

Hands-on Lab : Getting Started with Cognos Dashboard Embedded

Estimated time needed: 20 minutes

IBM Cognos Dashboard Embedded (CDE) is an AI-fueled business intelligence service 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 login to IBM Cloud Pak for Data platform through IBM Cloud and create a project there. Next, you will learn how to add a Cognos Dashboard Embedded (CDE) service and upload external data files to your project(supports CSV file only). Finally, you will learn general navigation around the CDE user interface (UI), and how to start a new dashboard with a template in CDE, populate it with a data visualization as well as save the dashboard.

Software Used in this Lab

Since for the assignment of this module you will be using IBM Cognos Dashboard Embedded (CDE), so in this lab you will get started with IBM Cognos Dashboard Embedded (CDE) Lite plan service through IBM Cloud as this is available at **no charge for 50 sessions/month**. A session is a **60 minutes period** where users can perform unlimited interactions with an embedded dashboard. Lite plan services are deleted after **30 days of inactivity**.

Dataset Used in this Lab

The dataset used in this lab comes from the following source: <https://www.kaggle.com/kyanyoga/sample-sales-data> under a [CC0: Public Domain license](#).

Objectives

After completing this lab, you will be able to:

- Login to IBM Cloud Pak for Data platform through IBM Cloud
- Create a project in IBM Cloud Pak for Data
- Add a Cognos Dashboard Embedded (CDE) service to your created project
- Navigate around the Cognos Dashboard Embedded (CDE) user interface
- Upload external data files to your created project (Supports .CSV files only)
- Start a new dashboard with a dashboard template and populate it with a data visualization

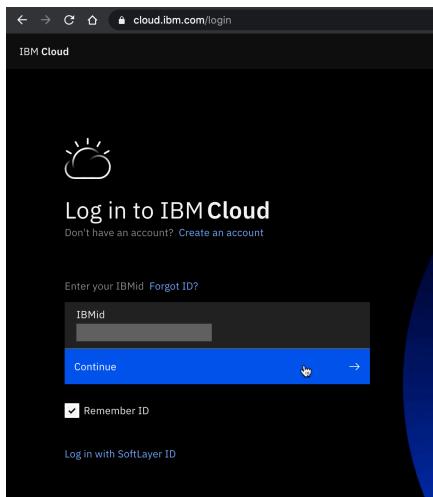
Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

In this exercise, you will how to login to IBM Cloud Pak for Data platform through IBM Cloud and create a project there.

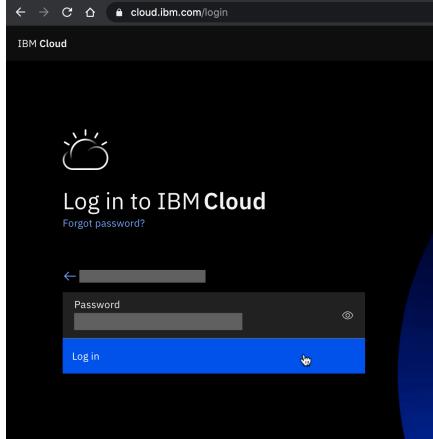
Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

- If you already have an instance of Watson Studio / Cloud Pak for Data, skip Task A.

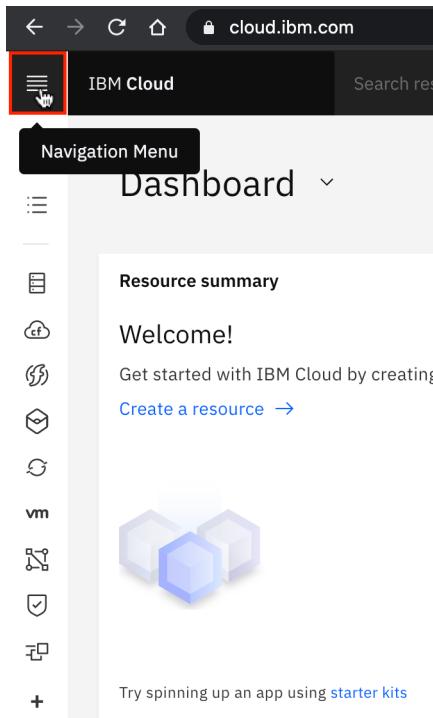
1. Go to cloud.ibm.com/login.
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



