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Getting started with Watson Analytics

IBM

Note

Before using this information and the product it supports, read the information in "Notices" on page 35.

Product Information

This document applies to and may also apply to subsequent releases.

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Chapter 1. What is Watson Analytics?

We all ask questions about our data every day.

Some of our questions are about a status or situation. What is the revenue by country in Europe? What is the trend of my product costs in the United States? What is the breakdown of revenue by country and product line? Some of our questions are about why something happened. Why did certain sales deals close while others did not? Why do some customers leave?

Asking questions and exploring your data is what IBM® Watson Analytics™ is all about.

When you discover new insights about your organization, you want to share them with other people in your organization. You can quickly and easily create beautiful dashboards and infographics.

In short, when it comes to data, we want to know what is happening, why it is happening, and what insights need to be communicated with others.

Watson Analytics can help you understand your data better and find insights that are hidden in your data. You can get answers and new insights to make confident decisions in minutes – all on your own.

Scenario for the tutorial

In this tutorial, you're a Human Resources manager who has been given a big project – you'll be leading a new training initiative for your entire global company. You want to better understand where the training budget is currently invested in all areas of the company because at this moment, you just know how it's spent in your area of the company.

We know your time is valuable. We created this tutorial to guide you through some basic concepts and features using a sample data asset so that you can quickly learn more about Watson Analytics and its innovative way of bringing you closer to your data. Then you can add your own data and start discovering new insights in your business.

Something to note before you start: the screen captures in this tutorial show the Professional edition of Watson Analytics in the Google Chrome browser. If you use a different browser or a different edition of Watson Analytics, the product may look a little different.

Accessibility features and the tutorial

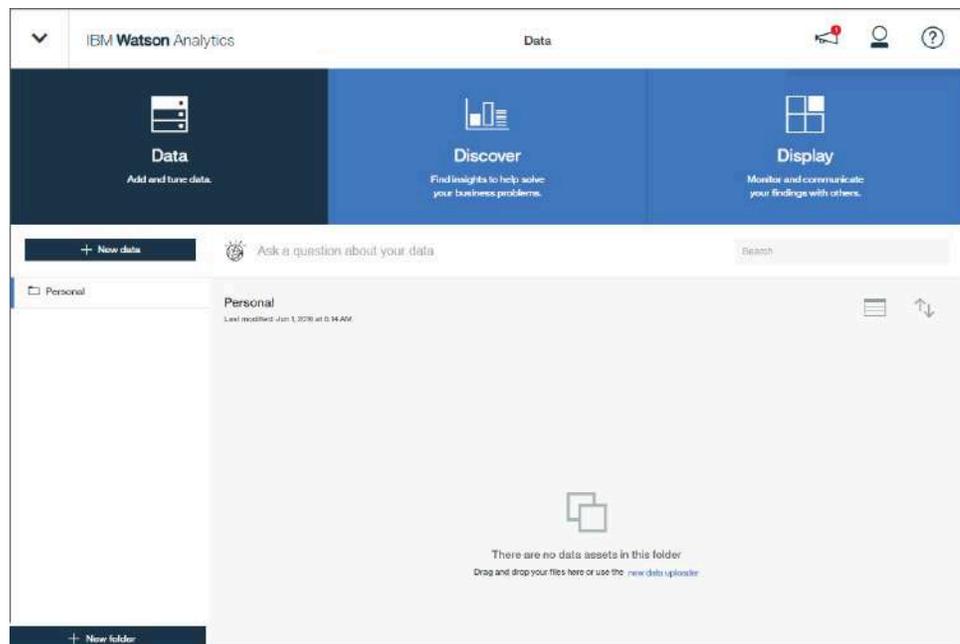
Watson Analytics HTML documentation has accessibility features. Go to IBM Knowledge Center (<https://www.ibm.com/support/knowledgecenter/SS4QC9/com.ibm.solutions.wa.doc/welcome.html>) for the accessible version of the documentation. PDF documents are supplemental and, as such, include no added accessibility features.

Chapter 2. Uploading data

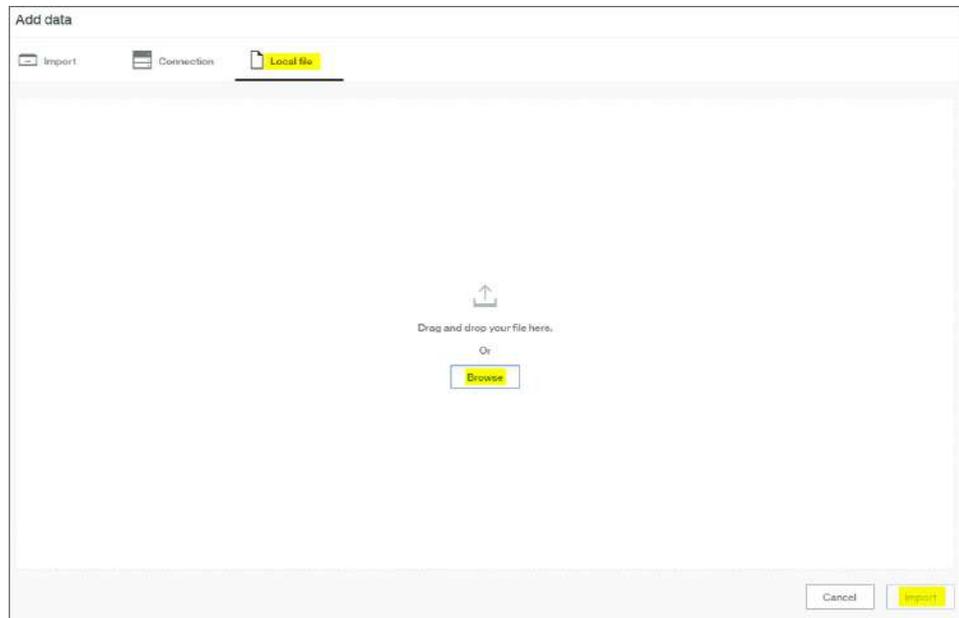
Let's start by getting data for the tutorial. There are lots of sample data assets on the IBM Watson Analytics Community, including the one that's used in this tutorial.

Procedure

1. Go to Human Resources Training on the Watson Analytics Resources page. (<https://www.ibm.com/communities/analytics/watson-analytics-blog/human-resources-training/>)
2. Select “IBM_HR_Training 2014-17.csv”. Depending on your browser, you may be asked what you want to do with it. Tap **Save**.
3. In Watson Analytics, tap **New data**.



4. Tap **Local file** and browse to where you saved “IBM_HR_Training 2014-17.csv”.



5. Tap the **Import** button.

While uploading the file, Watson Analytics analyzes the data and metadata, creates hierarchies from the metadata, and identifies concepts to use in analyses.

The data asset appears as a tile in the **Data** landing page and you're ready to get to work.



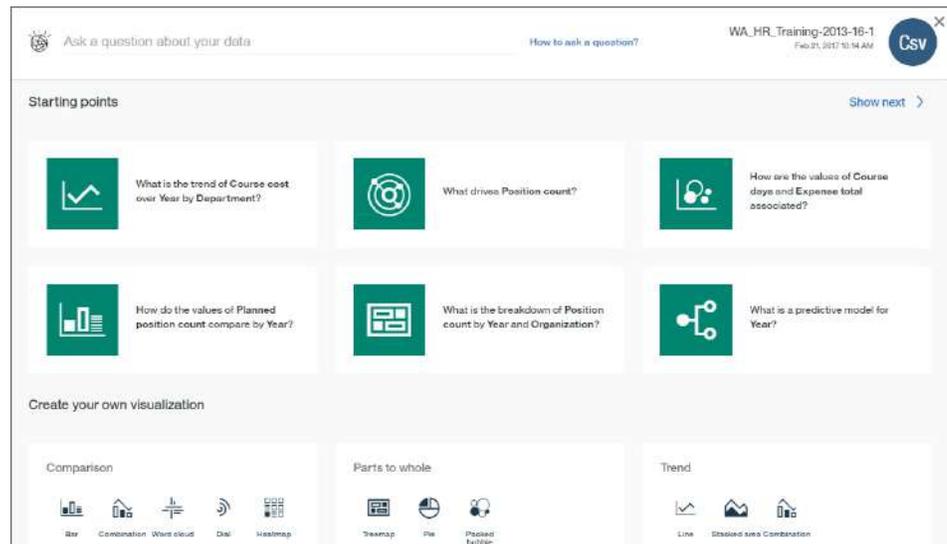
6. You can refine the data by filtering it or adding calculations or changing the properties. But we won't refine it in this tutorial. To learn about refining your data, see [Refining data assets](#).

