



# 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**.

## Objective

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

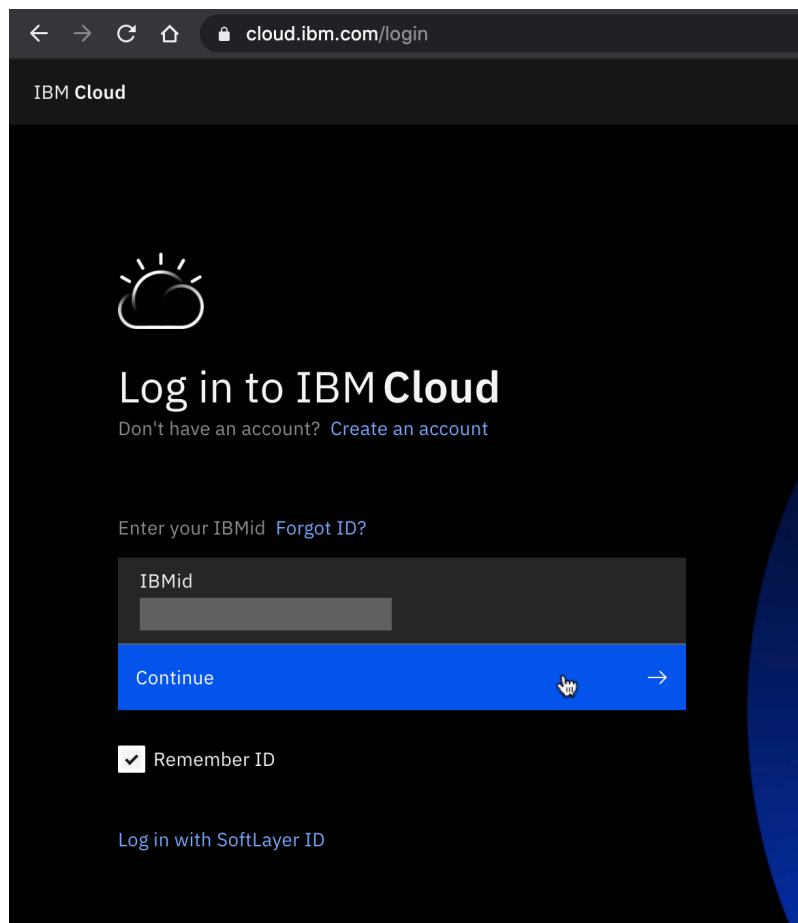
## Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

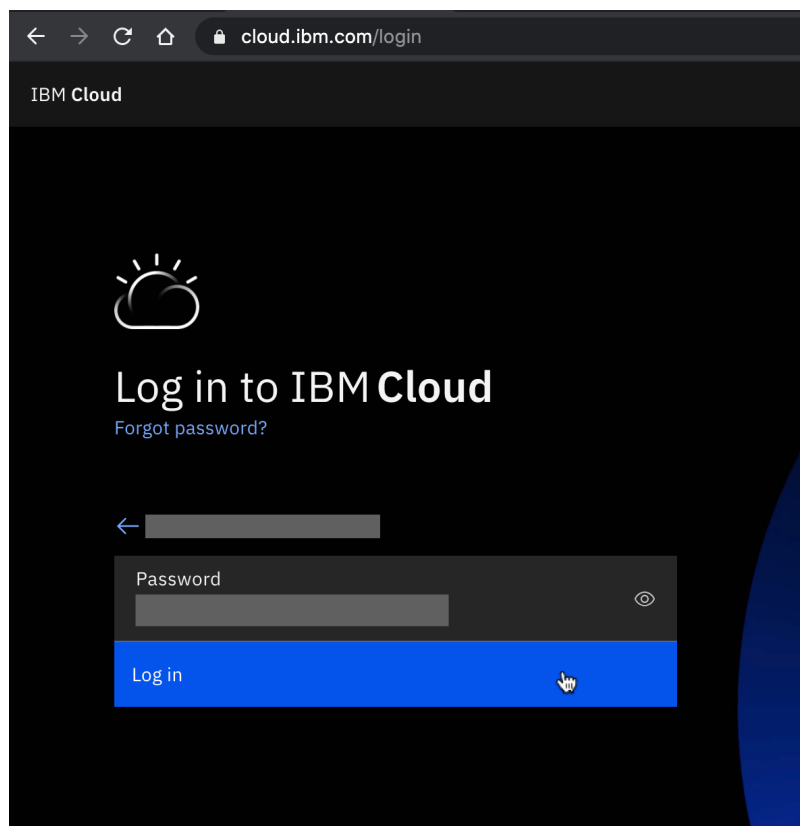
### Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

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

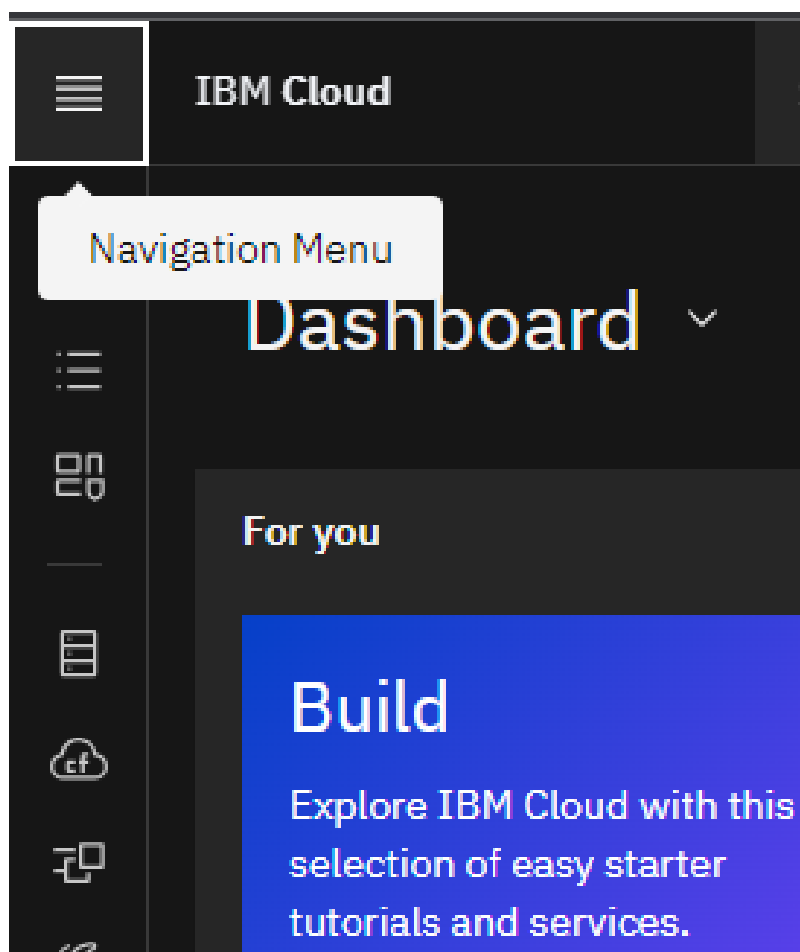
1. Go to [cloud.ibm.com/login](https://cloud.ibm.com/login).
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



