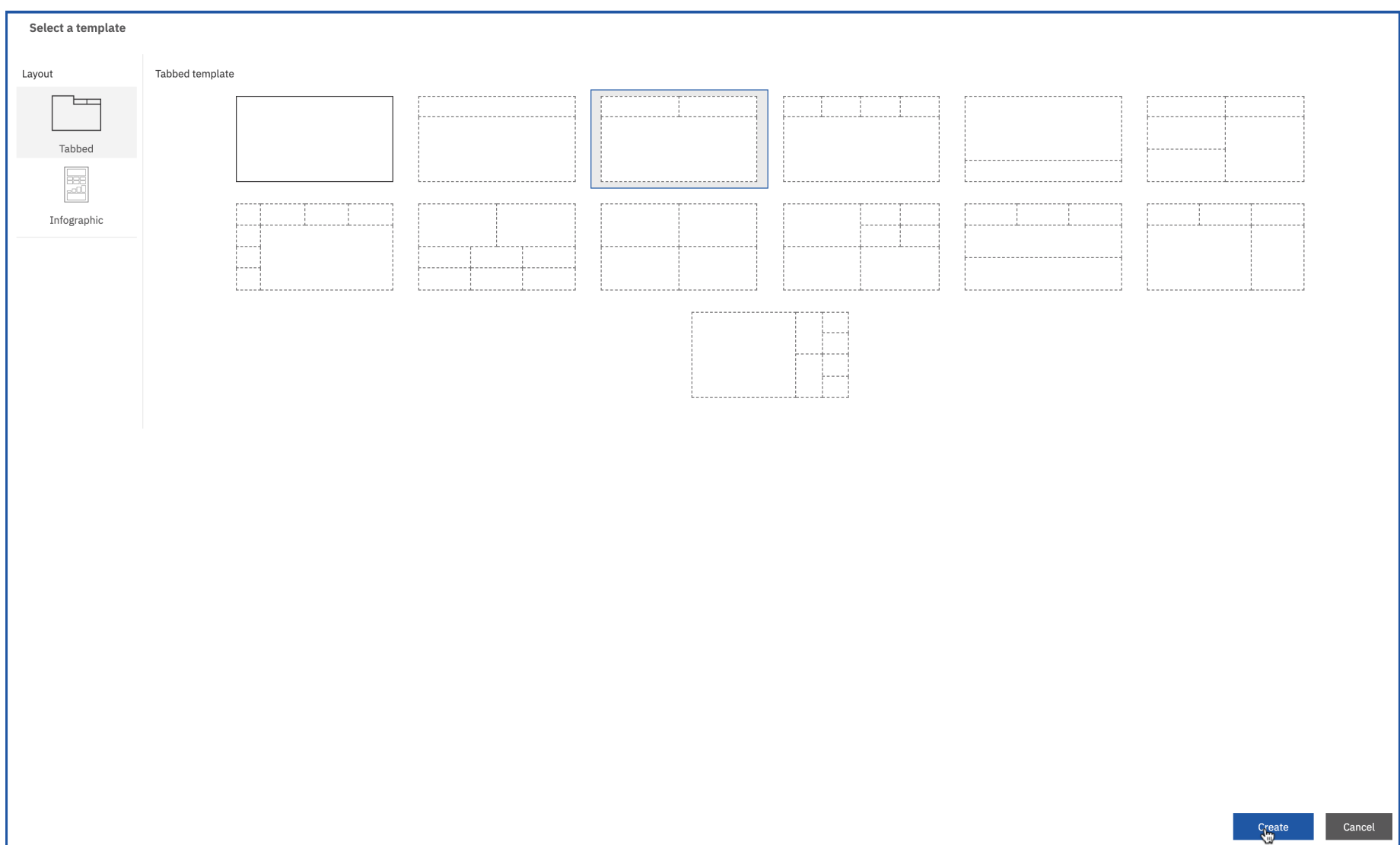
1. Click on the uploaded data file **CustomerLoyaltyProgram.csv**.

 Hello. Welcome to IBM Cognos Analytics.

