

# 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

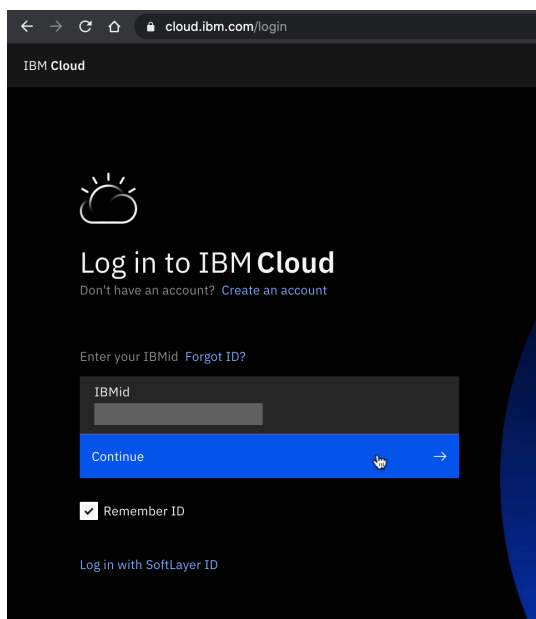
## Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

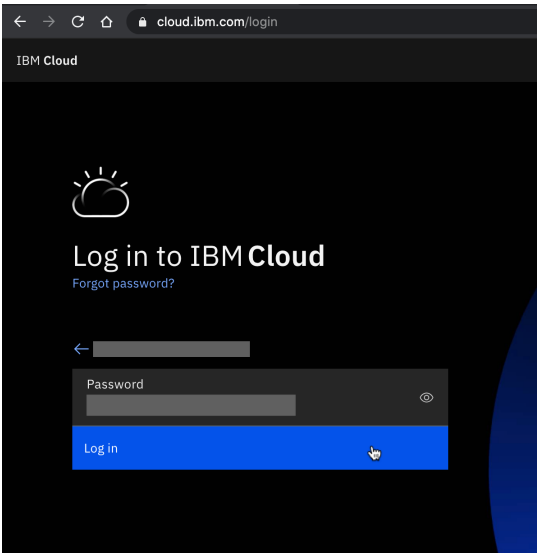
### Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

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

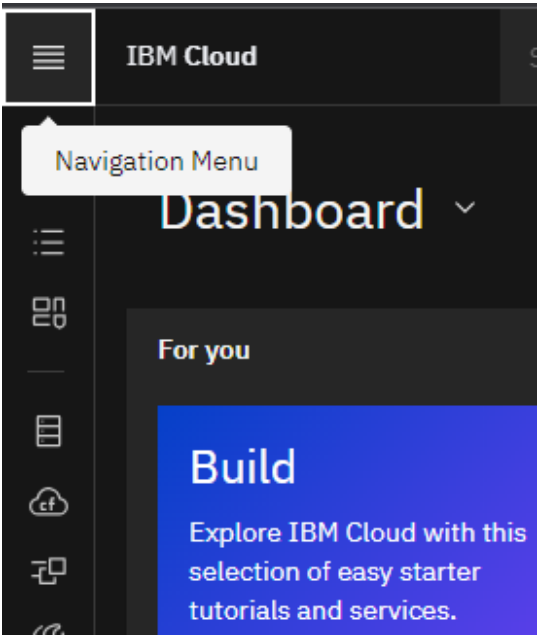
1. Go to [cloud.ibm.com/login](https://cloud.ibm.com/login).
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



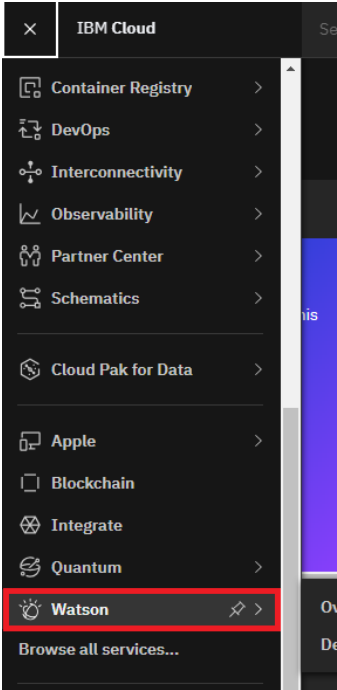
3. Enter your **password** and click **Log in**.



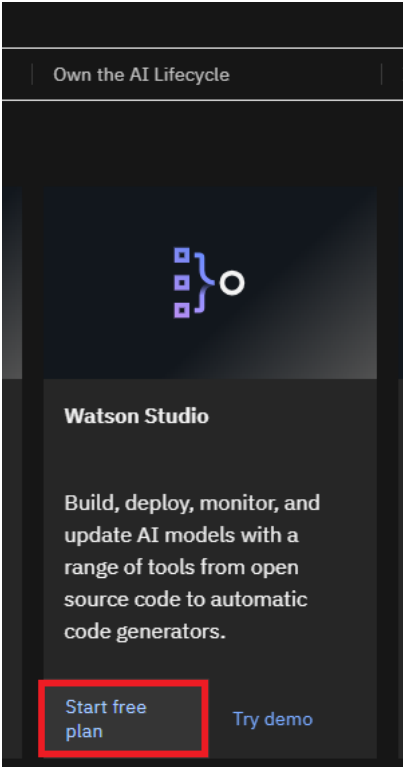
4. Click **Navigation Menu Icon** on the top left side.



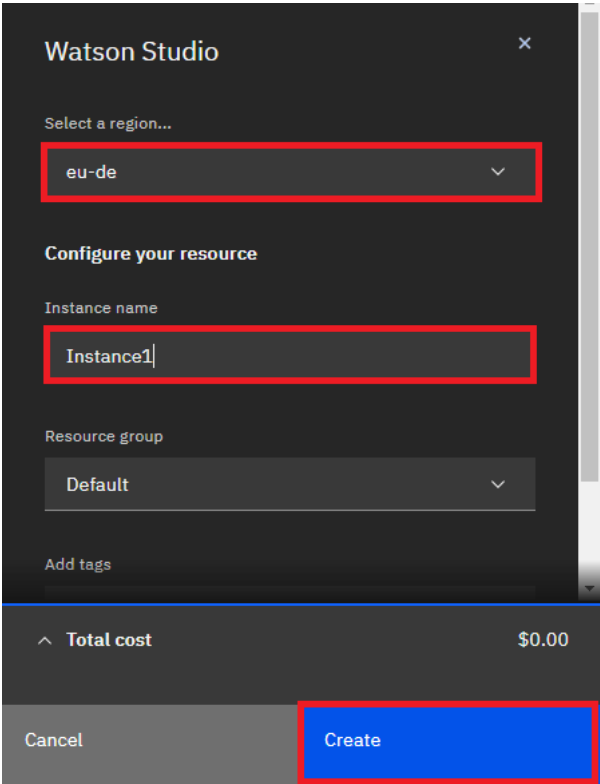
5. From the navigation Menu sidebar, click **Watson**.



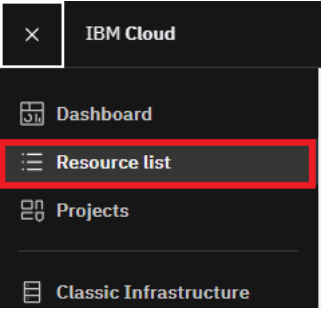
6. Now from the section **All Services**, click Watson Studio **Start free plan**. You will see a dialog box to enter the region and the name of your Watson Studio instance.



