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Dashboards

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Creating a dashboard

In CDP Data Visualization, you can easily create a new dashboard.

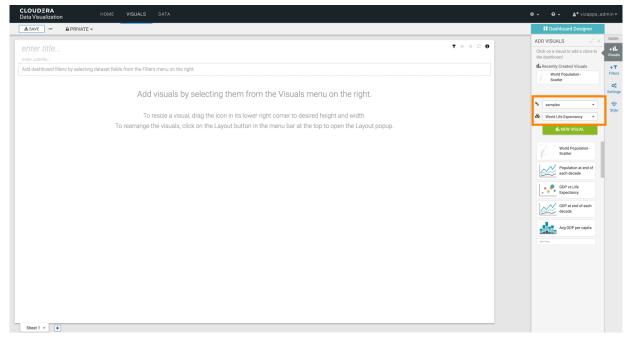
Procedure

- 1. There are several possible starting points for creating new dashboards:
 - Click NEW DASHBOARD on the main HOME interface, in the top right corner.
 - Click NEW DASHBOARD on the main VISUALS interface, in the top left corner.
 - On the DATA interface, click the (new dashboard) icon next to the name of a particular dataset.
 - On the Dataset Detail view for a particular dataset, click NEW DASHBOARD in the top right corner.

The Dashboard Designer opens an untitled dashboard. See the *Dashboard Designer* documentation to familiarize yourself with the interface.

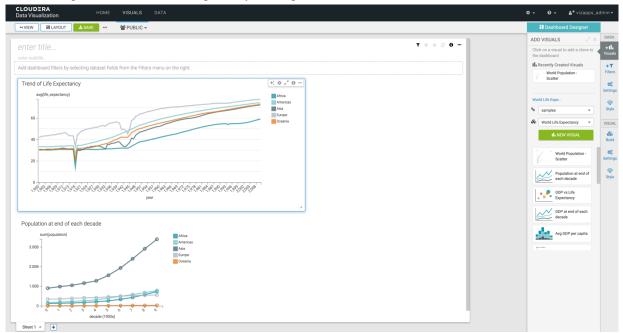
2. Change the connection and/or dataset.

Even though the dashboard is automatically connected to the parent connection and dataset, you can add visuals and filters based on other connections and datasets.



3. In the VISUALS menu, select the existing visual(s) you want to add to the dashboard, either from Recently Viewed Visuals, or from the listed visuals of this dataset. Alternatively, you can create a new visual by clicking NEW VISUAL.

In this example, the Trend of Life Expectancy and Population at end of each decade visuals are used.



4. Click the Filters menu, and click the relevant fields to add filters to your dashboard.

Alternatively, you can click CREATE CUSTOM FILTER for custom selections. You can also change the dataset and the connection in this menu.

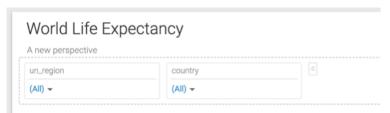
In this example, filters are added ased on the un_region and country dimensions.



5. Add a title for the dashboard.

Optionally, you can also add a subtitle.

In this example, World Life Expectancy and A new perspective are used as title and subtitle.



- 6. You can also customize settings, styles, and create custom styles for the dashboard.
- 7. Click SAVE to save the dashboard.
- **8.** Click VIEW to preview the dashboard at runtime.

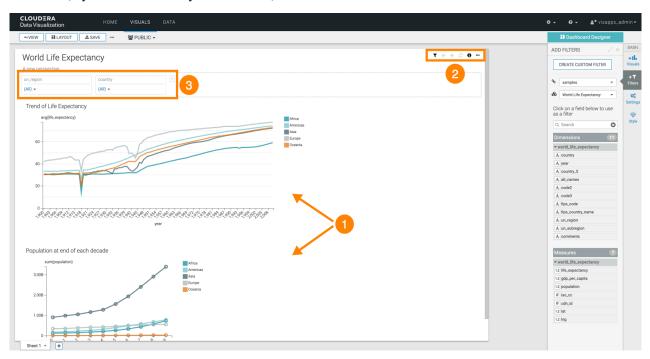
Viewing a dashboard

In View mode, CDP Data Visualization dashboards are dynamic and responsive. This is achieved primarily through the active interaction among filters and visuals, and as a result of having dashboard controls.

View mode

If you open a dashboard in View mode, you can access the following in the dashboard preview area:

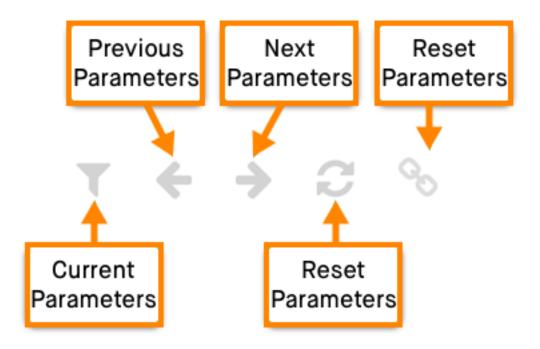
- 1. Visuals
- 2. Dashboard controls (for more information see the next section)
- 3. Filters (if you added filters to your dashboard)



Dashboard controls

CDP Data Visualization offers a set of Dashboard Controls in View mode. For some of these widgets, keyboard shortcuts are also available.

- Current Parameters shows the current values of dashboard-level filters.
- Previous Parameters ((left arrow) icon) navigates between a series of filter settings by going back in history one step. It moves the dashboard to the previous state, by resetting the filter values. The keyboard shortcut is Ctrl + B.
- Next Parameters ((right arrow) icon) navigates between a series of filter settings by going forward in history one step. It advances the dashboard to the next state (if one exists), by forwarding to a previously selected set of filter values. The keyboard shortcut is Ctrl + F.
- Reset Parameters ((refresh) icon) resets the dashboard to the the initial state with the original filter values. To change these initial values, you must edit the dashboard and save the changes. The keyboard shortcut is *Ctrl* + *F*.
- Link to Page is an option that shows the full URL address of the dashboard so you can copy, save, and share it.