Chapter 3. Asking questions and discovering insights

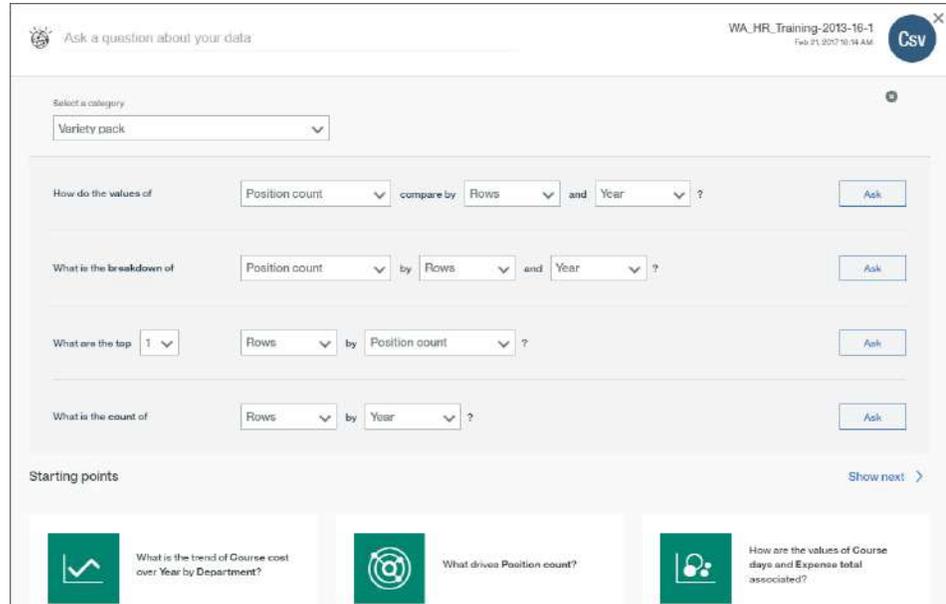
Now that you've added sample data, let's start discovering new insights in the data.

Procedure

1. On the **Data** landing page, tap the “WA_HR_Training 2013-16-1” tile. You can ask a question, select a starting point that we created for you after analyzing your data, or create a visualization on your own. Let's ask a question.

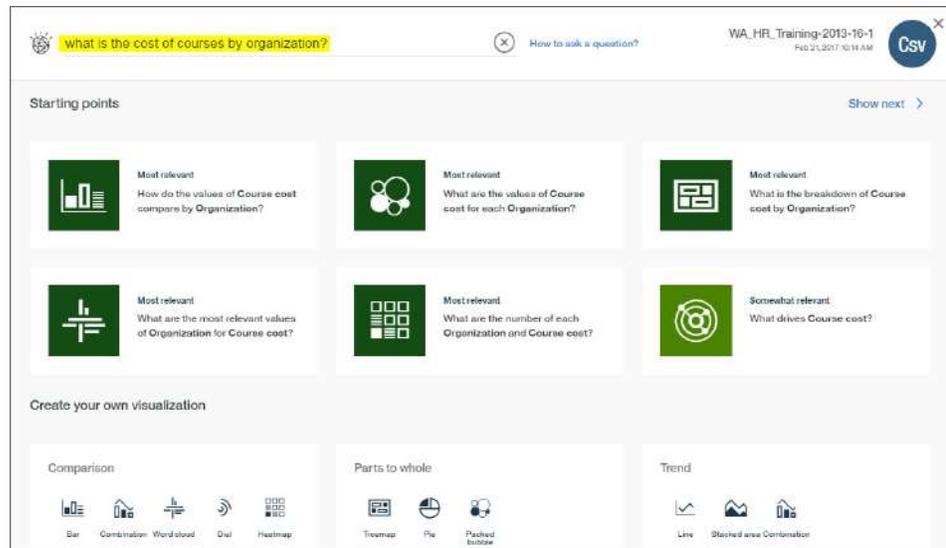


2. If you're wondering how to ask a question, there's a coach to help you. Tap **How to ask a question**. You see categories of questions. Take some time to look through the questions in each category. If you select one of the questions, you'll see a new set of starting points.



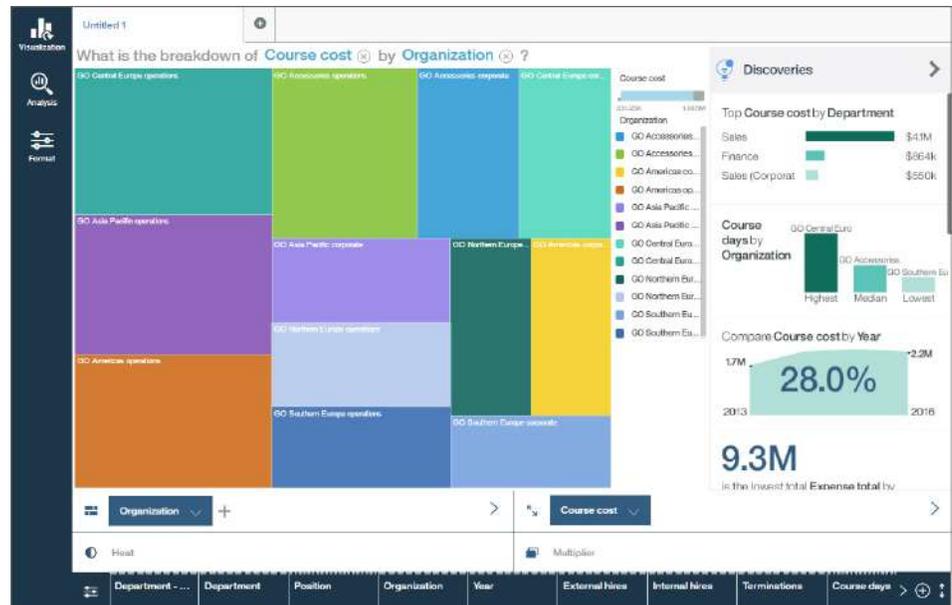
- But for the tutorial, tap the **Close** icon  to return to previous page where we will ask the question “what is the cost of courses by organization?” Press Enter.

The question provides a context for the starting points so now the new starting points are marked as most relevant or somewhat relevant. Starting points are sorted by relevancy starting with the most relevant.



- Select the “What is the breakdown of Course cost by Organization?” starting point.

Take a look at the visualization, which is a tree map. The size of each box in the tree map tells you the amount of training spent by each organization.



5. You can easily get more details about the data that a part of a visualization represents. Let's look at the numbers for one of the largest boxes. Touch and hold, or hover over, "GO Central Europe operations".



Before going further, take a look at the **Discoveries** panel.



Without you having to do a thing, IBM Watson Analytics identifies patterns and associations in your data and automatically creates other starting points for you to explore. As you change the data in the visualization, you'll see new starting points that reflect the changes you make. Because Watson Analytics is constantly improving the smarts that create these starting points, you might not see the same discoveries that are shown in the tutorial.

You'll get to use the **Discoveries** panel later in the tutorial.

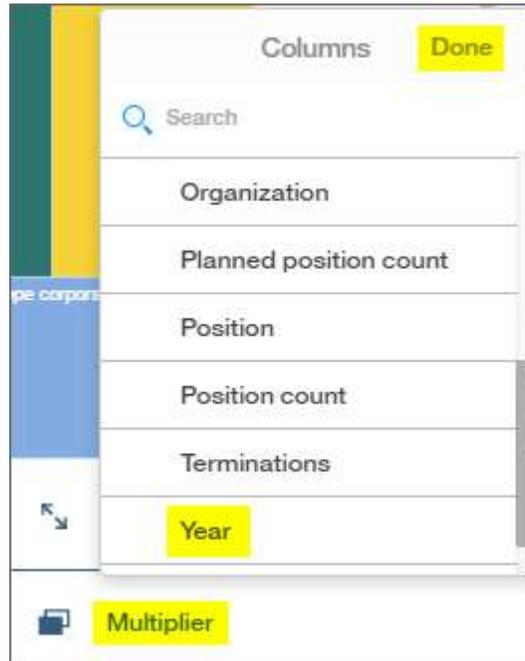
- This visualization shows you data for all years but let's find out how costs have evolved over time. The data slots at the bottom of the window show where you can add data.



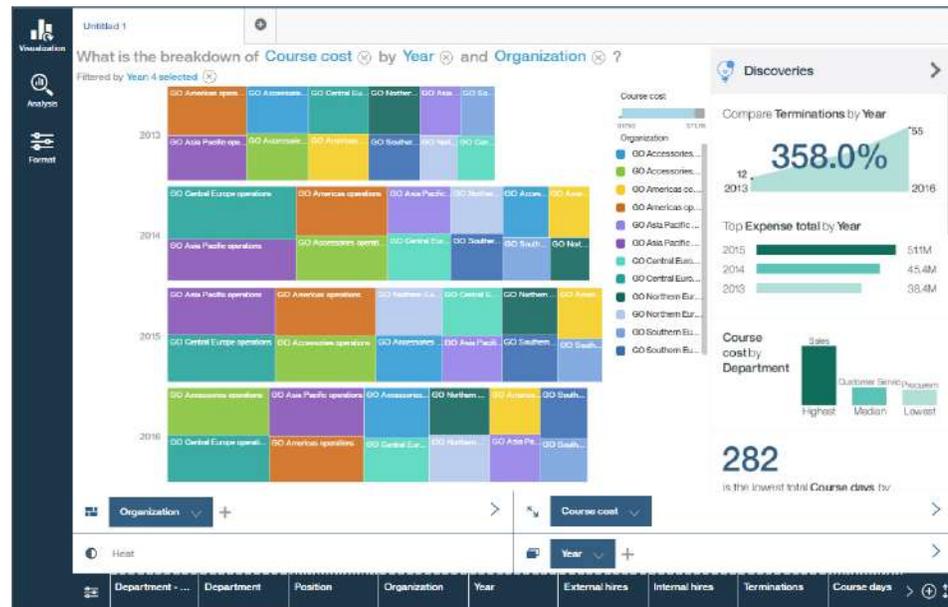
Complete the following actions:

- Tap the **Multiplier** data slot.

