



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

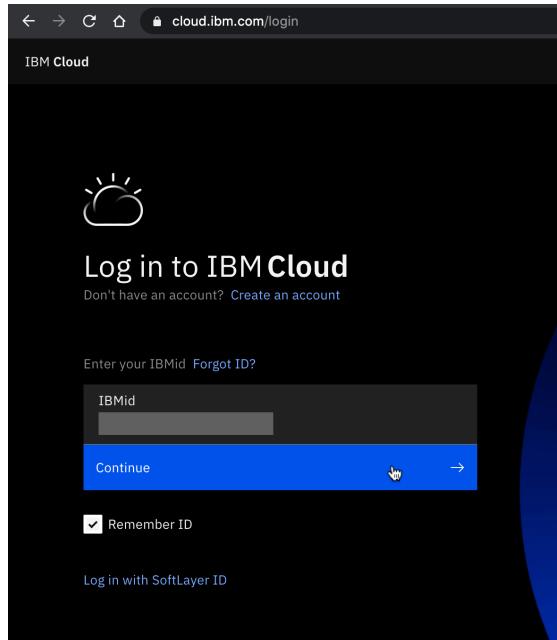
Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

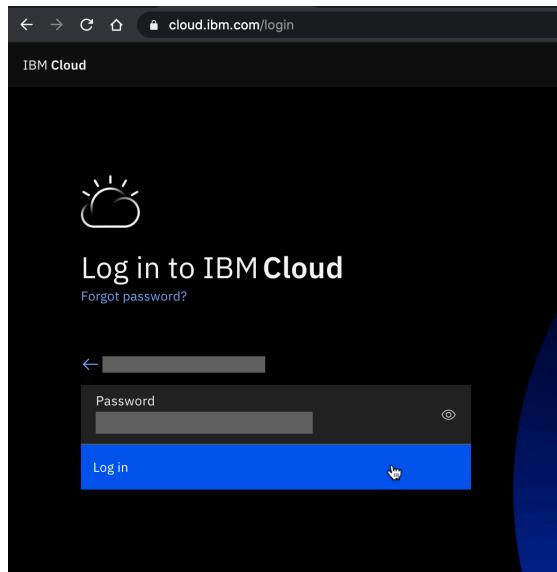
Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

- 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, there's a header with a back/forward button, a refresh button, and a lock icon followed by "cloud.ibm.com". Below the header is a dark navigation bar with the "IBM Cloud" logo and a search bar. A red box highlights the first icon in the sidebar, which is a three-line menu icon. The sidebar itself has a title "Navigation Menu" and a "Dashboard" section with a dropdown arrow. To the left of the sidebar is a vertical list of icons with labels: a document icon for "Resource summary", a cloud icon for "Welcome!", a gear icon for "Get started with IBM Cloud by creating", a box icon for "Create a resource →", a circular arrow icon, a "vm" icon with a server graphic, a wrench icon, a checkmark icon, a square icon, and a plus sign icon for "Try spinning up an app using [starter kits](#)".

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

The screenshot shows the IBM Cloud dashboard with a dark-themed sidebar. The sidebar contains the following sections and items:

- Dashboard**
- Resource List**
- Classic Infrastructure**
 - Cloud Foundry**
 - Functions**
 - Kubernetes**
 - OpenShift**
 - VMware**
 - VPC Infrastructure**
- Security and Compliance**
- Code Engine**
- API Management**
- App Development**
- DevOps**
- Interconnectivity**
- Observability**
- Schematics**
- Apple**
- Blockchain**
- Integrate**
- Managed Solutions**
- Watson** (highlighted with a red border)

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.

The screenshot shows the "Explore our other offerings" section of the IBM Cloud website. It features several cards:

- Explore our other offerings**
- Consult with IBM**

Get the most out of your IBM Cloud account by working with our consultants. Learn how to develop for the cloud, leverage Watson APIs, rearchitect an existing application, or experience the design thinking process in action.



[Engage us now! ↗](#)
- IBM Watson Studio**

Collaborate to find insights fast. Visualize and manipulate data with code, graphical tools, or APIs. Develop models and neural networks with powerful algorithms and popular frameworks.



[Try for free ↗](#) 

[Watch a Demo ↗](#)

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 →

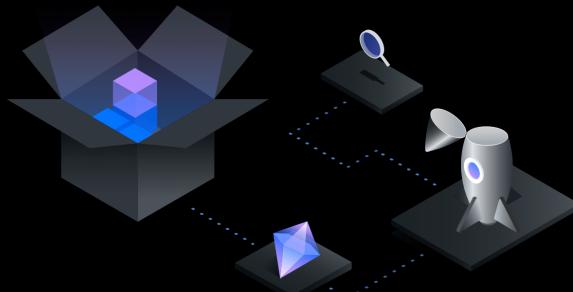
Activate your IBM Cloud account

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](#)

Quick navigation

- Projects
- Deployment spaces
- Support
 - Documentation
 - FAQ
 - What's new
 - Give feedback
 - Stack overflow
 - Manage Tickets