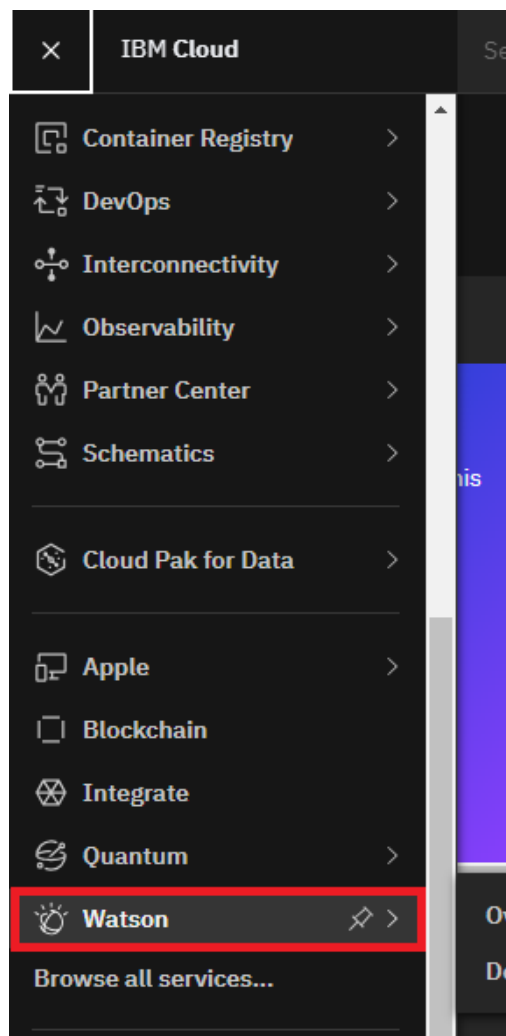
3. Enter your **password** and click **Log in**.



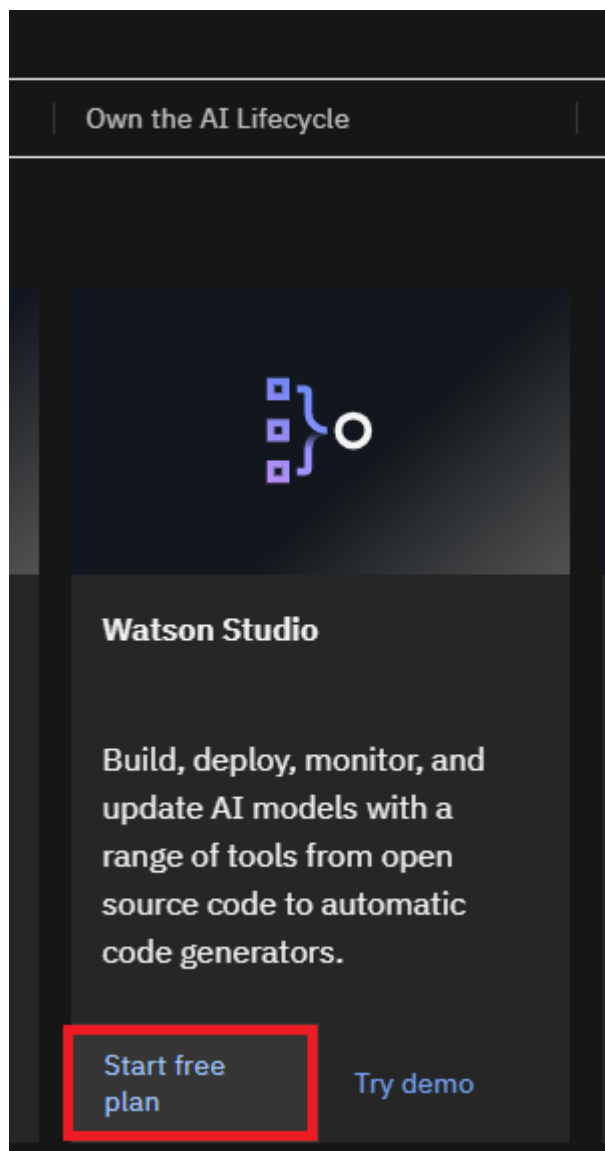
4. Click **Navigation Menu Icon** on the top left side.



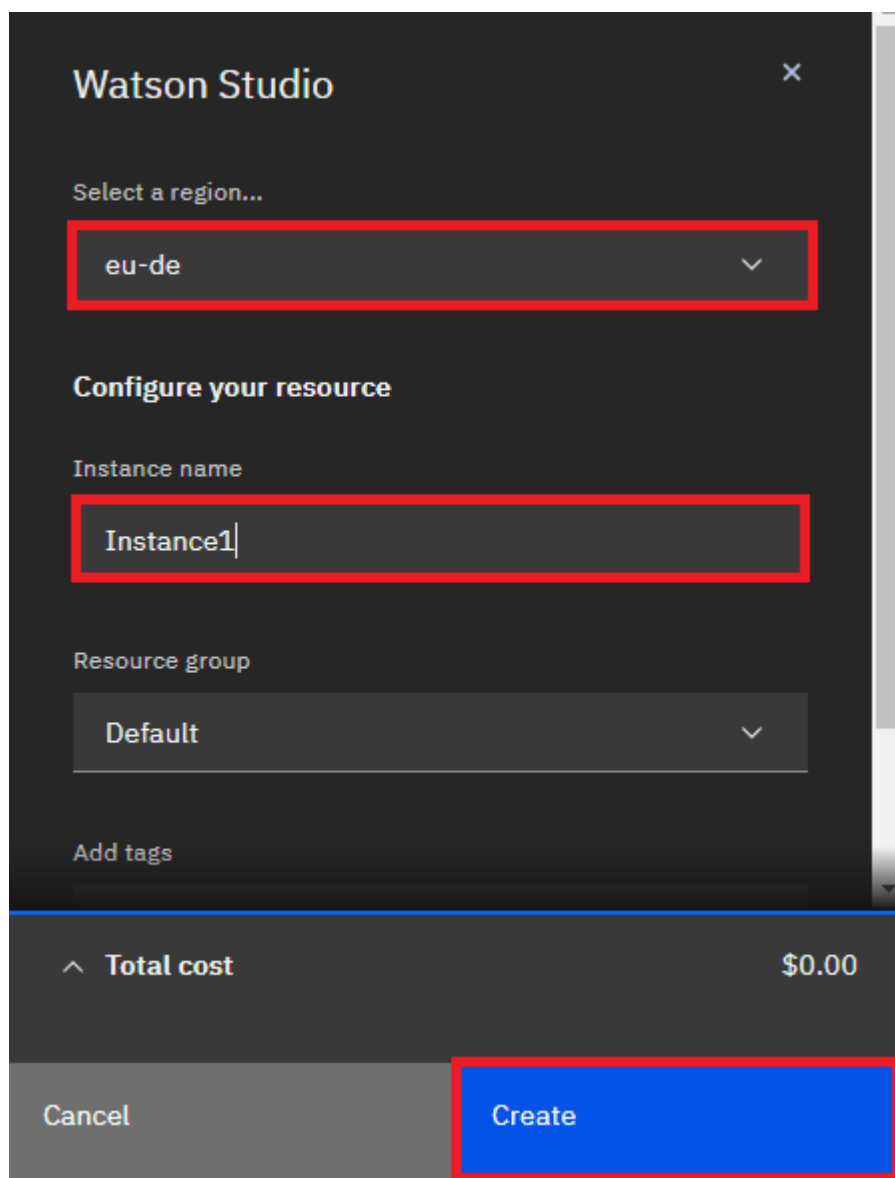
5. From the navigation Menu sidebar, click **Watson**.



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.



