Cloudera Data Visualization 7.2.3

Sheets

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CLOUDERA

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Contents

Creating a new sheet

Cloudera Data Visualization enables you to create and customize sheets within your dashboards.

Procedure

1. Open a dashboard of your choice in Edit mode.

   If you are creating a new dashboard, the default single sheet already contains a basic table visual based on the initial dataset.

   Note: Save the dashboard before proceed with adding a new sheet.

2. Navigate to the bottom left corner of the interface and click the ➕ icon next to the tab of the existing sheet.
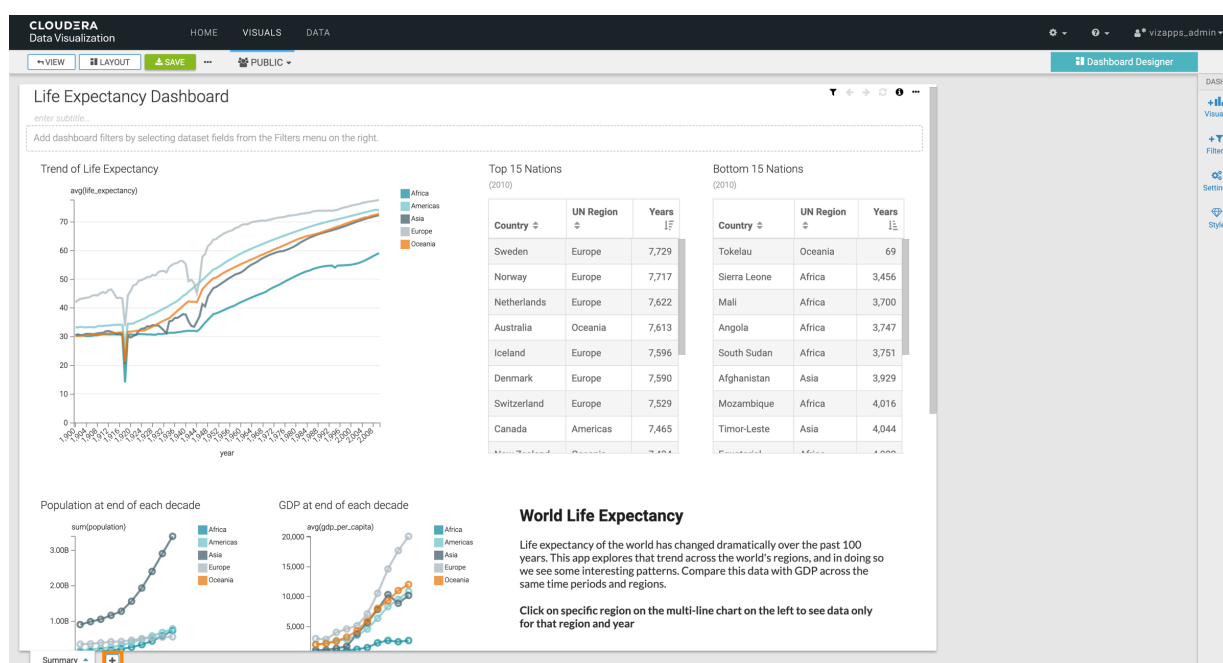
   Cloudera Data Visualization generates a new, empty sheet, titled Sheet 2. The sheet title is automatically highlighted, allowing you to assign a more descriptive name.

3. Change the name of the sheet. In this example, Sheet 2 is renamed to High GDP.
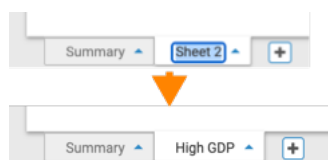
4. Click SAVE to ensure that all changes are saved to the dashboard.

What to do next

Start building out the new sheet by adding filters and visuals.

Adding visuals to a sheet

Cloudera Data Visualization enables you to add visuals to a sheet.

Procedure

1. Open a dashboard of your choice in Edit mode.

2. Choose the specific sheet in the dashboard where you want to add visuals.

> **Note:** If you are working with a new dashboard, it has a single sheet by default.

This examples works with a sheet called High GDP.