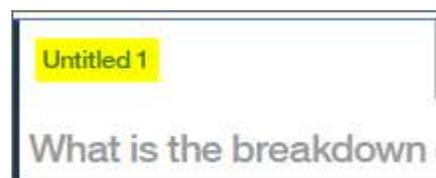
- b. Scroll down and tap **Year**.
- c. Tap **Done**.



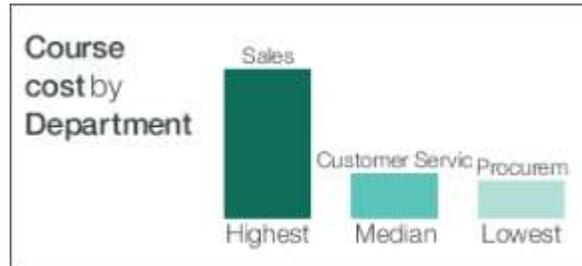
You see the cost for courses by year.



- 7. Double-click the "Untitled 1" tab above the visualization and change it to "Course cost".



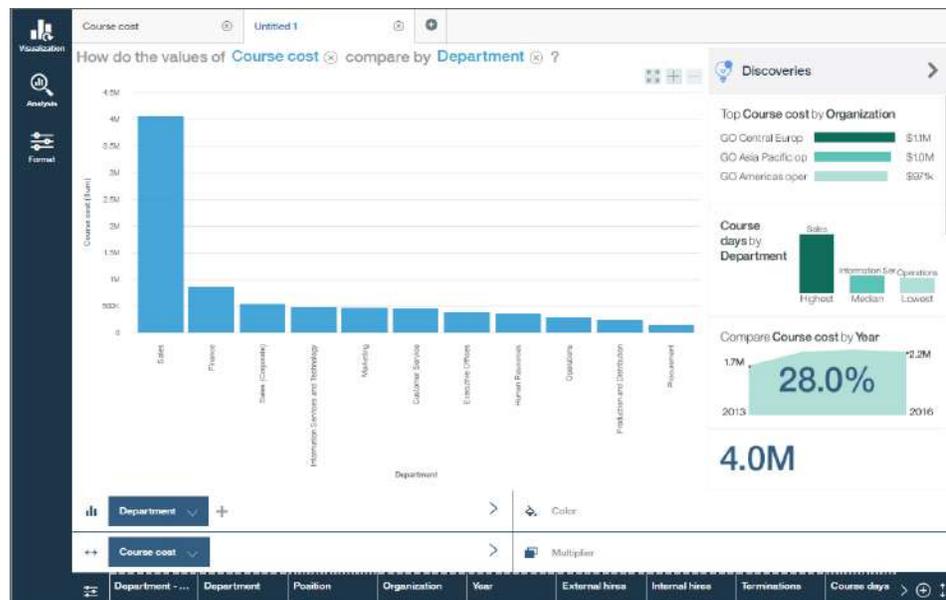
- To explore the data from other perspectives, let's add one of the starting points from the **Discoveries** panel now. Tap "Course cost by Department".



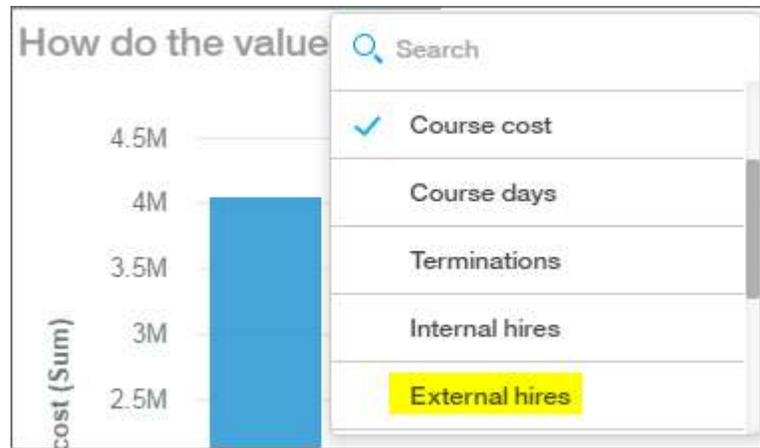
Improvements are constantly being made to the smarts that create the starting points and you might not see this discovery in the panel. If this has happened, complete these actions:

- Tap next to the "Course cost" tab.
- Enter the question "how do the values of course cost compare by department?"
- Select the starting point with the same name.

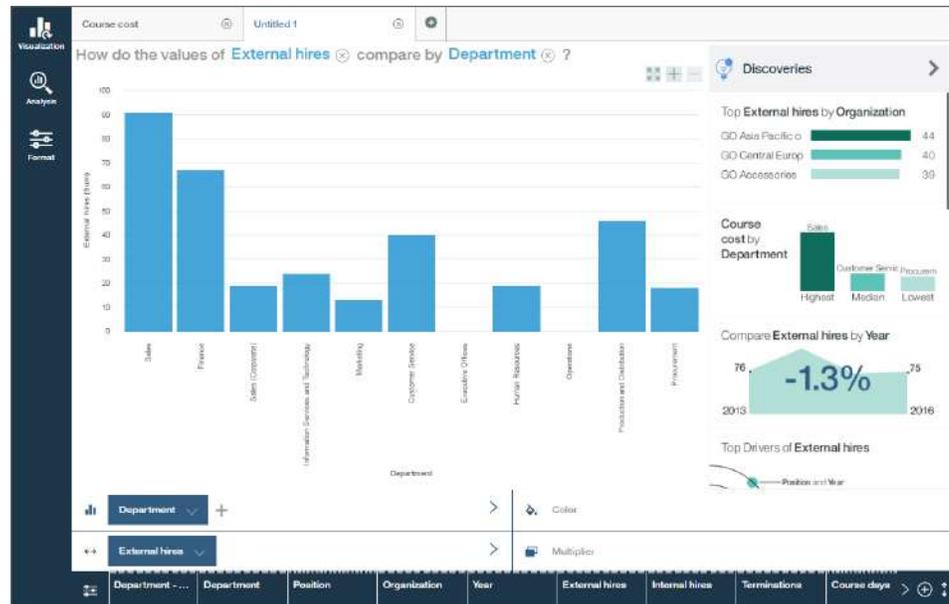
On a new tab, you see course costs by department.



- Let's find out how many new hires are planned for each department. Tap **Course cost** in the interactive title for the visualization. Tap **External hires**. When you tap the blue text in the title, you see the most relevant columns first but you can select any column.



You see that the Sales departments hire the most external people followed by the Finance departments.

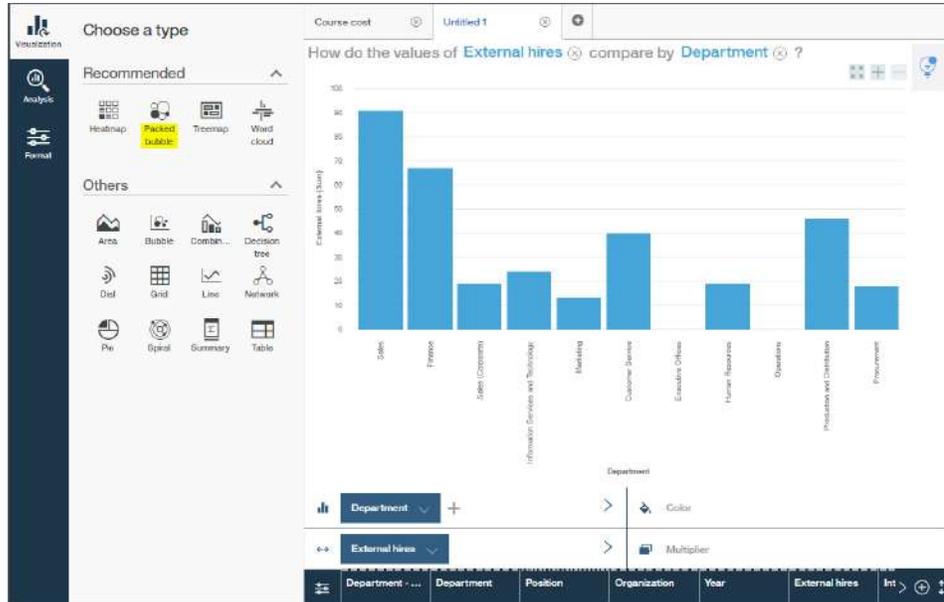


- Let's use a different visualization type for this discovery. Tap the **Visualization types** icon and select **Packed bubble**.