Watson Studio

Select a region...

eu-de

Configure your resource

Instance name

Instance1

Resource group

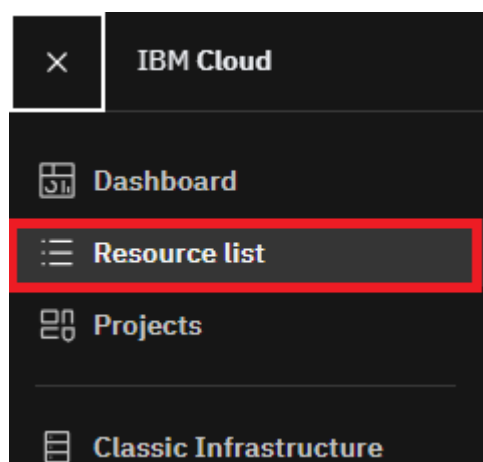
Default

Add tags

^ Total cost \$0.00




Cancel Create

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.

# Resource list

▼ Name	↑ Group	Location
<div><div>🔍</div><div>Filter by name or IP address...</div></div>	<div><div>Filter by group or org...</div><div>▼</div></div>	<div><div>Filter...</div></div>
▼ Converged infrastructure (0)		
▼ Enterprise applications (0)		
^ AI / Machine Learning (3)		
<div><div></div><div>Instance1</div></div>	Default	Frankfurt
<div><div></div><div>KnowledgeCatalog</div></div>	Default	Dallas
<div><div></div><div>WatsonOpenScale</div></div>	Default	Dallas
▼ 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...

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.

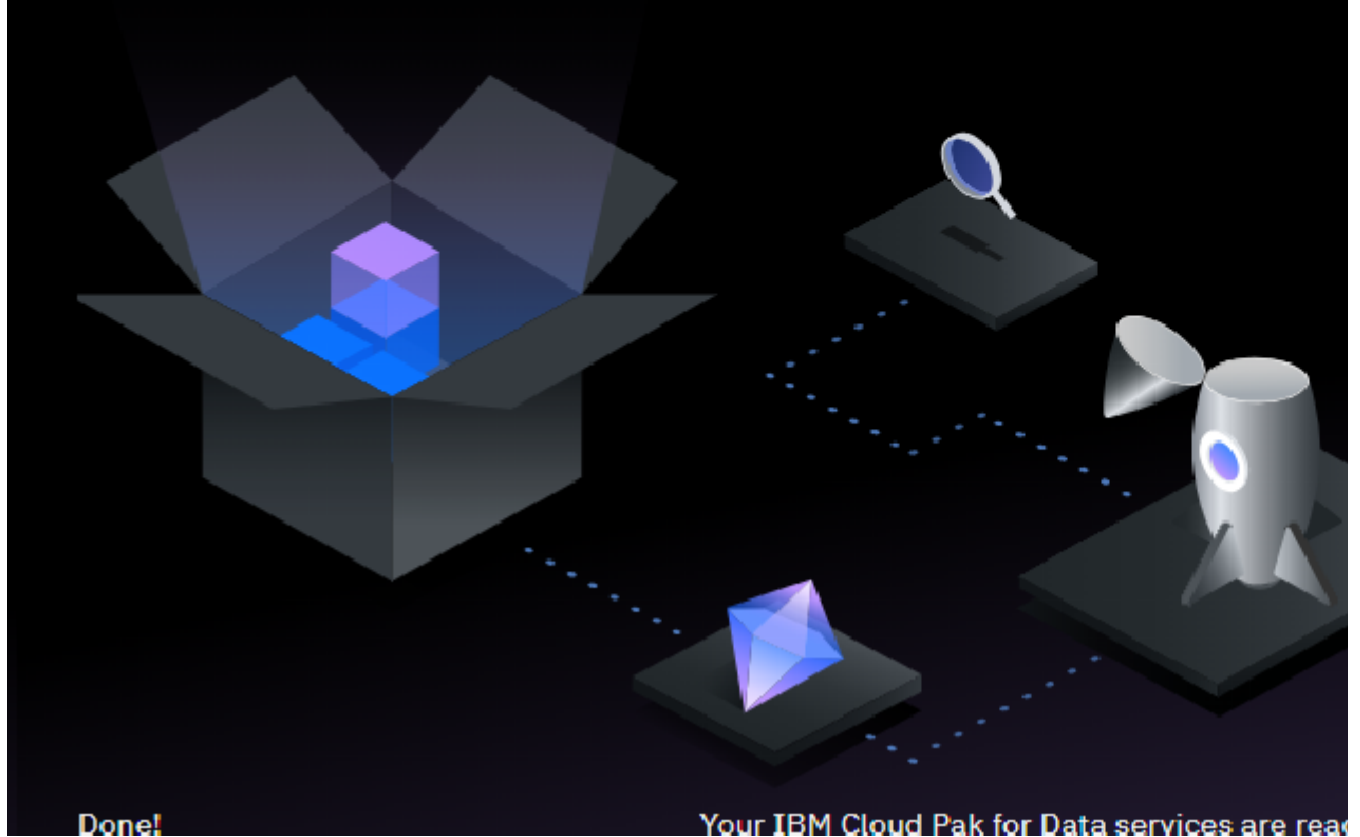
Launch in IBM Cloud Pak for Data

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



IBM Cloud Pak for Data

# Preparing 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 in the tools that you need to complete 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

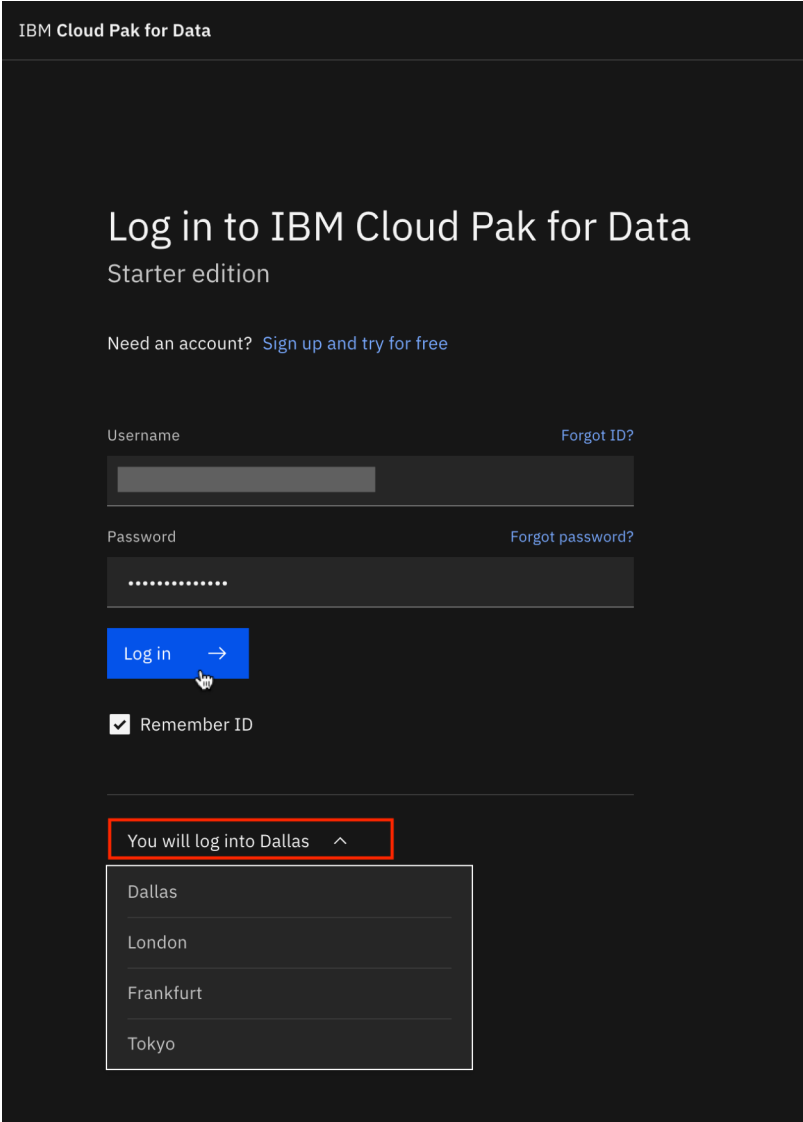
### Projects

Beta testing Week3 lab 2	Nov 21, 2022 5:28 PM
Python Project	Nov 14, 2022 11:21 AM

