

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

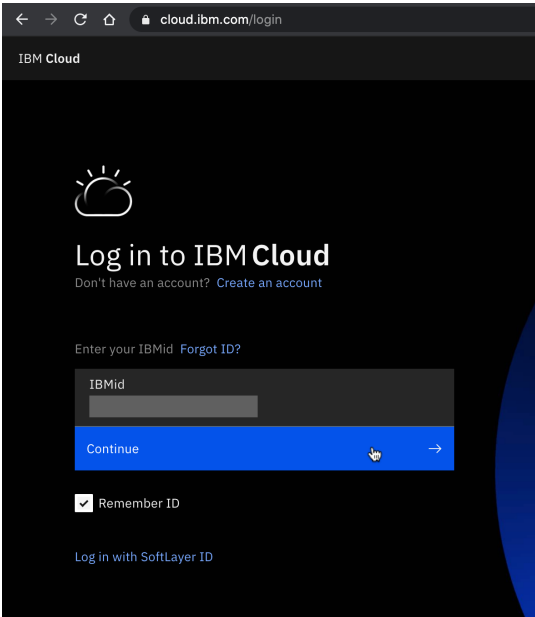
Exercise 1 : Login to IBM Cloud Pak for Data and Create a Project

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

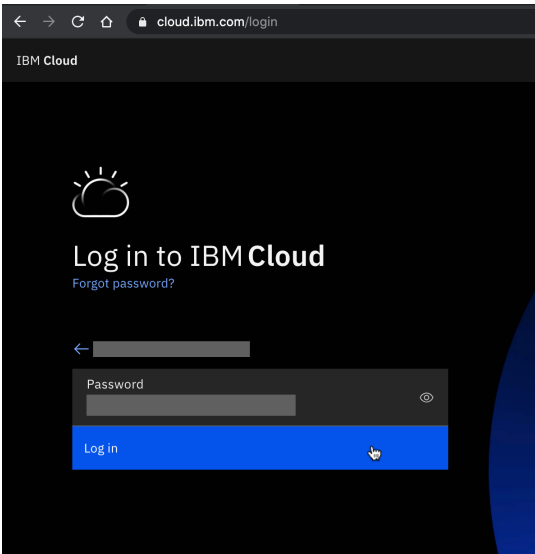
Task A : (optional) Create an Instance of Watson Studio / Cloud Pak for Data

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

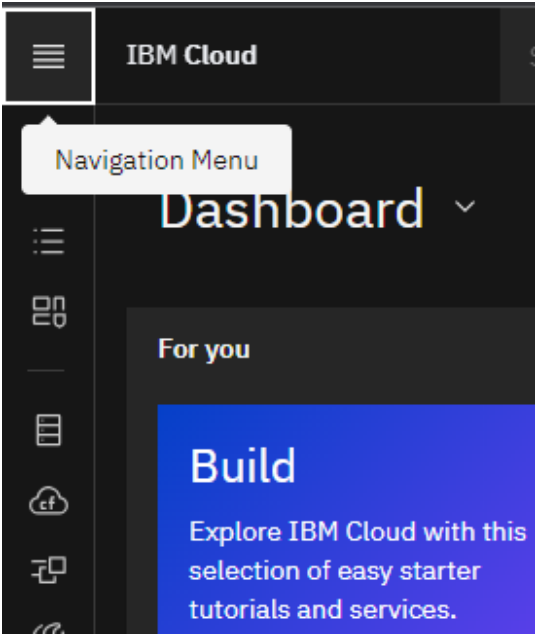
1. Go to cloud.ibm.com/login.
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



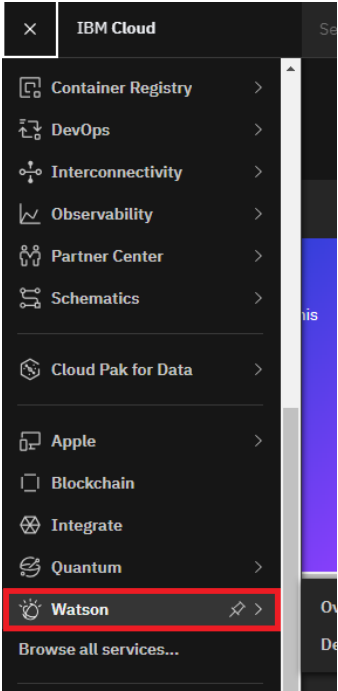
3. Enter your **password** and click **Log in**.



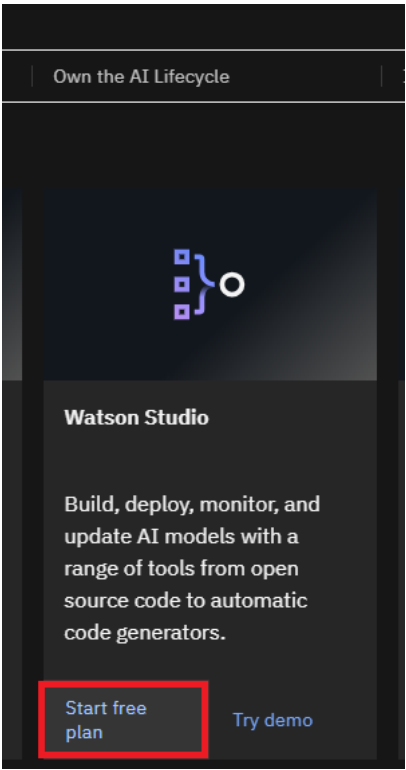
4. Click **Navigation Menu Icon** on the top left side.



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



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

CancelCreate

8. You will be redirected to IBM Cloud Pak (datapatform.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.

IBM Cloud

Dashboard

Resource list

Projects

Classic Infrastructure

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

Resource list

Create resource

Name	Group	Location	Product	Status	Tags
Filter by name or IP address...	Filter by group or org...	Filter...	Filter...	Filter...	Filter...
Converged infrastructure (0)					
Enterprise applications (0)					
AI / Machine Learning (3)					
Instance1	Default	Frankfurt	Watson Studio	Active	—
KnowledgeCatalog	Default	Dallas	Watson Knowledge Catalog	Active	1
WatsonOpenScale	Default	Dallas	Watson OpenScale	Active	1
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...

