

# 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

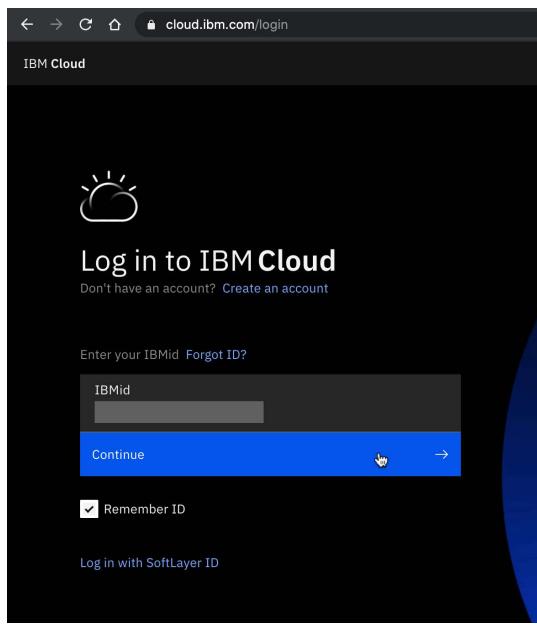
## Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

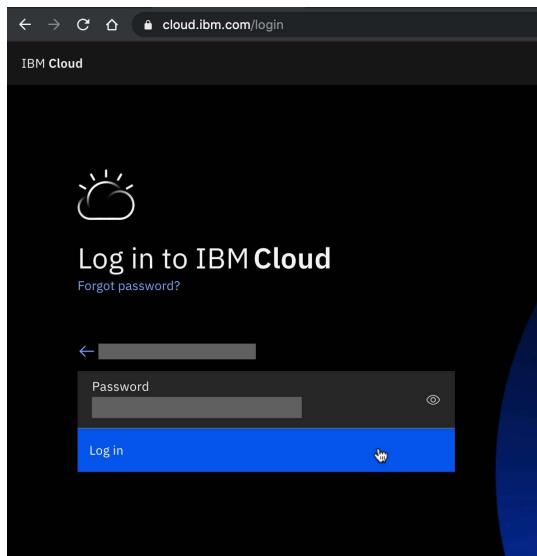
### Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

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

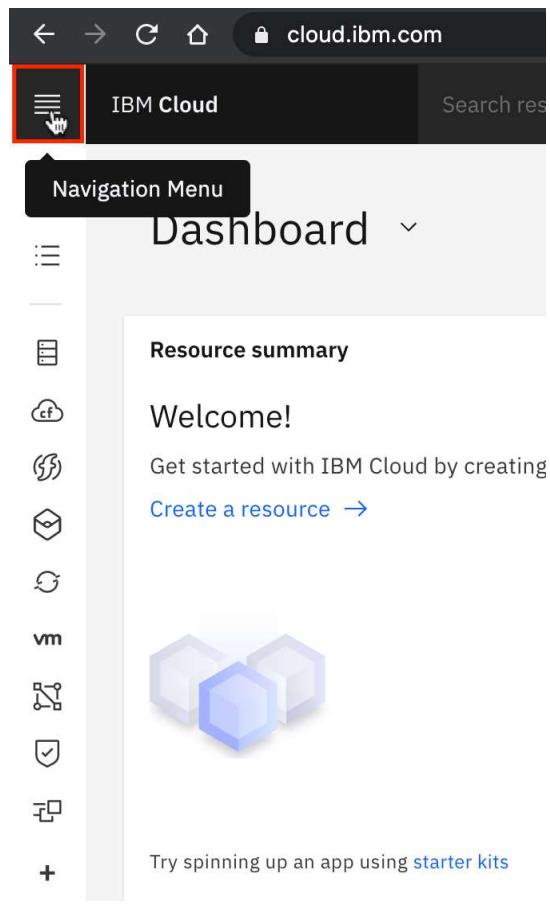
1. Go to [cloud.ibm.com/login](http://cloud.ibm.com/login).
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



