



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.



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

Already have an IBM account? [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.

[REDACTED]@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](#)

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 myIBMidashboard interface. At the top, there are language selection buttons for "United States" (French) and "Accéder au site de mon pays/ma région". The main navigation bar includes "My IBM", "Profile", "Billing", "Search", and a user icon. A message bar at the top right says "Need help? Get product support". Below this, a section titled "Products" displays "Trials" with "1 Offering". The offering is for "Coursera on-line training - Data Visualizations", which is currently "Activation in progress". A "View support information" button is available. To the right, a promotional message encourages users to "Let IBM provide you technology and business solutions to fit your needs" and provides a "View catalog" button. The bottom of the page includes links for "Contact IBM", "Privacy", "Terms of use", "Accessibility", and "Cookie preferences", along with a language selector for "United States - English".

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

A zoomed-in view of the "Coursera on-line training - Data Visualizations" offering card. The card has a blue header bar with the title. Below it, the status is listed as "Active" and it expires on "Jan 24, 2021". At the bottom, there are two buttons: a dark blue "Launch" button with a white hand cursor icon, and a light blue "Manage" button.

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.

Welcome

IBM Cognos Analytics

Home Search My content Team content Recent

Hello. Welcome to IBM Cognos Analytics.

Unearth hidden insights with a personalized analytics experience driven by AI.

Knowledge Center

- IBM Cognos Analytics: A brief overview of some of the Analytics and how to get with some sample data.
- IBM Cognos Analytics: Analytics integrates reporting, dashboards, stories, and event management so that you can understand your organizations...
- Fast track your analytics journey with the IBM Accelerator Catalog! Analytics platforms like IBM Cloud Pak for Data and their composite products and services such as Cognos Analytics, Watson Studio, Planning Analytics and...
- IBM Cognos Analytics: overview with customer testimonials This video provides an overview of the key features of IBM Cognos Analytics: • An interface designed...
- How to create your first dashboard (11.1.0+) This video is intended for beginners, to help them get started with authoring dashboards. In this video...
- How to create your first report (11.1.0+) This video is intended for beginners, to help them get started with authoring reports. In this video...
- How to upload your own data (11.1.x) In this video learn how to upload a file, create a basic data module, and replace/append an...
- How to create an exploration (11.1.x) Welcome to our video about how to create an exploration. In this video we will show how to create a ...
- Getting started with your first story

Community What's new Launch the tour

Recent

Take a quick tour, How-to videos, Samples, Accelerator catalog

IBMid Manage + New

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 [?](#)

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.

- 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.

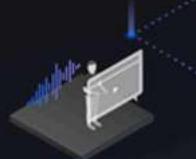
(i) Maintenance Thank you for your patience. At this time the email service is now restored. We apologize for any inconvenience this has caused.

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.

[Upload Dataset](#)

Prepare data

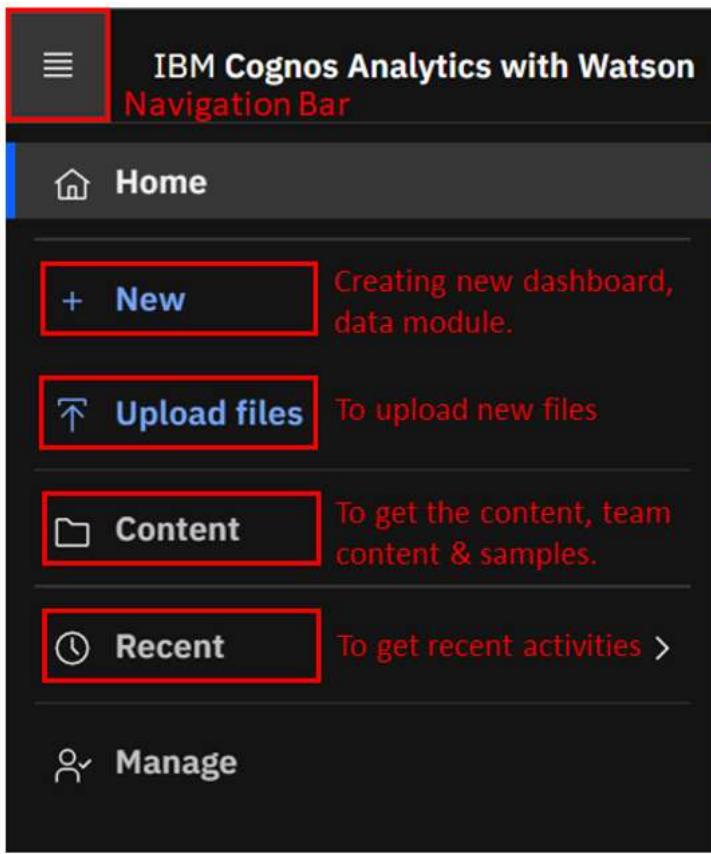
Use data modules to clean and connect data from multiple resources.