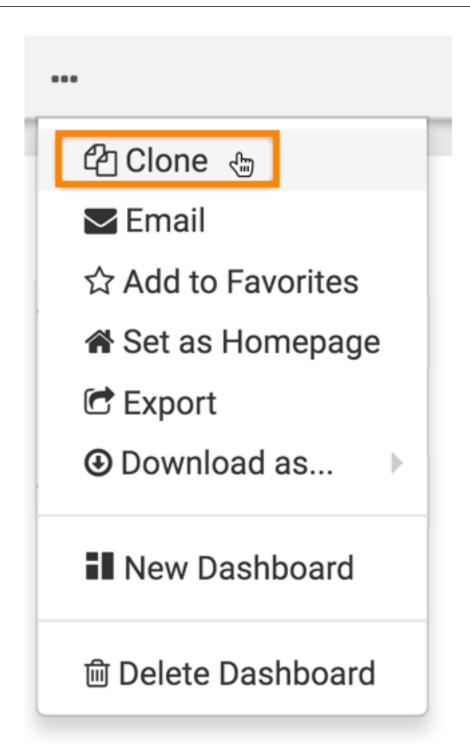


Cloning a dashboard

In CDP Data Visualization, you can create an identical dashboard that you may choose to customize or move to another workspace.

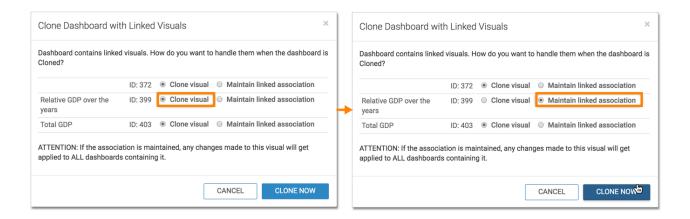
Procedure

In the Dashboard Designer top menu bar, click the (ellipsis) icon and select Clone.



If the dashboard contains linked visuals, the Clone Dashboard with Linked Visuals modal window appears.

By default, CDP Data Visualization clones all visuals, both linked and dashboard-specific. However, you can choose the Maintain linked association option for any of the linked visuals, and click CLONE NOW.



Adding a dashboard to favorites

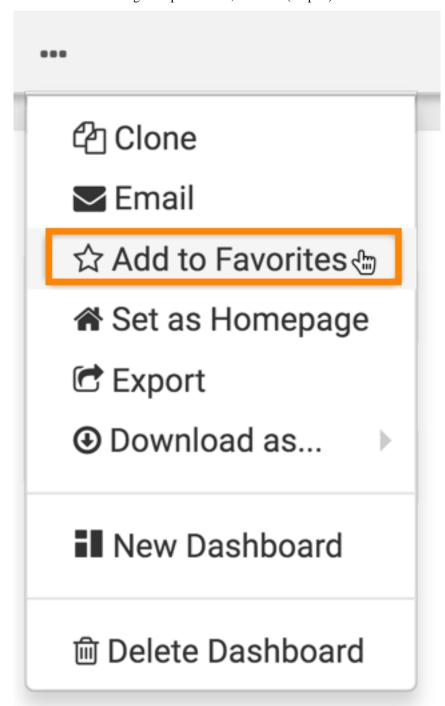
In CDP Data Visualization, you can identify commonly-used dashboards and mark them as favorites. With the help of these bookmarks, you can quickly find them in a subsequent work session.

About this task

This is a toggle setting. Follow the same steps to remove a visual from favorites.

Procedure

1. In the Dashboard Designer top menu bar, click the (ellipsis) icon and select Add to Favorites.



A Success message appears.

You can now find this visual in the Favorites list. All dashboards marked as favorite appear in the interface.

CLOUDERA Q find titles, viz types, datasets, authors VISUALS 8 Data Visualization +II NEW DASHBOARD +Ⅲ NEW APP All My Favorites 18 1 **!!!** | **■** WORKSPACES 0 World Life Expectancy

2. Click VISUALS on the main navigation bar and click My Favorites in the side menu bar.

Setting a dashboard as your homepage

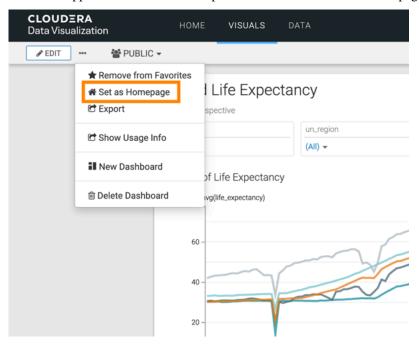
In CDP Data Visualization, you can change the home screen to the currently viewed or edited dashboard.

Before you begin

You need edit privileges to perform this task.

Procedure

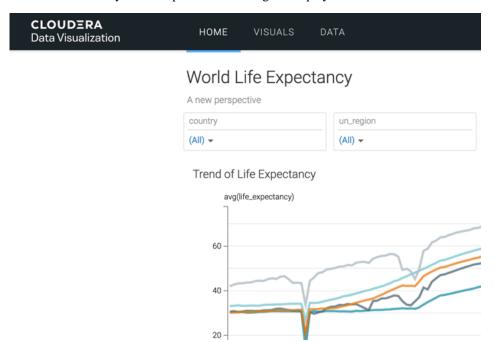
1. Click the supplemental menu in the top menu bar and select Set as Homepage.



A message confirming the success of setting the dashboard appears briefly.

2. Click HOME on the main navigation bar.

The dashboard that you have specified as homage is displayed.



Emailing a dashboard

CDP Data Visualization enables you to share dashboards through email.

Before you begin

Before using the email function, you must enable the feature in the CDP Data Visualization Site Settings. For instructions, see *Email settings*.

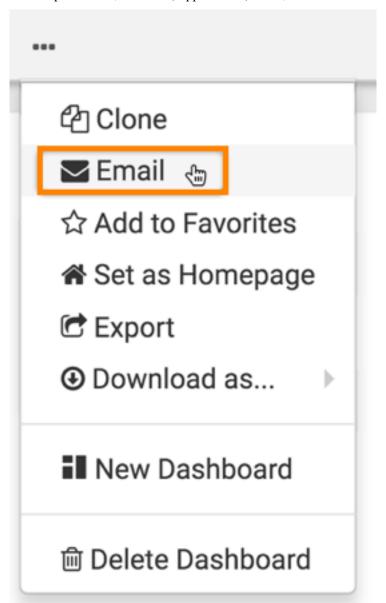


Note: This setting is only available for users with administrative privileges.

