Cloudera Data Visualization 7.2.3

Managing Jobs

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Creating new email jobs

Cloudera Data Visualization supports three type of email jobs:

Immediate email

You can share existing visuals with other users on an ad-hoc basis.

About this task

Follow these steps to email a visual, a sheet, or a dashboard of your choice. You can accomplish this task either from Edit mode or from View mode.

Before you begin

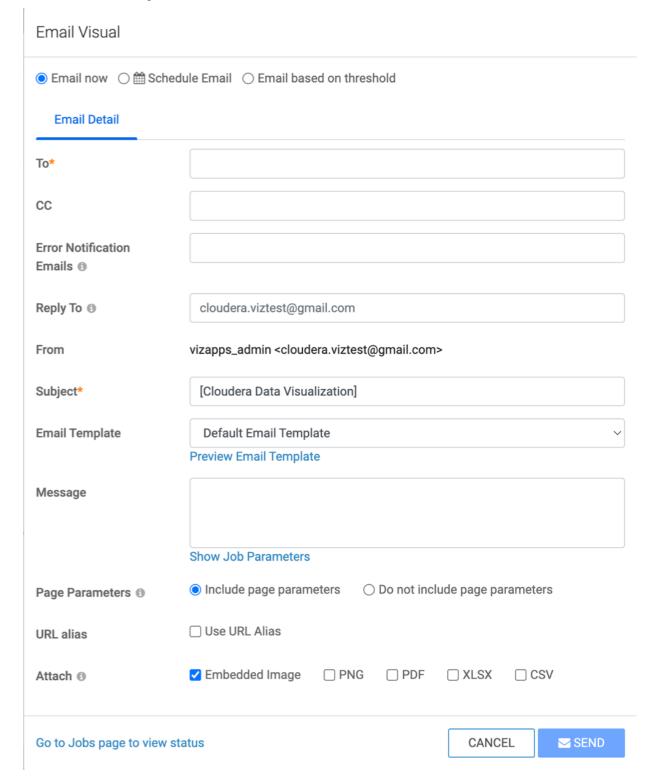
You have an email template available for use. For instructions, see Creating new email templates.

Procedure

- 1. Open the visual or dashboard that you want to include in the email. This example walks you through emailing a visual.
- 2. Click the (ellipsis) icon in the upper right corner to open the supplemental menu, and select Email from the drop-down menu.

The Email modal appears.

3. Select the Email now option.



4. Fill in the email details.

Fields marked with an asterisk are mandatory.

- To Enter the email addresses of the primary recipients of the message.
- CC Enter the email addresses of other recipients.
- Error Notification Emails Enter an email address where you want to receive data visualization error messages.
- Reply To Enter an email address if you would like responses to go to a different email address than the sender.
- From You can set the value of this field in Site Settings.
- Subject You can change the default title of the email.



Note:

The subject is the prefix you specified when enabling email, with the title of the visual added. The default prefix is [Cloudera Data Visualization].

- 5. Under Email Template, leave the Default Email Template selected.
- **6.** If you want to see how the template looks, click Preview Email Template.



Note: Only users with administrative privileges can create and manage email templates. For more information, see *Creating new email templates*.

- 7. Enter the text of the email in the Message field.
- 8. For visuals that have parameterized fields on their shelves, in Page Parameters you can choose:
 - Include page parameters (default)
 - Do not include page parameters
- **9.** You can add a short URL in the email.

You can create a new alias or use an existing one that you created earlier.



Important:

Add the Current Sheet Link to the message, otherwise, the URL alias will not appear in the email.

- a. Click the Use URL Alias checkbox.
- **b.** Choose an existing URL alias or create a new one.
- c. Click Show Job Parameters under the Message textbox.
- d. Click Current Sheet Link.

The <<app_url>> appears in the message.

- 10. For Attach options, decide whether you want to embed the image in the email and select what format to use:
 - Embedded Image (default)
 - PNG
 - PDF
 - XLSX
 - CSV

11. Click SEND.

The system notifies the user that an email is being prepared.

