

## Dashboards

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## What is a dashboard?

A Cloudera Data Visualization dashboard is a collection of multiple visuals with the option to apply filters to them. You can use dashboards to consolidate related visualizations. For example, you can display and link visuals that are based on different datasets across different connections while offering run-time filtering on all referenced information.

Once you have created a dashboard, you can add visuals and filter controls, fine-tune settings and styles, and incorporate custom design elements to tailor the dashboard to your specific requirements. You can use sheets to organize the visuals on your dashboards.

### Sheets

A sheet functions as the ‘canvas’ or a single page within a dashboard where you can design and display visualizations. Dashboards can contain one or more sheets, with each serving as a container for organizing and presenting specific sets of visual elements. Sheets allow users to organize information in a structured and meaningful way, providing a clear layout for data exploration and analysis.

Sheets give you the flexibility to consolidate all pertinent information about a dataset, a line of inquiry, or a business on a single screen while also providing quick access to related or supplemental visualizations on other sheets. The arrangement of sheets is entirely customizable to meet your unique needs and preferences.

By default, sheets are named Sheet 1, Sheet 2, and so on, but you can assign more descriptive names to your sheets to enhance clarity.

Each sheet is also assigned a unique identifier, visible in the sheet’s URL. This ID serves as a reference point, helping users to easily distinguish between different sheets within one dashboard.

### Related Information

[Creating a dashboard](#)

[Dashboard Designer](#)

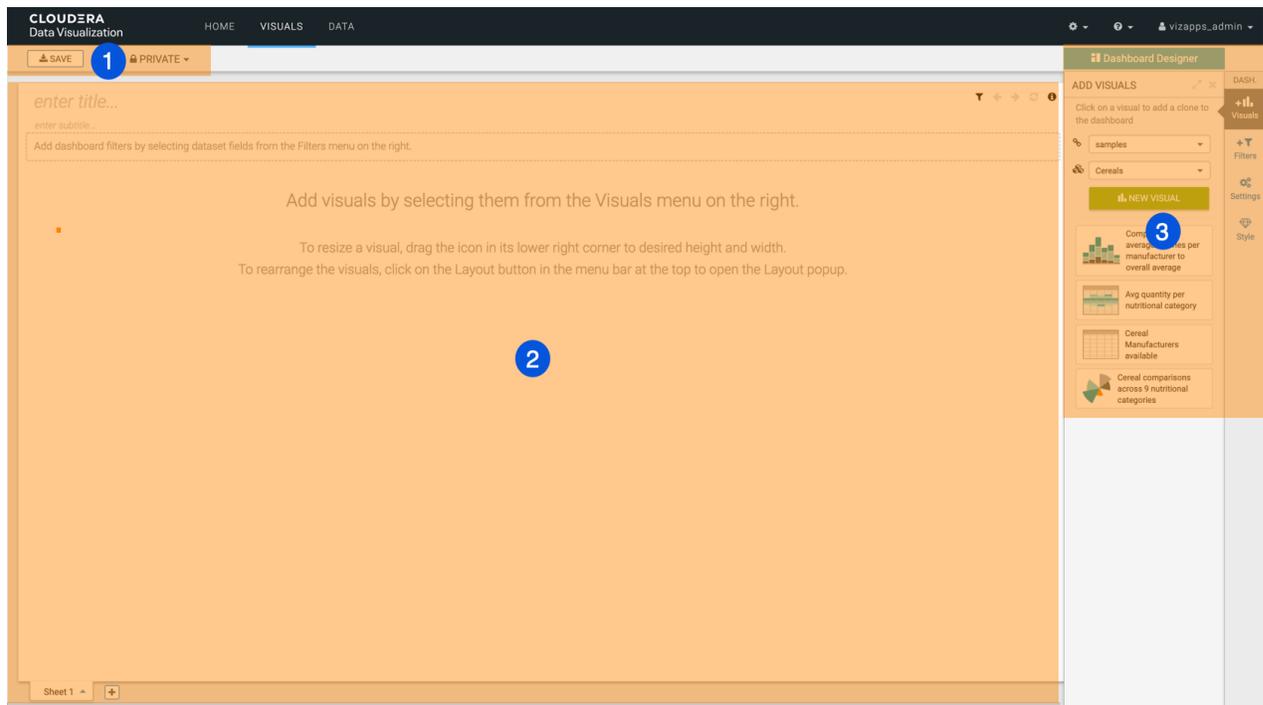
[Creating a new sheet](#)

## Dashboard Designer

The Dashboard Designer of Cloudera Data Visualization provides an intuitive interface for building dashboards that help you to collect, organize, and display related visuals. You can add or link the visuals you have created based on datasets from the same connection or across different connections.

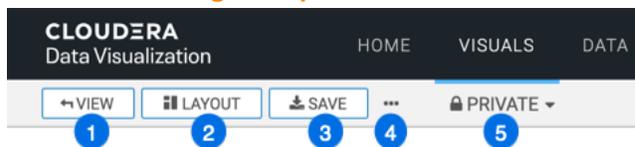
Using the Dashboard Designer interface, you can create visuals and arrange them on dashboards with ease.