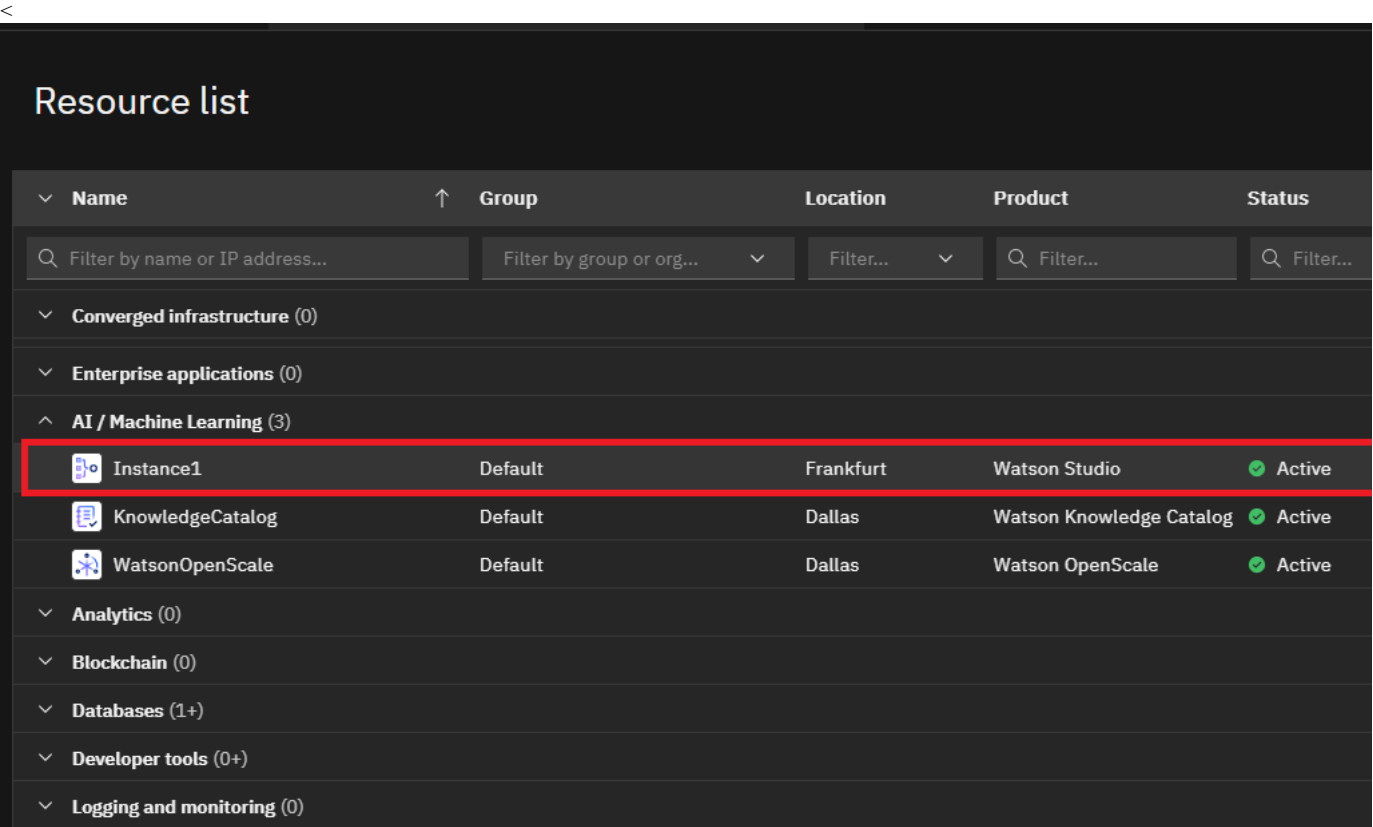
7. Select a **region** matching the region of your IBM Cloud account and provide a name for your Watson Studio instance. Click on the Create button.



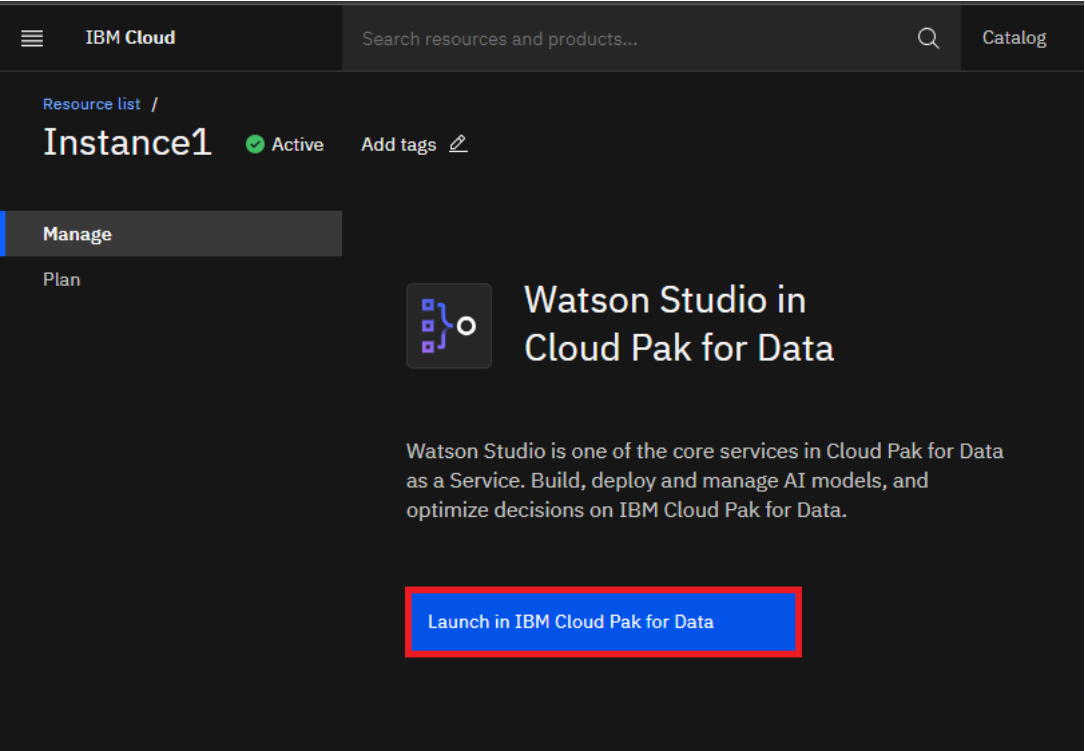
8. You will be redirected to IBM Cloud Pak ([dataplatfom.cloud.ibm.com](https://dataplatfom.cloud.ibm.com)) for Data platform. In case you are not redirected to IBM Cloud Pak page, you need to go to the Resource List from the Navigation Menu.