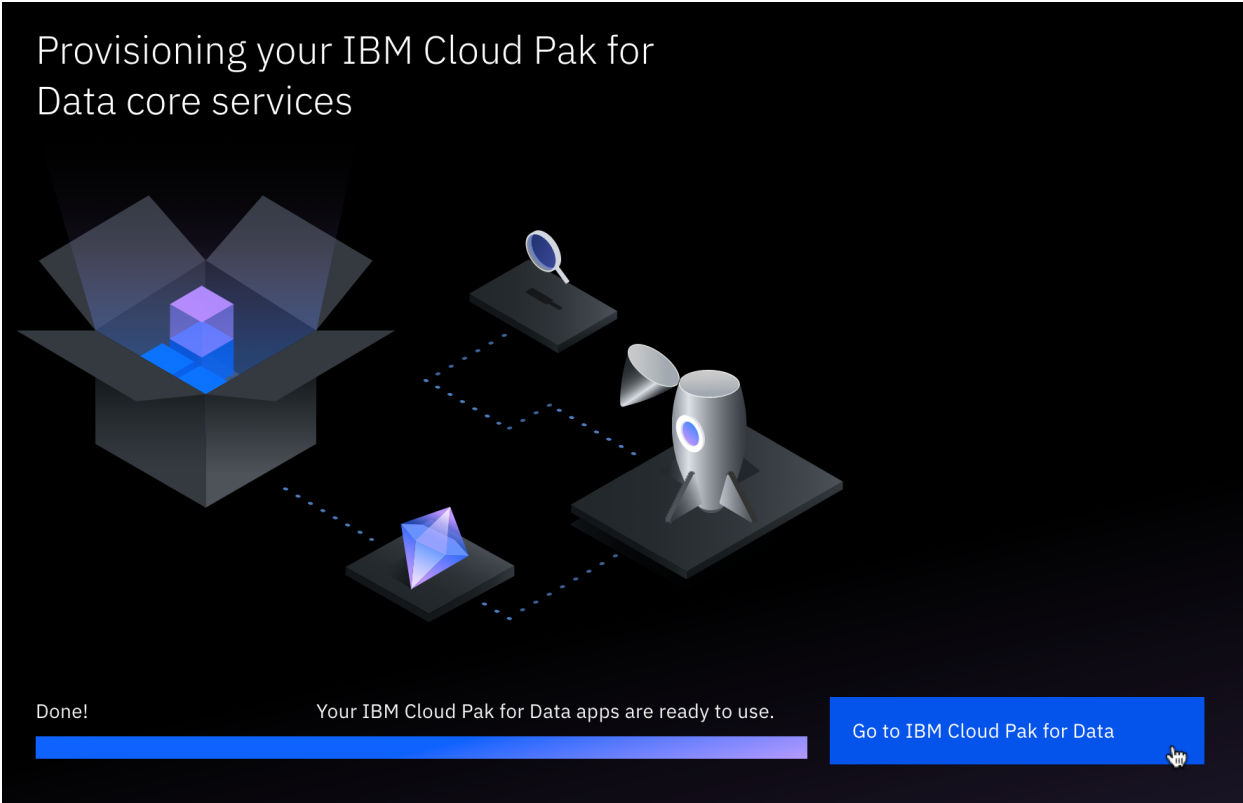
## Task B : Login to IBM Cloud Pak for Data

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

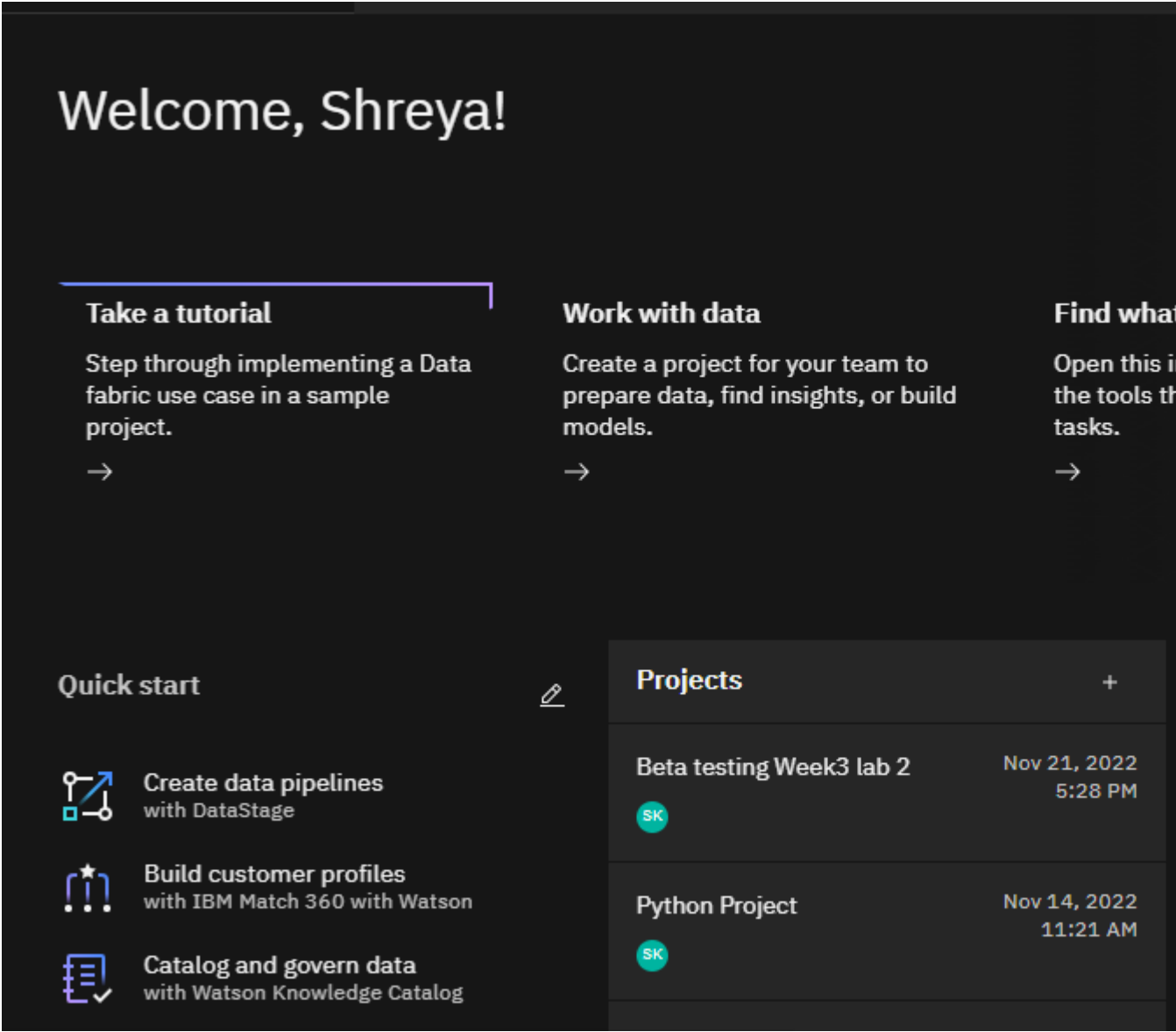
1. Go to [dataplatform.cloud.ibm.com](https://dataplatform.cloud.ibm.com).
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud), **password** and select a **region**, same one you used for IBM Cloud account and IBM Cloud Pak for Data(if you have completed Task A).