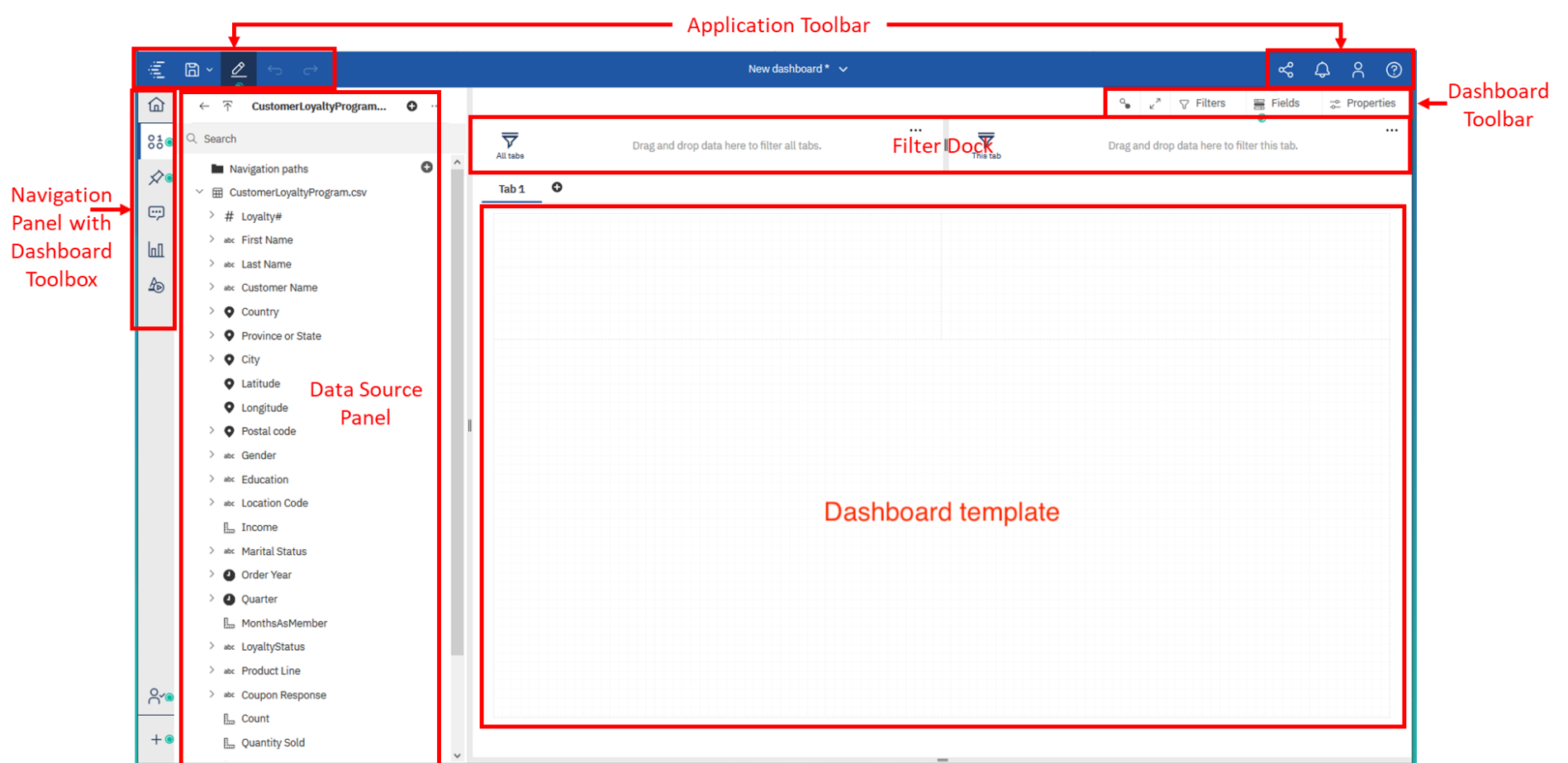
Recent

Name	Type	Last modified
CustomerLoyaltyProgram.csv	CSV	

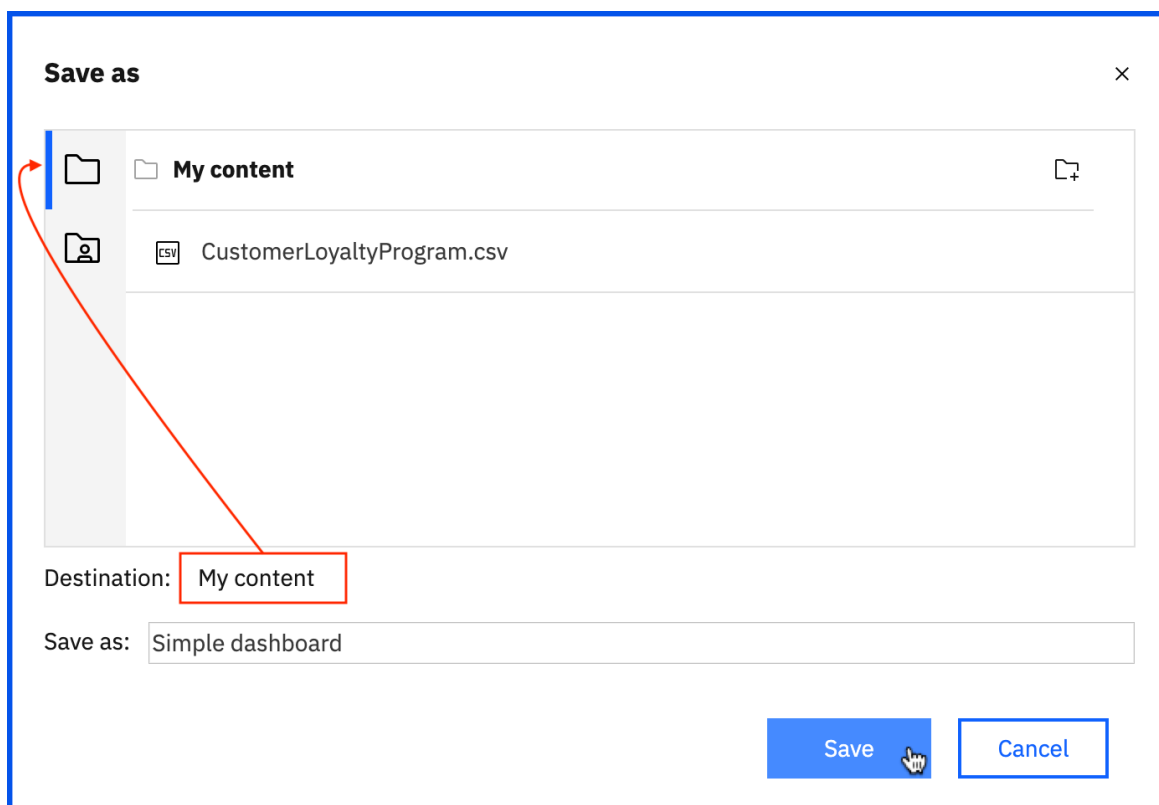
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.