Catalog

Resource list /

Instance1ActiveAdd tags

Manage

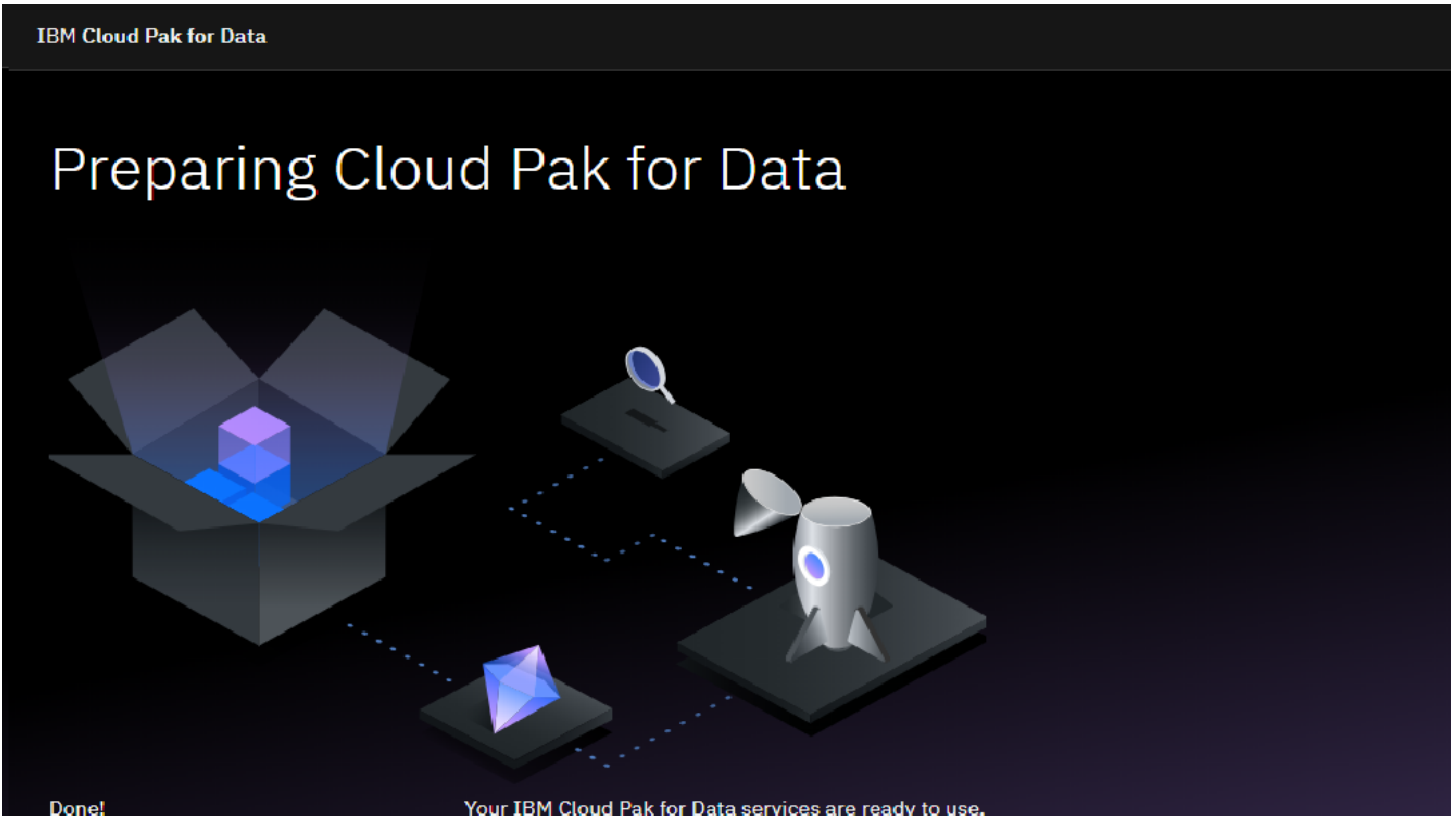
Plan

Watson Studio in Cloud Pak for Data

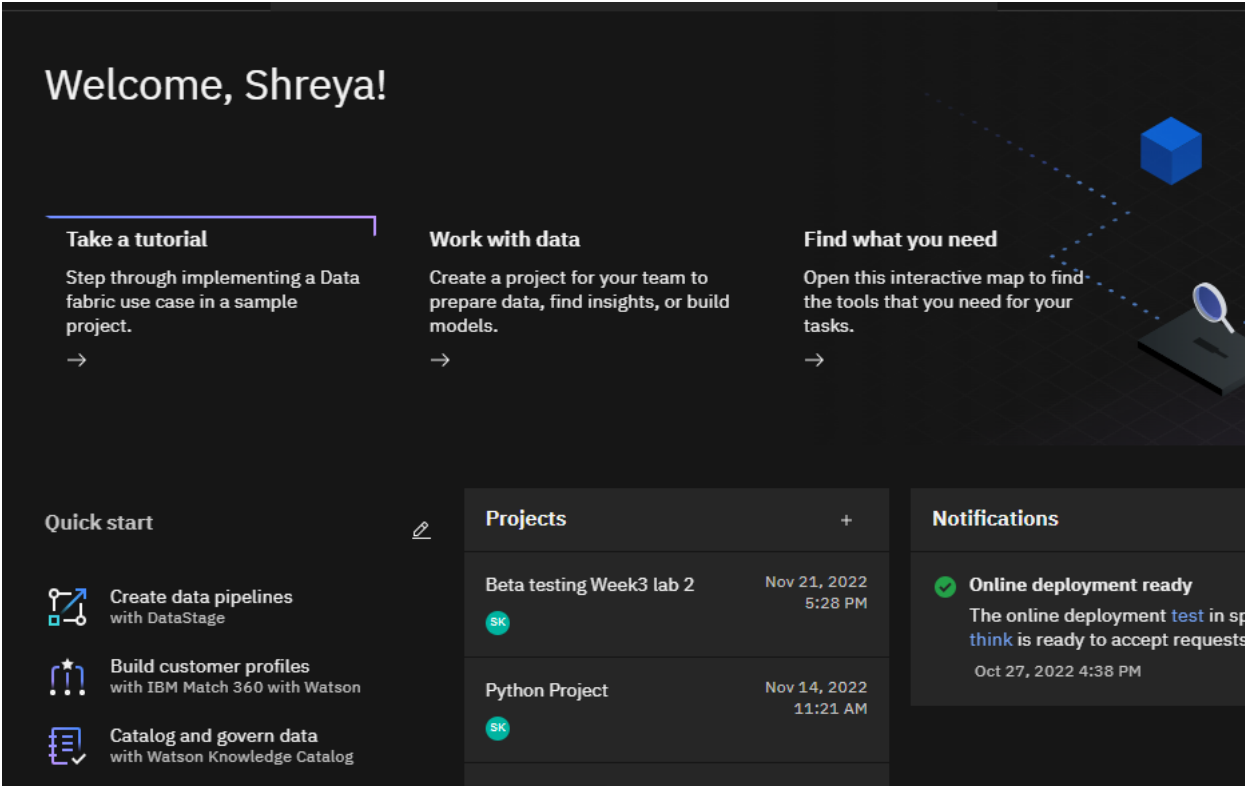
Watson Studio is one of the core services in Cloud Pak for Data as a Service. Build, deploy and manage AI models, and optimize decisions on IBM Cloud Pak for Data.