Sending email



Email will be sent in a few seconds...

After the operation succeeds, you get the following message:

Success



Email successfully sent

What to do next

You may choose to see the list of pending emails, cancel running jobs, or re-send an email. Click the link Go to Jobs page to view status on the UI for details.

For more information, see Managing jobs.

Related Information

Creating new email templates Managing jobs

Schedule-based email

You can schedule regular emails of visuals, sheets, and dashboards. Scheduled jobs run on a schedule, or are triggered by measures on the dataset reaching a defined threshold.

About this task

Follow these steps to schedule sending emails of visual, sheet, or dashboard. You can accomplish this either in Edit or in View mode.

Before you begin

You have an email template available for use. For instructions, see Creating new email templates.

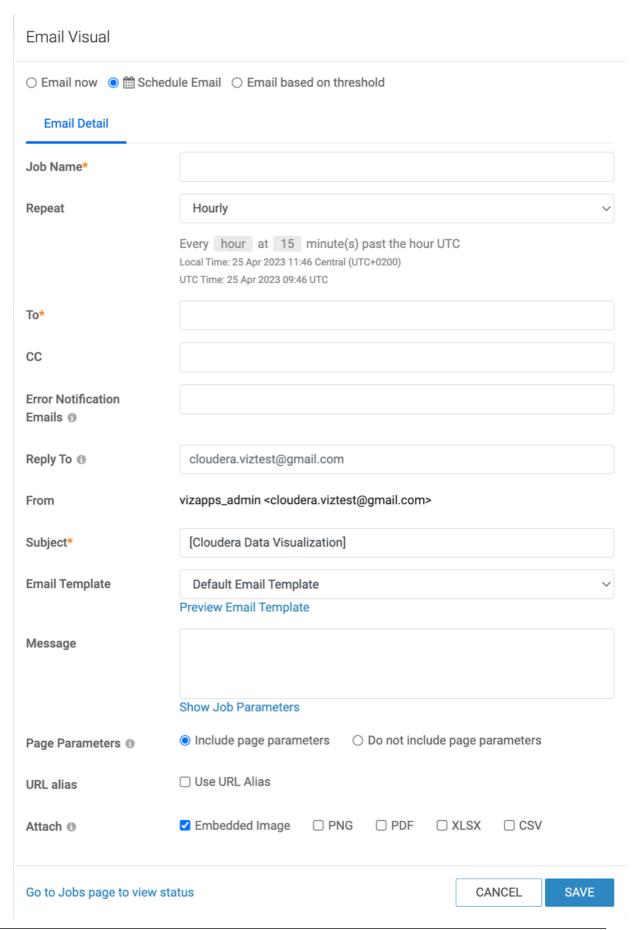
Before you schedule an email, check the Enable scheduled jobs option in Site Settings Jobs . For more information, see Enabling scheduled jobs in the Site Settings documentation.

Procedure

- 1. Open the visual or dashboard that you want to include in the email.
 - This example walks you through emailing a visual.
- 2. Click the (ellipsis) icon in the upper right corner to open the supplemental menu, and select Email from the drop-down menu.

The Email modal appears.

3. Select the Schedule Email option.



- **4.** In the Job Name text box of the Email Detail tab, enter the name of the scheduled job.
- **5.** In the Repeat field, select an existing schedule interval:
 - · Hourly (default)
 - Daily
 - · Every Weekday
 - Weekly
 - · Monthly
 - · Quarterly
 - · or any existing custom schedule.



Note:

You can also select Create New Schedule. This option is available to Admin users only.

- **6.** Fill in the email details:
 - In the To text box, enter the email addresses of the primary recipients of the message.
 - In the CC text box, enter the valid email addresses of other recipients.
 - In the Error Notification Emails text box, enter an email address where error notifications will be sent to.
 - In the Reply To text box, add an email addres if you want responses to go to a different email address than the sender.
 - The value of the From field is configured on the Site Settings interface.
 - In the Subject text box, you can change the title of the email.



