



Customize appearance

Skills Network Editor

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

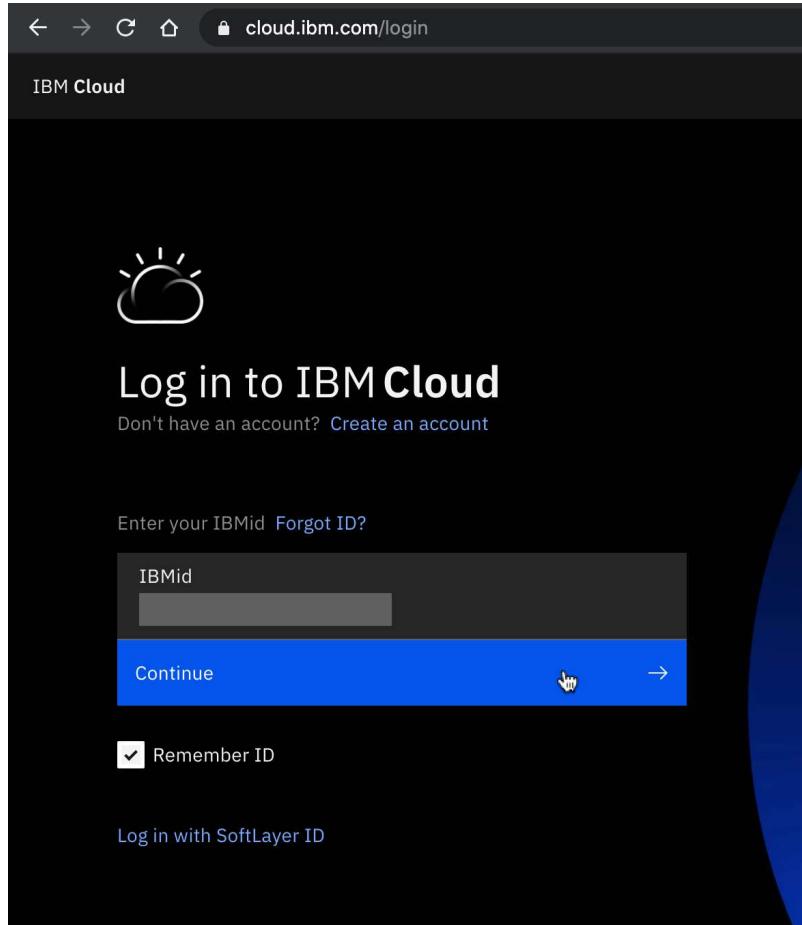
In this exercise, you will how to login to IBM Cloud Pak for Data platform through IBM Cloud and create a project there.

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

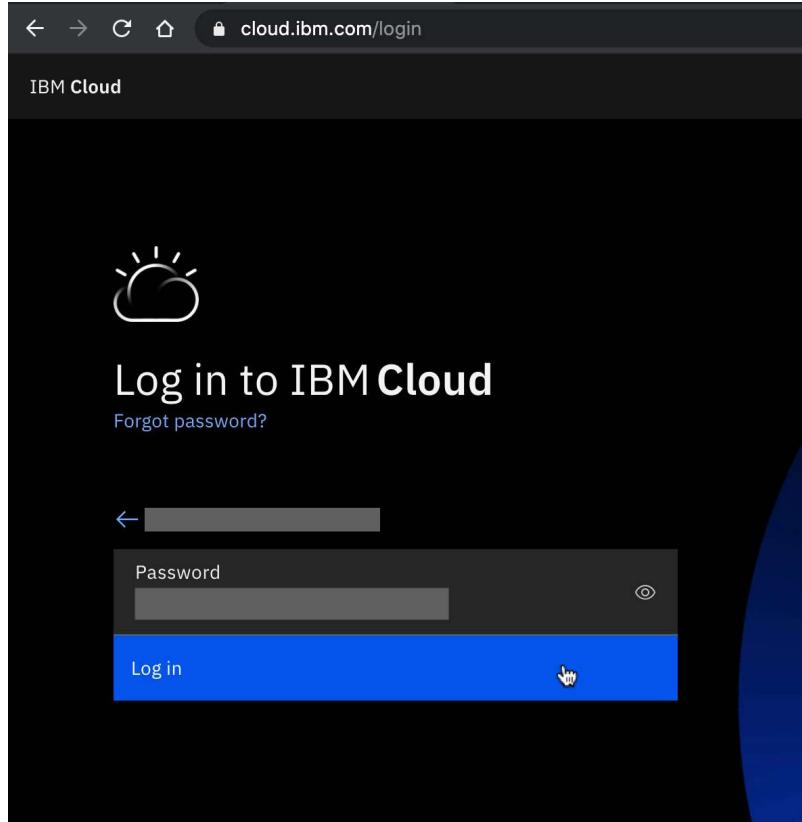
- [If you already have an instance of Watson Studio / Cloud Pak for Data , skip Task A.](#)