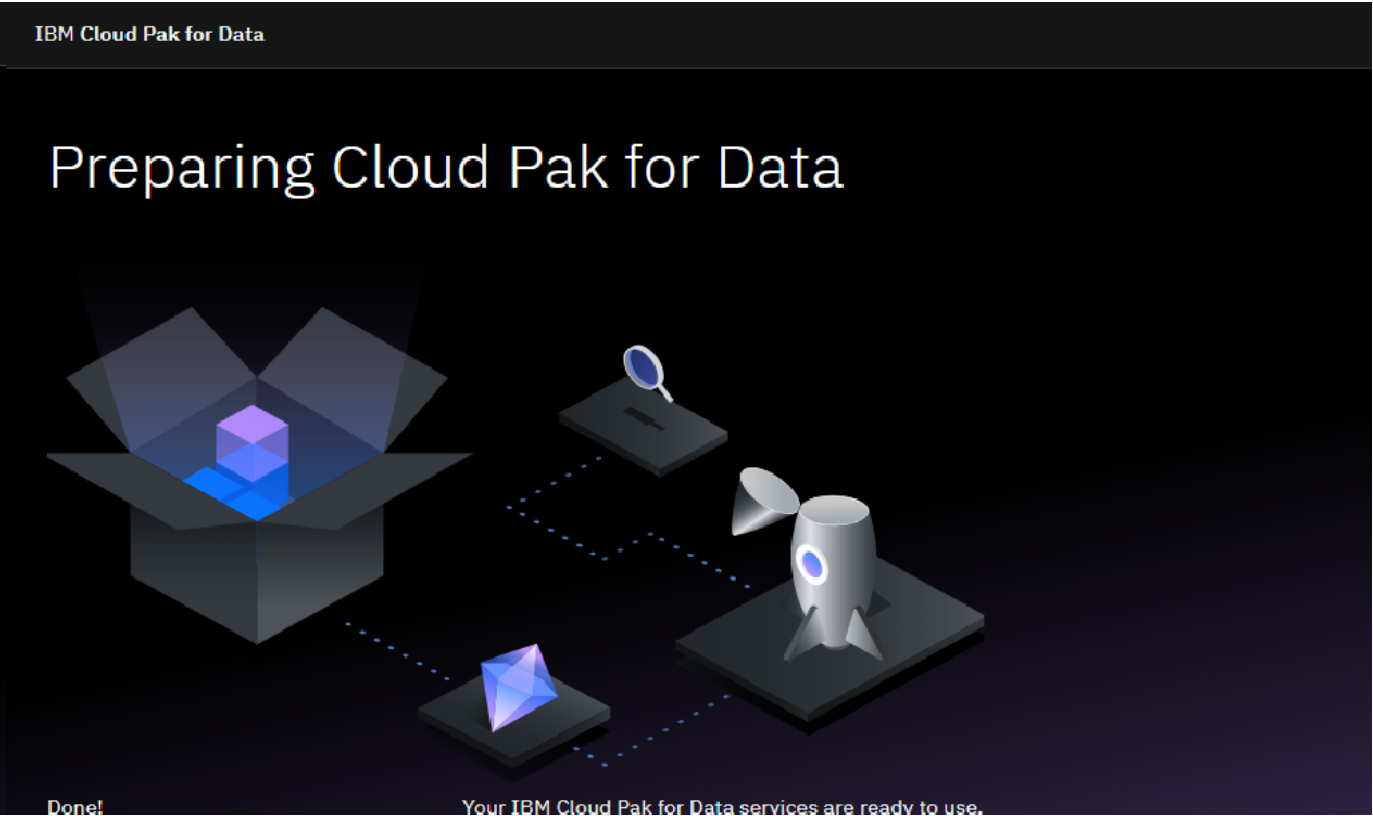
9. Select your Watson Studio instance from the AI/Machine Learning section.



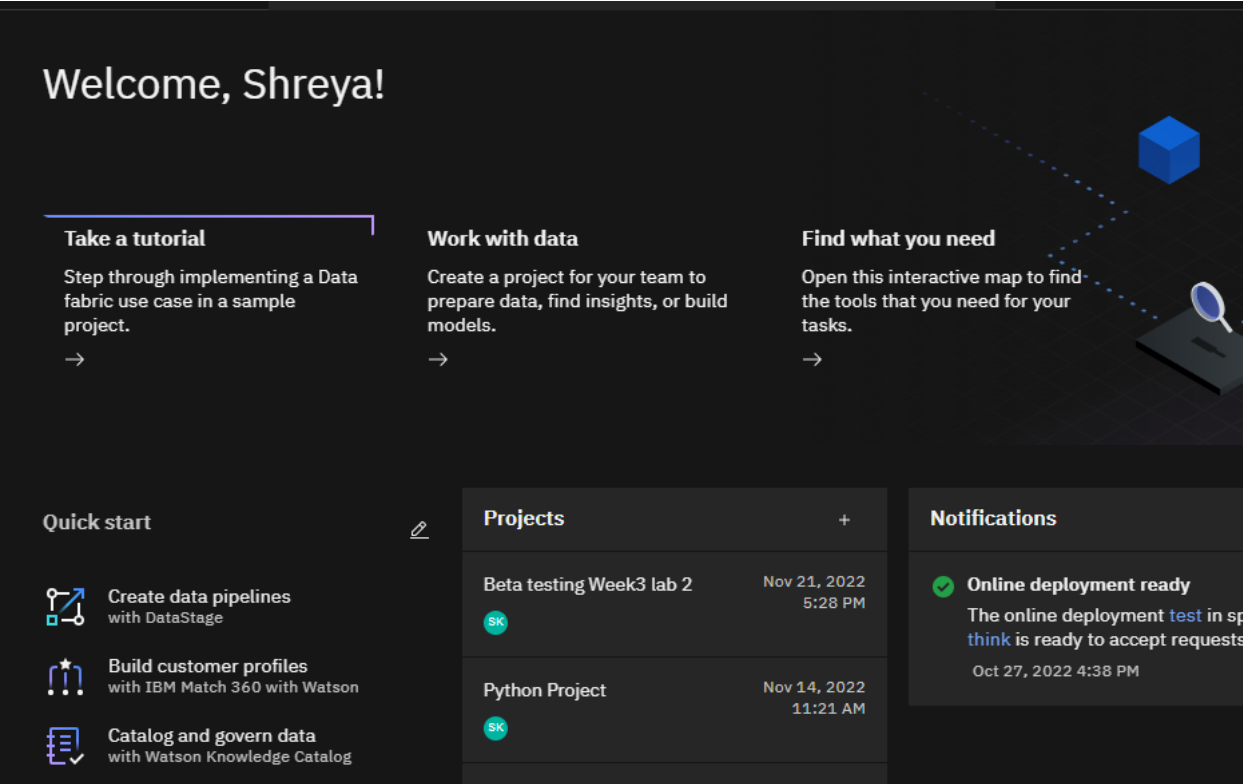
10. Click on **Launch in IBM Cloud Pak for Data**.



