

Get the right data to the
right people at the right
time: Experience the
power of enterprise
analytics reporting with
Cognos Analytics

Hands-on lab guide

IBM.

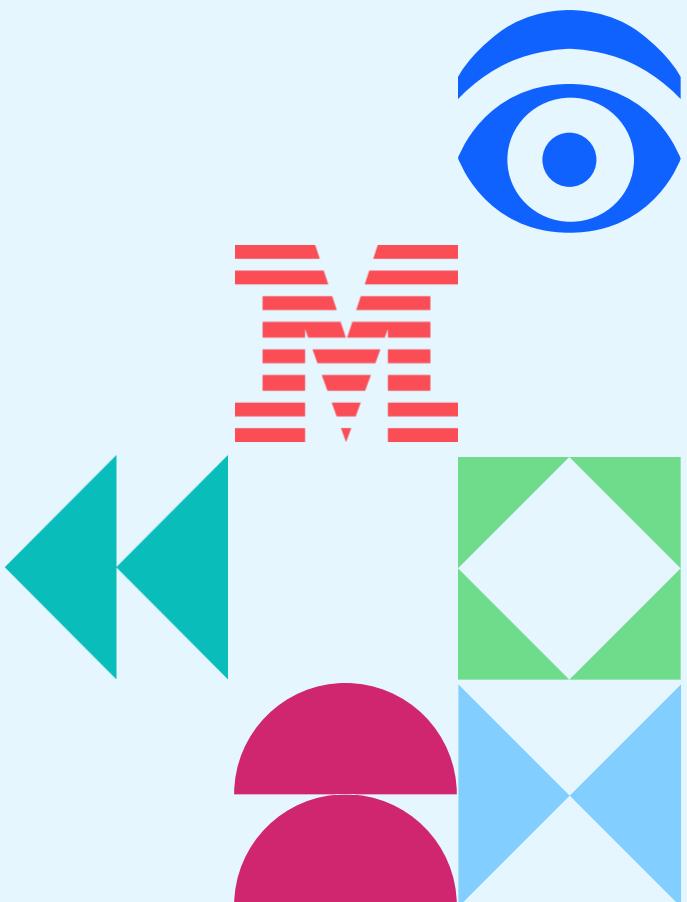


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1 Introduction

1.1 What is Cognos Analytics?

Cognos Analytics is a tool that helps organizations use data to provide that visibility and accountability needed.

With Cognos Analytics, you can access, analyze, and distribute information about your organization to the people that need to be informed about and aligned on your priorities.

One of the many components of the Cognos Analytics capabilities is Cognos Reporting which we'll focus on in this lab.

1.2 What is Cognos Reporting?

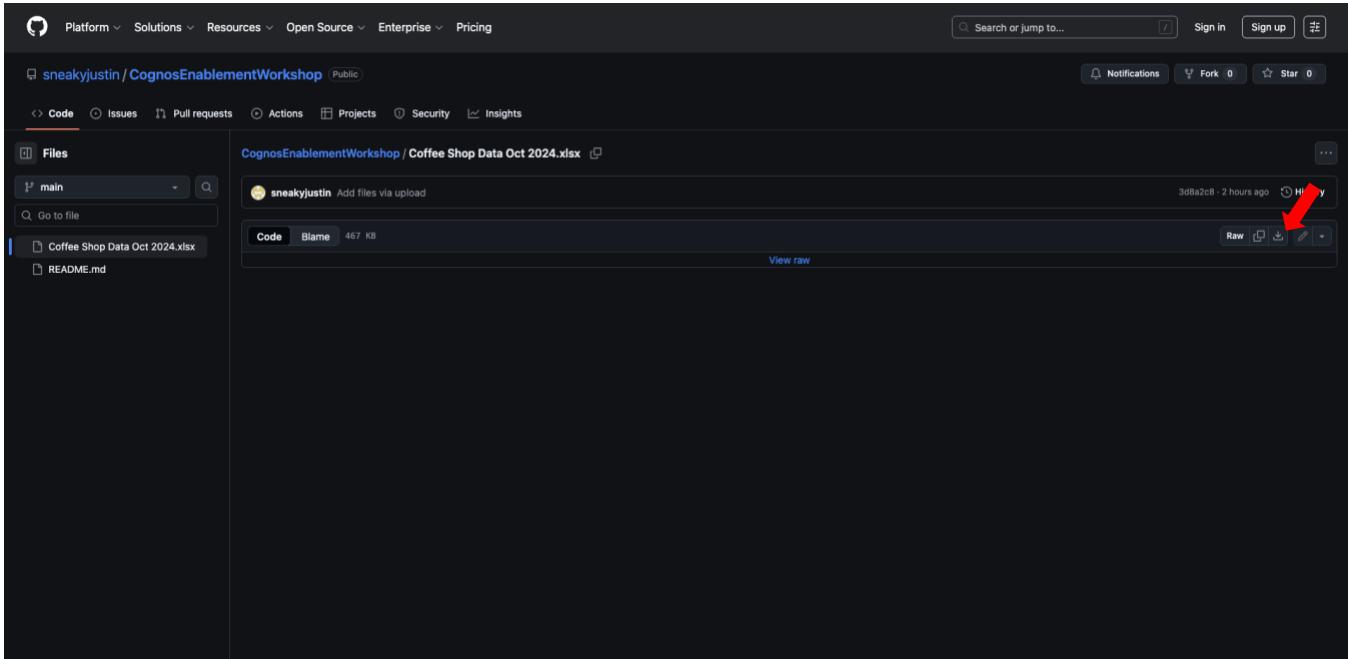
Cognos Reporting allows users to perform ad hoc analysis, create content in forms of visualizations and reports and distribute them to wider audience in many formats. The data in Cognos Analytics can come from a variety of sources. These sources can be “live” connections to your enterprise systems, or “stale” data that you upload at a point in time into the report. Typically, the official organizational data is stored in an enterprise data warehouse to ensure that is it accurate, complete, and secure. But increasingly, data can come from many other sources: it could come from a data lake or a data lakehouse which is a slightly less formalized place to store your data. Data could come from business applications or cloud services you might use as well. And of course, data could come from other people in your organization who have lots of data in Excel or CSV files. The data in report can also be sourced from another list report.

2 Creating your Data

You'll start by uploading a provided Excel file into Cognos and converting it into a data module. This data module will serve as your structured data source for the lab and will be used later when you build your report.

2.1 Uploading your data

You'll start by navigating to this [link](#) and downloading the excel file from the GitHub. The file will be titled Coffee Shop Data Oct 2024 and you can click the download icon next to it to get access to the file.



After you have the file navigate into your Cognos Web Browser and click on the My content section in the middle of your screen FIRST. This makes sure the file gets uploaded to the proper space and click on the hamburger menu in the top left, select new and then Upload data.

The screenshot shows the IBM Cognos Analytics interface. The top navigation bar has a 'New' button highlighted with a red arrow. The left sidebar has a 'Data sources' section with a 'Upload data' option highlighted with a red arrow. The main content area shows a 'Create' section and an 'Assistant' section. Below the main content is a 'My content' tab, which is also highlighted with a red arrow. The bottom of the screen shows a grid of content items like 'By business function', 'By feature', 'By industry', and 'Dashboards'.

From there it will bring you to your downloads folder and select the Coffee Shop excel file and open it to upload it to Cognos. Cognos will begin reading and analyzing the file and once successfully uploaded you should see it in your My content folder.

Welcome, Justin!

You can get started right away by taking a look at our introduction video, product tour and Getting Started tab.

Samples Recent My content Team content Favorites

Coffee Shop Data Oct 2024.xlsx

Last Modified 12/3/2025, 1:01 PM

2.2 Creating a data module

Data modules in Cognos are important because they let you clean, combine, and shape your data directly inside the platform without relying on IT or external modeling tools. They provide a flexible, reusable data foundation that ensures reports and dashboards stay consistent and easy to maintain. We will now create a data module from the uploaded excel file.

From the same page hover next to the heart on the uploaded excel file and 3 dots should appear. Once the dots appear left click on it and then select Create data module.

Welcome, Justin!

You can get started right away by taking a look at our introduction video, product tour and Getting Started tab.

Samples Recent My content Team content Favorites

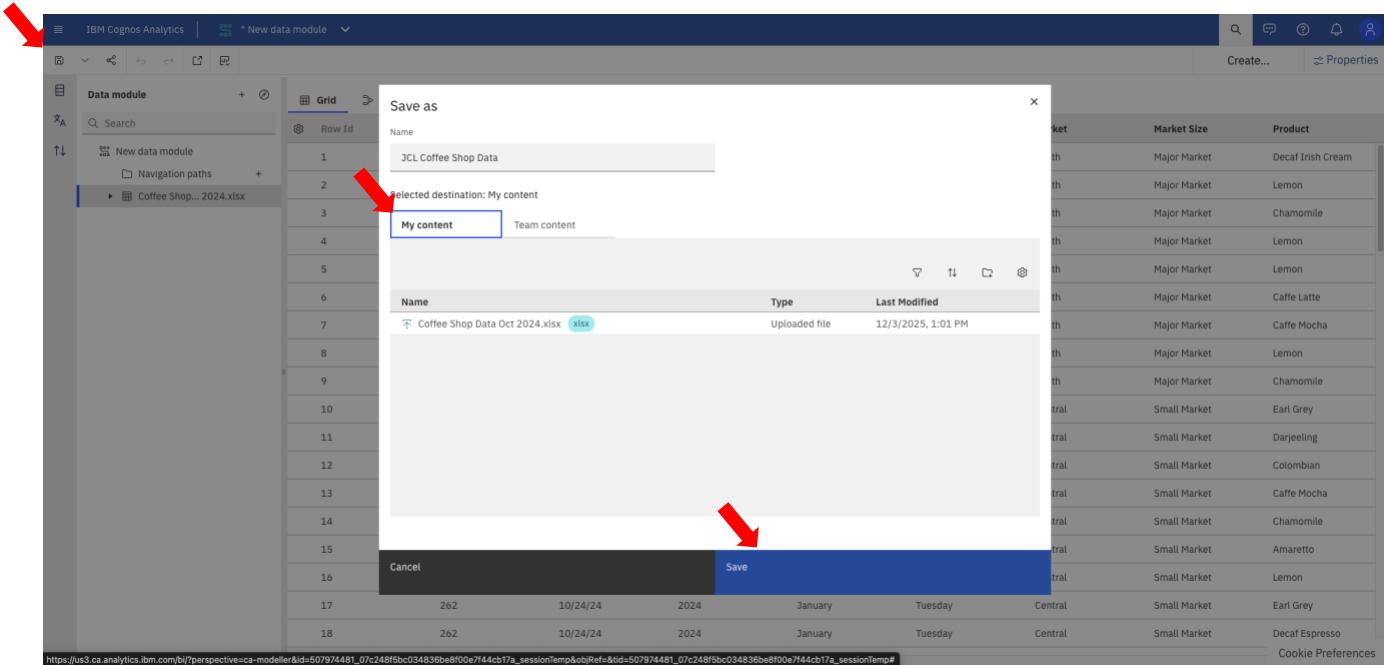
Coffee Shop Data Oct 2024.xlsx

Last Modified 12/3/2025, 1:01 PM

Action menu

- Create exploration
- Create dashboard
- Create data module**
- Replace file
- Append file
- Share
- Copy or move to
- Add shortcut
- Edit name and description
- Add to favorites
- Properties
- Details
- Delete

