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Site Settings

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CLOUDERA

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Contents

Managing site settings.....	5
Dataset creation.....	6
Features.....	7
Dashboards.....	8
Visuals.....	8
CSV settings.....	12
Help menu.....	12
Customizing Help on the UI.....	12
Customizing Help through configuration file.....	13
Interactive map visual keys and server.....	15
Jobs.....	16
Email settings.....	17
Authentication.....	19
RBAC settings.....	20
Login page.....	20
Activity log.....	20
Debugging.....	21
Webhook settings.....	21

Remote data settings.....	22
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Managing site settings

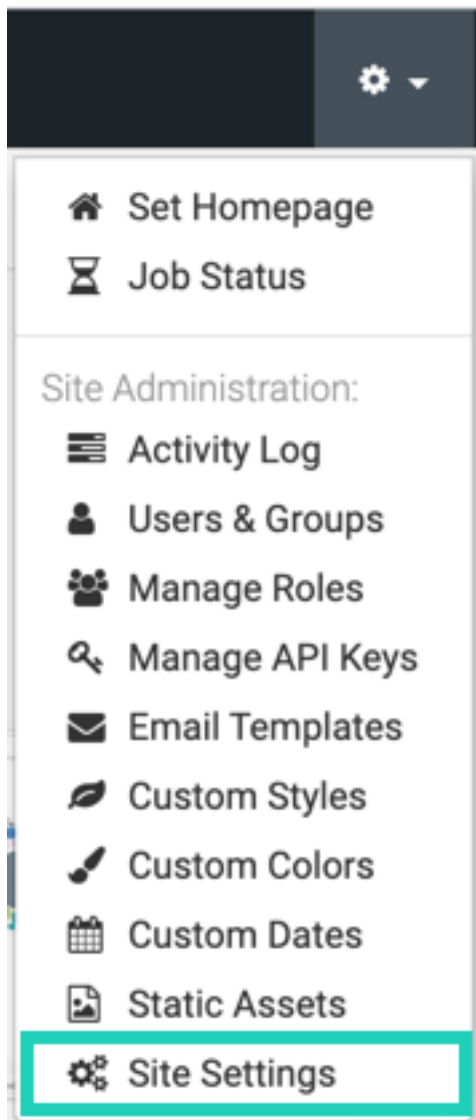
is highly configurable, with many site-wide settings, and settings at the level of individual visuals, dashboards, and filters. You can turn specific features on and off using the Site Settings menu.

About this task



Note: This menu is only available to users with administrative privileges.

Click the Gear icon to open the Site Administration menu, and select Site Settings.



In the Site Settings tab of the Site Administration window, you can adjust your site settings. See the links below for details on what options you can set.

Related Information

[Dataset creation](#)

[Features](#)

[Dashboards](#)

[Visuals](#)
[CSV settings](#)
[Help menu](#)
[Customizing Help on the UI](#)
[Customizing Help through configuration file](#)
[Interactive map visual keys and server](#)
[Jobs](#)
[Email settings](#)
[Authentication](#)
[RBAC settings](#)
[Login page](#)
[Activity log](#)
[Debugging](#)
[Webhook settings](#)
[Remote data settings](#)

Dataset creation

Enabling dataset field renaming

As a site administrator, you can automatically rename dataset fields to make them more readable.

Fields with underscores are converted to multiple-word fields. For example: un_region becomes Un Region.

To rename a field, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Dataset Creation, check the Enable automatic field renaming during dataset creation option.

Dataset Creation

Enable automatic field renaming during dataset creation

To automatically rename fields of existing datasets, see [Automatically renaming dataset fields](#).

Related Information

[Automatically renaming dataset fields](#)

Features

In , you can enable various features in the Site Settings menu.

Features

- Enable Derived Data
- Enable Custom Styles
- Enable Data Downloads from URL
- Enable Search (Tech Preview)
- Enable Search in Menu Bar (Tech Preview) ⓘ
- Enable Search Visual (Tech Preview) ⓘ

Enabling derived data

As a site administrator, you can enable derived data to perform high-level analysis, such as query stacking, cohort analysis, and back joins.

To enable derived data, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Features, check the Enable Derived Data option.

Enabling custom styling

As a site administrator, you can enable custom styling to set the appearance of visuals, dashboards, filters, and applications through CSS and JS scripting.