Exploration

Quickly find unbiased answers by identifying trends in your data with d...

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

The screenshot shows a product card for 'IBM Cognos Analytics on Cloud - Trial'. At the top is a small line chart icon. Below it, the product name is displayed in bold black text. A green 'Active' status indicator is shown, followed by the expiration date '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 and the title 'IBM Cognos Analytics'. Below it, a dark banner features a speech bubble icon and the text 'Get quick answers with the Assistant'. In the center, there's a search bar with the placeholder 'Ask a question' and a blue 'Get started' button. At the bottom, a light blue footer bar contains the text 'Introduction to Cognos Analytics', 'Leverage self-service analytics to make more confident decisions.', and another 'Get started' button. A red box highlights the 'To upload the dataset' section, which includes a large blue 'Upload' icon, the text 'Upload data and start creating content', and the instruction 'Upload spreadsheets, CSV files, and other types of files, and create content based on these files.' To the right, there's another section with a folder icon and the text 'Create content from existing data'.

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.*.

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.

<

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.

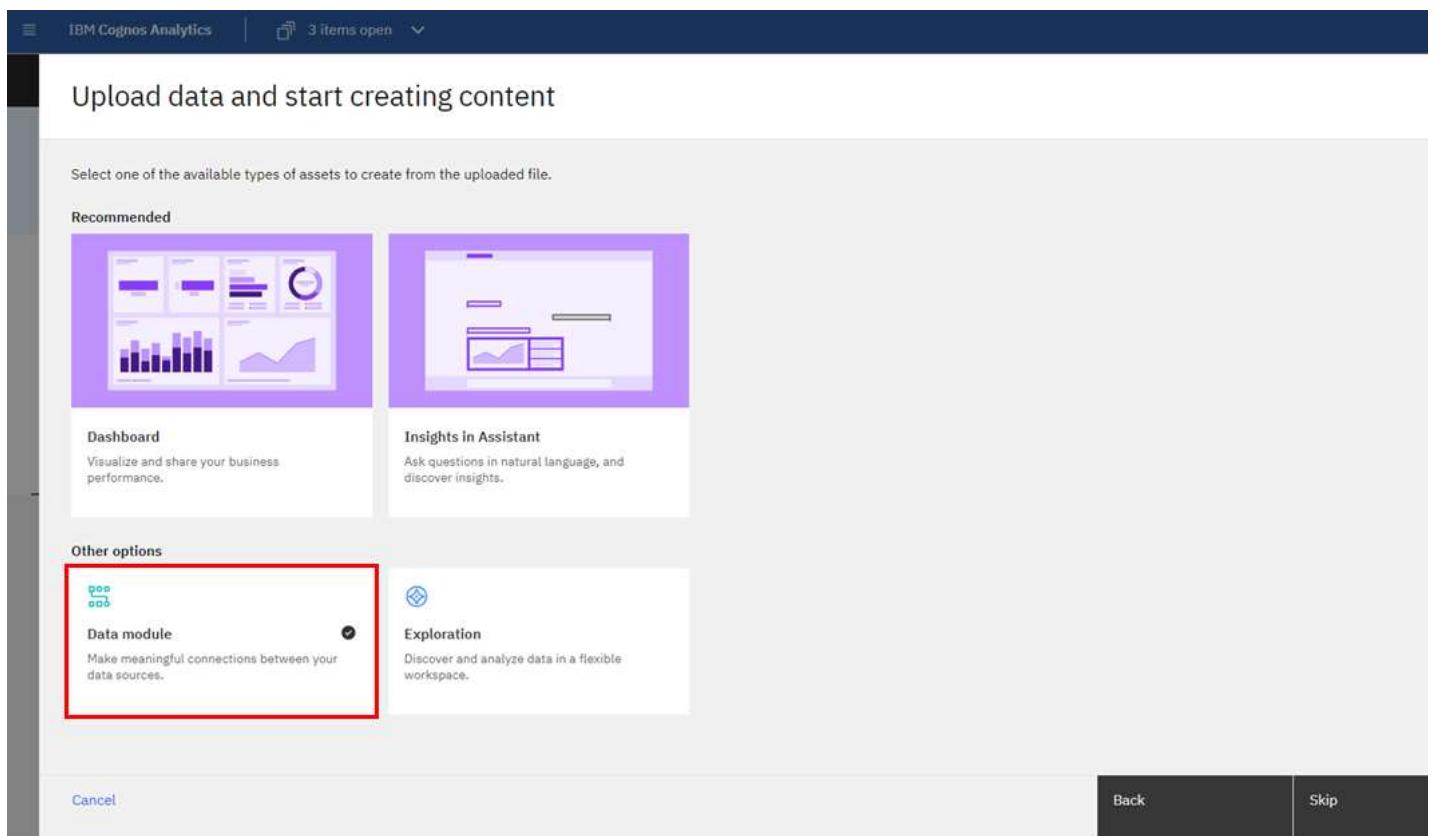
Add file

CustomerLoyaltyProgram (12).csv 

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



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



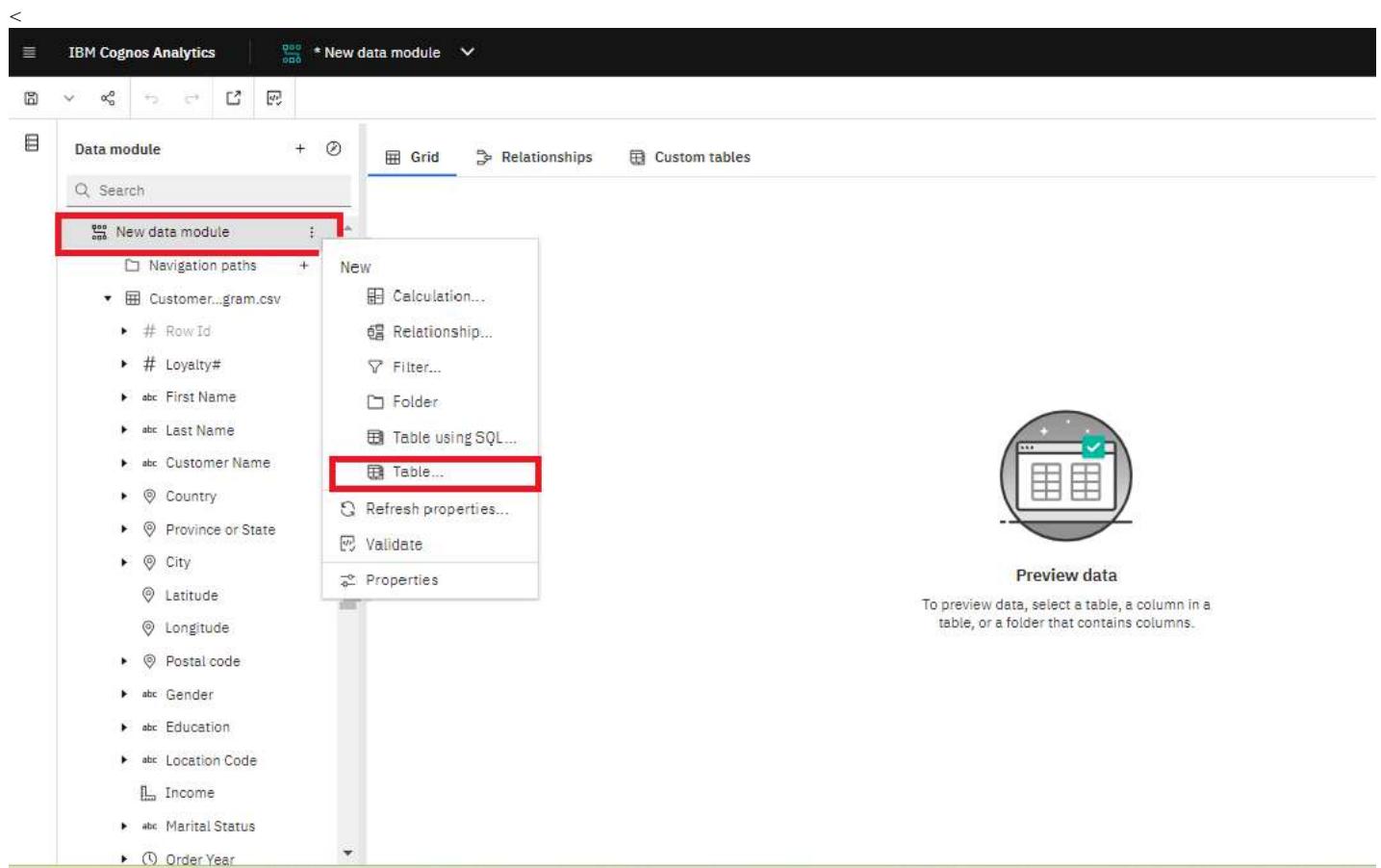
Task B: Edit Data Module and view the table on IBM cognos.