3. In the Visual Builder side menu bar on the right, select Visuals.
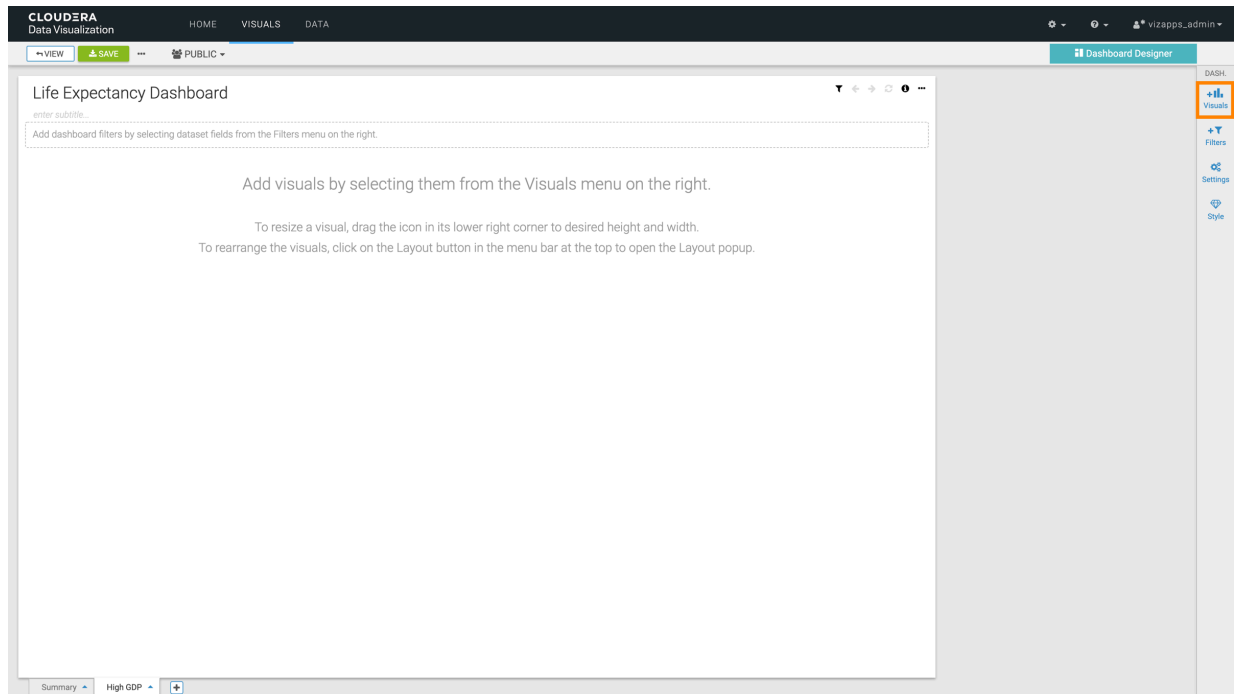
4. In the Visuals menu, configure the visual settings as needed.

You can set the following:

a. *Recently Viewed Visuals*

You can quickly access visuals added recently. Click one of the options in the top menu to add a visual to the dashboard sheet.

b. *Connection*

Change the data connection to access visuals based on different connections and datasets. The Connection dropdown lets you select an alternate connection, affecting the dataset and updating the visuals list. It is available in both the Visuals and Filters menus.

Click the name of the current connection, and select a different connection from the menu. When you change the connection, it changes the dataset to the first one that is available on that connection. This also updates the list of visuals that appear in the lower portion of the menu.

> **Note:** A dashboard can contain visuals from several connections.

   c. *Dataset*

Choose a different dataset within the same or different connections. Changing the dataset updates the list of visuals available for addition to the dashboard sheet. This option is available in both Visuals and Filters menus.

Click the name of the current dataset, and select a different dataset from the menu. When you change the dataset, a new set of existing visuals appears in the menu. You can change the source dataset of the visuals that you plan to add to your dashboard sheet. The new dataset may be on the same connection, or on a different connection.

> **Note:** A dashboard can contain visuals from multiple datasets that share the same connection or from different datasets across different connections.

   d. *New Visual*

Start a new visual within the dashboard, creating a table visual based on the chosen dataset. You can open this visual in edit mode and make changes by selecting another option from the Visual Catalog, populating the shelves of the visual, and customizing settings, colors, and more.

   e. *Linked Visual*

Reuse an existing visual marked as linked. Choose to clone the visual or maintain a link for synchronized changes across dashboards.

     1. Click to select a visual that is marked with the (linked) symbol.

       Data Visualization opens an Add Linked Visual modal window.

     2. Choose one of the following options:

       • Clone visual option, the default, makes a copy of the linked visual. This new visual can be subsequently changed without affecting the original visual.
       • Maintain link option keeps the association; any changes made to the visual in one dashboard appear in all dashboards that feature this same visual.

