



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.

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 lowercase character
- One uppercase 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

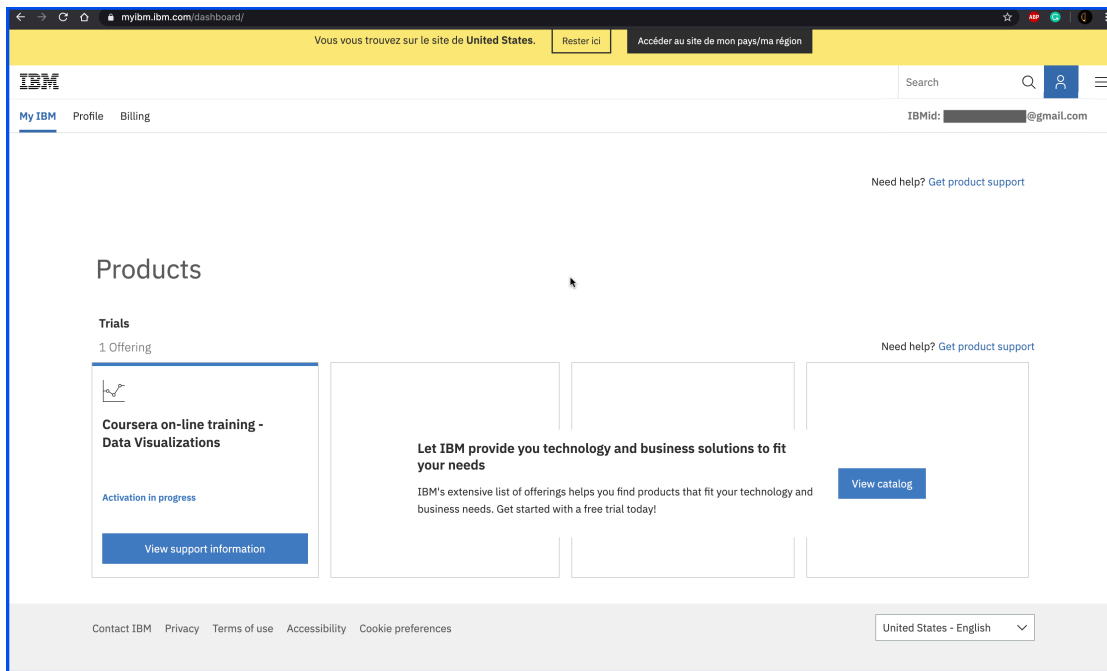
▼

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

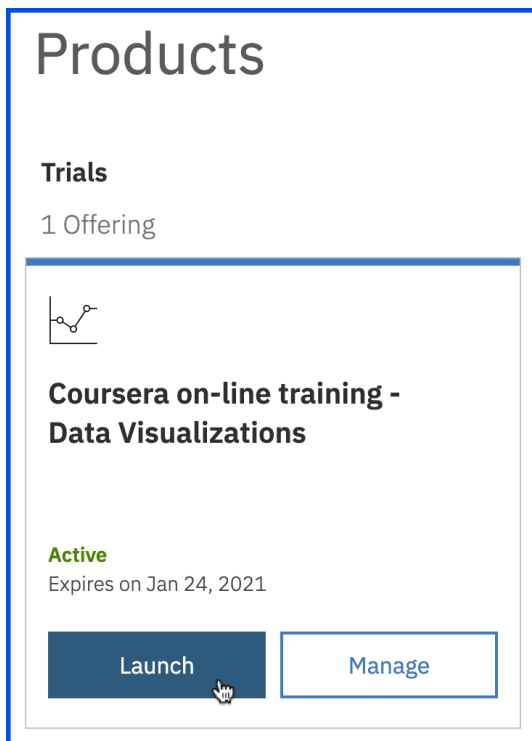
Cancel

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.



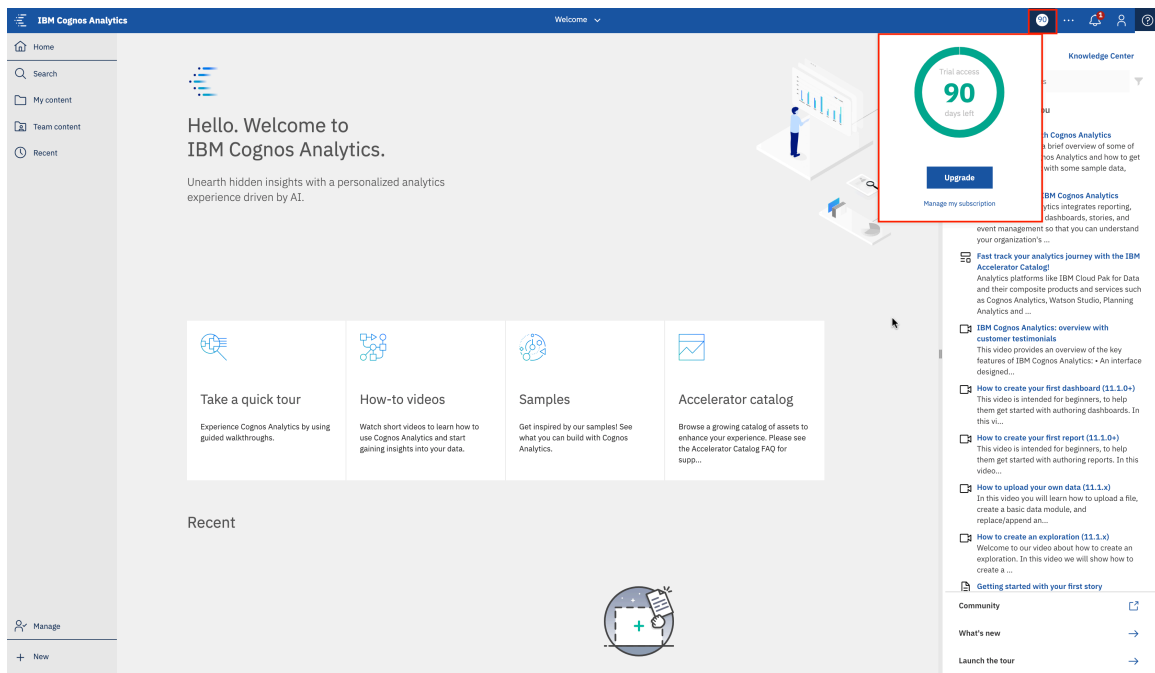
7. Click on the **Launch** button of this offering.



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.



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.

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.

 IBM Cognos Analytics with Watson **Application Toolbar** Trial Countdown 79

 **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

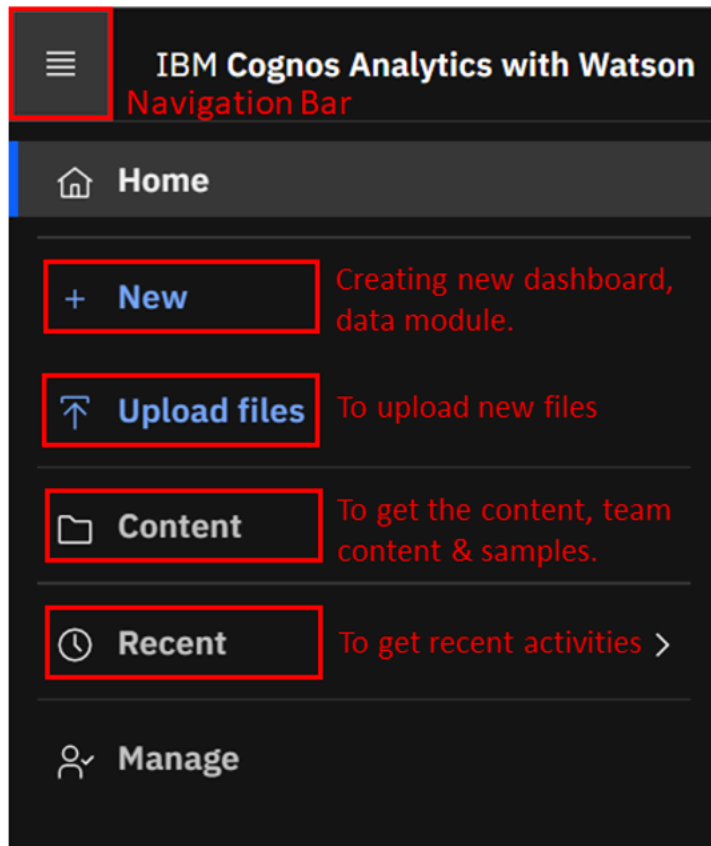
Use data modules to clean and connect data from multiple resources.