Feedback

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

[View all \(0\)](#)

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

Starter edition

Log in to IBM Cloud Pak for Data

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

Username [Forgot ID?](#)

Password [Forgot password?](#)

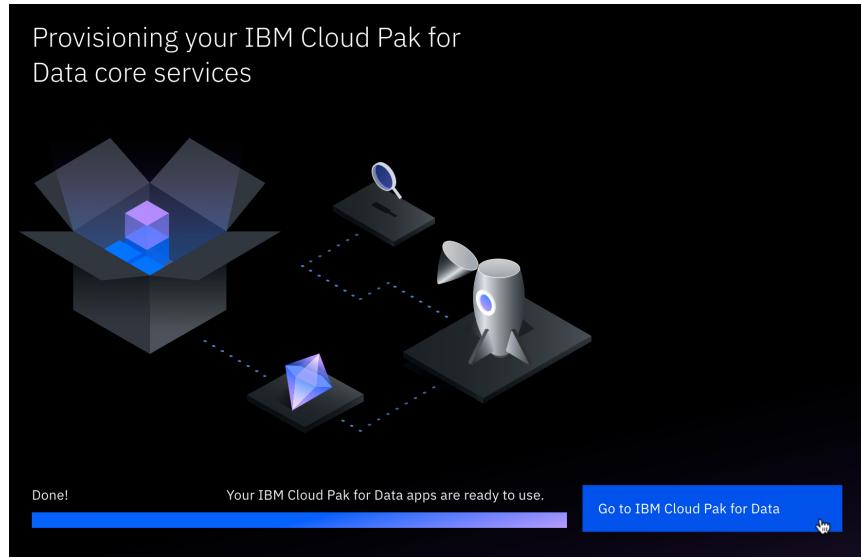
Remember ID

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.

Welcome, Sandip saha!

Learn by example
Work with data
Extend your capabilities

Quick navigation
Projects
Deployment spaces

Support
Documentation
FAQ
What's new
Give feedback
Stack overflow
Manage Tickets

Notifications
New in gallery

Deployment spaces
Your services

Feedback

Task C : Create a New Project

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

Work with data

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

[Create a 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.

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

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**.

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.

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 IBM Cloud Pak for Data homepage. At the top, there's a header with three horizontal bars and the text "IBM Cloud Pak for Data". Below the header, it 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" sidebar with three options: "Projects" (which is highlighted with a red box and has a cursor icon over it), "Deployment spaces", and "Notifications". The main area is titled "Overview".

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

The screenshot shows the "Projects" page. At the top, there's a header with three horizontal bars and the text "IBM Cloud Pak for Data". Below the header, it says "Projects". There's a search bar with the placeholder "Which project are you looking for?". Below the search bar, there's a table with one row. The row has a "Name" column containing "Capstone Project", which is also highlighted with a red box and has a cursor icon over it. The rest of the page is mostly blank.

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

The screenshot shows the "Manage" tab selected in the "Services & integrations" section. The "Manage" tab is highlighted with a red box and has a circled "1" above it. On the left, there's a sidebar with several options: "General", "Access control", "Environments", "Resource usage", and "Services & integrations" (which is highlighted with a red box and has a circled "2" above it). The main area has a heading "Associate IBM Cloud services with this project to add tools, compute environments, or other capabilities. Learn more." Below that, there's a search bar with the placeholder "Find services" and a table with columns "Name" and "Service type". At the bottom, there's a message "No services" and a link "Click Associate service or ask a project Admin to associate one". A blue button "Associate service" with a plus sign is highlighted with a red box and has a circled "3" above it.

4. Click **New service**.

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

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

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

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 the 'Associate service' page. At the top, it says 'Associate service' and 'Choose an existing or add a new service to associate with your project.' Below this are three filter dropdowns: 'Filter by: Resource Groups', 'Locations', and 'sandipsahajoy@ibm.com'. A search bar and a blue 'New service +' button are also present. The main table has columns: Name, Type, Plan, Location, Status, and Group. One row is shown: 'IBM Cognos Dashboard Embedded-pe' (Type: IBM Cognos Dashboard Embedded, Plan: Lite, Location: Dallas, Status: Associated, Group: Default). The 'Associated' status is highlighted with a green circle and checkmark.

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. At the top, there's a breadcrumb 'Projects / IBM_Project' and a red circle labeled '1' over the 'Assets' tab. To the right, there's a red circle labeled '2' over a red box containing the text 'Click here to add a Data set'. The main area shows '0 asset' and a 'Find assets' search bar. Below is a section titled 'Asset types' with icons for various data types. To the right, there's a 'Start adding assets' section with an illustration of a person holding a plus sign and text instructions: '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.

The screenshot shows the 'Data assets' section. It has a heading 'Data assets' with a downward arrow, followed by the text '0 assets selected.'. Below is a table with columns: 'Name' and 'Type'. One row is listed: 'car_sales_data_sample.csv' (Type: Data Asset). The 'car_sales_data_sample.csv' link is blue and underlined.