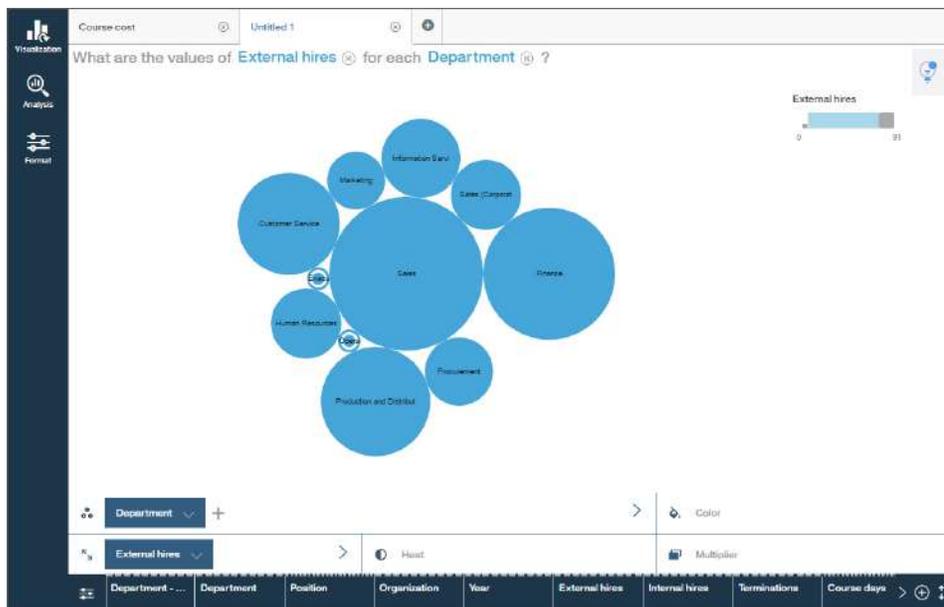


Notice how the **Discoveries** panel is automatically closed. To reopen it, tap the **Discoveries** icon.





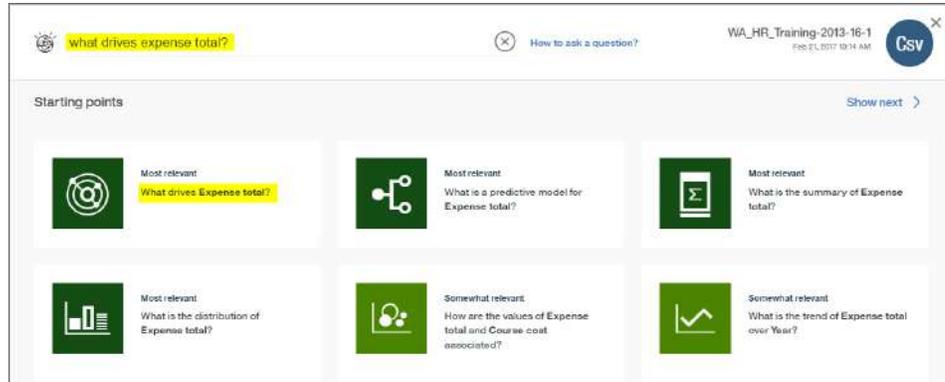
- Close the **Visualization** side panel and change the “Untitled 1” tab to “External hires”.



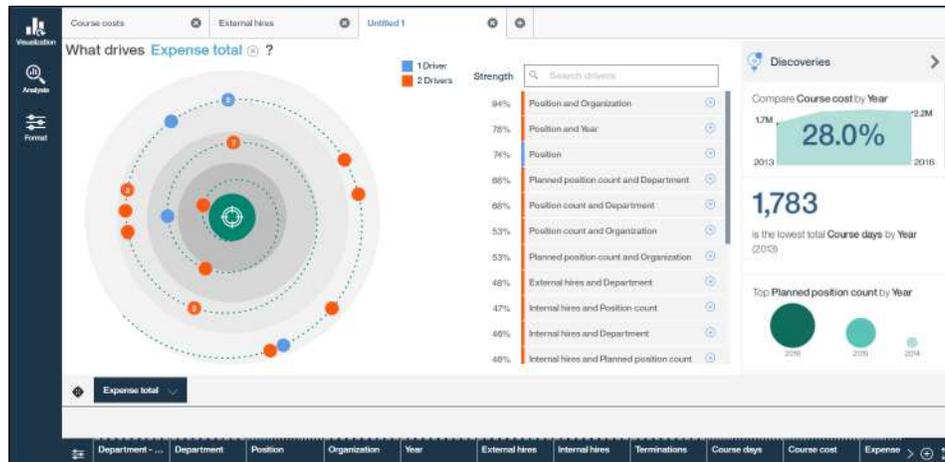
- We have info about costs and hiring. Now let's see what is driving expenses. To create a different starting point, tap the **Add tab** icon  next to the “External hires” tab.



- Ask the question “What drives expense total” and then select the starting point with the same name.



Watson Analytics applies statistical algorithms to the data to discover insights, patterns, and correlations in the data. The spiral visualization shows you the key drivers for the target, Expense total. The closer the driver is to the center, the stronger it is.



- To have more room for the visualization, tap the **Discoveries** icon to hide the **Discoveries** panel.

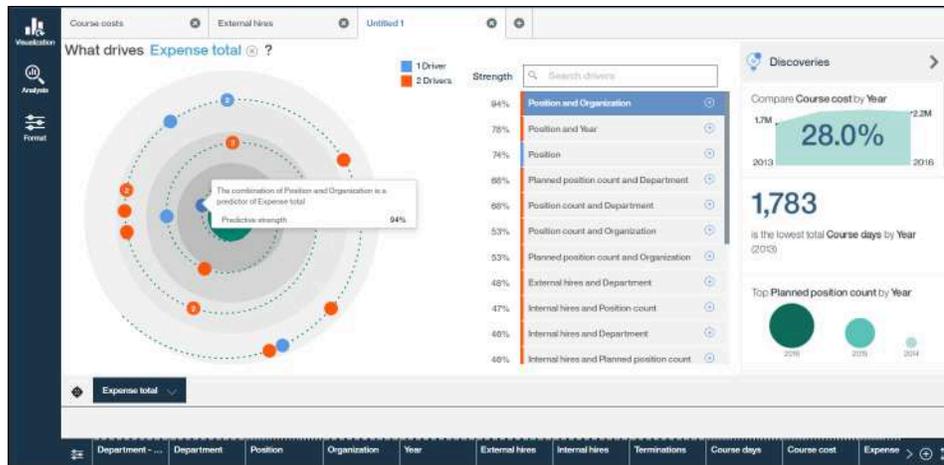


Then change the tab name to “Expense total”.

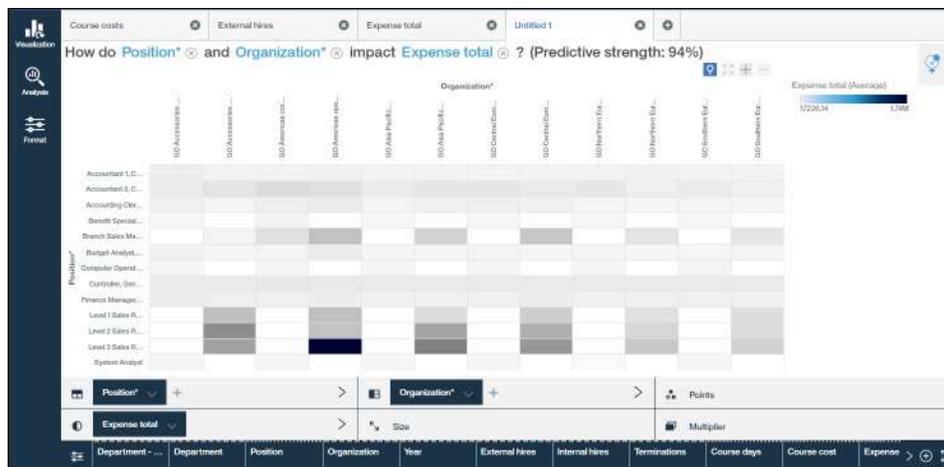


- Tap, or hover over, a dot in the spiral visualization to see which driver is highlighted in the **Drivers** list.

You see the predictive strength of each driver. Predictive strength measures how accurately a driver predicts a target. A driver of 100% perfectly predicts a target. In this case, the combination of Position and Organization impacts Expense total with 94% accuracy.



16. To add the detailed visualization for the **Position and Organization** driver, tap the **Add detailed visualization** icon next to it. 
- You see a new tab that contains information about how position and organization affect the target, Expense total.
17. To have more room for the visualization, hide the **Discoveries** panel.



18. Change the "Untitled 1" tab to "Drivers".
19. Save the discovery set in the **Personal** folder and name it "Tutorial - discoveries".
20. Return to the landing page.

