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Workspaces

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CLOUDERA

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Contents

Creating a workspace

In addition to the standard public workspace that is shared by all users, and the single private workspace that each user has, administrators and users who have the Create Workspace privilege can create custom workspaces in CDP Data Visualization.

About this task

Workspaces may be shared with specific users and user groups to develop and view dashboards that are inherently useful to their line of business. Within each of these workspaces, each user has a defined access level: View Only, Edit, or Manage.

Only users with Create Workspace system-level privilege can perform this task.

Note: All administrators have full privileges. Users without a defined access level cannot see the workspace or any of its artifacts.
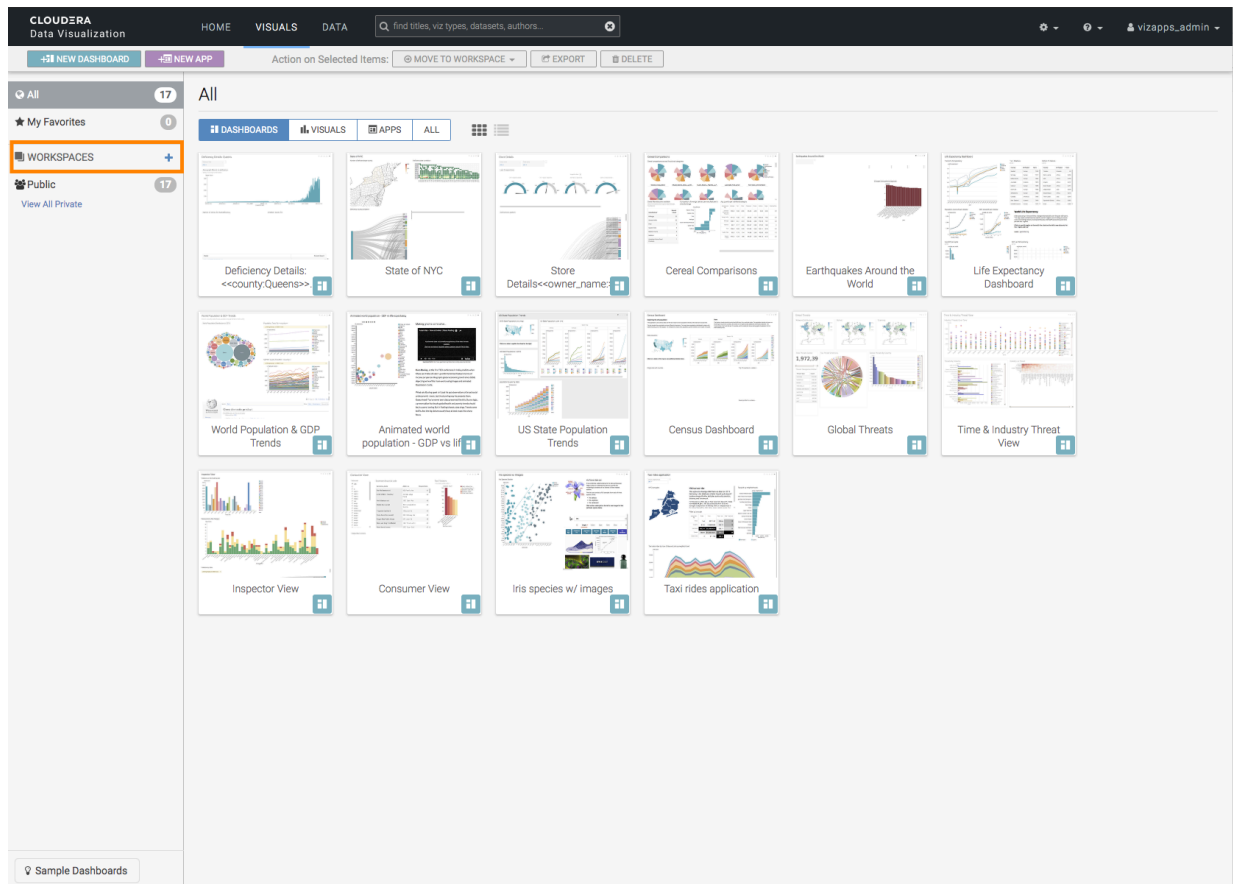
For information about the different types of workspaces, see *Workspaces in CDP Data Visualization*.

Procedure

1. On the main navigation bar, click Visuals.

2. On the left side menu, find the Workspaces section.

3. Click the Plus icon.

> **Note:** This icon is only available to users who have the Create Workspace privilege.

