



# Hands-on Lab : Getting Started with Cognos Dashboard Embedded

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**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

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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

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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**.

## Objective

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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

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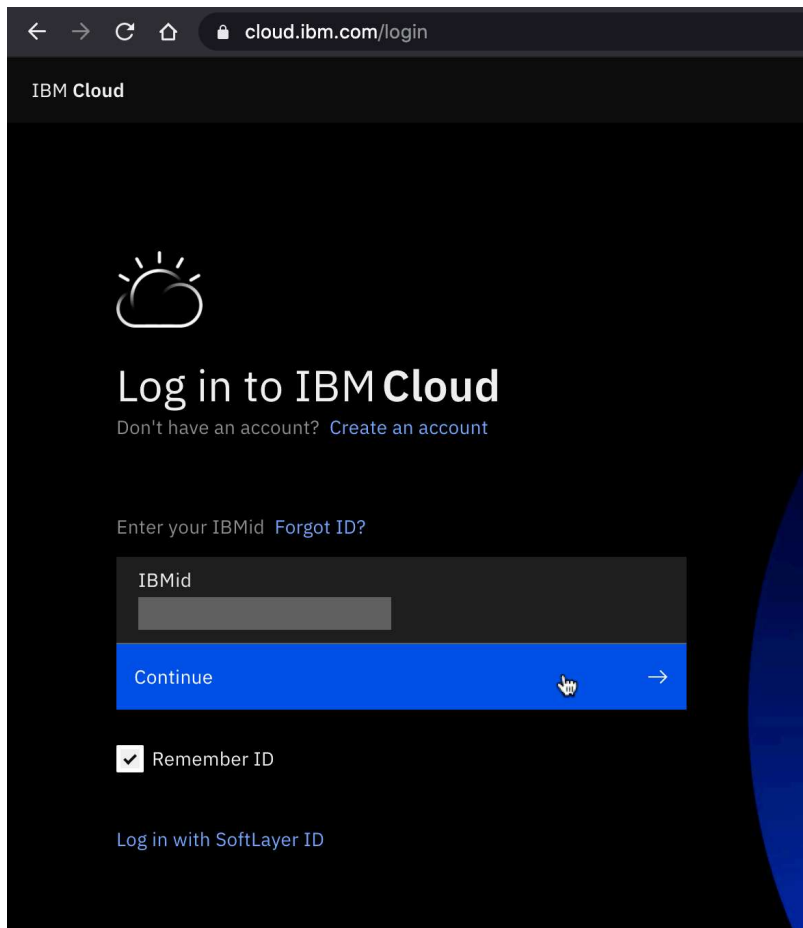
In this exercise, you will how to login to IBM Cloud Pak for Data platform through IBM Cloud and create a project there.

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

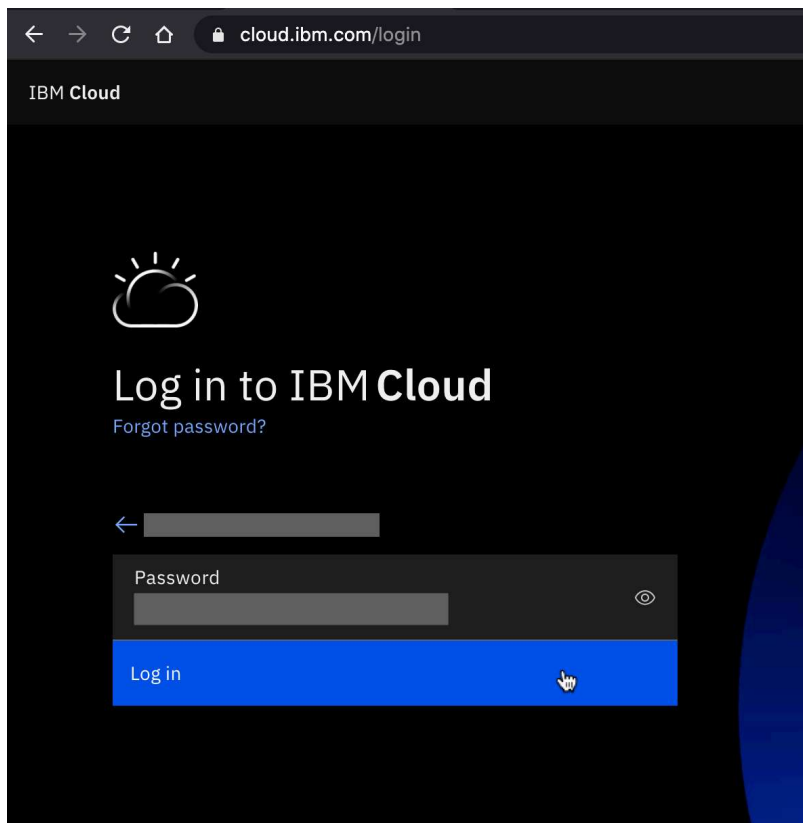
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- If you already have an instance of Watson Studio / Cloud Pak for Data , skip Task A.

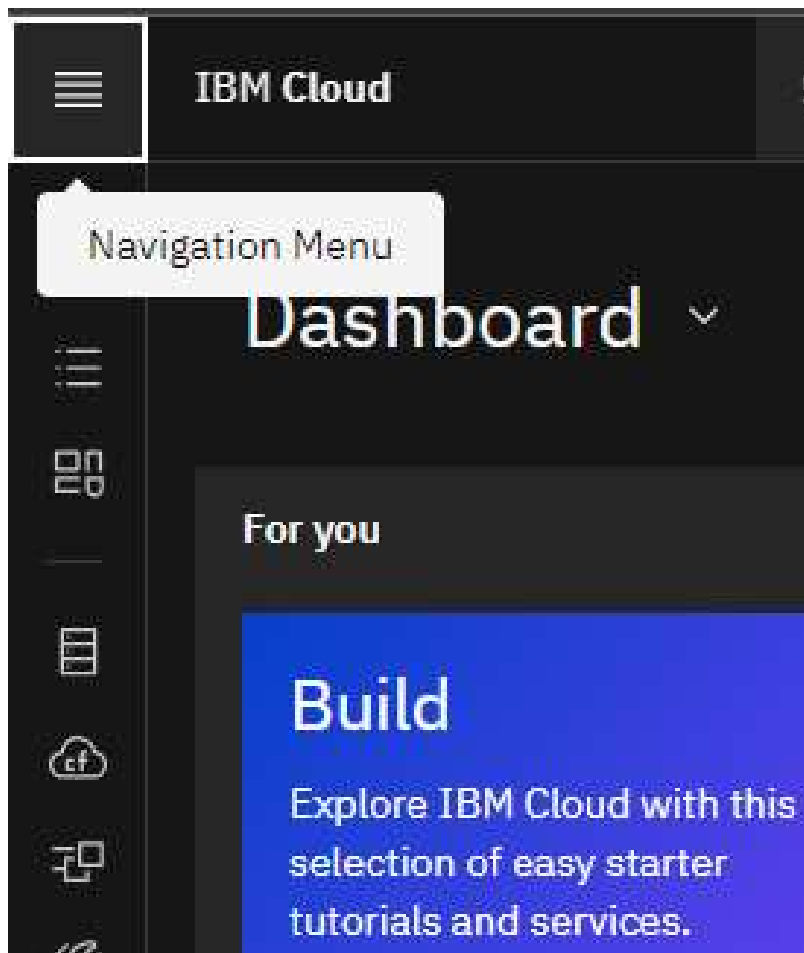
1. Go to [cloud.ibm.com/login](https://cloud.ibm.com/login).
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



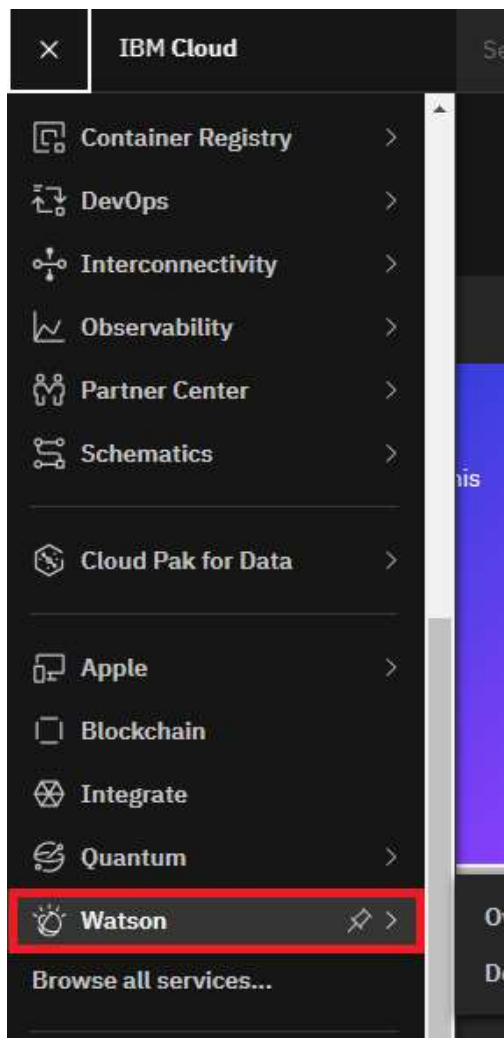
3. Enter your **password** and click **Log in**.



