



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

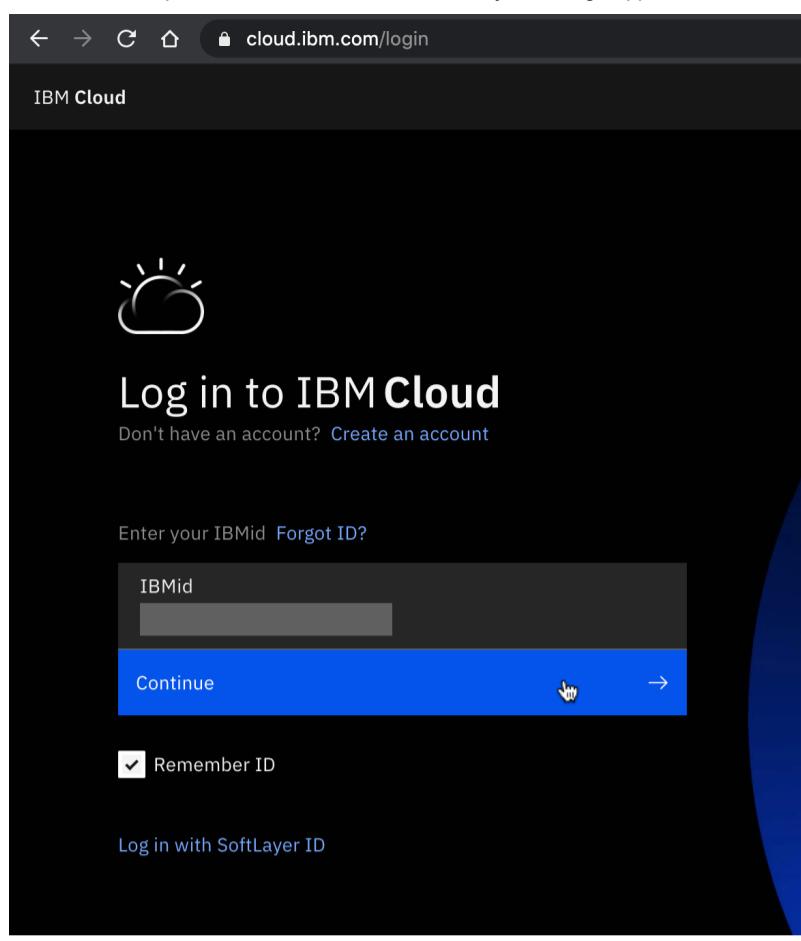
Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

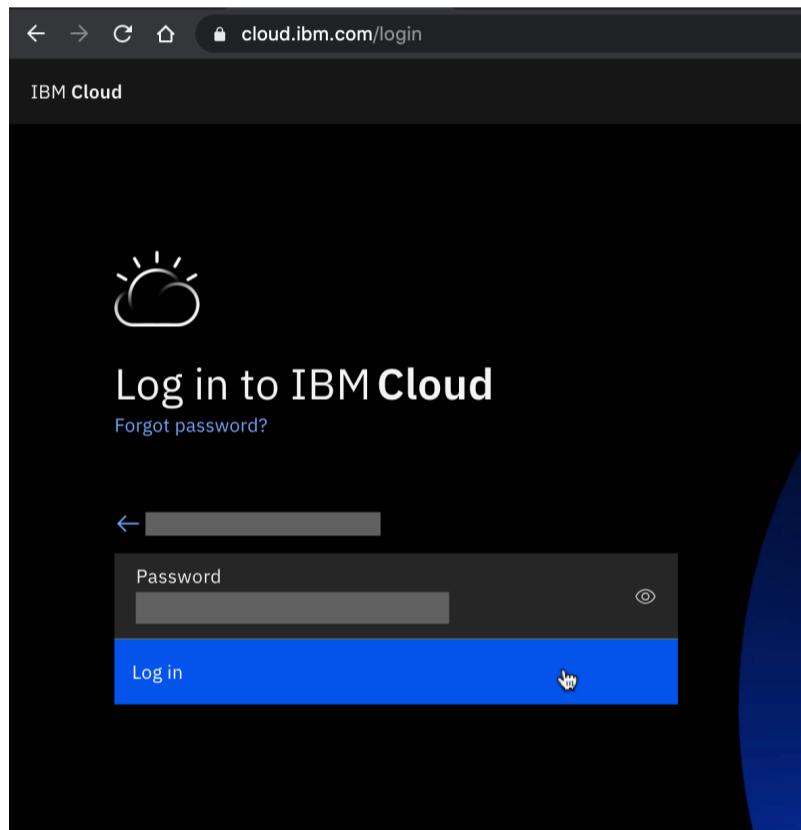
Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

- 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.