4. In the Create Workspace modal window, enter the Name and Description of the new workspace.

5. In the user textbox, enter the account name of an existing user.
6. In the group textbox, enter the name of one or more existing user groups. To include everyone, type Everyone.

> **Note:**
>
> If a user has a permission either through her username and group membership, or through multiple groups, that user has the broadest possible permissions. For example, if the user is part of "visual viewer" group and "dashboard editor" group (which has manage permission), that user has the manage permission.
>
> As you enter a user or group name, the autocomplete functionality makes it easier to find an existing user or group.

7. Click Add.
8. After adding all users and user groups, select the appropriate type of access: View Only, Edit, or Manage.

   - View only

     Users with this privilege can see the contents of the workspace, and access them in view mode. However, they are unable to make any changes.
   - Edit

     Users with this privilege can move dashboards in and out of the workspace. With adequate dataset permissions, they can also edit, delete, or clone any visuals, dashboards, or apps within this workspace.
   - Manage

     Users with this privilege can change the name of the workspace, delete it when it is empty, add and remove users, and add and remove user groups. This also includes all Edit privileges.

   > **Note:** The user admin is part of the access matrix, as the creator of this new workspace. If the creator is removed, and the creator is not an administrator, she loses access to this workspace.

9. Click Save.

   The workspace appears in the list of workspaces. This new workspace does not have any dashboards or visuals assigned to it at this time.

Related Information

Workspaces in CDP Data Visualization

Changing workspace properties

You can change the visibility and accessibility of a workspace in CDP Data Visualization.

About this task

All users can edit the Public workspace, by default. However, administrators can manage the public workspace and edit the permissions for all other users. The only things that administrators cannot change are the name and description of the Public workspace, and they cannot delete it.
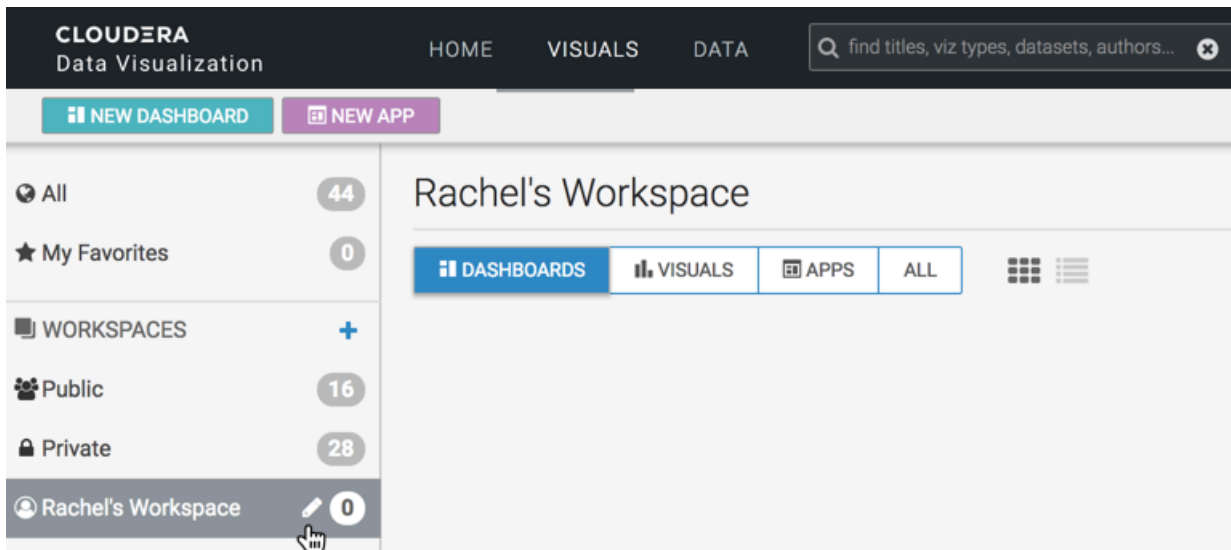
For information about the different types of workspaces, see *Workspaces in CDP Data Visualization*.

Procedure

1. On the main navigation bar, click Visuals.

2. On the left side menu, in the Workspaces section, find and select the workspace.

3. Hover over its title until a (pencil) icon appears, and click it.

4. In the Edit Workspace modal window, make the required changes.

For example, add a new user by entering her name in the (user) menu and clicking Add.

With the autocomplete functionality, as you enter a user or group name, it is easier to find an existing user or group in the system.

Remember to set the correct access level for the new user.