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 interface. At the top, there's a header bar with icons for back, forward, refresh, and a lock, followed by the URL 'cloud.ibm.com'. Below the header is a dark navigation bar with the 'IBM Cloud' logo. The main content area has a sidebar on the left containing several sections: 'Dashboard', 'Resource List', 'Classic Infrastructure' (with sub-options like 'Cloud Foundry', 'Functions', 'Kubernetes', 'OpenShift', 'VMware', 'VPC Infrastructure'), 'Security and Compliance', 'Code Engine', 'API Management', 'App Development', 'DevOps', 'Interconnectivity', 'Observability', 'Schematics', and 'Watson' (which is highlighted with a red border). Below the sidebar, the main area displays various service cards, with one for 'Watson' also having a red border around its 'Try for free' button.

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](https://dataplatform.cloud.ibm.com)) for Data platform.

This screenshot shows the 'Explore our other offerings' section of the website. It features several cards: 'Consult with IBM' (describing how to work with consultants), 'IBM Watson Studio' (described as a tool for fast insights using data, code, and graphical tools), and others like 'Apple', 'Blockchain', 'Integrate', and 'Managed Solutions'. The 'IBM Watson Studio' card is highlighted with a red border around its 'Try for free' button.

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

## Try IBM Cloud Pak for Data

A starter set of Cloud Pak for Data services, fully managed on IBM Cloud. Provision the integrated Lite versions of Watson Studio, Watson Machine Learning, and Watson Knowledge Catalog as part of Cloud Pak for Data as a Service. Add more services as you need them.

Pick your region for services and data  
Select the region closest to you, or where you plan on hosting your data and services.

Dallas            London      Frankfurt      Tokyo

Create a new IBM Cloud account to activate

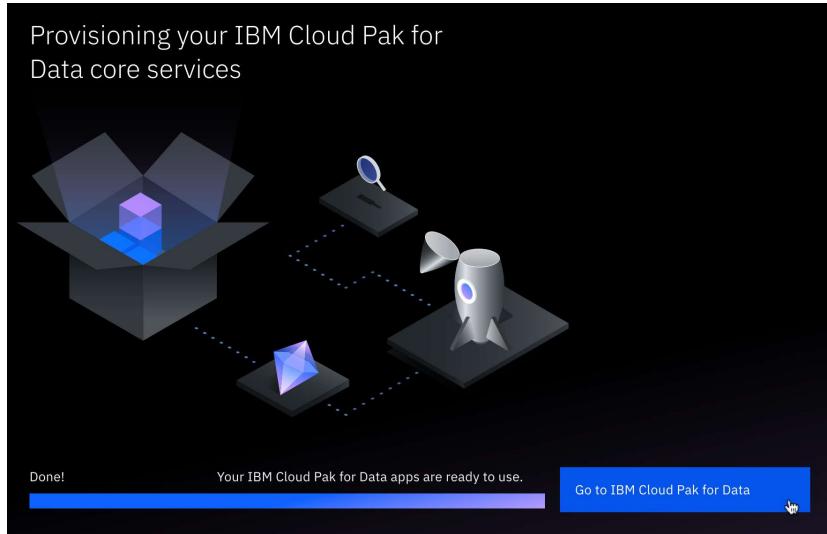
Create an IBM Cloud Account  
Email  
 I accept the [IBM Cloud Pak for Data terms](#).

Next →

Activate your IBM Cloud account  
By logging in, you agree to our [terms](#) and that you have read our [Data Use Policy](#), including our [Cookie Use](#).

[Log in with your IBMid](#)

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!