3. Enter your **password** and click **Log in**.



4. Click **Navigation Menu Icon** on the top left side.



5. From the navigation Menu sidebar, click **Watson**.

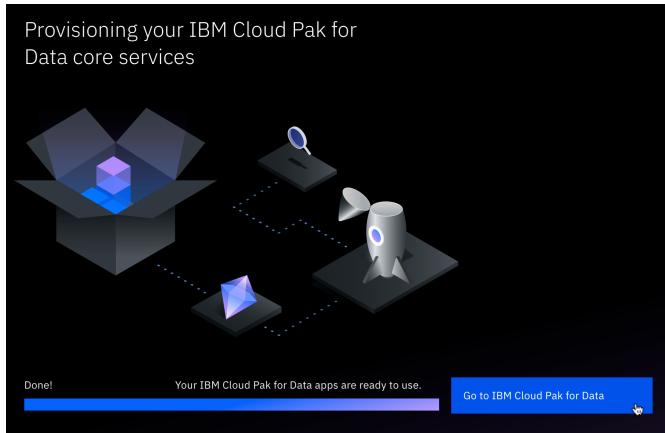
The screenshot shows the IBM Cloud dashboard with a sidebar containing various service categories. The 'Watson' section is highlighted with a red box. Other visible sections include Dashboard, Resource List, Classic Infrastructure (Cloud Foundry, Functions, Kubernetes, OpenShift, VMware, VPC Infrastructure), Security and Compliance, Code Engine, API Management, App Development, DevOps, Interconnectivity, Observability, Schematics, Apple, Blockchain, Integrate, Managed Solutions, and Watson.

6. Now from the section **Explore our other offerings**, click IBM Watson Studio **Try for free**. You will be redirected to IBM Cloud Pak (dataplatform.cloud.ibm.com) for Data platform.

The screenshot shows the 'Explore our other offerings' section of the website. It features several options: 'Consult with IBM', 'IBM Watson Studio' (which is highlighted with a red box), 'Engage us now!', and 'Watch a Demo'. The 'IBM Watson Studio' section contains a brief description and a 'Try for free' button.

7. Select a region matching the region of your IBM Cloud account. Then click **Log in with your IBMid**

The screenshot shows the 'Try IBM Cloud Pak for Data' landing page. It includes a 'Pick your region for services and data' section with a dropdown menu set to 'Dallas' (highlighted with a red box). Below this are sections for 'Create a new IBM Cloud account to activate' and 'Activate your IBM Cloud account'. A 'Log in with your IBMid' button is located at the bottom right of the page (also highlighted with a red box).

8. Click **Go to IBM Cloud Pak for Data**.

9. You have successfully logged in to the IBM Cloud Pak for Data platform.

Welcome, Sandip saha!

Sandip Saha Joy's Account

Learn by example

Work with data

Extend your capabilities

Overview

Notifications

No notifications

Deployment spaces

No deployment spaces

Your services

No Watson services to show

Quick navigation

Projects

Deployment spaces

Support

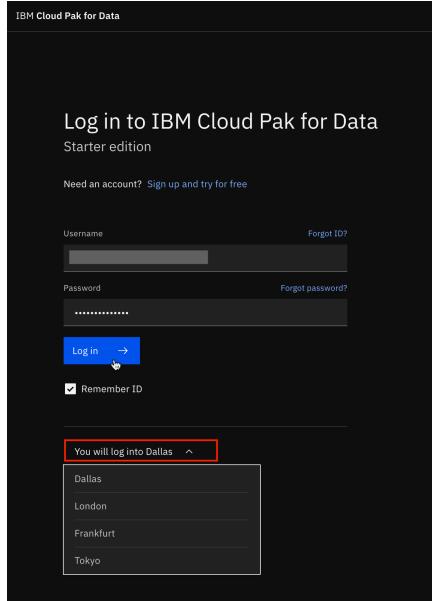
- Documentation
- FAQ
- What's new
- Give feedback
- Stack overflow
- Manage Tickets