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

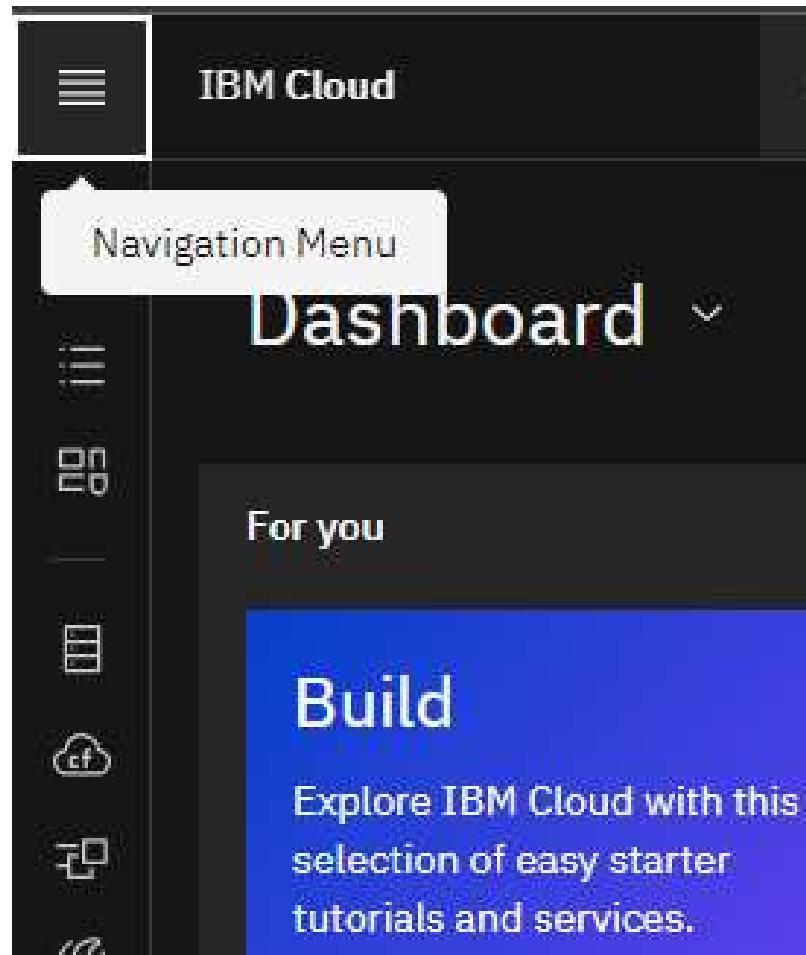
2. Enter your **IBMid** (the email ID you used to sign up for IBM Cloud) and click **Continue**.