**Learn by example**  
Step through solving a specific business problem in a sample project.  
Take a guided tutorial

**Work with data**  
Create a project for your team to prepare data, find insights, or build models.  
Create a project

**Extend your capabilities**  
Add tools, databases, or other features by creating services instances.  
Create a service

**Overview**

**Notifications**  
No notifications  
You will see your most recent notifications here.

**Deployment spaces**  
No deployment spaces  
After you create spaces, you'll see them here.  
New deployment space +

**Your services**  
No Watson services to show  
You don't have any Watson services yet.  
New Service +

**New in gallery**  
NOTEBOOK IBM Cloud SQL Query  
AUTHOR IBM MODIFIED Oct 05, 2020

**Feedback**

## 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](https://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).

IBM Cloud Pak for Data

### Log in to IBM Cloud Pak for Data

Starter edition

Need an account? [Sign up and try for free](#)

Username  Forgot ID?

Password  Forgot password?

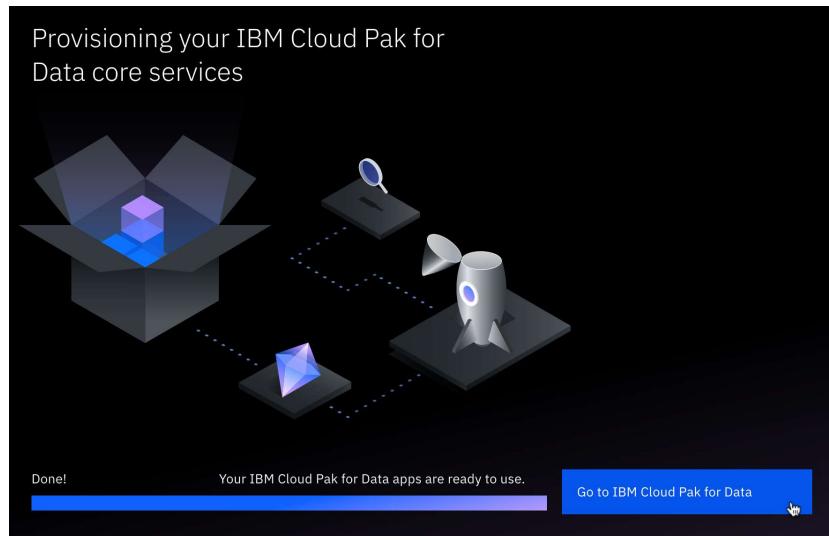
Remember ID

You will log into Dallas ▾

- Dallas
- London
- Frankfurt
- Tokyo

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

## Provisioning your IBM Cloud Pak for Data core services



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

A screenshot of the IBM Cloud Pak for Data welcome page. The header says "Welcome, Sandip saha!". The main area has three sections: "Learn by example", "Work with data", and "Extend your capabilities". The "Work with data" section contains links for "Create a project", "Create a guided tutorial", and "Take a guided tutorial". The "Overview" section shows "Notifications" (No notifications), "Deployment spaces" (No deployment spaces), and "Your services" (No Watson services to show). A sidebar on the left includes "Quick navigation" with links for "Projects", "Deployment spaces", "Support" (Documentation, FAQ, What's new, Give feedback, Stack overflow, Manage Tickets), and "Feedback".

## Task C : Create a New Project

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

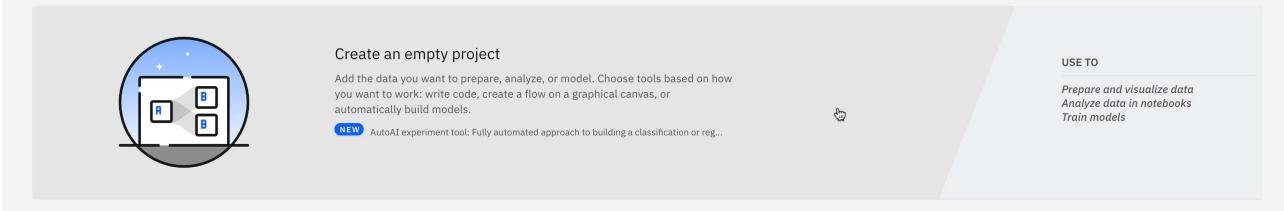
A screenshot of the "Work with data" section. It says "Create a project for your team to prepare data, find insights, or build models." Below that is a large blue button labeled "Create a project" with a hand cursor icon pointing at it.