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



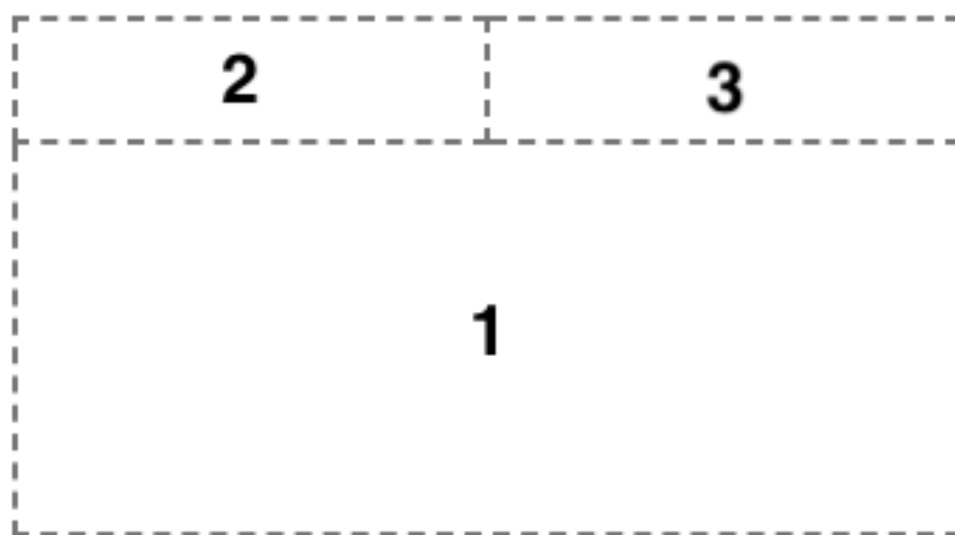
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write "Simple dashboard", and click **Save**.