     3. After making your choice, click ADD VISUAL.

   f. *Existing Visual*

Access visuals belonging to the specified dataset. You can click visuals to add them to the dashboard sheet. To add a visual that already exists in this dashboard and appears on another sheet, click the icon that represents this visual.

5. Click SAVE to save all changes to the sheet.

What to do next

To further enhance the dashboard sheet, consider adding filters. For instructions, see *Adding filters to a sheet*.

Adding a filter to a sheet

Cloudera Data Visualization enables you to add filters to a sheet.

## Procedure

1. Open a dashboard of your choice in Edit mode.
2. Choose a sheet in the dashboard where you plan to add visuals.

   In this example, a sheet called High GDP is used.
3. Select Filters in the Dashboard Designer side menu bar on the right.
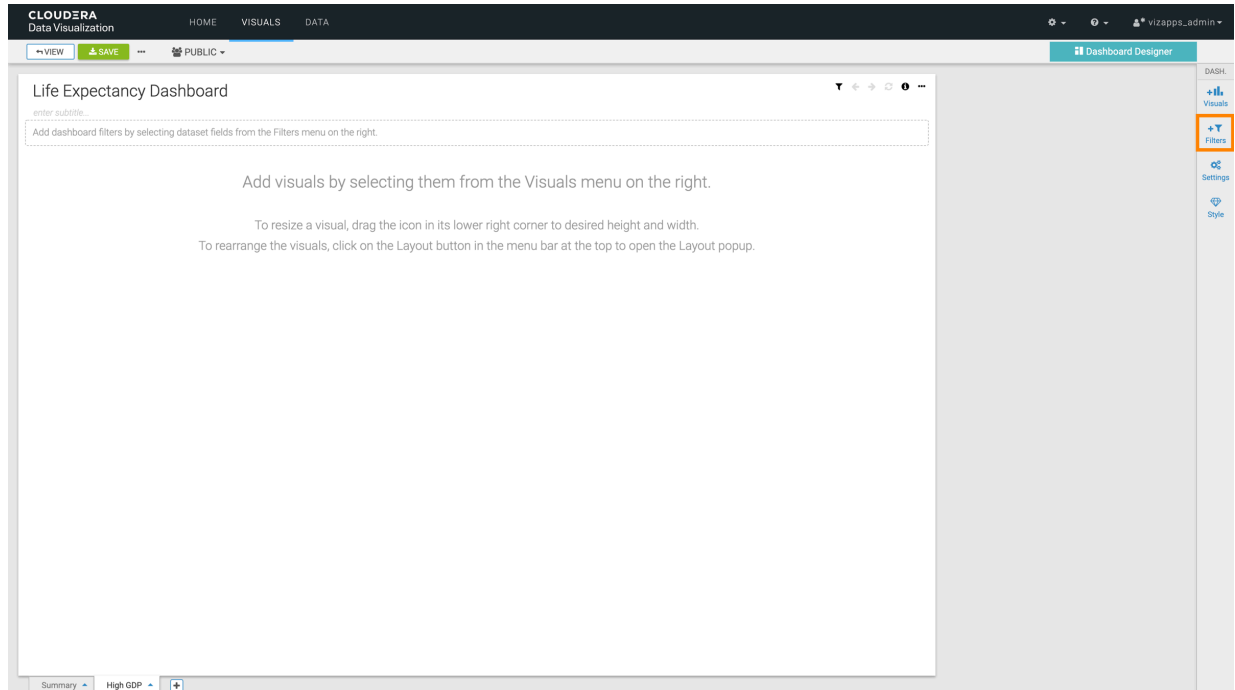
4. In the ADD FILTERS menu, configure your filter as you need.

You can set the following options:

a. *Custom Filter*

Click CREATE CUSTOM FILTER at the top of the Filters menu.

Data Visualization adds a new filter to the filter area of the sheet. If you click the gear icon on the filer, the Settings window modal is displayed, where you can name the new filter and specify its value options, data handling, display, scope, and custom styling.

For information on new dashboard-specific filter scope options, see *Configuring scope of dashboard filters*.

b. *Connection*

Data Visualization supports access to multiple data sources in the same dashboard, so you can change the connection to access visuals based on different connections and dataset.