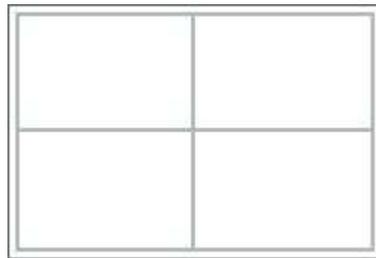


Chapter 4. Creating a display to share with others

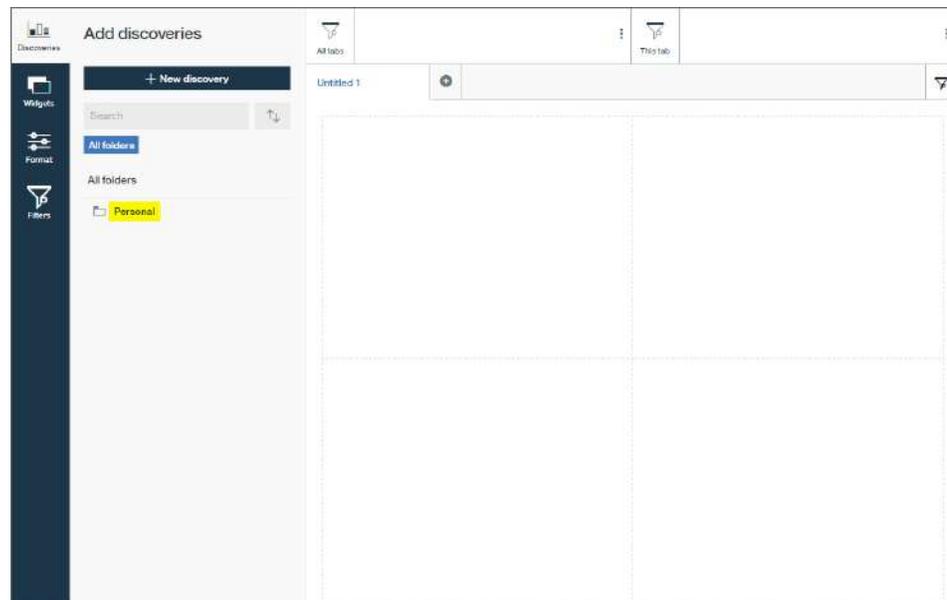
You can easily communicate the analysis and insights that you discover in IBM Watson Analytics by combining visualizations with text, images, and shapes. Create a dashboard, infographic, or Expert Storybook where you can monitor and share these insights. In this tutorial, let's create a dashboard.

Procedure

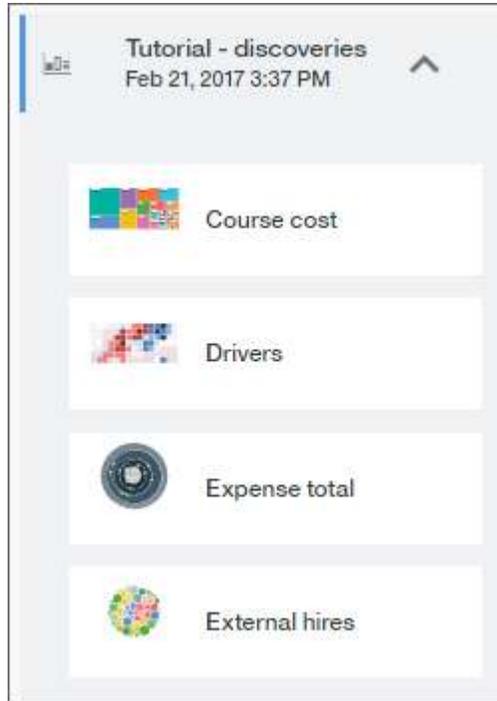
1. On the landing page, tap **Display** and then tap **New display**.
2. Complete the following actions:
 - a. Name the display "Tutorial - dashboard".
 - b. Ensure that the **Dashboard** display type is selected.
 - c. Tap **Create**.
3. You see predefined layouts that contain grid lines for easy arrangement and alignment of visualizations and other elements in a display. Let's select the layout that has 4 panes for our dashboard.



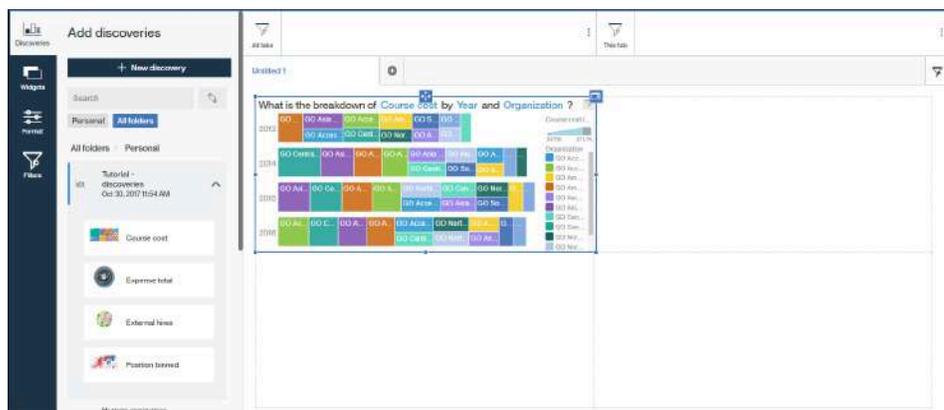
4. Let's add the discoveries that you created in **Discover**. Open the **Personal** folder to see your discovery set.



5. Expand "Tutorial - discoveries".

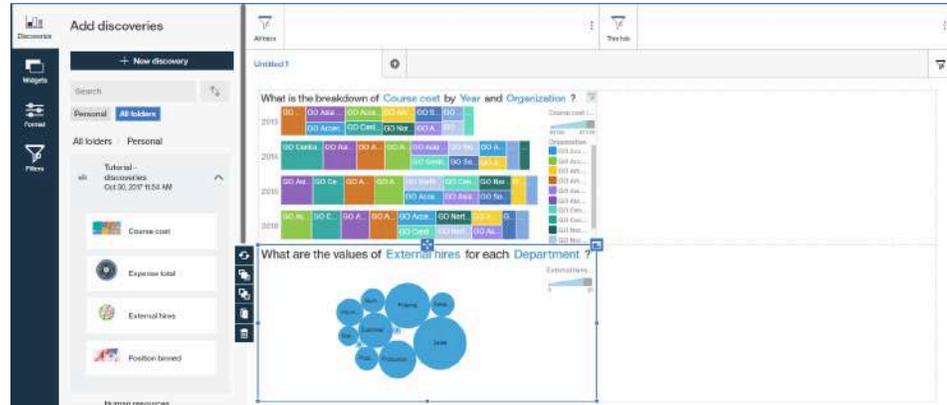


6. Drag “Course cost” to the top left pane and drop it on the square that appears in the pane.

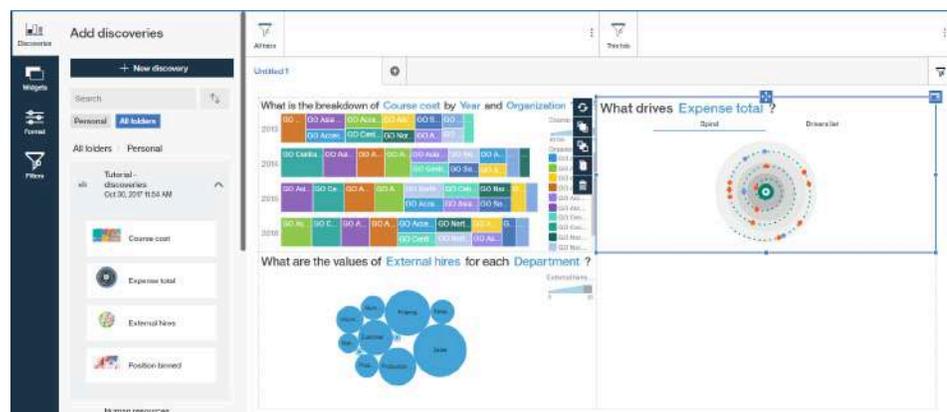


You can change the data that's shown in the discovery if you need to. Simply tap the discovery and then tap . For example, you can use the interactive title, change the columns in the data slots, or change the visualization type.

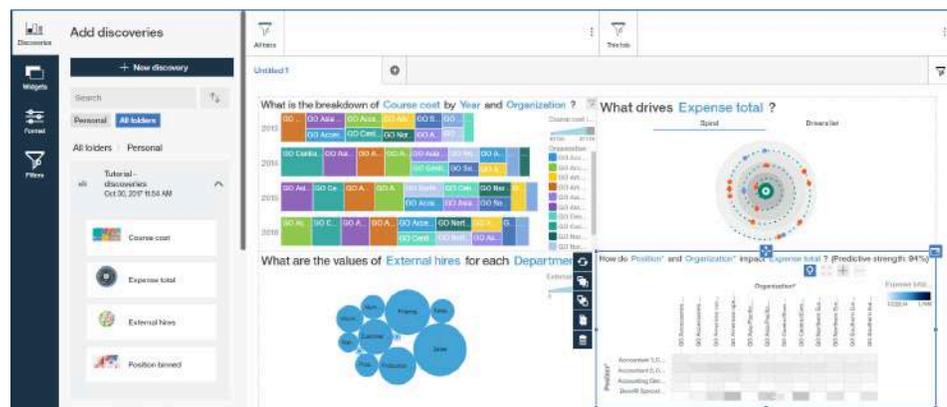
7. Add “External hires” to the bottom left pane.