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. Below it, the 'Capstone Project' details are shown, including a 'Last Updated: Oct 08, 2020' message and a 'Readme' link. To the right, there are counts for 'Assets' (1) and 'Collaborators' (1). The top right corner features the IBM logo and a dropdown menu.

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

New asset

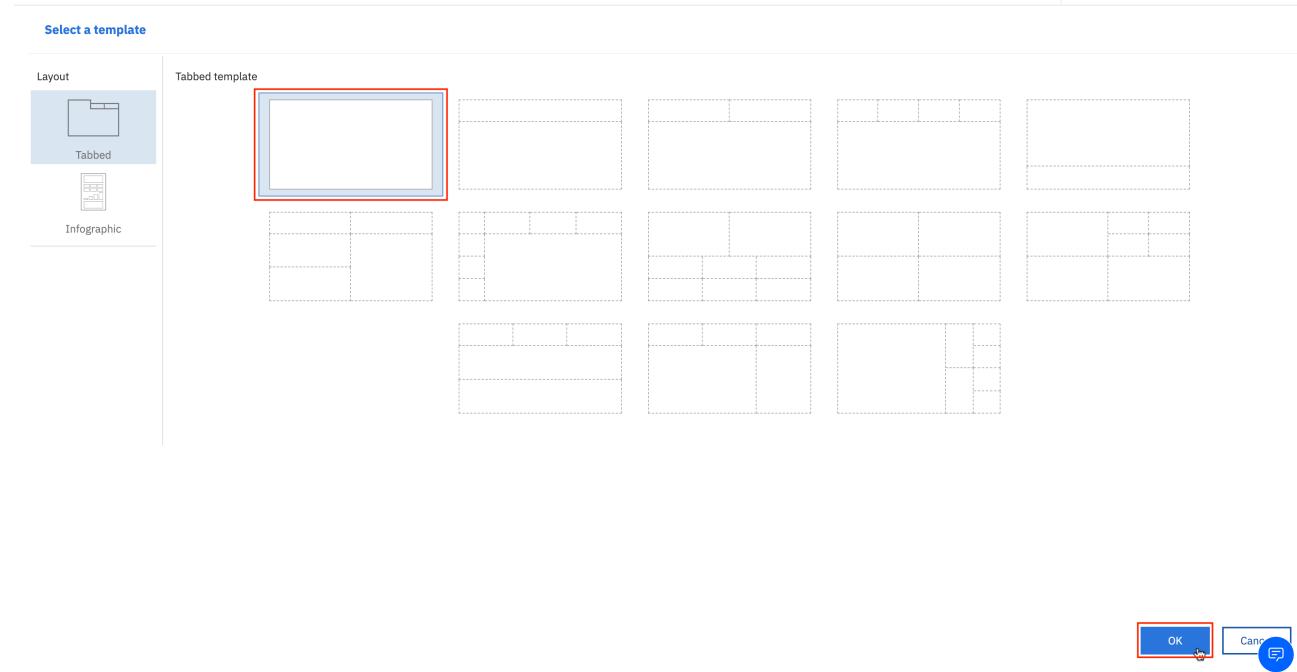
Select the tool to create an operational or configuration asset.

This screenshot shows the 'New asset' selection 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 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. A search bar at the top is labeled 'Find tools by name or purpose'.

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

This screenshot shows the 'New dashboard' creation dialog. At the top, 'Blank' is selected under 'Type'. The 'Name' field is filled with 'Simple Dashboard' (highlighted with a red box). Below it, the 'Description (Optional)' field contains 'Dashboard description'. At the bottom, the 'IBM Cognos Dashboard Embedded service' dropdown is open, showing 'Select Cognos Dashboard Embedded service from the list' and 'IBM Cognos Dashboard Embedded-pe' (highlighted with a red box). The bottom right features 'Cancel' and 'Create' buttons, with 'Create' being highlighted with a red box.

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.

The screenshot shows the Data Studio interface. At the top, there's a navigation bar with icons for back, forward, search, and refresh. Below it is a toolbar with filters, fields, and properties. The main area is titled "Selected sources". On the left, there's a sidebar with a "Sources" tab highlighted by a red box and arrow. A "Select a source" button with a plus sign is visible. The central workspace is labeled "Tab 1" and contains a large grid area for building dashboards. At the bottom right of the workspace is a blue speech bubble icon.

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

Select connection source

This screenshot shows a modal dialog titled "Select connection source". The left pane lists "Capstone Project" with "Assets (2)" and "Connections". The right pane shows "Data assets" with "Data assets (1)" and "car_sales_data_sample.csv" selected. At the bottom right of the dialog are "Cancel" and "Select" buttons, with "Select" being highlighted by a red box and a mouse 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 Studio interface. On the left, the 'Data Source' panel displays a tree structure for 'car_sales_data_sample.csv'. A red box highlights the 'SALES' node under 'ORDERLINENUMBER'. A red arrow points from this node to the 'Panel' area on the right, where a blue box highlights the same 'SALES' node. The 'Panel' area has a placeholder text 'Drag and drop data here to filter all tabs.' and a tab labeled 'Tab 1'.

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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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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