To enable custom styles, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Features, check the Enable Custom Styles option.

Proceed to using custom styles, as described in *Adding custom styles to visuals*.



Note: You must also have the Manage custom styles permission to use CSS and JS customizations.

Enabling data downloads from URL

To enable data download from a URL, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Features, check the Enable Data Downloads from URL option.

Related Information

[Adding custom styles to visuals](#)

Dashboards

Setting default dashboard width

As a site administrator, you can specify a default width for all new dashboards at the site level. To specify a width for the dashboards, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Dashboards, enter the measurement for Default Dashboard Width (in pixels).

If you clear the field, all dashboards automatically resize to the full width of the browser window.

Dashboards

Default Dashboard Width

Clear field for full width.

Visuals

In , you can enable various advanced visual options.

About this task

Visuals

- Enable Explore ✨
- Enable Visual Transitions

Max Count Of Trellises To Be Displayed Before Warning

Maximum data results size for visuals (in MB)

Maximum data rows for visuals

Maximum width of canvas visuals

Enabling explore

You can use the explore function in [to](#) find the best visualization for your data request.

The Enable Explore option suggests new visual types and options based on the information you already use in existing visuals. See, *Exploring visual options*.

To enable the explore function, follow these steps:

1. Click the Gear icon to open the Site Administration menu, and select Site Settings.
2. Under Visuals, select the Enable Explore option.

Enabling visual transitions

You can use the transitions function to animate visuals during loading and refresh operations. The visual types that use visual transitions include bars, lines, combo, area, scatter, grouped bar, histogram, sparklines, pie, packed bubbles, and correlation heat map.

To enable the transition function, follow these steps:

1. Click the Gear icon to open the Site Administration menu, and select Site Settings.
2. Under Visuals, select the Enable Visual Transitions option.

Setting maximum count of trellises to be displayed before warning

To adjust the maximum count of trellises, follow these steps:

1. Click the Gear icon to open the Site Administration menu, and select Site Settings.

2. Under Visuals, select the appropriate number for the maximum count of trellises.

Setting maximum data results size for visuals

To adjust the maximum data results size, follow these steps:

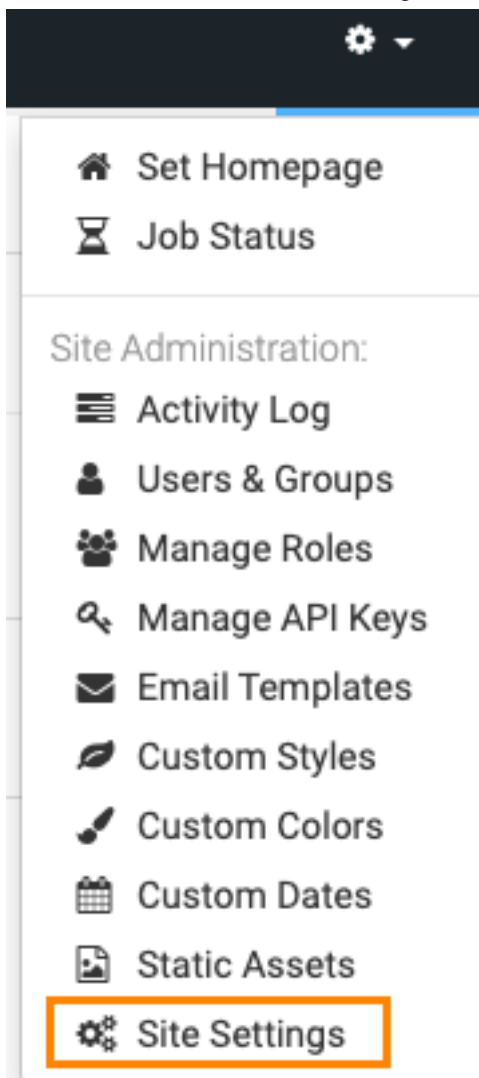
1. Click the Gear icon to open the Site Administration menu, and select Site Settings.
2. Under Visuals, enter a value in the Maximum data results size for visuals (in MB) text box.

Setting the maximum data rows in visuals

As a site administrator, you can provide an upper limit on the number of rows rendered in a visual request.

Sometimes an inexperienced or malicious user can create a visual requesting billions of rows. This may result in excessive resource consumption at the server level and the result might be too large to render in the client browser. To avoid this scenario, an administrator can provide an upper limit on the number of rows rendered in a visual request.