Click the name of the current connection, and select a different connection from the menu. When you change the connection, note that it changes the dataset to the first one that is available on that connection. This also updates the list of visuals that appear on the lower portion of the menu.

c. *Dataset*

You can change the source dataset of the visuals that you plan to add to your dashboard sheet. The new dataset may be on the same connection, or on a different connection.

Click the name of the current dataset, and select a different dataset from the menu. This also updates the list of visuals that appear on the lower portion of the menu.

d. *Search*

For datasets built on very wide tables, this option helps you find the base field for your filter.
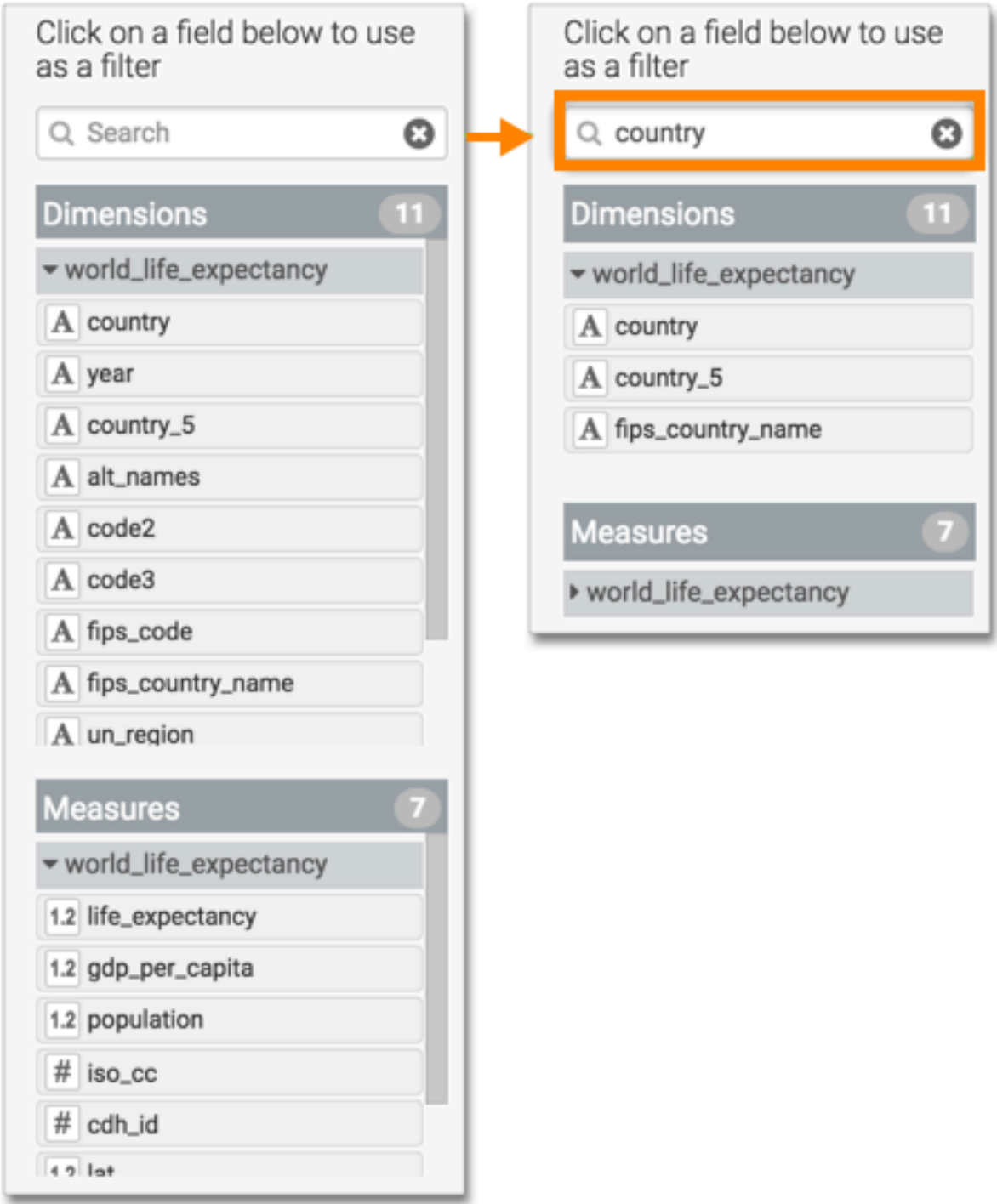
e. *Field Filter*

Clicking one of the fields in either Dimensions or Measures adds a basic filter based on that field into the filter area of the interface. Alternatively, you can also drag the field that you want to use as a filter and drop it into the filter bar on the sheet.

