



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

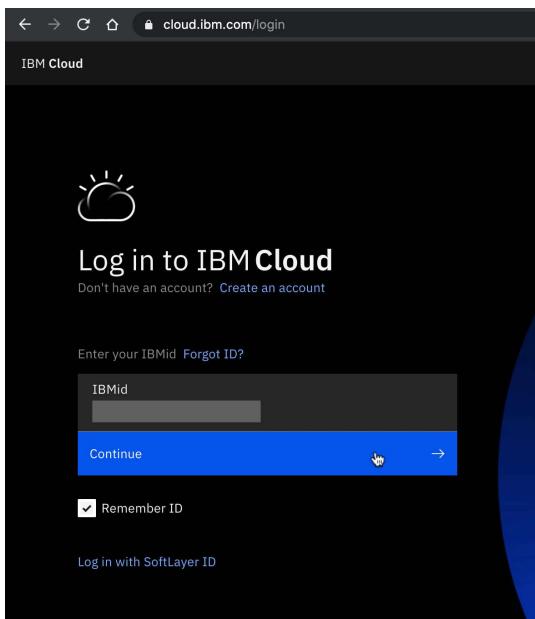
In this exercise, you will how to login to IBM Cloud Pak for Data platform through IBM Cloud and create a project there.

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

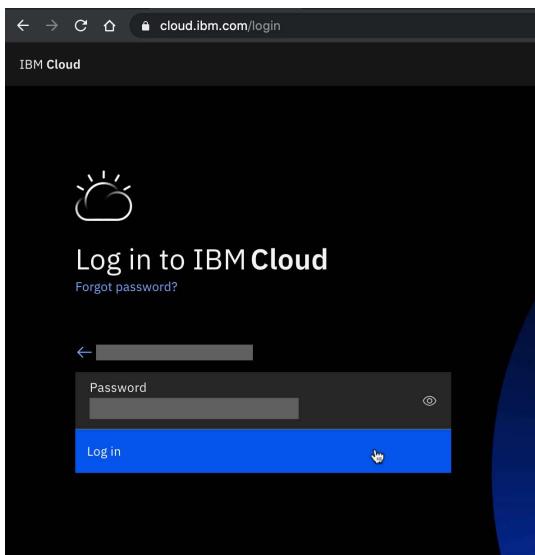
- If you already have an instance of Watson Studio / Cloud Pak for Data, skip Task A.

1. Go to cloud.ibm.com/login.

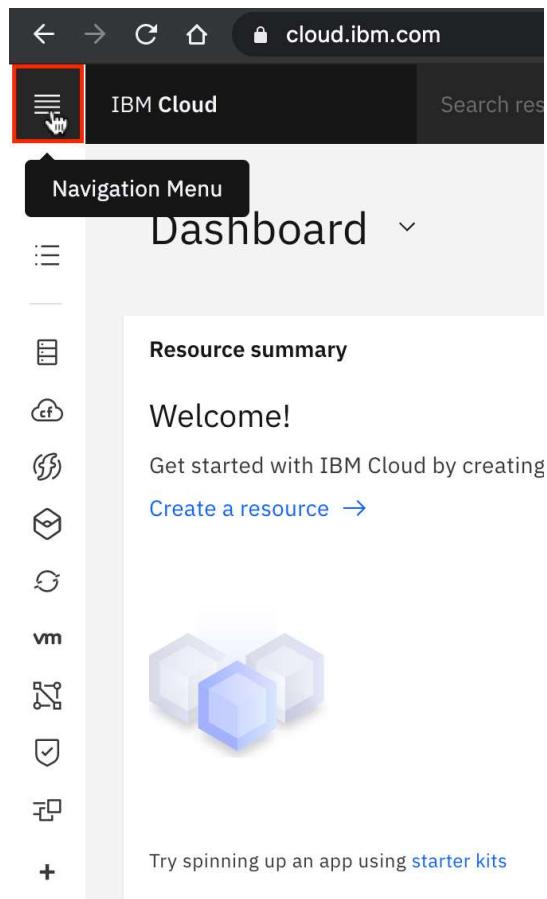
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



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



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



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

The screenshot shows the IBM Cloud dashboard interface. At the top, there's a header bar with icons for back, forward, refresh, and a lock symbol, followed by the URL 'cloud.ibm.com'. Below the header is a dark sidebar containing the 'IBM Cloud' logo and a 'Dashboard' link. The main content area is a light gray page with a vertical navigation menu on the left. The menu items include: 'Classic Infrastructure' (with sub-options: Cloud Foundry, Functions, Kubernetes, OpenShift, VMware, VPC Infrastructure), 'Security and Compliance', 'Code Engine', 'API Management', 'App Development', 'DevOps', 'Interconnectivity', 'Observability', 'Schematics', and several sections for 'Watson' (Apple, Blockchain, Integrate, Managed Solutions). A red box highlights the 'Watson' section. At the bottom of the sidebar, there are three buttons: 'Watson' (highlighted with a red border), 'Watson', and a magnifying glass icon.