Launch in IBM Cloud Pak for Data

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

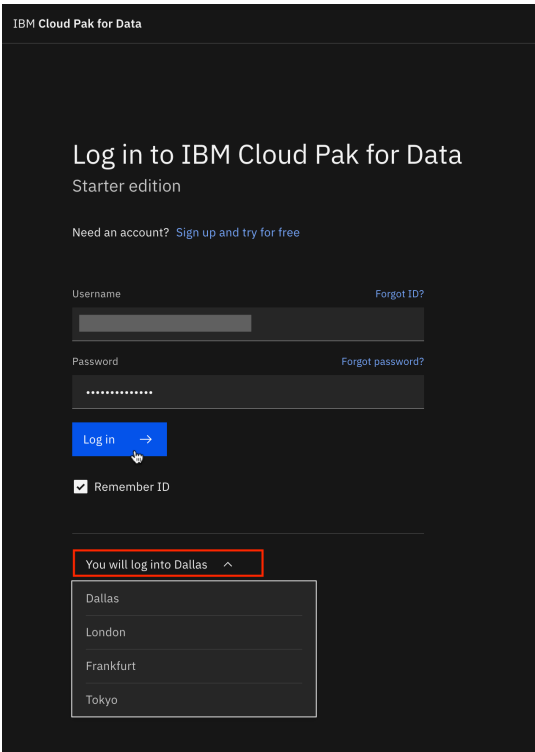


12. You have successfully logged in to the IBM Cloud Pak for Data platform.

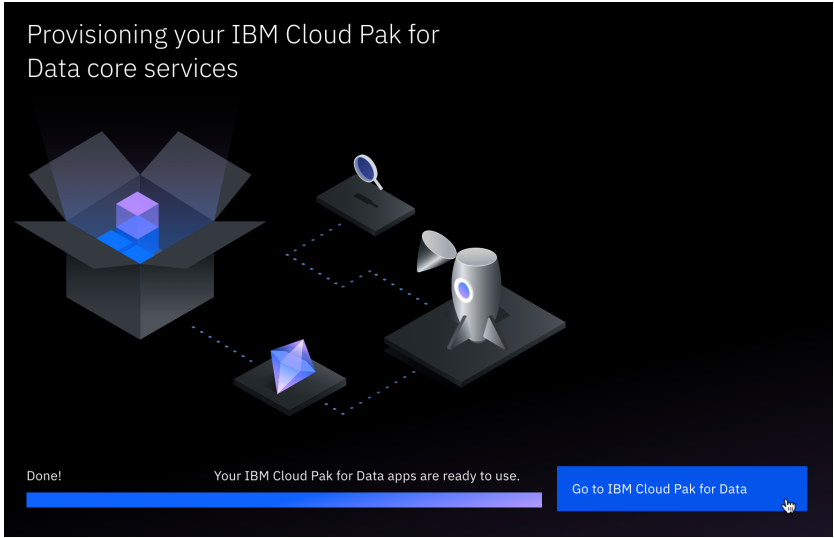


Task B : Login to IBM Cloud Pak for Data

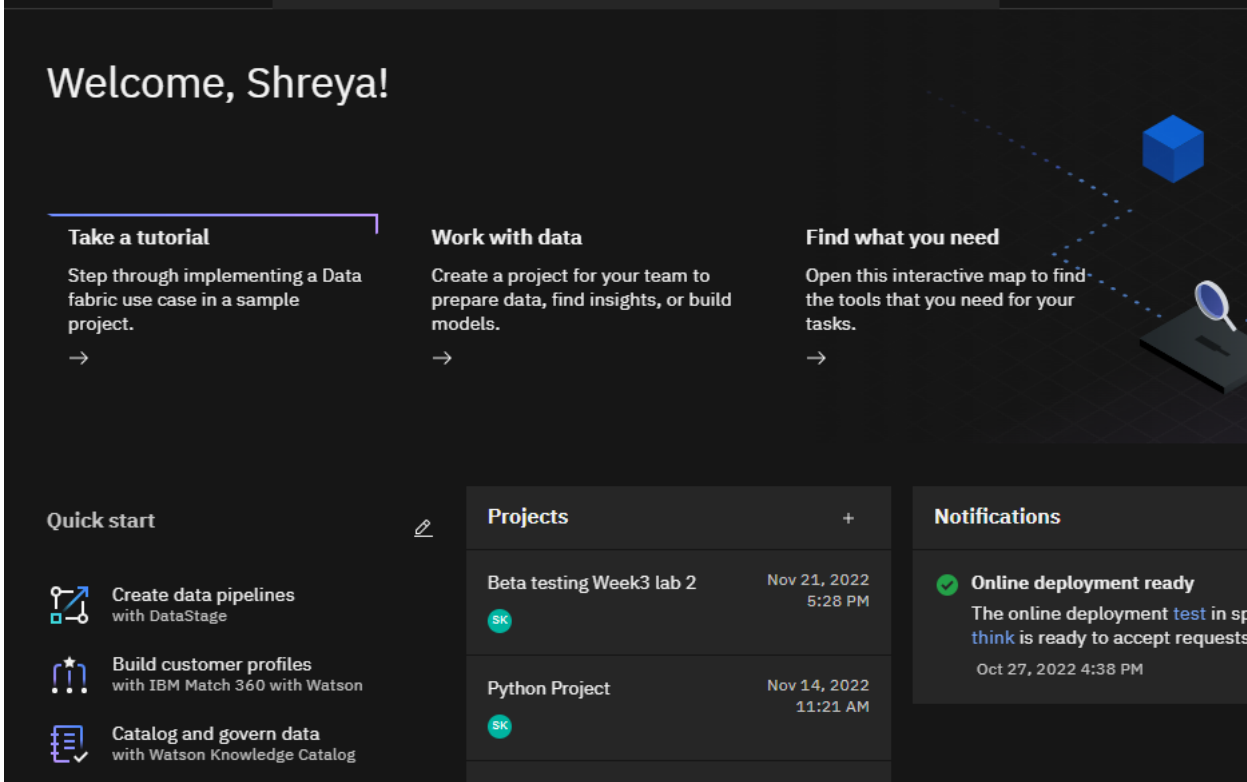
- If you just completed Task A, you will already be logged in, so skip Task B.
1. Go to dataplatfom.cloud.ibm.com.
 2. Enter your **IBM**id (the email ID you used to sign up for IBM Cloud), **password** and select a **region**, same one you used for IBM Cloud account and IBM Cloud Pak for Data(if you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