The screenshot shows the IBM Cloud dashboard. At the top left is a red-bordered icon representing a navigation menu. To its right is the "IBM Cloud" logo and a search bar. Below the header is a dark sidebar titled "Navigation Menu" containing various icons and links. One link, "Resource summary", is highlighted with a black box. The main content area displays a "Welcome!" message, a "Create a resource" button, and a "Try spinning up an app using starter kits" section with a blue hexagonal icon.

Navigation Menu

Dashboard

Resource summary

Welcome!

Get started with IBM Cloud by creating

Create a resource →

Try spinning up an app using [starter kits](#)

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

The screenshot shows the left sidebar of the IBM Cloud interface. The sidebar has a dark header with the IBM Cloud logo. Below it, there's a list of services and offerings. A red box highlights the 'Watson' section, which includes icons for Watson Studio, Watson Assistant, and Watson Discovery. To the right of the sidebar, the main content area shows a blurred view of the Watson Studio interface.

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.

This screenshot shows the 'Explore our other offerings' section of the IBM website. It features several cards for different services. One card for 'IBM Watson Studio' is highlighted with a red border. This card contains a brief description, a small icon of a person at a desk, and two calls-to-action: 'Try for free' and 'Watch a Demo'. Other visible cards include 'Consult with IBM', 'Engage us now!', and 'Watson Assistant'.

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

IBM Cloud Pak for Data

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 →

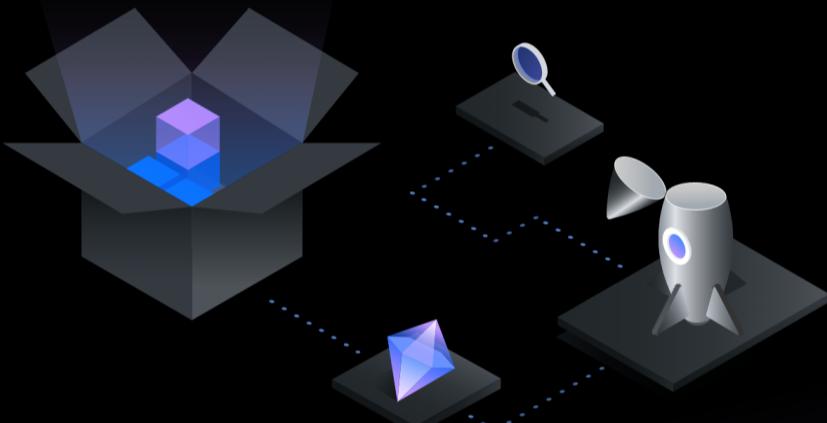
Activate your IBM Cloud account

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**.

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

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 +
View all (0)

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.
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?](#)