Exploration

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

- 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.

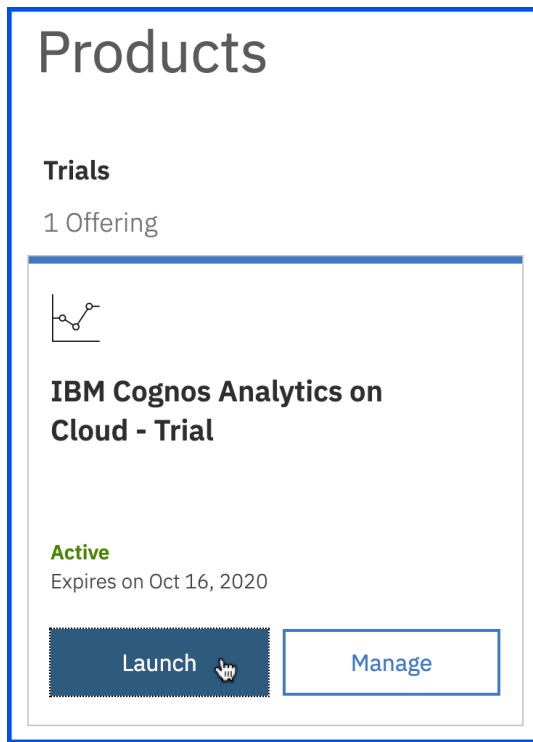
Exercise 3: Create a Simple Dashboard with Cognos Analytics

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.

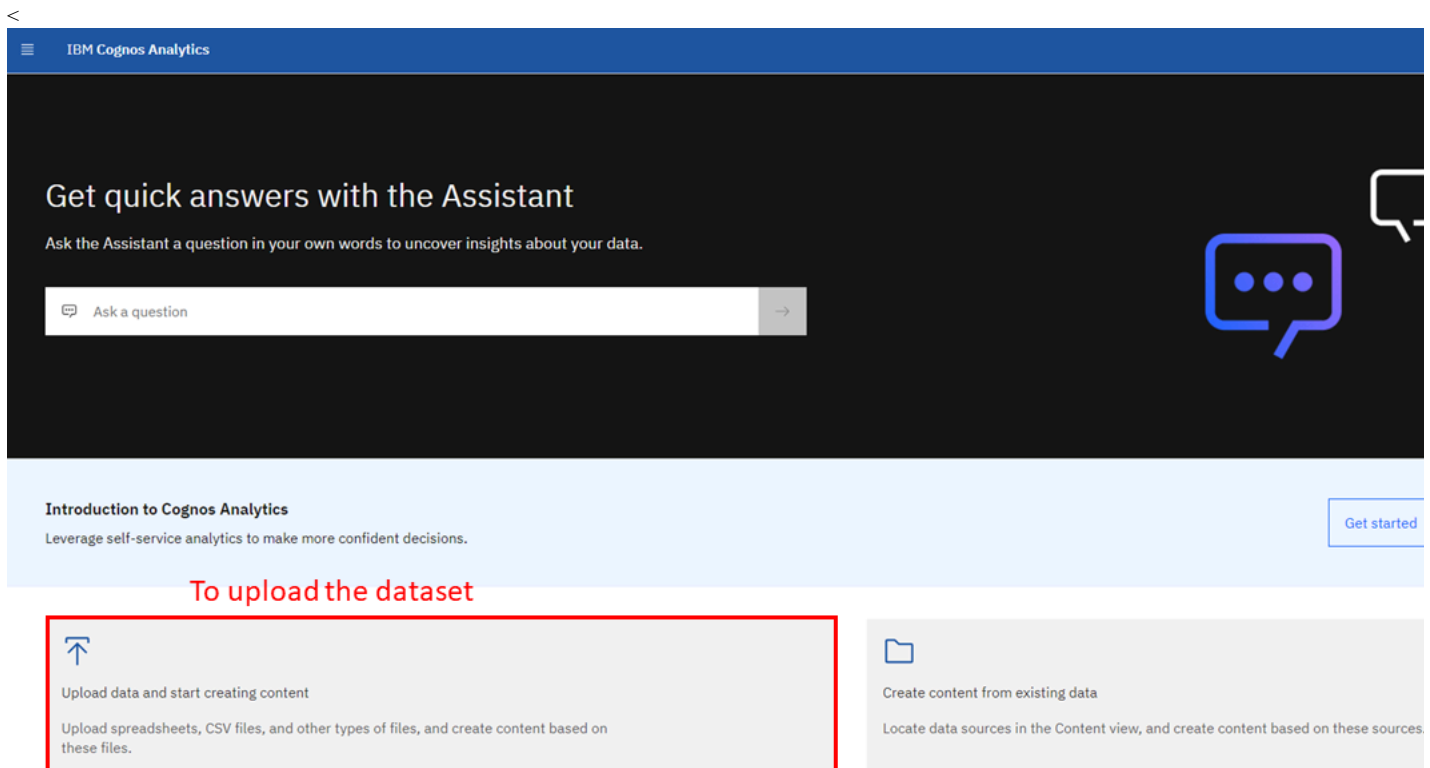
Task A: Upload External Data Files

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

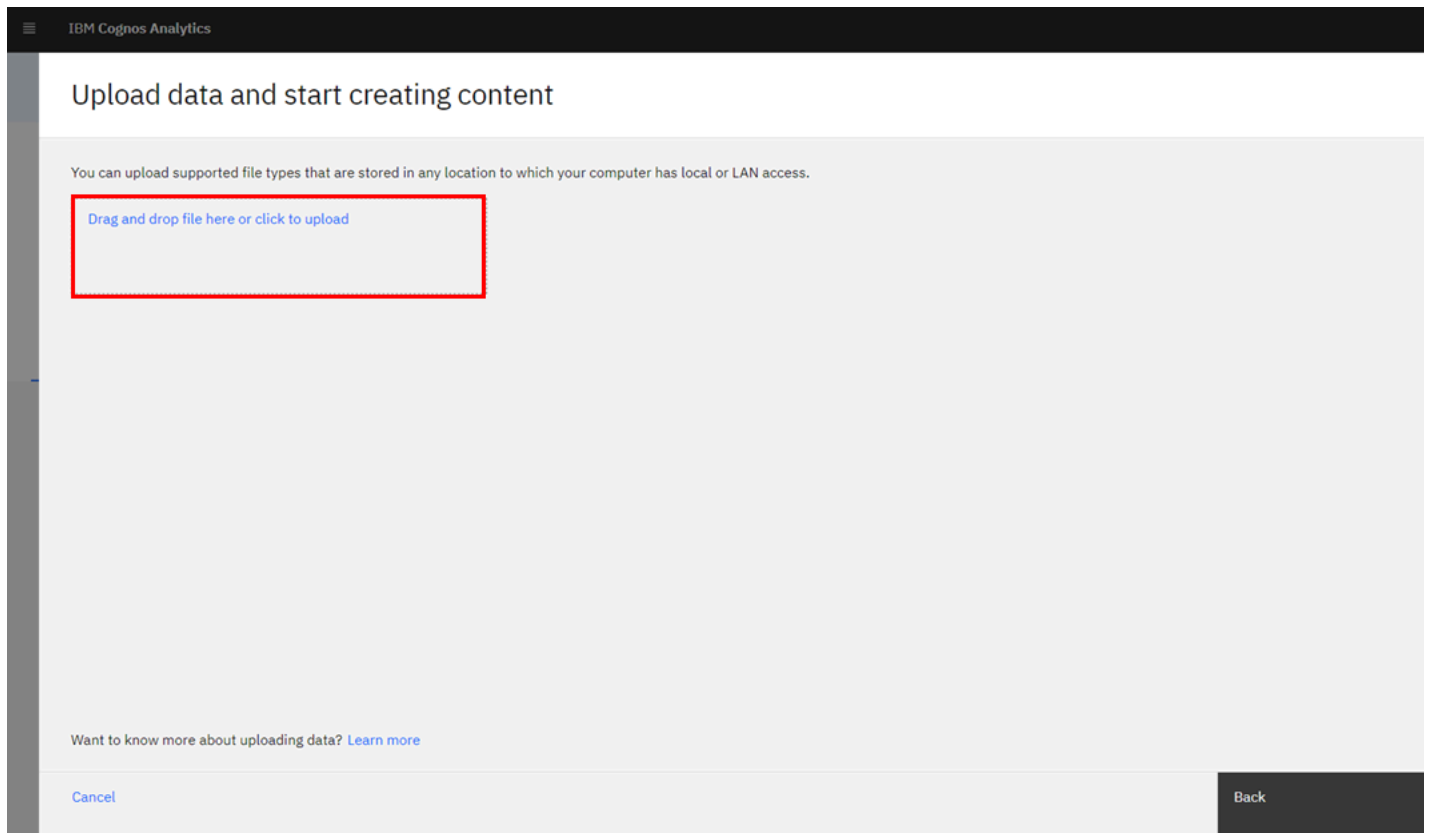
1. Download the file [CustomerLoyaltyProgram.csv](#).
2. To sign in to the Cognos Analytics platform with your IBMid, go to myibm.ibm.com/dashboard/.
3. Enter your IBMid and password.
4. Scroll down and click **Launch**.