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

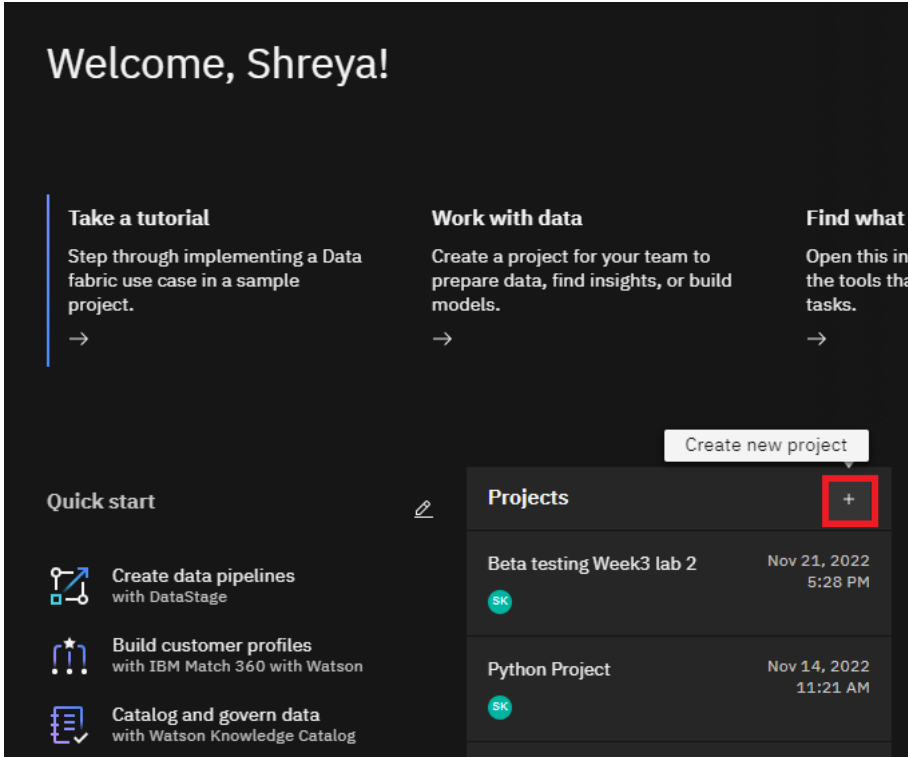


4. You have successfully logged in to the IBM Cloud Pak for Data platform.



Task C : Create a New Project

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

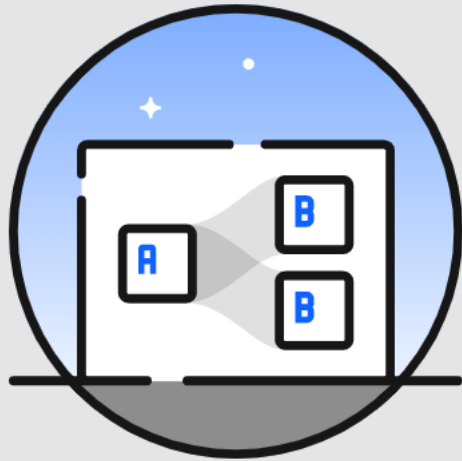


2. Click **Create an empty project**.

[← Back](#)

Create a project

Choose whether to create an empty project or to preload your project with data and analytical assets. Add collaborators to help you accomplish your goals. Add services as necessary.



Create an empty project

Add the data you want to prepare, analyze, or model. You can also add the data you want to work: write code, create a flow on a graph, or let AutoAI automatically build models.

NEW AutoAI experiment tool: Fully automated approach to building models

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

Sandip Saha Joy's Account

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-ru

Select a 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

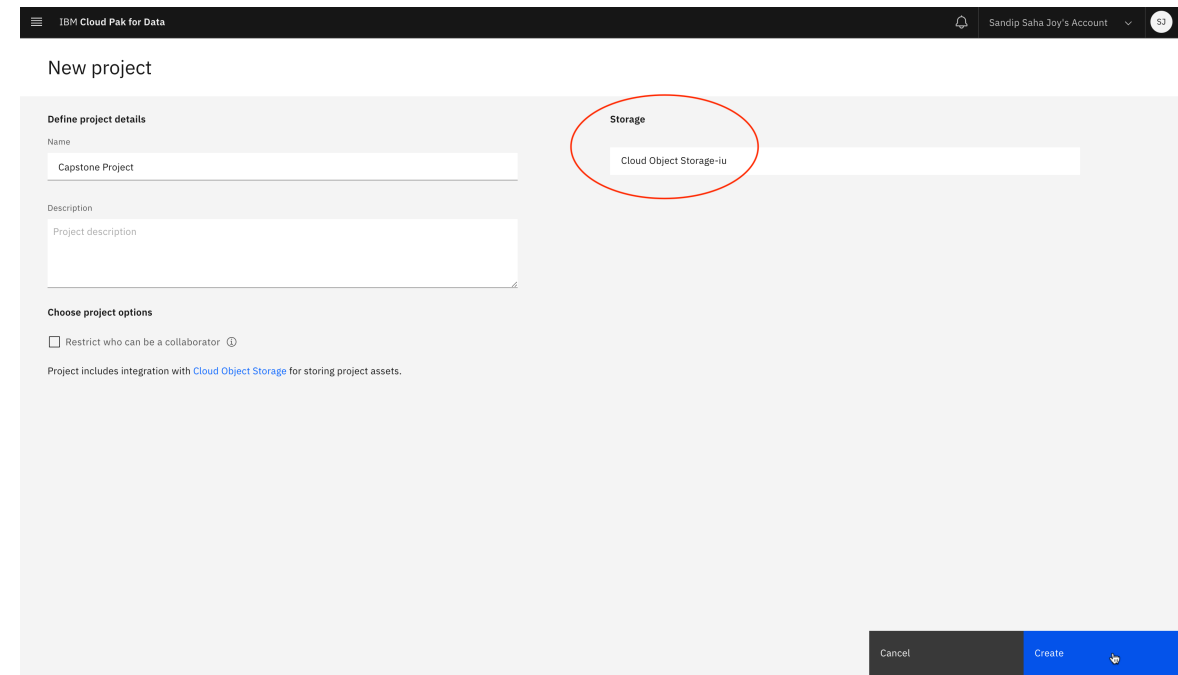
1 Select storage service

Add

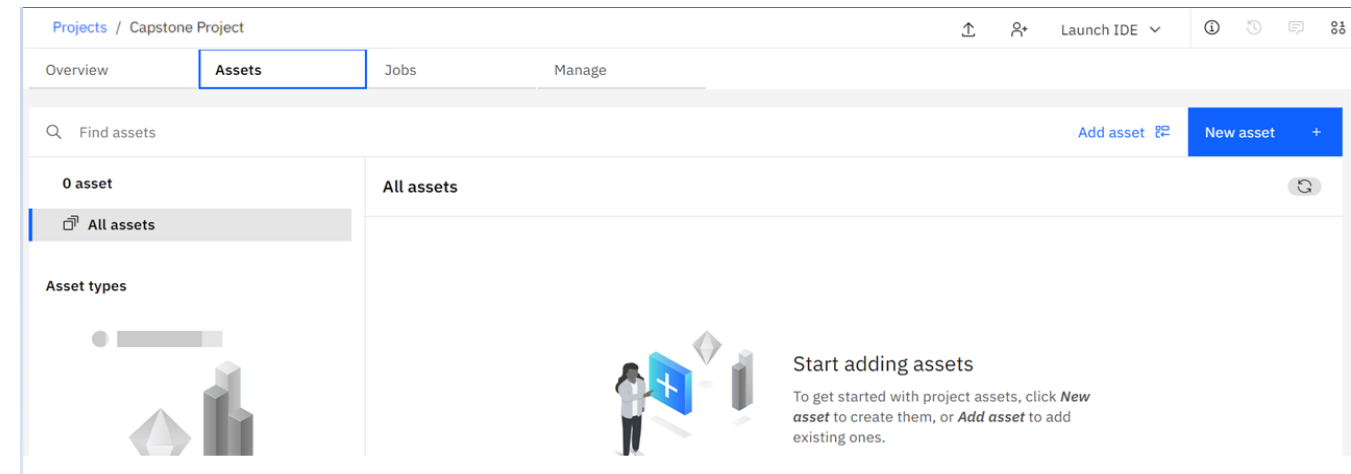
Add an object storage instance, and then return to this page and click Refresh.