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

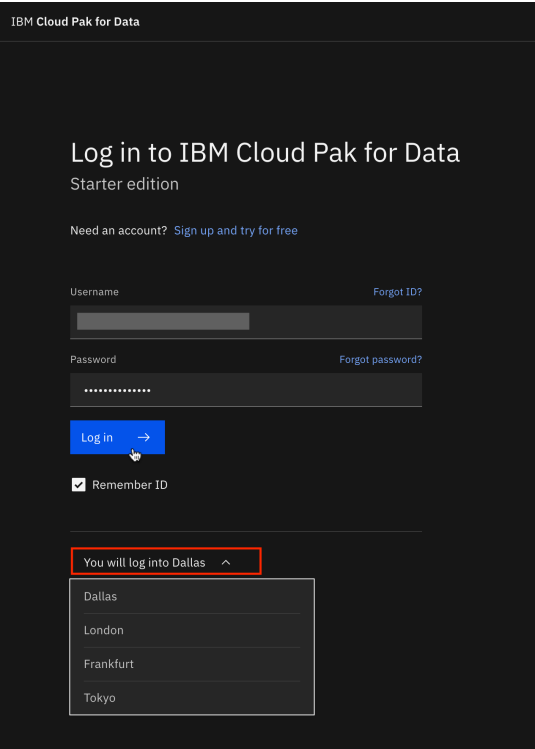


12. You have successfully logged in to the IBM Cloud Pak for Data platform.



Task B : Login to IBM Cloud Pak for Data

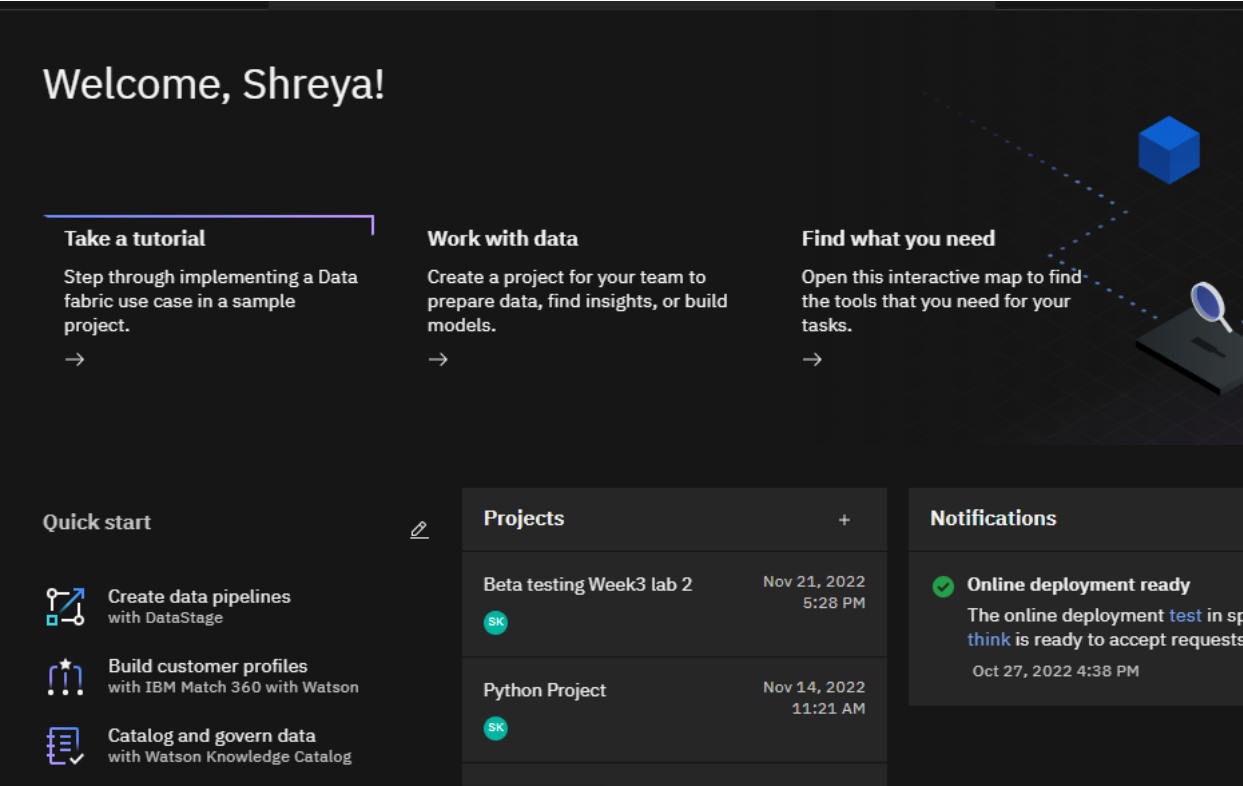
- If you just completed Task A, you will already be logged in, so skip Task B.
1. Go to [datapatform.cloud.ibm.com](https://datapatform.cloud.ibm.com).
  2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud), **password** and select a **region**, same one you used for IBM Cloud account and IBM Cloud Pak for Data(if you have completed Task A).