Note:

The subject is the prefix you specified when enabling email, with the title of the visual added. The default prefix is [Cloudera Data Visualization].

- 7. Under Email Template, leave Default Email Template selected.
- 8. If you want to see how the template looks, click Preview Email Template.



Note: Only users with administrative privileges can create and manage email templates. For more information, see *Creating new email templates*.

- 9. Enter the text of the email in the Message field.
- 10. For visuals that have parametrized fields on their shelves, in the Page Parameters you can chose one of these:
 - Include page parameters (default)
 - Do not include page parameters, which includes default picklist parameters.
- 11. You can add a short URL in the email.

You can create a new alias or use an existing one that you created earlier.



Important:

Add the Current Sheet Link to the message, otherwise, the URL alias will not appear in the email.

- a. Click the Use URL Alias checkbox.
- **b.** Choose an existing URL alias or create a new one.
- c. Click Show Job Parameters under the Message textbox.
- **d.** Click Current Sheet Link.

The <<app_url>> appears in the message.

12. For Attach options, choose one of these:

- Embedded Image (default)
- PNG
- PDF
- XLSX
- CSV

13. Click SAVE.

The system notifies you that the schedule was created successfully.

Related Information

Creating new email templates

Threshold-based email

You can set up email notifications when a specified triggering condition occurs.

About this task

Follow these steps to define triggering conditions and triggered emails for a visual, a sheet, or a dashboard. You can accomplish this either in Edit or in View mode.

Before you begin

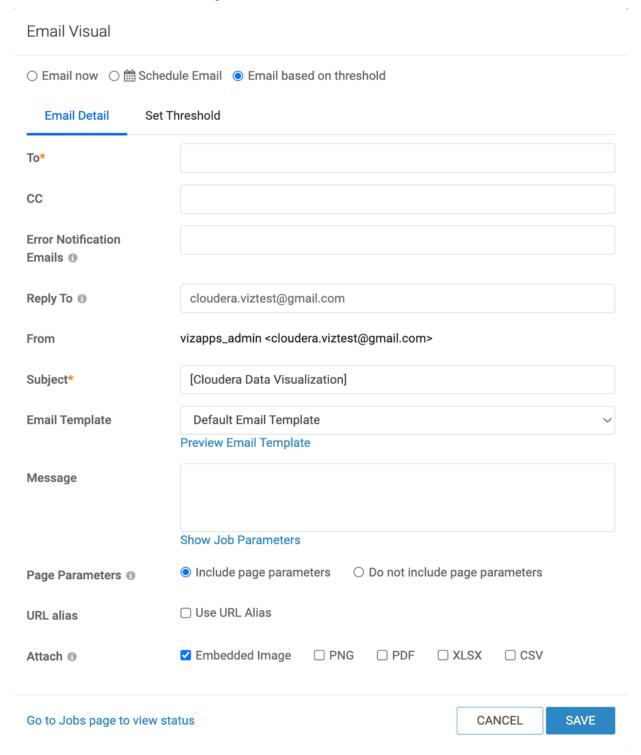
You have an email template available for use. For instructions, see Creating new email templates.

Procedure

- 1. Open the visual you want to include in the email.
- 2. Click the (ellipsis) icon in the upper right corner to open the supplemental menu, and select Email from the drop-down menu.

The Email modal appears.

3. Select the Email based on threshold option.



4. Fill in the email details.

Fields marked with an asterisk are mandatory.

- To Enter the email addresses of the primary recipients of the message.
- CC Enter the email addresses of other recipients.
- Error Notification Emails Enter an email address where you want to receive data visualization error messages.
- Reply To Enter an email address if you would like responses to go to a different email address than the sender.
- From You can set the value of this field in Site Settings.
- Subject You can change the default title of the email.



Note:

The subject is the prefix you specified when enabling email, with the title of the visual added. The default prefix is [Cloudera Data Visualization].

- 5. Under Email Template, leave the Default Email Template selected.
- **6.** If you want to see how the template looks, click Preview Email Template.



Note: Only users with administrative privileges can create and manage email templates. For more information, see *Creating new email templates*.