2 Refresh

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



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

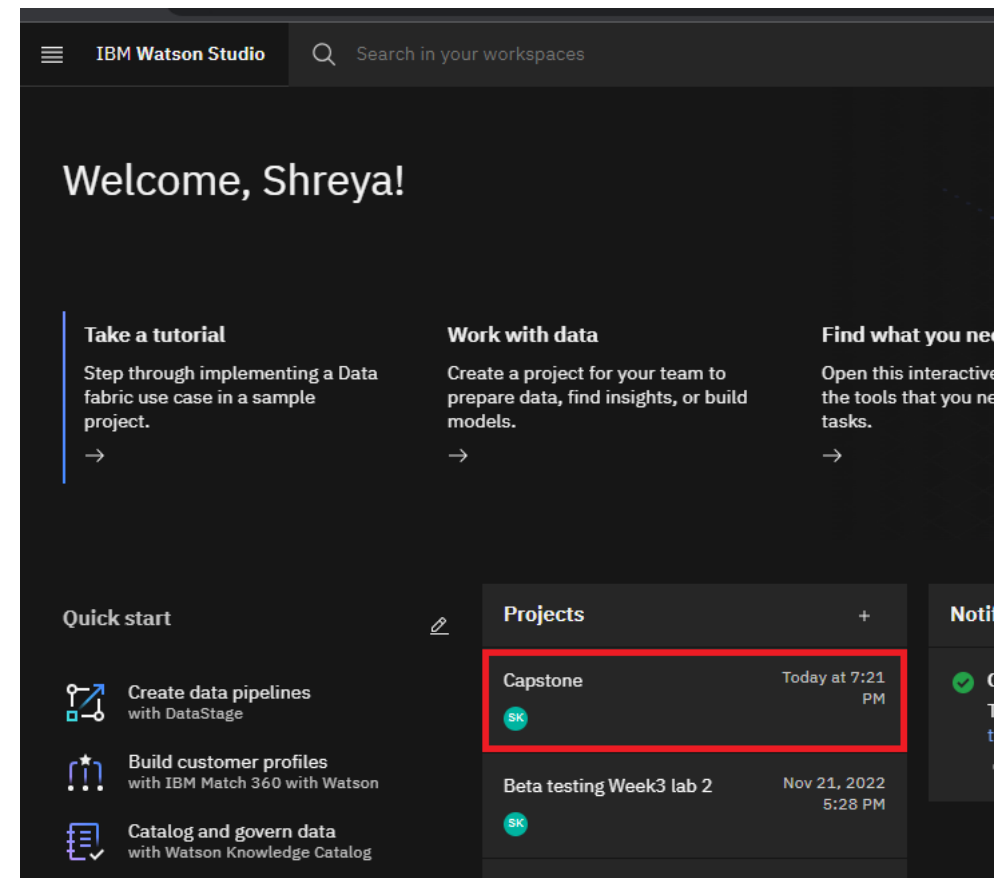


Exercise 2 : Add a CDE service and Upload External Data

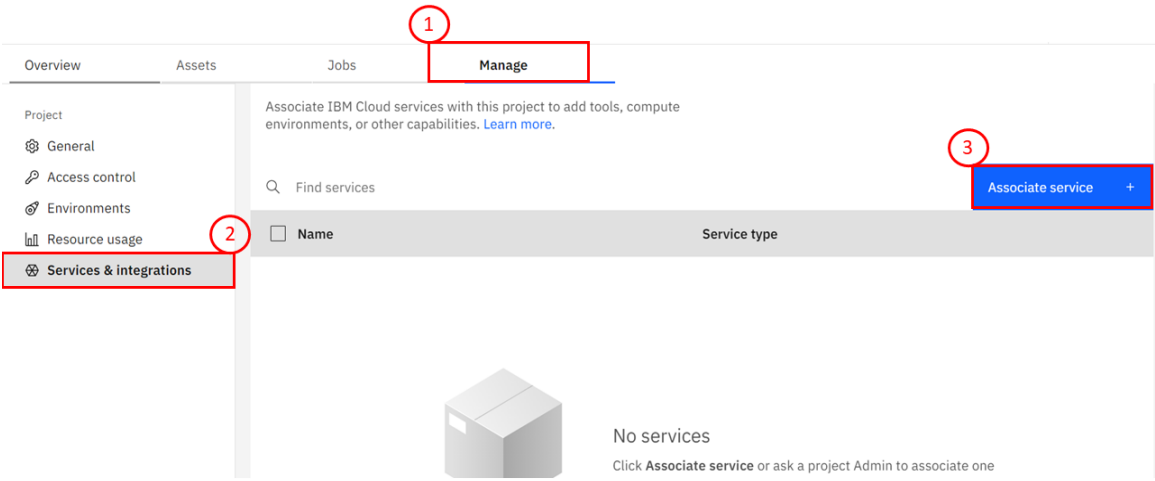
In this exercise, you will learn how to add a Cognos Dashboard Embedded (CDE) service and upload external data files to your project.

Task A : Add a CDE service

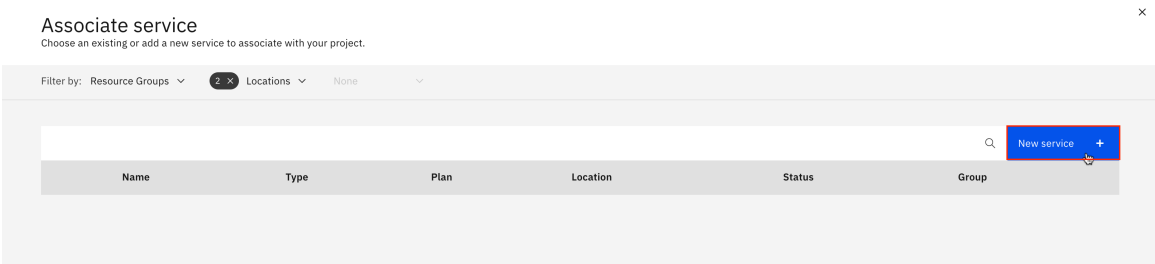
1. From IBM Cloud Pak for Data homepage, got to **Projects** under Quick navigation and click on the Capstone project you had created earlier



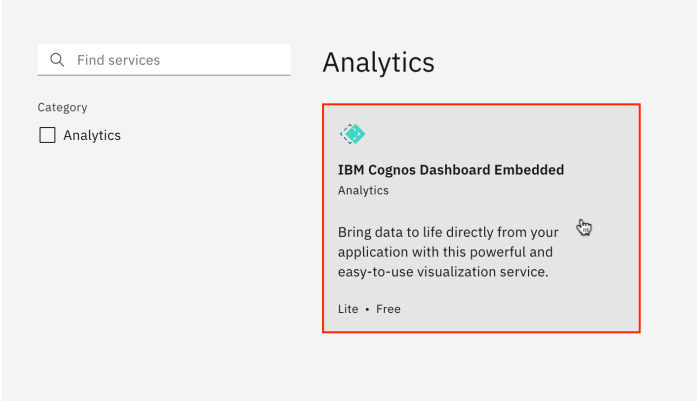
2. Click on **Manage** tab , from the **Services and integrations** section click **Associate service**