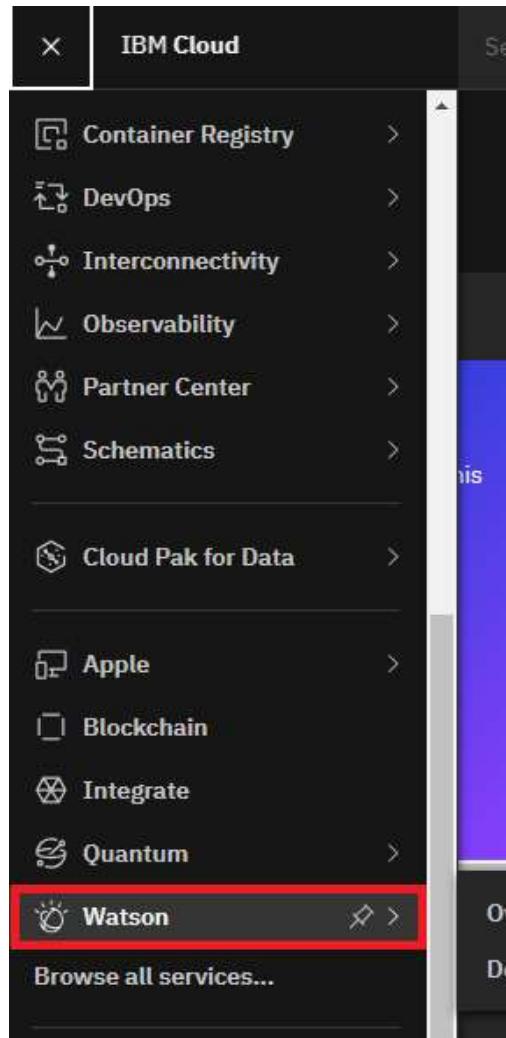
1. Enter your **password** and click **Log in**.



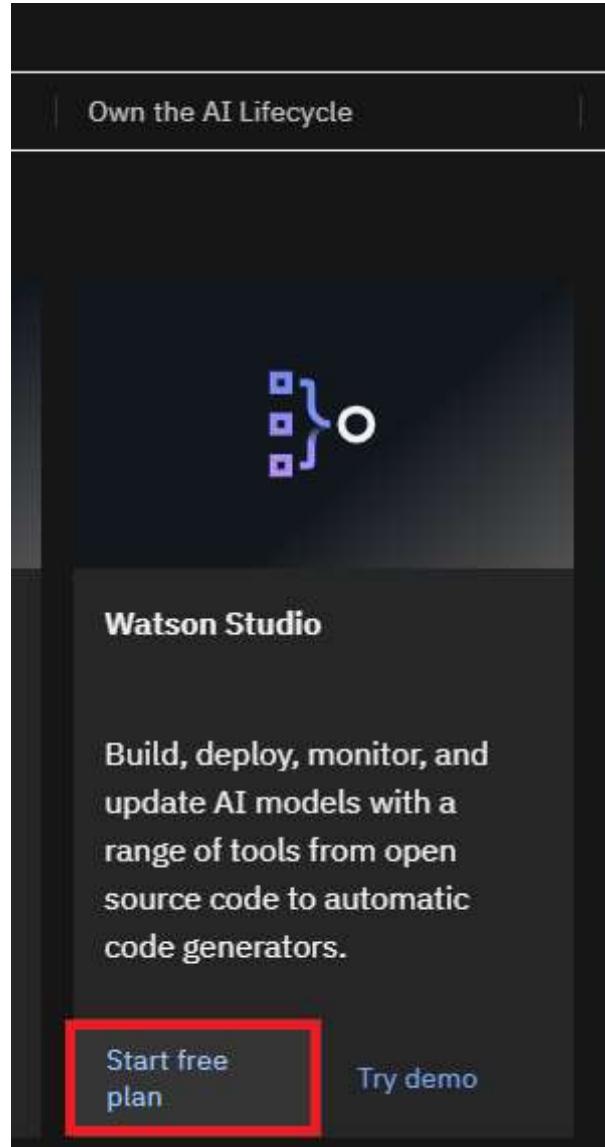
1. Click **Navigation Menu Icon** on the top left side.