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' page. On the left, there's a section titled 'Explore our other offerings' with a 'Watson' button. To its right are two boxes: 'Consult with IBM' and 'IBM Watson Studio'. The 'IBM Watson Studio' box is highlighted with a red border. It contains a brief description, a small icon of a person at a computer, a blue 'Engage us now!' button, and a blue 'Try for free' button with a hand cursor icon. To the right of the 'Watson Studio' box is a small 'Watch a Demo' button with a video camera icon. The top right corner of the page has an 'ASK' button.

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

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](#).

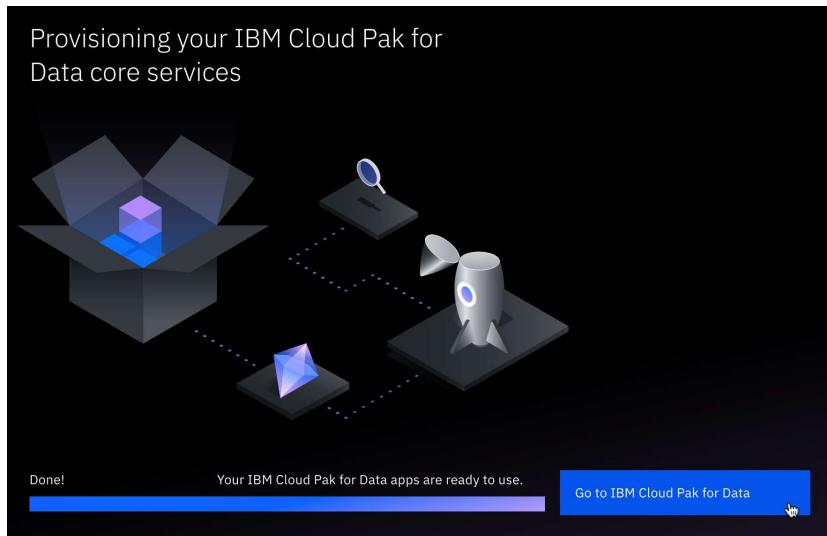
Next →

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**.