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

[← Back](#)

## Create a project

Choose whether to create an empty project or to preload your project with data and analytical assets. Add collaborators and data, and then choose the right tools to accomplish your goals. Add services as necessary.



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

The screenshot shows the 'Define project details' section with 'Name' set to 'Capstone Project'. The 'Define storage' section has a step 1 'Select storage service' with 'Add' and 'Refresh' buttons. Step 2 'Refresh' is highlighted with a red box.

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

The screenshot shows the 'New project' wizard. The 'Storage' section is highlighted with a red circle. It lists 'Cloud Object Storage-iu'. At the bottom right, there are 'Cancel' and 'Create' buttons, with 'Create' being highlighted with a red box.

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

The screenshot shows the 'Assets' tab in the 'Capstone Project' dashboard. It displays 0 assets under 'All assets'. There is a 'Start adding assets' callout with instructions to click 'New asset' or 'Add asset'. The 'New asset' button is highlighted with a red box.

## 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

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

The screenshot shows the IBM Cloud Pak for Data homepage. At the top, there's a header with the title 'IBM Cloud Pak for Data'. Below the header, a welcome message says 'Welcome, Sandip saha!'. There are three main sections: 'Learn by example', 'Work with data', and 'Extend your capabilities'. Under 'Work with data', there are two buttons: 'Create a project' and 'Create a service'. In the bottom left corner, there's a 'Quick navigation' bar with three items: 'Projects' (which is highlighted with a red box and has a cursor icon over it), 'Deployment spaces', and 'Overview' (which is the active page, indicated by a grey background). To the right of the navigation bar, there's a 'Notifications' section.

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

The screenshot shows the 'Projects' page. At the top, there's a header with the title 'IBM Cloud Pak for Data' and a 'Projects' tab. Below the header, there's a search bar with the placeholder 'Which project are you looking for?'. The main area shows a table with columns 'Name' and 'Status'. One row in the table is highlighted with a red box and has a cursor icon over it, indicating it's the selected project. The row contains the text 'Capstone Project'.

- Click on **Manage** tab , from the \*\*Services and integrations\*\* section click **Associate service**

The screenshot shows the 'Manage' tab in the 'Services & integrations' section. The tab is highlighted with a red box and has a circled '1' above it. On the left side, there's a sidebar with several options: 'Project', 'General', 'Access control', 'Environments', 'Resource usage', and 'Services & integrations'. The 'Services & integrations' option is highlighted with a red box and has a circled '2' above it. The main content area has a heading 'Associate IBM Cloud services with this project to add tools, compute environments, or other capabilities.' Below this, there's a 'Find services' search bar and a table with columns 'Name' and 'Service type'. A blue button labeled 'Associate service +' is highlighted with a red box and has a circled '3' above it. At the bottom, there's a message 'No services Click Associate service or ask a project Admin to associate one' next to a small 3D cube icon.

4. Click **New service**.

Associate service  
Choose an existing or add a new service to associate with your project.

Filter by: Resource Groups ▾ 2 Locations ▾ None

Name	Type	Plan	Location	Status	Group

New service +

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

Find services

## Analytics

Category

Analytics

**IBM Cognos Dashboard Embedded**  
Analytics

Bring data to life directly from your application with this powerful and easy-to-use visualization service.