Procedure

1. Find the dashboard that you want to email. Open it either in Edit or View mode.

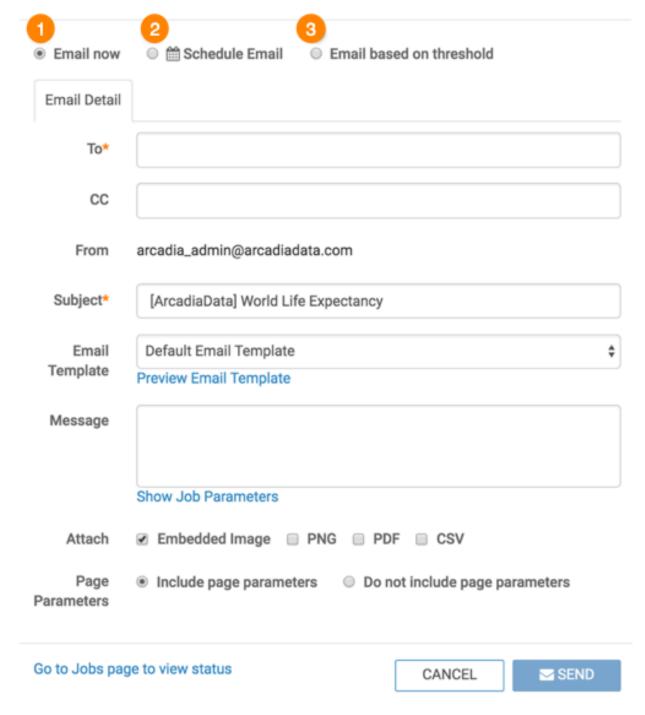
2. In the top menu bar, click the (supplemental) menu, and select Email.



The Email Current Sheet modal window appears. It has three primary options:

- a. Email now
- b. Schedule Email
- c. Email based on threshold

Email Current Sheet



3. Choose one of the options for sending an email.

Results

A sample email may appear something like this:





Note: You can only email one dashboard sheet at a time, but you can repeat this procedure for each sheet on the dashboard.

What to do next

After creating emails, you can monitor them in the Jobs interface, review their details, rerun or cancel them.

Downloading a dashboard

CDP Data Visualization enables you to save the current sheet of a dashboard in different file formats.

Downloading dashboard sheets as PNG files

CDP Data Visualization (CDV) enables you to save the current sheet of a dashboard as a PNG file. The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created.

About this task

This method is better than using a desktop tool because it handles images that are too long or wide to fit the screen.

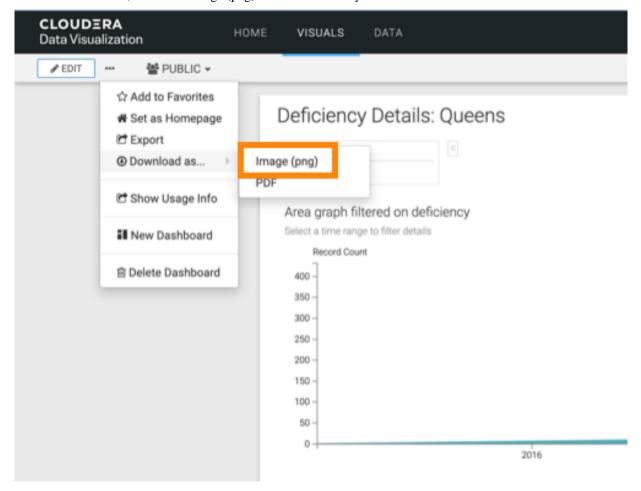


Note:

- This feature is available only when thumbnails are enabled.
- For snapshots of custom JS visuals, CDV supports only ECMA Script 5 for Javascript.
- CDV does not support PNG download on the Windows platform.

Procedure

- 1. In the Dashboard Designer top menu bar, click the (ellipsis) icon.
- 2. Click Download as..., and select Image (png) from the secondary menu.



A Generating the requested file message appears.

3. After the download is complete, open the default download folder on your computer.

Data Visualization saves the current sheet to a PNG file.

In our example, the generated filename, Example close_open issue_20190207094420, has the following components:

• Example close_open issue

Same name as the dashboard

• 20190207

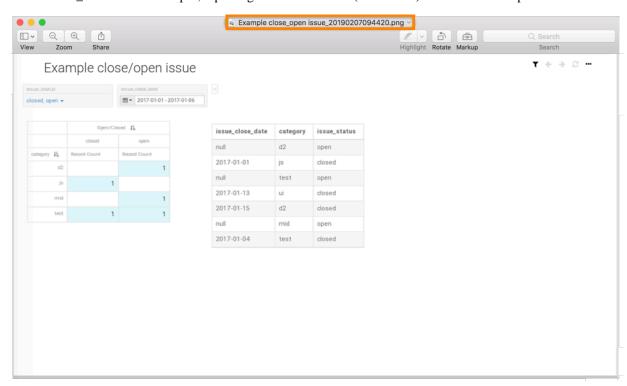
Signifies the date the file is created, in YYYYMMDD format

094420

Signifies the time the file is created, in hhmmss format



Note: Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet Example close/open issue, it generates the file as Example close_open i ssue_xxxxxxxxxxxxxxxxpdf, replacing the forward-slash (ASCII #47) character with a space.



Downloading dashboards and sheets as PDF files

CDP Data Visualization enables you to save your dashboards, and individuals sheets as PDF files.

About this task



Note:

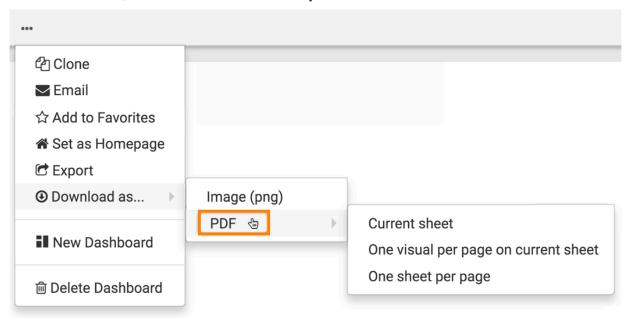
- This feature is available only when thumbnails are enabled.
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.

Before you begin

Before you download the dashboard as a PDF file, under Settings, navigate to the General menu, and select the Enable "Download as Image/PDF" option.

Procedure

- 1. In a dashboard, click the (ellipsis) icon at the top left corner of the interface.
- 2. Click Download as..., and select PDF from the secondary menu.



- **3.** From the dropdown menu, select one of the following options:
 - · Current sheet
 - One visual per page on current sheet
 - · One sheet per page

Downloading current sheet as a PDF file

CDP Data Visualization (CDV) enables you to download the current sheet of a dashboard as a PDF file with all visuals in the current sheet on one page.

About this task



Note:

- This feature is available only when thumbnails are enabled .
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.
- For filtered visuals, the filter must have app scope.