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

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

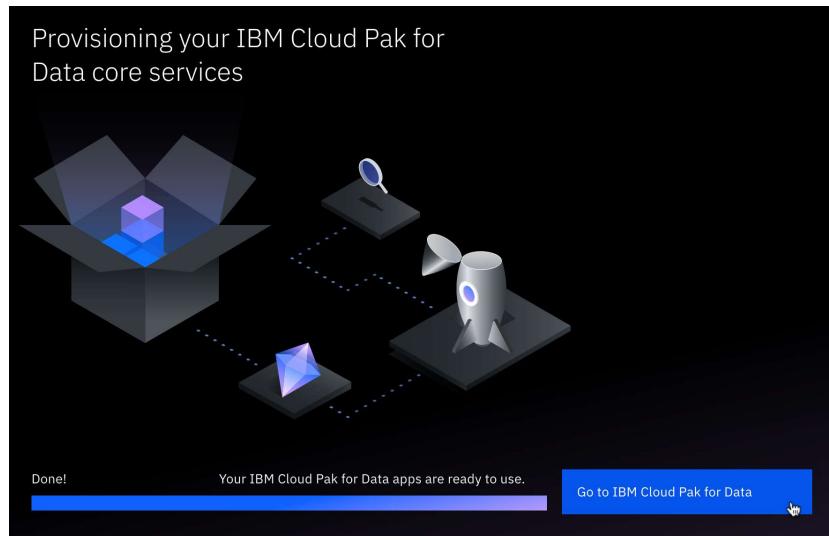
Log in

You will log into Dallas ▾

- Dallas
- London
- Frankfurt
- Tokyo

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

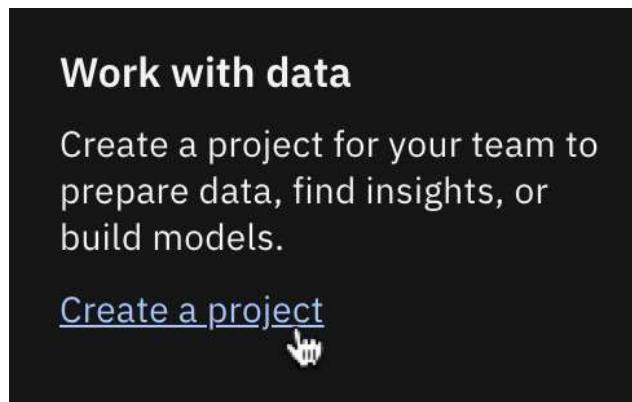
Provisioning your IBM Cloud Pak for Data core services



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**.

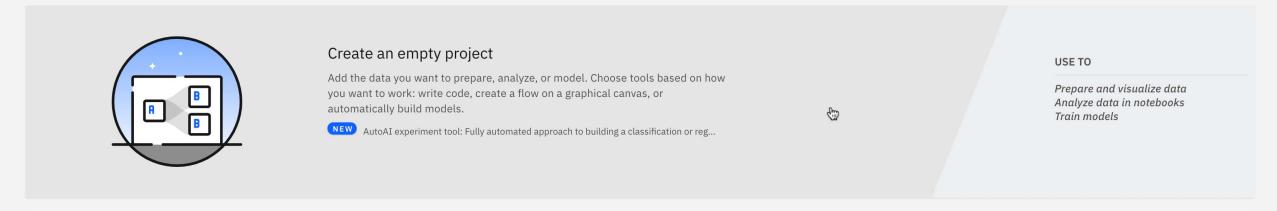


2. Click **Create an empty project**.

[← 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**.

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**.

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.

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 Access Control Settings

Capstone Project
Last Updated: Oct 08, 2020

Readme [View](#)

Overview	Recent activity
Date created Oct 08, 2020	
Description No description available	
Storage 0 Byte used	

0 Assets 1 Collaborators

Alerts related to this project appear here when the project is active.

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, it says "Welcome, Sandip saha!". Below that are three sections: "Learn by example", "Work with data", and "Extend your capabilities". Under "Work with data", there are links to "Create a project" and "Create a service". In the bottom left corner, there's a "Quick navigation" bar with three items: "Projects" (which is highlighted with a red box and a cursor icon), "Deployment spaces", and "Overview". To the right of the navigation bar, the word "Overview" is displayed above "Notifications".

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

The screenshot shows the "Projects" page within IBM Cloud Pak for Data. 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?". Under the search bar, there's a table with one row. The first column is labeled "Name" and contains the link "Capstone Project", which is also highlighted with a red box and a cursor icon.

3. On the **Settings** page, from the **Associated services** section, click **Add service** and select **Dashboard** from the list.

The screenshot shows the "Settings" page for the "Capstone Project". At the top, it says "IBM Cloud Pak for Data" and "Projects / Capstone Project". Below that are tabs for "Overview", "Assets", "Jobs", "Access Control", and "Settings" (which is highlighted with a red box). The main area is divided into sections: "Project information", "Storage", "Associated services", and "Project scope". In the "Associated services" section, there's a table with one row. The "Service type" column shows "Cloud Object Storage" with "0 Bytes used". The "Plan" column shows "Amazon EMR Spark", "IBM Analytics Engine", "Streaming Analytics", and "Dashboard" (which is highlighted with a red box and a cursor icon). A button "Add service" is located at the top right of this section. Below the table, it says "You don't have any Associated services yet".

4. Click **New service**.

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

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

Name	Type	Plan	Location	Status	Group

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

Select a region

Select a region

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

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						<input type="button" value="Associate service"/>	<input type="button" value="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		

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 is a search bar and filter dropdowns for 'Resource Groups', 'Locations', and 'Email'. A user 'sandipsahajoy@ibm.com' is selected. 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). A red box highlights the 'Associated' status in the Status column.

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. Under Load tab, click **browse**.

The screenshot shows the 'Assets' page in IBM Cloud Pak for Data. The top navigation bar includes 'IBM Cloud Pak for Data', 'Projects / Capstone Project', and tabs for 'Overview', 'Assets' (which is selected), 'Jobs', 'Access Control', and 'Settings'. A red box highlights the 'Assets' tab. In the center, there's a search bar and a section for 'Data assets'. A red arrow points from the 'Find and add data' icon (a plus sign with a dashed line) to the 'Load' tab in the sidebar. Another red box highlights the 'Load' tab. A dashed box highlights the 'Drop files here or **BROWSE** for files to upload' area.