Task C: Create a Simple Dashboard

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

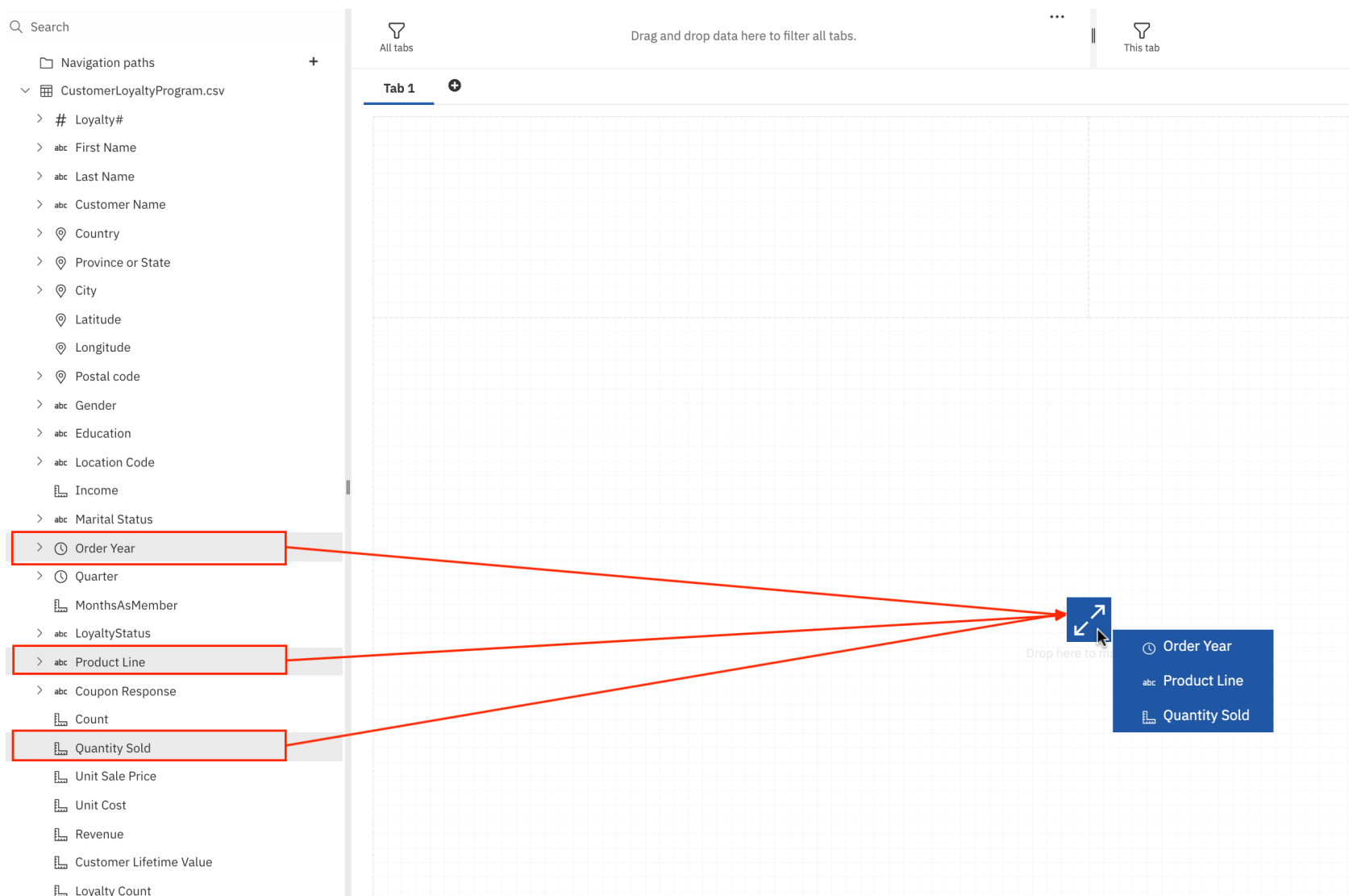
1. As you build the dashboard, the location placement for Widgets in the dashboard template will be referenced using the following Panel numbers.



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.