Lite • Free

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

Services catalog /

### IBM Cognos Dashboard Embedded

Author: IBM • Date of last update: Aug 17, 2020 • Docs

**Create**

Select a region

Select a region

Dallas

Pricing plan

Displayed prices do not include tax. Monthly prices shown are for country or region: United States

Plan	Features	Pricing
Lite	50 sessions/month  A session is a 60 minute period where end-users can perform unlimited interactions with an embedded dashboard.  Lite plan services are deleted after 30 days of inactivity.	Free <input checked="" type="checkbox"/>
Pay as you go	After 50 sessions Live connection to underlying data Embed dashboards where users are without losing interactivity Smart Creation of Visualizations Interactive exploration of data through filtering and navigation paths	\$0.05 USD/Session

**Summary**

**IBM Cognos Dashboard Embedded**

Region: Dallas  
Plan: Lite  
Service name: IBM Cognos Dashboard Embedded-1h  
Resource group: Default

**Create**

[View terms](#)

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

Associate service  
Choose an existing or add a new service to associate with your project.

Filter by: Resource Groups ▾ 2 Locations ▾ 1 sandipsahajoy@ibm.com ▾

1 item selected						Associate service	Cancel
Name	Type	Plan	Location	Status	Group		
<input checked="" type="checkbox"/> IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded	Lite	Dallas	Not associated	Default		

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

The screenshot shows a table with one row of data. The columns are Name, Type, Plan, Location, Status, and Group. The data row contains: IBM Cognos Dashboard Embedded-pe, IBM Cognos Dashboard Embedded, Lite, Dallas, Associated (green checkmark), and Default. A red box highlights the close button in the top right corner of the browser window.

Name	Type	Plan	Location	Status	Group
IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded	Lite	Dallas	Associated	Default

## 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' tab selected in the navigation bar (circled in red). A large red circle labeled '2' is positioned over the 'Click here to add a Data set' button. The main area displays asset types like 'All assets' and 'Data assets'. A callout box with the text 'Start adding assets' and instructions to click 'New asset' to create them or 'Add asset' to add existing ones is overlaid on the right side.

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.

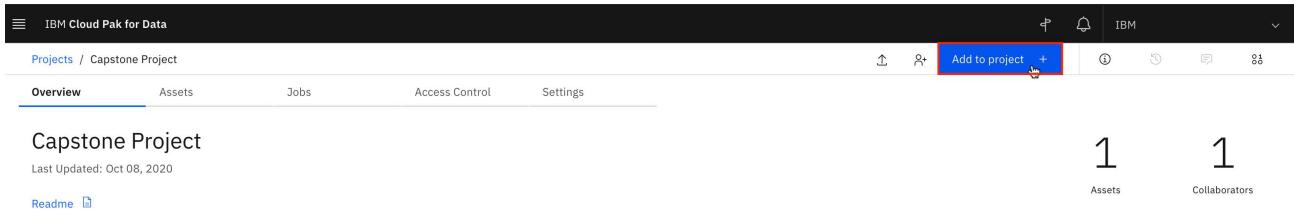
The screenshot shows the 'Data assets' section expanded. It displays a table with one row. The columns are Name and Type. The data row contains: CSV car\_sales\_data\_sample.csv and Data Asset. A red box highlights the 'car\_sales\_data\_sample.csv' link.