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 with a focus on editing a data module. At the top, there's a message about maintenance. Below that, there are sections for "Upload data and start creating content" and "Create content from existing data". In the center, a "Recent" section shows a "Customer Loyalty Program data module" that has been "1 item selected". To the right of this, a context menu is open, with "Edit data module" highlighted and a red box around it. Other options in the menu include "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 menu, there are "More +", "Create", and "Remove from recent" 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.



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

Alias of a table
Copy of a table
Joined view
Union of tables
Intersect of tables
Except of tables

Select tables

Select and add tables to create a new table from

Select tables

Cancel Next

The screenshot shows the 'Create table' wizard. In the 'Selected tables' section, a file named 'CustomerL...ogram.csv' is selected, indicated by a checked checkbox. Below this, several options for creating a table are listed: 'Alias of a table', 'Copy of a table', 'Joined view', 'Union of tables', 'Intersect of tables', and 'Except of tables'. On the left, there's a 'Select tables' section with a sub-instruction 'Select and add tables to create a new table from' and a 'Select tables' button, which is also highlighted with a blue box. At the bottom, there are 'Cancel' and 'Next' buttons.

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

Invert Clear all

Data will appear here

Refresh

(29) columns selected. Previous Cancel Finish

The screenshot shows the 'Create a view of a table' window. It displays a table structure with columns: Row Id, Loyalty#, First Name, Last Name, Customer Name, and Country. A file named 'CustomerL...ogram.csv' is selected, indicated by a checked checkbox. At the bottom, there are 'Invert' and 'Clear all' buttons. A placeholder area says 'Data will appear here' with a 'Refresh' button, which is highlighted with a blue box. At the very bottom, there are 'Previous', 'Cancel', and 'Finish' buttons.

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)

Select items

Find

CustomerLoyaltyProgram.csv ✓

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	Johson	Al Johson	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.

<

IBM Cognos Analytics * New data module

Save

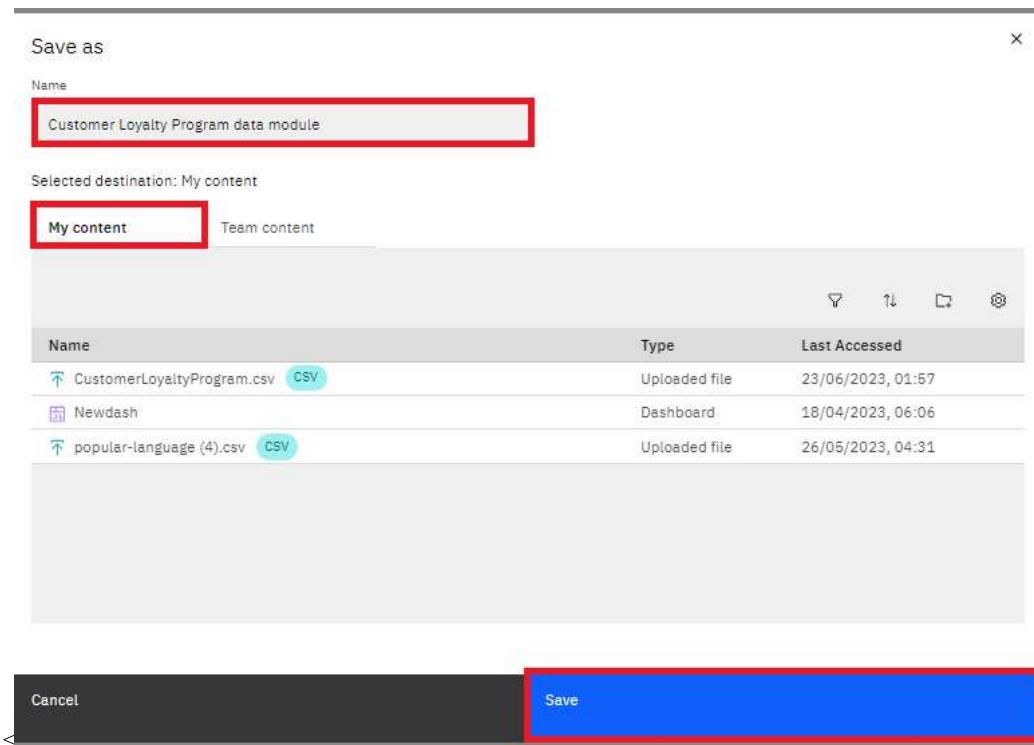
CustomerLoyaltyProgram.csv - View (1)