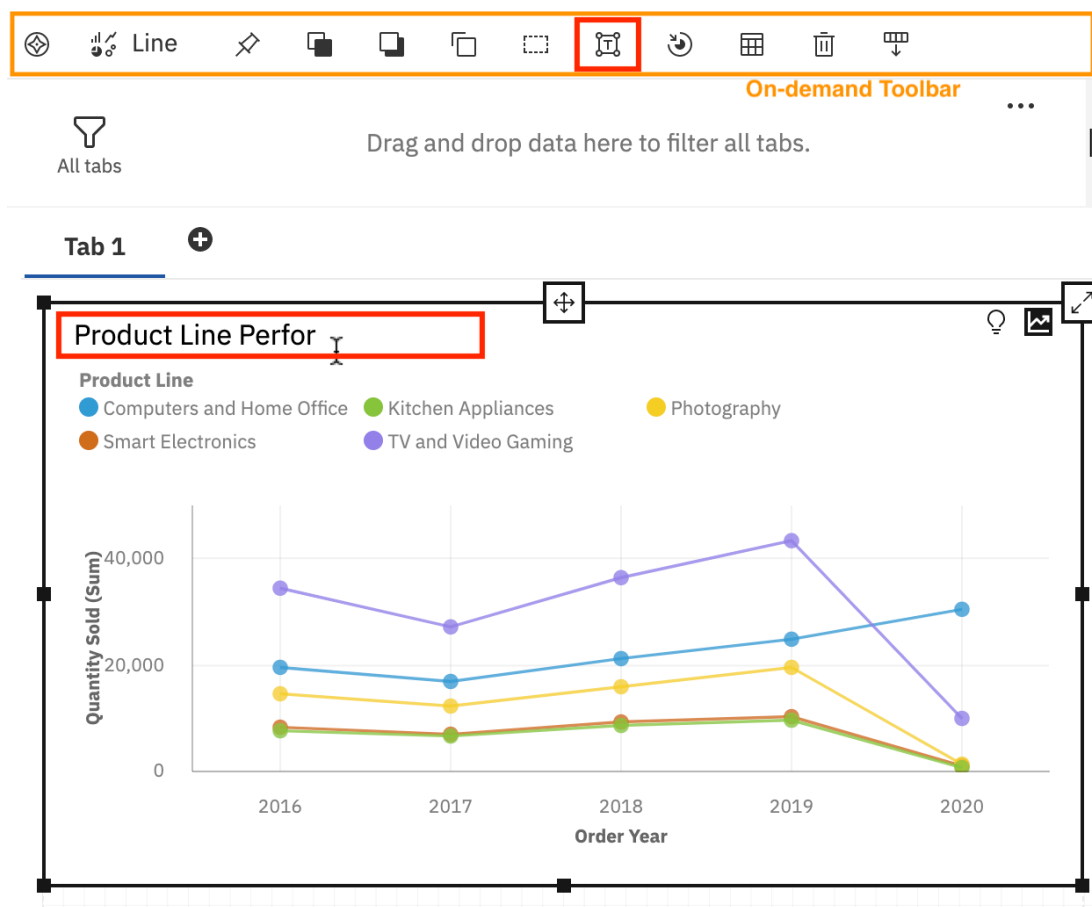


3. From the **Data Source** panel, press **CTRL** and select **Order Year, Quantity Sold, Product Line** and drag it to the center of **Panel 1**, releasing them once you see the **drop zone turn blue**.