1. Click the Gear icon on the main navigation bar to open the Site Administration menu, and select Site Settings.



2. Scroll down to the Visuals option and enter a value in the Maximum data rows for visuals text box.

Visuals

- Enable Explore ✨
- Enable Visual Transitions

Max Count Of Trellises To Be Displayed Before Warning

Maximum data results size for visuals (in MB)

Maximum data rows for visuals

Maximum width of canvas visuals

Downloading maximum data rows in visuals

Sometimes an inexperienced or malicious user can create a visual requesting billions of rows. This may result in excessive resource consumption at the server level and too large to render in the client browser. To avoid this, you as a site administrator can provide an upper limit on the number of rows rendered in a visual request.

To set the maximum data row value, follow these steps:

1. Click the Gear icon to open the Site Administration menu, and select Site Settings.
2. Under Visuals, enter a value in the Maximum data rows for visuals text box.

At the individual visual level, the setting in the Maximum number of rows to fetch option in the Data menu of the Visual Designer overrides this default behaviour.

At the site level, the setting in the Maximum data rows for visuals option overrides the setting in the Maximum number of rows to fetch option.

Setting the maximum width of canvas visuals

Cloudera recommends that you designate a reasonable maximum width for canvas visuals considering performance reasons. Overly wide visuals that display streaming data may cause the Internet browser to crash.

To set the maximum width value, follow these steps:

1. Click the Gear icon to open the Site Administration menu, and select Site Settings.
2. Under Visuals, enter a value in the Maximum width of canvas visuals text box.

Related Information

[Exploring visual options](#)

[Adding custom styles to visuals](#)

CSV settings

Enabling CSV or Excel download by default

As a site administrator, you can download data in a visual in CSV or Excel format. To make this download option default, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under CSV download, check the Enable "Download as CSV/Excel" by default option.

Downloading maximum number of rows in CSV files

Sometimes an inexperienced or malicious user can download a large number of rows. This may result in excessive resource consumption at the server level.

To avoid this, as a site administrator, you can provide an upper limit on the number of rows downloaded in a CSV file.

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under CSV download, enter a value in the Maximum data rows for download requests text box.

Maximum data rows for download requests



Important: This setting overrides the setting specified by the user in the Number of rows downloaded during CSV export and Detailed Data option in the Data menu of the Visual Designer. See *Changing number of rows to download* for more information.

Related Information

[Changing number of rows to download](#)

Help menu

As an administrator, you can customize the default settings of the Help menu in . You can edit or change the link for Documentation and Support directly in Data Visualization, or in the settings.py file.

Related Information

[Customizing Help on the UI](#)

[Customizing Help through configuration file](#)

Customizing Help on the UI

You can change the default settings of the Help menu in . You can customize the links for Documentation and Support on the Site Settings interface.

About this task

In Site Settings, under Help Menu change the following:

Help Menu

Text to display for documentation link

URL for documentation link

Email address for Support

Procedure

- Change Text to display for documentation link from default Docs to another title, such as Technical Documentation.
- Change URL for documentation link from default `https://docs.cloudera.com/data-visualization/cloud/index.html` to another URL, such as `http://books.mycompany.com`.
- Change Email address for Support from default `support@cloudera.com` to another email, such as `support@mycompany.com`.

Customizing Help through configuration file

About this task

You can customize the Help menu on the main navigation bar by deleting default links provided by , or by adding new links.

To customize the Help menu, modify the local configuration file, such as `settings.py`, and restart the server.

Components of the Help Menu

By default, the Help menu contains links to What's New in the current release, Documentation, Knowledge Base, YouTube Channel, Support Email, licensing status, and the current version of .

To modify this menu, you must change the corresponding settings from TRUE to FALSE.