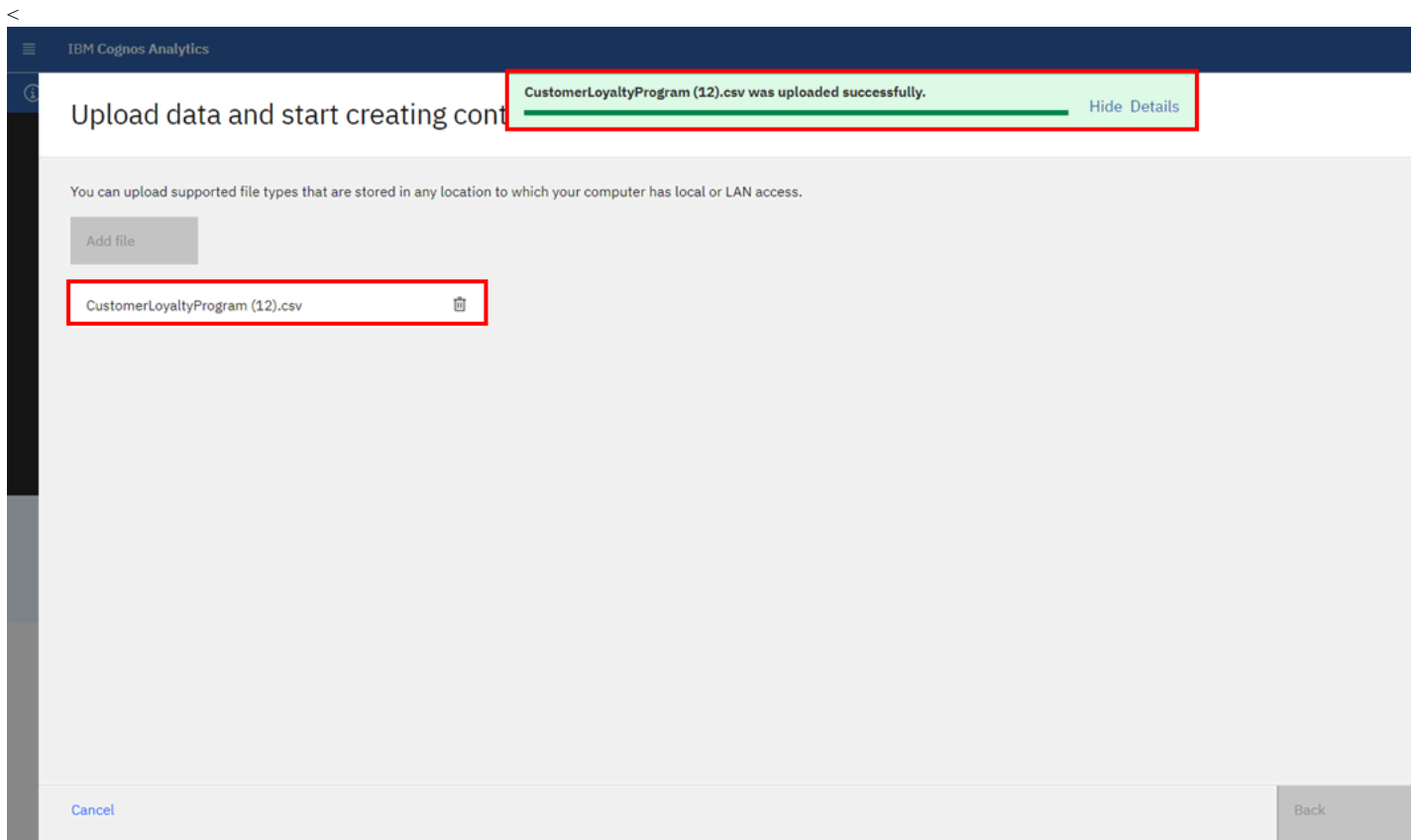
5. To upload a file, you may either drag and drop this file into the File Drop Zone (highlighted in the image above), or you may click **Upload files** at the bottom left corner to navigate to where the file is saved. For this lab, we will use the second option. Click **New > Upload files**.



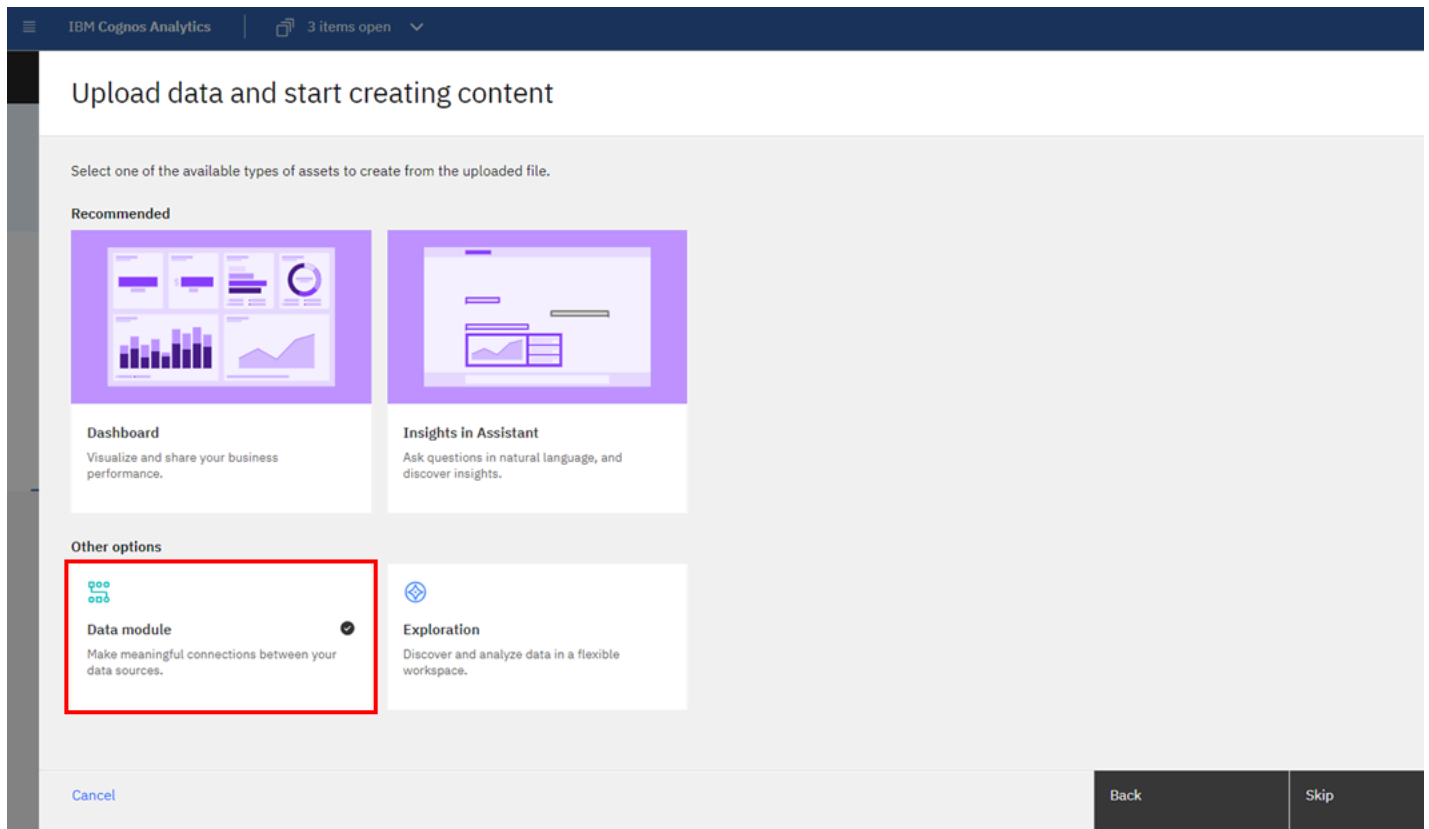
6. Click on Drag and drop file here or click to upload, a updated new file browser window will open. Navigate to where the file is saved, select the file, and click Open.*.