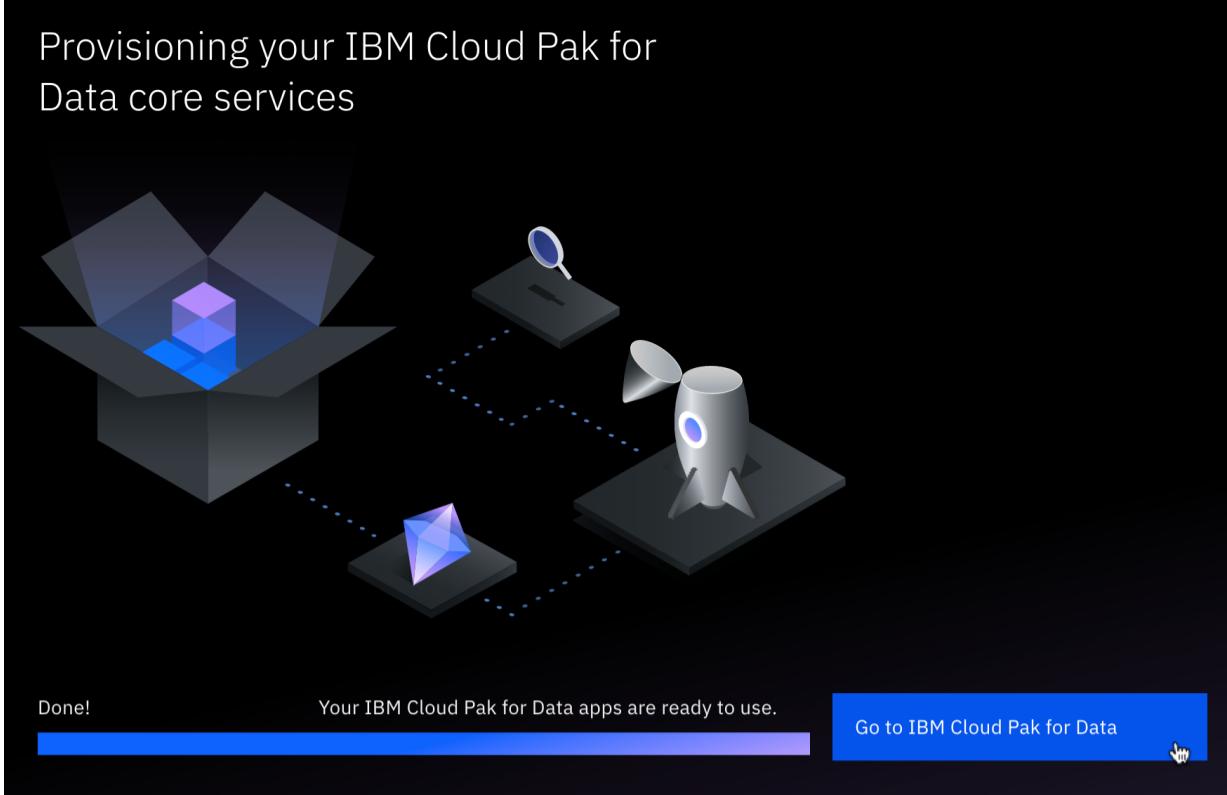
Remember ID

Log in →

You will log into Dallas ▾

- Dallas
- London
- Frankfurt
- Tokyo

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**.

[← 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**.

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**

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

IBM Cloud Pak for Data

Sandip Saha Joy's Account

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.

Cancel
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

All assets

Asset types

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

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

The screenshot shows the main dashboard of IBM Cloud Pak for Data. At the top, it says "Welcome, Sandip saha!". Below that 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". On the left side, there's a sidebar with "Quick navigation" containing "Projects" (which is highlighted with a red box and has a hand cursor icon) and "Deployment spaces". The main content area is titled "Overview" and includes a "Notifications" section.

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

The screenshot shows the "Projects" page. At the top, it says "IBM Cloud Pak for Data" and "Projects". Below that is a search bar with the placeholder "Which project are you looking for?". The main area lists projects with their names. The "Capstone Project" is highlighted with a red box and has a hand cursor icon over it.

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

The screenshot shows the "Manage" tab selected in the top navigation bar. On the left, there's a sidebar with "Project" and several tabs: "General", "Access control", "Environments", "Resource usage", and "Services & integrations" (which is highlighted with a red box and has a hand cursor icon). In the main content area, there's a section titled "Associate IBM Cloud services with this project to add tools, compute environments, or other capabilities." It includes a "Find services" search bar and a table with columns "Name" and "Service type". A large blue button at the bottom right is labeled "Associate service" with a plus sign. There's also a note saying "No services" and "Click Associate service or ask a project Admin to associate one".

4. Click **New service**.

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

Name	Type	Plan	Location	Status	Group

Filter by: Resource Groups ▾ 2 × Locations ▾ None ▾

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 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	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-lh
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

Name	Type	Plan	Location	Status	Group
<input checked="" type="checkbox"/> IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded	Lite	Dallas	◆ Not associated	Default

Associate service Cancel

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

The screenshot shows the 'Associate service' page with a single service listed:

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' page with the 'Assets' tab selected (circled in red). A red box highlights the 'Click here to add a Data set' button in the top right. A red callout box points to the 'Start adding assets' section, which includes a person icon holding a plus sign over a screen and text instructions.

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 with the following table:

<input type="checkbox"/>	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.