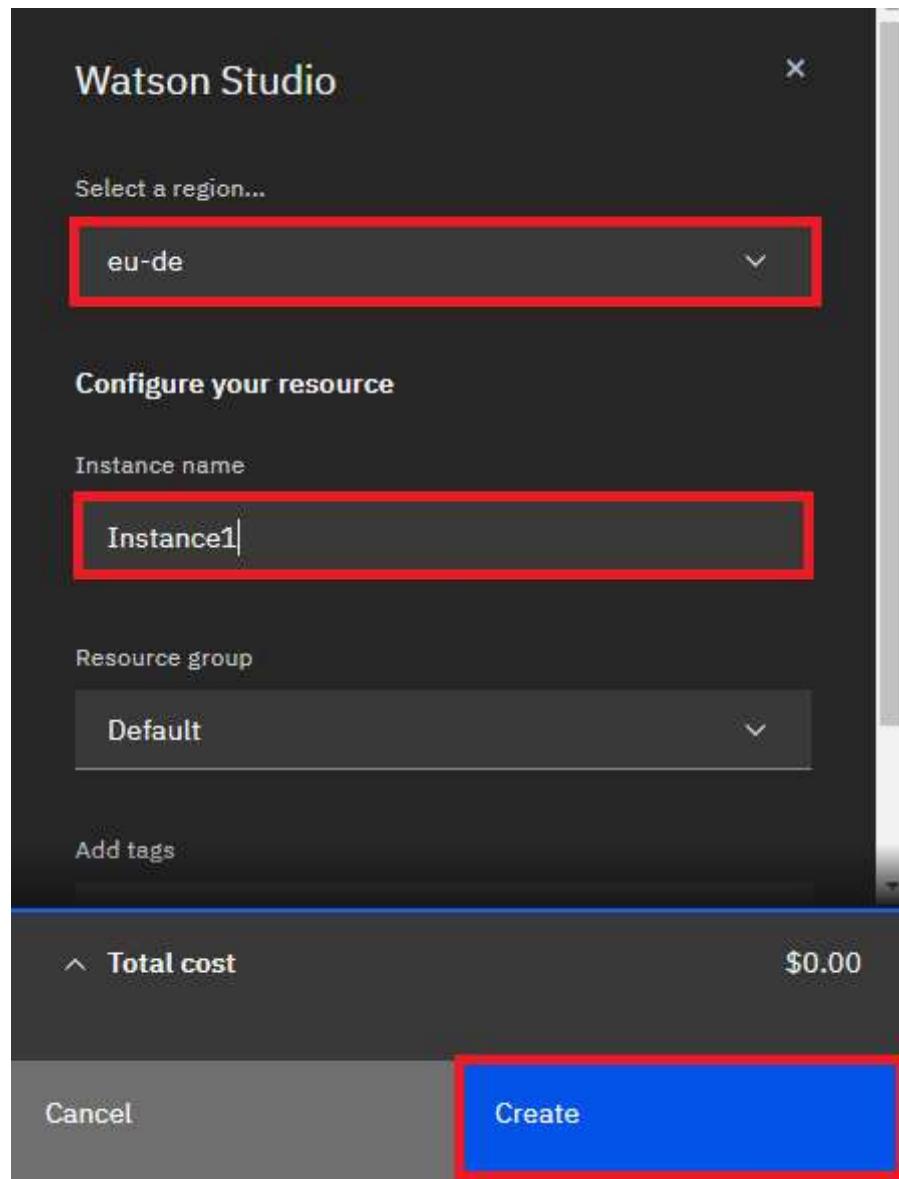
1. From the navigation Menu sidebar, click Watson.



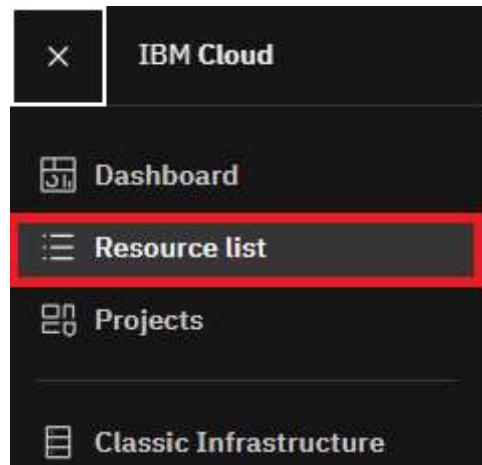
1. Now from the section **All Services**, click **Watson Studio Start free plan**. You will see a dialog box to enter the region and the name of your Watson Studio instance.



1. 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.