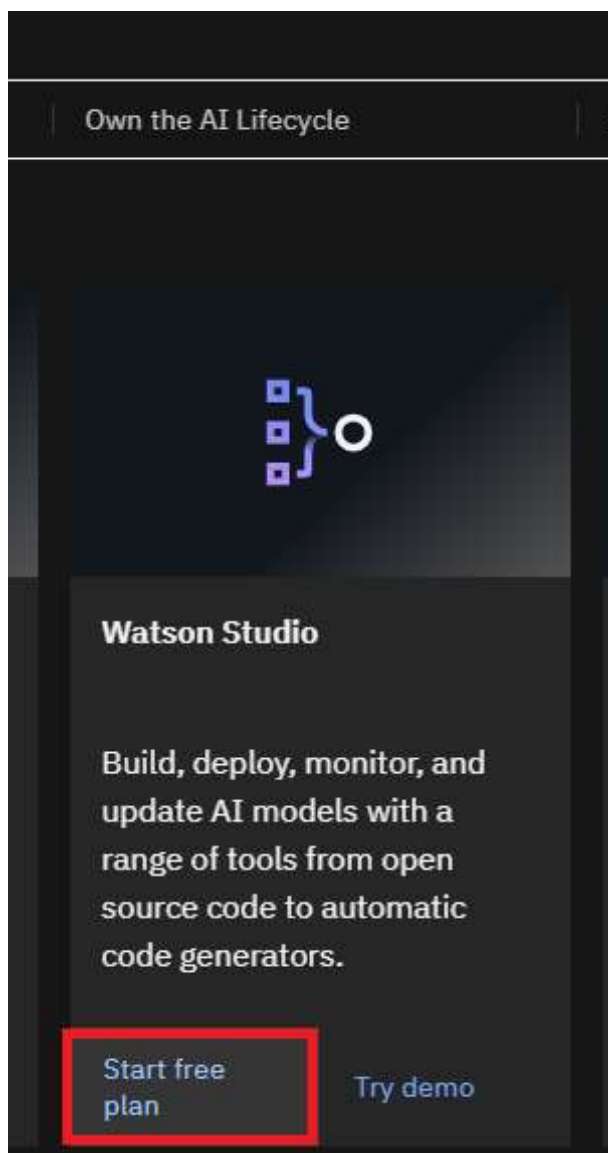
4. Click **Navigation Menu Icon** on the top left side.



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



6. Now from the section **All Services**, click Watson Studio **Start free plan**. You will see a dialog box to enter the region and the name of your Watson Studio instance.



7. **Select a region** matching the region of your IBM Cloud account and provide a name for your Watson Studio instance. Click on the Create button.

**Watson Studio** [X]

Select a region...

eu-de [v]

**Configure your resource**

Instance name

Instance1

Resource group

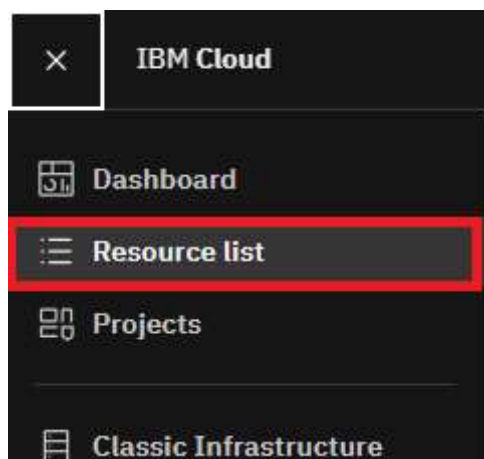
Default [v]

Add tags

^ **Total cost** \$0.00

Cancel Create

8. You will be redirected to IBM Cloud Pak ([dataplatform.cloud.ibm.com](https://dataplatform.cloud.ibm.com)) for Data platform. In case you are not redirected to IBM Cloud Pak page, you need to go to the Resource List from the Navigation Menu.



9. Select your Watson Studio instance from the AI/Machine Learning section.

<

Resource list Create resource +

Name	Group	Location	Product	Status	Tags
Filter by name or IP address...	Filter by group or org...	Filter...	Filter...	Filter...	Filter...
Converged infrastructure (0)					
Enterprise applications (0)					
AI / Machine Learning (3)					
Instance1	Default	Frankfurt	Watson Studio	Active	—
KnowledgeCatalog	Default	Dallas	Watson Knowledge Catalog	Active	1
WatsonOpenScale	Default	Dallas	Watson OpenScale	Active	1
Analytics (0)					
Blockchain (0)					
Databases (1+)					
Developer tools (0+)					
Logging and monitoring (0)					

10. Click on **Launch in IBM Cloud Pak for Data**.

IBM Cloud Search resources and products... Catalog


Resource list /

# Instance1

Active Add tags

Manage

Plan

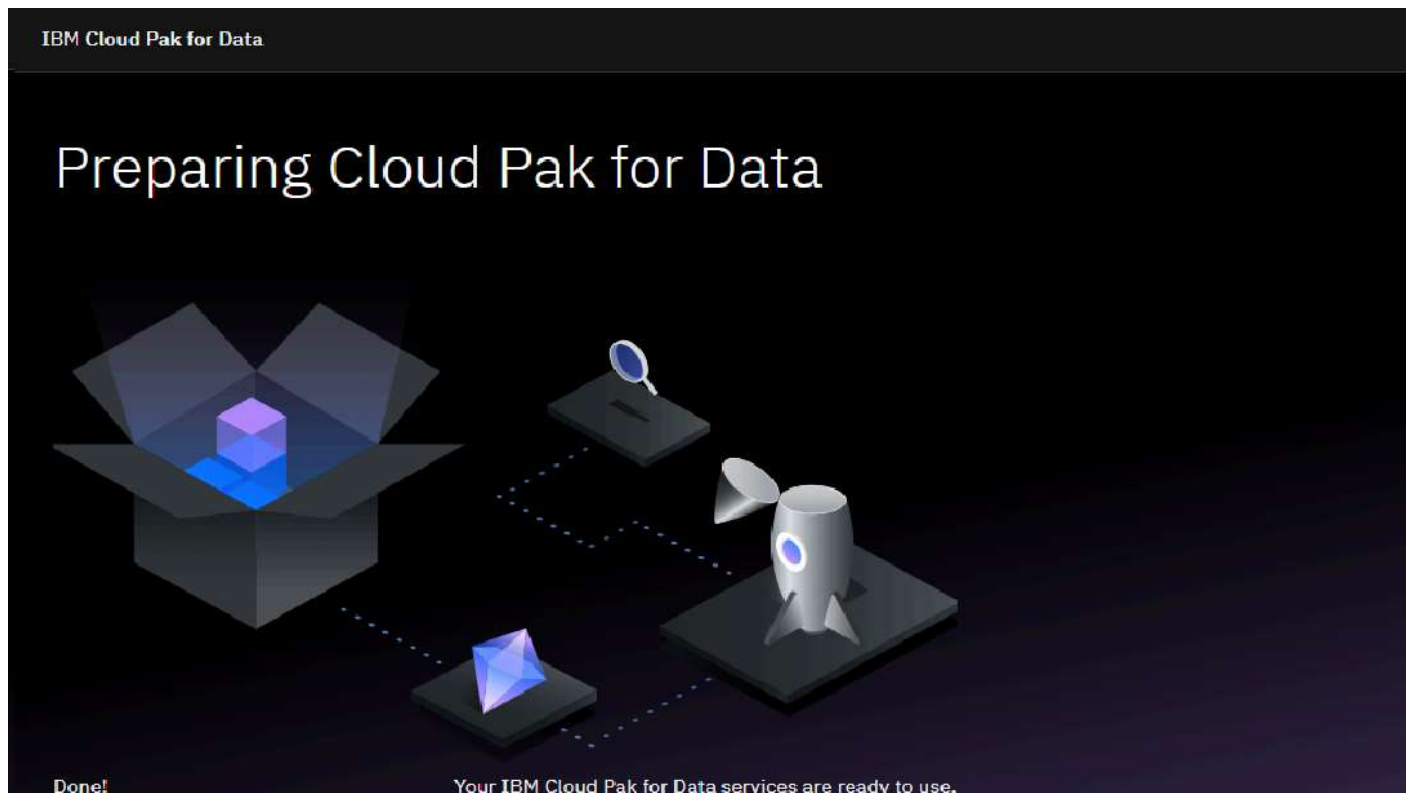
 **Watson Studio in Cloud Pak for Data**

Watson Studio is one of the core services in Cloud Pak for Data as a Service. Build, deploy and manage AI models, and optimize decisions on IBM Cloud Pak for Data.