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

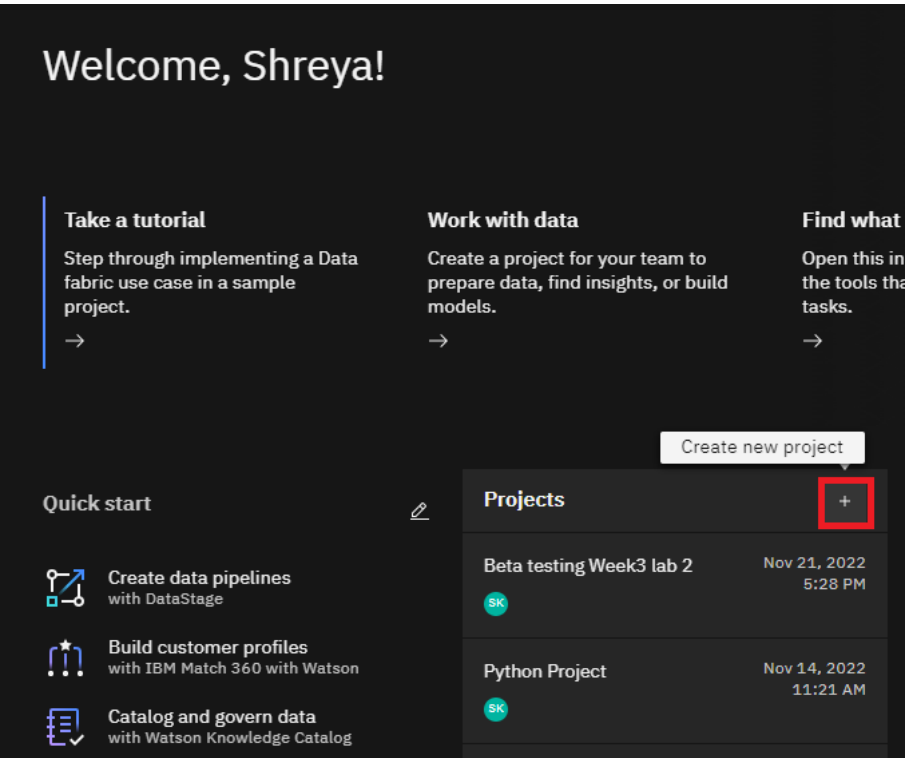


4. You have successfully logged in to the IBM Cloud Pak for Data platform.

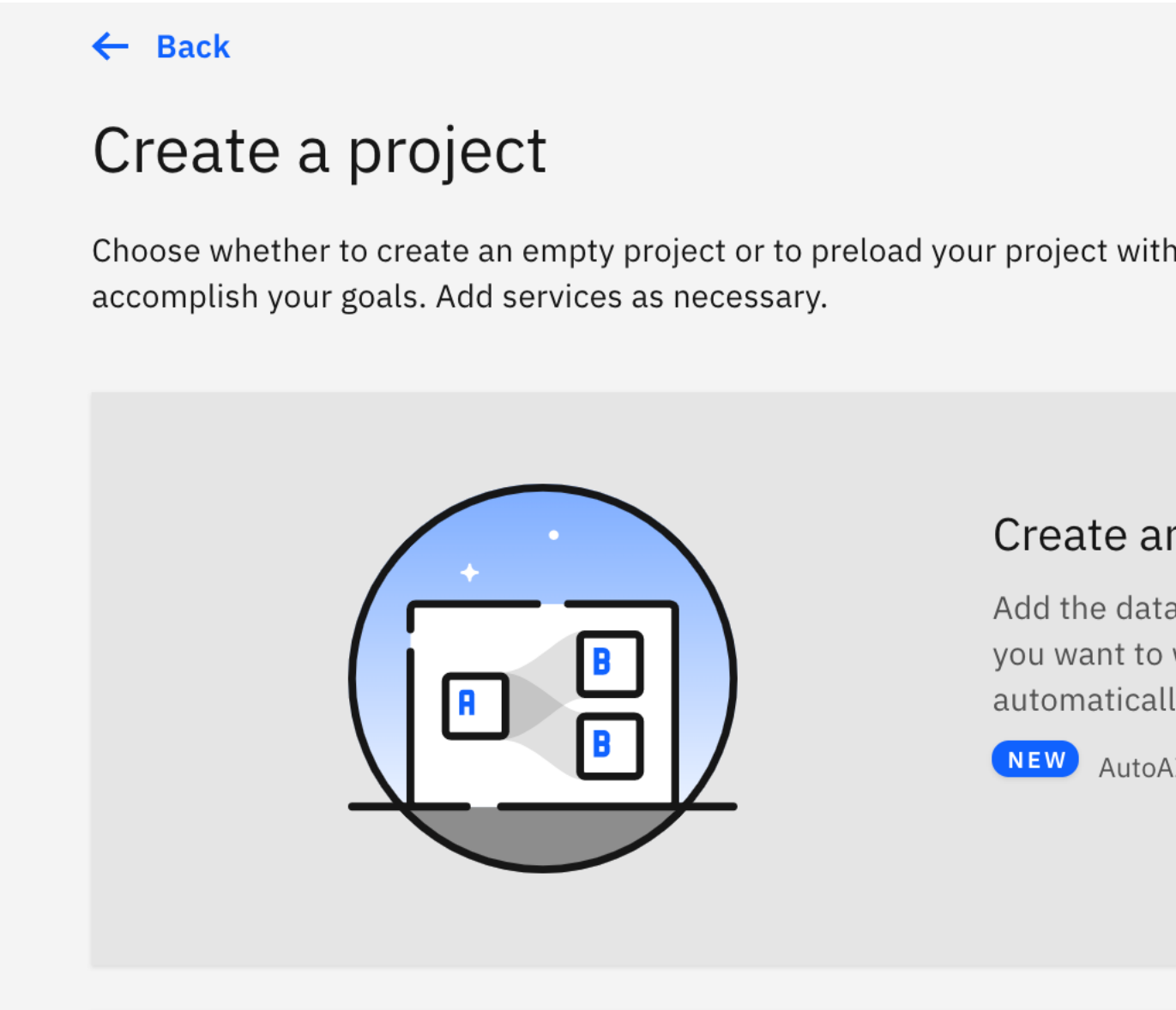


Task C : Create a New Project

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

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	<div>1 COS Service Instance</div> <div>Storage up to 25 GB/month</div> <div>Up to 2,000 Class A (PUT, COPY, POST, and LIST) requests per month</div> <div>Up to 20,000 Class B (GET and all others) requests per month</div> <div>Up to 10 GB/month of Data Retrieval</div> <div>Up to 5GB of egress (Public Outbound)</div> <div>Applies to aggregate total across all storage bucket classes</div> <div>The Lite service plan for Cloud Object Storage includes Regional and Cross Regional resiliency, flexible data classes, and built in security.</div> <div>Lite plan services are deleted after 30 days of inactivity.</div>	

Free

  || Standard | There is no minimum fee, so you pay only for what you use. | [See pricing details](#) |

Configure your resource

Service name

Cloud Object Storage-iu

Select a resource group

Default

Summary

Cloud Object Storage

Region: Global

Plan: Lite

Service name: Cloud Object Storage-iu

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

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**.

about:blank

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IBM Cloud Pak for Data

Sandip Saha Jay's Account

### New project

**Define project details**

Name

Capstone Project

Description

Project description

**Choose project options**

☐ Restrict who can be a collaborator ⓘ

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

**Storage**

Cloud Object Storage-iu

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

Launch IDE

Overview

Assets

Jobs

Manage

Find assets

Add asset

New asset

0 asset

All assets

Asset types

Start adding assets

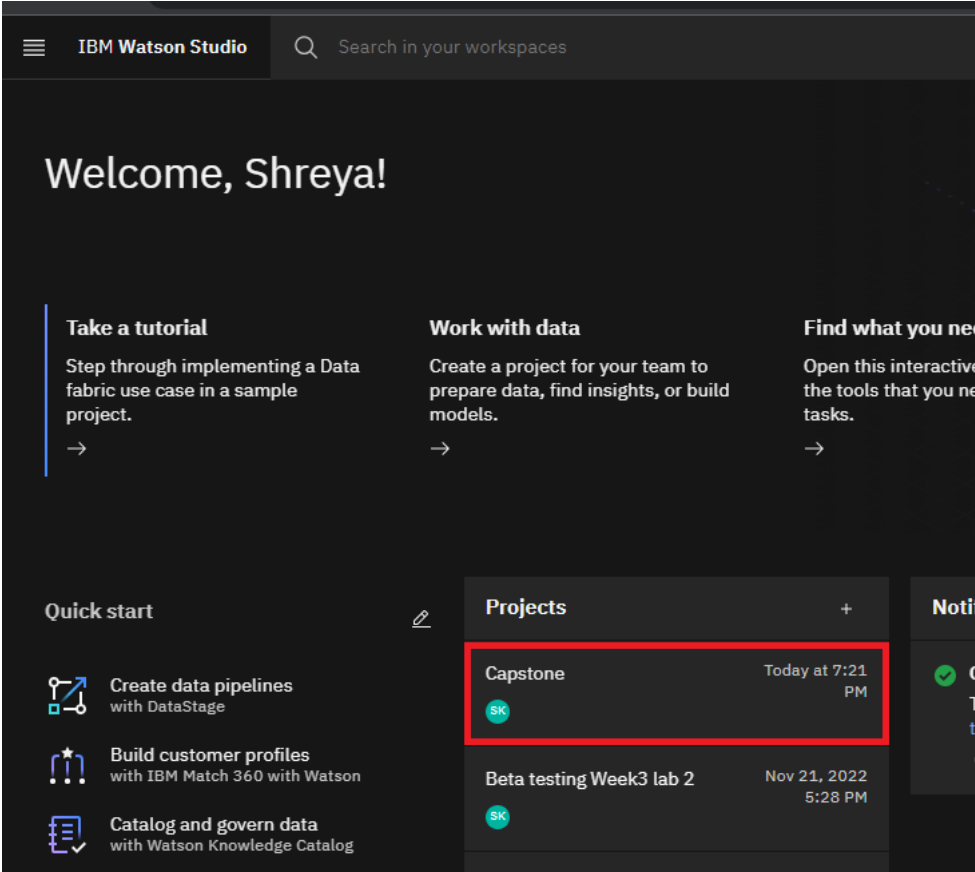
To get started with project assets, click **New asset** to create them, or **Add asset** to add existing ones.