Task B : Login to IBM Cloud Pak for Data

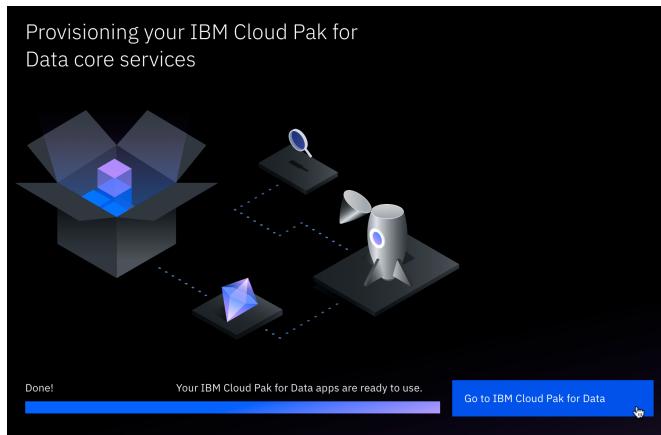
- If you just completed Task A, you will already be logged in, so skip Task B.

1. Go to dataplatform.cloud.ibm.com.

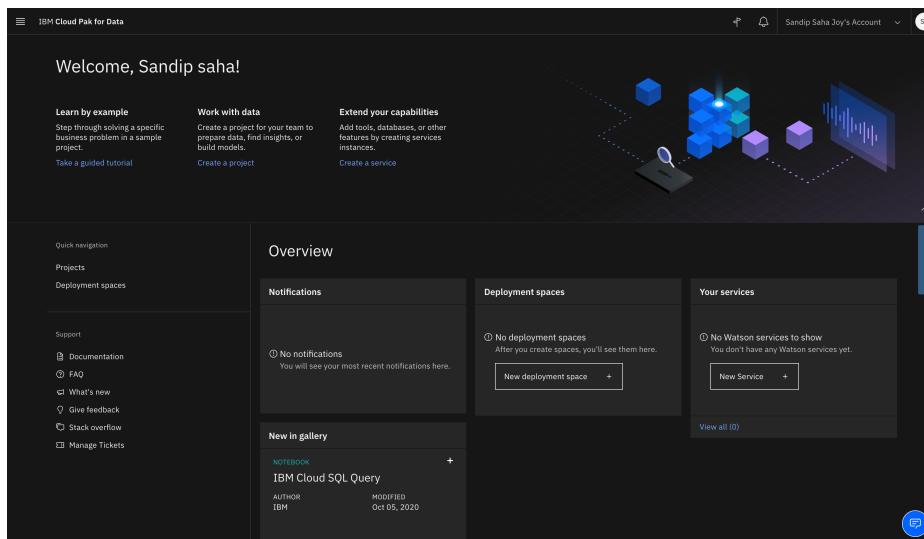
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud), **password** and select a **region**, same one you used for IBM Cloud account and IBM Cloud Pak for Data(if you have completed Task A).



3. Click **Go to IBM Cloud Pak for Data**.

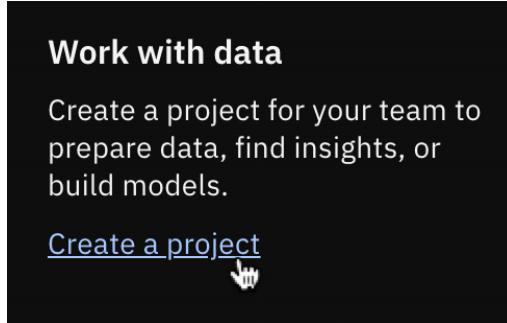


4. You have successfully logged in to the IBM Cloud Pak for Data platform.



Task C : Create a New Project

1. On the IBM Cloud Pak for Data welcome page, click **Create a project**.



2. Click **Create an empty project**.

3. Write **Capstone Project** as name of the project and click **Add** on Select storage service if no storage service appears. If a storage appears, proceed to step 6 directly.

4. You will be redirected to a new page. On the **Create** tab, select **Lite** plan. Then click **Create**.

5. Now you will be redirected to the previous new project page. Click **Refresh**.

New project

Define project details

Name
Capstone Project

Description
Project description

Define storage

① Select storage service
Add
Add an object storage instance, and then return to this page and click Refresh.
② Refresh

6. Once you see a storage service, click **Create**.

New project

Define project details

Name
Capstone Project

Description
Project description

Storage
Cloud Object Storage-iu

Choose project options

Restrict who can be a collaborator ⓘ

Project includes integration with [Cloud Object Storage](#) for storing project assets.