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 displays a table with columns: Name and Type. One entry is listed: 'CSV car_sales_data_sample.csv' (Type: Data Asset). A red box highlights the 'car_sales_data_sample.csv' file name.

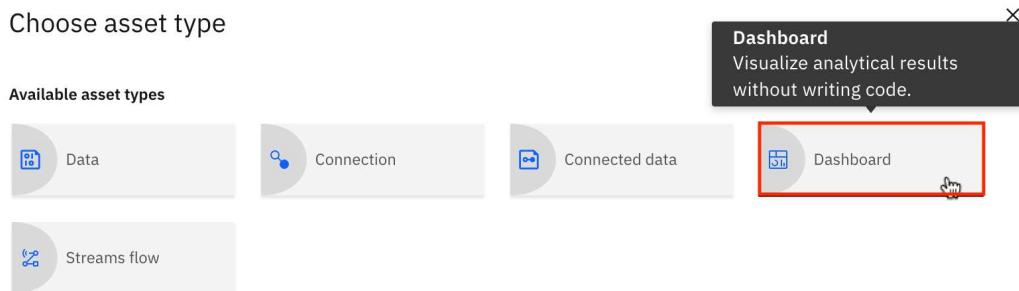
Exercise 3 : Navigate around CDE UI and Start a New Dashboard with a Template

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.

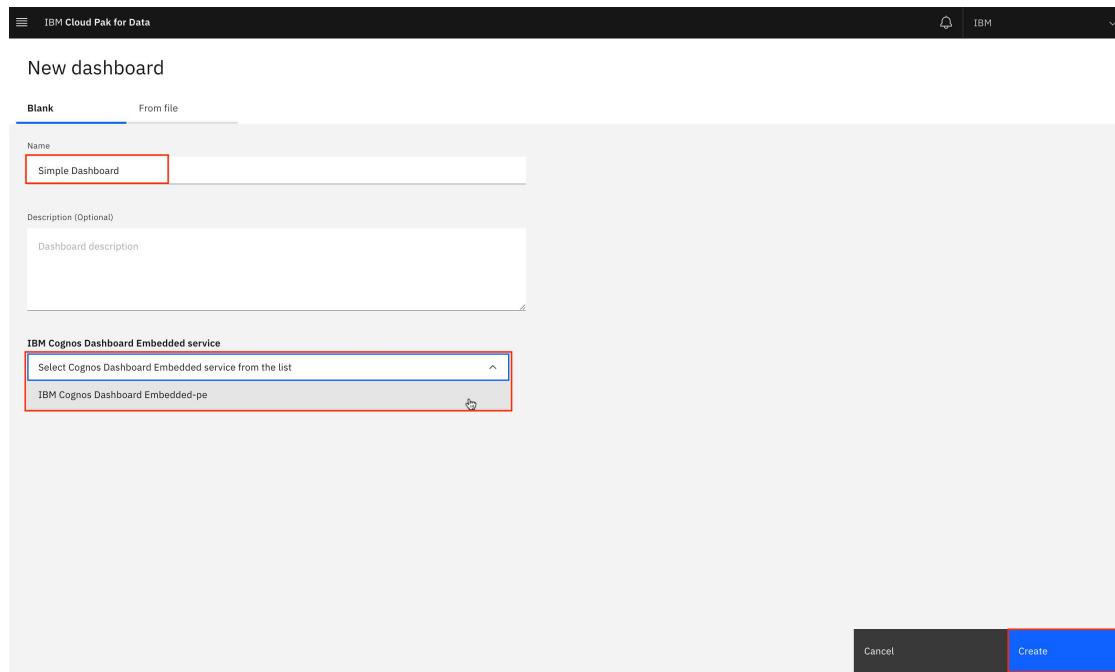
1. On the **Overview** page of Capstone Project project, click **Add to project**.

The screenshot shows the 'Overview' page for the 'Capstone Project'. The top navigation bar includes 'IBM Cloud Pak for Data', 'Projects / Capstone Project', and tabs for 'Overview' (selected), 'Assets', 'Jobs', 'Access Control', and 'Settings'. A red box highlights the 'Add to project' button. Below the tabs, the project name 'Capstone Project' is displayed, along with the last updated date 'Last Updated: Oct 08, 2020'. At the bottom, there are 'Assets' (count 1) and 'Collaborators' (count 1).