**Launch in IBM Cloud Pak for Data**



11. You will be redirected to [IBM Cloud Pak for Data](#)



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

# Welcome, Shreya!

## Take a tutorial

Step through implementing a Data fabric use case in a sample project.

→

## Work with data

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

→

## Find what you need

Open this interactive map to find the tools that you need for your tasks.

→

## Quick start



Create data pipelines with DataStage



Build customer profiles with IBM Match 360 with Watson



Catalog and govern data with Watson Knowledge Catalog

## Projects

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Beta testing Week3 lab 2

Nov 21, 2022  
5:28 PM

SK

Python Project

Nov 14, 2022  
11:21 AM

SK

## Notifications



**Online deployment ready**

The online deployment **test** in **sp think** is ready to accept requests

Oct 27, 2022 4:38 PM

## 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 [datapatform.cloud.ibm.com](https://datapatform.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).

# 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?](#)

Log in →

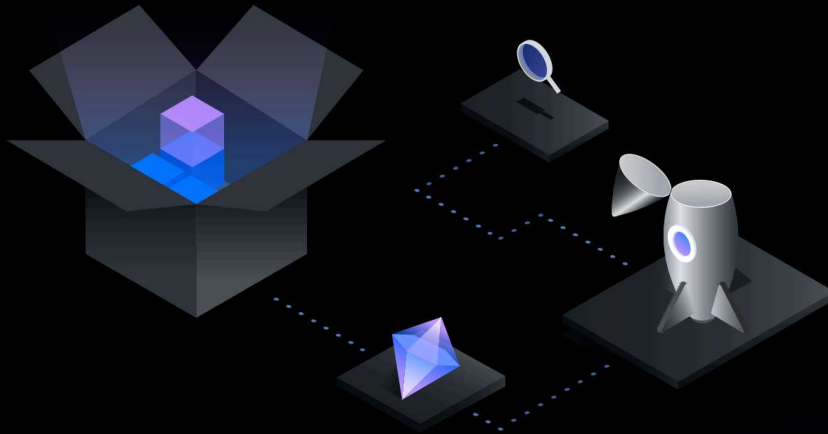
☒ Remember ID

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



Done!

Your IBM Cloud Pak for Data apps are ready to use.

[Go to IBM Cloud Pak for Data](#)

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

## Welcome, Shreya!

### Take a tutorial

Step through implementing a Data fabric use case in a sample project.



### Work with data

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### Quick start



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with DataStage



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Catalog and govern data  
with Watson Knowledge Catalog