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.



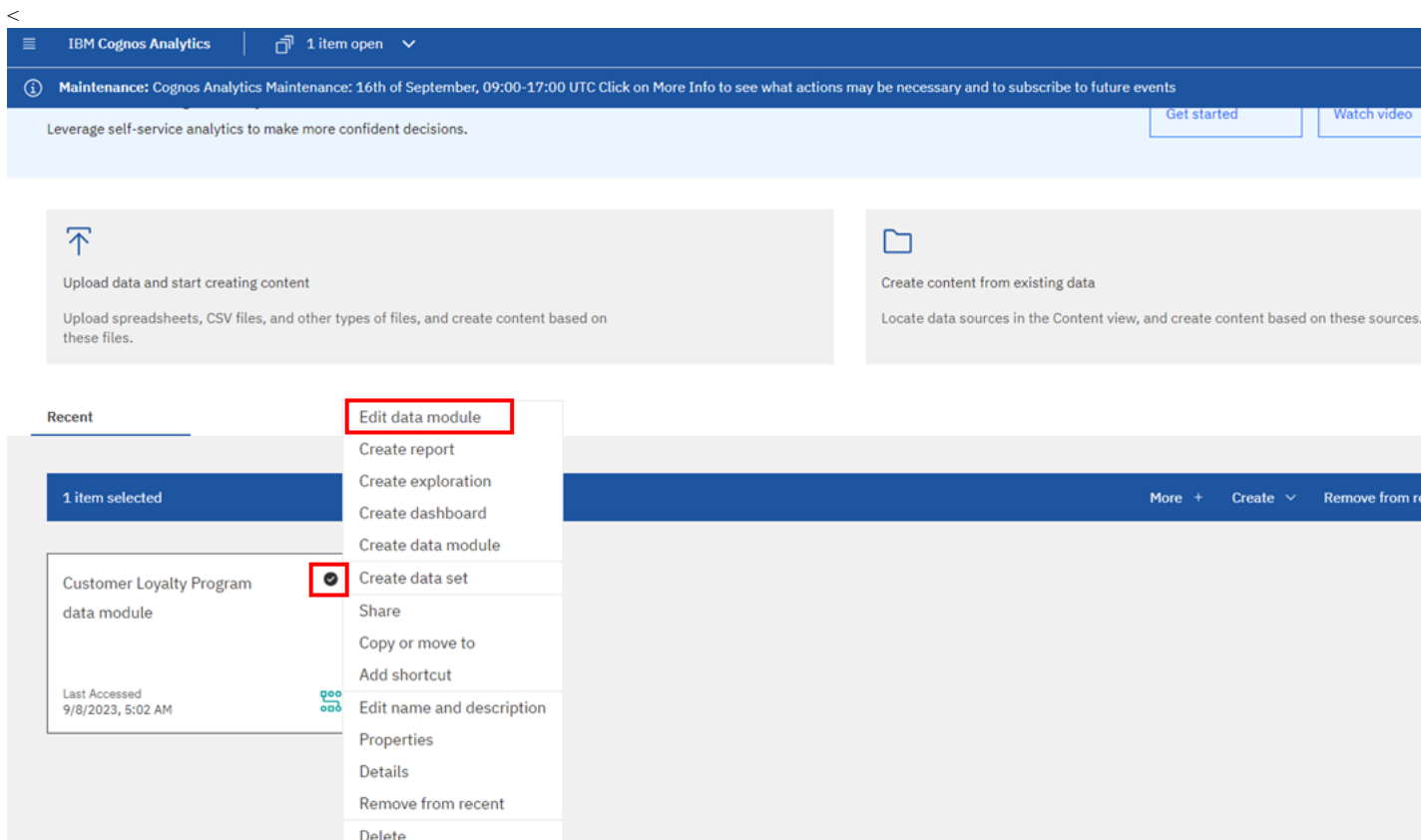
8. Convert the **CustomerLoyaltyProgram.csv** to **Data module** by selecting the **Data module** in **Other options** and click **Create**.



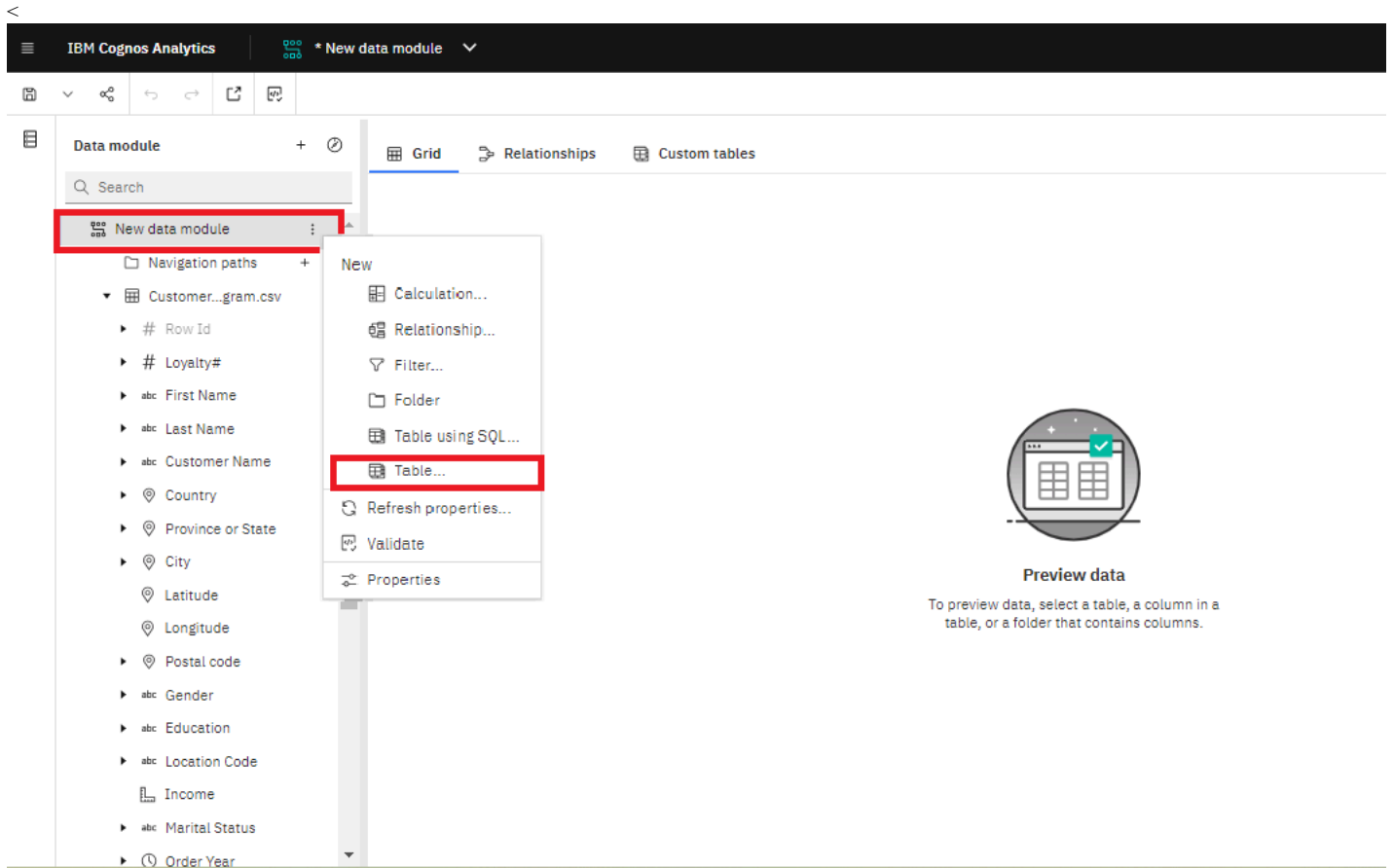
Task B: Edit Data Module and view the table on IBM cognos.