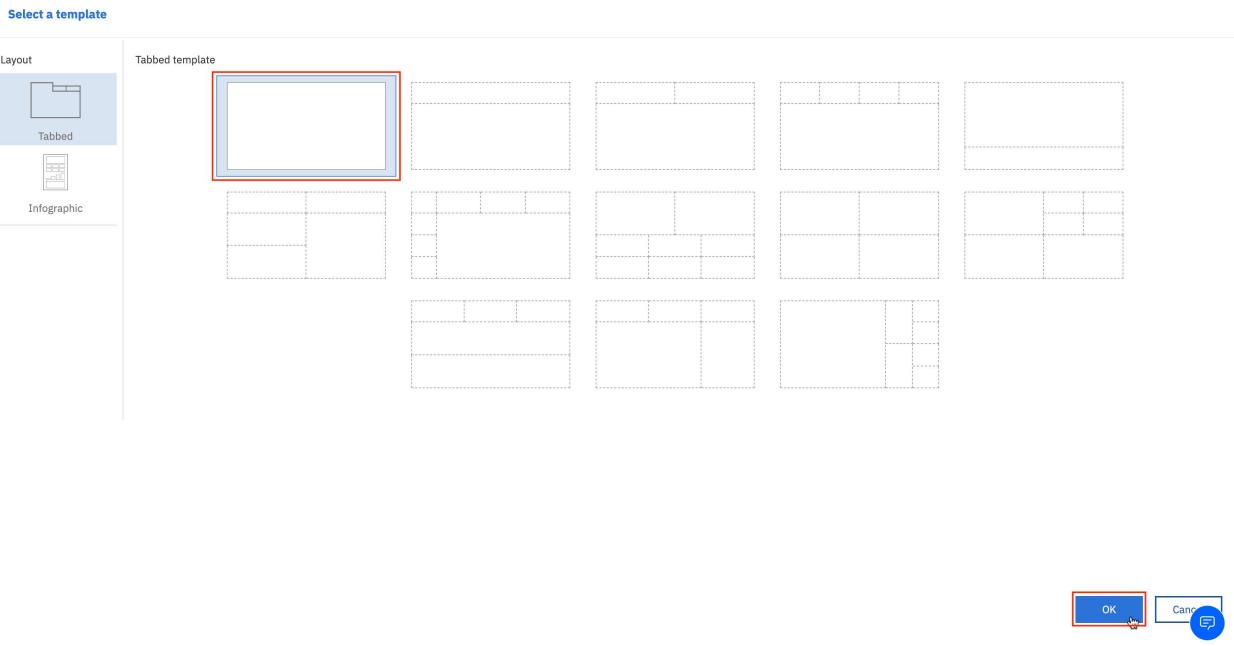
2. Select **Dashboard**.