The Dashboard Designer page has the following main parts:



1. Dashboard Designer top menu bar
2. Dashboard preview area
3. Dashboard Designer side menu bar

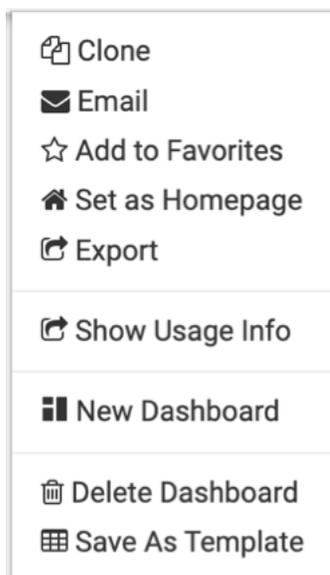
### Dashboard Designer top menu bar



This menu bar houses various functions and options for designing and customizing your dashboards.

1. The VIEW button allows you to preview the dashboard at runtime. It becomes accessible on the menu bar after saving your dashboard. When you open an existing dashboard, it is initially displayed in View mode. To make edits or add new visuals, simply switch to Edit mode by clicking the EDIT button. You can switch back to View mode by clicking the VIEW button.
2. The LAYOUT button allows you to modify the layout of the dashboard. It appears on the menu bar once your dashboard has been saved. For more information on adjusting the arrangement of visuals on a dashboard, see *Customizing dashboard layout*.
3. The SAVE button allows you to save all changes made to the dashboard.

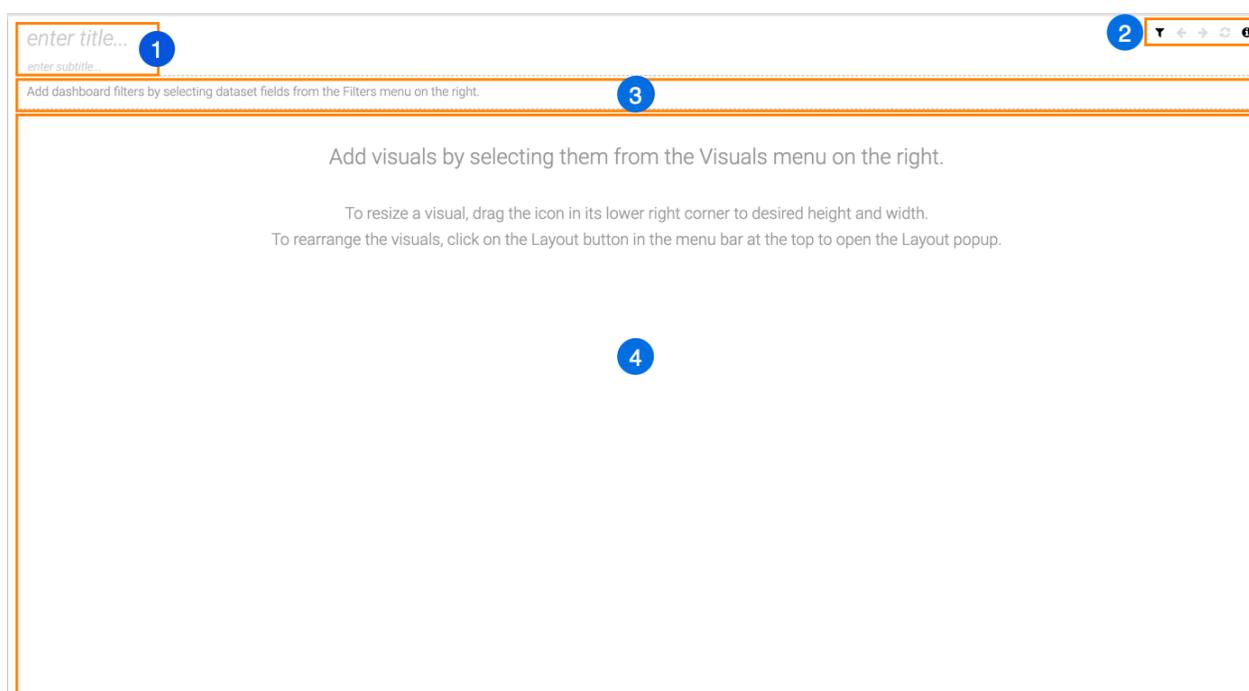
4. The Supplemental menu offers access to additional functions:



- Clone lets you clone the current dashboard.
  - Email allows you to create an email job for the current sheet.
  - Add to Favorites lets you mark frequently-used dashboards as favorites for quick access. This option becomes available after you have initially saved your dashboard.
  - Set as Homepage lets you change your home screen to the current dashboard. This option is accessible once you have saved your dashboard.
  - Export allows you to export all dashboard elements. This feature is enabled after saving your dashboard.
  - Show Usage Info provides access to profile data, providing insights into usage. For more information, see *Showing usage information*.
  - New Dashboard lets you create a new dashboard.
  - Delete Dashboard lets you remove the current dashboard.
  - Save As Template allows you to use the current dashboard as a new template. Templates facilitate the rapid creation of dashboards from a dataset.
5. The workspace selector allows you to assign your dashboard to a different workspace. Dashboards can belong to public, private, or a custom workspace, but they can only exist in one workspace at any time.