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**.



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.

Selected tables

Find

Find

CustomerL...gram.csv

Select tables

Select and add tables to create a new table from

Select tables

View of tables

To create a view of a table, select one or more package tables, or select one or more non-package tables.

Shortcut to a table

To 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

Find

CustomerL...ogram.csv

Row Id

Loyalty#

First Name

Last Name

Customer Name

Country

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.

\wedge

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
Find		1	837810	Abigail	Goris	Abigail Goris	Canada
CustomerL...ogram.csv		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	Carvalho	Akilah Carvalho	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.

 \angle

The screenshot shows the IBM Cognos Analytics interface. On the left, the 'Data module' pane is open, displaying a list of data sources. The 'CustomerLoyaltyProgram.csv' file is selected and highlighted with a red box. Below it, a list of fields is visible, including 'Row Id', 'Loyalty#', 'First Name', 'Last Name', 'Customer Name', 'Country', 'Province or State', 'City', 'Latitude', 'Longitude', 'Postal code', 'Gender', 'Education', 'Location Code', 'Income', 'Marital Status', 'Order Year', and 'Quarter'. On the right, the 'Custom tables' pane is open, showing a diagram with two tables: 'CustomerLoyaltyProgram.csv' and 'CustomerLoyaltyProgram - View (1)'. The 'CustomerLoyaltyProgram - View (1)' table is highlighted with 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.