Once your data module has been created feel free to explore the data in the format and expand the arrow to see all the columns within the data set. Data modules allow you to do all sorts of great things such as perform custom calculations, filter specific columns of data and much more. For today's lab we can leave the data module as is so simply hit the save button and name your data module with your 3 initials (First Middle Last) followed by Coffee Shop Data. So as an example mine would be JCL Coffee Shop Data. Be SURE to save it in My content and you can do so by selecting the My content tab. Screenshot with arrows below.



You now have a data module that we can begin creating a report from!

3 Create a simple report

The goal of this section is to demonstrate ways to create a report in a few minutes that will provide visibility and accountability of data available in the organization. The easiest way to get started is by adding a visualization in a report to understand more of what is going on.

This section consists of interactive tasks that help you learn the reporting interface and create a simple report. From the data module that we just created you can click the Create button in the top right and select Create Report option to get started. If you select Dashboard you won't see the proper templates and will have to go back.

The screenshot shows the IBM Cognos Analytics interface. On the left, there's a sidebar with 'Data module' and 'Search' sections. The main area displays a 'Grid' view of data from 'JCL Coffee Shop Data'. The grid has columns for Row Id, Area Code, Date, Year, Month, Weekday, Market, and Market1... (partially visible). The data shows various coffee items like Decaf Irish Cream, Lemon, Chamomile, etc., across different dates and markets. A red arrow points to the 'Report' button in the top right corner of the interface.

3.1 Templates and Themes

IBM Cognos Analytics includes several basic report templates and color themes that you can choose from when you create a new report. You can also create your own report templates and themes and make them available to other users.

Select 2 over 1 template and click Create button on top right corner.

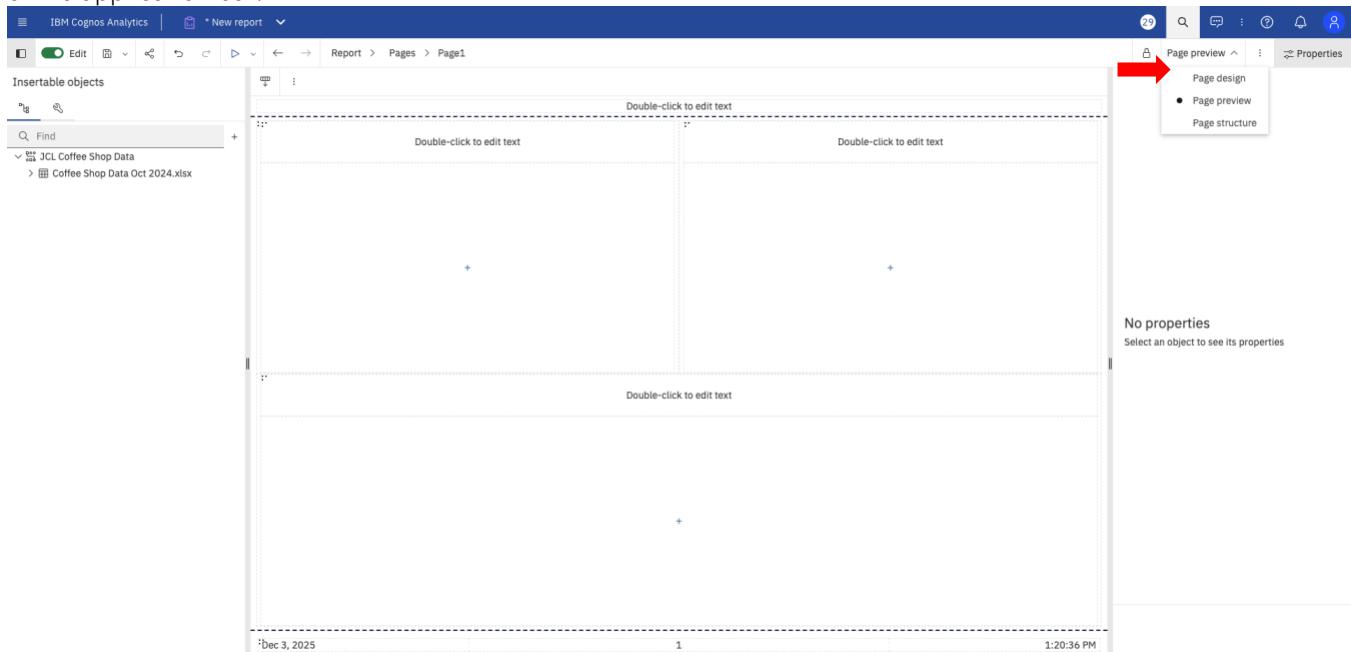
The screenshot shows the 'Create a report' dialog box. Under the 'Templates' tab, there are several layout options: Blank, 1 beside 2, 1 column, 2 by 2, 2 by 3, 2 columns, 2 rows, 3 columns, and 5 tabs. The '2 over 1' template is highlighted with a red arrow. In the top right corner, there are 'Cancel' and 'Create' buttons, with the 'Create' button also highlighted with a red arrow.

3.2 Reporting Page views

Reporting has three views in which you can author reports: Page design view, Page preview view, and Page structure view. The default view is the Page design view. In this view, you can design the report.

The Page Structure view displays all objects of your report in a tree structure, which is organized by page.

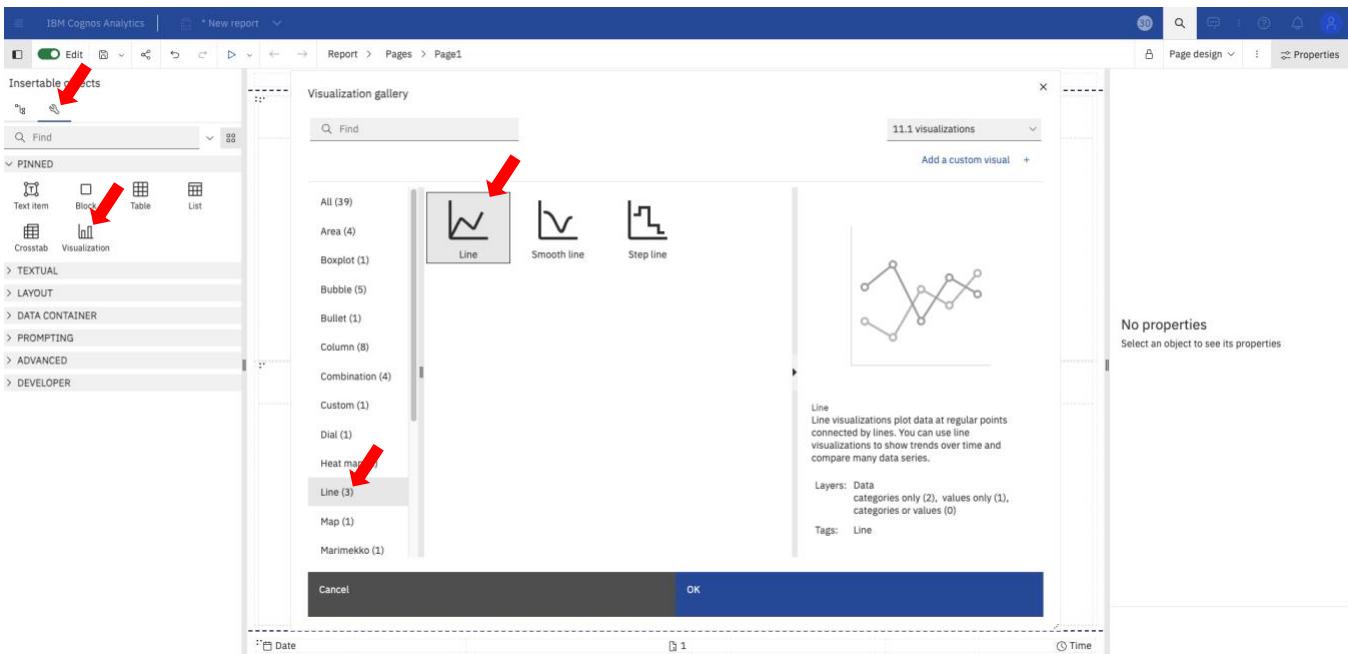
The Page Preview shows you the current report page with live data. In this view, you can also edit the report, such as inserting data items into empty data containers. Click on Page Preview by selecting it from the top right corner of the application bar.



3.3 Add a visualization

You will see a new report canvas. The canvas is split into 3 sections. The section on the left “Insertable objects” consists of Source data items and the Toolbox that contains all the objects that can be added into the report. The section in the middle is the reporting working pane where you can design the report. The section on the right is the properties pane. It shows the properties depending upon the object selected in the middle pane.