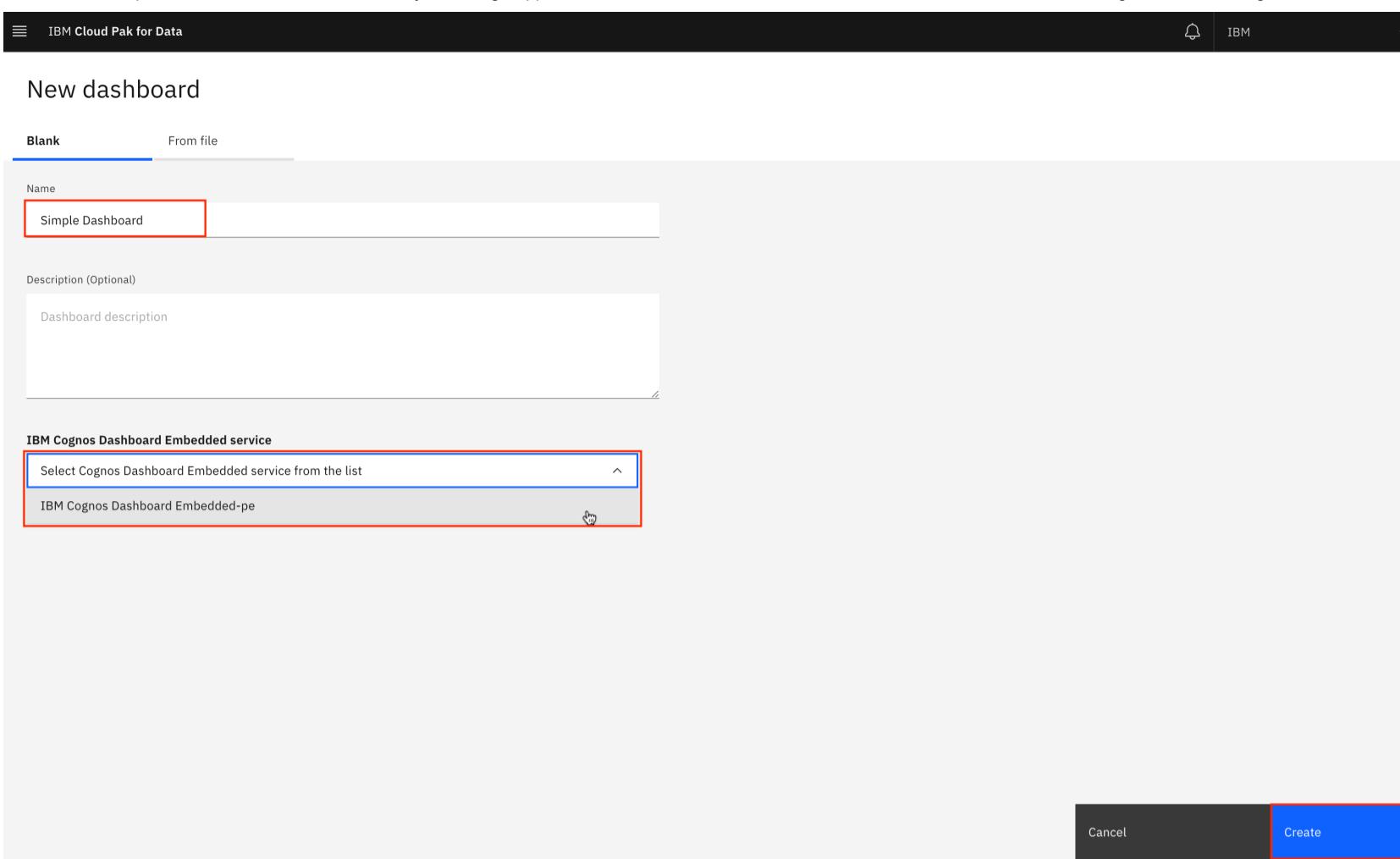
1. On the **Overview** page of Capstone Project project, click **New asset**.

The screenshot shows the 'Overview' tab selected in the top navigation bar. The main content area displays the 'Capstone Project' details, including a 'Last Updated: Oct 08, 2020' message. Below the project name, there are two large numbers: '1' under 'Assets' and '1' under 'Collaborators'. At the bottom right of the main area, there is a 'Readme' link with a document icon. The top right corner features several small icons for navigation and notifications.