Save as

Name

Customer Loyalty Program data module

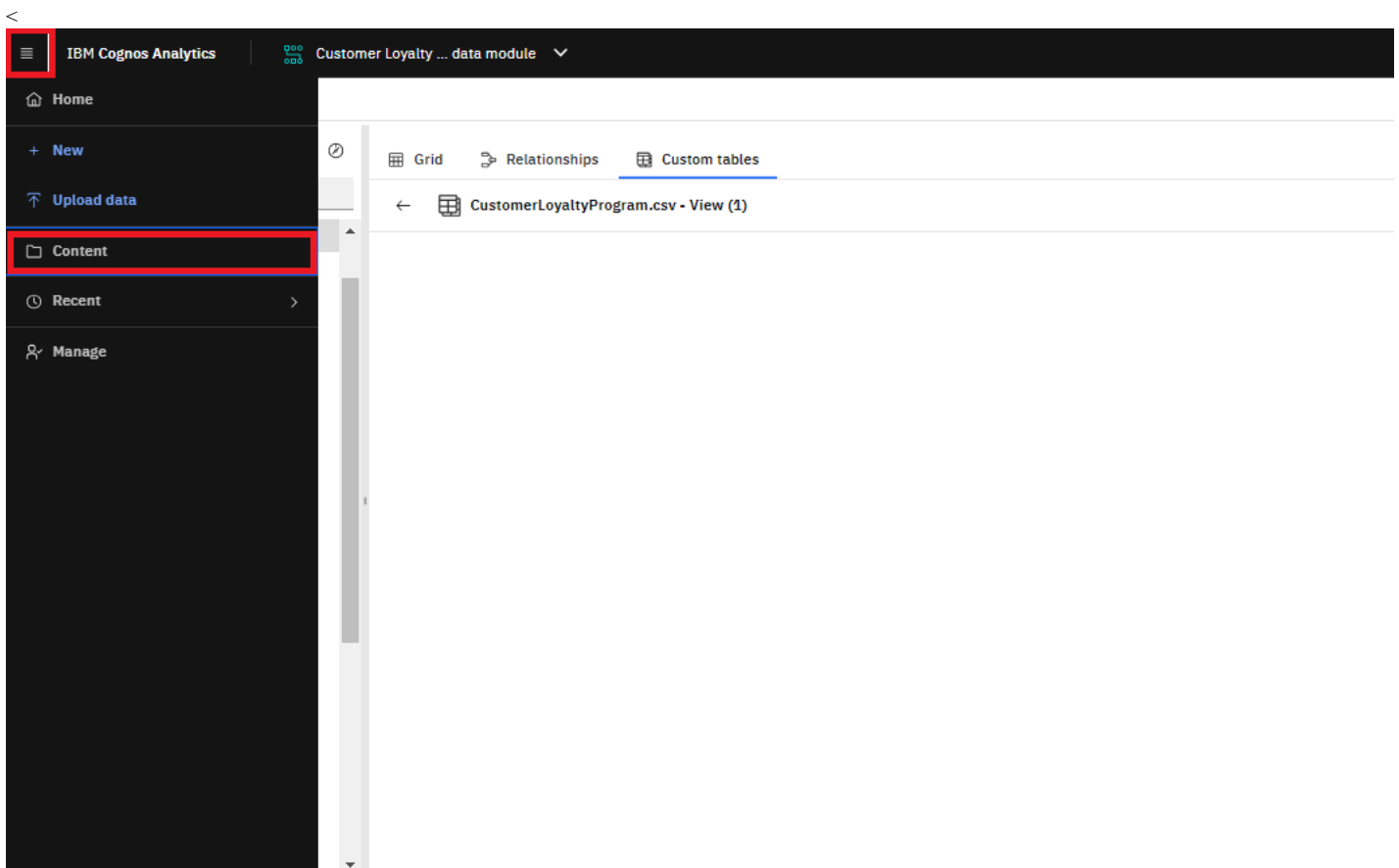
Selected destination: My content

My content Team content

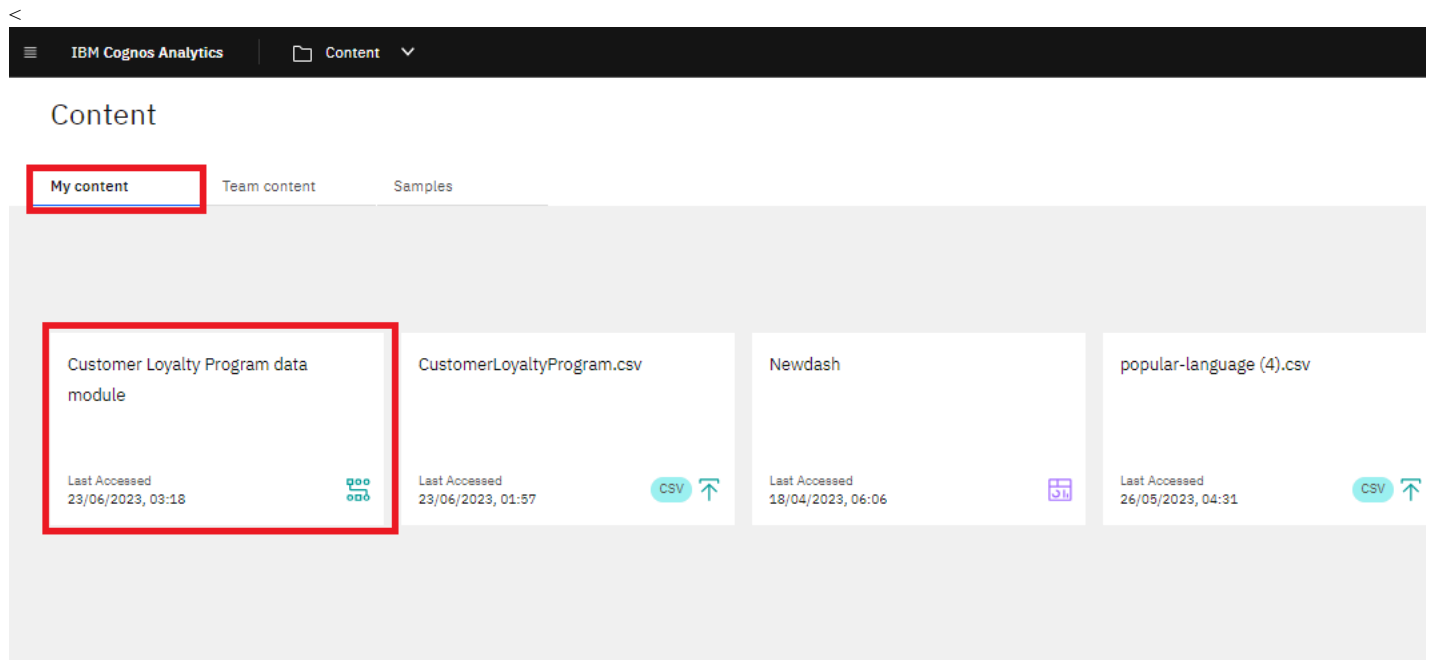
Name	Type	Last Accessed
CustomerLoyaltyProgram.csv CSV	Uploaded file	23/06/2023, 01:57
Newdash	Dashboard	18/04/2023, 06:06
popular-language (4).csv CSV	Uploaded file	26/05/2023, 04:31

Cancel Save

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.

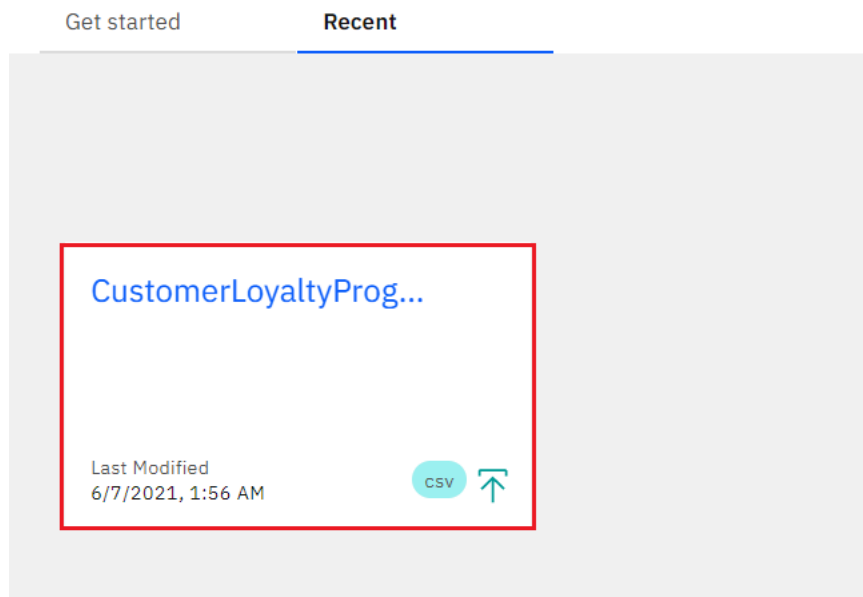


The screenshot shows the IBM Cognos Analytics interface. At the top, there is a navigation bar with a hamburger menu icon, the text "IBM Cognos Analytics", and a "Content" dropdown menu. Below the navigation bar, the word "Content" is displayed. Underneath, there are three tabs: "My content" (which is highlighted with a red box), "Team content", and "Samples". The main area displays a list of content items. The first item, "Customer Loyalty Program data module", is highlighted with a red box. It shows the filename "CustomerLoyaltyProgram.csv", the last accessed date "23/06/2023, 03:18", and a "CSV" icon with an upward arrow. Other items in the list include "Newdash", "popular-language (4).csv", and "CustomerLoyaltyProgram.csv".

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 IBM Cognos Analytics interface. The "Get started" tab is also visible. The main area displays a list of content items. The first item, "CustomerLoyaltyProg...", is highlighted with a red box. It shows the filename "CustomerLoyaltyProgram.csv", the last modified date "6/7/2021, 1:56 AM", and a "CSV" icon with an upward arrow.