HELP_SHOW_WHATSNEW

Set to TRUE to show the release number of the running instance of .

```
HELP_SHOW_WHATSNEW = True
```

This is TRUE by default. To remove the "What's new" link, set the parameter to FALSE:

```
HELP_SHOW_WHATSNEW = False
```

HELP_SHOW_DOCUMENTATION

Set to TRUE to show the link to our documentation at documentation.arcadiadata.com/release_number/.

```
HELP_SHOW_DOCUMENTATION = True
```

This is TRUE by default. To remove the "Documentation" link, set the parameter to FALSE:

```
HELP_SHOW_DOCUMENTATION = False
```

HELP_SHOW_SUPPORT_EMAIL

Set to TRUE to show a link to contact our support team at support@arcadiadata.com.

```
HELP_SHOW_SUPPORT_EMAIL = True
```

This is TRUE by default. To remove the "Support" link, set the parameter to FALSE:

```
HELP_SHOW_SUPPORT_EMAIL = False
```

HELP_SHOW_VERSION

Set to TRUE to show the release number of the running instance of .

```
HELP_SHOW_VERSION = True
```

This is TRUE by default. To remove the version, set the parameter to FALSE:

```
HELP_SHOW_VERSION = False
```

HELP_SHOW_LICENSE

Set to TRUE to show if your license is valid.

```
HELP_SHOW_LICENSE = True
```

This is TRUE by default. To remove the license information, set the parameter to FALSE:

```
HELP_SHOW_LICENSE = False
```

HELP_MENU_LINKS

To add custom links that supplement the default Data Visualization help links, use the `HELP_MENU_LINKS` parameter and a list of links in the form of `type:link, link:url_address, and label:link_label`.

You can also insert a divider between these custom links, in the form: `type:divider`,

```
HELP_MENU_LINKS = [  
  {  
    "type": "link",  
    "link": "url_address_1",  
    "label": "link_label_1",  
  }  
  {  
    "type": "link",
```

```

    "link": "url_address_2",
    "label": "link_label_2",
  }
  ...
  {
    "type": "divider",
  }
  {
    "type": "link",
    "link": "url_address_n",
    "label": "link_label_n",
  }
]

```

Sample Help Menu Configuration

Here is a sample of configuration settings for the Help menu:

```

# To display the default Data Visualization help links in the Help menu, set
  the flag to "True"
HELP_SHOW_WHATSNEW = True
HELP_SHOW_DOCUMENTATION = True
HELP_SHOW_SUPPORT_EMAIL = True
HELP_SHOW_VERSION = True

# To remove an Arcadia link from the Help menu, set the flag to "False"
HELP_SHOW_LICENSE = False
# To add new links in the Help menu, enter the following code:
#In this example, we are adding links to Knowledge Base and YouTube Channel.
HELP_MENU_LINKS = [
  {
    "type": "link",
    "link": "https://www.arcadiadata.com/resources/knowledge-base/",
    "label": "Knowledge Base",
  },
# You can also specify a divider between the two rows as follows:
# {
#   "type": "divider",
# },
# {
  "type": "link",
  "link": "https://www.youtube.com/channel/UCmubDZSISQMKg1Q0HXo03HQ",
  "label": "YouTube Channel",
},
]

```

Interactive map visual keys and server

Enabling API keys for interactive map visuals

Your organization must obtain its own credentials for Google Maps, either Google API Id or Google Client Id. To obtain Google Maps keys, see [Google Maps APIs](#).

For the Mapbox interface, your organization must get a Mapbox Token and the Mapbox Style ID, specified for each visual in the Settings menu. already has a default mapbox token. To obtain new Mapbox tokens and Style IDs, see [Mapbox](#).

To specify the keys, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to the Interactive Map Visual Keys and Server settings.
3. Enter the necessary information.
4. Click Save to preserve the changes to the site settings.

Specifying an atlas mapbox server at the site level

You can use a [Mapbox](#) server or specify an Atlas Mapbox server at the site level, to run Mapbox APIs on your own infrastructure, whether on your own private cloud or on-premises.

To specify an Atlas Mapbox server at the site level, follow these steps:

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to the Interactive Map Visual Keys and Server settings.
3. Enter the IP address or hostname of the Atlas Mapbox server in the IP/Hostname of Atlas Mapbox Server (optional) text box.

Interactive Map Visual Keys and Server

Google API Id

Google Client Id

Mapbox Token

IP/Hostname of Atlas Mapbox Server (optional)



Note: In an interactive map visual, the Atlas Mapbox server for visual setting under the Settings > Map Server menu, overrides the IP/Hostname of Atlas Mapbox Server (optional) setting in the Site Settings interface.

Jobs

enables you to schedule a number of jobs, either at fixed times, or as a response to triggering conditions. You need to restart the ArcViz server for changes to take effect.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Under Jobs, check the Enable scheduled jobs option.