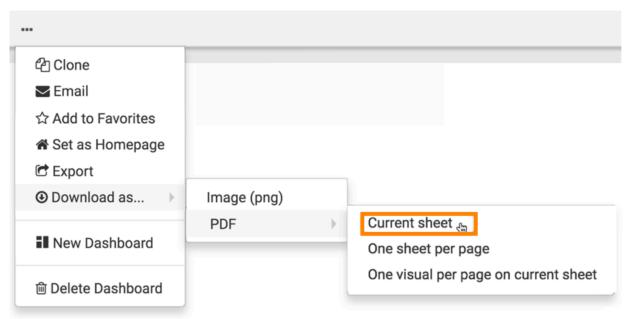
Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in Site Administration Site Settings Snapshots .

Procedure

- 1. Open any dashboard.
- 2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF Current Sheet .



A Generating the requested file message appears.

4. After the download is complete, open the default download folder on your computer. Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205135933, has the following components:

PDF Export

Same name as the dashboard

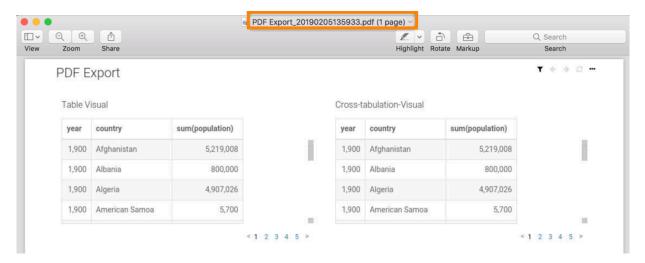
20190205

Signifies the date the file is created, in YYYYMMDD format

135933

Signifies the time the file is created, in hhmmss format





The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created.

5. All visuals in the current sheet (Sheet 1) are on one page. Repeat the preceding steps to download Sheet 2.

Downloading all sheets as a PDF File

CDP Data Visualization (CDV) enables you to download the entire dashboard as a PDF file with each sheet on a separate page.

About this task



Note:

- This feature is available only when thumbnails are enabled .
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.

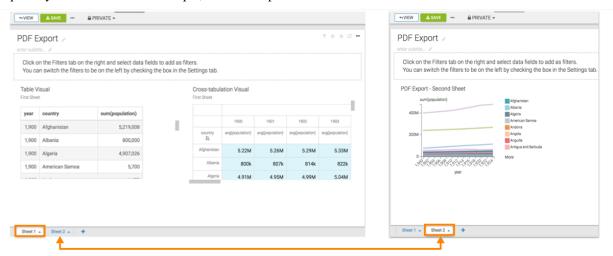
In the following example, you can see how to download Sheet 1 and Sheet 2 of the dashboard on separate pages.

Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in Site Administration Site Settings Snapshots.

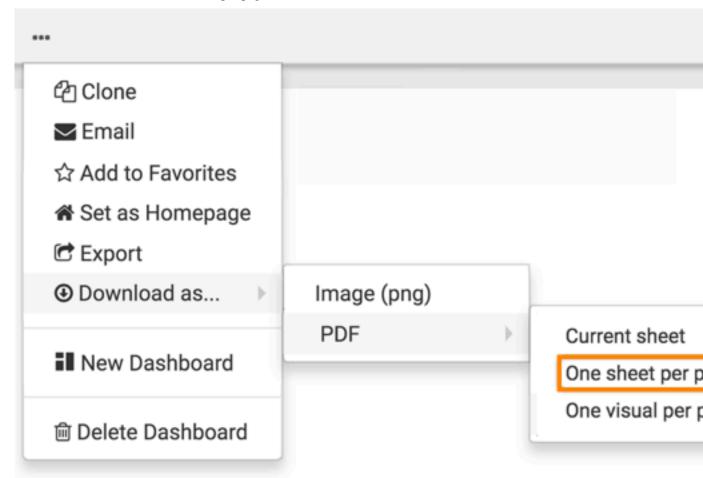
Procedure

1. Open any dashboard. In this example, the PDF Export dashboard that has two sheets is used.



2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF One sheet per page .



A Generating the requested file screenshot message appears.

4. After the download is complete, open the default download folder on your computer. CDP Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205142719, has the following components:

• PDF Export

Same name as the dashboard

20190205

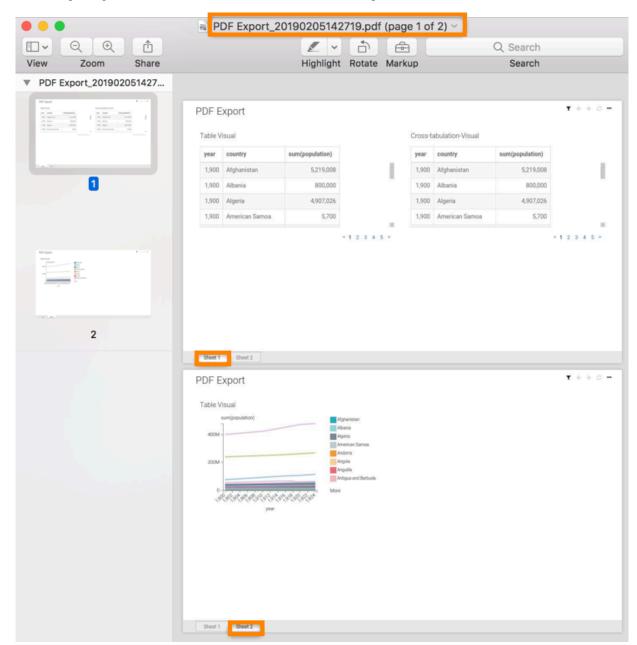
Signifies the date the file is created, in YYYYMMDD format

142719

Signifies the time the file is created, in hhmmss format



Note: Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet PDF/Export, it generates the file as PDF Export_xxxxxxxxxxxxxxxxxxpdf, replacing the forward-slash (ASCII #47) character with a space.



The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each sheet of the dashboard is on a separate page.

Downloading current sheet with one visual per page as a PDF file

CDP Data Visualization (CDV) enables you to download the current sheet as a PDF file with each visual on a separate page.

About this task

In the following example, you can see how to download a PDF file with each visual of the current sheet on a separate page.

Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in Site Administration Site Settings Snapshots .