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

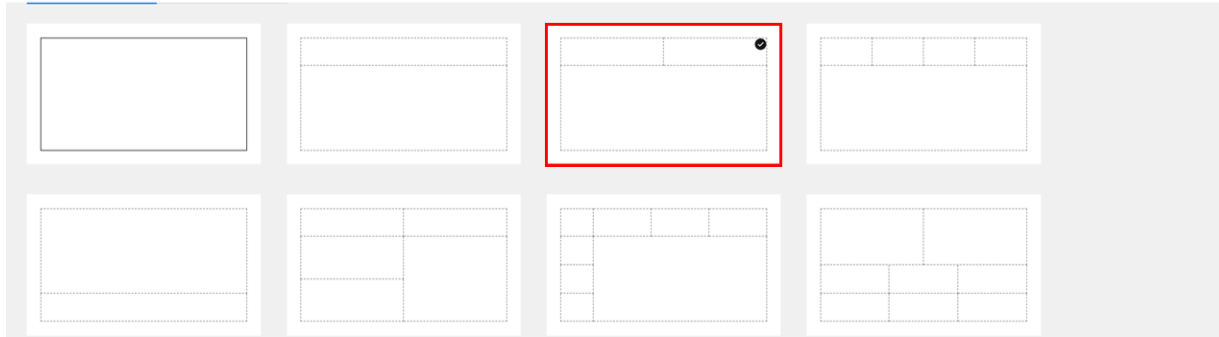
Select a template for your dashboard

Cancel

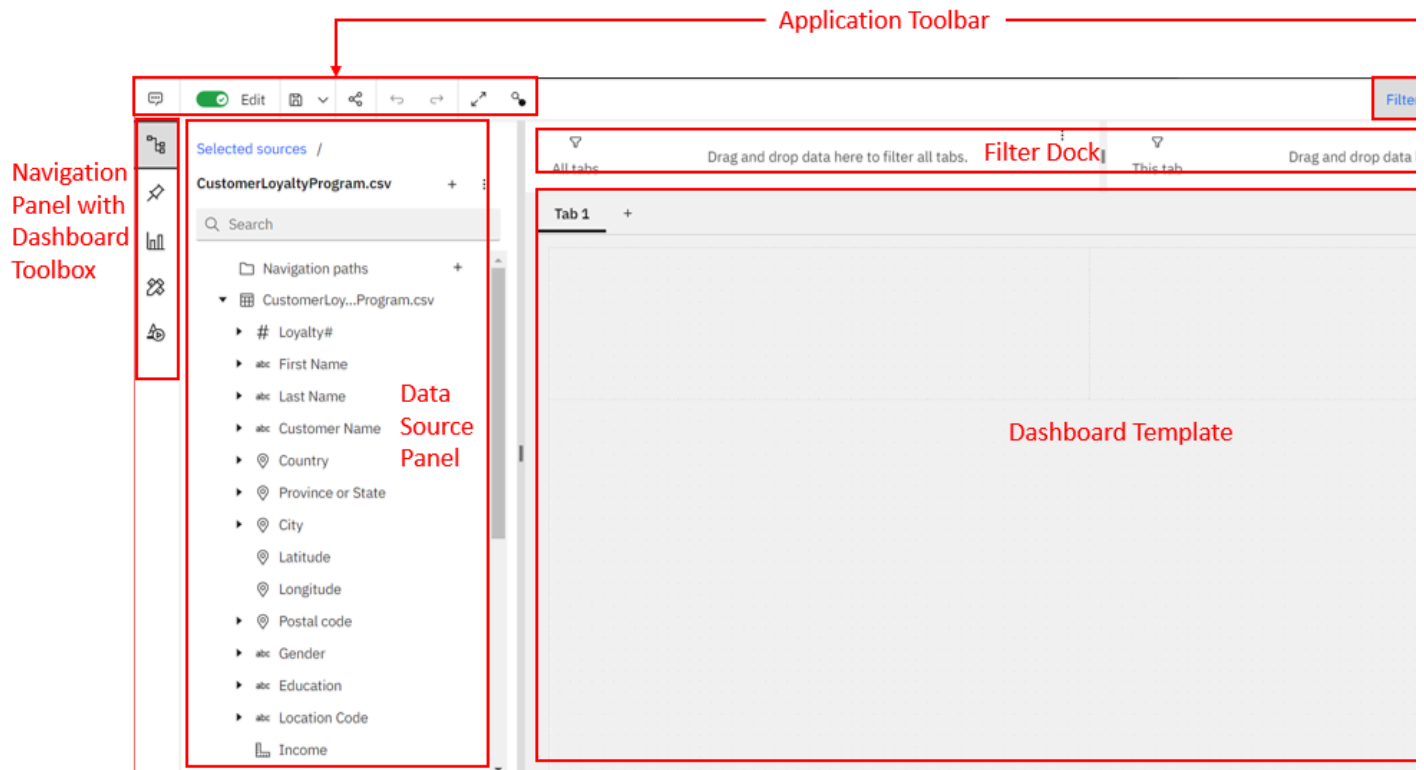
Create

Tabbed

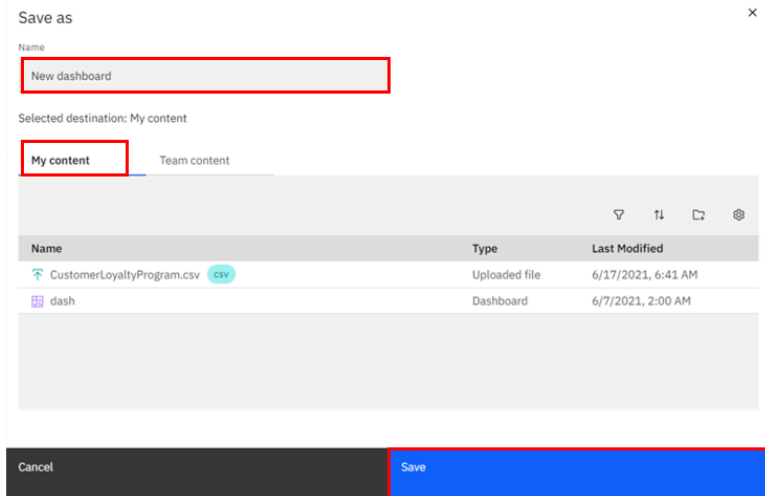
Infographic



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



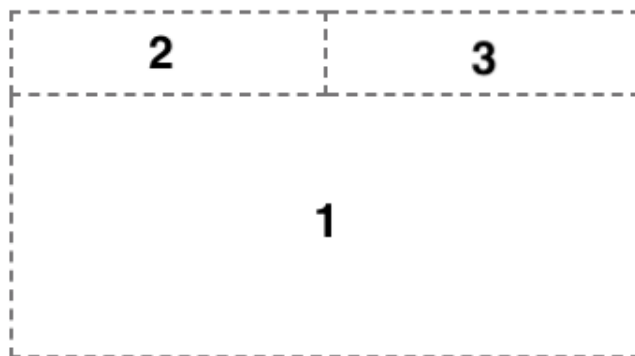
4. To save the newly created dashboard, press **CTRL+S**. Select **My content** as **Destination**. On the **Save as:** text field, write "Simple dashboard", and click **Save**.



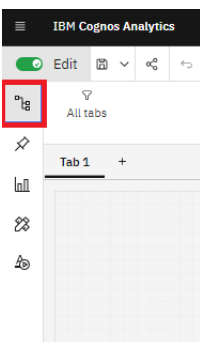
Task D: Create a Simple Dashboard

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

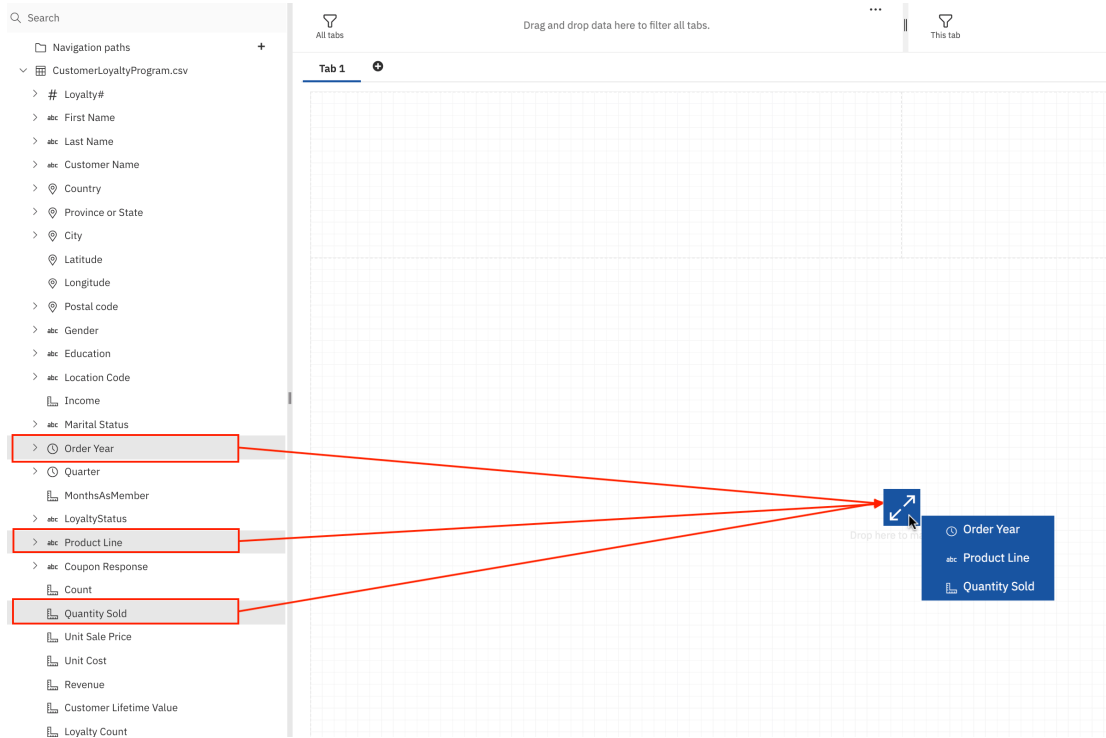
- As you build the dashboard, the location placement for Widgets in the dashboard template will be referenced using the following Panel numbers.



- 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 **CustomerLoyaltyProgram.csv** as the Selected Source.