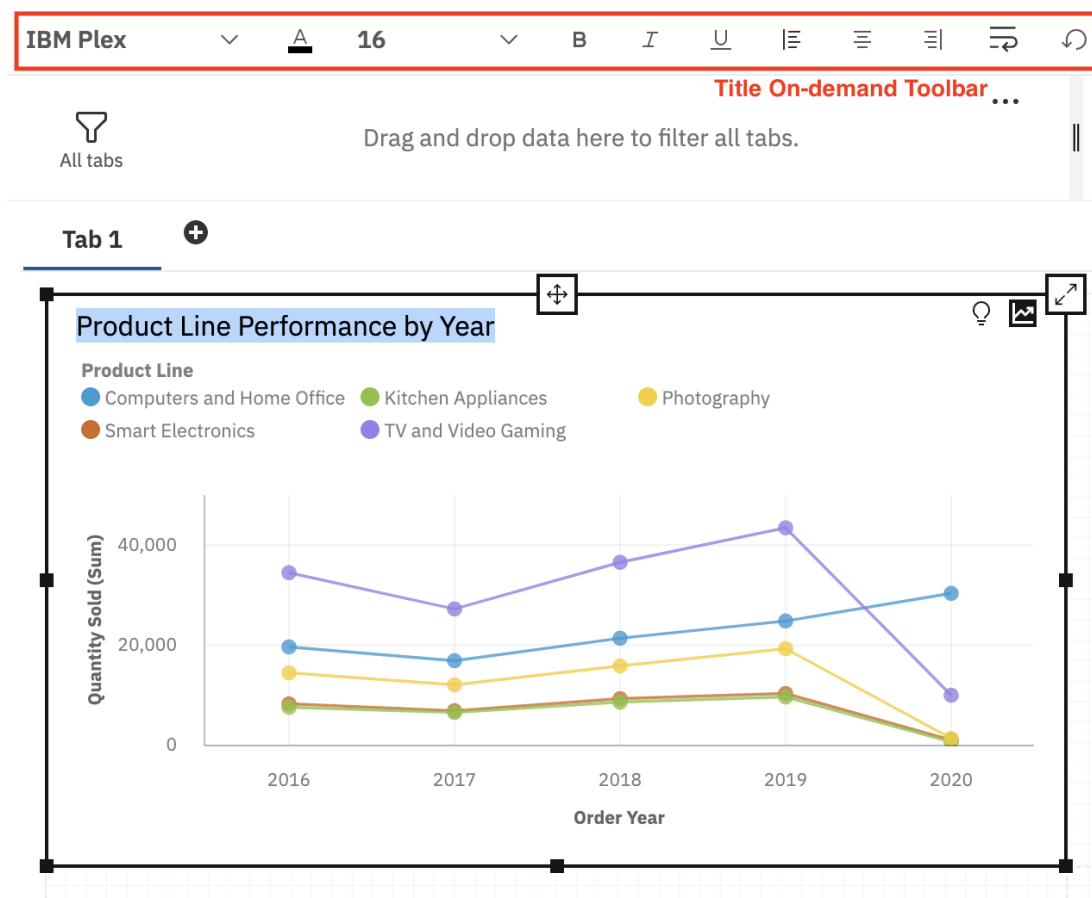


4. Click on the **Line chart in panel 1** to bring it into focus and render the **on-demand toolbar**.

5. From the on-demand toolbar, click **Edit the title**. Enter the title "Product Line Performance by Year" to the visualization.