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

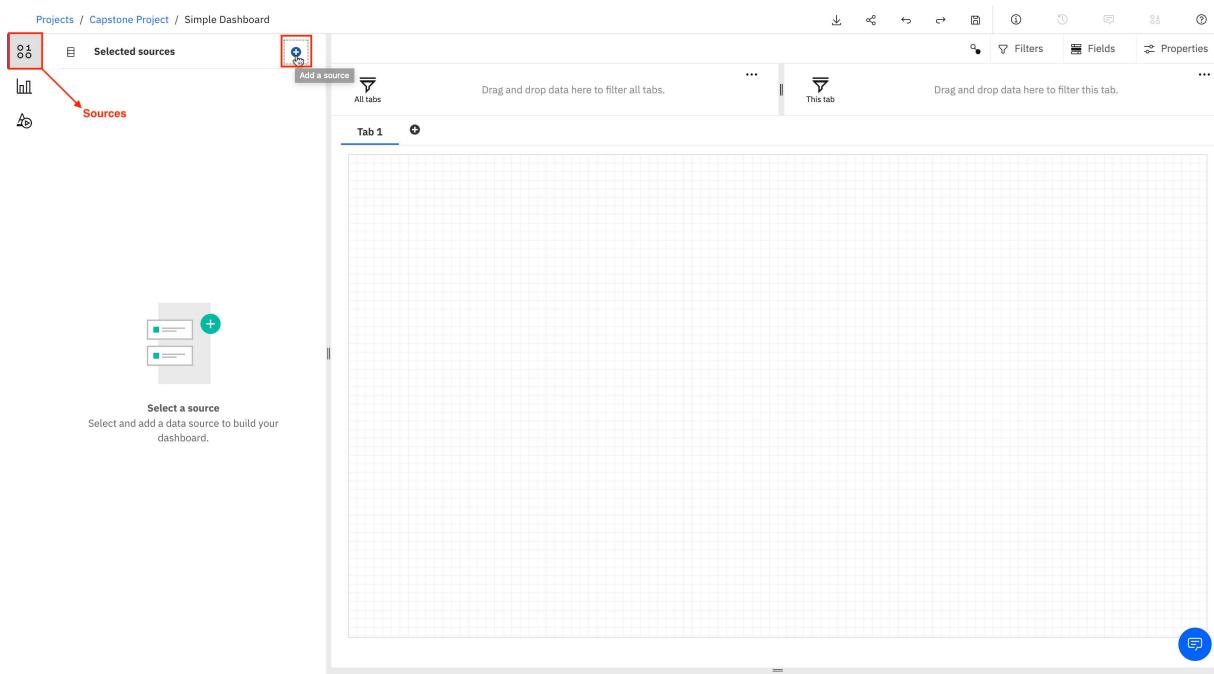


4. Select the **tabbed dashboard style**. This will allow you to have multiple pages for your dashboards. Select the **one-panel template**. Click **OK**.



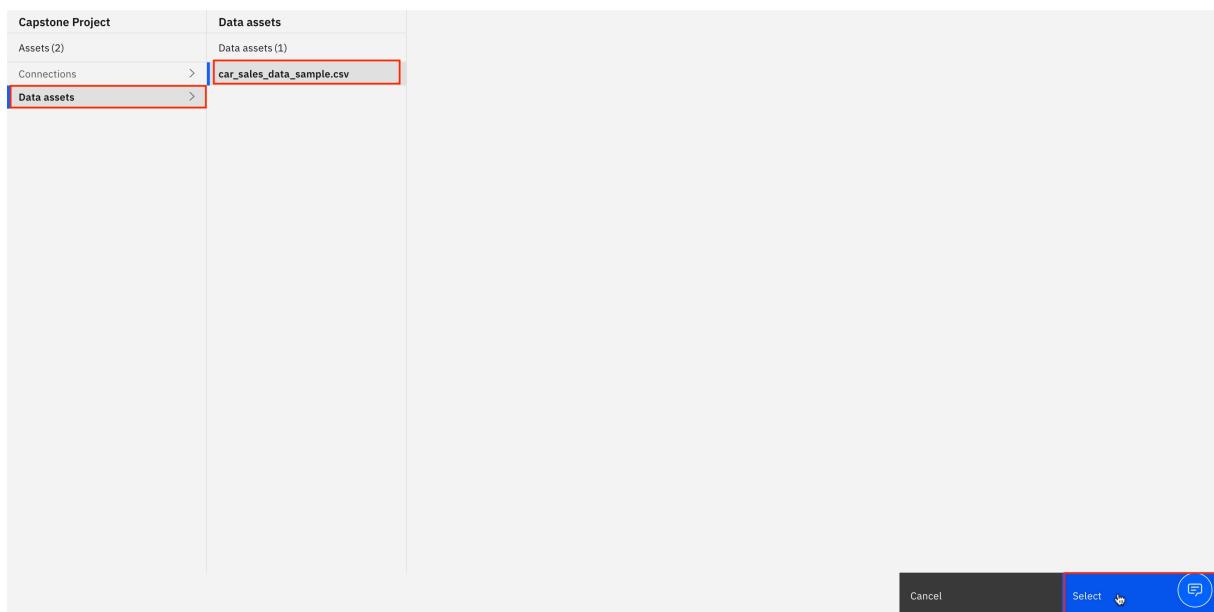
5. Now you have created a new dashboard using the dashboard template.

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

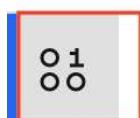


7. Select **Data assets**. Select **car_sales_data_sample.csv** and click **Select**.

Select connection source



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 is open, displaying a tree structure of fields from 'car_sales_data_sample.csv'. A red box highlights the 'SALES' field under the 'car_sales_data_sample.csv' node. A red arrow points from this highlighted field to the right side of the screen. On the right, a dashboard tab titled 'Tab 1' is visible, with a placeholder area labeled 'Drag and drop data here to filter all tabs.' A small blue box contains the 'SALES' icon, which is being dragged into the dashboard area.

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
2020-10-07	1.0	Sandip Saha Joy	Initial version created

© IBM Corporation 2020. All rights reserved.