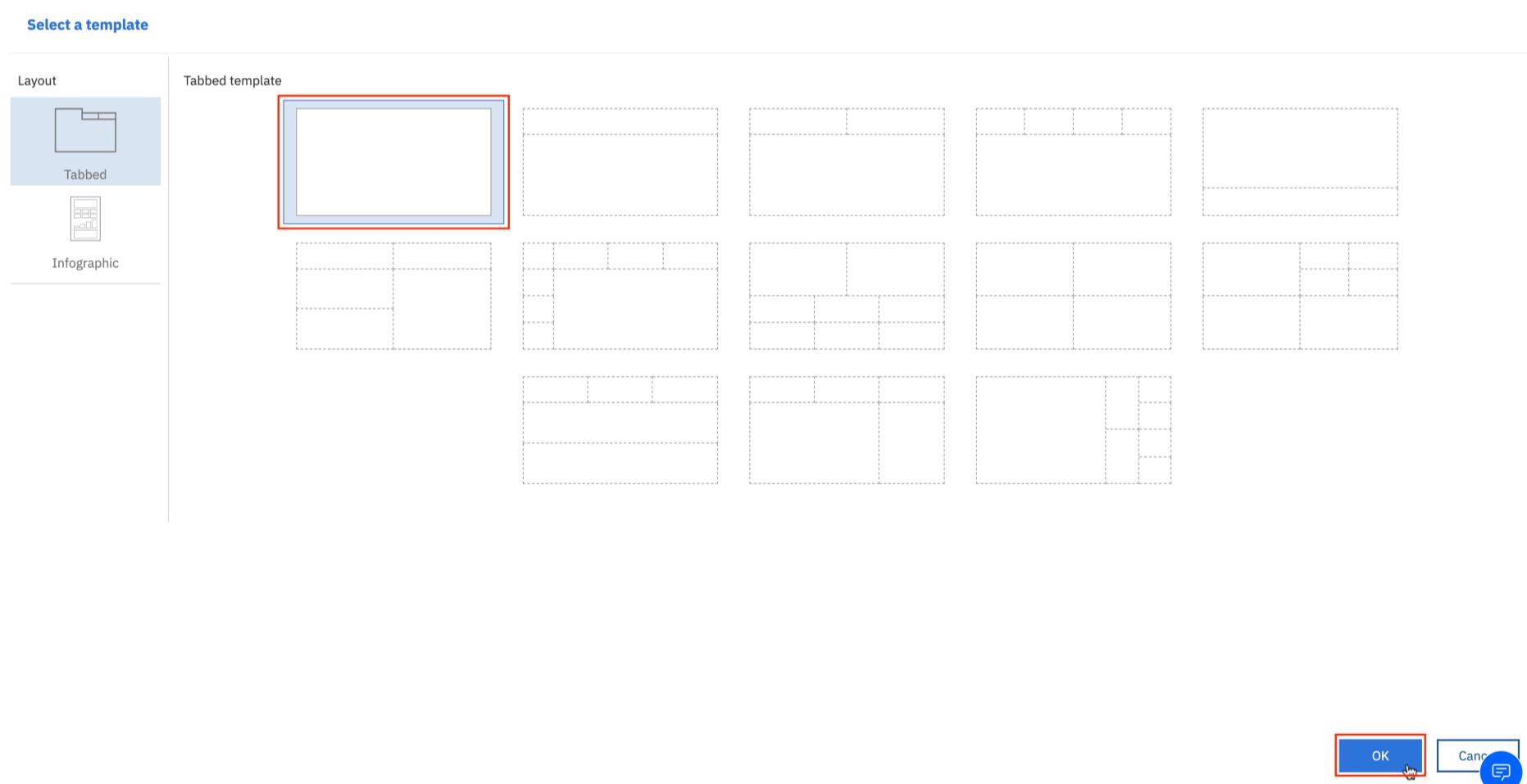
2. Scroll down and select **Dashboard Editor**.

The screenshot shows the 'New asset' creation interface. On the left, a sidebar lists 'Tool type' categories: 'All types' (selected), 'Automatic builders', 'Graphical canvas', 'Code editors', and 'Other'. The main area contains a search bar 'Find tools by name or purpose'. Below the search bar are four tool cards: 'Dashboard editor' (highlighted with a red box), 'Data Refinery', 'Decision Optimization', and 'Pipelines'. Each card has a brief description and a small icon. At the bottom of the main area, there is a section titled 'Code editors'.