CustomerLoyaltyProgram.csv

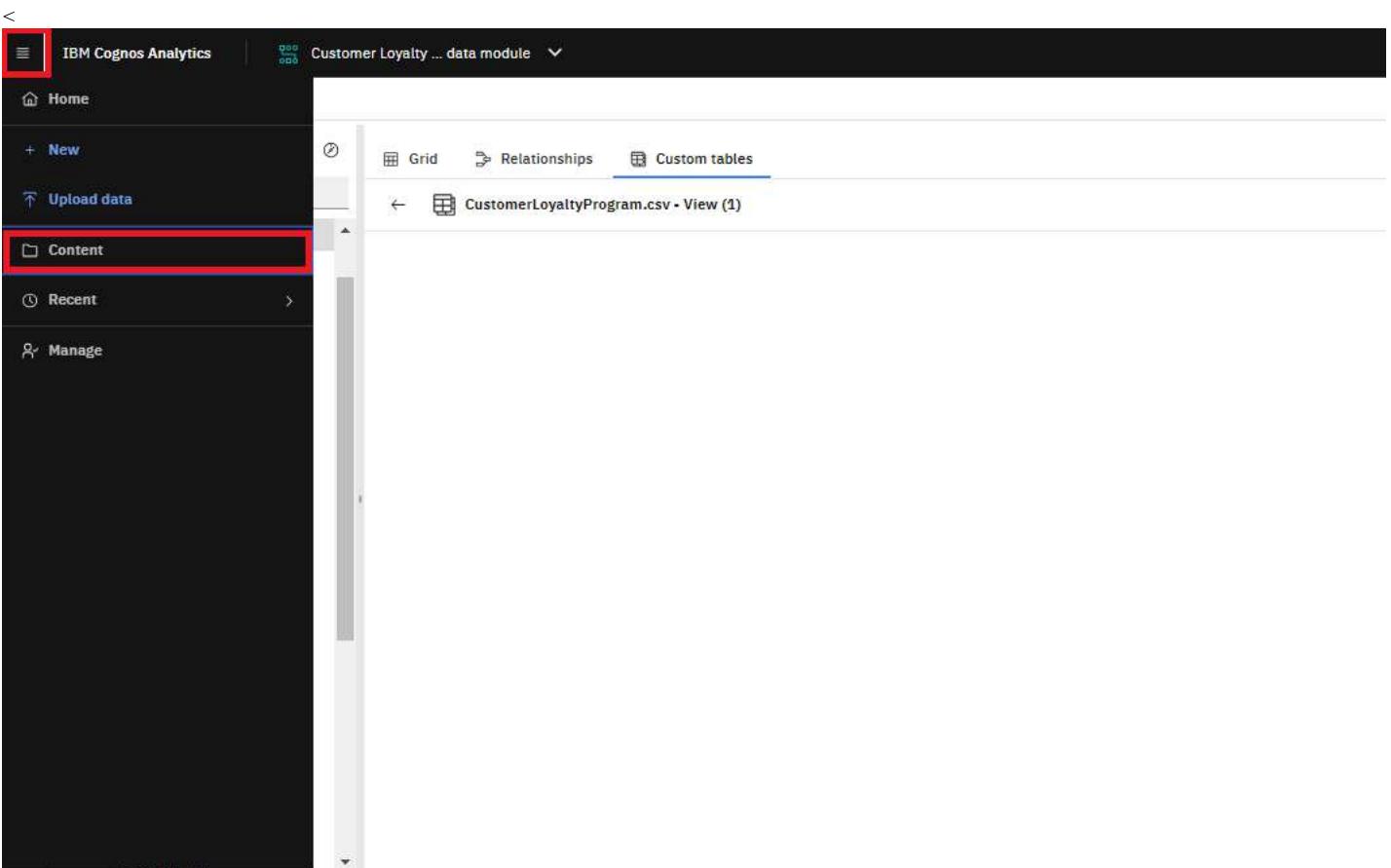
CustomerLoyaltyProgram.csv - View (1)

Grid Relationships Custom tables

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 are navigation links for 'My content' (highlighted with a red box), 'Team content', and 'Samples'. Below this, four items are listed in a grid:

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

The screenshot shows the 'Recent' tab in the dashboard interface. A single item is listed:

- CustomerLoyaltyProg...**: Last Modified: 6/7/2021, 1:56 AM. Includes a 'CSV' download icon.