1. You will be redirected to IBM Cloud Pak (dataplatform.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.



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

<

Resource list

Name	Group	Location	Product	Status	Tags
Instance1	Default	Frankfurt	Watson Studio	Active	
KnowledgeCatalog	Default	Dallas	Watson Knowledge Catalog	Active	
WatsonOpenScale	Default	Dallas	Watson OpenScale	Active	

Create resource +

- Converged infrastructure (0)
- Enterprise applications (0)
- AI / Machine Learning (3)
 - Instance1
 - KnowledgeCatalog
 - WatsonOpenScale
- Analytics (0)
- Blockchain (0)
- Databases (1+)
- Developer tools (0+)
- Logging and monitoring (0)

1. Click on Launch in IBM Cloud Pak for Data.

IBM Cloud

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

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

IBM Cloud Pak for Data

Preparing Cloud Pak for Data

Done! Your IBM Cloud Pak for Data services are ready to use.

1. 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 interactive map to find the tools that you need for 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

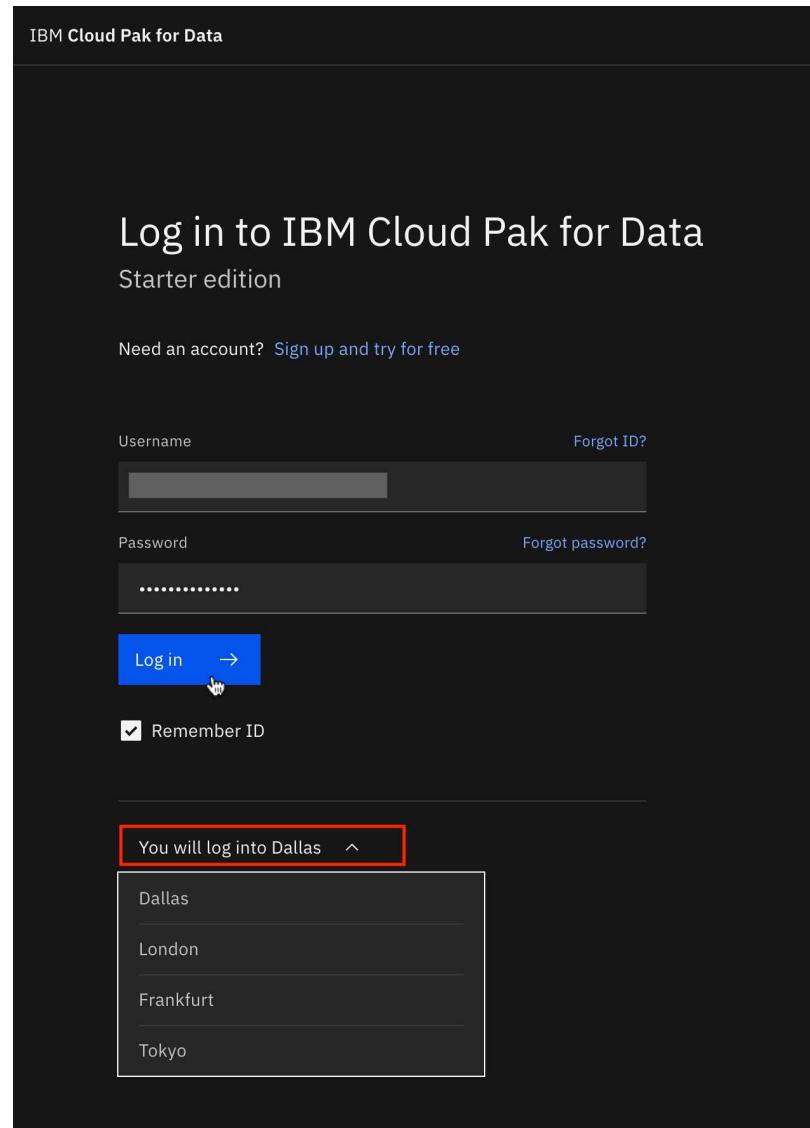
Notifications

Online deployment ready
The online deployment test in sp think is ready to accept requests
Oct 27, 2022 4:38 PM