Name	Type
CSV car_sales_data_sample.csv	Data Asset

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

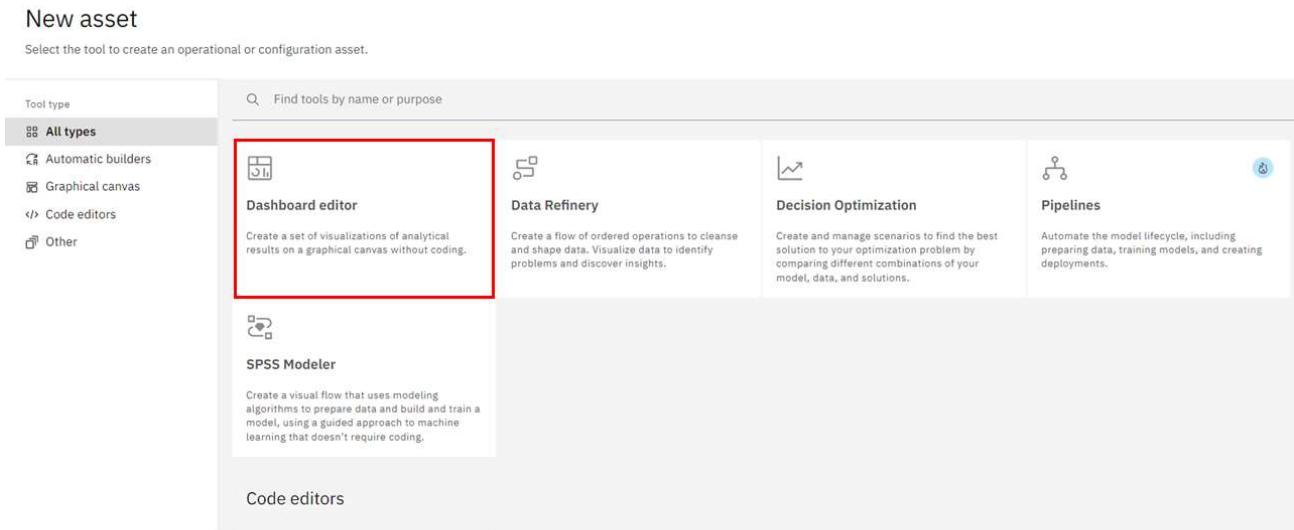
In this exercise, you will learn general navigation around the CDE user interface (UI), and how to start a new dashboard with a template in CDE, populate it with a data visualization as well as save the dashboard.

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



The screenshot shows the 'IBM Cloud Pak for Data' interface. At the top, there's a header with the project name 'Capstone Project'. Below the header, there are tabs for 'Overview', 'Assets', 'Jobs', 'Access Control', and 'Settings'. The 'Overview' tab is selected. In the center, there's a summary card for the project, showing '1 Assets' and '1 Collaborators'. At the bottom left, there's a 'Readme' link. At the top right, there are several icons including a search icon, a refresh icon, and a user profile icon. A red box highlights the 'Add to project' button in the top right corner.

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



The screenshot shows the 'New asset' creation page. On the left, there's a sidebar with 'Tool type' filters: 'All types' (selected), 'Automatic builders', 'Graphical canvas', 'Code editors', and 'Other'. The main area has a search bar 'Find tools by name or purpose'. Below it, there are four tool cards: 'Dashboard editor' (highlighted with a red box), 'Data Refinery', 'Decision Optimization', and 'Pipelines'. Each card has a small icon and a brief description. At the bottom, there are two more sections: 'SPSS Modeler' and 'Code editors'.