### Dashboard preview area

The dashboard preview area shows the contents of the dashboard, that is all filters and visuals you have added to it. You can also find here the title and subtitle of the dashboard. When you start building a new dashboard, this area is empty.



1. The title area contains two editable fields where you can add the title and subtitle of your choice. Both are empty when you create a new dashboard.

- enter title...
- enter subtitle...

2. Dashboard actions

- Parameters
- Back
- Forward
- Reset
- Information

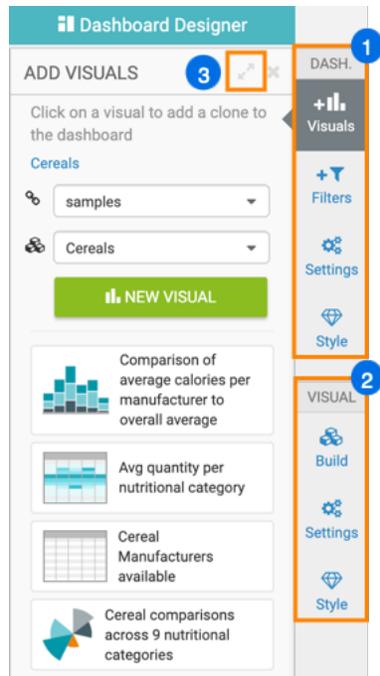
When you save a new dashboard the supplemental menu icon is added to the dashboard actions offering the following options:

- Email – You can use it to send the dashboard in an email. For more information, see *Emailing a dashboard*
- Download as... – You can use it to download the dashboard as an image or in PDF format. For more information, see *Downloading a dashboard*
- Get URL – You can use it to obtain the default URL of the dashboard or generate a short URL for it. For more information, see *Getting the dashboard URL*.

3. The filter area contains the filter controls that allow you to dynamically change the dashboard presentation at run time. Filters can be defined on any column of the dataset by pulling the appropriate field from the Filters menu.

4. The visuals area contains the visuals of the dashboard. It is empty when you create a new dashboard. To add visuals, use the Visuals menu.

### Dashboard Designer side menu bar



1. The dashboard menu selector enables you to choose between different menus in the Dashboard Designer.

- Visuals – This menu allows you to add visuals to your dashboard.
  - Recently Created Visuals show you the new visuals added recently.
  - The Connection drop-down list lets you select an alternate connection. It is available in both the Visuals and Filters menus.
    -  **Note:** A dashboard can contain visuals from several connections.
  - The Dataset drop-down list lets you select an alternate dataset. It is available in both Visuals and Filters menus.
    -  **Note:** A dashboard can contain visuals from multiple datasets that share the same connection or from different datasets across different connections. When you change the dataset, a new set of existing visuals appears in the menu.
  - The NEW VISUAL button enables you to start a new visual from within the dashboard.
  - Existing visuals that belong to the specified dataset are displayed lower on the menu. Changing the dataset gives access to other visuals. You can click the visuals to add them to the dashboard.
- Filters – This menu allows you to add filters to your dashboard.
  - The CREATE CUSTOM FILTER button allows you to create a custom filter based on any parameter and add it to your dashboard.
  - The Connection drop-down list lets you select an alternate connection. It is available in both Visuals and Filters menus.
    -  **Note:** A dashboard can contain visuals from several connections.
  - The Dataset drop-down list lets you select an alternate dataset. It is available in both Visuals and Filters menus.
    -  **Note:** A dashboard can contain visuals from multiple datasets that share the same connection or from different datasets across different connections. When you change the dataset, a new set of existing visuals appears in the menu.
  - Dimensions show you all fields by dataset that you can use as a filter.
  - Measures show you all fields by dataset that you can use as a filter.
    -  **Note:** You can also use the Search text box to look for a field.
- Settings – This menu provides you with several options for dashboard display settings.
  - General
  - Filter Settings
  - Downloads

See *Customizing general settings for dashboards* for more information.
- Style – This menu provides you with various styling options for dashboards.
  - Dashboard Basics
  - Dashboard Title
  - Dashboard Subtitle
  - Filters
  - Visual Borders
  - Custom Style

See *Customizing style for dashboards* for more information.



**Note:** You can minimize the side menu bar to see the full dashboard preview area by clicking the selected menu icon again.

2. If you already have a visual or visuals available in the dashboard and you are working on one of them, you can also see the visual menu selector in the side menu bar. It enables you to choose between different menus in the Visual Builder.

- Build
- Settings
- Style

For more information about these visual menu options, see *Visual Builder*.

3. At the top right corner of the Dashboard Designer side menu, you can click the [expand] icon to increase its width. To decrease the size of the pane, you can click the [compress] icon.

### Related Information

[Showing usage information](#)

[Emailing a dashboard](#)

[Downloading a dashboard](#)

[Getting the dashboard URL](#)

[Customizing general settings for dashboards](#)

[Customizing style for dashboards](#)

[Visual Builder](#)