Create

7. You have successfully created a project. Click **IBM Cloud Pak for Data** at the top left to go back to homepage.

Projects / Capstone Project

Overview Assets Jobs Manage

Find assets Add asset New asset

0 asset All assets Start adding assets

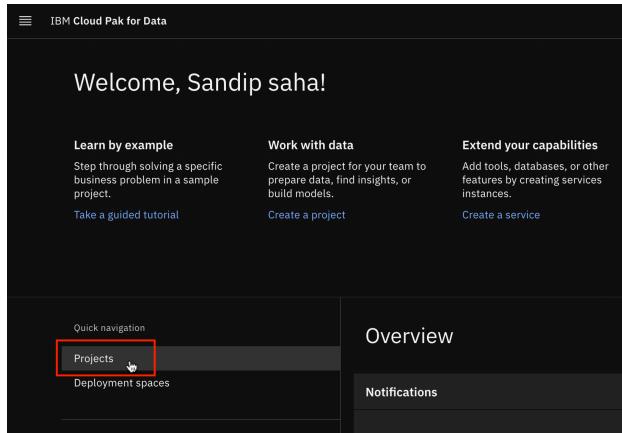
To get started with project assets, click **New asset** to create them, or **Add asset** to add existing ones.

Exercise 2 : Add a CDE service and Upload External Data

In this exercise, you will learn how to add a Cognos Dashboard Embedded (CDE) service and upload external data files to your project.

Task A : Add a CDE service

1. From IBM Cloud Pak for Data homepage, click **Projects** under Quick navigation.



2. Select **Capstone Project** you created earlier.

3. Click on **Manage** tab , from the **Services and integrations ** section click **Associate service**

4. Click **New service**.

5. Click **IBM Cognos Dashboard Embedded**.

The screenshot shows the Analytics service catalog. A search bar at the top contains the text "Find services". Below it, a "Category" dropdown is set to "Analytics", with a single option "Analytics" listed. The main content area displays a service card for "IBM Cognos Dashboard Embedded". The card includes a thumbnail icon, the service name, its category, a brief description ("Bring data to life directly from your application with this powerful and easy-to-use visualization service."), and a "Lite • Free" pricing indicator. A red box highlights the service card.

6. On the **Create** tab, select a close **region** and **Lite** plan. Then click **Create**.

The left screenshot shows the "Create" tab selected in the navigation bar. The "Region" dropdown is set to "Dallas". The "Pricing plan" section shows the "Lite" plan selected, which includes "50 sessions/month" and is "Free". The right screenshot shows the "Summary" tab with the service details: Region: Dallas, Plan: Lite, Service name: IBM Cognos Dashboard Embedded, and Resource group: Default. The "Create" button is highlighted with a red box in both screenshots.

7. Select **IBM Cognos Dashboard Embedded** service and click **Associate service** to add the service to **Capstone Project**.

The screenshot shows the "Associate service" page. It lists one item selected: "IBM Cognos Dashboard Embedded-pe". The "Status" column indicates "Not associated". The "Associate service" button is highlighted with a red box. The "Cancel" button is also visible.

8. Once the service association status appears green, **close** the associate service page.

The screenshot shows the "Associate service" page again. The service "IBM Cognos Dashboard Embedded-pe" is now listed with a green checkmark in the "Status" column, indicating it is "Associated". The "New service" button is visible at the top right.

Task B : Upload External Data Files(Supports .CSV Files Only)

1. Download the file [car_sales_data_sample.csv](#).
2. On the **Assets** page, click **Find and add data** icon. Click **Drop data files here or browse for files to upload**.