## Exercise 2 : Add a CDE service and Upload External Data

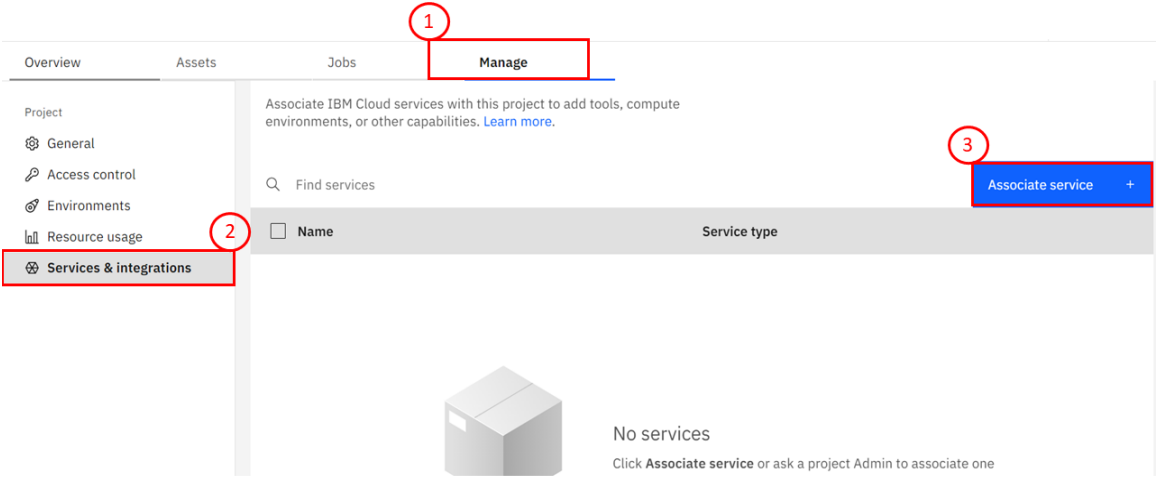
In this exercise, you will learn how to add a Cognos Dashboard Embedded (CDE) service and upload external data files to your project.

### Task A : Add a CDE service

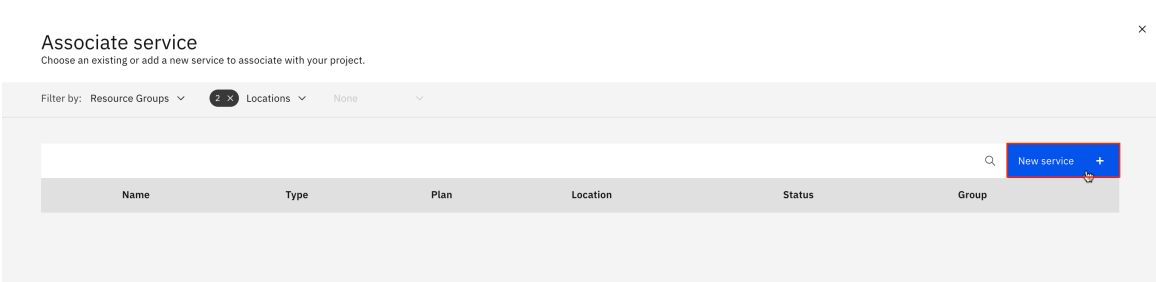
1. From IBM Cloud Pak for Data homepage, got to **Projects** under Quick navigation and click on the Capstone project you had created earlier



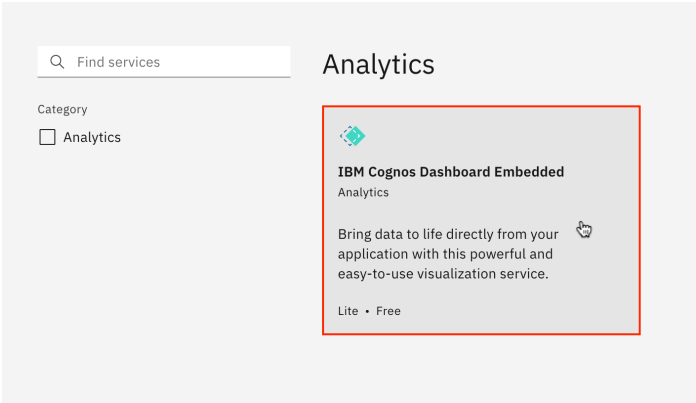
2. Click on **Manage** tab , from the **Services and integrations** section click **Associate service**



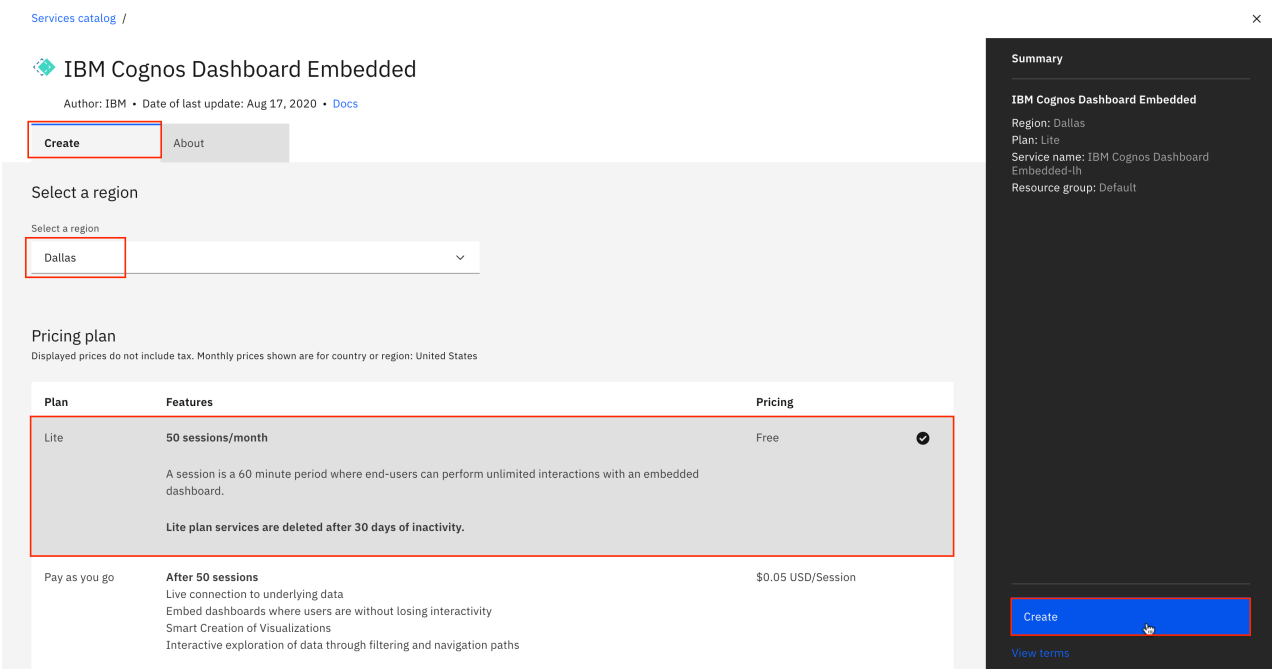
3. Click **New service**.



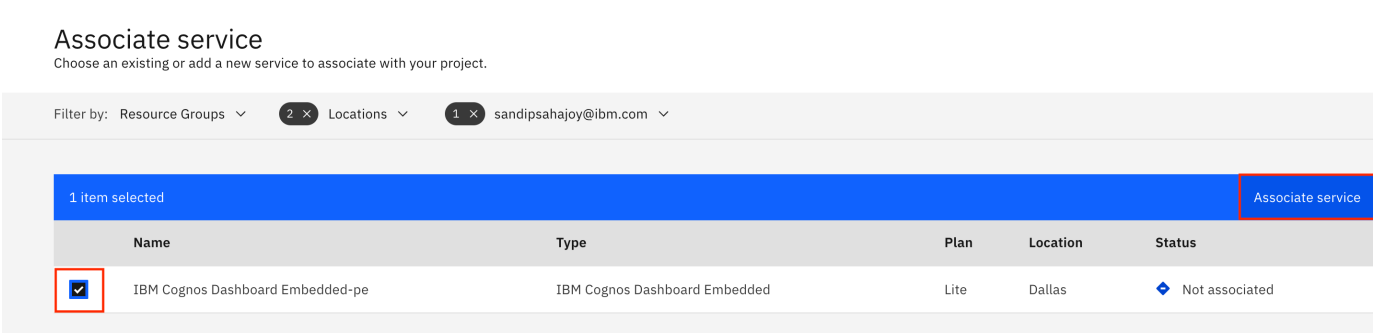
4. Click **IBM Cognos Dashboard Embedded**.