In this example, the filter country has been added. You can use it directly, or open the Settings menu, where you can rename the filter and specify its value options, data handling, display, scope, and custom styling.

f. *Field Groups*

For ease of viewing, you can collapse or expand the list of fields in either Dimensions, Measures, or both.

Additionally, datasets that represent two or more joined tables group the fields of each table separately. Clicking the name of the table under Dimensions or Measures toggles between expanding the list of these fields.

Renaming a sheet

Cloudera Data Visualization enables you to rename sheets to provide context and make it easier to identify the content of each sheet within the dashboard.

Procedure

1. Open a dashboard of your choice in Edit mode.

   By default, each dashboard contains a single sheet, named Sheet 1.

2. At the bottom left corner of the interface, click the ▲ icon next to the name of the sheet.

3. In the sheet management menu, click Rename.
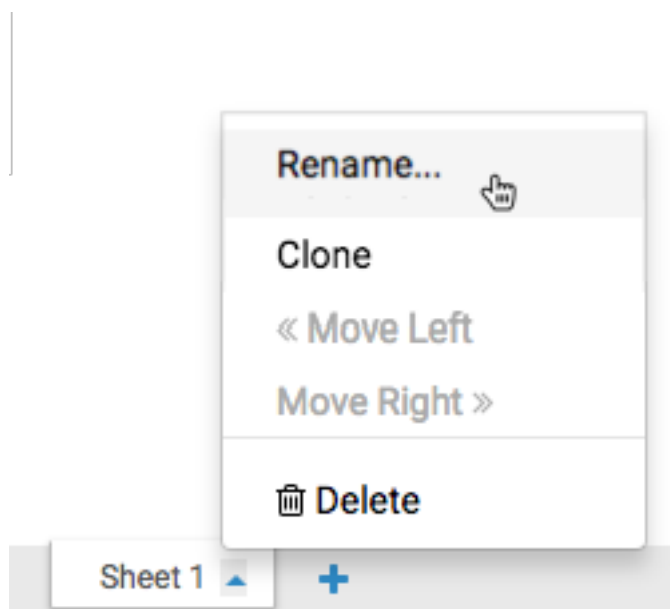
   The sheet title becomes editable.

4. Type the new name and either press enter/return on the keyboard, or click outside the sheet name space.

   In this example, the name of the sheet changes from Sheet 1 to High GDP.

5. Click SAVE to save all changes to the dashboard.

   Alternatively, you can double-click the name of the sheet to change it in Edit mode.

   To preview the changes at runtime, click VEW.