The screenshot shows the 'Assets' section of the IBM Cloud Pak for Data interface. The top navigation bar includes tabs for 'Overview', 'Assets' (which is highlighted with a red box and circled '1'), 'Jobs', and 'Manage'. To the right of the tabs are icons for 'Launch IDE', 'Help', 'Logs', and 'Metrics'. A red box highlights the 'Assets' tab. In the top right corner, there is a red box highlighting the 'New asset' button, which has a circled '2' above it. Below the navigation, there is a search bar with placeholder text 'Find assets' and buttons for 'Add asset' and 'New asset'. The main content area displays a message '0 asset' and a 'All assets' button. On the left, there is a section for 'Asset types' with icons for a bar chart and a diamond. On the right, there is a section titled 'Start adding assets' with instructions to click 'New asset' to create or 'Add asset' to add existing ones.

3. Browse to the file download location, select the downloaded CSV file, and click **Open**.

4. Once upload completes, **car_sales_data_sample.csv** will appear under **Data assets** section.

The screenshot shows the 'Data assets' section. It displays a table with a single row. The columns are 'Name' and 'Type'. The row contains 'car_sales_data_sample.csv' and 'Data Asset'. There is also a checkbox column with an unchecked box.

	Name	Type
<input type="checkbox"/>	CSV car_sales_data_sample.csv	Data Asset

Exercise 3 : Navigate around CDE UI and Start a New Dashboard with a Template

In this exercise, you will learn general navigation around the CDE user interface (UI), and how to start a new dashboard with a template in CDE, populate it with a data visualization as well as save the dashboard.

1. On the **Overview** page of Capstone Project project, click **New asset**.

The screenshot shows the 'Capstone Project' overview page. The top navigation bar includes tabs for 'Overview' (which is highlighted with a red box), 'Assets', 'Jobs', 'Access Control', and 'Settings'. To the right of the tabs are icons for 'Add to project' (which is highlighted with a red box), 'Help', 'Logs', and 'Metrics'. Below the navigation, the project name 'Capstone Project' is displayed along with the last update date 'Oct 08, 2020'. There is a 'Readme' link. On the right side, there are counts for 'Assets' (1) and 'Collaborators' (1).

2. Scroll down and select **Dashboard Editor**.

New asset

Select the tool to create an operational or configuration asset.

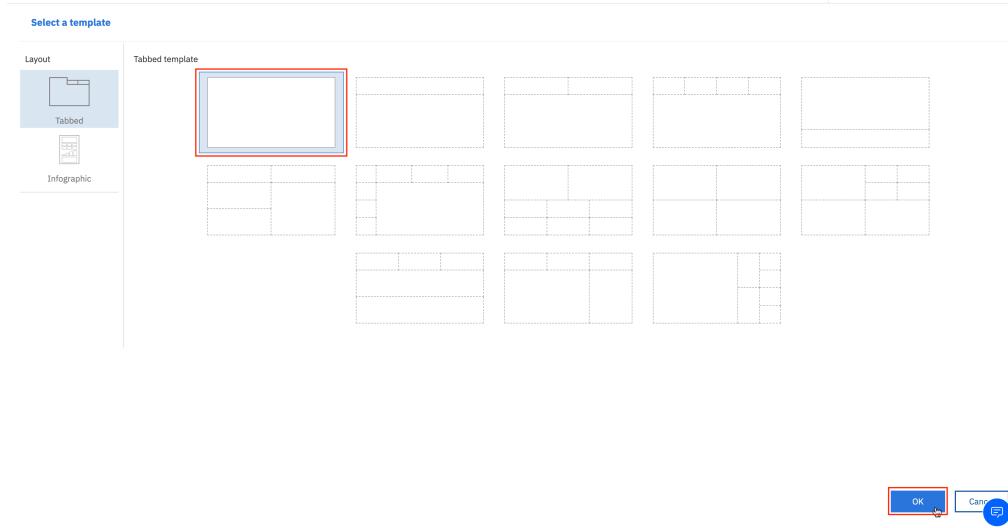
The screenshot shows a search bar at the top with the placeholder "Find tools by name or purpose". Below it is a sidebar titled "Tool type" with a "All types" button selected. The main area displays several tool cards:

- Dashboard editor**: A card with a red border around its icon and title, indicating it is the selected tool. Description: "Create a set of visualizations of analytical results on a graphical canvas without coding."
- Data Refinery**: Description: "Create a flow of ordered operations to cleanse and shape data. Visualize data to identify problems and discover insights."
- Decision Optimization**: Description: "Create and manage scenarios to find the best solution to your optimization problem by comparing different combinations of your model, data, and solutions."
- Pipelines**: Description: "Automate the model lifecycle, including preparing data, training models, and creating deployments."
- SPSS Modeler**: Description: "Create a visual flow that uses modeling algorithms to prepare data and build and train a model, using a guided approach to machine learning that doesn't require coding."
- Code editors**: A card with a red border around its icon and title, indicating it is the selected tool. Description: "Create a visual flow that uses modeling algorithms to prepare data and build and train a model, using a guided approach to machine learning that doesn't require coding."