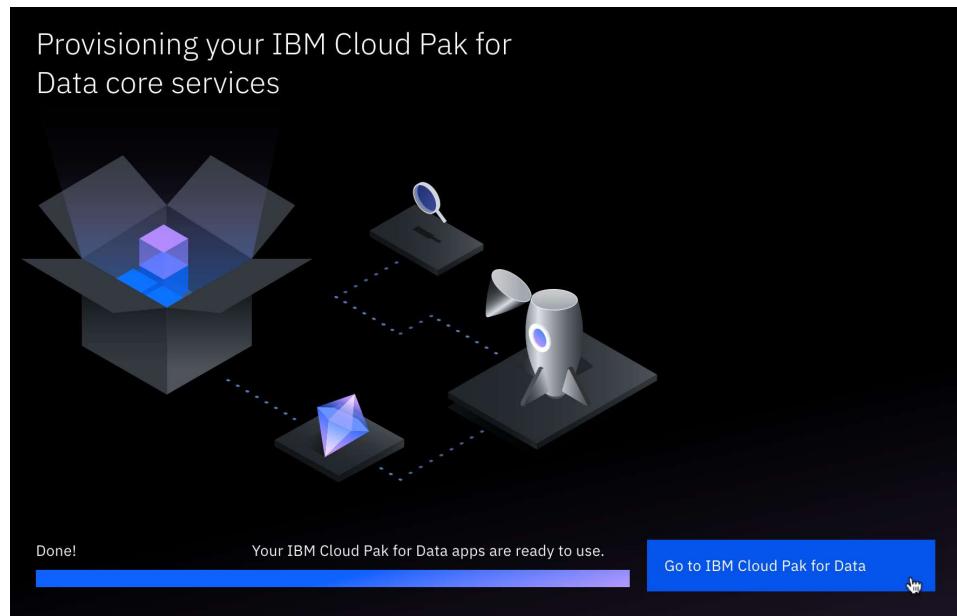
Task B : Login to IBM Cloud Pak for Data

- 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).



1. Click Go to IBM Cloud Pak for Data.



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

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Projects	+	Notifications
Beta testing Week3 lab 2	Nov 21, 2022 5:28 PM	Online deployment ready The online deployment test in sp think is ready to accept requests Oct 27, 2022 4:38 PM
Python Project	Nov 14, 2022 11:21 AM	

Task C : Create a New Project

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

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→

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Create new project

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

1. Click **Create an empty project**.

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.

Create an empty project

Add the data you want to prepare, analyze, or model. Choose tools based on how you want to work: write code, create a flow on a graphical canvas, or automatically build models.

AutoAI experiment tool: Fully automated approach to building a classification or regression model.

USE TO

- Prepare and visualize data
- Analyze data in notebooks
- Train models

1. 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

Description

Project description

Define storage

① Select storage service
 Add an object storage instance, and then return to this page and click Refresh.

② Refresh

1. 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	<p>1 COS Service Instance Storage up to 25 GB/month Up to 2,000 Class A (PUT, COPY, POST, and LIST) requests per month Up to 20,000 Class B (GET, PUT all others) requests per month Up to 1.0 GB/month of Data Retrieval Up to 1GB of egress (Public Outbound) Applies to aggregate total across all storage bucket classes</p> <p>The Lite service plan for Cloud Object Storage includes Regional and Cross Regional resiliency, flexible data classes, and built in security.</p> <p>Lite plan services are deleted after 30 days of inactivity.</p>	Free <input checked="" type="checkbox"/>
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

Create View terms

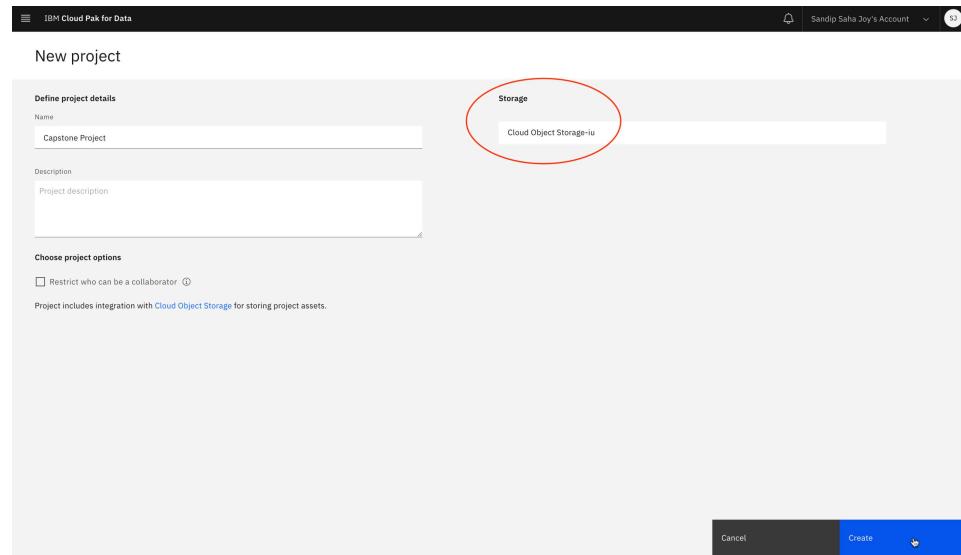
1. Now you will be redirected to the previous new project page. Click **Refresh**.