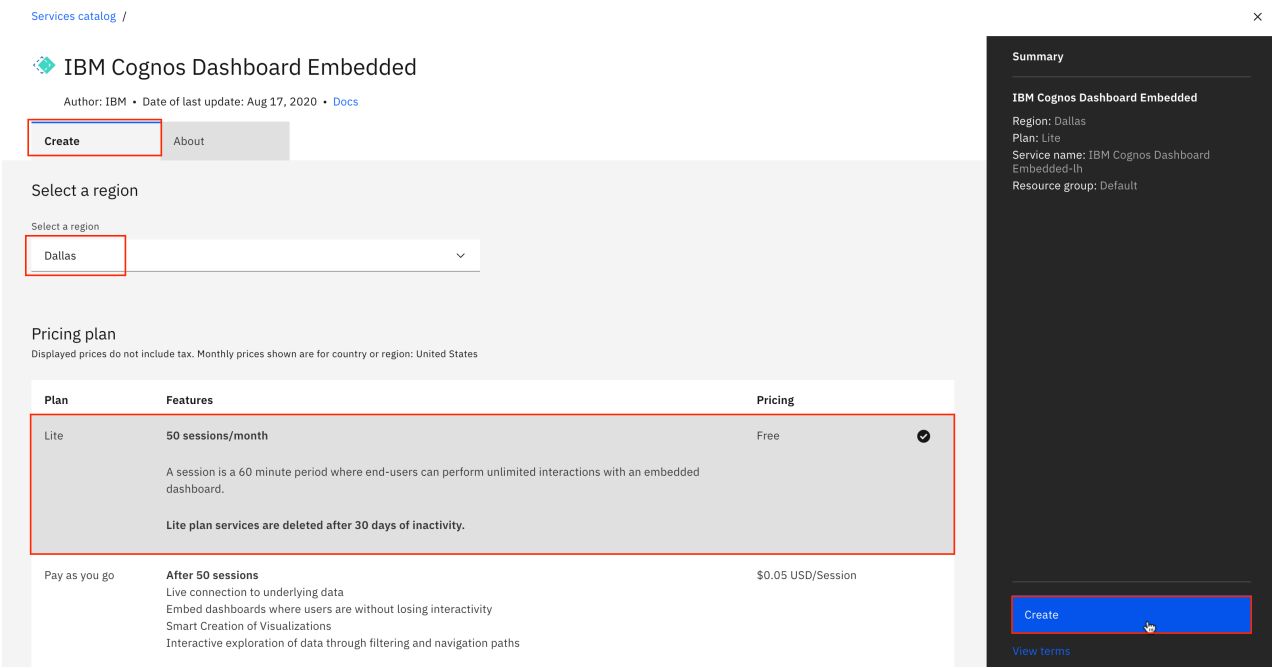
3. Click **New service**.



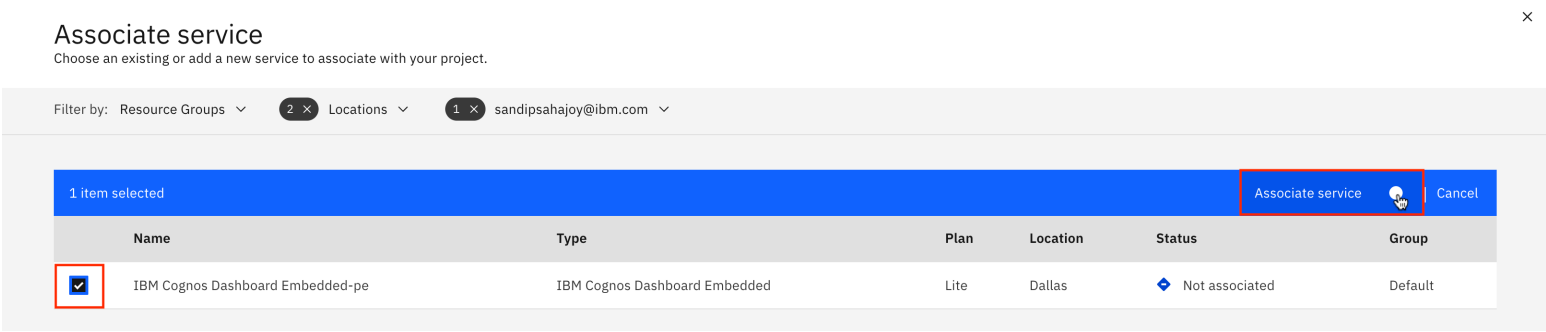
4. Click **IBM Cognos Dashboard Embedded**.



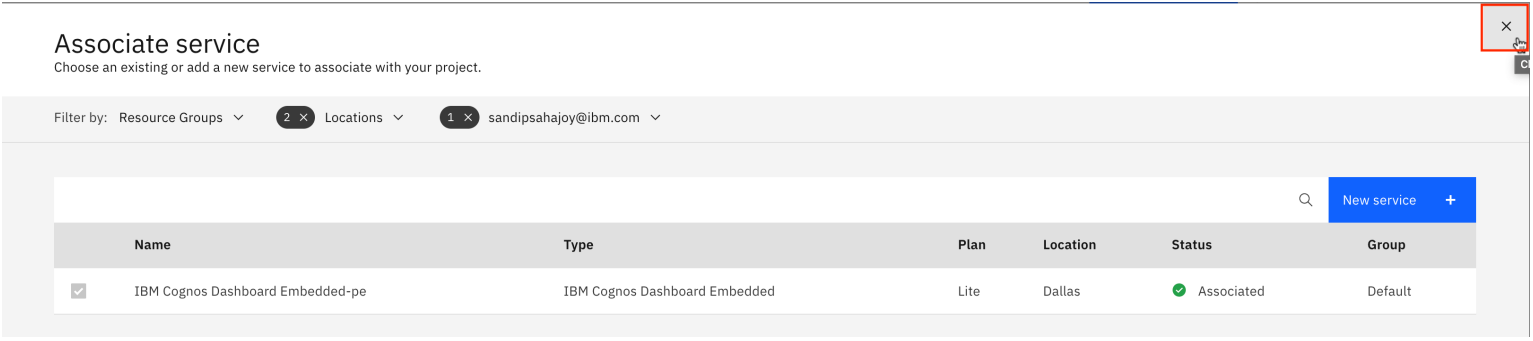
5. On the **Create** tab, select a **region** and **Lite** plan. Then click **Create**.