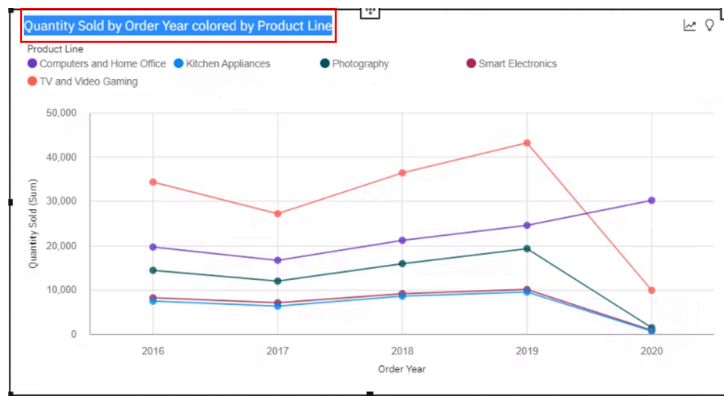


- From the **Data Source** panel, press **CTRL** and select **Order Year, Quantity Sold, Product Line** and drag it to the center of **Panel 1**, releasing them once you see the **drop zone** turn blue.

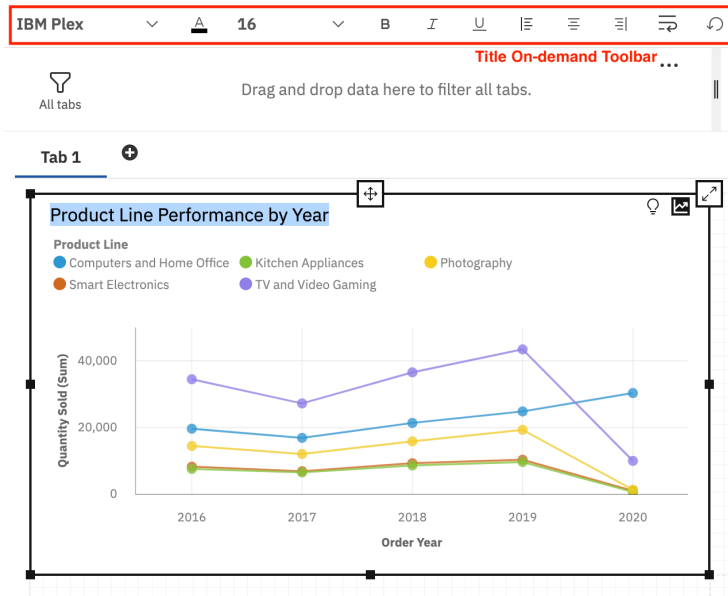


4. Click on the **Line chart** in panel 1 to bring it into focus and render the **on-demand toolbar**.

5. From the on-demand toolbar, select the title and enter the title “Product Line Performance by Year” to the visualization.

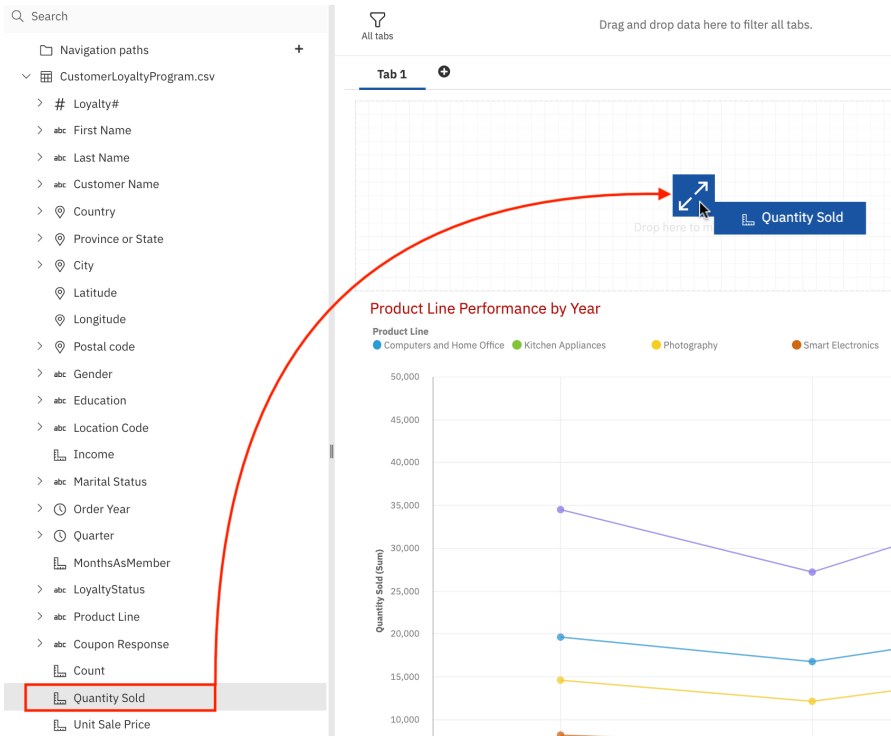


6. Highlight the **Title** to open the **Title on-demand toolbar**. From here, you can change the various properties on the title.



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

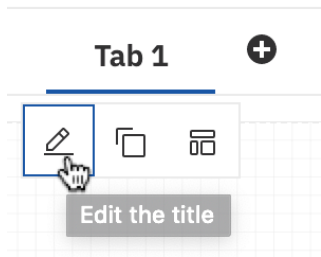
8. From the **Data Source** panel, select **Quantity Sold** and drag it to the center of **Panel 2**, releasing it once you see the **drop zone turn blue**.



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

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

Quantity Sold

Revenue

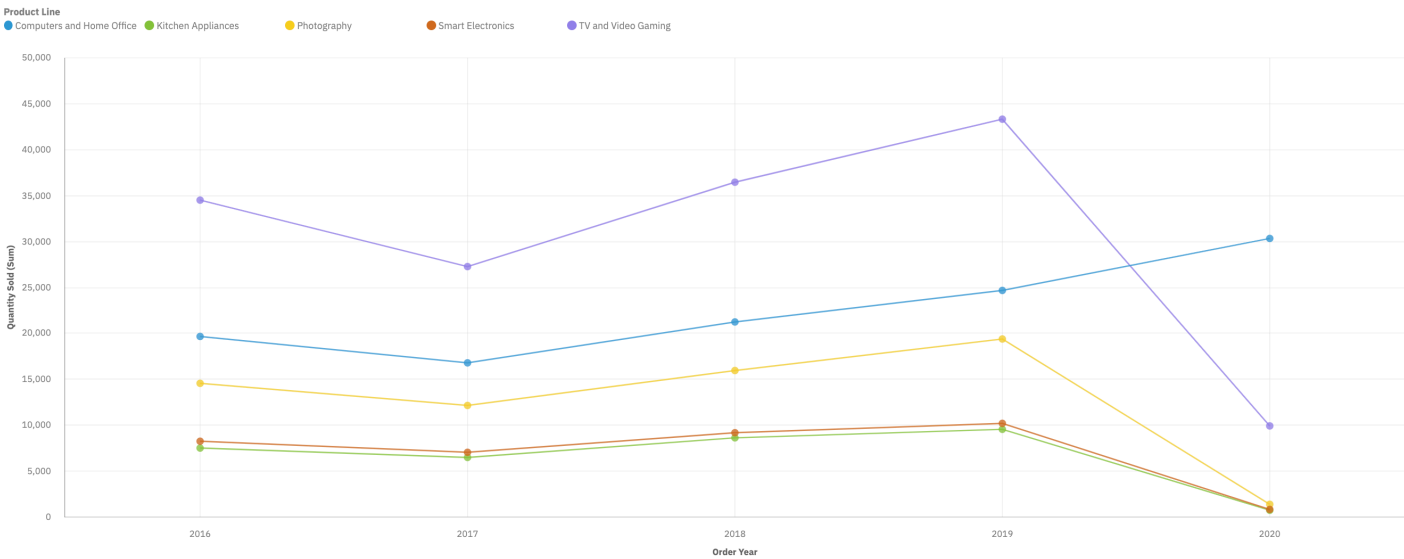
396K

Quantity Sold

\$176,520,879

Revenue

Product Line Performance by Year



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.