Edit Workspace

Name	Rachel's Workspace
Description	Dashboards that Rachel and her team create

Rebecca × type username   type group name, type 'Everyone' for all   ADD

		View Only	Edit	Manage	
👤	admin	○ View Only	○ Edit	◉ Manage	✖
👥	Internal_Audit	◉ View Only	○ Edit	○ Manage	✖
👤	Rachel	○ View Only	◉ Edit	○ Manage	✖

NOTE: Users must also have appropriate privileges to the underlying dataset(s)

🗑 DELETE WORKSPACE   CLOSE   SAVE

To remove an existing user or user group from the access matrix, click the (cross) icon on that row.

Edit Workspace ✕

Name	Rachel's Workspace	
Description	Dashboards that Rachel and her team create	

👤	type username	👥	type group name, type 'Everyone' for all	ADD

👤	admin	○ View Only	○ Edit	◉ Manage	✖
👥	Internal_Audit	◉ View Only	○ Edit	○ Manage	✖
👤	Rachel	○ View Only	◉ Edit	○ Manage	✖
👤	Rebecca	○ View Only	◉ Edit	○ Manage	✖

NOTE: Users must also have appropriate privileges to the underlying dataset(s)

🗑 DELETE WORKSPACE   CLOSE   **SAVE**

5. Click Save.

For example, add a new user by entering her name in the user menu and clicking Add.

With the autocomplete functionality, as you enter a user or group name, it is easier to find an existing user or group in the system.

Note: Remember to set the correct access level for the new user.

Edit Workspace

Name	Rachel's Workspace
Description	Dashboards that Rachel and her team create

	Rebecca × type username	type group name, type 'Everyone' for all	ADD

admin	○ View Only	○ Edit	⦿ Manage	✖
Internal_Audit	⦿ View Only	○ Edit	○ Manage	✖
Rachel	○ View Only	⦿ Edit	○ Manage	✖

NOTE: Users must also have appropriate privileges to the underlying dataset(s)

🗑 DELETE WORKSPACE   CLOSE   **SAVE**

To remove an existing user or user group from the access matrix, click the X icon on that row.

Deleting a workspace

You can delete workspaces in CDP Data Visualization.

About this task

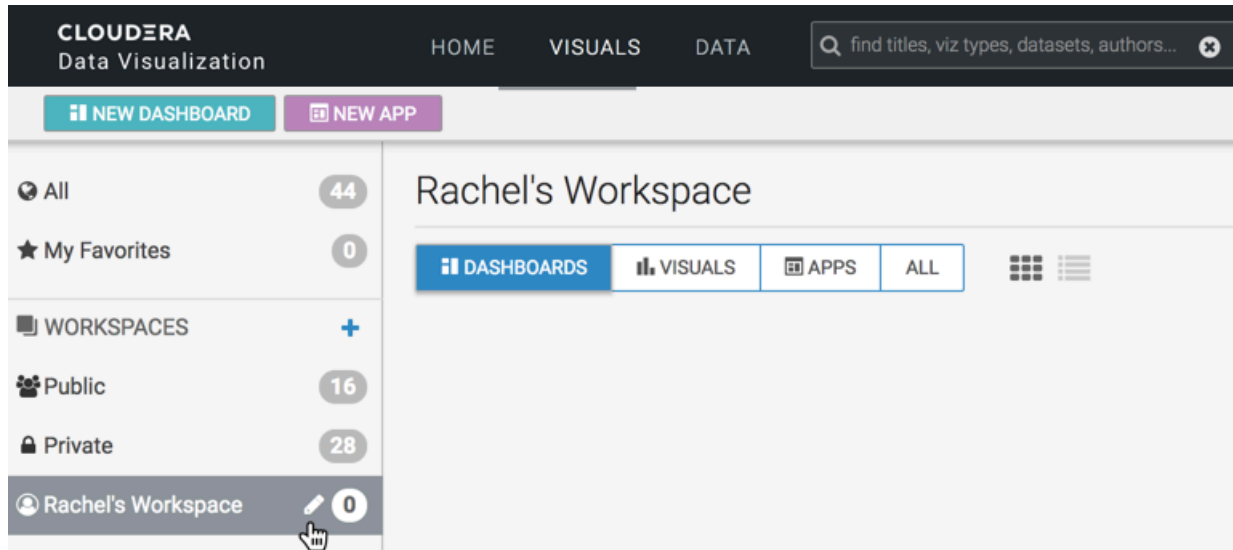To delete workspaces, you must have Manage privilege for the workspace.