IBM Cloud Pak for Data

New project

Define project details	Define storage
Name	① Select storage service
Capstone Project	Add
Description	Add an object storage instance, and then return to this page and click Refresh
Project description	② Refresh

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



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

The screenshot shows the 'Assets' tab of the Capstone Project. It features a search bar, an 'Add asset' button, and a 'New asset' button. The 'All assets' section is selected. A callout text says: '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

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Open this interactive catalog to search for the tools that you need to complete tasks.

Quick start

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Projects

Project	Last Activity
Capstone	Today at 7:21 PM
Beta testing Week3 lab 2	Nov 21, 2022 5:28 PM

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

Manage

Services & integrations

Associate service

1. Click **New service**.

Associate service

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

New service

1. Click **IBM Cognos Dashboard Embedded**.

The screenshot shows the Skills Network Editor interface with a search bar at the top containing "Find services". Below the search bar, there is a "Category" section with a checkbox for "Analytics". The main content area displays a list of services under the heading "Analytics". One service, "IBM Cognos Dashboard Embedded", is highlighted with a red border. This card includes a small icon, the service name, a brief description ("Bring data to life directly from your application with this powerful and easy-to-use visualization service."), and a "Lite • Free" status indicator.

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

This screenshot shows the creation process for the IBM Cognos Dashboard Embedded service. It starts with a "Services catalog /" header. Below it, the "IBM Cognos Dashboard Embedded" service card is shown with its details: Author: IBM, Date of last update: Aug 17, 2020, Docs link. The "Create" button is highlighted with a red box. To the right, a "Summary" panel shows the service is in Region: Dallas, Plan: Lite, Service name: IBM Cognos Dashboard Embedded, and Resource group: Default. The "Create" button in this panel is also highlighted with a red box.

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
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

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

This screenshot shows the "Associate service" page. It has a header "Associate service" and a sub-instruction "Choose an existing or add a new service to associate with your project.". Below is a table with one item selected. The "Associate service" button in the top right of the table is highlighted with a red box.

Name	Type	Plan	Location	Status	Group
<input checked="" type="checkbox"/> IBM Cognos Dashboard Embedded-pe	IBM Cognos Dashboard Embedded	Lite	Dallas	Not associated	Default

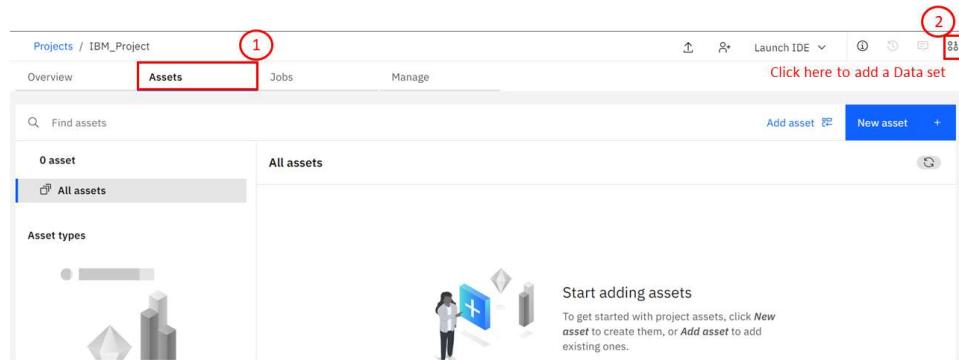
1. Once the service association status appears green, **close** the associate service page.