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



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



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 Locations 1 sandipsahajoy@ibm.com

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

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**.

Projects / IBM\_Project

OverviewAssetsJobsManage

Find assets

0 asset

All assets

Asset types

All assets

Start adding assets

To get started with project assets, click **New asset** to create them, 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.

▼ Data assets

0 assets selected.

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

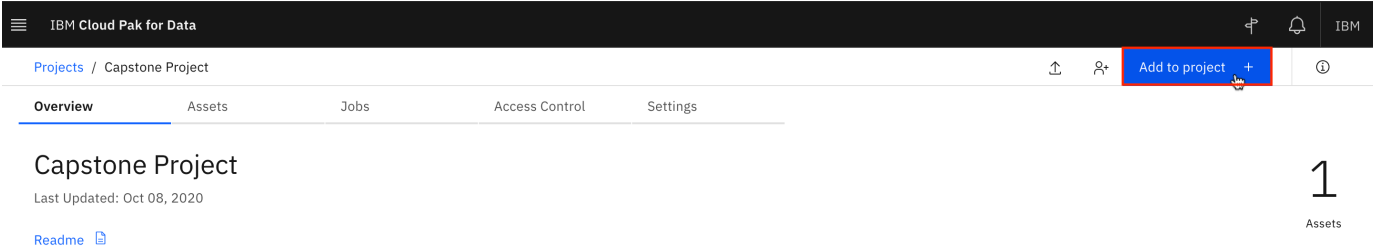
about:blank

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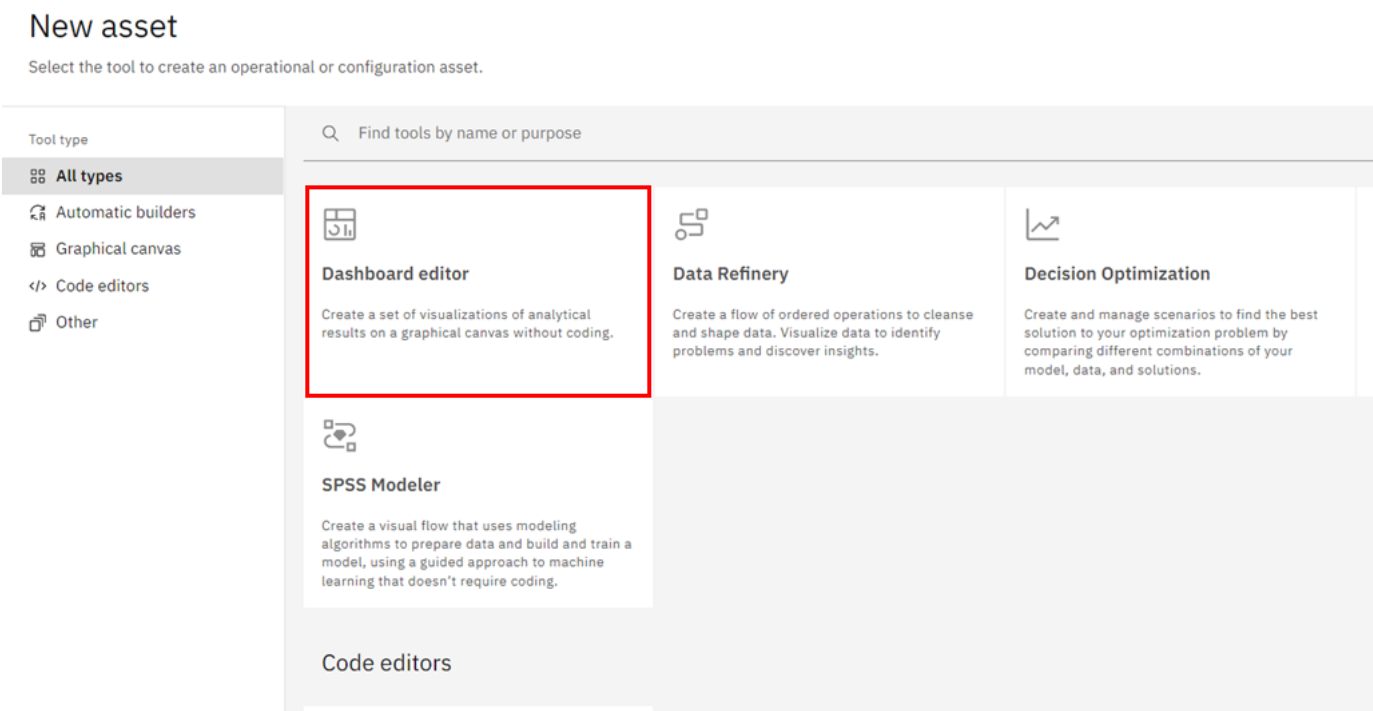
# Exercise 3 : Navigate around CDE UI and Start a New Dashboard with a Template