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

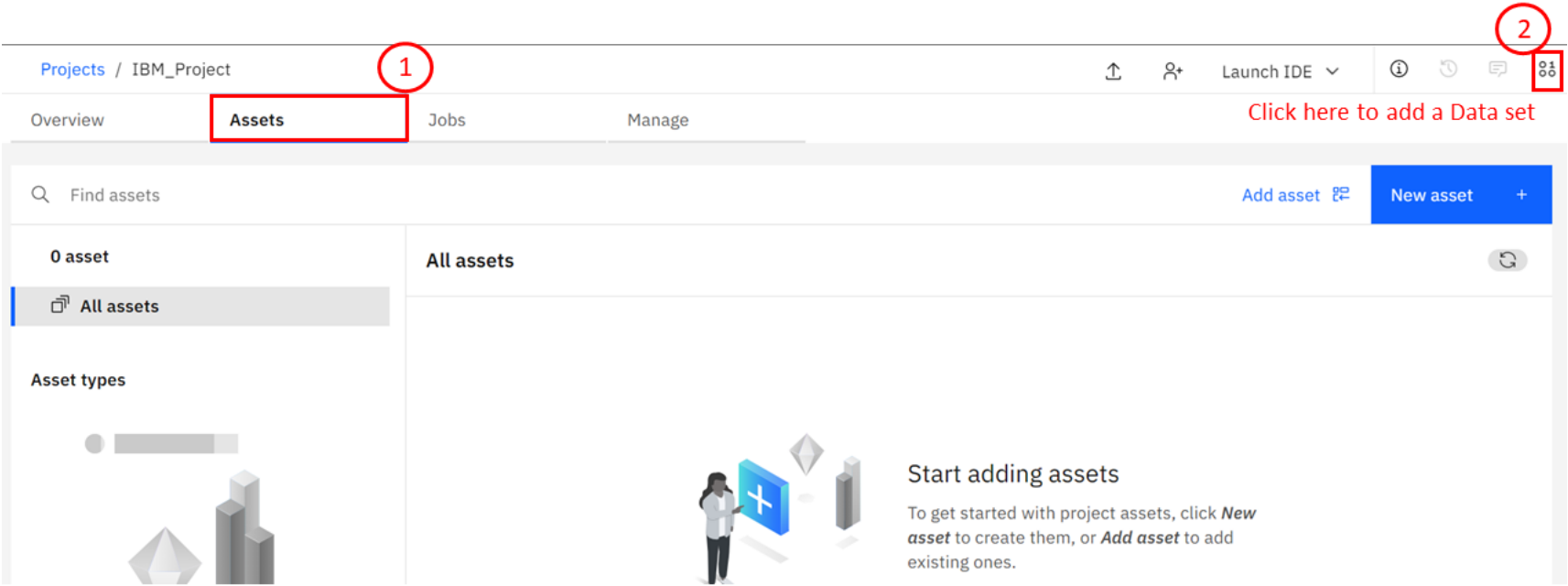


7. Once the service association status appears green, **close** the associate service page.

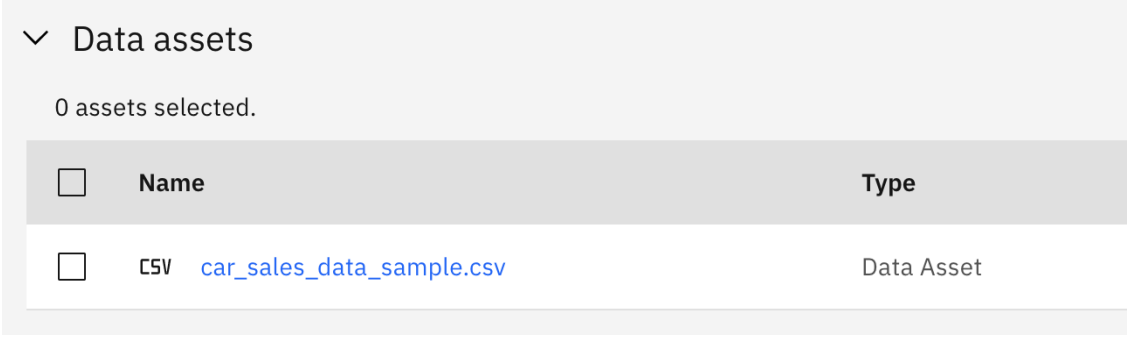


Task B : Upload External Data Files(Supports .CSV Files Only)

- 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**.



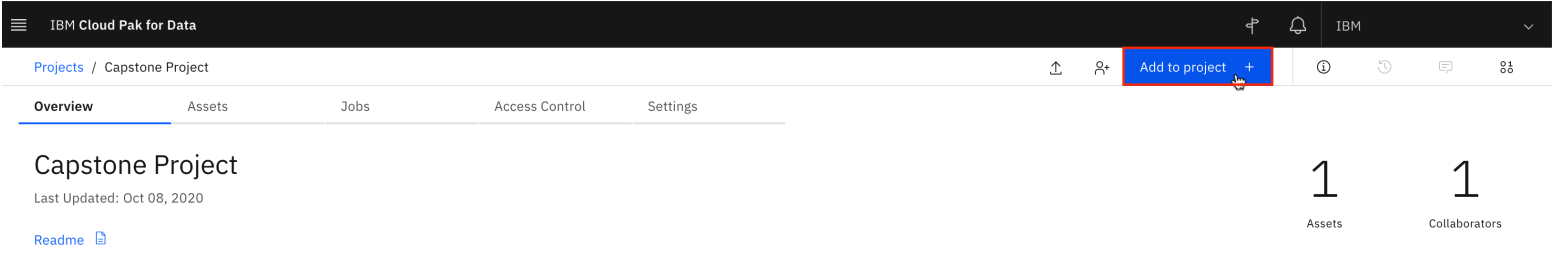
- 3. Browse to the file download location, select the downloaded **CSV** file, and click **Open**.
- 4. Once upload completes, **car_sales_data_sample.csv** will appear under **Data assets** section.



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**.

New asset

Select the tool to create an operational or configuration asset.

Tool type

All typesAutomatic buildersGraphical canvasCode editorsOther

Find tools by name or purpose

Dashboard editor

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

Data Refinery

Create a flow of ordered operations to cleanse and shape data. Visualize data to identify problems and discover insights.

Decision Optimization

Create and manage scenarios to find the best solution to your optimization problem by comparing different combinations of your model, data, and solutions.

Pipelines

Automate the model lifecycle, including preparing data, training models, and creating deployments.