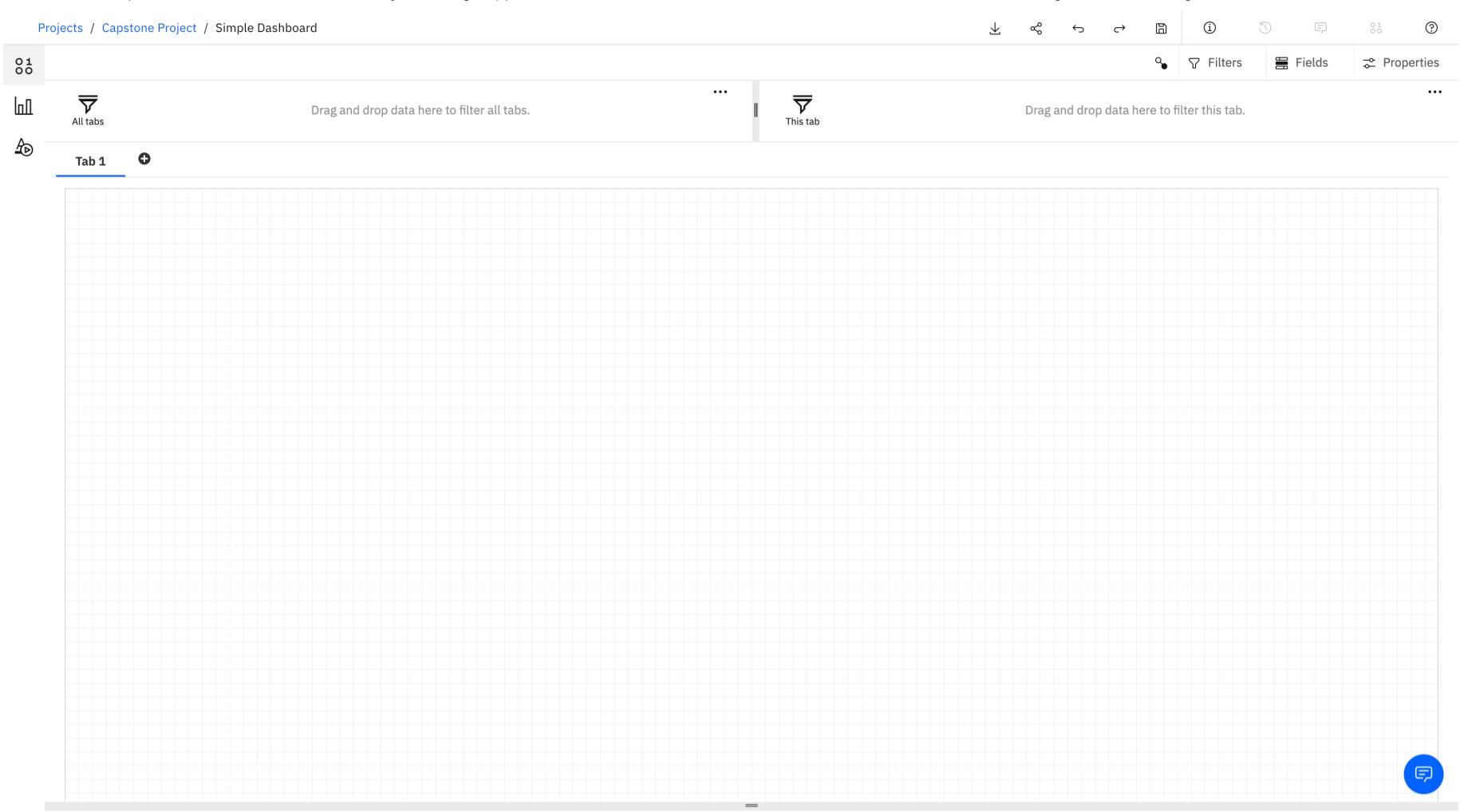
3. Name the dashboard as **Simple Dashboard**. Then select a **Cognos Dashboard Embedded service** from the list and click **Create**.