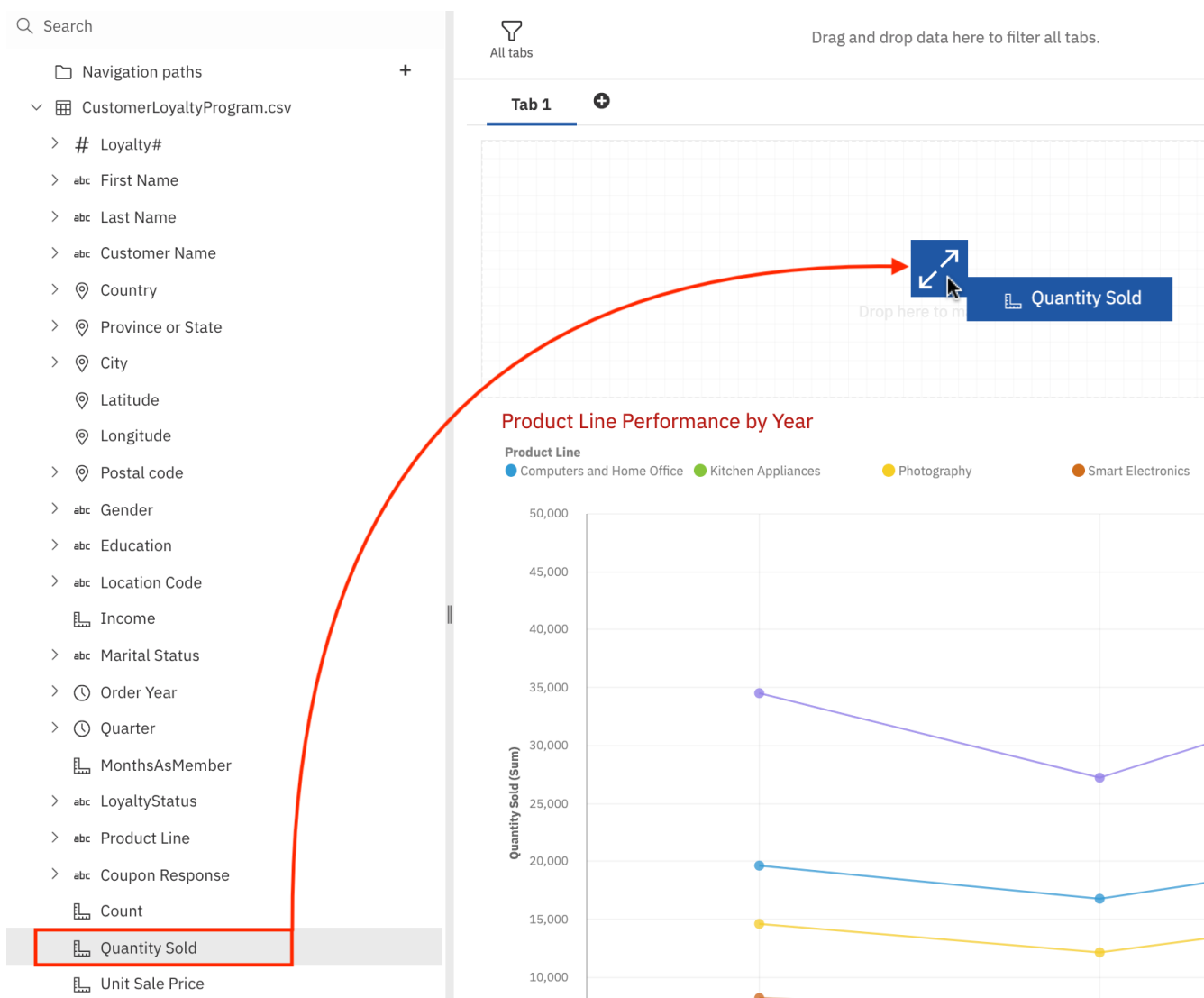


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.

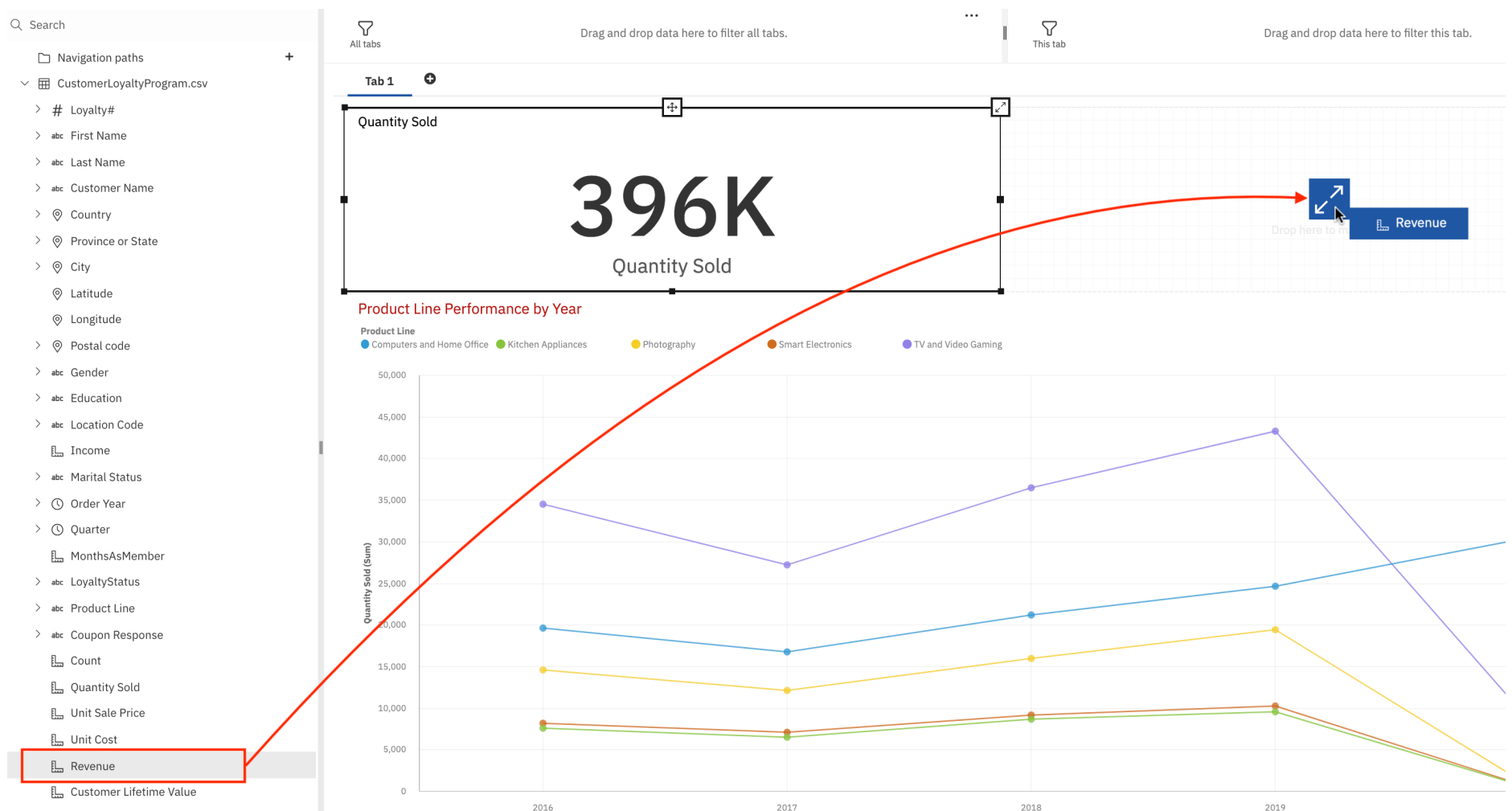


7. Click the **Color picker** icon, and change the color to **Red**, then click the font size drop-down and choose **18**.