8. Add "Expense total" to the top right pane.

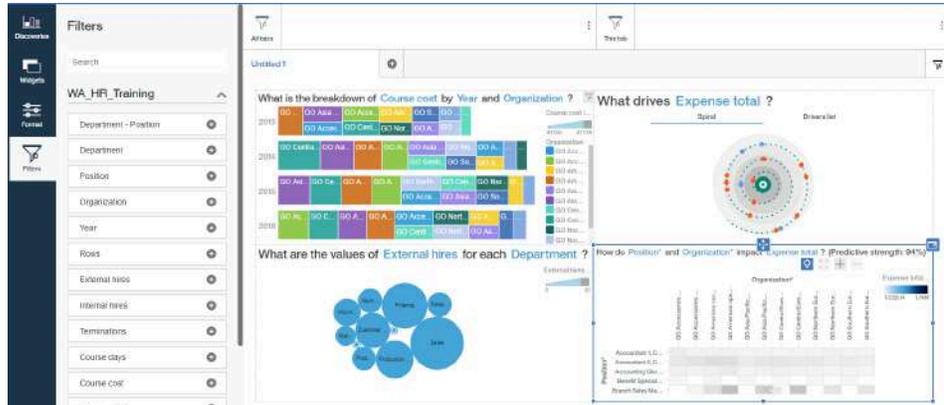


9. Add "Drivers" to the bottom right pane.



10. Let's add a filter to the current tab of the display to see the impact of the duration of courses on the visualizations. Tap the **Filters** icon.





- Tap  next to **Course days** to add it to the **This tab** filter area. Close the **Filters** panel to have more room on the canvas.



- To apply the filter, tap **Course days** in the **This tab** filter area. Move the slider to show courses with a shorter duration, or type a new end point. We picked 14.5 as the end point but feel free to select a different one. As you move the slider, the visualizations change to reflect the filter.



- To close the filter box, tap **Course days** again. Info about what is filtered is shown in the **This tab** filter area and under the title for each visualization.



14. Save the dashboard to your **Personal** folder.
15. To find out how to enhance the dashboard, visit the **Docs** in the **Help** menu. Here are some ideas:
 - Add tabs to the display for additional discoveries.
 - Use text widgets to annotate the dashboard with descriptions or to add a title.
 - Provide more info by adding media and links to web pages.
 - Format the dashboard, such as changing the colors or theme.
 - Add images and shapes to add visual appeal.
16. Tap the **Share** icon  to share this dashboard. If you are using the Professional edition of Watson Analytics, you can also move it to a shared folder where other users in the account can use it.
17. Return to the landing page.



Chapter 5. Social media

You can gain insight into social media discussions that are related to your key focus for analysis.

You can mine social media in different ways in IBM Watson Analytics:

- You can add a snapshot of Tweets and their metadata as a data asset to explore in Watson Analytics if you are subscribed to the Professional edition or the Plus edition.
- You can purchase IBM Watson Analytics for Social Media and use it to analyze social media content in visualizations that we create for you.

Adding and exploring Tweets

As you continue to develop your company's pilot program, you are asked to analyze external social media data and identify positive ways to deliver this training. You decide to use hashtags about e-learning and mobile learning.

About this task

You can complete this task only if you are subscribed to the Professional edition or the Plus edition of Watson Analytics.

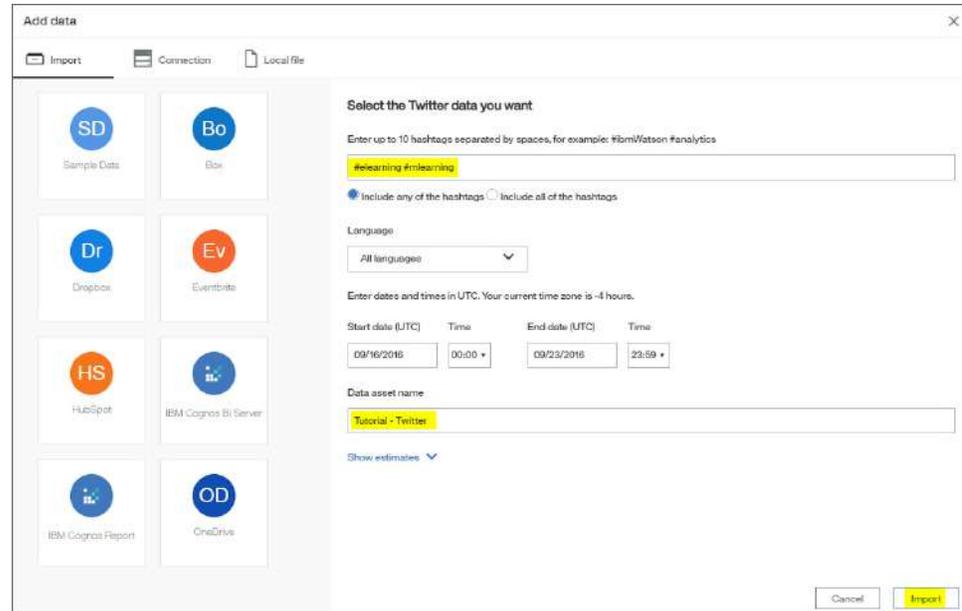
Procedure

1. On the landing page, tap **Data** and then tap **New data**.
2. On the **Import** tab, tap **Twitter**.

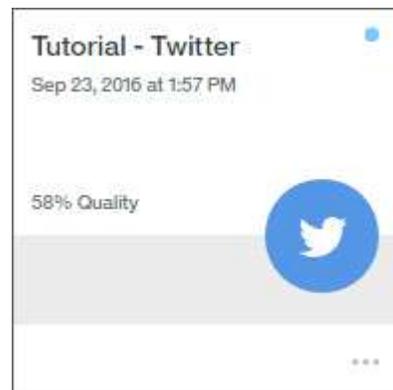
The screenshot shows the 'Add data' dialog in IBM Watson Analytics. The 'Import' tab is selected, and the 'Twitter' data source is chosen. The configuration options on the right include a text input for hashtags, a radio button for 'Include any of the hashtags', a language dropdown set to 'All languages', date and time pickers for 'Start date' (07/03/2017 00:00) and 'End date' (07/10/2017 23:59), a 'Data asset name' field with a yellow highlight and the text '200 characters limit', and a 'Show estimates' dropdown menu. 'Cancel' and 'Import' buttons are at the bottom right.

3. Complete the following actions:
 - a. Enter these hashtags and separate them by a space: #elearning #mlearning

- b. To get a reasonable and current sample size and quick return on the query, enter a date range that starts a week before today. Or use the date ranges that are shown in the screen capture.
- c. In the **Data asset name** box, highlight the default name and replace it with “Tutorial - Twitter”.

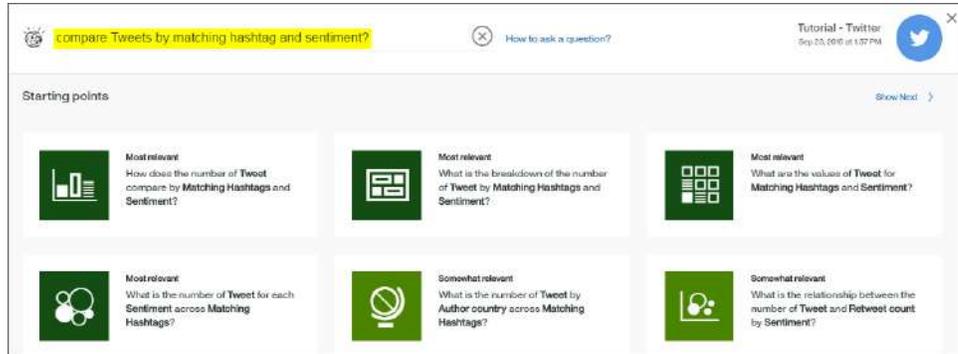


4. Tap **Import**.
5. Tap the data asset that was created.

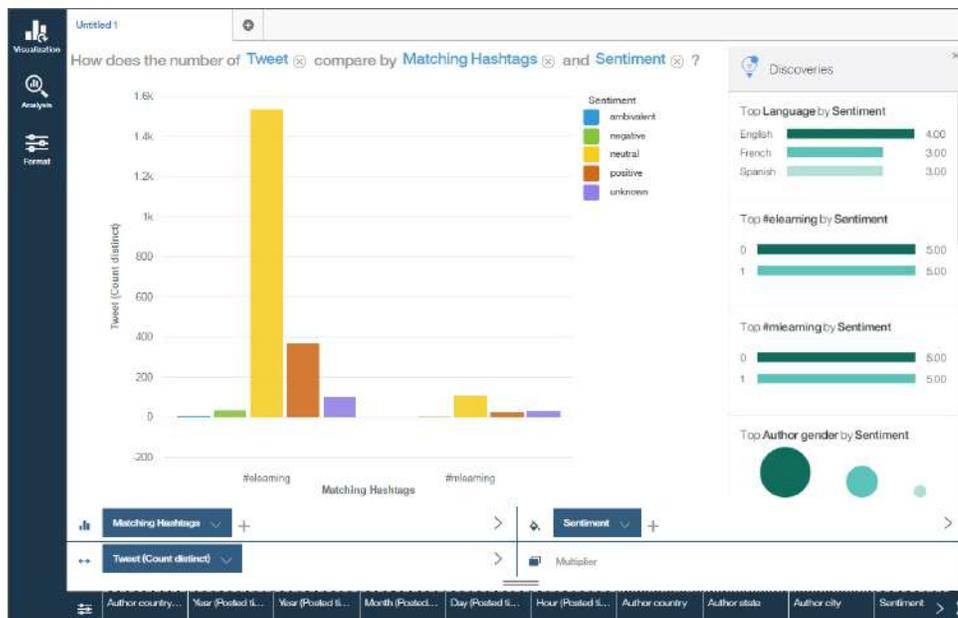


IBM Watson Analytics analyzes sentiment and generates some starting points for you.