### Projects



Beta testing Week3 lab 2

Nov 21, 2022  
5:28 PM



Python Project

Nov 14, 2022  
11:21 AM



### Notifications



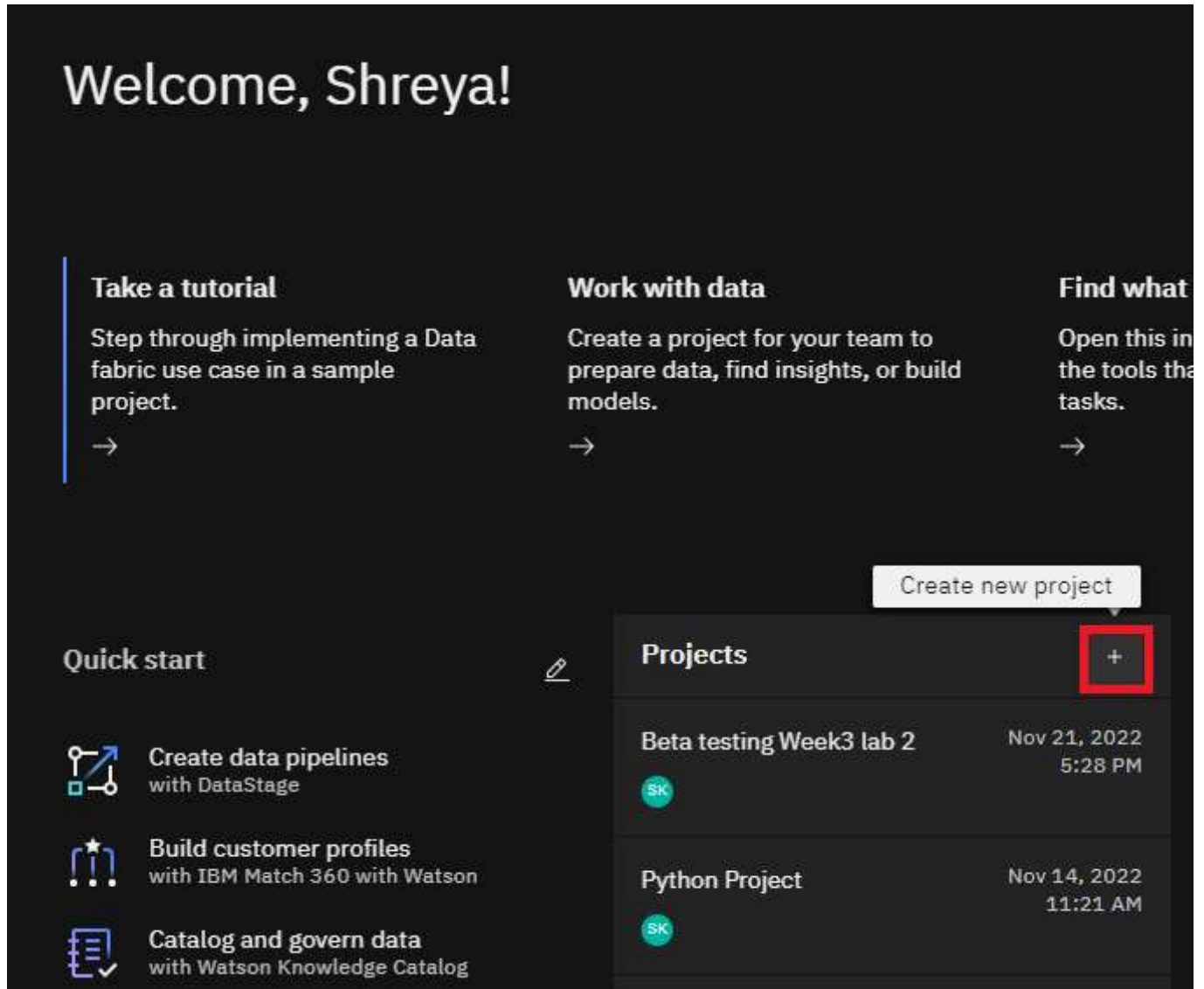
**Online deployment ready**

The online deployment [test](#) in [sp think](#) is ready to accept requests

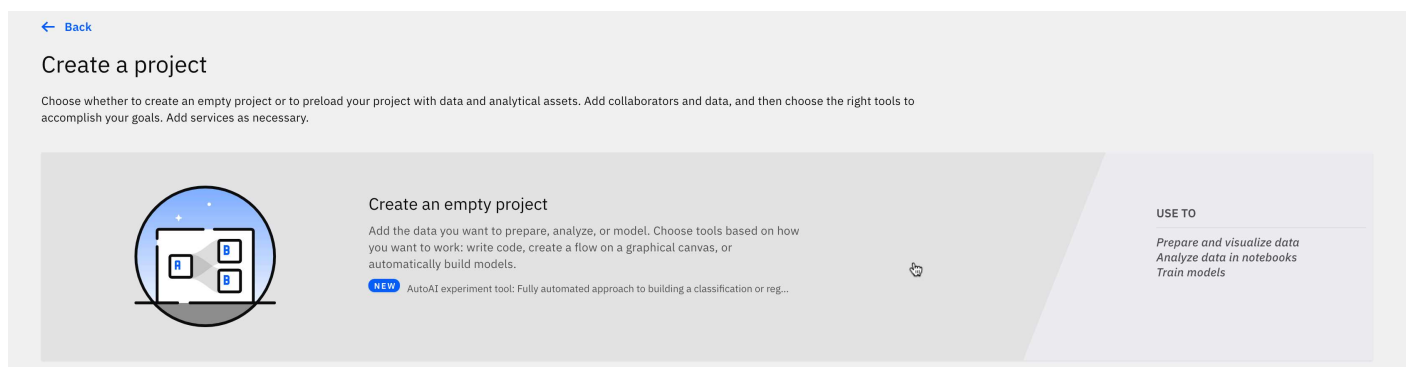
Oct 27, 2022 4:38 PM

# Task C : Create a New Project


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

 IBM Cloud Pak for Data

## 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

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

 IBM Cloud Pak for Data

 Sandip Saha Joy's Account  

Services catalog /

## Cloud Object Storage


Author: IBM • Date of last update: Sep 23, 2020 • [Docs](#) • [API Docs](#)

Create

About

### Pricing plan

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

Plan	Features	Pricing
Lite	<b>1 COS Service Instance</b> Storage up to 25 GB/month Up to 2,000 Class A (PUT, COPY, POST, and LIST) requests per month Up to 20,000 Class B (GET and all others) requests per month Up to 10 GB/month of Data Retrieval Up to 5GB of egress (Public Outbound) Applies to aggregate total across all storage bucket classes  The Lite service plan for Cloud Object Storage includes Regional and Cross Regional resiliency, flexible data classes, and built in security.  Lite plan services are deleted after 30 days of inactivity.	Free 
Standard	There is no minimum fee, so you pay only for what you use.	<a href="#">See pricing details</a>


### Configure your resource

Service name

Cloud Object Storage-iu

Select a resource group


Default



Create

View terms

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

 IBM Cloud Pak for Data

## New project

### Define project details

Name

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**.

 IBM Cloud Pak for Data  Sandip Saha Joy's Account  53

## New project

### Define project details

Name

Description

### Storage

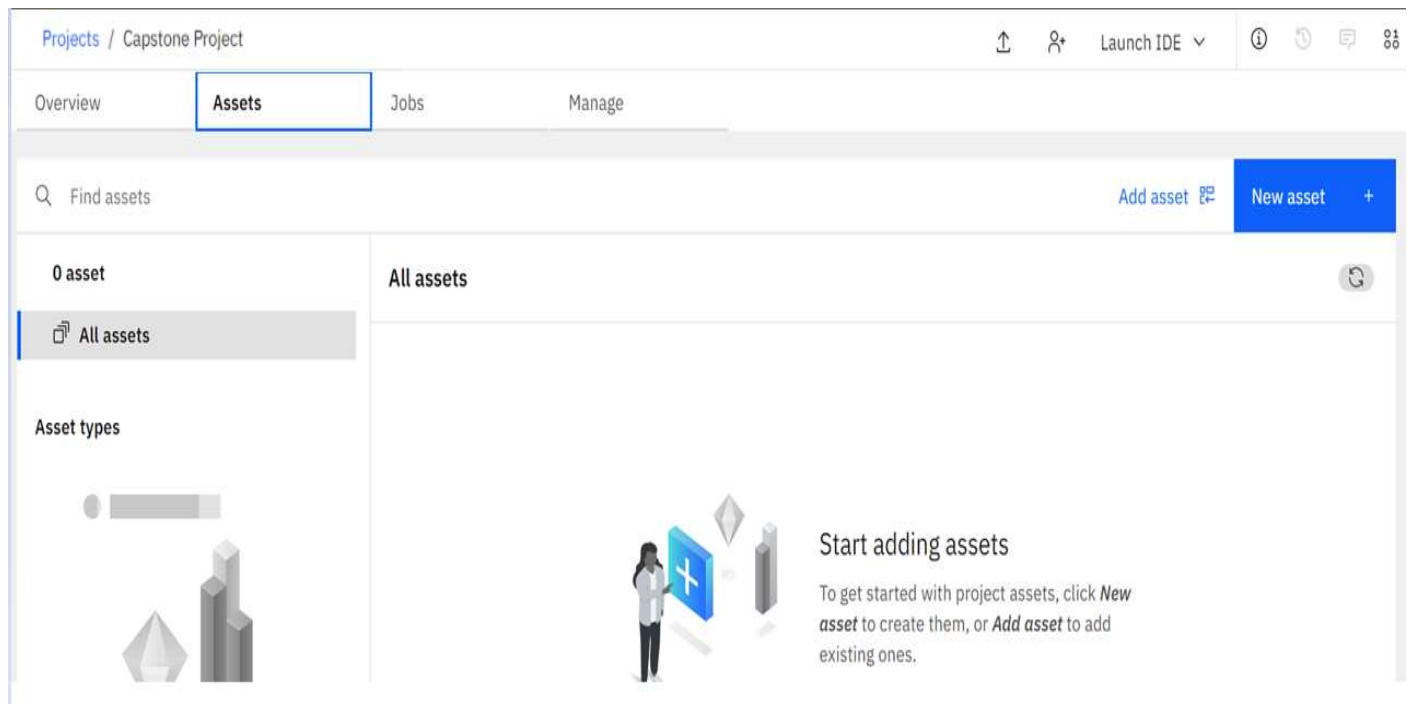
### Choose project options

☐ Restrict who can be a collaborator ⓘ

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

Cancel Create

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




## 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, got to **Projects** under Quick navigation and click on the Capstone project you had created earlier



 IBM Watson Studio

 Search in your workspaces

# Welcome, Shreya!

### Take a tutorial

Step through implementing a Data fabric use case in a sample project.

→

### Work with data

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


→


### Find what you need


Open this interactive guide to find the tools that you need for your tasks.