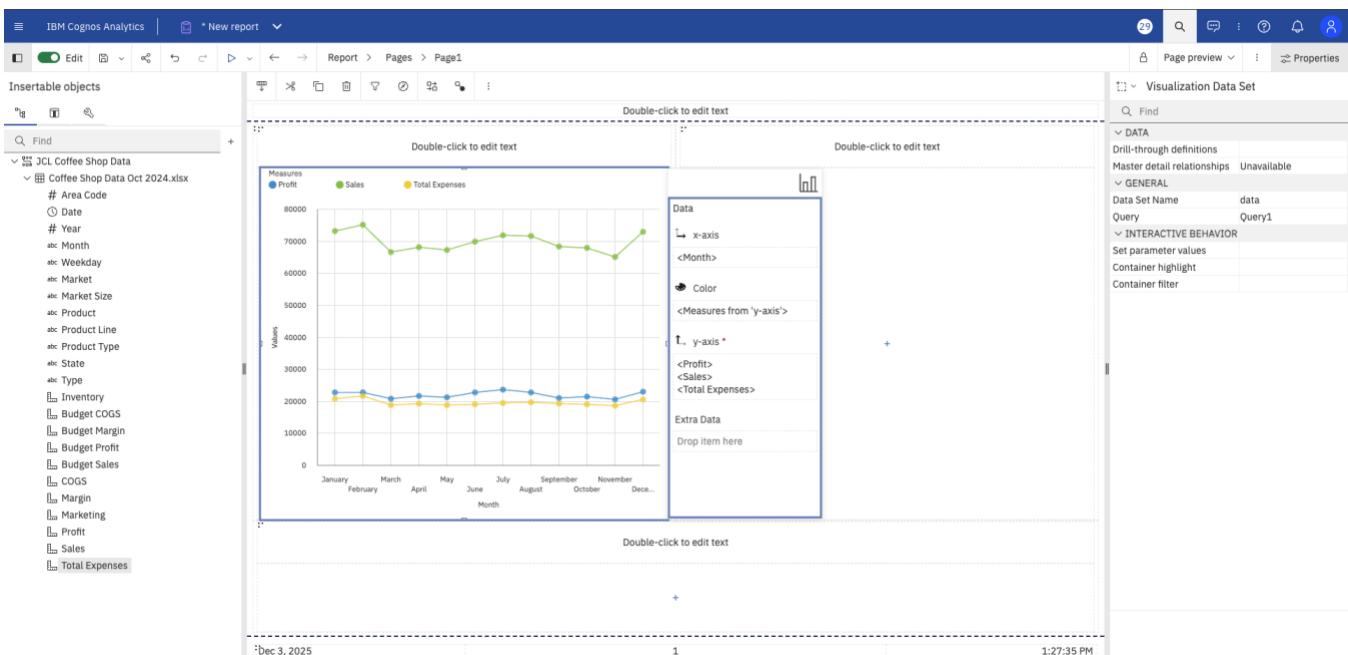
Go to the Toolbox tab on the left side panel and click on visualization. Now drag the Visualization on the first section of the report page. Notice dozens of visualisations are available for use.



o Select the “Line” visualization and click ok.

o Click back into the data sources on the top left to view the different insertable data options, you should also maximize all the data within the data module by selecting the arrow next to the Coffee Shop excel file name. Add the following fields by dragging from the data tree. Add “Month” to the x-axis field and “Total Expenses, Profit and Sales” into the visualization. Don’t try to drag Total Expenses, Profit and Sales into the y-axis, just putting it into the visualization and letting cognos determine on it’s own will work.

The Line visualization shows Sales were highest in months of February and December in the entire year. The trend lines at the bottom show positive Profit over Expenses for each month.

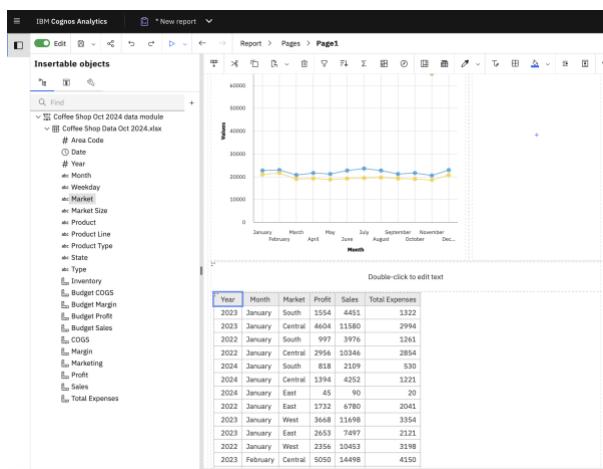


3.4 Add a list object

Go to the Toolbox tab on the left side panel and click on List. Now drag the List at the bottom section of the report page. Keep the defaults in “Object and query name” dialog and click Ok.

From Insertable Objects section, click on Sources tab. Add Year, Month, Market, Total Expenses, Profit and Sales by selecting them and dragging them over to the list object. Optionally, you can double click each item, and it gets added to the list.

The list shows breakdown of Profit, Sales and Total Expenses for Month, Year and Market.



3.5 Add a grouping

The on-demand toolbar contains the actions you can perform on an object. The option on the toolbar varies depending upon your selection on the report page. The same options are also available under the Properties pane.

We will start by adding grouping on some data items. select Year, Month and Market from the list and click on Group/ungroup option from On-demand toolbar as you select each data item..

You will see the data for Year, Month and Market are now grouped in the list.

The screenshot shows the IBM Cognos Analytics interface with a report titled "JCL Coffee Shop Report". The report displays a list of data items from "JCL Coffee Shop Data Oct 2024.xlsx". A red arrow points to the "Summarize" button in the On-demand toolbar. The list includes columns for Year, Month, Market, Total Expenses, Profit, and Sales. A summary row for January 2022 is highlighted in blue, showing "January - Summary" in the Month column and the sum of Total Expenses, Profit, and Sales in the respective columns.

Year	Month	Market	Total Expenses	Profit	Sales
2022	January	Central	2854	2956	10346
		East	2041	1732	6780
		South	1261	997	3976
		West	3198	2356	10453
2023	February	Central	2948	3134	10777
		East	3078	3106	11046
		South	1669	1310	5194
		West	3227	2417	10587
2023	January	Central	2994	4604	11580
		East	2121	2653	7497
		South	1322	1554	4451
		West	3354	3668	11698
2023	February	Central	4150	5050	14498
		East	2051	2734	7374
		South	1279	1550	4348
		West	3227	3589	11280

3.6 Add a summary

One of the other actions you can perform is to apply summary on the list. To do so, select Profit, Sales and Total Expenses from the list and click on Summarize option from the On-demand toolbar and select Default summary.

You will see additional rows added where Profit, Sales and Total Expenses are summarized in the list.

The screenshot shows the IBM Cognos Analytics interface with a report titled "JCL Coffee Shop Report". The report displays a list of data items from "JCL Coffee Shop Data Oct 2024.xlsx". A red arrow points to the "Summarize" button in the On-demand toolbar. The list includes columns for Year, Month, Market, Total Expenses, Profit, and Sales. Multiple summary rows are present, such as "January - Summary" for January 2022, "February - Summary" for February 2022, and "March - Summary" for March 2022. There are also summary rows for the entire year 2022 and 2023.

Year	Month	Market	Total Expenses	Profit	Sales
2022	January	Central	2854	2956	10346
		East	2041	1732	6780
		South	1261	997	3976
		West	3198	2356	10453
	January - Summary		9354	8041	31555
2022	February	Central	2948	3134	10777
		East	3078	3106	11046
		South	1669	1310	5194
		West	3227	2417	10587
	February - Summary		10922	9967	37604
2022	March	Central	2866	3090	10563
		East	2069	1805	6921
		South	1273	1034	4055
		West	3262	2436	10706
	March - Summary		9470	8365	32245
	2022 - Summary		29746	26373	101404
2023	January	Central	2994	4604	11580
		East	2121	2653	7497
		South	1322	1554	4451
		West	3354	3668	11698
	January - Summary		9791	12479	35226
2023	February	Central	4150	5050	14498
		East	2051	2734	7374

3.7 Styling options

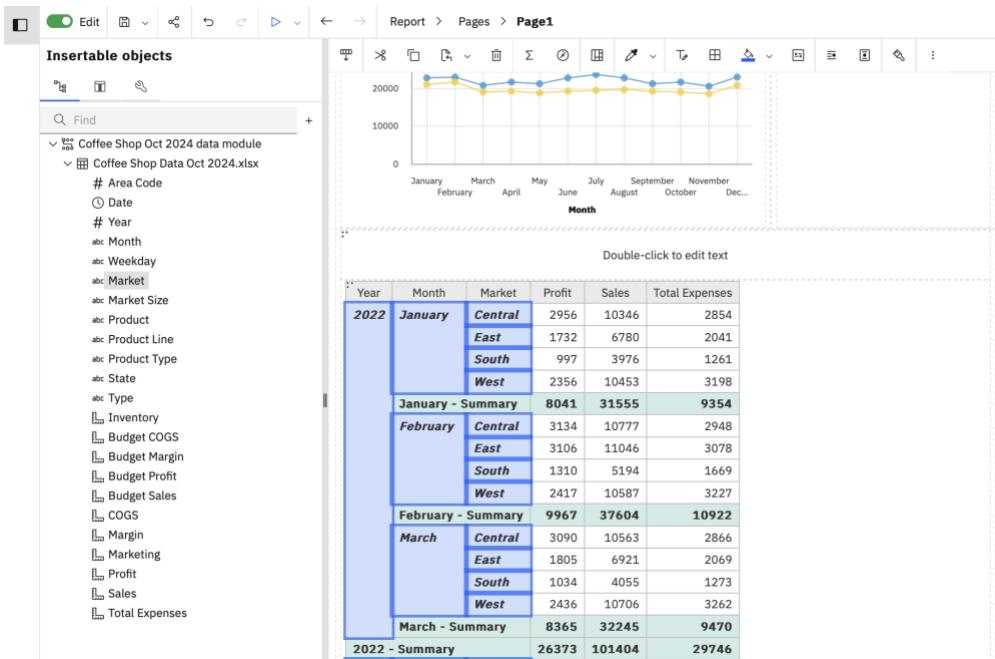
Let's explore styling options. There is a lot you can change such as text font, style, background color, foreground color, size and positioning etc. A report author has an option to save the Style so it can be reused by all the other report authors.