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

## New dashboard

Blank      From file

Name  
Simple Dashboard

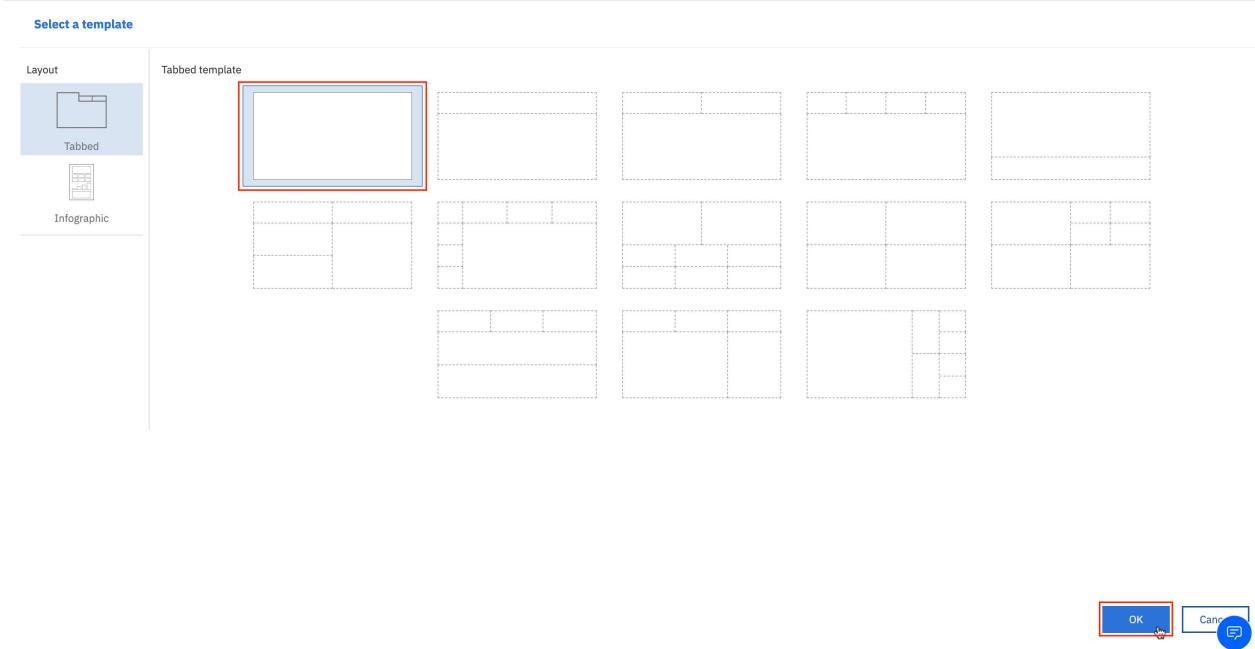
Description (Optional)  
Dashboard description

IBM Cognos Dashboard Embedded service  
Select Cognos Dashboard Embedded service from the list