→

### Quick start

 Create data pipelines with DataStage

 Build customer profiles with IBM Match 360 with Watson

 Catalog and govern data with Watson Knowledge Catalog

### Projects

Capstone

Today at 7:21 PM


SK

Beta testing Week3 lab 2

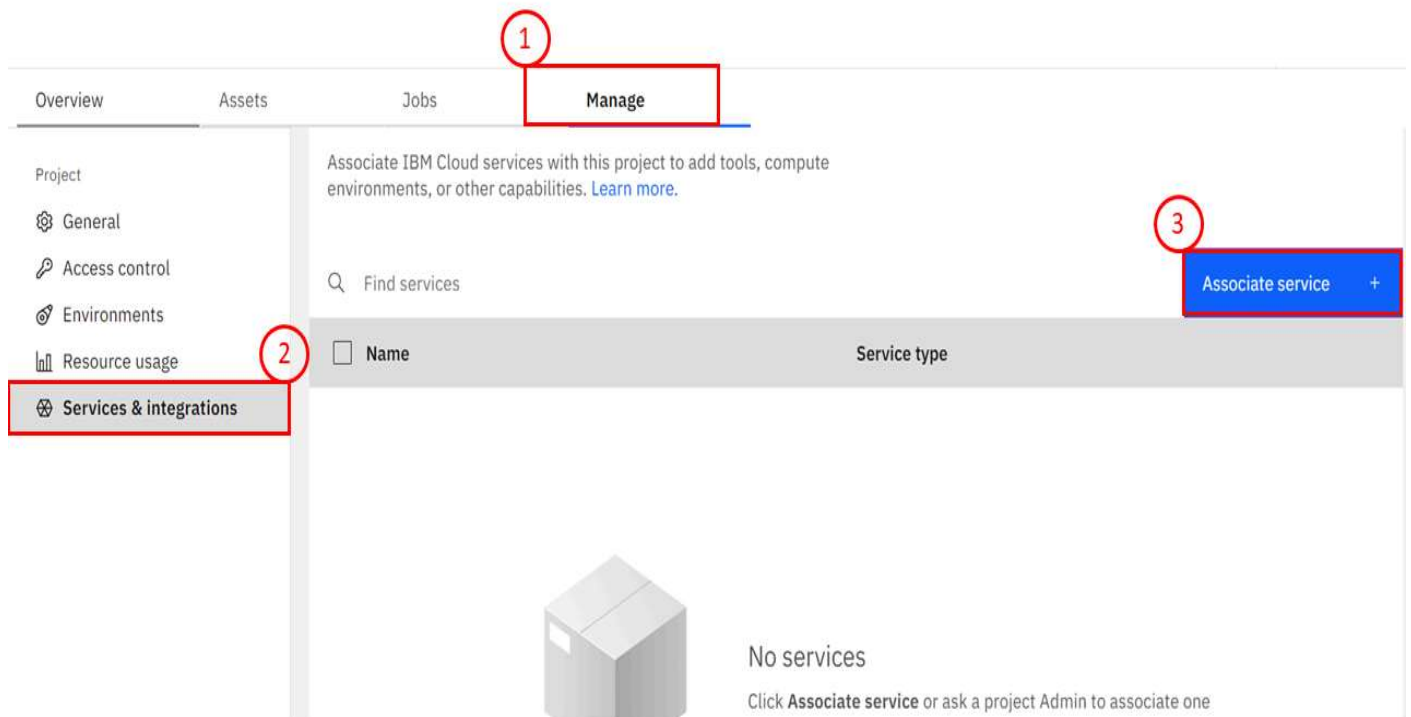
Nov 21, 2022 5:28 PM

SK

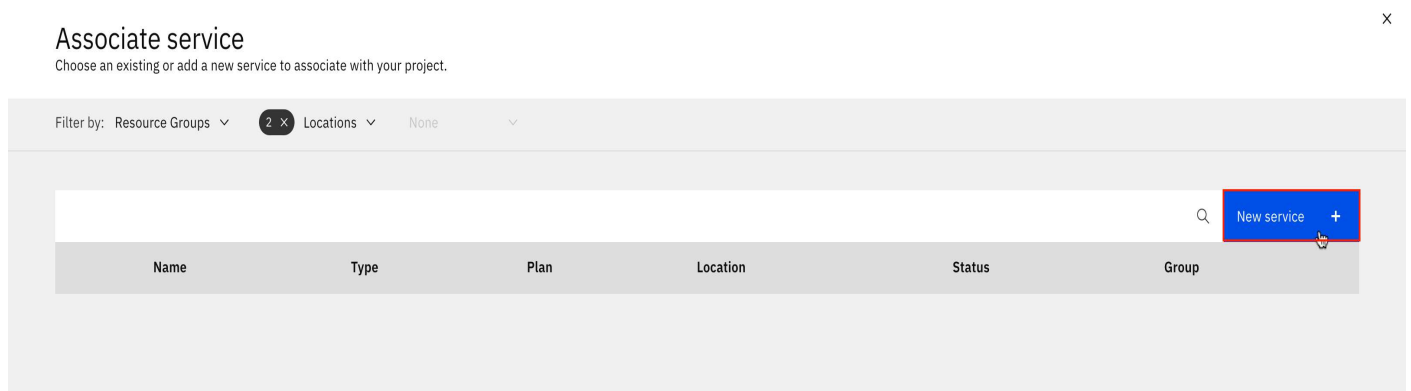
### Notifications

 Completed task

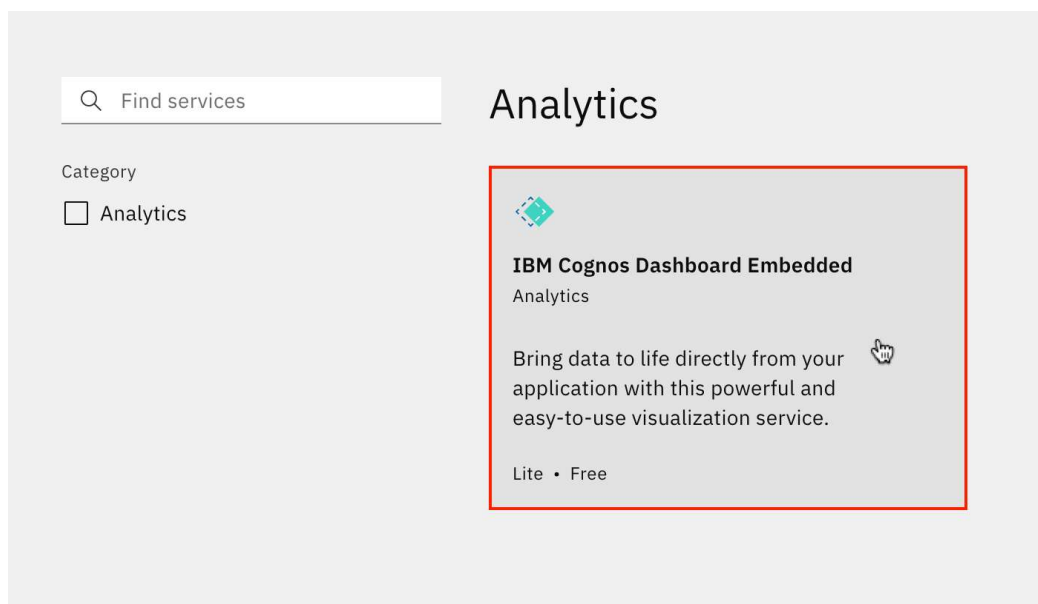
2. Click on **Manage** tab , from the **Services and integrations** section click **Associate service**



### 3. Click **New service**.



### 4. Click **IBM Cognos Dashboard Embedded**.



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

Services catalog /

## IBM Cognos Dashboard Embedded

Author: IBM • Date of last update: Aug 17, 2020 • [Docs](#)

**Create** About

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	<b>50 sessions/month</b>  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	<b>After 50 sessions</b> 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-lh  
Resource group: Default

**Create**

[View terms](#)

6. 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 X Locations 1 X 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