For this purpose, we will simply change the Font style to show how easy is it to change these options. To do so, select data under Year, Month and Market from the list and click on Style current selection option from the On-demand toolbar and select New style. A new Style Dialog opens. Select Bold under Weight and Italic style. Under Style name, enter “Bold Italic text”. Click Apply, Save style and Close.

You will see the data for Year, Month and Market is now in Italic Bold font.

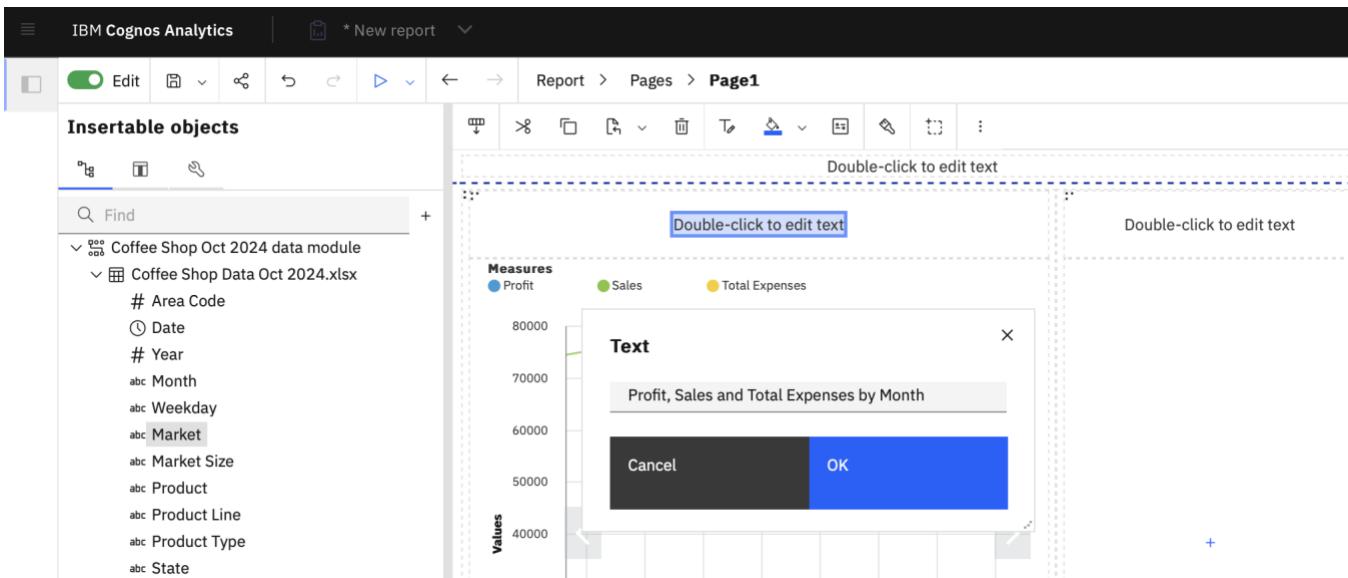
Year	Month	Market	Profit	Sales	Total Expenses
2022	January	Central	2956	10346	2854
		East	1732	6780	2041
		South	997	3976	1261
		West	2356	10453	3198
	January - Summary		8041	31555	9354
	February	Central	3134	10777	2948
		East	3106	11046	3078
		South	1310	5194	1669
		West	2417	10587	3227
	February - Summary		9967	37604	10922
	March	Central	3090	10563	2866
		East	1805	6921	2069
		South	1034	4055	1273
		West	2436	10706	3262
	March - Summary		8365	32245	9470
	2022 - Summary		26373	101404	29746
2023	January	Central	4604	11580	2994

The screenshot shows the 'Style' dialog box open in the IBM Cognos Analytics interface. The 'Style name' field contains 'Bold Italic text'. The 'Font' section is expanded, showing 'Weight' set to 'Bold' and 'Style' set to 'Italic'. The 'Text' tab is active. At the bottom of the dialog are buttons for 'Undo changes', 'Close', 'Apply', and 'Save style'. The background shows a report with a table and a chart.



3.8 Add titles and apply style

To add a title, you can simply click on the place holder created with the template chosen for this report. Double click on the title for the visualization added on top of the report page. Type “Profit, Sales and Total Expenses by Month”. Click Ok.



Let's add title for the list created at the bottom on the page. Double click on title placeholder just above the list, type “Sales Market Summary”. Click Ok. Let's apply the style saved in section prior to this. Select the title, click Style current selection from on-demand toolbar. Choose style “Bold Italic Text” and click Apply. The title is now in bold italic text. Apply the same style option for the title added for top visualization following the same step.

Now click on empty white space outside the Sales Market Summary title to select the table cell. In the properties section, you see the Horizontal alignment is set to Center. Click on the drop down to change it to Left. Set Left alignment for the visualization title as well.

The screenshot shows the IBM Cognos Analytics interface with a report titled "JCL Coffee Shop Report". On the left, the "Insertable objects" pane lists various data sources and modules. In the center, there is a table titled "Sales Market Summary" with data for years 2022 and 2023 across different months and regions. To the right, the "Properties" panel is open for the table cell. Under the "Table cell" section, the "Horizontal alignment" dropdown is shown, with "Left" selected. A red arrow points to this selection. Below the dropdown, a tooltip explains that horizontal alignment specifies how the contents of the selected object are aligned horizontally.

3.9 Running a report

Run your report to see the data that is retrieved. You can also run a report or a group of reports together. You can specify not to render a report page if it does not contain any data.

When you run a report in an export format such as PDF, delimited text (CSV), Microsoft Excel spreadsheet software (XLS), the IBM Cognos report name is used as the exported file name.

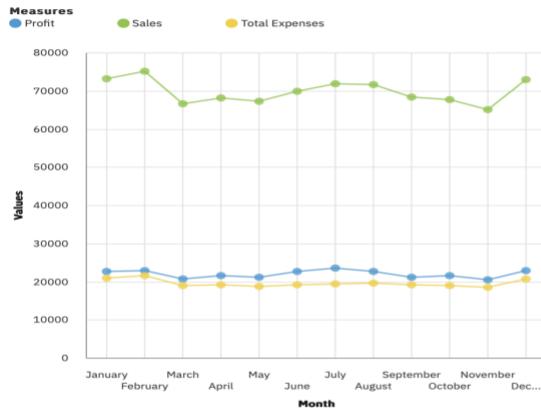
Click on Run button from toolbar and click Run HTML. A new window opens up rendering entire report in HTML format.

The screenshot shows the IBM Cognos Analytics interface with a report titled "New report". The toolbar has the "Run HTML" button highlighted. The main area displays a line chart titled "Sales and Total Expenses by Month" with two data series: "Sales" (green line with circles) and "Total Expenses" (yellow line with circles). The chart shows monthly data points for both metrics. The "Insertable objects" pane on the left lists various data sources and modules, including "Coffee Shop Data Oct 2024.xlsx".

IBM Cognos Analytics | New report | HTML

File | Open | Save | Print | Refresh | HTML

Profit, Sales and Total Expenses by Month



Sales Market Summary

Year	Month	Market	Profit	Sales	Total Expenses
2022	January	Central	2956	10346	2854
		East	1732	6780	2041
		South	997	3976	1261
		West	2356	10453	3198
		January - Summary	8041	31555	9354

Top Page up Page down Bottom

After viewing your report close out the window and go ahead and save the report in the format of your initials followed by Coffee Shop Report. Ex. JCL Coffee Shop Report.

IBM Cognos Analytics | JCL Coffee Shop Report

File | Edit | Save As... | Convert to Template | Convert to Active Report | Find

Insertable object | Block | Find | Page preview | Properties

JCL Coffee Shop Data

Double-click to edit text

Double-click to edit text

Measures

- Profit
- Sales
- Total Expenses

Year	Month	Market	Total Expenses	Profit	Sales
2022	January	Central	2854	2956	10346
		East	2041	1732	6780

Horizontal alignment

Specifies how the contents of the selected object are aligned horizontally.

4 Modifying a report

This section consists of interactive tasks that help you learn the Reporting Interface and walk you through making small changes to the report.

4.1 Navigating Metadata tree

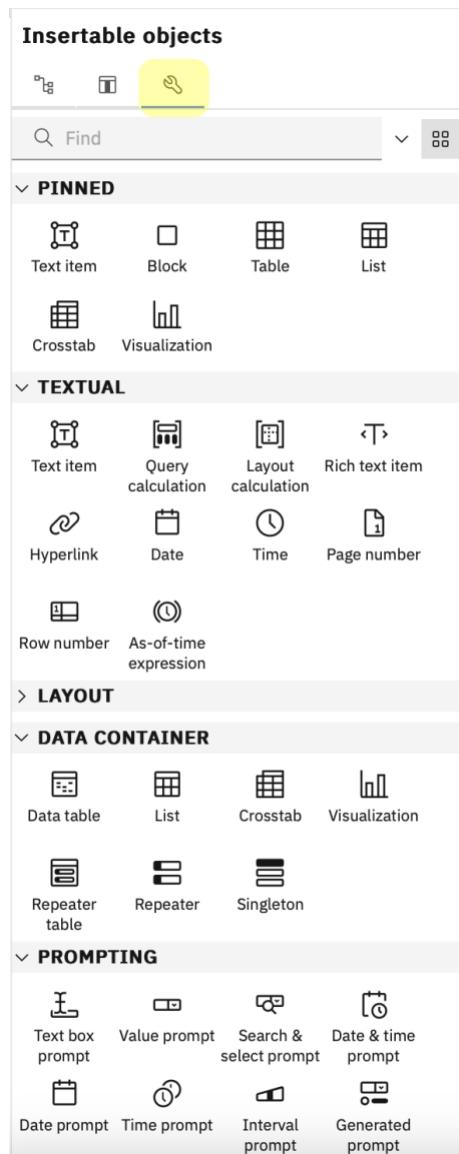
The Sources tab shows metadata tree on the left of the reporting canvas listing all the data source objects that are available for use in reports. Data sources can be very large with thousands of items in it. The user can click on each node and expand/collapse them as desired. Search can also be performed to quickly find the data item.