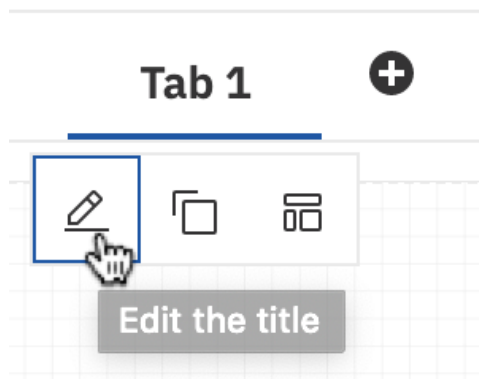
8. From the **Data Source** panel, select **Quantity Sold** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone turn blue**.



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:

Quantity Sold

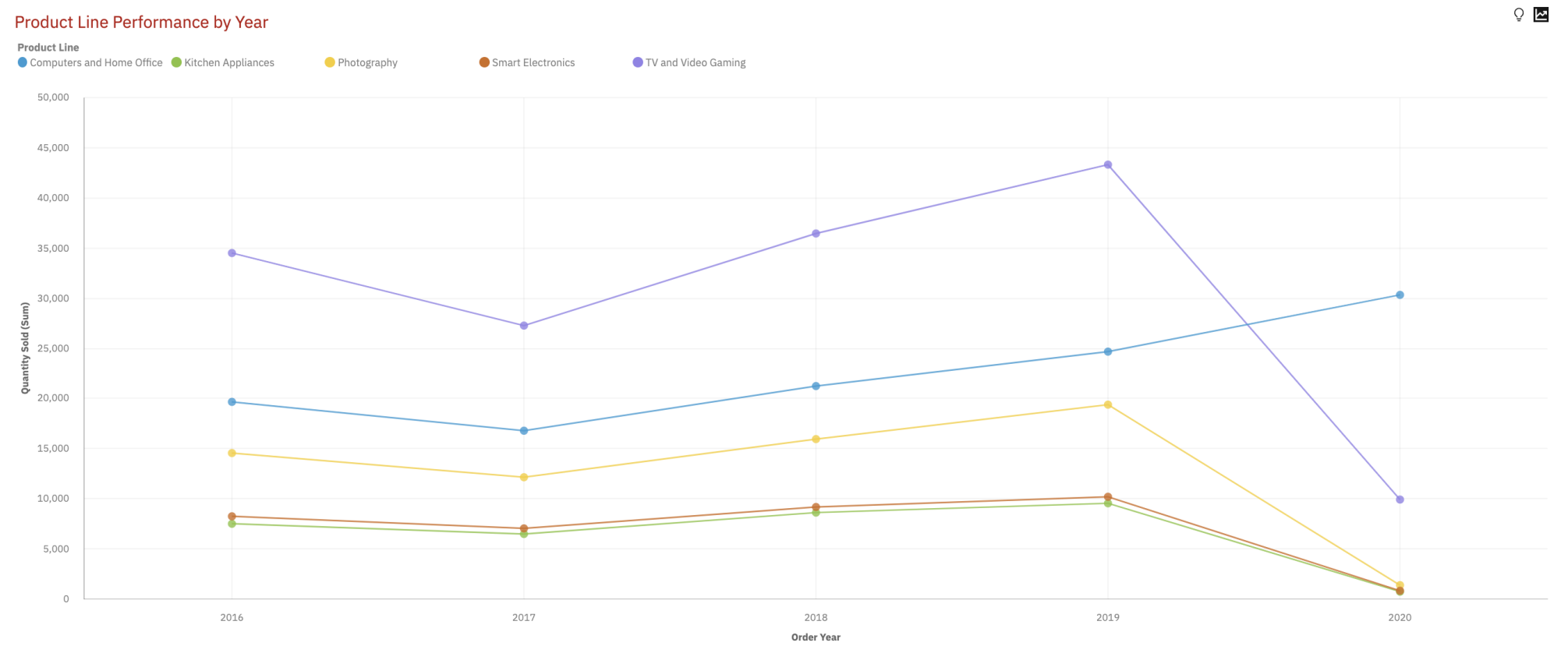
396K

Quantity Sold

Revenue

\$176,520,879

Revenue



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
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