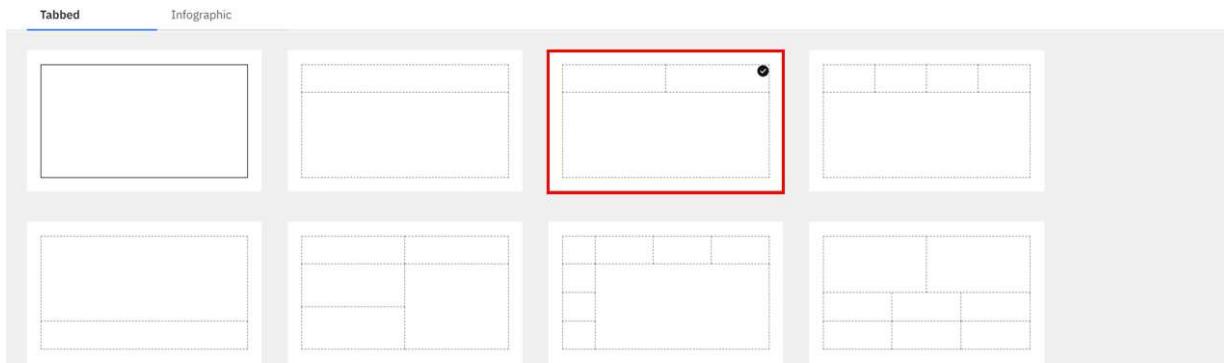
2. The Template window will display allowing you to select the type of dashboard and the template style. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **three-panel template**. Click **Create**.

Create a dashboard

Select a template for your dashboard

Cancel

Create



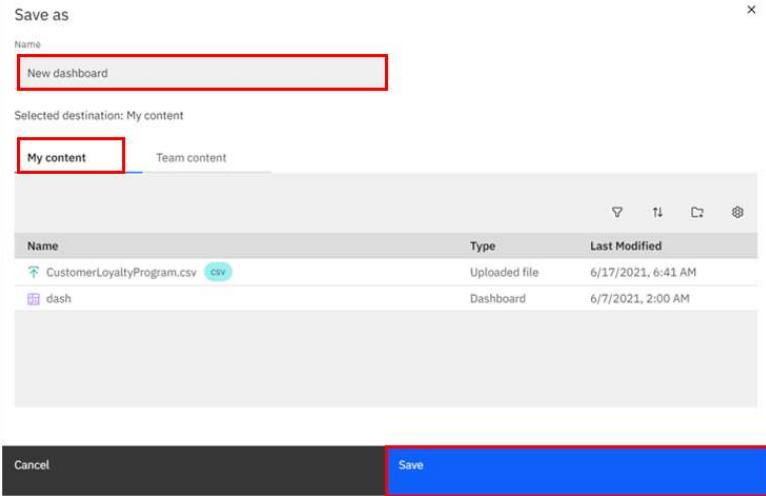
- Now you have created a new dashboard using the dashboard template.
- update

The screenshot shows the dashboard creation interface. On the left, a vertical panel labeled 'Navigation Panel with Dashboard Toolbox' contains icons for file operations like New, Open, Save, and Print. The main workspace is divided into several sections:

- Application Toolbar:** Located at the top, featuring standard application icons.
- Filter Dock:** A dock for filtering data, with tabs for 'All tabs' and 'This tab'. It includes a placeholder 'Drag and drop data here to filter all tabs.' and a 'Filter' button.
- Data Source Panel:** A panel on the left containing a tree view of data sources. It shows a single source named 'CustomerLoyaltyProgram.csv' expanded, revealing fields such as Loyalty#, First Name, Last Name, Customer Name, Country, Province or State, City, Latitude, Longitude, Postal code, Gender, Education, Location Code, and Income.
- Dashboard Template:** The main workspace area where a new dashboard tab is currently empty.

A red arrow points from the 'Edit' icon in the Application Toolbar down towards the Data Source Panel.

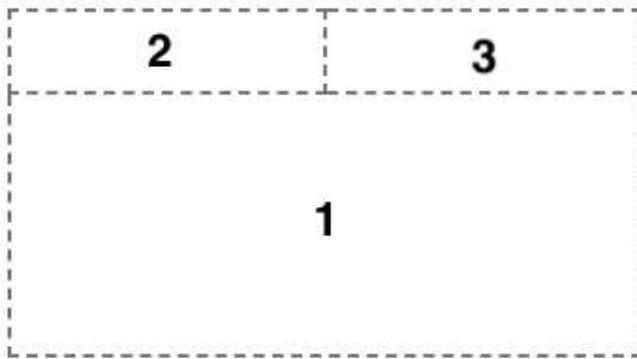
- To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write “Simple dashboard”, and click **Save**.