The screenshot shows the 'Sources' tab in the IBM Cognos Analytics interface. At the top, there is a toolbar with various icons: a square icon, a gear icon labeled 'Edit', a magnifying glass icon, a double arrow icon, a circular arrow icon, a double right arrow icon, and a left arrow icon. The title bar says 'IBM Cognos Analytics' and has a 'New report' button. Below the toolbar, the main area is titled 'Insertable objects'. A search bar with a magnifying glass icon and the word 'Find' is located at the top of this area. To the right of the search bar is a '+' button. The main content area displays a hierarchical list of data objects under a expanded node 'Coffee Shop Oct 2024 data module'. The objects listed are:

- ✓ **Coffee Shop Data Oct 2024.xlsx**
 - # Area Code
 - ⌚ Date
 - # Year
 - abc Month
 - abc Weekday
 - abc Market
 - abc Market Size
 - abc Product
 - abc Product Line
 - abc Product Type
 - abc State
 - abc Type
 - ↳ Inventory
 - ↳ Budget COGS
 - ↳ Budget Margin
 - ↳ Budget Profit
 - ↳ Budget Sales
 - ↳ COGS
 - ↳ Margin
 - ↳ Marketing
 - ↳ Profit
 - ↳ Sales
 - ↳ Total Expenses

4.2 Viewing Toolbox

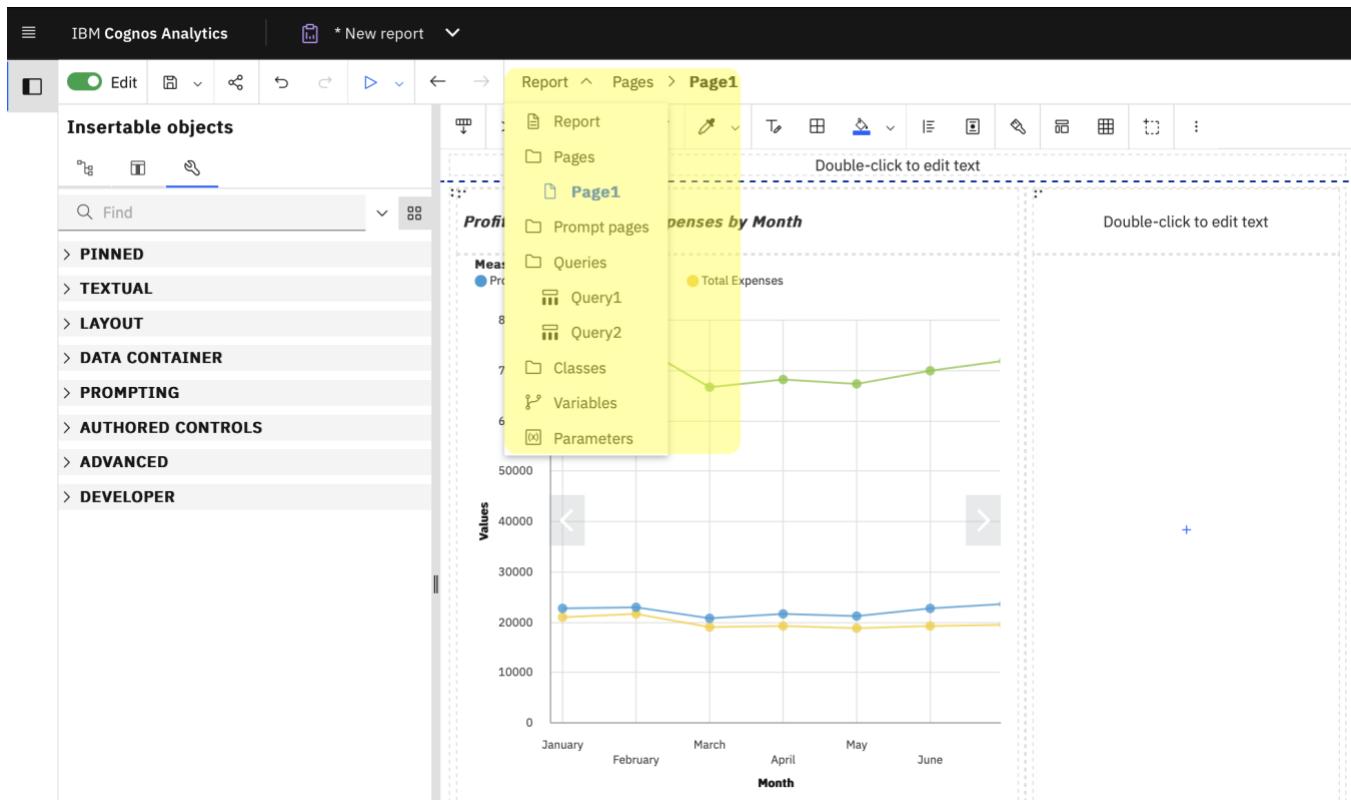
The Toolbox tab on the left contains various objects that you can add to a report, such as visualizations, text, layout objects, and prompts. You can also add advanced objects such as custom controls and hyperlinks. Click on the Toolbox tab. The screen shot shows some of the options. You can navigate to see complete list. This list is also customizable. You can exclude items and add more custom objects to this to meet your organization needs.



4.3 Navigation menu

You can quickly navigate through the pages, prompt pages, queries, classes, and variables in a report by selecting an item in the navigation menu.

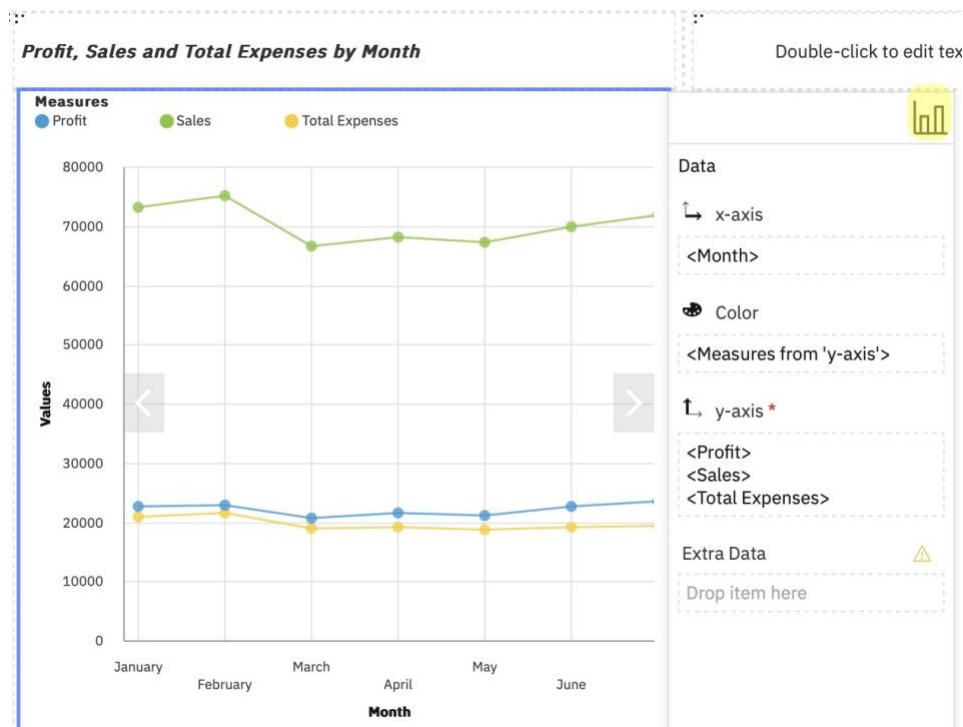
A Cognos report can have multiple pages in it. In this sample, you only see one page. Click on Navigation menu in middle of the page and then click on Pages – Page1. You see the Pages pane. Double click on Page 1 to go back to the Page view.

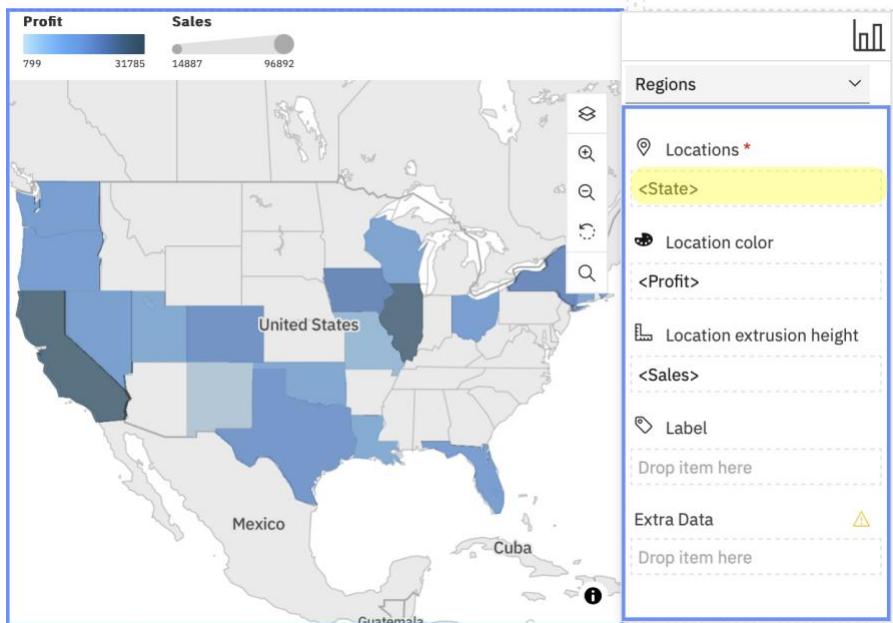
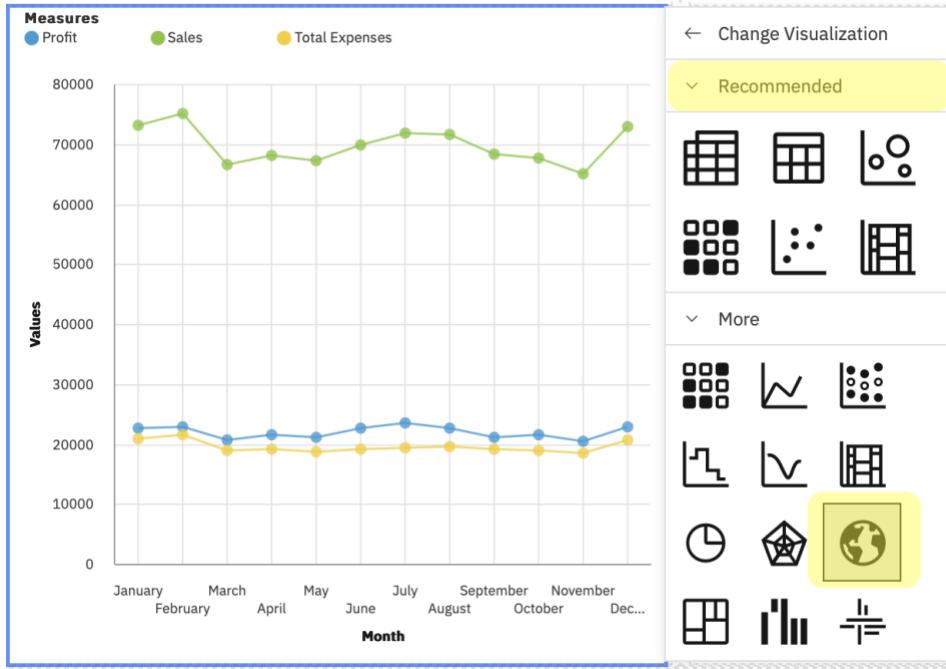