- 7. Enter the text of the email in the Message field.
- 8. For visuals that have parameterized fields on their shelves, in Page Parameters you can choose:
 - Include page parameters (default)
 - Do not include page parameters
- **9.** You can add a short URL in the email.

You can create a new alias or use an existing one that you created earlier.



Important:

Add the Current Sheet Link to the message, otherwise, the URL alias will not appear in the email.

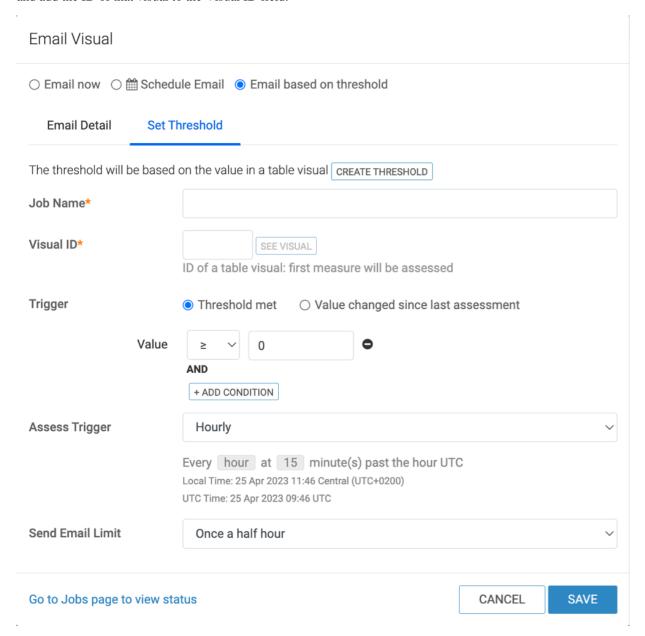
- a. Click the Use URL Alias checkbox.
- **b.** Choose an existing URL alias or create a new one.
- c. Click Show Job Parameters under the Message textbox.
- d. Click Current Sheet Link.

The <<app_url>> appears in the message.

- 10. For Attach options, decide whether you want to embed the image in the email and select what format to use:
 - Embedded Image (default)
 - PNG
 - PDF
 - XLSX
 - CSV

11. On the Set Threshold tab, perform the following actions to create a threshold definition and a new table visual that specifies the trigger values.

Alternatively, instead of defining a new threshold, you can use an existing table visual to specify threshold values, and add the ID of that visual to the Visual ID field.



- **a.** Under Job Name, enter the name of the new trigger.
- **b.** Click Create Threshold.

This creates a new table visual based on all the fields of the dataset, and the visual opens in a new tab of your browser. Note that the ID for the new visual appears in the URL address, and has the following format: https://ip_address/arc/apps/builder/trigger_id

- 12. Make changes to the visual so that the field that contains the triggering measurements is the first field on the Measures shelf, and sort/filter results to ensure that the triggering measurement is in the first row.
- 13. Save the new table visual.

Back on the Email Visual/Email Dashboard modal, in the Set Threshold tab, you can see that the Visual ID field holds the ID of the new trigger table visual. In this example, it is 2148.

Cloudera Data Visualization Rerunning jobs

- **14.** Under Trigger, select one of the options:
 - Threshold met: triggers an email when the first measure of the first row in the trigger visual satisfies the conditional expression
 - Value changed since last assessment: triggers an email when the change in the first measure of the first row
 after the last assessment satisfies the conditional expression
- **15.** For the triggering Value, adjust the logical operand (one of <, >, #, or =) and the number.

In this example the expression # 1000 is used.

You can add multiple trigger conditions by clicking the + ADD CONDITION button.



Note: If you set multiple conditions, all of them need to be true to trigger the job.

16. For Assess Trigger, select an existing schedule interval:

- Hourly (default)
- Daily
- · Every Weekday
- Weekly
- Monthly
- Quarterly
- · or any existing custom schedule

You can also select Create New Schedule. This option is available to Admin users only.