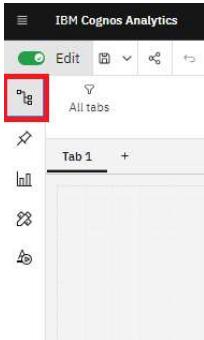
Task D: Create a Simple Dashboard

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 `CustomerLoyaltyProgram.csv` as the Selected Source.

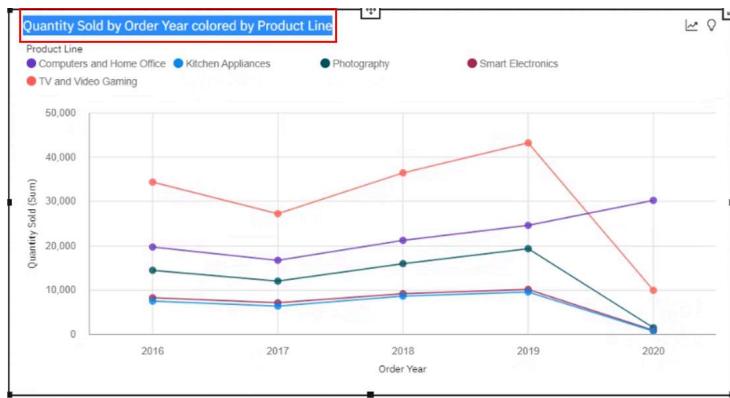


- From the **Data Source** panel, press **CTRL** and select **Order Year, Quantity Sold, Product Line** and drag it to the center of **Panel 1**, releasing them once you see the drop zone turn blue.

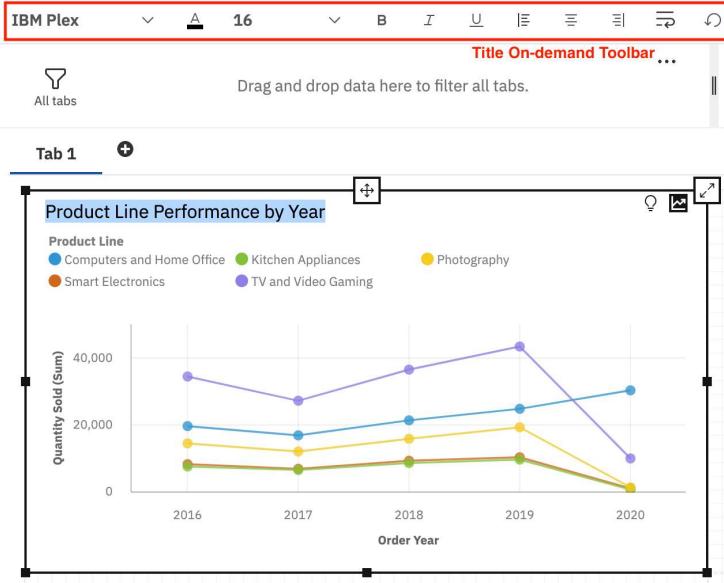
The screenshot shows the Tableau desktop environment. On the left, the Data pane displays a hierarchical list of fields from a source named 'CustomerLoyaltyProgram.csv'. Fields include 'Order Year', 'Quarter', 'Product Line', 'Coupon Response', 'Count', and 'Quantity Sold'. Some fields have red boxes around them, specifically 'Order Year', 'Product Line', and 'Quantity Sold'. On the right, there is a blank canvas area with a tooltip that says 'Drop here to make a visualization'. At the top of the interface, there are tabs for 'Tab 1' and 'All tabs', along with search and filter options.

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**.

Q Search

All tabs

Drag and drop data here to filter all tabs.