4.4 Change a Visualization to another type

You can change a visualization from one type to another type. When you make this change, reporting keeps the properties from the existing visualization if those properties exist in the new chart type. Let's change the Line chart to a map. Select the Line chart and click on the chart icon that appears on top right corner. It expands into the list all of visualizations, select Map from it by clicking twice on it.

Now drag State from the Source tab into Locations slot in a map visualization. You will see the Line chart is not converted to a map visualization which shows the variations of blue. The darker the shade of blue, higher the profit is for that state. Change the title of this chart to Profit and Sales by State.

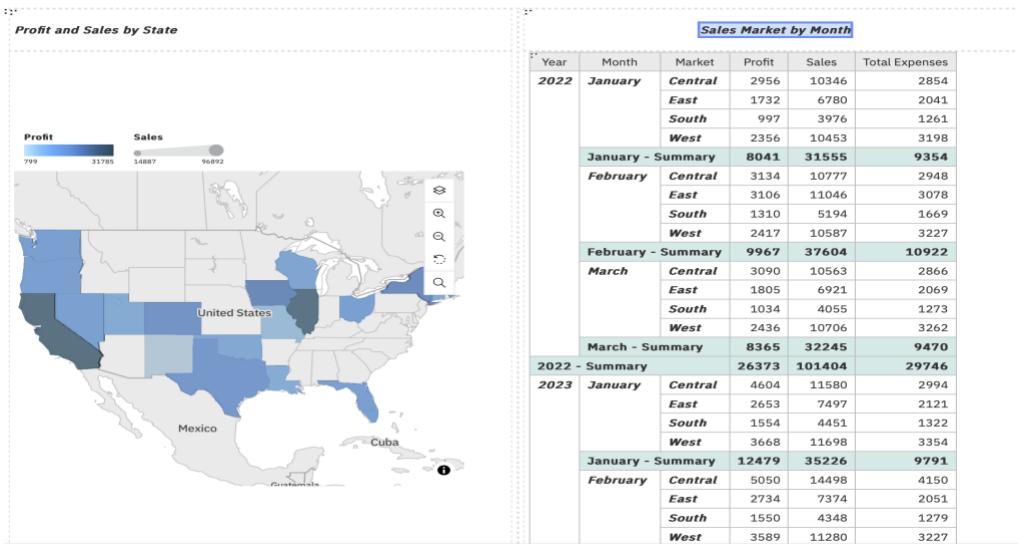




4.5 Modifying an existing report

You can simply drag and drop objects in the canvas. Let's select the List object created at the bottom of the page. To do so, click on the 3 dots on top left of the list object and drag it over to the empty space next to the map visualization.

Add a new title for this list as Sales Market by Month. Apply Bold Italic style to it by clicking on Select current style option from on-demand toolbar.



4.6 Changing properties

You can change properties of an object with on-demand toolbar or via Properties pane on the right.

Select Map visualization and navigate to Properties pane on the right. Click on Region continuous color option from the Color Palette section. Expand System and select Green sequential option. Click Back.

The figure shows the same dashboard as above, but with a green sequential color palette applied to the map. The color palette is visible in the Properties pane on the right under the 'System' section. The map now uses a green gradient to represent profit levels across the states.

Select the summary data items in the list to make the colors consistent. To select multiple data items, you will have to select Shift and click. From properties pane, click on Background color. You can pick from Basic color tab , color swatch or make a custom color. In this case, chose a green color from Color swatch. Click Apply then OK.

The screenshot shows the Cognos Reporting interface with the Properties pane open. The 'List cell' section is selected. Under the 'COLOR & BACKGROUND' category, the 'Background color' field is set to a dark green color (#339900). The 'Color swatch' tab is active, showing a grid of color swatches. The 'OK' button at the bottom of the color picker is highlighted in blue.

Year	Month	Market	Profit	Sales	Total Expenses
2022	January	Central	2956	10346	2854
		East	1732	6780	2041
		South	997	3976	1261
		West	2356	10453	3198
January - Summary		8041	31555	9354	
February	Central	3134	10777	2948	
	East	3106	11046	3078	
	South	1310	5194	1669	
	West	2417	10587	3227	
February - Summary		9967	37604	10922	
March	Central	3090	10563	2866	
	East	1805	6921	2069	
	South	1034	4055	1273	
	West	2436	10706	3262	
March - Summary		8365	32245	9470	
2022 - Summary		26373	101404	29746	
2023	January	Central	4604	11580	2994
		East	2653	7497	2121
		South	1554	4451	1322
		West	3668	11698	3354
January - Summary		12479	35226	9791	

Change Horizontal alignment for all objects on the report to Center. To do so, select the Table cell that contains map viz, list object, and their titles and click on Horizontal alignment in Properties pane. Select Center from the drop down. You will have to perform control + click to select multiple items.

4.7 Modify a query/apply filter to it

Cognos Reporting is a powerful tool. It not only allows a report author to add object using layout elements, it also allows the report author to apply modelling techniques in queries. Cognos Reporting automatically creates the queries you need as you build reports. However, you can modify these queries or create your own custom queries to get the results you want.

Queries determine what data items appear in the report. Sometimes you want detailed rows of data, which you obtain by using a simple SELECT statement. Other times you must calculate totals or averages using summary functions and grouped columns or must apply filters to show only the data you want.

Let's start by applying a filter directly in the query. Select the list object by clicking on 3 dots of top left corner of list. In properties pane, there is a Data section. In there you can see that this list is associated with Query 2.

Year	Month	Market	Profit	Sales	Total Expenses
2022	January	Central	2956	10346	2854
		East	1732	6780	2041
		South	997	3976	1261
		West	2356	10453	3198
	January - Summary		8041	31555	9354
	February	Central	3134	10777	2948
		East	3106	11046	3078
		South	1310	5194	1669
		West	2417	10587	3227
	February - Summary		9967	37604	10922
	March	Central	3090	10563	2866
		East	1805	6921	2069
		South	1034	4055	1273
		West	2436	10706	3262
	March - Summary		8365	32245	9470
2022 - Summary		26373	101404	29746	
2023	January	Central	4604	11580	2994
		East	2653	7497	2121
		South	1554	4451	1322
		West	3668	11698	3354
	January - Summary		12479	35226	9791
	February	Central	5050	14498	4150
		East	2734	7374	2051
		South	1550	4348	1279
		West	3589	11280	3227
	February - Summary		12923	37500	10707

List

Conditional styles

Style variable

Render variable

No data contents

No Data Available

DATA

Grouping & sorting

(Defined)

Query

Query2

Rows per page

Master detail relationships

Unavailable

Suppression

Properties

Share result set

GENERAL

Contents height

Minimal

Column titles

At start of list

Scrollable area height

Pagination

(Defined)

RSIframe

der page when empty

BOX

Border

Margin

Box type

COLOR & BACKGROUND

Background image

Background color

Foreground color

Drop shadow

FONT & TEXT

Font

Horizontal alignment

From navigation pane, select Query2.

The screenshot shows the IBM Cognos Analytics report editor interface. On the left, the Insertable objects pane lists various data sources and objects. In the center, there is a map of the United States where states are colored according to their profit levels, with a legend showing 'Profit' from 798 to 2956. To the right of the map is a table titled 'Sales Market by Month'.

Year	Month	Market	Total Expenses	Profit	Sales
2022	January	Central	2854	2956	10346
		East	2041	1732	6780
		South	1261	997	3976
		West	3198	2356	10453
February		Central	2948	3134	10777
		East	3078	3106	11046
		South	1669	1310	5194
		West	3227	2417	10587
March		Central	2866	3090	10563
		East	2069	1805	6921
		South	1273	1034	4055
		West	3262	2436	10706
2022 - Summary			29746	26373	101404
2023	January	Central	2994	4604	11580
		East	2121	2653	7497
		South	1322	1554	4451
		West	3354	3668	11698
		Central	4150	5050	14498
		East	2051	2734	7374
		South	1279	1550	4348
		West			

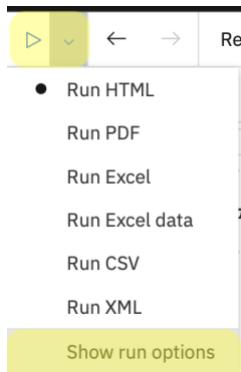
Apply filter for year 2023 in Query2. To do so, select Year from Data Items and drag it under Detail Filters section. It will open the Detail filter expression dialog. The expression definition should already have Year there. Simply add “=2023” behind it and click ok.