17. The Send Email Limit gives you the option of sending only the first email in circumstances when a triggering event occurs multiple times within the specified time interval.

In this example, Once a day has been selected. This means that if the trigger satisfies the conditional expression, it may not be sent if an earlier one was sent in the preceding 24 hours.

The options are:

- When trigger occurs (which does not suppress any emails)
- Once a half hour (default)
- Once an hour
- · Once a day
- Once a week
- Every 2 weeks
- Once a month

18. Click SAVE.

The system notifies you that the trigger has been created successfully.

Related Information

Creating new email templates

Rerunning jobs

Cloudera Data Visualization allows you to rerun previously defined and performed jobs.

Procedure

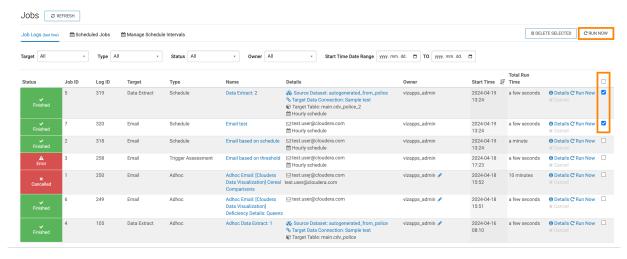
- 1. Navigate to Job Logs or Scheduled Jobs on the Jobs interface.
- 2. To rerun multiple jobs simultaneously, select them using the checkbox at the end of each row.

 Alternatively, you can use the checkbox located on the right side of the list header to select all jobs at once.

Cloudera Data Visualization Deleting job logs

3. Near the top of the page, click RUN NOW to initiate the rerun process.

If you wish to rerun a single job, you can click Run Now located at the end of the job row.



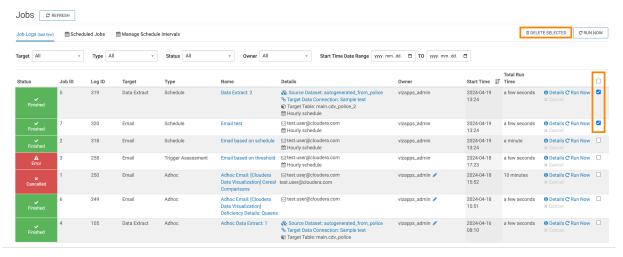
As the rerun process progresses, the job log list refreshes automatically to show the status information for the new instances of the selected jobs. These statuses may appear as Running or Pending. Pending jobs do not display Start Time or Total Run Time until they commence operation.

Deleting job logs

Cloudera Data Visualization allows you to remove unnecessary job logs from your log list.

Procedure

- 1. Navigate to the Job Logs tab within the Jobs interface.
- 2. Select the job logs you wish to delete. To select all logs, click the checkbox on the right side of the list header.
- 3. Near the top of the page, click DELETE SELECTED.



4. Click DELETE in the confirmation modal to proceed with the action.

The modal lists the IDs and names of the logs you selected for deletion.

Pausing and resuming jobs

Cloudera Data Visualization allows you to suspend and resume scheduled jobs providing flexibility in running your tasks.

Pausing running jobs

Procedure

- 1. Navigate to Scheduled Jobs on the Jobs interface.
- 2. Locate the job you wish to pause and click the corresponding Pause option at the end of the row.

A notification that the job is paused appears briefly, the status of the job changes to paused, and the Pause option is replaced with Resume.

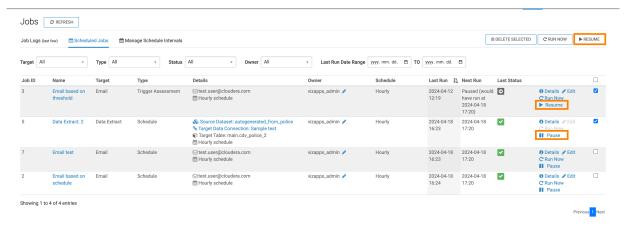
Resuming paused jobs

Procedure

- 1. Navigate to Scheduled Jobs on the Jobs interface.
- 2. Locate the job you wish to pause and click the corresponding Resume option at the end of the row.