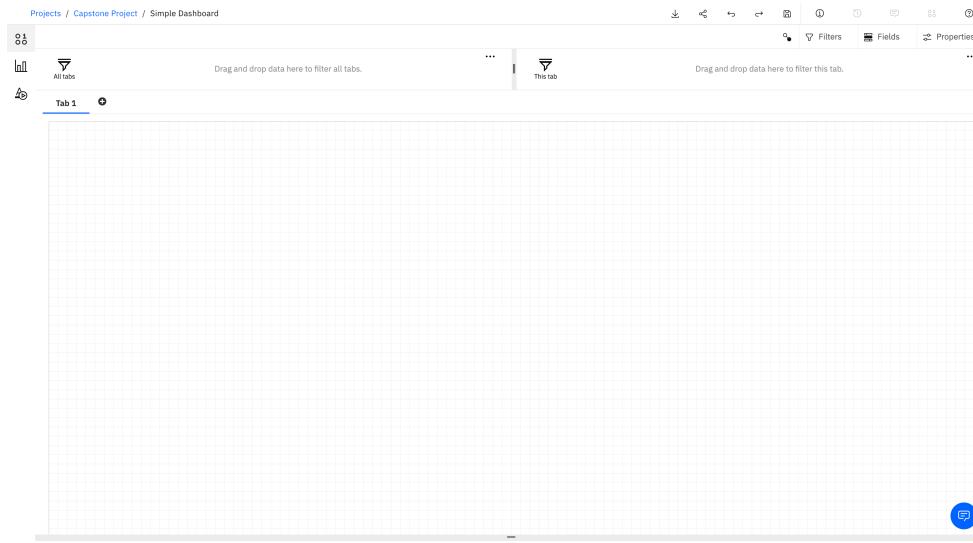
3. Name the dashboard as **Simple Dashboard**. Then select a **Cognos Dashboard Embedded service** from the list and click **Create**.

The screenshot shows a "New dashboard" dialog. At the top, there are tabs for "Blank" and "From file", with "Blank" selected. Below that, there are fields for "Name" (containing "Simple Dashboard") and "Description (Optional)" (containing "Dashboard description"). Further down, there is a section titled "IBM Cognos Dashboard Embedded service" with a dropdown menu. The dropdown menu has two items: "Select Cognos Dashboard Embedded service from the list" and "IBM Cognos Dashboard Embedded-pe". Both items are highlighted with a red border. At the bottom right of the dialog are "Cancel" and "Create" buttons, with "Create" being highlighted with a red border.

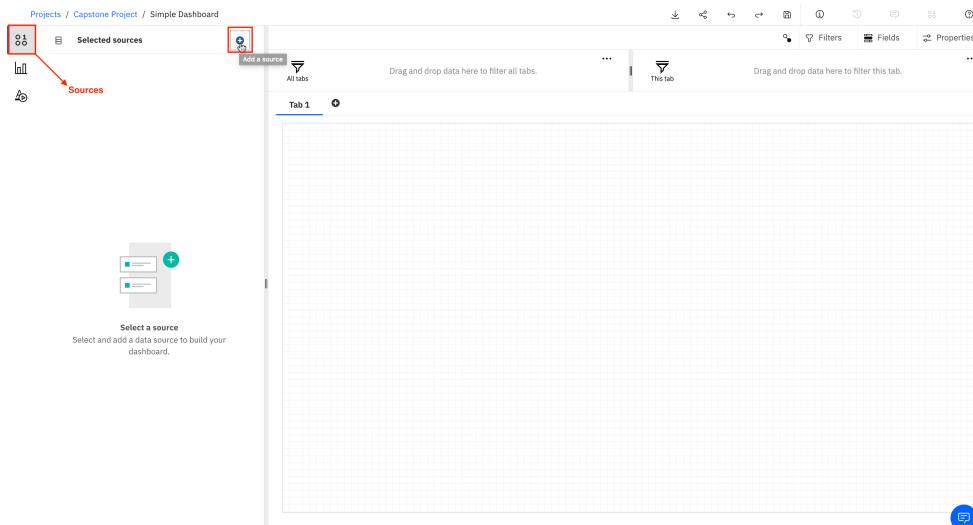
4. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **one-panel template**. Click **OK**.