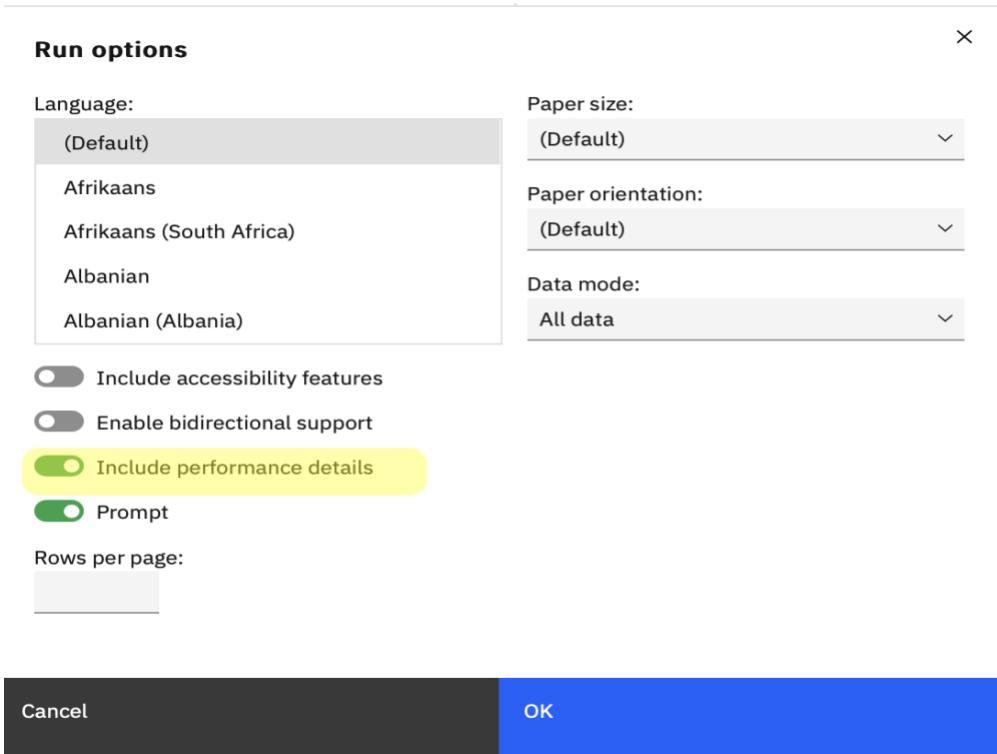
The screenshot shows the RSISframe software interface. In the top navigation bar, it says 'Report > Queries > Query2'. On the left, there's a sidebar with 'Data Items' and 'Detail Filters' sections. The 'Data Items' section contains items like Year, Month, Market, Profit, Sales, Total Expenses, and various Summary items. The 'Detail Filters' section is currently empty. A modal window titled 'Detail filter expression - Query2' is open. It has a 'Available Components:' section listing items from the 'Coffee Shop Oct 2024 data module' such as Area Code, Date, Year, Month, Weekday, Market, Market Size, Product, and Product Line. Below this is an 'Expression Definition:' field containing '[Year]=2023'. There are tabs for 'Information', 'Tips', and 'Errors' at the bottom of the modal. At the very bottom are 'Cancel' and 'OK' buttons.

Click on navigation pane and then on to Page 1 and you will see the report output is updated to show data for 2023 only.

4.8 Run options

Run options are designed for report authors to help them during the design process of a report. You can invoke this option by clicking on Run actions and then on Show run options.





There are many options included in this dialog. With the option **Include performance details**, you can view query and rendering performance on report objects in Cognos Reporting.

The option **Include performance details** is designed for authors that want to interactively view the performance of their reports. This is very beneficial for the reports that have large datasets and many queries going back to the database. You can use this option while you are designing your page by running as HTML or by using the preview mode within the authoring mode.

Enable **Include performance details** and click **Ok**. Now run the report in HTML format and you will see the query execution times are added at the bottom of the report page. Close this report output tab.

IBM Cognos Analytics | New report ▾

① Maintenance: Satellite Connector is aimed to be released in September 2024. Click on More Info to see what Action is Required

Map visualization showing Profit and Sales data across the United States and surrounding regions. The map uses a color scale from dark green (low) to dark red (high). A legend indicates Profit (799 to 31785) and Sales (96892 to 31785).

Region	Central	East	South	West
January - Summary	12479	35226	9791	
February - Summary	12923	37500	10707	
March - Summary	12359	34218	9431	
April - Summary	8732	33140	9655	
May - Summary	8961	33820	9750	

30-Aug-24

Total Execution Time [Request Id: ddM294MCG98iCG99viMyIhsW2CvCn9svvhG4h2Co]: 877 ms. ①

4.9 Save a report

Click on Save As and name the report “<your initials>Coffee Shop Report”. Click Save.

IBM Cognos Analytics | * JCL Coffee Shop Report | 29 | 🔍 | 🚙 | 📁 | 🎯 | 📡 | 📃 | 🔔

Report > Pages > Page1

Page preview | Properties

Insertable objects

Find

JCL Coffee Shop Data

- Coffee Shop Data Oct 2024.xlsx
 - # Area Code
 - ① Date
 - # Year
 - ⌘ Month
 - ⌘ Weekday
 - ⌘ Market
 - ⌘ Market Size
 - ⌘ Product
 - ⌘ Product Line
 - ⌘ Product Type
 - ⌘ State
 - ⌘ Type
 - ↳ Inventory
 - ↳ Budget COGS
 - ↳ Budget Margin
 - ↳ Budget Profit
 - ↳ Budget Sales
 - ↳ COGS
 - ↳ Margin
 - ↳ Marketing
 - ↳ Profit
 - ↳ Sales
 - ↳ Total Expenses

Profit, Sales and Total Margin by Region

Save as

Name: JCL Coffee Shop Report

Selected destination: My content

My content Team content

Name	Type	Last Modified
Coffee Shop Data Oct 2024.xlsx	Uploaded file	12/3/2025, 1:01 PM
JCL Coffee Shop Data	Data module	12/3/2025, 1:11 PM
JCL Coffee Shop Report	Report	12/3/2025, 2:02 PM

No properties

Select an object to see its properties

Cancel Save

	East	2106	2060	7341
South	1293	1095	4196	
West	3415	2530	11273	

4.10 Interact with a report

When a report runs in the interactive viewer, the report consumer and author both have options to personalize the report and see different data in the report by filtering, drilling up and down, and more.

Choose the options that best suit your needs for viewing frequency and personalization. If you want to see a report on a regular basis, subscribe to it. If it's important, you can set it as your home page.

Run the report in an HTML format. Click on the map and you will see an interactive option to filter data appears. Click on it and you will see the tree with all the data items underneath. Close this dialog.

The screenshot shows the IBM Cognos Analytics interface. At the top, there is a blue header bar with the text "IBM Cognos Analytics" and "New report". Below the header is a message banner: "Maintenance: The upgrade is now complete. Click on More Info to see what actions may be necessary and to subscribe to future events." To the right of the banner are buttons for "Dismiss" and "More info". The main content area has a title "Profit, Sales and Total Expenses by Month". On the left, there is a sidebar titled "IBM Cognos Analytics - Reporting" with a "Find" search bar and a tree view of data items: "data.region" (Profit, Sales), "data.point" (Total Expenses), and "data.latlong" (Month). A red arrow points to the "Month" node in the tree. In the center, there is a map of the United States and Canada with states and provinces highlighted in green. To the right of the map is a table titled "Sales Market by Month" with data for 2023:

Year	Month	Market	Total Expenses	Profit	Sales
2023	January	Central	2994	4604	11580
		East	2121	2653	7497
		South	1322	1554	4451
		West	3354	3668	11698
February	Summary	5726	8157	23535	
February	Central	4150	5050	14498	
		East	2051	2734	7374
		South	1279	1550	4348
		West	3227	3589	11280
March	Summary	10707	13723	41550	
March	Central	2866	4587	11255	
		East	2069	2678	7372
		South	1234	1477	4184
		West	3262	3617	11407
April	Summary	13107	17127	54234	
April	Central	2907	3172	10770	
		East	2090	2031	7213
		South	1277	1040	4065
		West	3381	2489	11092
May	Summary	12936	15276	51010	
May	Central	2936	3276	11010	
		East	2106	2060	7341

Now select Month from the List report and you will see many more interactive options such as filter, sort, summarize, grouping, drill etc. Click on Filter. Click on Create Custom Filter and a new filter dialog opens up. Select January, February, March. Click ok.

You will see the data on the list gets filtered for these 3 months.

Filter condition - Month

Available items

- Select all
- January
- February
- March
- April
- May
- June

Selected items

- Keep these values
- January
- February
- March

Sales Market by Month

	Central	East	South	West	Total Expenses
January	4604	11580	2994	2653	7497
Central	4604	11580	2994	2653	7497
East	2653	7497	2121		
South	1554	4451	1322		
West	3668	11698	3354		
January - Summary	12479	35226	9791		
February	5050	14498	4150	2734	7374
Central	5050	14498	4150	2734	7374
East	2734	7374	2051		
South	1550	4348	1279		
West	3589	11280	3227		
February - Summary	12923	37500	10707		
March	4587	11255	2866	2678	7372
Central	4587	11255	2866	2678	7372
East	2678	7372	2069		
South	1477	4184	1234		
West	3617	11407	3262		
March - Summary	12359	34218	9431		
April	3172	10770	2907	2031	7213
Central	3172	10770	2907	2031	7213
East	2031	7213	2090		
South	1040	4065	1277		
West	2489	11092	3381		
April - Summary	8732	33140	9655		
May	3276	11010	2936	2060	7341
Central	3276	11010	2936	2060	7341
East	2060	7341	2106		
South	1095	4196	1293		
West	2530	11273	3415		