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

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

New dashboard

BlankFrom 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

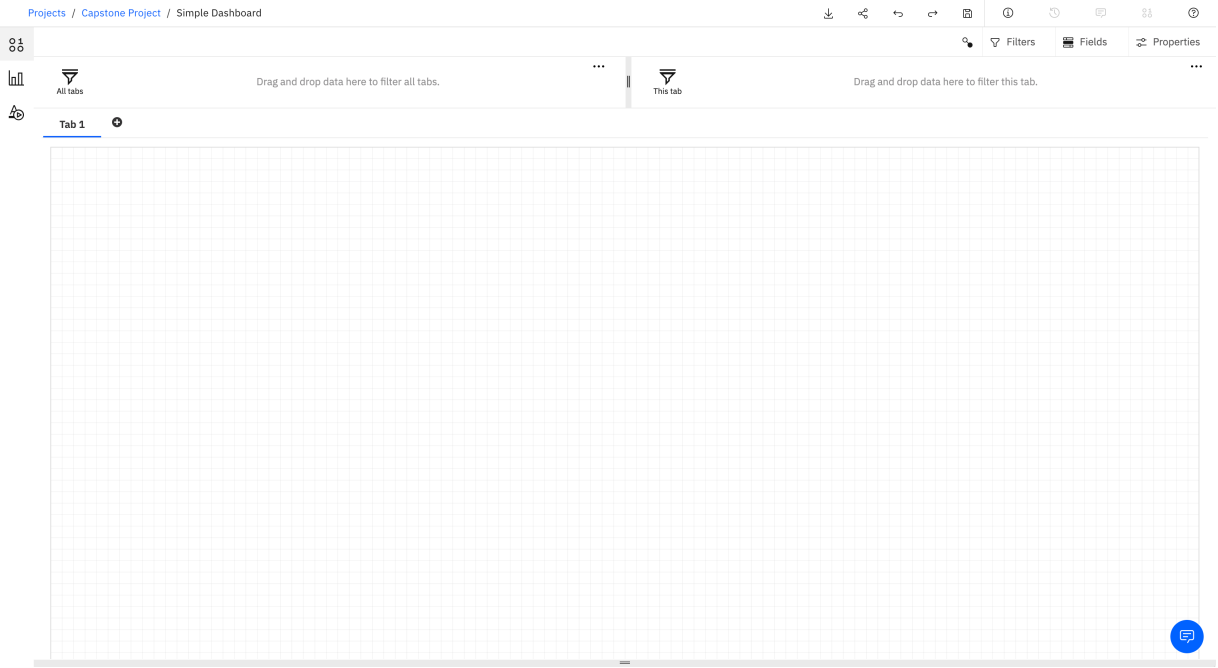
TabbedInfographic

Tabbed template

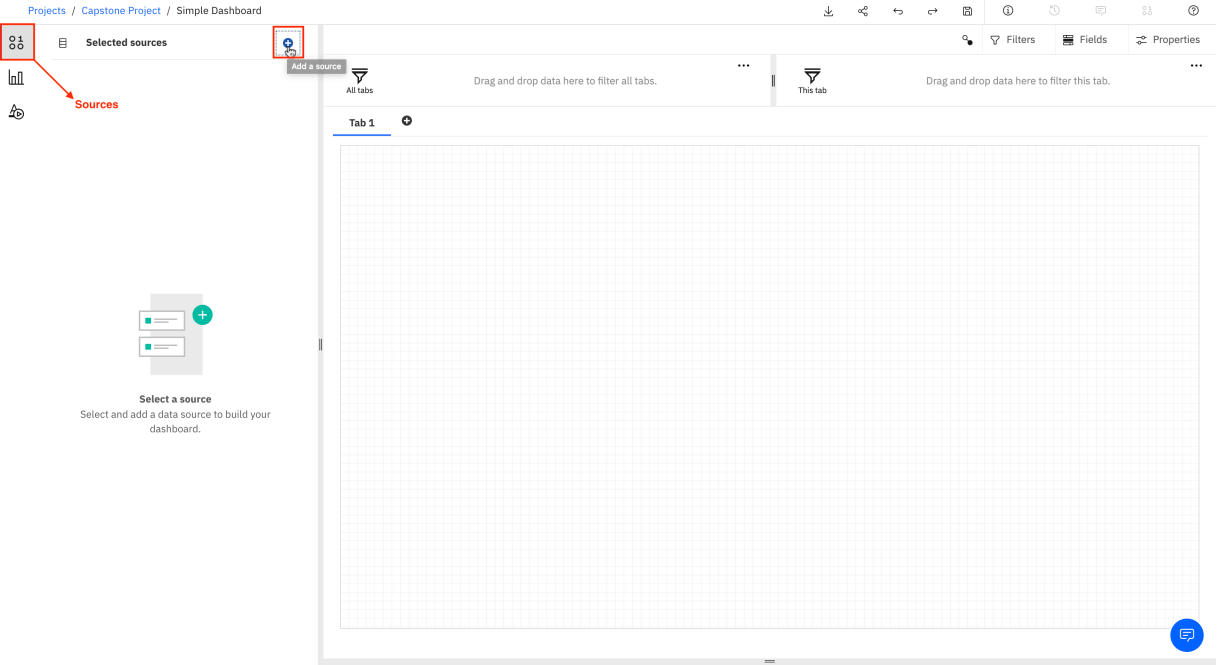
OK

Cancel

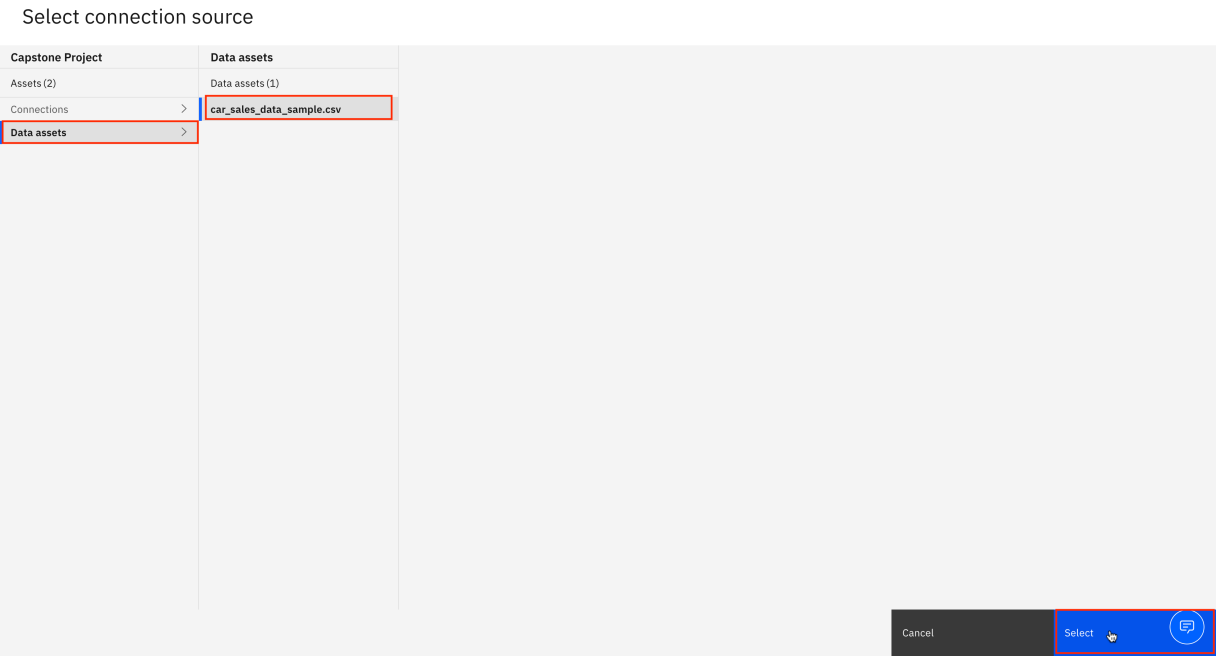
5. Now you have created a new dashboard using the dashboard template.



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



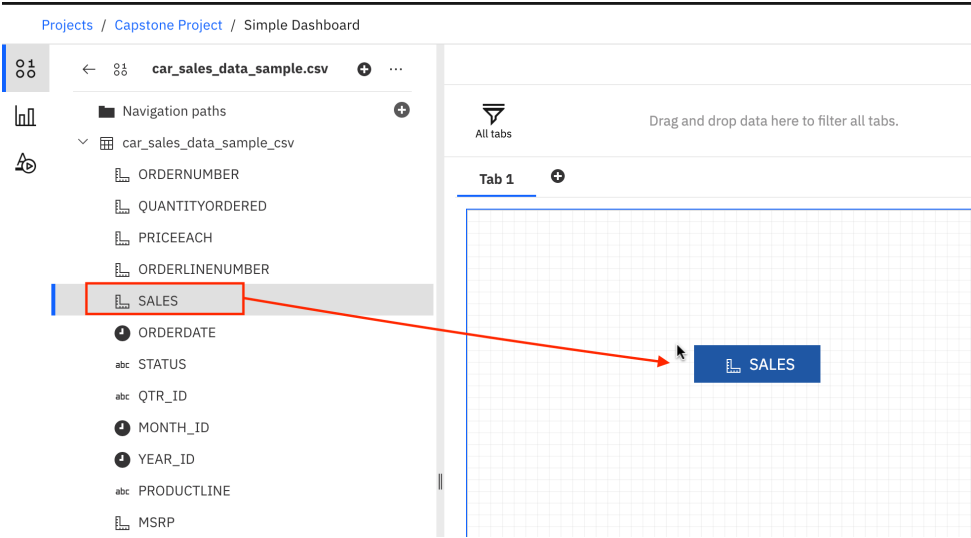
7. Select **Data assets**. Select **car_sales_data_sample.csv** and click **Select**.



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!



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