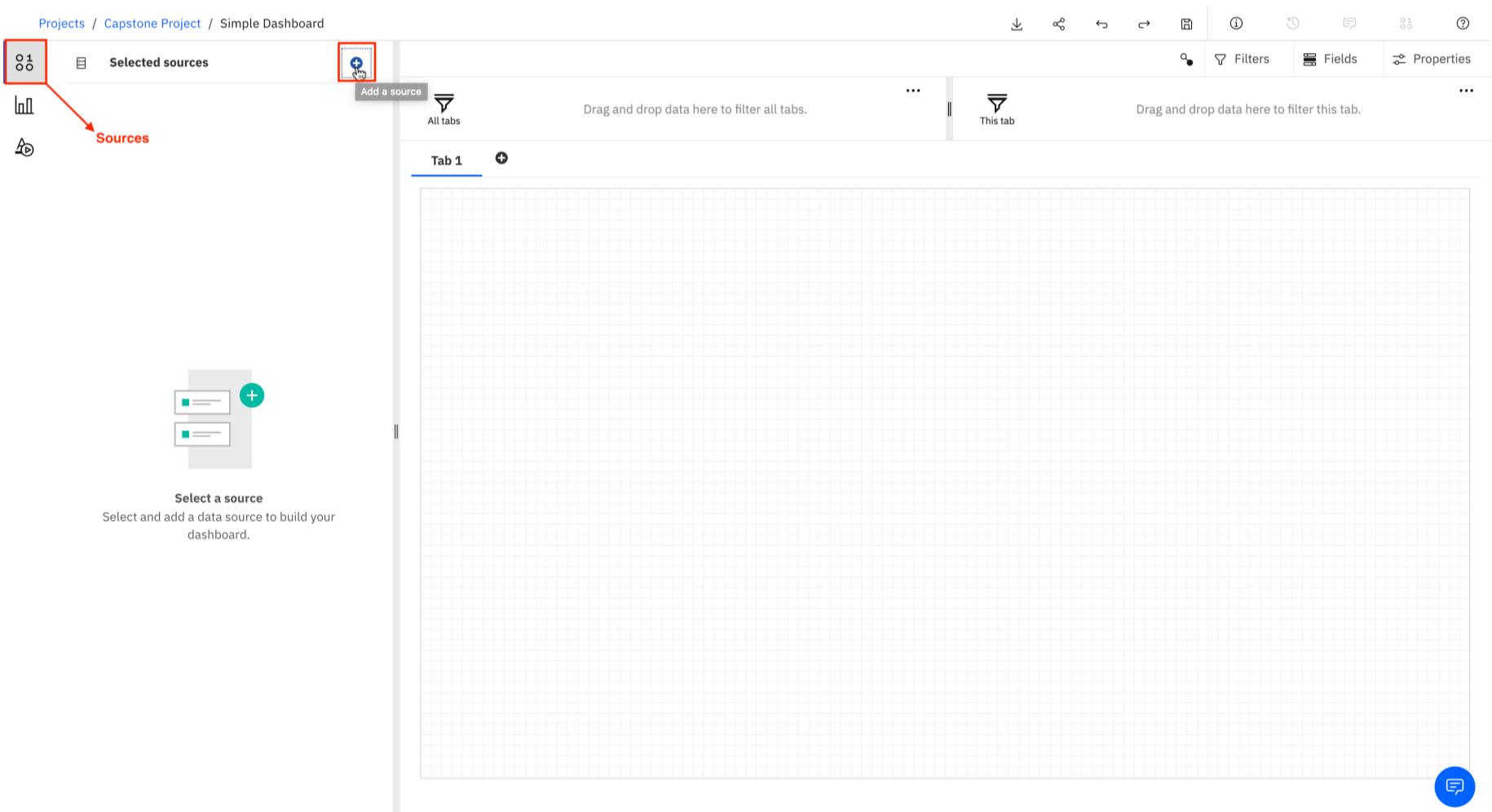
4. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **one-panel template**. Click **OK**.



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.

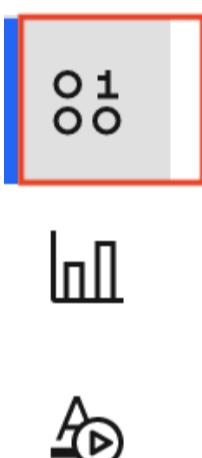


7. Select **Data assets**. Select **car_sales_data_sample.csv** and click **Select**.

Select connection source

The screenshot shows a 'Select connection source' dialog box. On the left, there's a tree view under 'Capstone Project' with 'Assets (2)' and 'Connections'. Under 'Assets (2)', 'Data assets' is expanded, showing 'car_sales_data_sample.csv' which is highlighted with a red box. At the bottom right of the dialog is a blue 'Select' button with a white hand cursor 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 'Data Source' panel on the left and a 'Simple Dashboard' on the right. In the Data Source panel, 'car_sales_data_sample.csv' is expanded, and 'SALES' is highlighted with a red box. A red arrow points from this highlighted 'SALES' to the 'Tab 1' area of the dashboard. The dashboard has a grid and a blue 'SALES' button.

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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