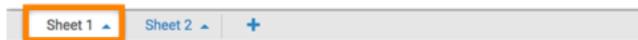
Procedure

1. Open any dashboard. In this example, the PDF Export dashboard is used, which has two visuals.



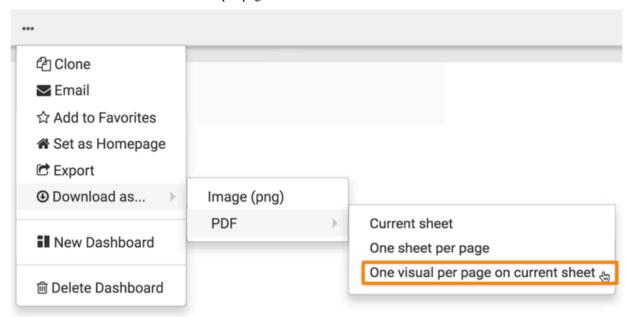
year	country	sum(population)
1,900	Afghanistan	5,219,008
1,900	Albania	800,000
1,900	Algeria	4,907,026
1,900	American Samoa	5,700





2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF One visual per page on current sheet.



A Generating the requested file screenshot message appears.

4. After the download is complete, open the default download folder on your computer. CDP Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205142003, has the following components:

PDF Export

Same name as the dashboard

20190205

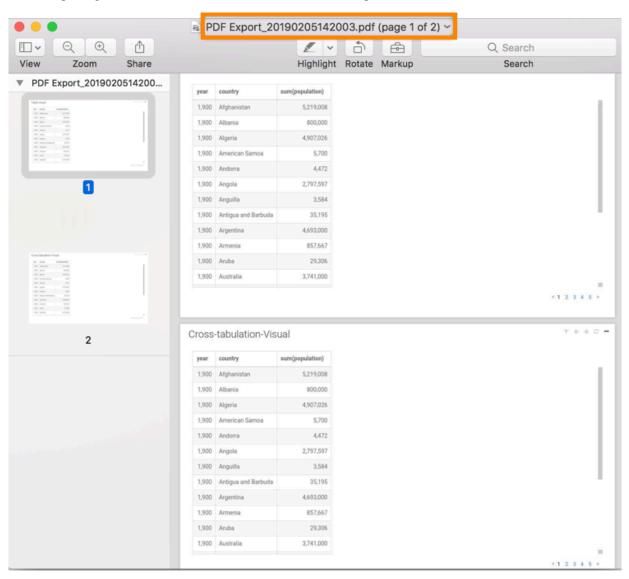
Signifies the date the file is created, in YYYYMMDD format

142003

Signifies the time the file is created, in hhmmss format



Note: Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet PDF/Export, it generates the file as PDF Export_xxxxxxxxxxxxxxxxx.pdf, replacing the forward-slash (ASCII #47) character with a space.



The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each visual in the current sheet is on a separate page.

Exporting a dashboard

In CDP Data Visualization (CDV), you can export visuals, dashboards and other visual artifacts. You can use the export function to port these artifacts from development/testing environments to production deployments or for creating back-ups.

About this task

Exporting a dashboard from a CDV instance generates a JSON file and saves it into your download directory. You can use this file can to import the visual artifacts to a new system, and deploy them if the new environment has identical data connections.

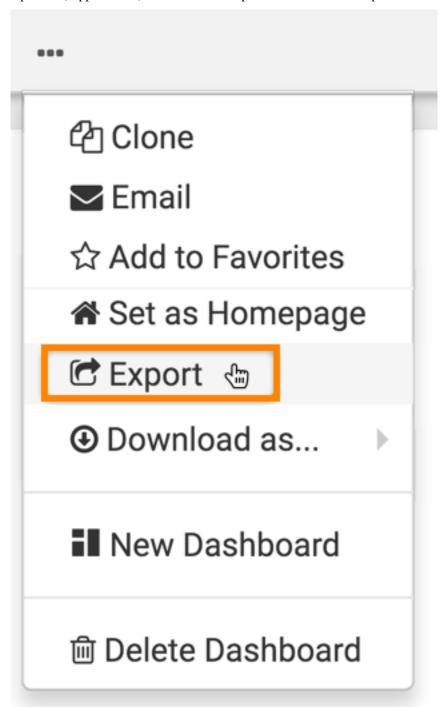


Note: You need the Manage visuals and dashboards privilege to export visual artifacts.

Procedure

1. Find the dashboard you want to export. Open it either in Edit or View mode.

2. Open the (supplemental) menu from the top menu bar and click Export.

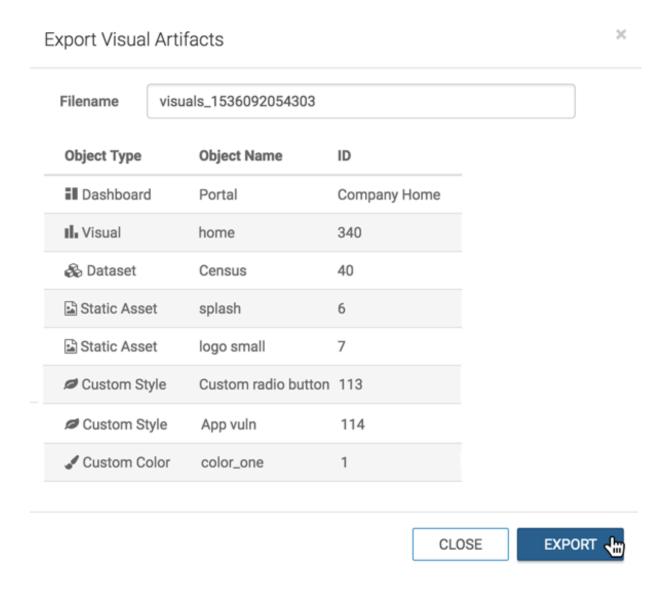


The Export Visual Artifacts modal window appears.



Note: In addition to the dashboard itself, the utility exports all dashboard elements: visuals, datasets, static assets, custom styles, and custom color.

3. Click EXPORT to confirm the export of the dashboard.



What to do next

For instructions on how to import a dashboard, see *Importing a dashboard*.

For more information about the visual artifact migration utility, see Exporting and importing visual artifacts.

Related Information

Importing a dashboard

Exporting and importing visual artifacts

Importing a dashboard

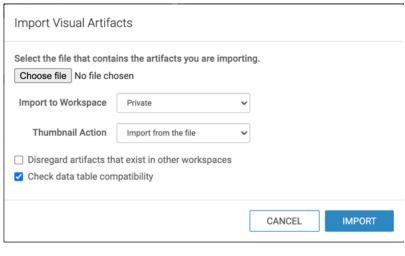
In CDP Data Visualization (CDV), you can import visuals, dashboards and other visual artifacts exported from another system. You can use the migration utility to port these artifacts from development/testing environments to production deployments or for creating back-ups. All you need is the appropriate JSON file that captures the definitions of these visual artifacts and all their dependencies (such as datasets and custom styles).