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

Tabbed

Infographic

Tabbed template

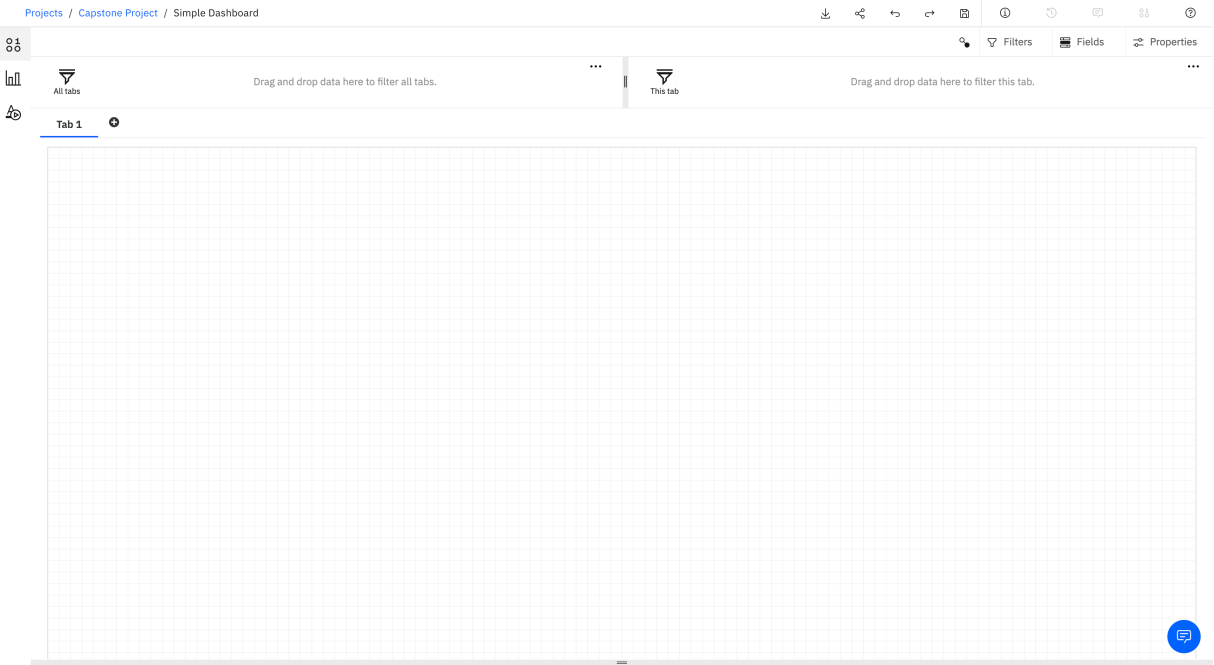
OK

Cancel

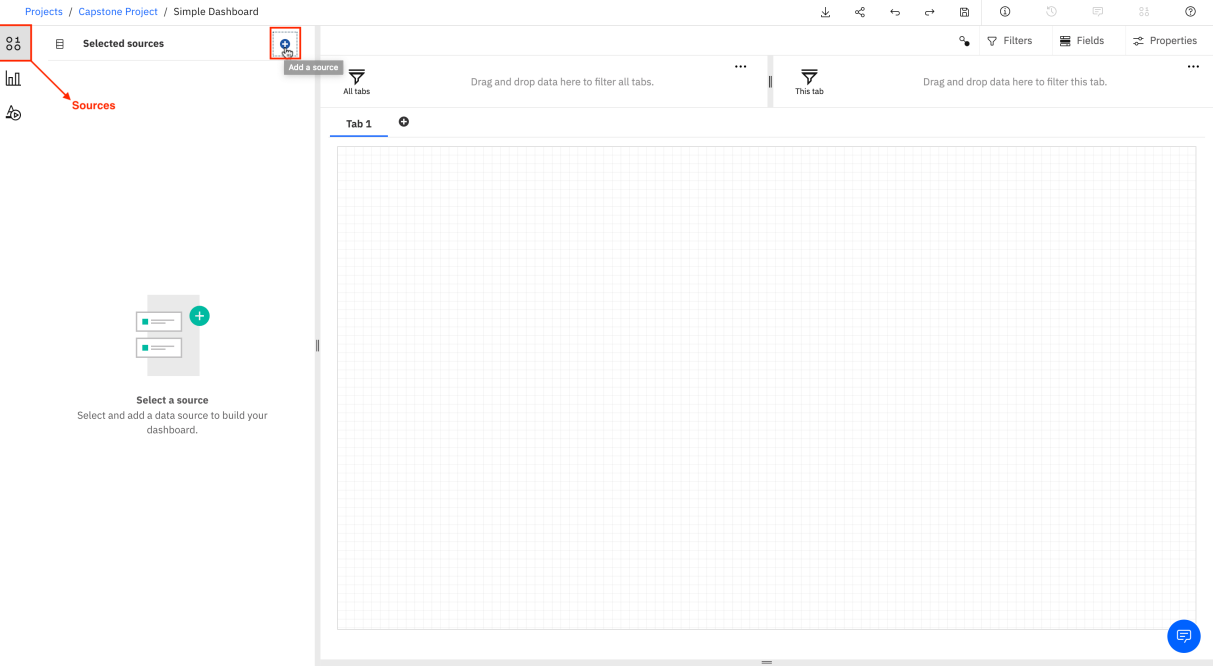
5. Now you have created a new dashboard using the dashboard template.

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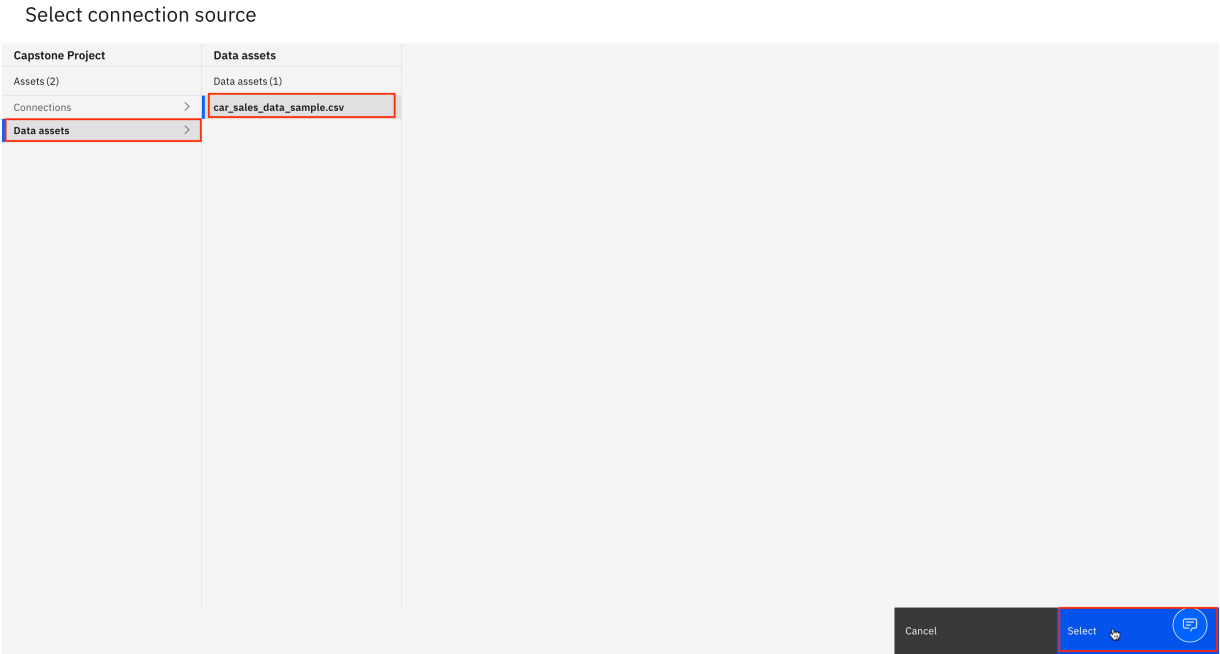


6. Click **Sources** icon from the **Navigation** panel to open the data source panel. Then click **Add a source** icon.



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

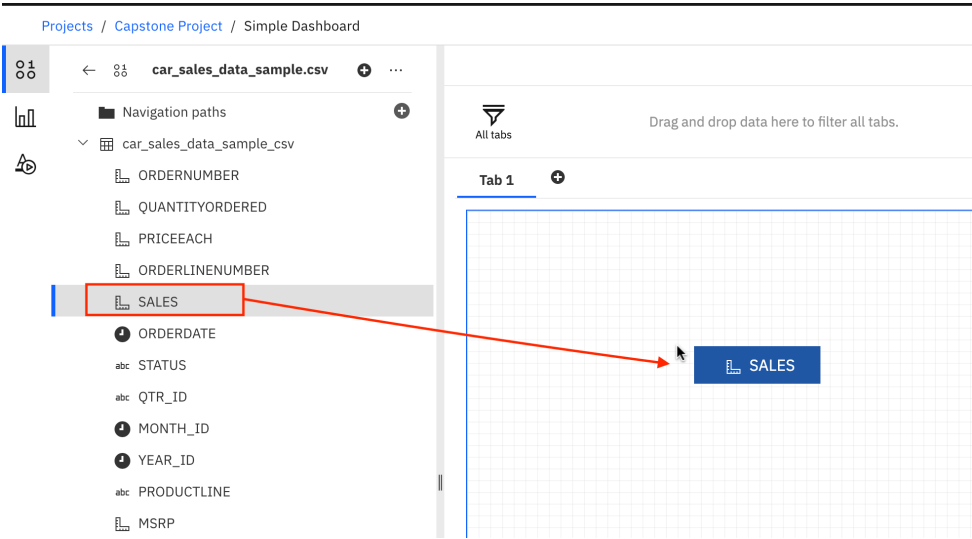




8. From the **Navigation** panel, select **Sources** to open the data source panel, if it is not already open. The **Data Source** panel displays the file `car_sales_data_sample.csv`. Click on `car_sales_data_sample.csv`.



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
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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