A notification that the job is resumed appears briefly, the status of the job changes to resumed, and the Resume option is replaced with Pause.

To resume multiple jobs, select the corresponding checkboxes and click RESUME at the top of the interface. If you want to resume all jobs, click the checkbox on the right side of the list header first.



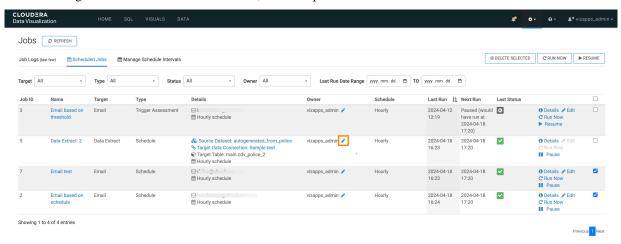
Changing the owner of a job

Cloudera Data Visualization allows existing job owners and system administrators to change the owner of an existing job. This can be helpful when jobs from deleted users have unassigned owners, and are not be able to run until the owner is changed.

Cloudera Data Visualization Editing scheduled jobs

Procedure

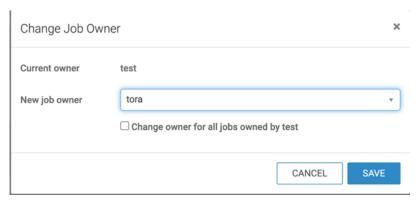
1. In the Job Logs or the Scheduled Jobs interface, click the pencil icon next to the owner's name.



The Change Job Owner modal window appears.

2. Select a name for the New job owner from the list of available users.

You can also mark the checkbox to apply the change to all jobs owned by the current owner.



3. Click SAVE.

Editing scheduled jobs

Cloudera Data Visualization allows you to update existing scheduled jobs.

Cloudera Data Visualization Editing scheduled jobs

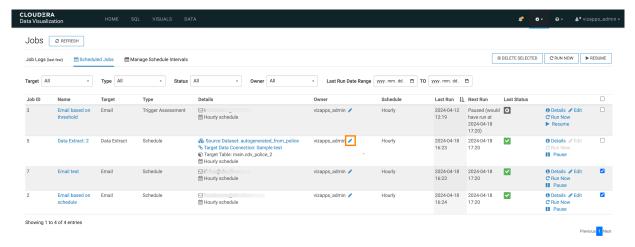
Procedure

1. In the Scheduled Jobs interface, select the job and click Edit at the end of the row.



Note:

The Edit action is not available for data extract jobs. For more information on changing data extract details, see *Editing a data extract*.



The Email Visual modal window appears allowing you to make necessary adjustments.

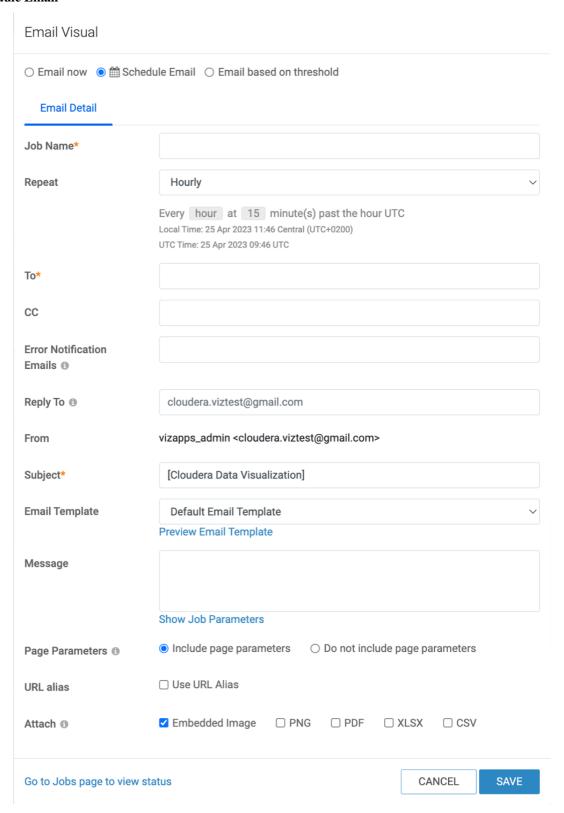


Note: The job type and attachment type cannot be changed, and only specific fields are editable.