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

## Associate service

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

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

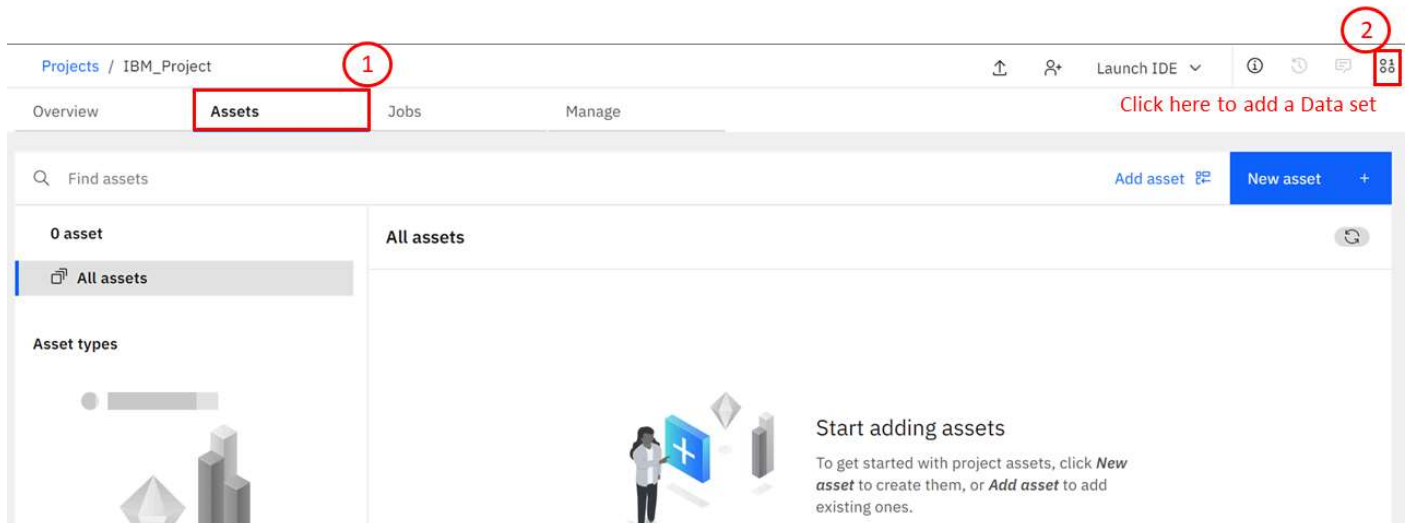


New service +

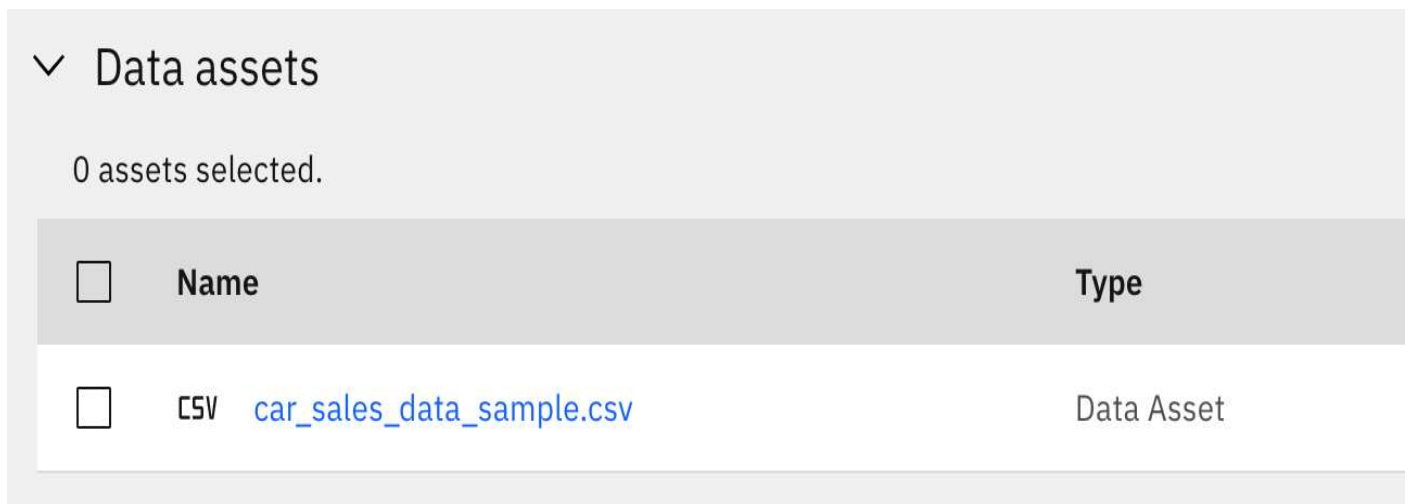
	Name	Type	Plan	Location	Status	Group
<input checked="" type="checkbox"/>	IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded	Lite	Dallas	Associated	Default

## 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**.



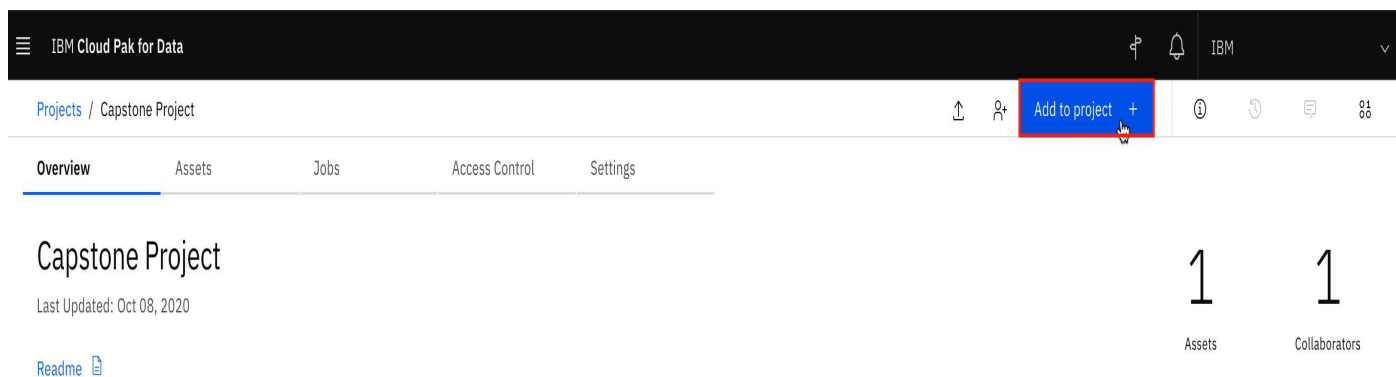
3. Browse to the file download location, select the downloaded **CSV** file, and click **Open**.
4. Once upload completes, **car\_sales\_data\_sample.csv** will appear under **Data assets** section.



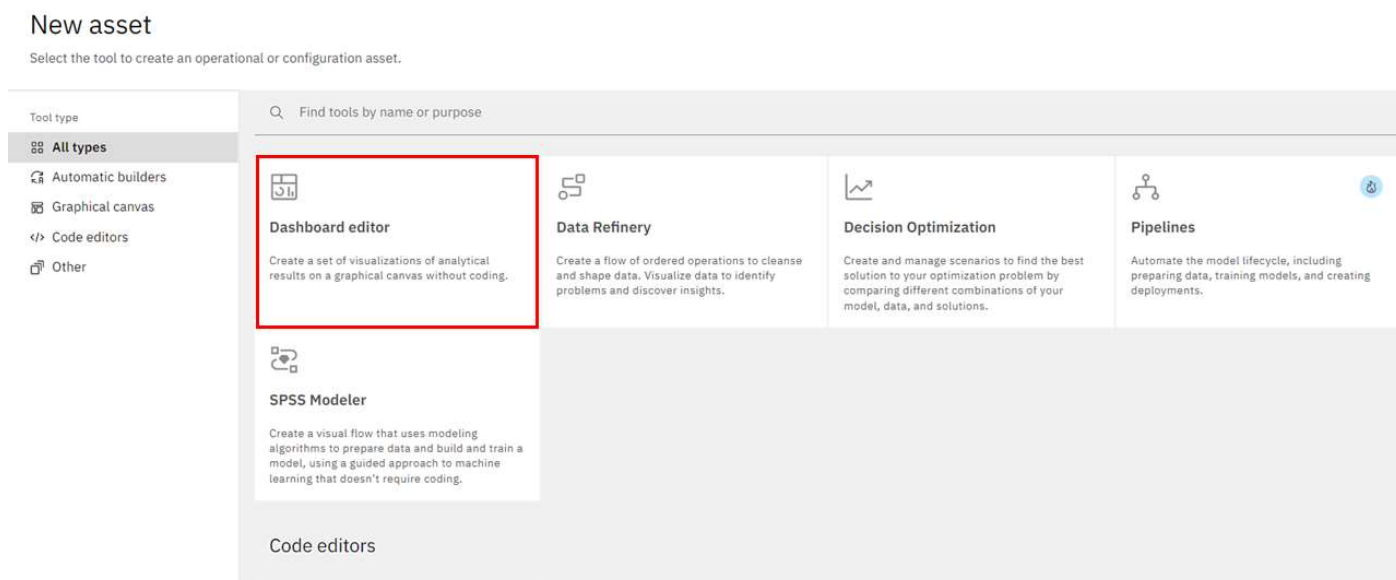
## Exercise 3 : Navigate around CDE UI and Start a New Dashboard with a Template

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**.



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



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

IBM Cloud Pak for Data

IBM

## 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

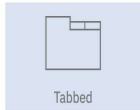
Cancel

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**.