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**.

# 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


Open this in the tools th 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

Create new project

+

Beta testing Week3 lab 2

Nov 21, 2022 5:28 PM

SK

Python Project

Nov 14, 2022 11:21 AM

SK

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

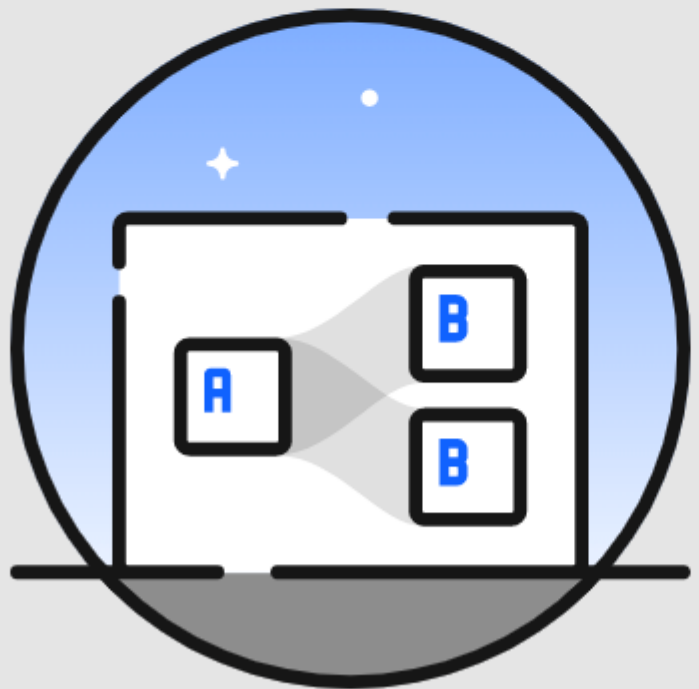
about:blank

13/31

← Back

# Create a project

Choose whether to create an empty project or 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.

☰

IBM Cloud Pak for Data

# New project

Define project details

Name

Capstone Project

Description

Project description

Define storage

1 Select storage

Add

Add an object storage bucket.

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><div><b>1 COS Service Instance</b></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></div>	Free <input checked="" type="checkbox"/>
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

💬

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

Add

Add an object storage service. Refresh.

2 Refresh

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

☰

IBM Cloud Pak for Data

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.