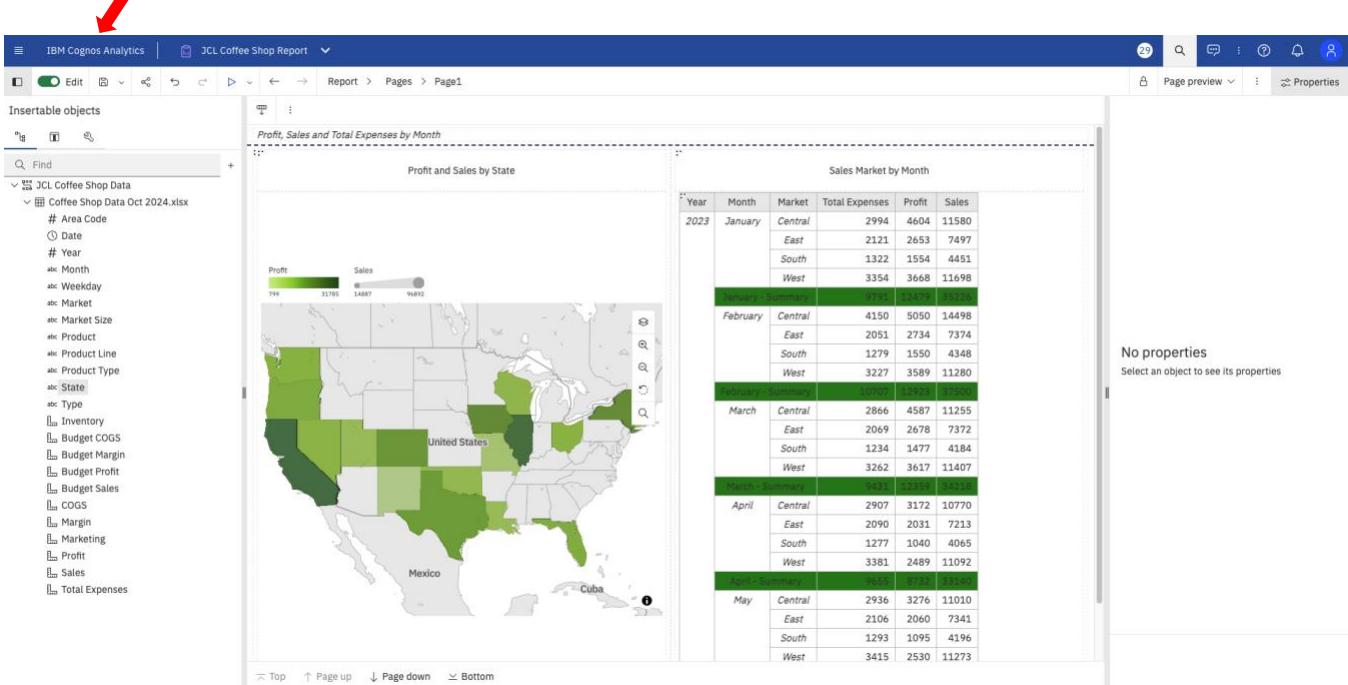
5 Distributing and interacting with a report

5.1 Sharing/distributing a report

If an administrator connects Cognos Analytics to Slack or Microsoft Teams, or enables email sharing, you can send Cognos report to other users. You can also share your Cognos report via URL links and embedded html in web pages. The report author can share content from within the reporting canvas or from the Team content folder.

Let's share the content with a user from the Team folder.

First, you need to navigate to the Team content folder by clicking on IBM Cognos Analytics to return to the home page.



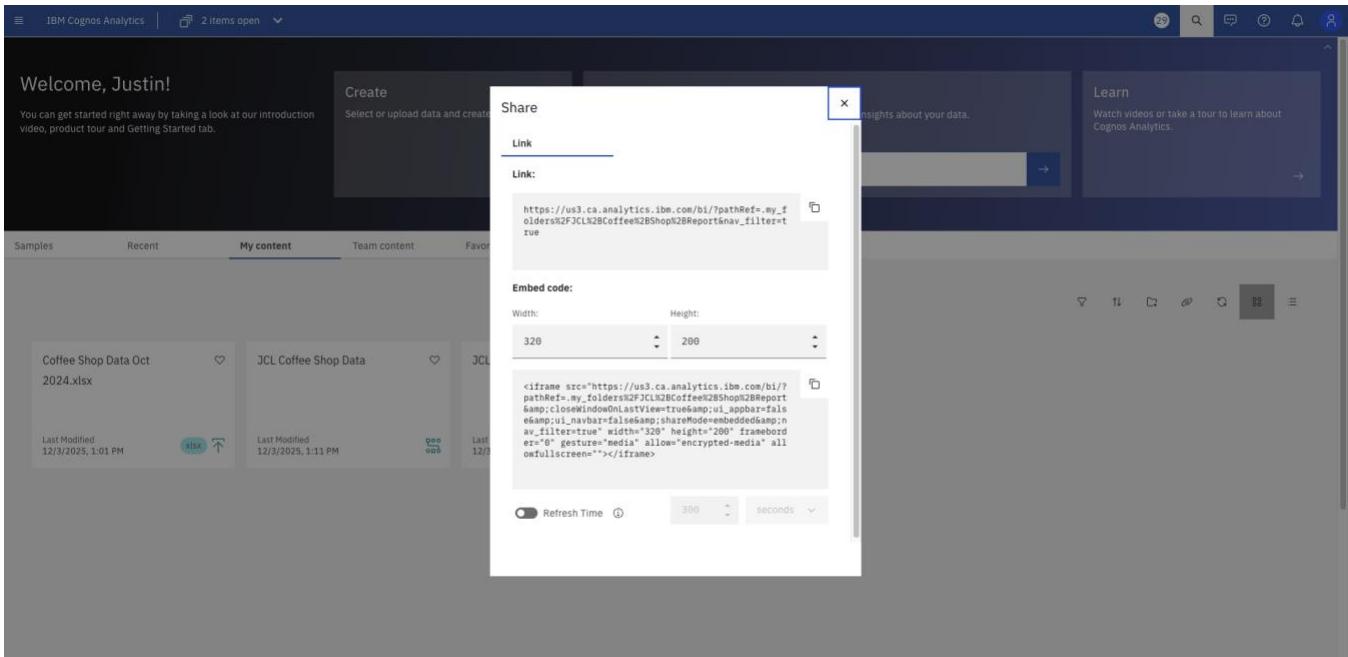
Now click on Actions menu (three dots) on the report tile you just saved. Click Share. You will see Link tab. You have an option of copying this link and share with anyone with access to Cognos Analytics. Optionally you can share report directly in an email, but due to the limitation of the trial environment you will only see the shareable link option for now. You can also note the Embed code which allows you to embed the report on a website of your choosing and the selection of a refresh time to see how often you wish for the report to refresh.

TechXchange

Team content

Coffee Shop Data Oct 2024.xlsx

Run as
Edit report
Create report view
View versions
Share
Copy or move to
Add shortcut
Edit name and description
Add to favorites
Properties
Details
Delete



5.2 Scheduling a report

The report can be scheduled to run it later or at a recurring date and time. The schedule can be created for individual reports or use jobs to schedule multiple reports at once. Jobs have their own schedules independent from the individual entries schedule. This feature is highly desirable for all our consumers. For example, a business executive prefers to see a monthly sales summary in their inbox first day of each month.

Let's create a schedule to have a report delivered to an executive, 1st of every month at 5:15 am in both HTML and Excel formats.

To do so, click on Actions menu (three dots) on the report tile you just saved. Click Properties. You will see General tab. Click on Schedule tab. Click on Create schedule button. Make the selections highlighted in the screenshot. Click Save.

Coffee Shop Report SS

Schedule Options Prompts

Frequency

Type: Monthly

Repeat every: 1 month

Schedule by: Day of the month

Day: 1st

Period

Start: 2024-09-01 5:15 AM

No end date

Advanced

Schedule

Run every 1 month(s) on the 1st from September 1, 2024 at 5:15 AM.

Credentials

Shaveta Srivastava (85308e016c79)
Shaveta.Srivastava@ca.ibm.com

Priority

3

Format

HTML, Excel

Delivery

Save

Languages

English (Canada)

[Reset default options](#)

Save Cancel

Coffee Shop Report SS

Schedule Options Prompts

Find

Format

Use default format

HTML [Edit options](#)

Excel Data

PDF

CSV

Excel

XML

Accessibility

Enable accessibility support

Delivery

Save

Save report

Save as a report view

Send report by email

1 recipient [Edit details](#)

Schedule

Run every 1 month(s) on the 1st from September 1, 2024 at 5:15 AM.

Credentials

Shaveta Srivastava (85308e016c79)
Shaveta.Srivastava@ca.ibm.com

Priority

3

Format

HTML, Excel

Delivery

Save, Email

Languages

English (Canada)

[Reset default options](#)

Save Cancel

Coffee Shop Report SS

The screenshot shows the Cognos Reporting interface for a report named "Coffee Shop Report SS". The "Options" tab is selected. On the left, there's a message editor with a recipient list ("Shaveta Srivastava (85308e016c79)"), subject ("A new version of Coffee Shop Report SS is available"), and a message body ("This is a monthly Coffee Sales Summary report. Please review to see how the coffee business is doing for our organization."). Below the message editor is a rich text toolbar. To the right, there are several configuration sections: "Schedule" (Run every 1 month(s) on the 1st from September 1, 2024 at 5:15 AM), "Credentials" (Shaveta Srivastava (85308e016c79), Shaveta.Srivastava@ca.ibm.com), "Priority" (3), "Format" (HTML, Excel), "Delivery" (Save, Email), and "Languages" (English (Canada)). A "Reset default options" button is also present.

Click Cancel to ensure we do not actually send the report but these are the steps you would take in order to send the report out. Congratulations on completing this lab!

6 Getting help and troubleshooting

Congrats! If you made it this far, you have explored some capabilities of Cognos Reporting. We welcome you to try some advanced features in Cognos reporting as well. Some of the features that set us apart from our customers are bursting and allowing creation of custom applications. There are some links below that provide next steps in your journey of exploring Cognos Reporting. This section also provides information about getting help with your lab and some common troubleshooting topics.

6.1 Common troubleshooting tips

To further understand how to leverage modern capabilities to perform equivalent Query Studio tasks in Reporting, please refer to the [Feature comparison documents](#)

[Bulk conversion documentation](#) is also available for the customers to learn more about automatically converting Query Studio assets into Reporting assets.

6.2 Getting help

Cognos Analytics [101 support content hub](#) is available for product knowledge and documentation.

To get answers to your questions about the product, sales, support, please contact support [here](#).

6.3 Additional Resources

Check out these resources for more information about Cognos Analytics:

- Cognos Analytics [YouTube playlist](#) on the IBM Support channel
- Cognos Analytics [case studies](#)
- If you'd like to explore Cognos Analytics Cloud offering, you can sign up for Cognos Analytics [30-day trial](#)

Thank you for your interest and for taking the time to learn about moving Query Studio assets into Cognos Reporting.