This screenshot shows the "Associate service" page after the service has been successfully associated. The status column for the selected service now shows a green circle with a checkmark and the word "Associated". The "Associate service" button is no longer visible, as the task is complete.

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

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.



1. Browse to the file download location, select the downloaded CSV file, and click Open.
2. 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 car_sales_data_sample.csv	Data Asset

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.

- On the Overview page of Capstone Project project, click **New asset**.

The screenshot shows the 'Overview' tab selected in the navigation bar. Below it, the project name 'Capstone Project' is displayed along with its last update date, Oct 08, 2020. On the right side, there are counts for 'Assets' (1) and 'Collaborators' (1). The top right corner features the 'Add to project' button, which is highlighted with a red box.

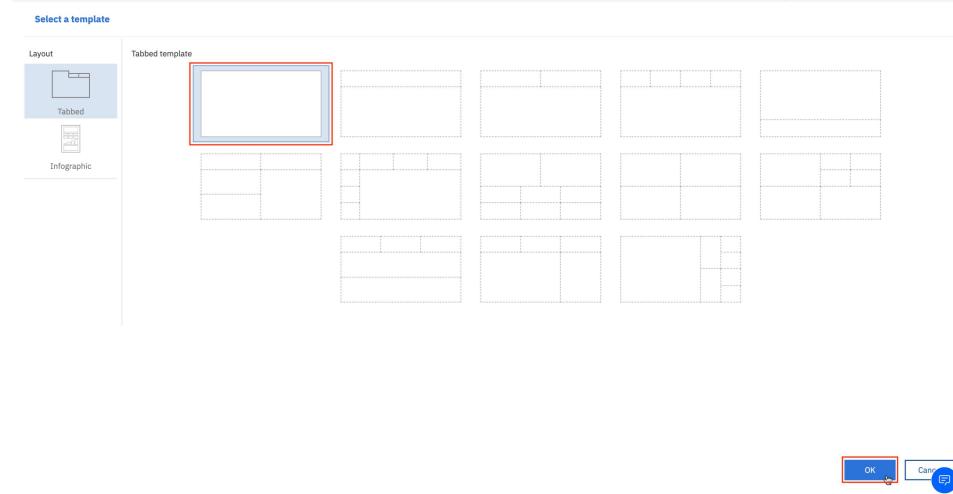
- Scroll down and select **Dashboard Editor**.

This screenshot shows the 'New asset' creation interface. The 'Tool type' dropdown is set to 'All types'. A red box highlights the 'Dashboard editor' option, which is described as 'Create a set of visualizations of analytical results on a graphical canvas without coding.' Other options like 'Data Refinery', 'Decision Optimization', and 'Pipelines' are also listed.

- 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 interface. The 'Name' field is populated with 'Simple Dashboard'. The 'IBM Cognos Dashboard Embedded service' dropdown is open, showing two options: 'Select Cognos Dashboard Embedded service from the list' and 'IBM Cognos Dashboard Embedded-pe'. The 'IBM Cognos Dashboard Embedded-pe' option is highlighted with a red box. At the bottom right, there are 'Cancel' and 'Create' buttons, with 'Create' being highlighted in blue.

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



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

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

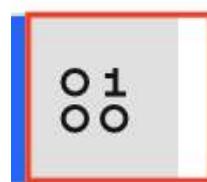
1. Select **Data assets**. Select **car_sales_data_sample.csv** and click **Select**.

Select connection source

Capstone Project	Data assets
Assets (2)	Data assets (1)
Connections >	car_sales_data_sample.csv
Data assets >	

Cancel Select 

1. 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**.



1. From the **Data Source** panel, select **SALES**. Drag it to the **Panel** and release.

The screenshot shows the Skills Network Editor interface. On the left, there's a sidebar with a tree view of data fields from a CSV file named 'car_sales_data_sample.csv'. A field named 'SALES' is highlighted with a red box and has a red arrow pointing to a blue button labeled 'SALES' on a tab labeled 'Tab 1'. The tab also has a 'Filter' icon and a placeholder text 'Drag and drop data here to filter all tabs.'

1. Now you have successfully started to populate your dashboard with data visualizations too!

10M
SALES

1. To save the newly created dashboard, click **Save** icon.



Congratulations! You have completed the Lab.

Author(s)

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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