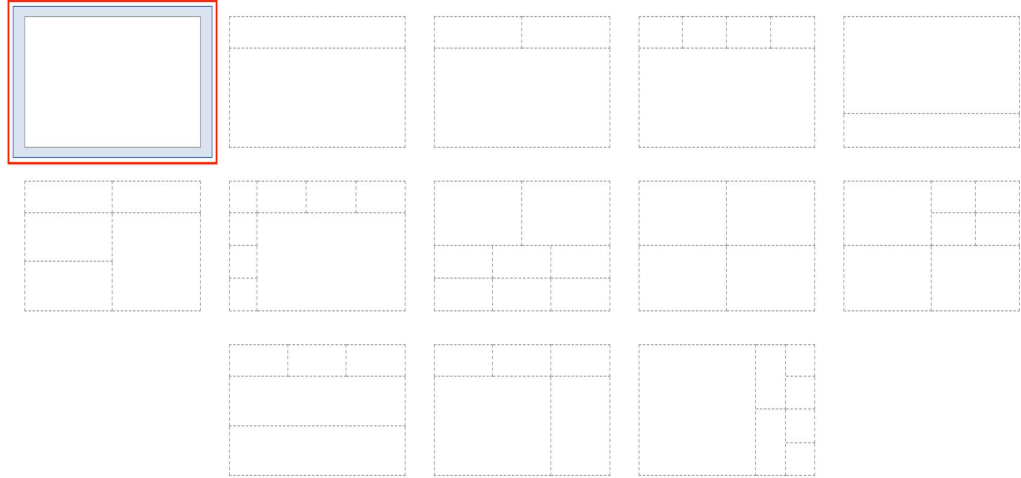
## Select a template

Layout



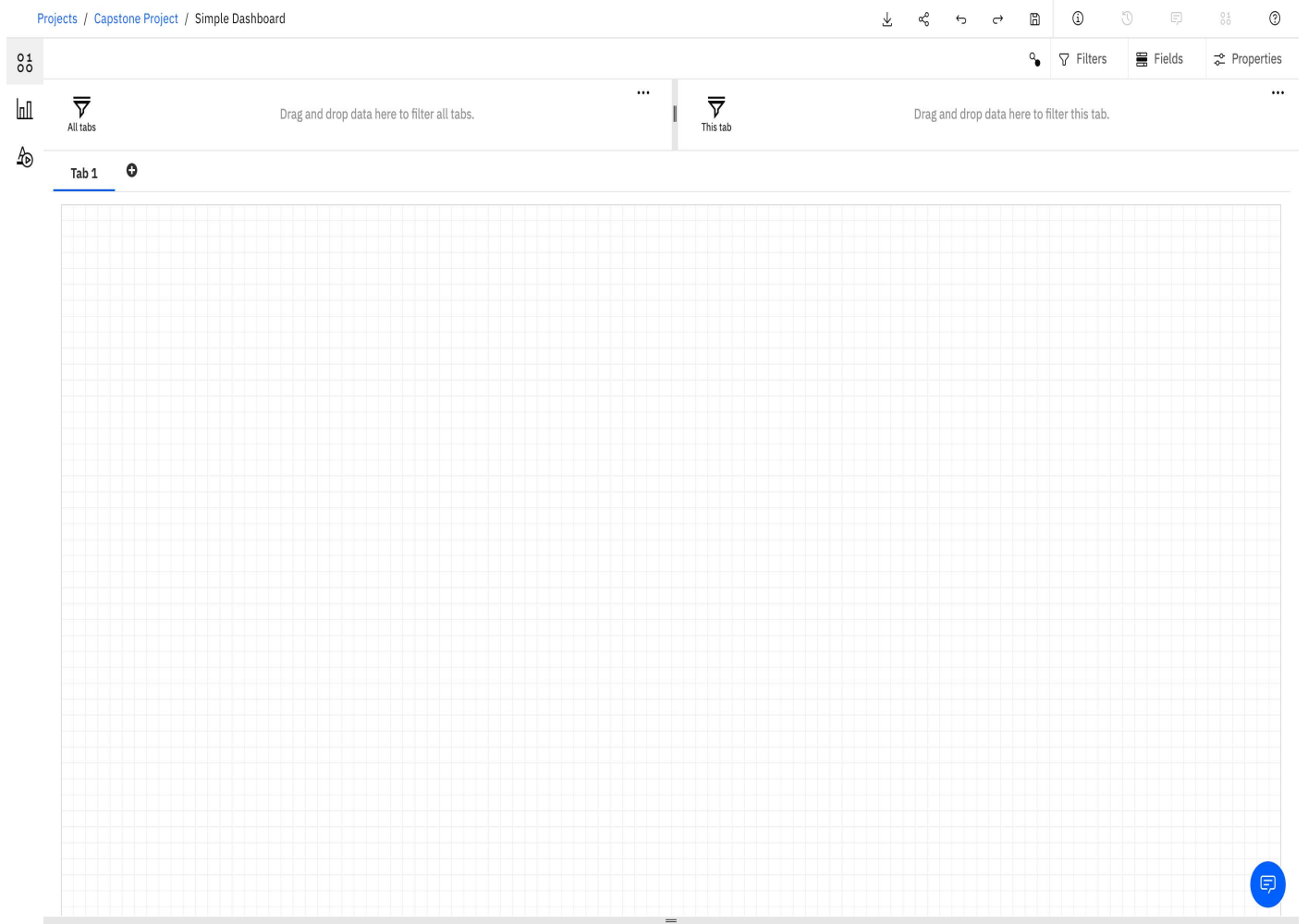
Infographic

Tabbed template

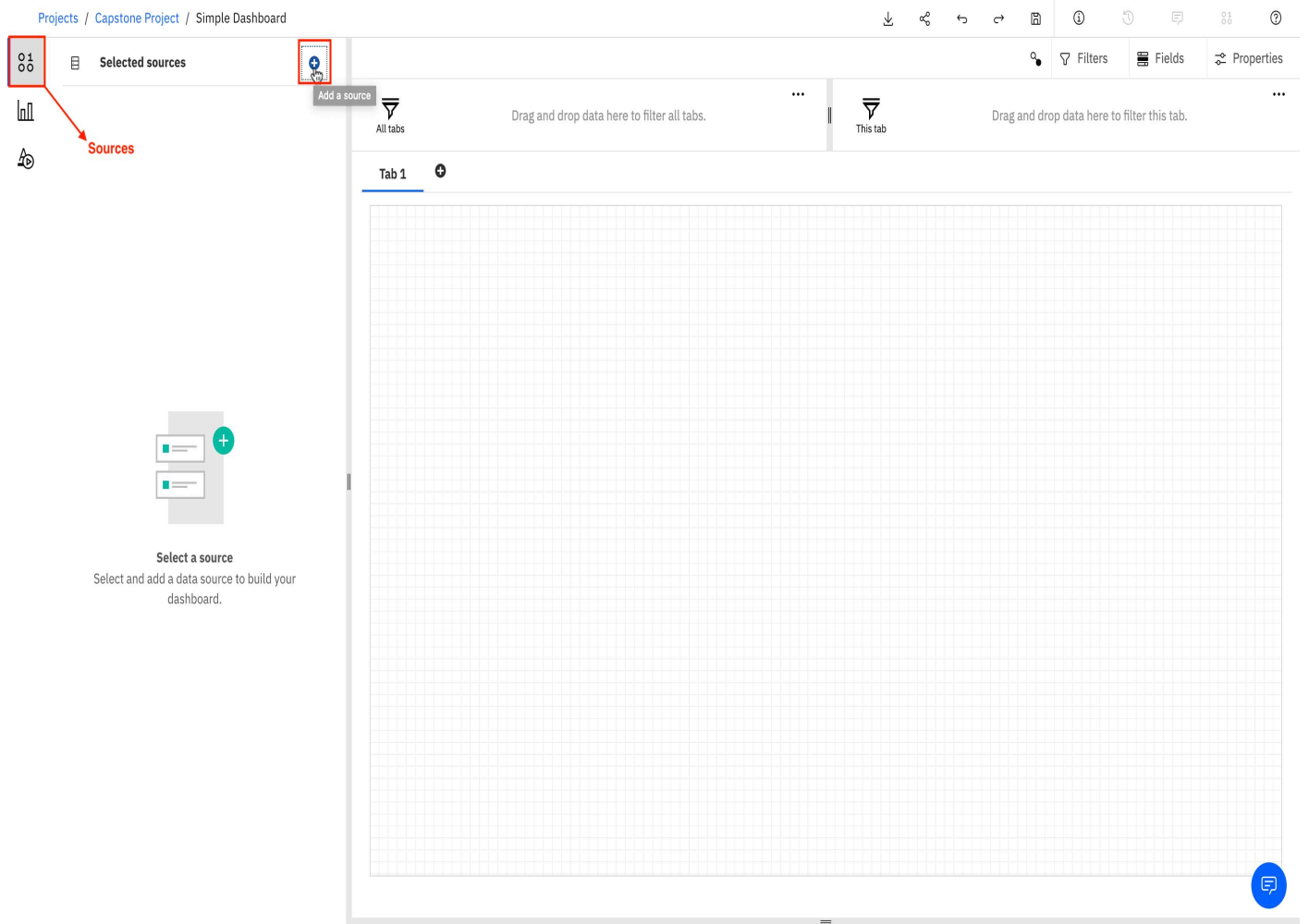


5. Now you have created a new dashboard using the dashboard template.



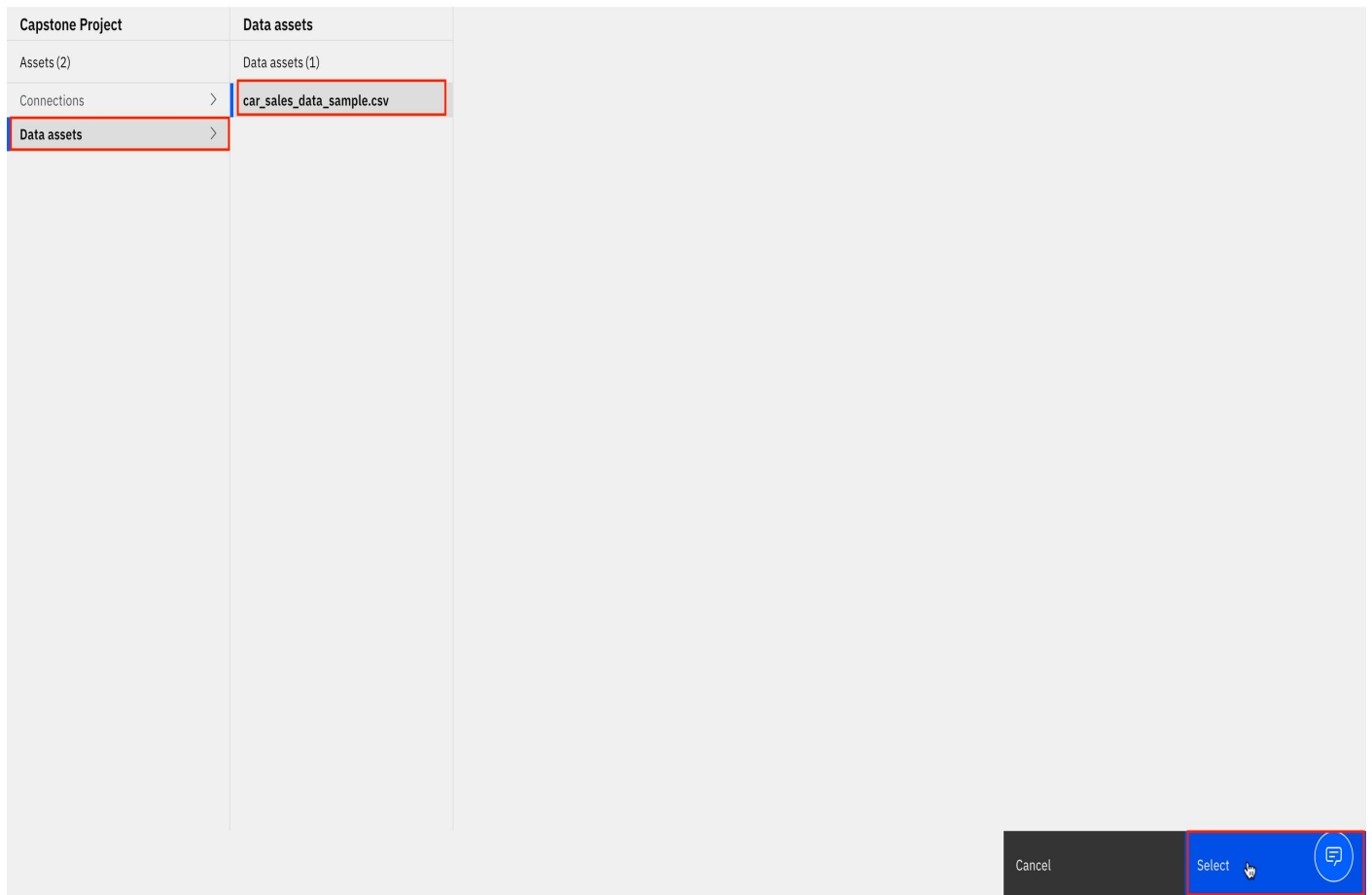


6. Click **Sources** icon from the **Navigation** panel to open the data source panel. Then click **Add a source** icon.

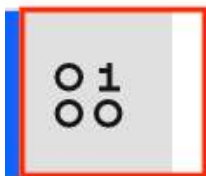


7. Select **Data assets**. Select **car\_sales\_data\_sample.csv** and click **Select**.