Requires Visualization Server restart for changes to take effect.

Enable scheduled jobs ⓘ

Email settings

As a site administrator, you can customize email settings to allow users can to sharing visuals through email.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Email Settings and check the Allow users to email visuals option to enable sharing visuals through email.
3. Enter the Email Address and Password.

Optionally, you can also enter your Username. If you do not enter anything, your email address appears as the default value.

These details have to belong to a valid account, and all future emails originate from this account.

4. Enter the SMTP Host.
5. Enter the Port.
6. [Based on provider] Select Use TLS.
7. [Based on provider] Select Use SSL.
8. Enter the Default email subject prefix. The default prefix value is 'Cloudera Data Visualization'.
9. Test the email functionality by clicking SEND TEST EMAIL.

If everything is OK with the settings, you should see a success message:

Email Status: 1 sent

10. SAVE the updated site settings.

Email Settings

Allow users to email visuals

Email Address

Username

Optional: Defaults to email address if empty

Password

SMTP Host

Port

Use TLS

Use SSL

Default email subject prefix

SEND TEST EMAIL



Note: When using Google Email (Gmail), you may be using 2-factor authentication, which requires an app password. If you are not using 2-factor authentication, you must enable access for less secure apps. For more information, please review the following external documentation:

- [Less Secure Apps](#)
- [Sign in using App Passwords](#)

What to do next

Start using email, as described in *Email Templates*.

Related Information

[Creating new email templates](#)

Authentication

As an administrator, you can adjust authentication settings in .

Setting SSO for authentication

1. Click the Gear icon on the Main Navigation Bar to open the Site Administration menu and select Site Settings.
2. In the Site Settings window, scroll down to Authentication.
3. Check Permit authentication via the REMOTE_USER http header to enable user authentication with the login credentials and log users in automatically.
 - In CML, this SSO option is enabled by default.
 - In CDW, this SSO option is enabled by default.

Setting password requirements

For password control, you can specify the following requirements:

- **Minimum password length**
Specify the minimum number of characters for a password. The default value is 5.
- **Require that password contains one or more numbers**
Select this option to enforce the rule that the password must contain a numerical value between 0 and 9.
- **Require that password contains one or more symbols**
Select this option to enforce the rule that the password must contain a symbol. Symbols include all characters on the keyboard other than letters or numbers.

Authentication

Permit authentication via the REMOTE_USER http header

Minimum password length

Require that passwords contain one or more numbers

Require that passwords contain one or more symbols

RBAC settings

enables you to define a default group membership for new users.

RBAC Settings

Default group membership for new users

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to RBAC Settings and enter the group name.
3. SAVE the updated site settings.

Login page

enables you to define the text that appears on the login screen.

Login Page

Instructions to display on login page

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Login Page and enter your instructions.
3. SAVE the updated site settings.

Activity log

In , you can enable the Server Settings tab in the Activity Log screen.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Activity Log and check the Enable the "Server Settings" tab within the "Activity Log" screen option.

Activity Log

Enable the "Server Settings" tab within the "Activity Log" screen

3. SAVE the updated site settings.

Debugging

In , as an administrator, you can enable various debugging options.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Debugging and check the option(s) you want to enable:

Debugging

- Verbose Error Reporting. Display Javascript page errors on screen in app view/edit pages
 - Enable the "Show Usage Info" and Ctrl-Shift-G shortcut to view page profiles within all pages
 - Additionally enable the Ctrl-Shift-G shortcut to view page profiles within dashboard/app view pages
-

3. SAVE the updated site settings.

Webhook settings

enables you to interact with webhooks.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Webhook Settings and check the Allow users to interact with webhooks option.
3. Enter URLs that webhook actions are permitted to interact with in the text box.

4. SAVE the updated site settings.

Webhook Settings

Allow users to interact with webhooks

Whitelist of URLs that webhook actions are permitted to interact with

Multiple values should be separated by a new line.

Remote data settings

enables you to add the URLs that remote data columns can be fetched from.

Procedure

1. Click the Gear icon to open the Site Administration menu and select Site Settings.
2. Scroll down to Remote Data Settings and enter the URL(s) that remote data columns can be fetched from.
3. SAVE the updated site settings.

Remote Data Settings

Whitelist of URLs that remote data columns can be fetched from

The url used in cviz_rest functions need be added here. Multiple values should be separated by a new line.