6. Enter the question “compare Tweets by matching hashtag and sentiment?” Then, press Enter.



- Tap the starting point that is called “How does the number of Tweet compare by Matching Hashtags and Sentiment?”
You see that there is a lot more discussion around e-learning.



- Return to the landing page.



Results

You created a data asset of hashtags that you then explored in Watson Analytics.

Analyzing social media topics and trends

You've explored some hashtags and now you want to dive deeper into an analysis of what's being posted about some of the major ways to deliver training.

About this task

IBM Watson Analytics for Social Media helps your organization answer the following types of questions:

- What do consumers say and hear about my brand?
- What are the most talked about product attributes in my product category?
- Is the feedback good or bad?
- What is the competition doing to excite the market?
- Is my employer's reputation affecting my ability to recruit top talent?
- What are the reputations of the new vendors that I am considering?
- What issues are most important for my constituency?

In this tutorial, we'll mine social media posts to get a broader and deeper analysis of what is being shared about e-learning and mobile learning.

Procedure

1. Tap the arrow at the far left on the app bar.



2. Tap **IBM Watson Analytics for Social Media**.



3. Tap **New project**.
4. On the **Create** tab, name the project "Tutorial - Social Media" and tap **Next**.

Create a new social media project

Create Import

Type project name here

Your current subscription level has a data set document limit of 10 million and a monthly document limit of 5 million.

Cancel **Next**

5. You are in the **Topics** area where you specify the keywords that you want to search for. In the **Enter a topic** box, enter “#elearning” and tap  . This is one of the hashtags that you retrieved from Twitter in “Adding and exploring Tweets” on page 21.

Topics 1 Topic Themes None Dates 08/26/2016 - 09/26/2016 Languages 6 Selected Sources 7 Sources

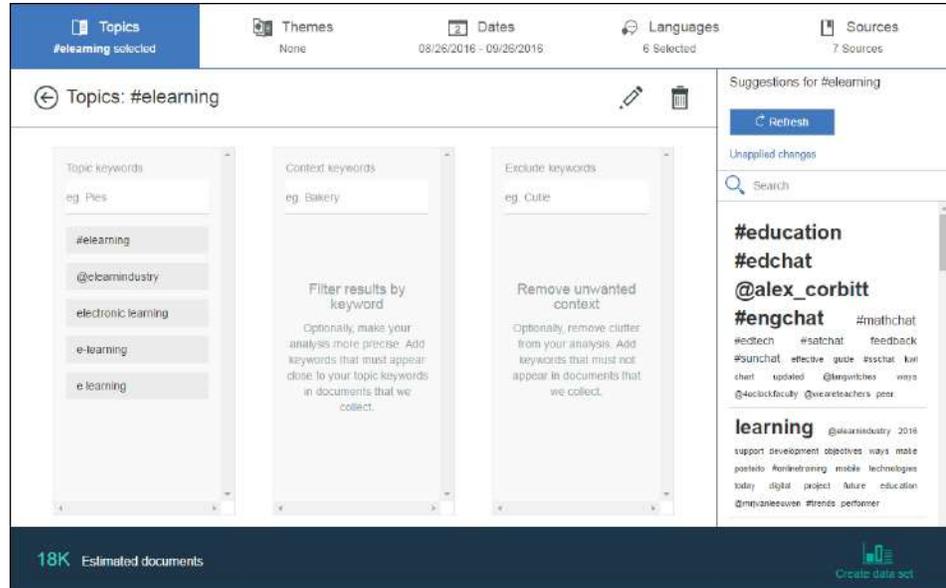
Enter a topic: Search my topics

#elearning

Topic keywords: Add

8K Estimated documents Create data set

6. Let's add synonyms to the topic. Tap “#elearning” and enter the following keywords one at a time in **Topic keywords**:
- @elearnindustry
 - electronic learning
 - e-learning
 - e learning

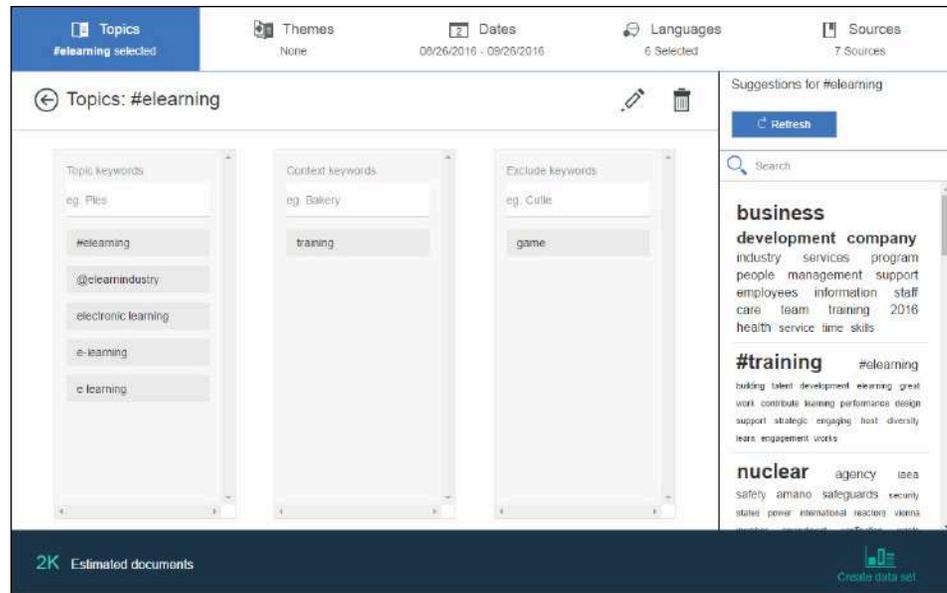


Here's some info about keywords:

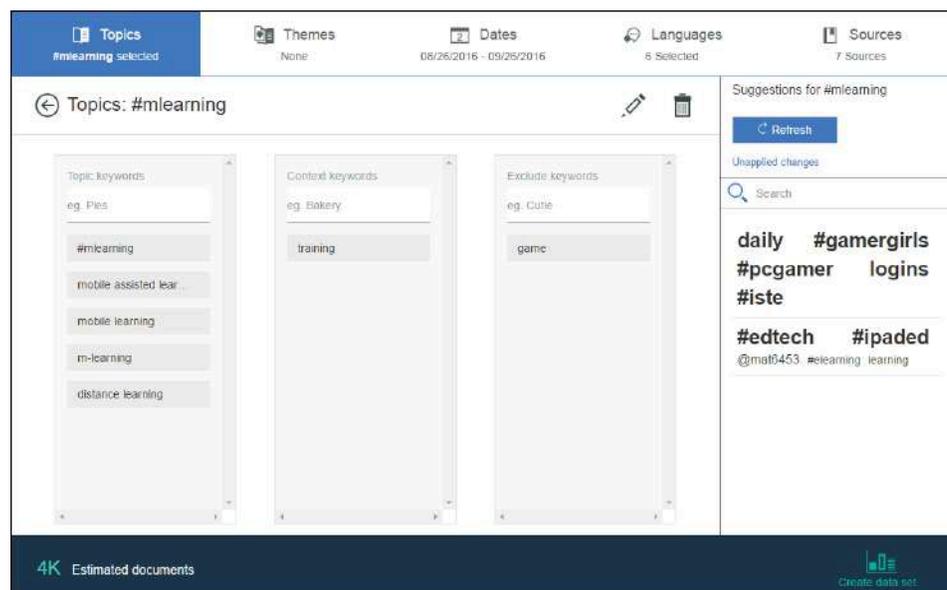
- Keywords are not case-sensitive. For example, the keyword “electronic learning” also retrieves the keyword “Electronic learning”.
- Words in documents that start with “@” or “#” are matched to keywords that you specify that don't start with those characters. For example, if you specify “elearnindustry”, “@elearnindustry” and “#elearnindustry” are also retrieved. However, the reverse is not true. If you specify “#elearnindustry”, “elearnindustry” and “@elearnindustry” aren't retrieved.
- Accented characters in keywords also match similar non-accented characters in documents. For example, “á” in a keyword matches “a” in a document.
- Non-accented characters in keywords aren't matched with accented characters in documents. For example, “a” in a keyword doesn't match “á” in a document.
- Diacritics in keywords also match their phonetic equivalents in documents. For example, “ä” and “ö” match “ae” and “oe” respectively.

As you enter keywords, Watson Analytics for Social Media captures keywords and related words in a sample of documents from these keywords. You can use the suggestions as **Context keywords** and **Exclude keywords**. You might see different suggestions based on the inherently dynamic nature of social media.