Cloudera Data Visualization Editing scheduled jobs

2. Modify the required fields according to your needs.

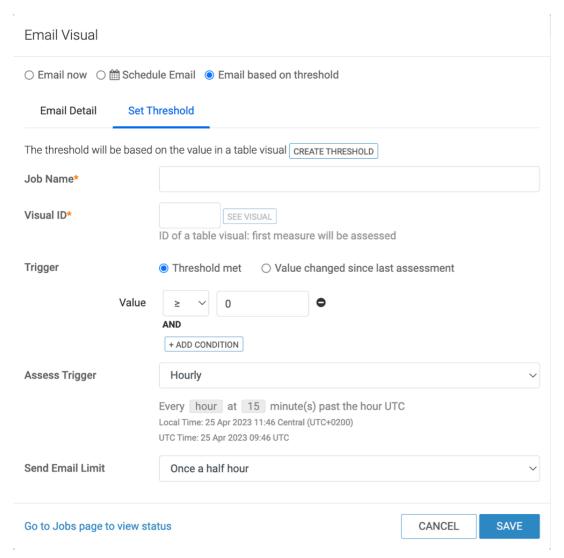
Schedule Email



Emails based on threshold

For emails based on thresholds, all fields on the Email Detail and Set Threshold tabs are editable.

Cloudera Data Visualization Deleting scheduled jobs



3. Once you have finalized the updates, click SAVE to apply the modifications.

Related Information

Editing a data extract

Deleting scheduled jobs

Cloudera Data Visualization allows you to delete existing scheduled jobs that you do not need any more.

About this task



Important:

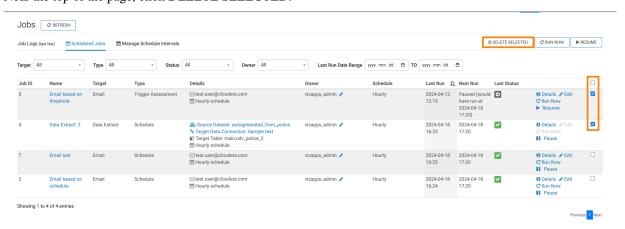
Deleting a scheduled job will delete the job itself along with all associated job logs.

Procedure

- 1. Navigate to the Scheduled Jobs tab within the Jobs interface.
- 2. Select the jobs you wish to delete. To select all jobs, click the checkbox on the right side of the list header.

Cloudera Data Visualization Creating new schedules

3. Near the top of the page, click DELETE SELECTED.



4. Click DELETE in the confirmation modal to proceed with the action.
The modal lists the IDs and names of the scheduled jobs you selected for deletion.

Creating new schedules

Cloudera Data Visualization allows you to create custom schedules for your scheduled jobs.

About this task



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

To create a new schedule that can be used by one or more scheduled jobs, follow the below steps.

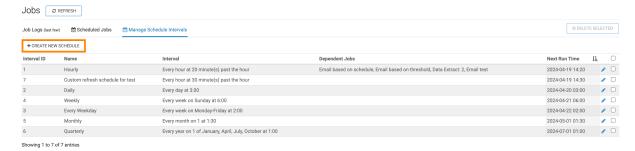
Additionally, you can also create custom schedule intervals when configuring new scheduled emails. These intervals are accessible on the Manage Schedule Intervals page, and can be reused for other jobs as well.

Procedure

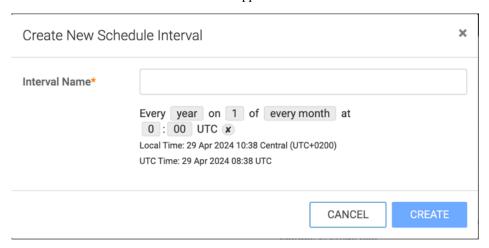
1. Navigate to the Manage Schedule Intervals tab within the Jobs interface.