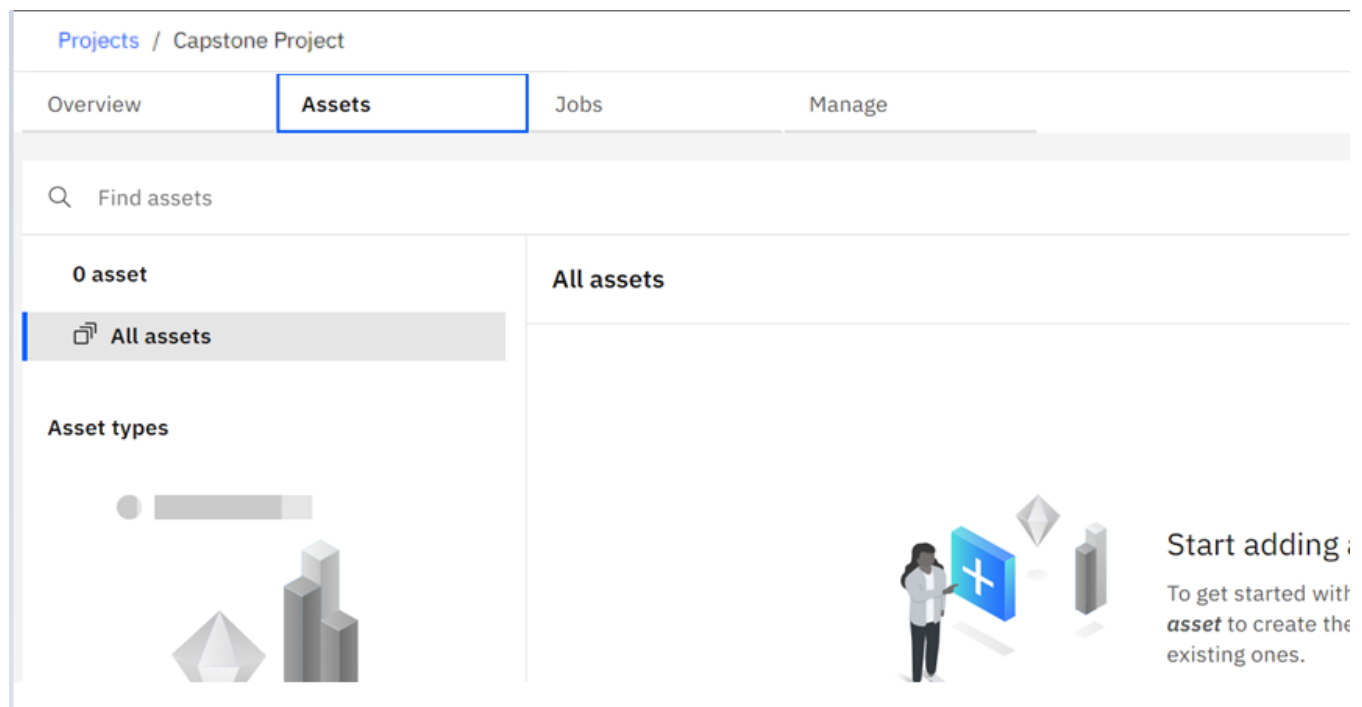
Cancel

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

about:blank

16/31







## 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


Open this in the tools th 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

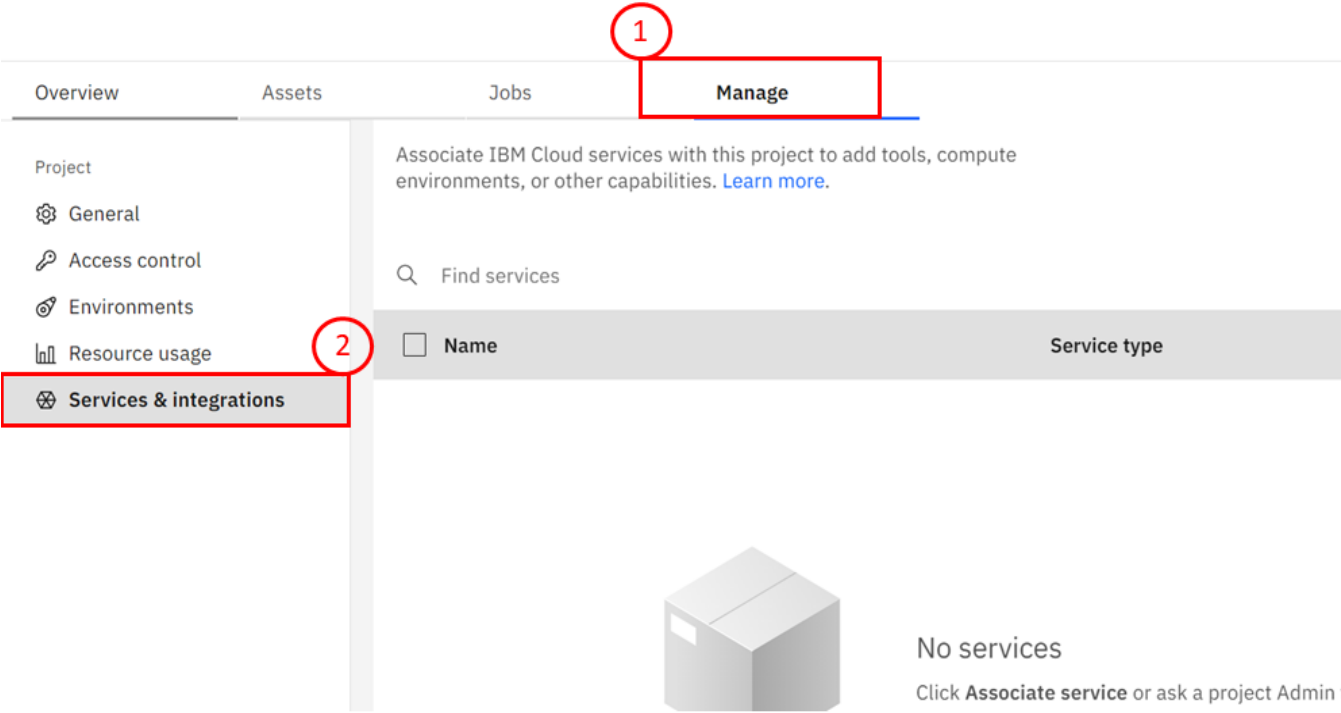
Nov 21, 2022 5:28 PM

SK

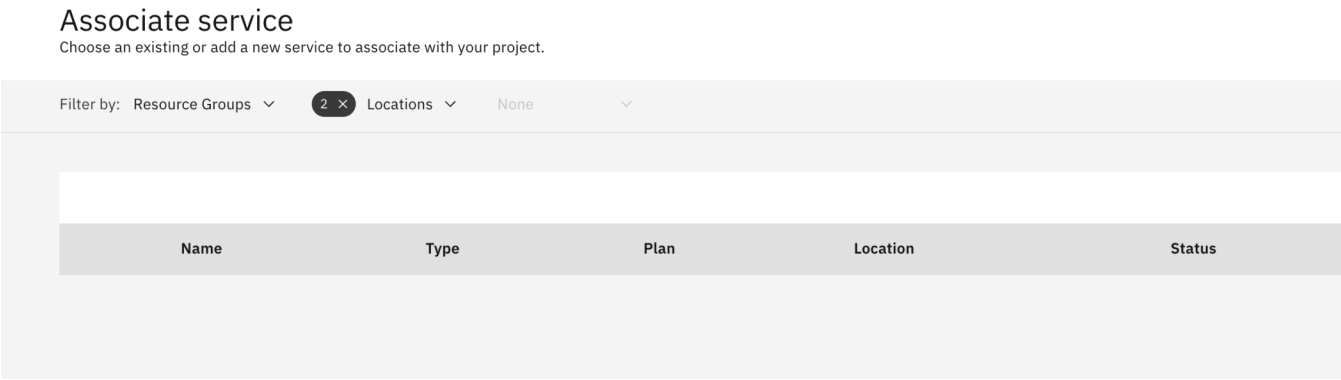
2. Click on **Manage** tab , from the **Services and integrations** section click **Associate service**

about:blank

18/31



3. Click **New service.**



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

Find services

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

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

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

	Name	Type
<input checked="" type="checkbox"/>	IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded

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

# Associate service

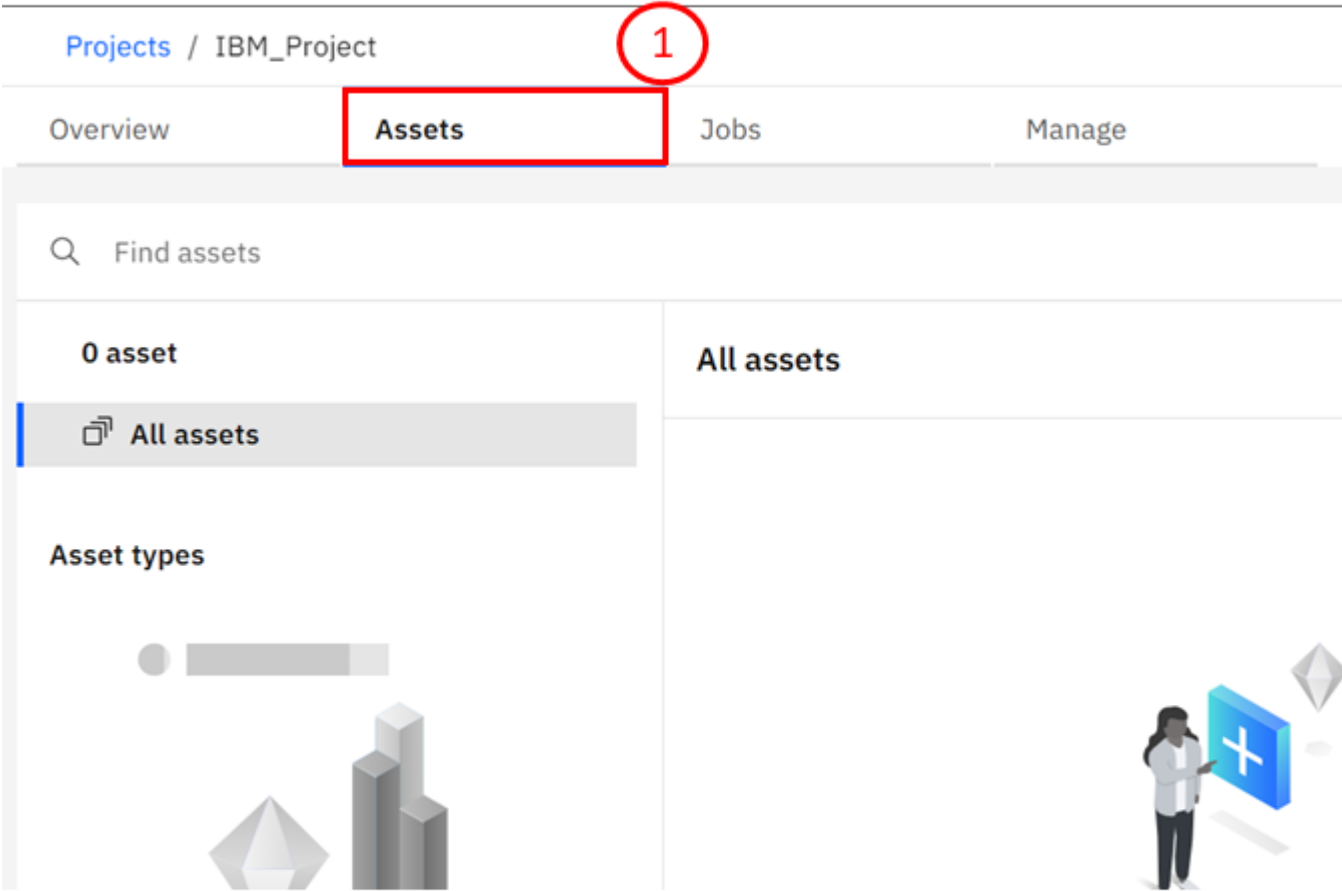
Choose an existing or add a new service to associate with your project.