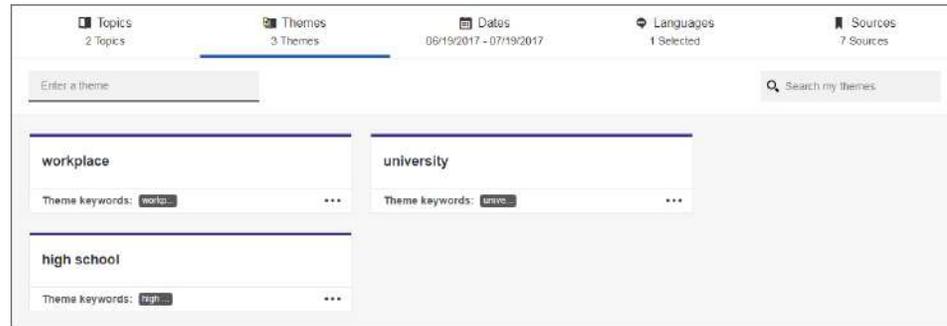
7. Let's add “training” as a context keyword.
8. Let's exclude “game” from our analysis.



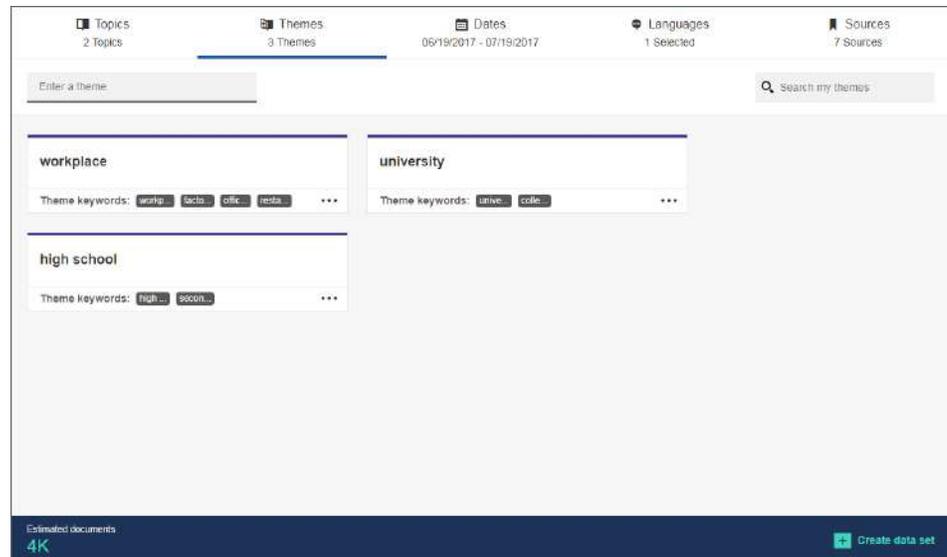
9. Now let's add mobile learning as a topic. Tap the **Go back** icon  and enter “#mlearning”.
10. Tap “#mlearning” and add the following keywords:
 - To **Topic keywords**:
 - mobile assisted learning
 - mobile learning
 - m-learning
 - distance learning - To **Context keywords**:
 - training - To **Exclude keywords**:
 - game



11. To create a richer understanding of these topics about e-learning and mobile learning, tap **Themes**.
12. You want to find out whether social media posts talk about where the training is provided. In **Theme keywords**, enter these keywords:
 - workplace
 - university
 - high school



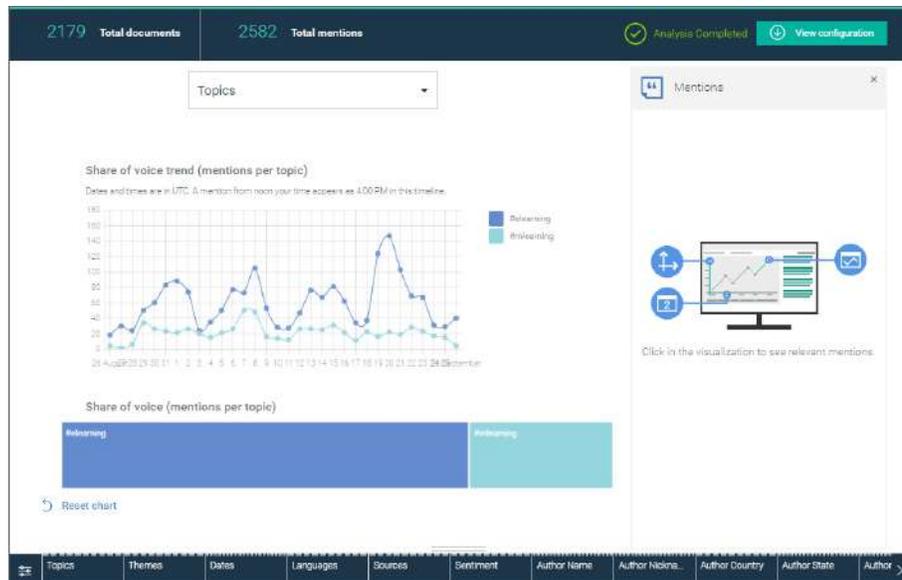
13. Let's add synonyms to these keywords to capture as much info as we can. Tap "workplace" and add the following **Theme keywords**:
 - factory
 - office
 - restaurant
 - store
 14. Tap the **Go back** icon  and then tap "university". Add the following **Theme keywords**:
 - college
 15. Tap the **Go back** icon  and then tap "high school". Add the following **Theme keywords**:
 - secondary school
- Tap the **Go back** icon  .



There are other areas in Watson Analytics for Social Media: **Dates**, **Languages**, and **Sources**. By default, all sources are mined for topic mentions in all supported languages in the past four weeks.

If you use different dates than in the tutorial, you might see different results in the analysis. If you want to match the tutorial exactly, change the date range to match the screen capture. But you don't have to do this.

16. We're ready to create and explore the analysis. Tap **Create data set**.
17. When the data set is created, tap **View analysis** to explore the visualizations that we create for you. You might see different visualizations based on the inherently dynamic nature of social media.
18. On the side is the **Mentions** panel where you can view the text that surrounds where your topics are mentioned. If you have the 10-day trial edition, you can't see the text of mentions. If you have a paid subscription, please explore the **Mentions** panel on your own and, if you need more info, check out the **Docs**.
19. Let's explore a few of the visualizations.
 - a. To see trends and share of voice for the topics that you defined, select **Topics** from the visualizations list.



- b. To have more room for the visualizations, close the **Mentions** panel.
- c. To deepen your analysis of the topics that you defined, select **Themes** from the visualizations list.

Here we see that the e-learning topic appears the most in “workplace” but many mentions didn’t talk about the themes that we specified.



- d. To understand the tone of the social media content, select **Sentiment**.
Sentiment terms are words that measure the tone of a mention. A mention is categorized as ambivalent when it has the same number of positive and negative sentiment terms. A mention is categorized as neutral when there are no sentiment terms that are detected in it.
Here we see that there are more neutral mentions for both topics and many negative mentions for #mlearning.



- e. Take a look at the other visualizations on your own.
20. Return to the landing page.



Results

Because you can quickly tap into social media data and understand the sentiment of a series of disparate or competitive hashtags through Watson Analytics, you can now focus on key aspects of your business that might have seemed elusive in the past. This provides a means to better align with departmental goals and even organizational agendas by using the power of Watson Analytics.

Chapter 6. What's next?

You learned how easy it is to get started with IBM Watson Analytics. Now you can add your own data and start discovering new insights about your business. Here are some tips to help you get going.

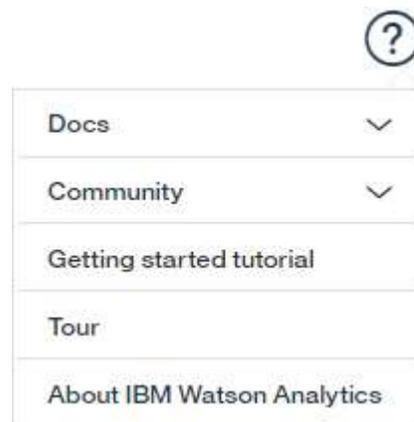
Add more data

You have several options for adding more data to Watson Analytics:

- In Watson Analytics, tap **New data**. Then, on the **Import** tab, tap **Sample data**.
- Add other sample data assets from the Watson Analytics community.
- Upload your own data. You might want to look at your data files to see whether the files need cleaning before uploading. Visit the Docs to learn about cleaning your data.

Learn more

There is much more you can do in Watson Analytics so check out the **Help** menu. Expand **Docs** or **Community** to see the sections that you can jump to.



Wait, there's more!

If you are subscribed to the Professional edition or the Plus edition of Watson Analytics, you have access to more types of data:

- Twitter metadata
- Cognos[®] BI reports
- Databases such as IBM DB2[®], IBM dashDB[®], IBM SQL Database for Bluemix[®], Microsoft SQL Server, MySQL, Oracle, PostgreSQL

You also have access to other features such as:

- More storage space
- Larger data assets
- Accessing data in the cloud, such as Box, Dropbox, and Microsoft OneDrive
- Sharing assets with other users in the same account (Professional edition only)

If you want to upgrade to one of these editions, tap  and tap **Account settings**. Then tap **Learn more** under **Subscription** to start upgrading your subscription.

Have fun!

Let's recap: you learned how to upload data, how to ask questions and discover insights in the sample data, and how to create a dashboard. Now you're ready to use Watson Analytics with your data.

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