For information about the different types of workspaces, see *Workspaces in CDP Data Visualization*.

Procedure

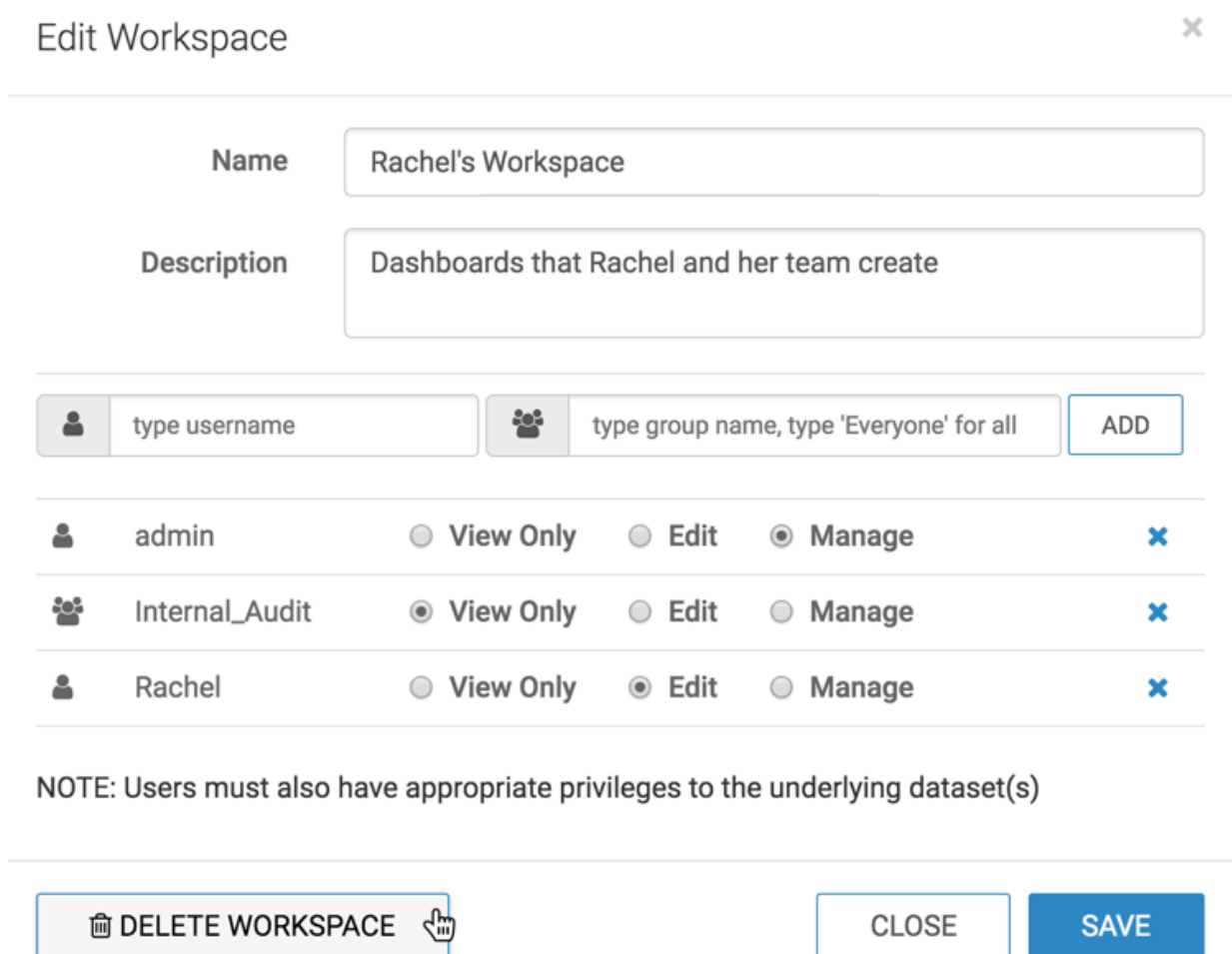**1.** On the main navigation bar, click Visuals.

2. On the left side menu, in the Workspaces section, find and select the workspace.

3. Hover over its title until a (pencil) icon appears, and click it.

4. In the Delete Confirmation modal window, type DELETE, and then click Delete.

Delete Confirmation   ✕

Workspace `Rachel's Workspace` will be deleted

To confirm, type the word DELETE in the field below and then click the
Delete button.

DELETE

CANCEL   DELETE

The workspace no longer appears in the list of workspaces.

Related Information

Workspaces in CDP Data Visualization