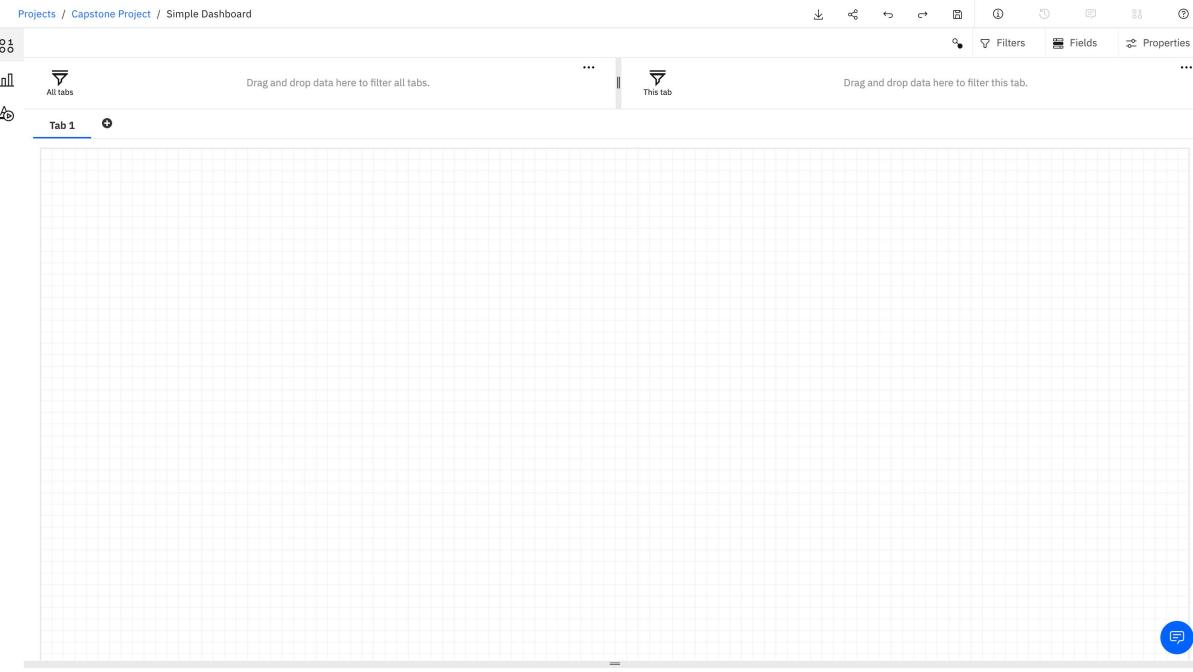
IBM Cognos Dashboard Embedded-pe

Cancel      Create

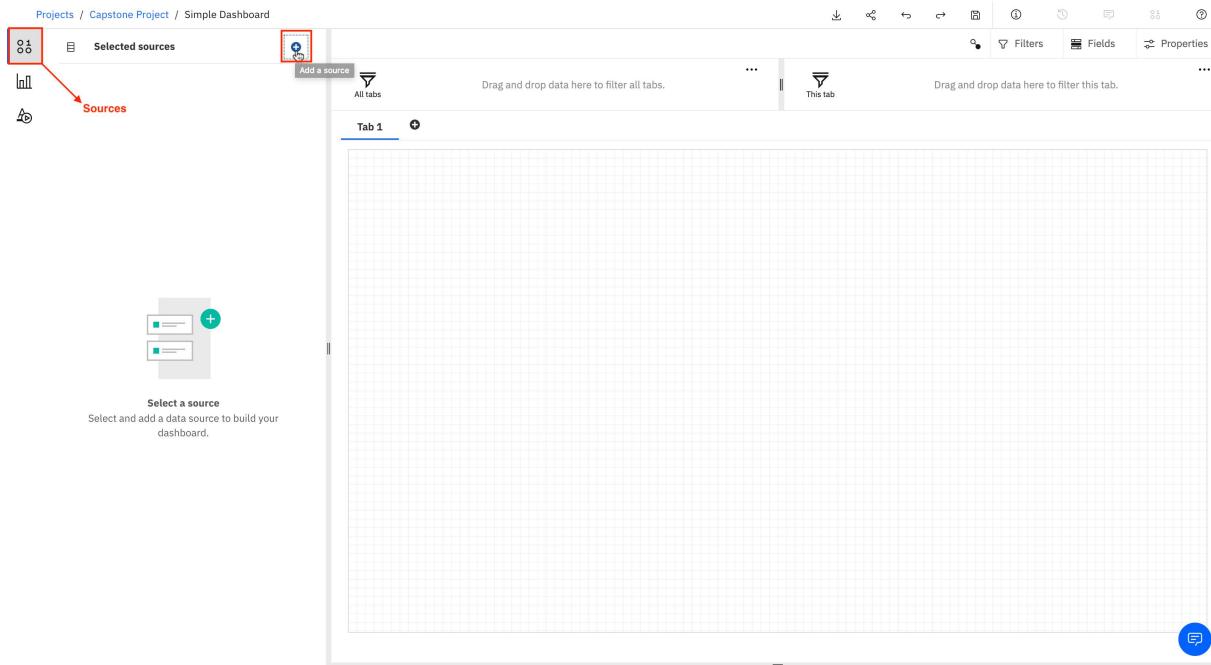
4. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **one-panel template**. Click **OK**.



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.

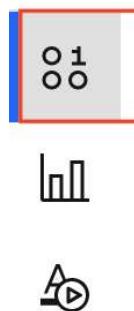


7. Select **Data assets**. Select **car\_sales\_data\_sample.csv** and click **Select**.

### Select connection source

The screenshot shows the 'Data assets' section of the Data Source panel. A red box highlights the 'car\_sales\_data\_sample.csv' file under 'Data assets (1)'. At the bottom right, there are 'Cancel', 'Select' (which is highlighted with a blue border), and a help icon.

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.

The screenshot shows the 'car\_sales\_data\_sample.csv' data source panel. On the left, a tree view shows fields like ORDERNUMBER, QUANTITYORDERED, PRICEEACH, ORDERLINENUMBER, and SALES. The 'SALES' field is highlighted with a red box and has a red arrow pointing to the 'Panel' area on the right. The 'Panel' area contains a tab labeled 'Tab 1' with a placeholder for data visualizations.

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

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