Cloudera Data Visualization Editing schedule intervals

2. Click CREATE NEW SCHEDULE.



The Create New Schedule Interval modal appears.



- **3.** Specify the parameters of the schedule:
 - In the Interval Name field, provide a descriptive name for the new schedule interval.
 - When selecting the date/time of the run, remember that the time format is in UTC. Local time format designation is provided for reference.
 - Choose the largest time component in the first selectable field (defaulted to year).
 - For the day of the month, select one or multiple days as needed.
 - Set the hour and minute components of the schedule in the third field, with multiple selections possible based on previous choices.



Note: The number of selections depends on the granularity of the time interval specified by the first choice.

4. Click CREATE to save the new schedule.

A brief success message appears on your screen, confirming the creation of the new interval. The newly created interval is now visible in the Manage Schedule Intervals interface for future use.

Editing schedule intervals

Cloudera Data Visualization allows you to adjust the schedule intervals that you previously defined for your scheduled jobs.

About this task

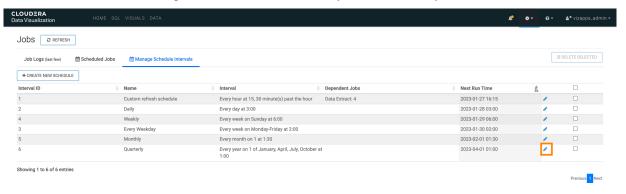


Note: This feature is only available to users with administrative privileges.

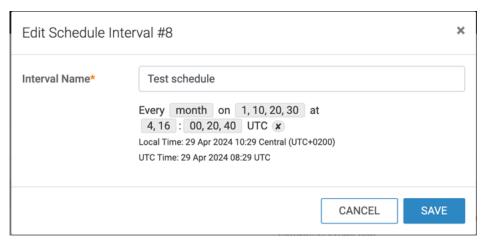
Cloudera Data Visualization Editing schedule intervals

Procedure

- 1. Navigate to the Manage Schedule Intervals tab within the Jobs interface.
- 2. Click the Pencil icon that corresponds to the schedule interval you wish to modify.

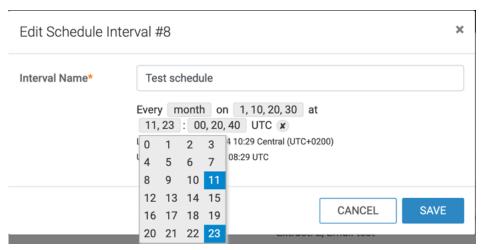


The Edit Schedule Interval modal appears.



3. Adjust the time selection according to your needs.

In the example provided, the time selection is adjusted to account for the 7-hour difference between UTC and local time (PDT). To achieve the intended notification times of 04:00 and 16:00 local time (PDT), adjust the hour parameter from 4 and 16 to 11 and 23, respectively.



4. Click SAVE to apply the modifications.

Cloudera Data Visualization Deleting schedule intervals

Deleting schedule intervals

Cloudera Data Visualization allows you to delete previously defined schedule intervals that are no longer needed.

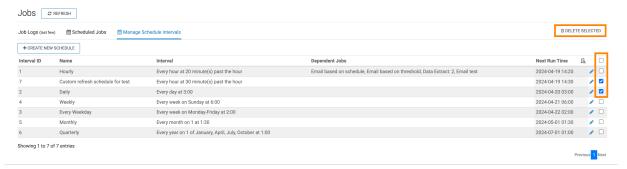
About this task



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

Procedure

- 1. Navigate to the Manage Schedule Intervals tab within the Jobs interface.
- 2. Select the intervals you wish to delete. To select all intervals, use the checkbox on the right side of the list header.
- 3. Near the top of the page, click DELETE SELECTED.



4. Click DELETE in the confirmation modal to proceed with the action. The modal lists the IDs and names of the intervals you selected for deletion.