Procedure

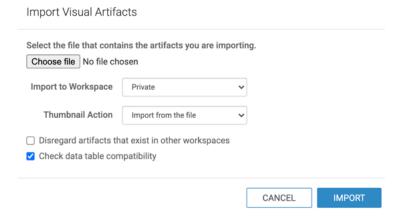
- 1. Click DATA on the main navigation bar.
- 2. Select the connection where you want to import the artifacts.

In this example, the Samples connection has been selected showing connecting to the same data source for both systems.

3. At the top of the screen, open the (supplemental) menu and select Import Visual Artifacts.



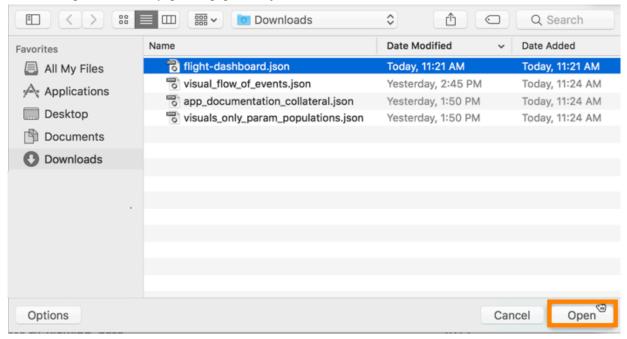
The Import Visual Artifacts modal window appears.



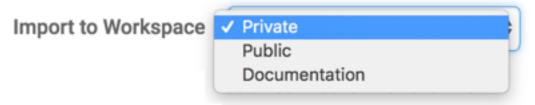
4. Click Choose File.

5. Select the file you want to import.

In this example, visuals_only_param_population.json is selected.



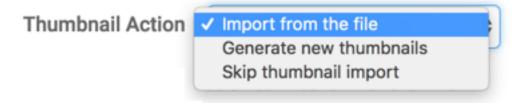
6. Specify the destination workspace in the Import to Workspace drop-down menu.



By default, Data Visualization imports the visual artifacts into your Private workspace. However, you can choose the Public workspace, or another workspace.

7. Specify how you want to handle thumbnails.

There are three options:



By default, Data Visualization imports the thumbnails from the file. However, you can choose to generate new thumbnails during the import process, or skip thumbnail import.

8. Define the Disregard artifacts that exist in other workspaces option.

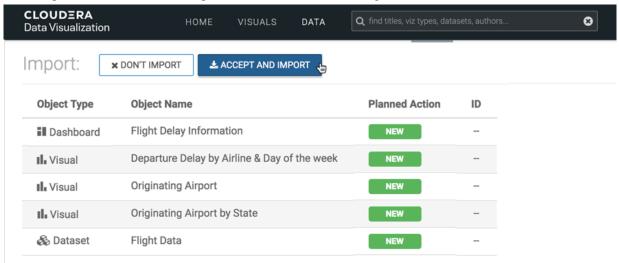
Before importing an artifact, Data Visualization searches for it on the system. If it already exists, it is either updated (if changed from a previous import), or left 'as is'. If it does not exist, it is imported as a new visual artifact. By default, the search domain is the entire system. By selecting this option, you are limiting the search to the specified workspace.

9. Check data table compatibility.

This is to confirm that tables suitable for the incoming dataset(s) exist on the system. It means that the database and tables have the same names on the source and target systems. This option is 'on' by default.

10. Click IMPORT.

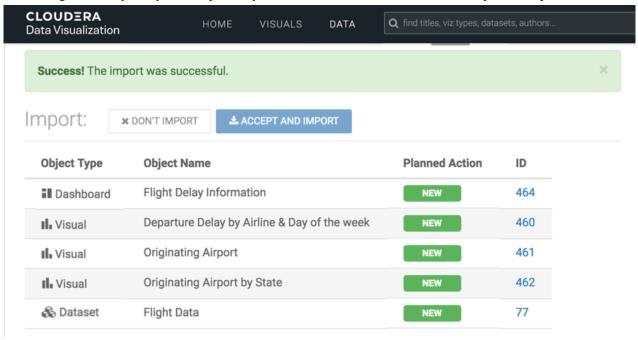
After processing the import JSON file, CDV opens the Import interface to show its visual artifacts. It displays the visual artifacts that you saved earlier into a JSON file during export. The Planned Action column shows that this is a new import for all artifacts. At this point, none of them have an assigned ID.



11. Click ACCEPT AND IMPORT.

Results

After the import completes, a success message appears on the Import interface. All the artifacts have an assigned ID, which are generated by the system, sequentially. Visuals/Dashboards and datasets have separate ID queues.



For instructions on how to export a dashboard, see Exporting a dashboard.

For more information about the visual artifact migration utility, see Exporting and importing visual artifacts.

Related Information

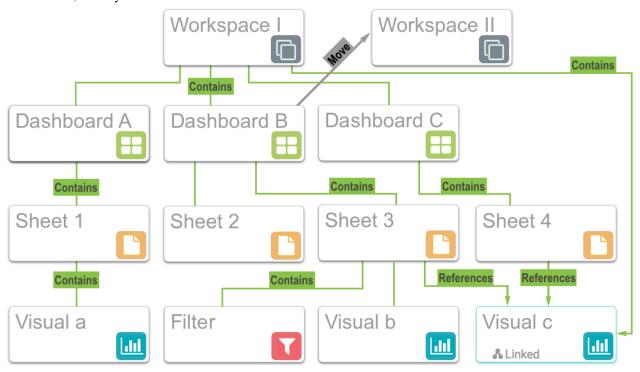
Exporting a dashboard

Exporting and importing visual artifacts

Moving a dashboard

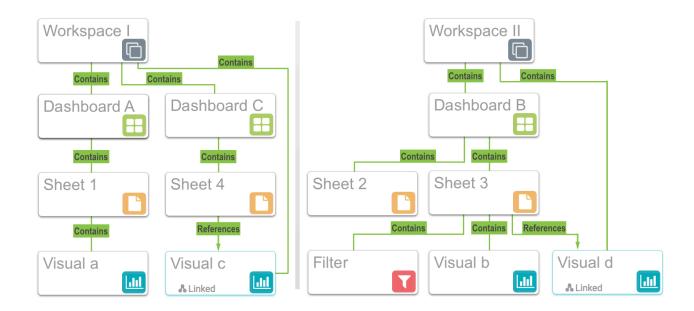
You may wish to move a dashboard from a development workspace (either private or custom) to a public workspace so that everyone across the organization can use it to access the analytical insights that dashboard provides. Depending on your installation, you can also designate the public workspace as the collection of customer-facing dashboards.