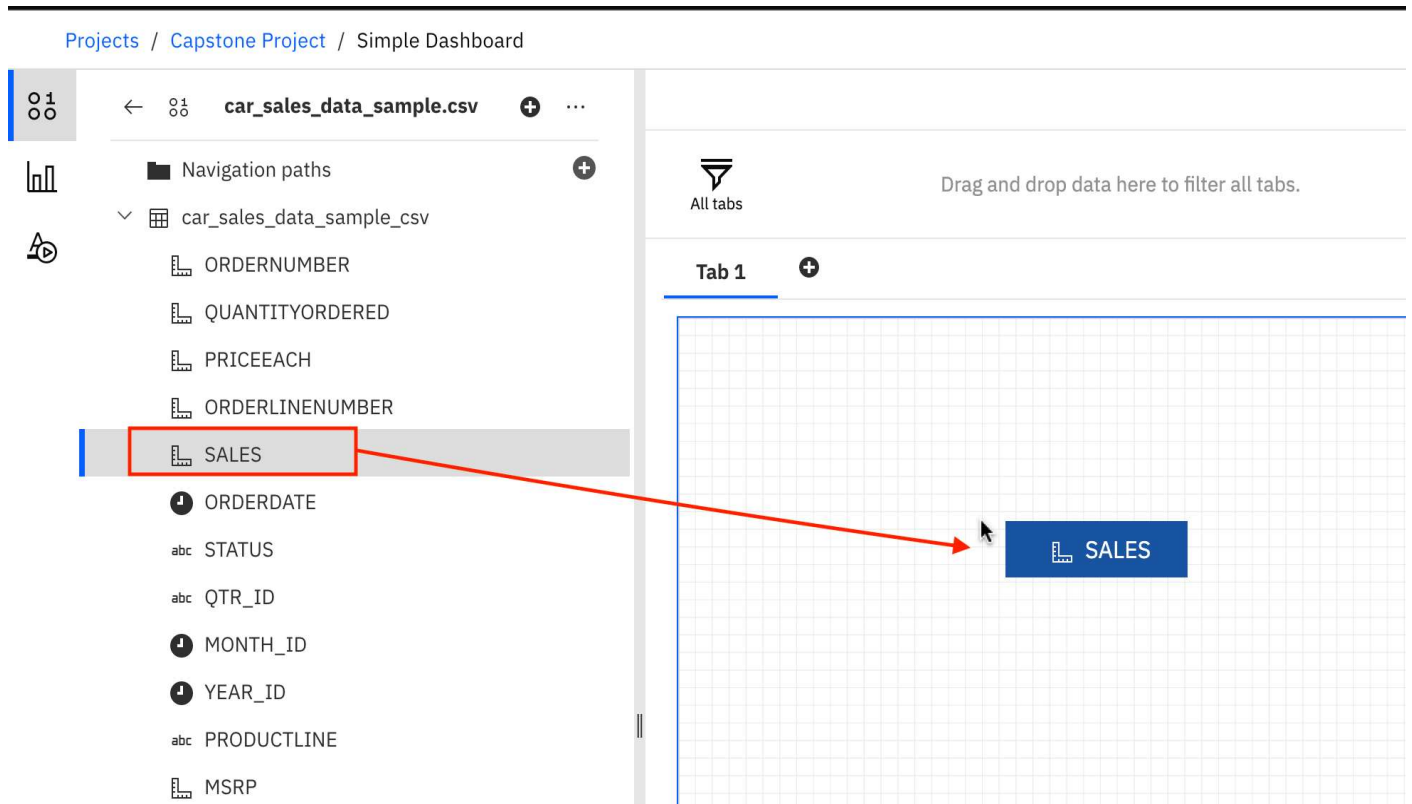
## Select connection source



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)

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- [Sandip Saha Joy](#)

## Other Contributor(s)

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## Changelog

Date	Version	Changed by	Change Description
2023-06-14	1.2	Shreya	Updated screenshots
2022-05-04	1.1	Malika	Updated screenshot
2020-10-07	1.0	Sandip Saha Joy	Initial version created

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