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

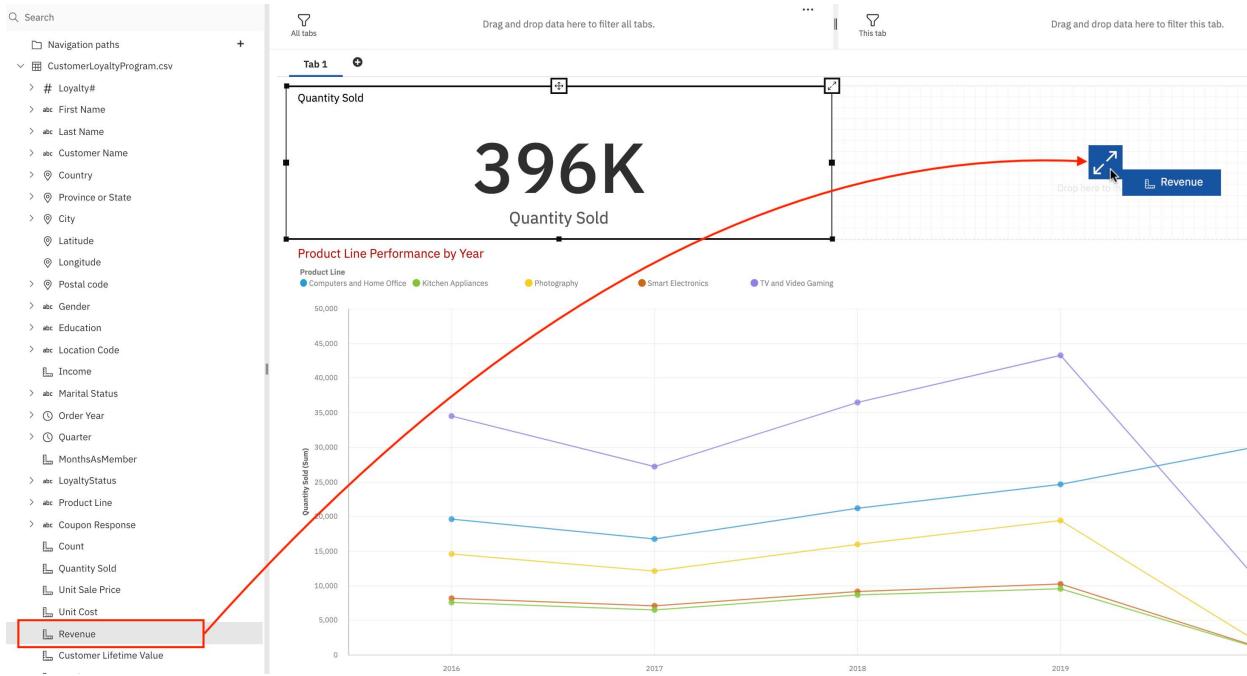
Tab 1

Product Line Performance by Year

Product Line

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

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". 12. To save the current work of the dashboard, press **CTRL+S**.

Finally, your dashboard "A - Product Sales" should look like below:

396K

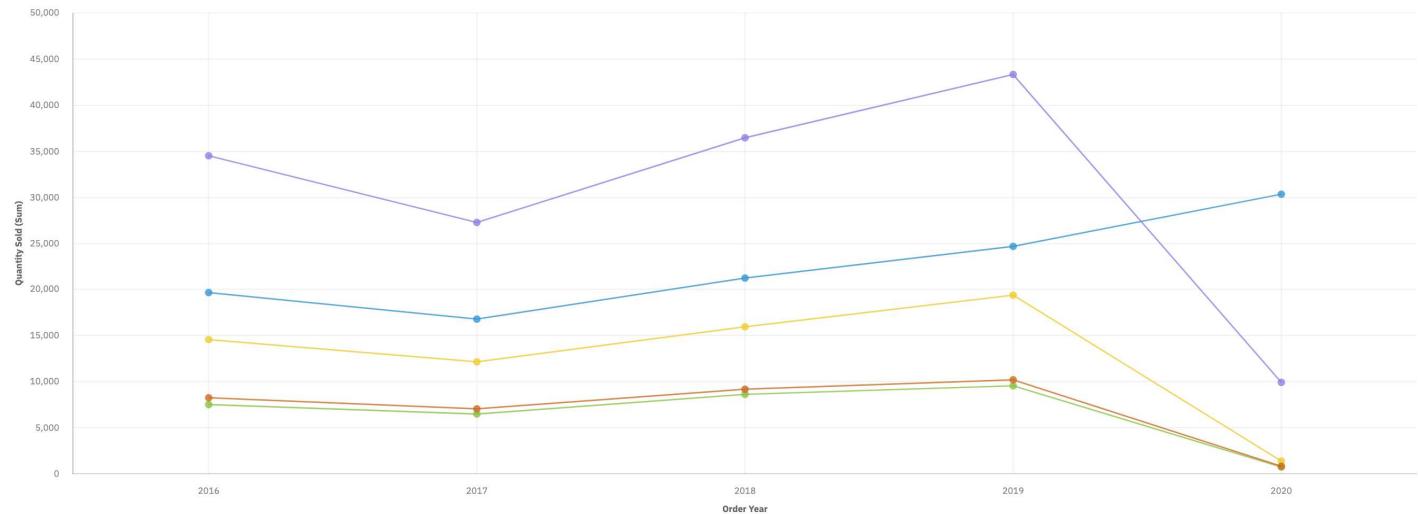
Quantity Sold

\$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)

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Other Contributor(s)

[Steve Ryan](#)

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