When the dashboard you are moving contains a linked visual that is used by another dashboard in the workspace, you have two options: to clone it or to move it. For more information on what happens in each case, see the following diagram. In this example, Dashboard B is moved from Workspace I (private) to Workspace II (public). Visual c is a linked visual, used by both Dashboard C and Dashboard B.



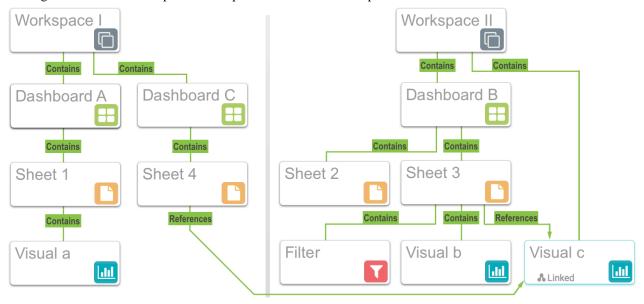
Cloning linked visuals

You can clone the linked Visual c. This creates a new Visual d in Workspace II. The new Visual d is also linked. Dashboard C in Workspace I remains unchanged: Visual c is still there, and it is still a linked visual.



Moving linked visuals

If you choose to move the linked Visual c, it remains a linked visual in its new location in Workspace II. However, this has an impact on Dashboard C in Workspace I. While Visual c is still part of the dashboard, it is referenced in an external workspace. Because Visual c is no longer part of the same workspace, users who do not have sufficient permissions for Workspace II will not be able to see the visual from Workspace I. This is likely to happen when moving dashboards from the public workspace into a custom workspace.



Moving private dashboards to public workspace

About this task

After creating a dashboard in your own private workspace and testing it, you can 'publish' it to the public workspace, where it is available to everyone with (at minimum) viewing privileges for the related datasets.

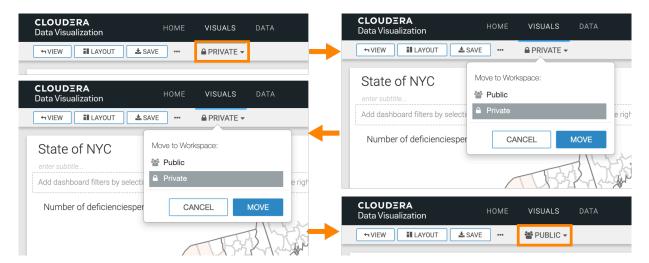
A dashboard owner can designate a private dashboard as public at any time, simply by moving it from the Private workspace to Public workspace.

Procedure

- 1. Click PRIVATE on the top menu of the dashboard.
- 2. In the drop-down menu, select an alternate workspace for the dashboard. In this example, Public is chosen.
- 3. After selecting the new workspace, click SAVE.



Note: The dashboard is now tagged as Public. You can check this by navigating to the Visuals interface, and selecting and expanding the destination workspace.



This process works for moving dashboards between private, public and custom workspaces, in any direction. You just need the adequate privileges to perform the action.



Important: A dashboard cannot be reset to Private after it is added to an app.

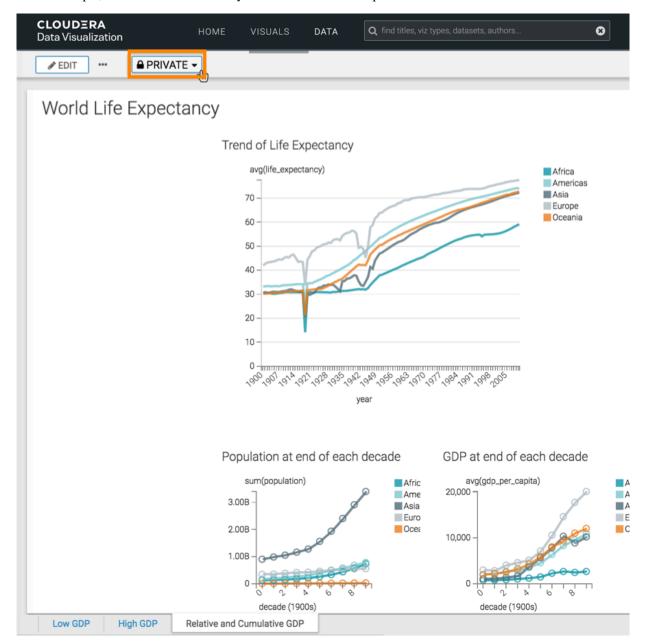
Moving private dashboards to a custom workspace

About this task

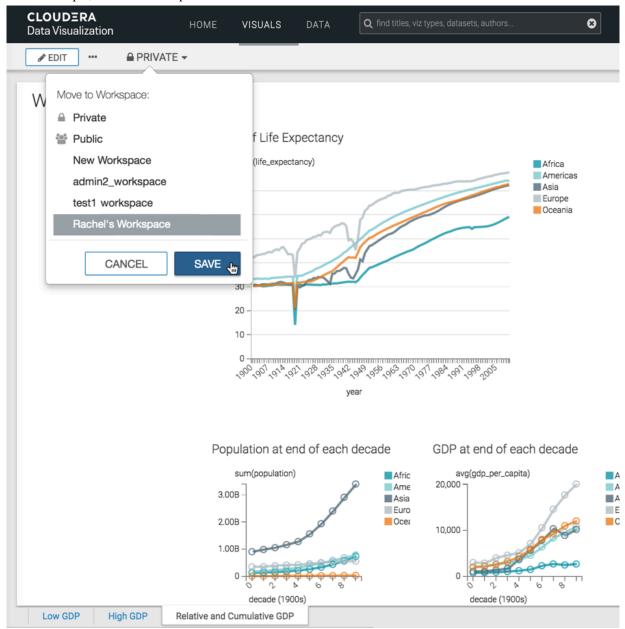
The following steps demonstrate how to move a dashboard from one workspace into another. In this example, the World Life Expectancy dashboard is moved from the private workspace to a custom workspace called Rachel's workspace.

Procedure

Click the name of the workspace on the top menu of the dashboard.
 In this example, the dashboard is currently in the PRIVATE workspace.