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

	Name	Type
<input checked="" type="checkbox"/>	IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded

## 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.

▼ Data assets

0 assets selected.

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

### 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**.

☰ IBM Cloud Pak for Data

[Projects](#) / Capstone Project

Overview

Assets

Jobs

Access Control

Settings

Capstone Project

Last Updated: Oct 08, 2020

[Readme](#)

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

# New asset

Select the tool to create an operational or configuration asset.

Tool type

All types

Automatic builders

Graphical canvas

Code editors

Other

Find tools by name or purpose

Dashboard editor

Create a set of visualizations of analytical results on a graphical canvas without coding.

SPSS Modeler

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

Data Refinery

Create a flow of ordered operation and shape data. Visualize data to its problems and discover insights.

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

about:blank

24/31



☰

IBM Cloud Pak for Data

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


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

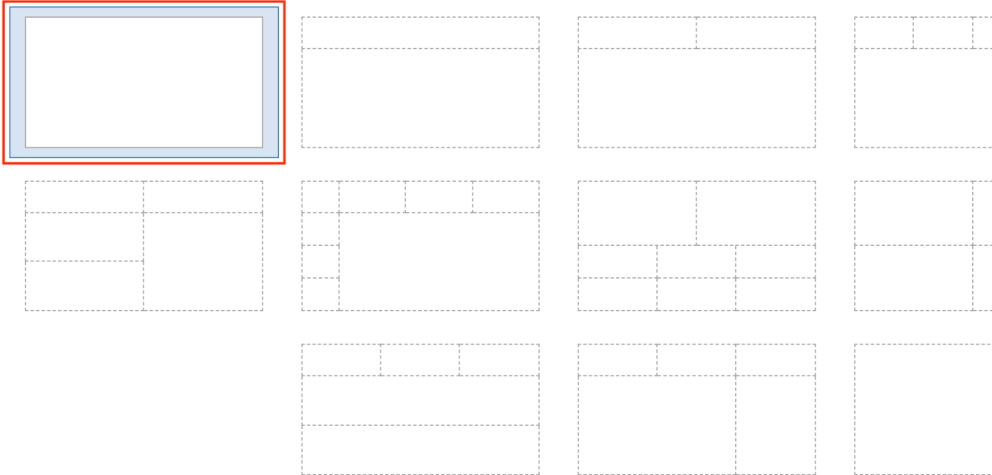


Tabbed

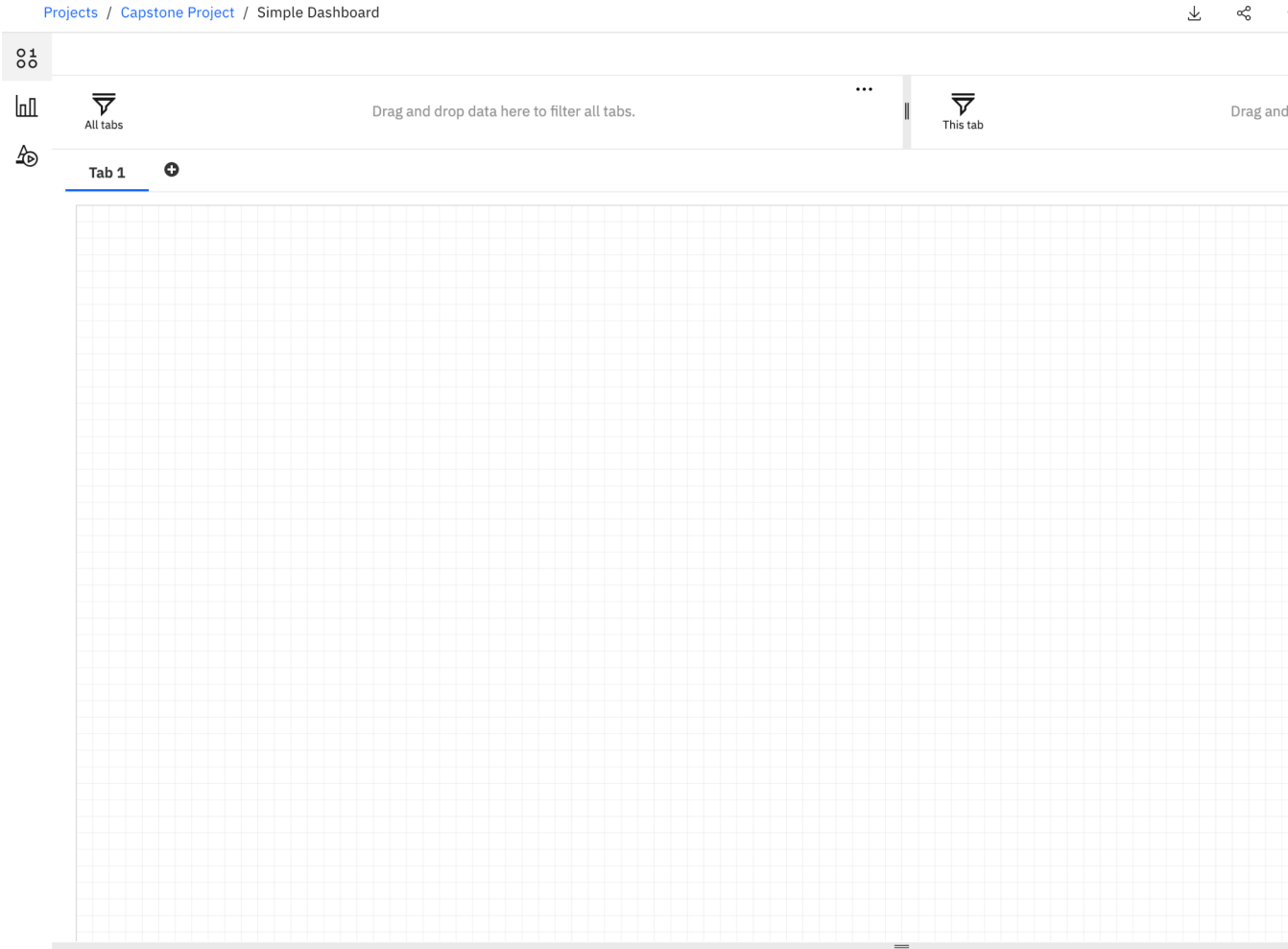


Infographic

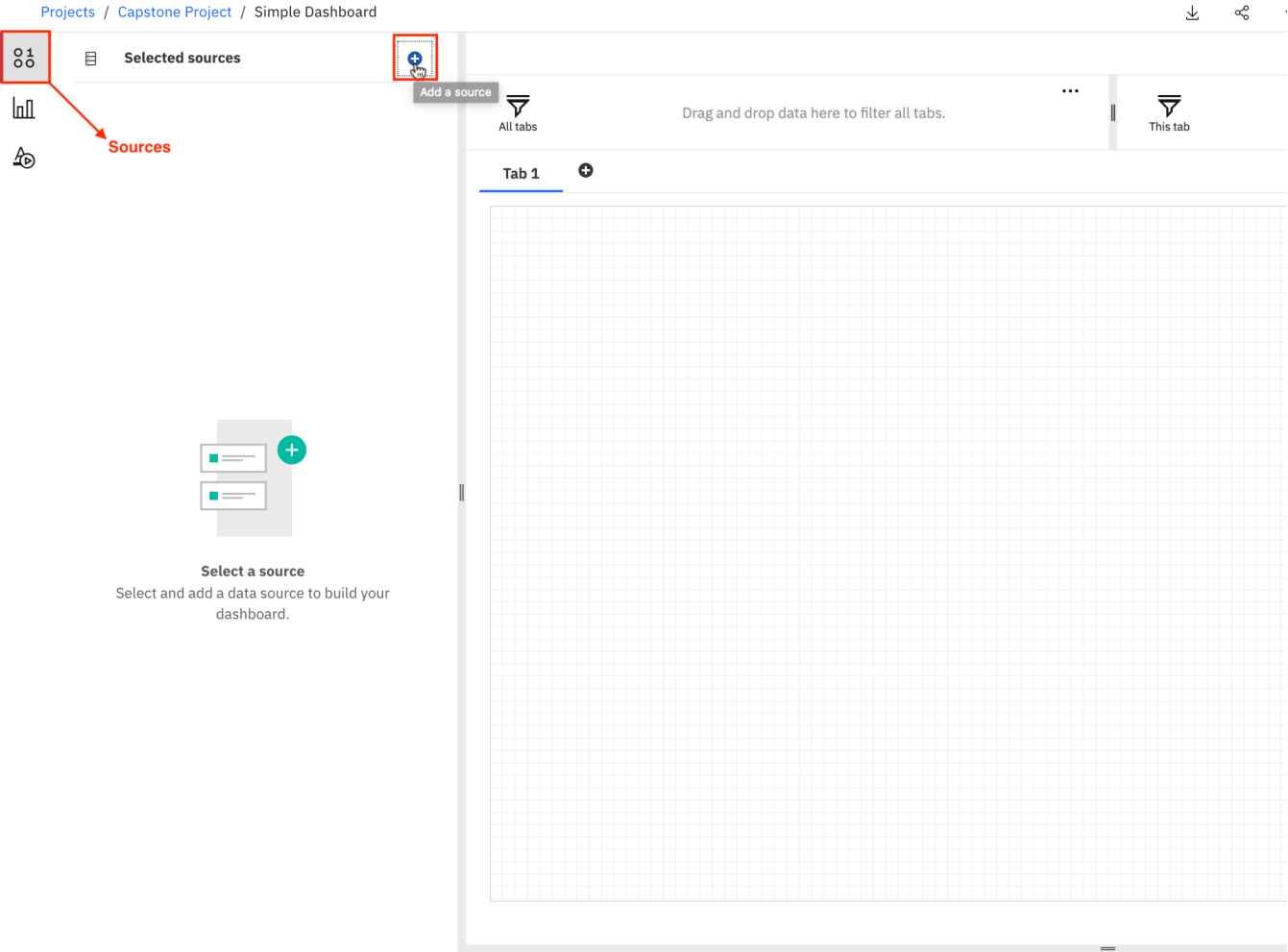
Tabbed template



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

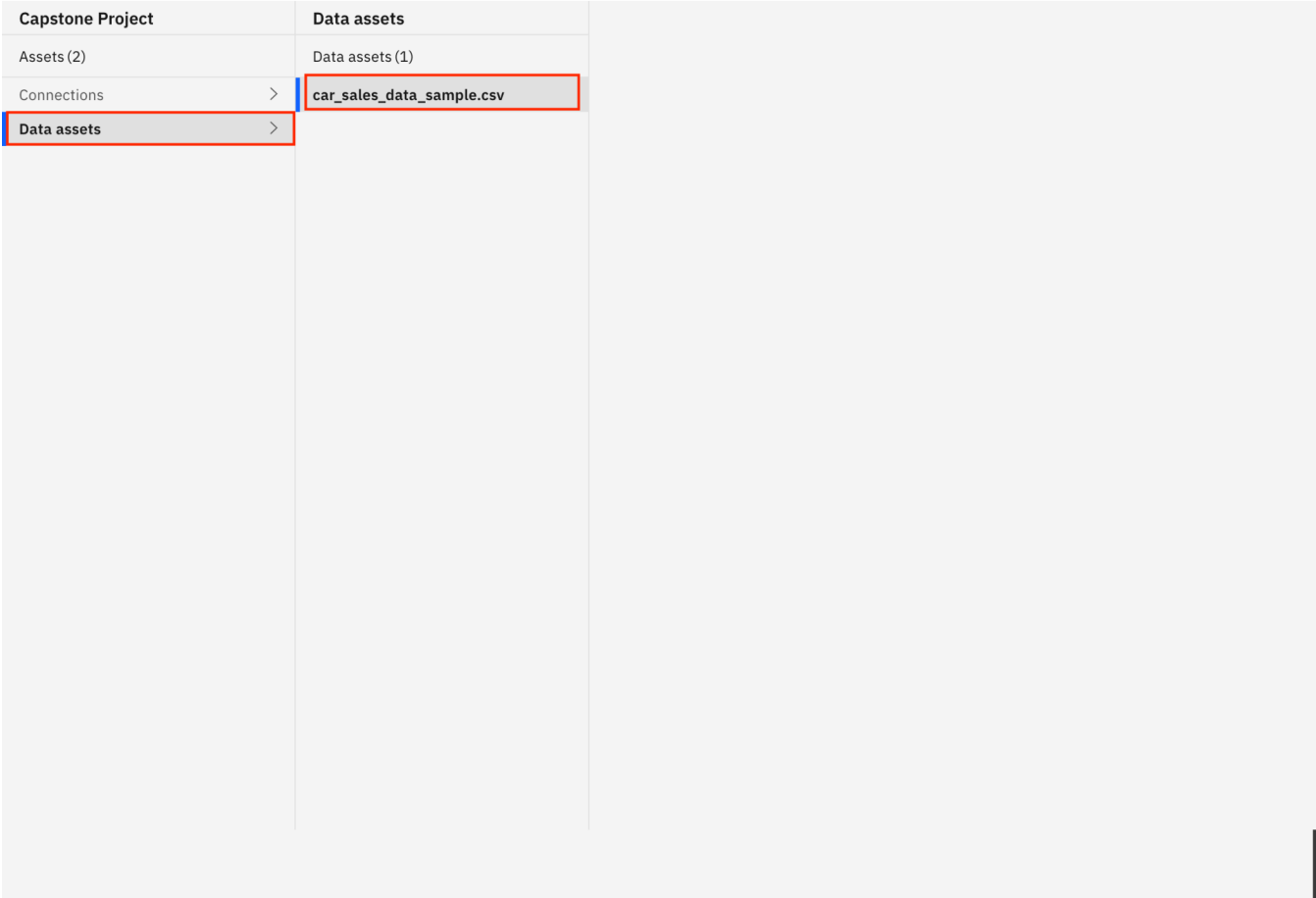


6. Click **Sources** icon from the **Navigation** panel to open the data source panel. Then click **Add a source** icon.



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.

Projects / Capstone Project / Simple Dashboard

The screenshot shows a dashboard builder interface. On the left, a data source named 'car\_sales\_data\_sample.csv' is expanded, showing a list of fields: ORDERNUMBER, QUANTITYORDERED, PRICEEACH, ORDERLINENUMBER, SALES, ORDERDATE, STATUS, QTR\_ID, MONTH\_ID, YEAR\_ID, PRODUCTLINE, and MSRP. The 'SALES' field is highlighted with a red box. A red arrow points from this box to a blue 'SALES' button in the visualization area. The visualization area is labeled 'Tab 1' and contains a grid. Above the grid, there is a filter icon and the text 'Drag and drop data here to filter all tabs.'.

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

**© IBM Corporation 2023. All rights reserved.**