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

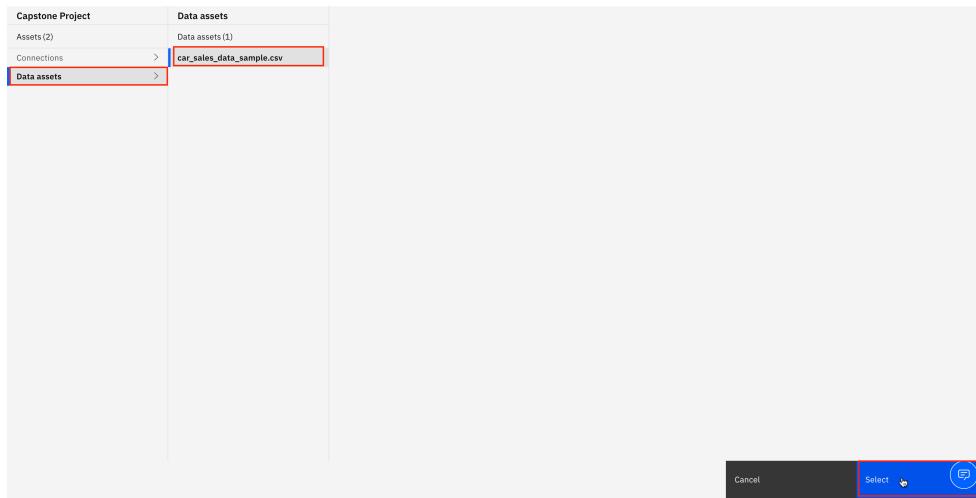


6. Click **Sources** icon from the **Navigation** panel to open the data source panel. Then click **Add a source** icon.



7. Select **Data assets**. Select **car_sales_data_sample.csv** and click **Select**.

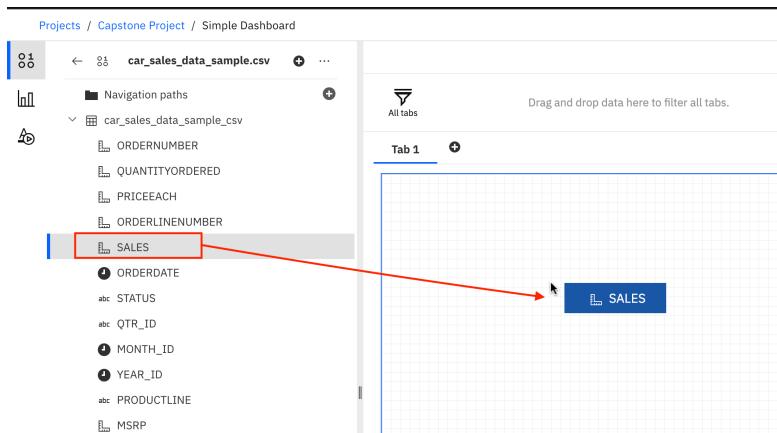
Select connection source



8. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the file **car_sales_data_sample.csv**. Click on **car_sales_data_sample.csv**.



9. From the **Data Source** panel, select **SALES**. Drag it to the **Panel** and release.



10. Now you have successfully started to populate your dashboard with data visualizations too!

10M

SALES

11. To save the newly created dashboard, click **Save** icon.



Congratulations! You have completed the Lab.

Author(s)

- [Sandip Saha Joy](#)

Other Contributor(s)

Changelog

Date	Version	Changed by	Change Description
2022-05-04	1.1	Malika	Updated screenshot
2020-10-07	1.0	Sandip Saha Joy	Initial version created

© IBM Corporation 2023. All rights reserved.