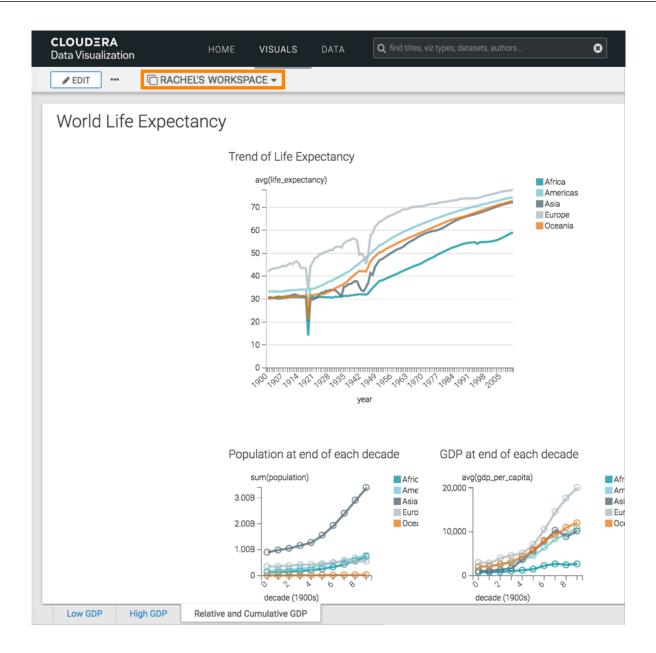
2. In the drop-down menu, select an alternate workspace for the dashboard, and click SAVE. In this example, Rachel's Workspace is chosen.



3. Because this dashboard uses linked visuals, you have an extra decision to make.

- Clone Visual: This creates a new linked visual, but breaks the connection between visuals.
- Move Visual: This option removes the linked visual from the workspace, and all the dashboards that use it start referencing it from its new workspace. Depending on the combination of security permissions, users who were able to see the visual when it was hosted in the original workspace may loose that visibility.

The dashboard is now tagged as RACHEL'S WORKSPACE.



Refreshing visuals manually in dashboards

CDP Data Visualization enables you to manually refresh visuals in dashboards.

About this task

If you have a slow back-end data connection and your dashboard is loading slowly, you can choose to load the filters first, specify their settings, and then manually load the visuals.

Procedure

- Open the dashboard in Edit mode.
 In this example, the World Life Expectancy dashboard is used.
- 2. In the Dashboard Designer, select the Settings menu.
- **3.** Click the General menu to expand it.

4. Select the Refresh visuals manually option.



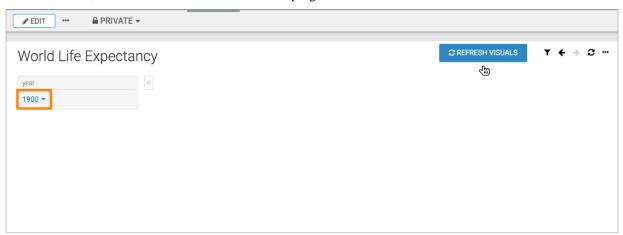
Refresh visuals manually

This adds a REFRESH VISUALS button to the dashboard.

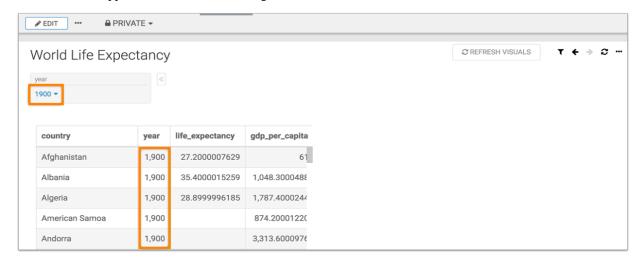
- 5. Under Filters, click the year field to add a new filter widget to the dashboard and select 1900 from the dropdown.
- 6. Click SAVE.
- 7. Switch to View mode.

Only the filter widget appears on the dashboard without any visuals.

8. To view visuals, click REFRESH VISUALS in the top right corner of the dashboard.

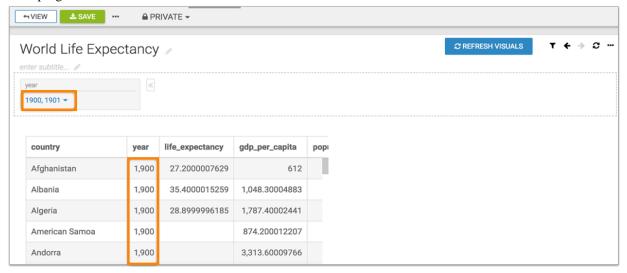


The visual now appears in the dashboard along with the defined filter.



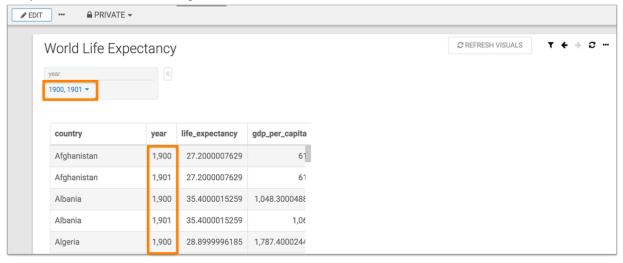
9. Add the year 1901 to the filter.

As soon as you change the filter, the filter refreshes to show both the values 1900, 1901, but the visual does not refresh. The year column continues to show only 1900. Also, the REFRESH VISUALS button again appears in the top right corner of the dashboard.



10. To render the updated visual, click REFRESH VISUALS.

The year column now shows the updated values, 1900 and 1901.



11. Click SAVE.

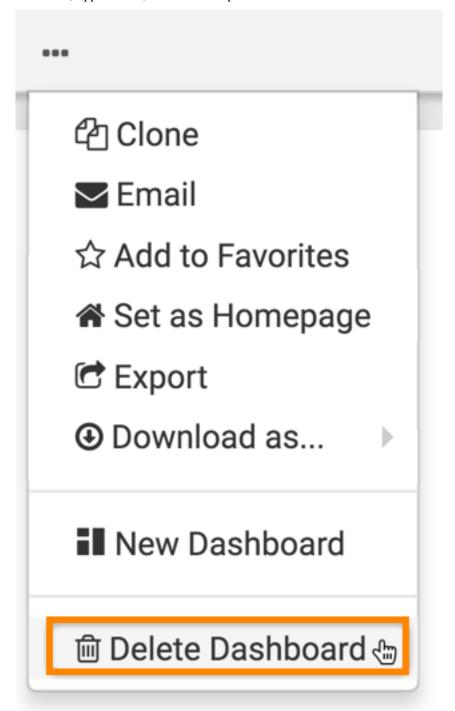
Deleting a dashboard

CDP Data Visualization makes it very simple to remove dashboards that you no longer use.

Procedure

1. Find the dashboard you want to delete. Open it either in Edit or View mode.

2. Click the (supplemental) menu in the top menu bar and select Delete Dashboard.



The delete confirmation modal window appears.

3. Click DELETE to confirm deleting this dashboard.