Reordering sheets

Cloudera Data Visualization enables you to move and reorder sheets within a dashboard.
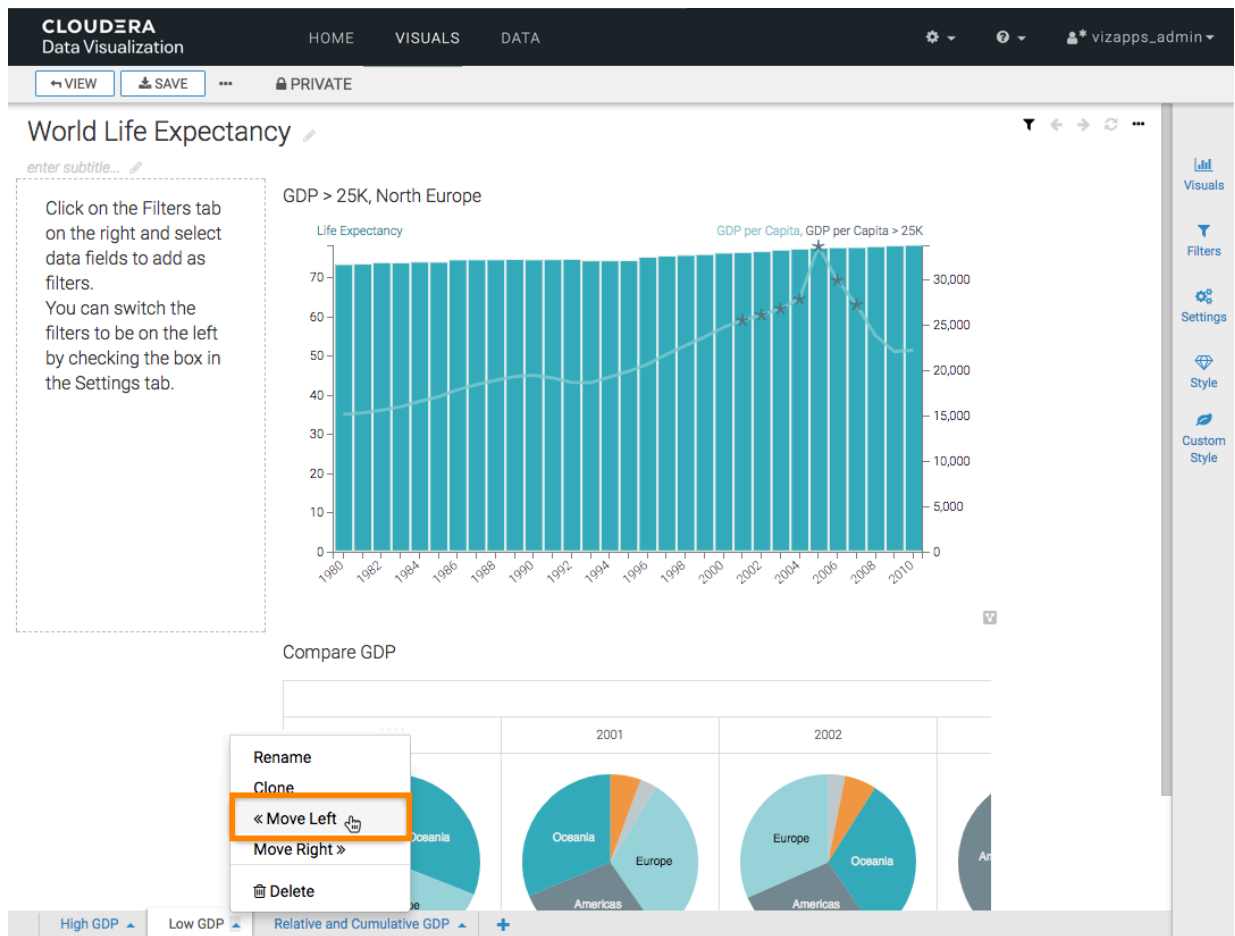
Procedure

1. Open the dashboard in Edit mode.
2. Select the sheet you want to move by clicking on its tab, at the bottom left corner of the interface.

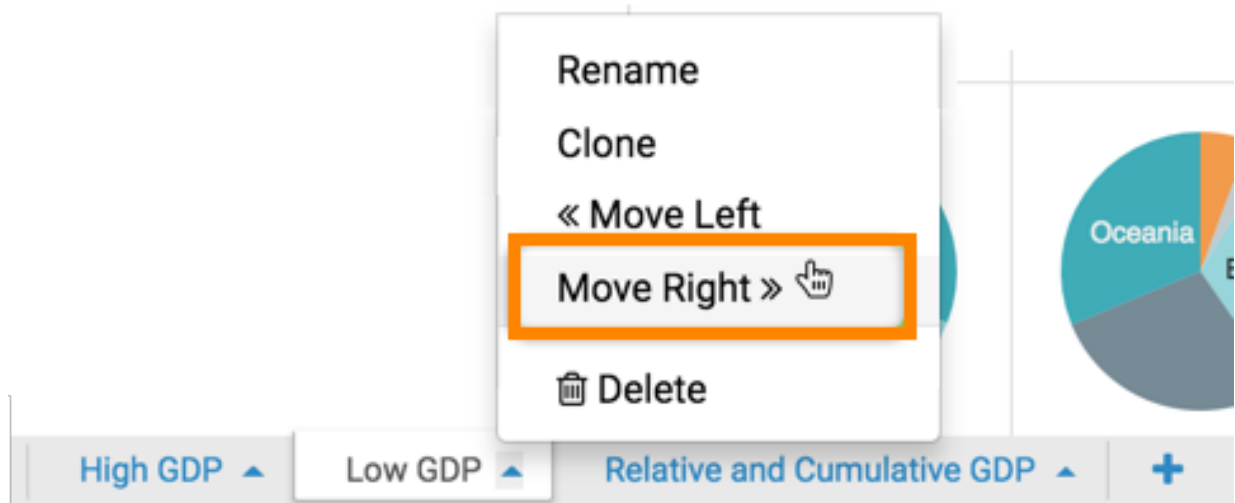   In this example, the sheet Low GDP is chosen, the second of three sheets of the dashboard.
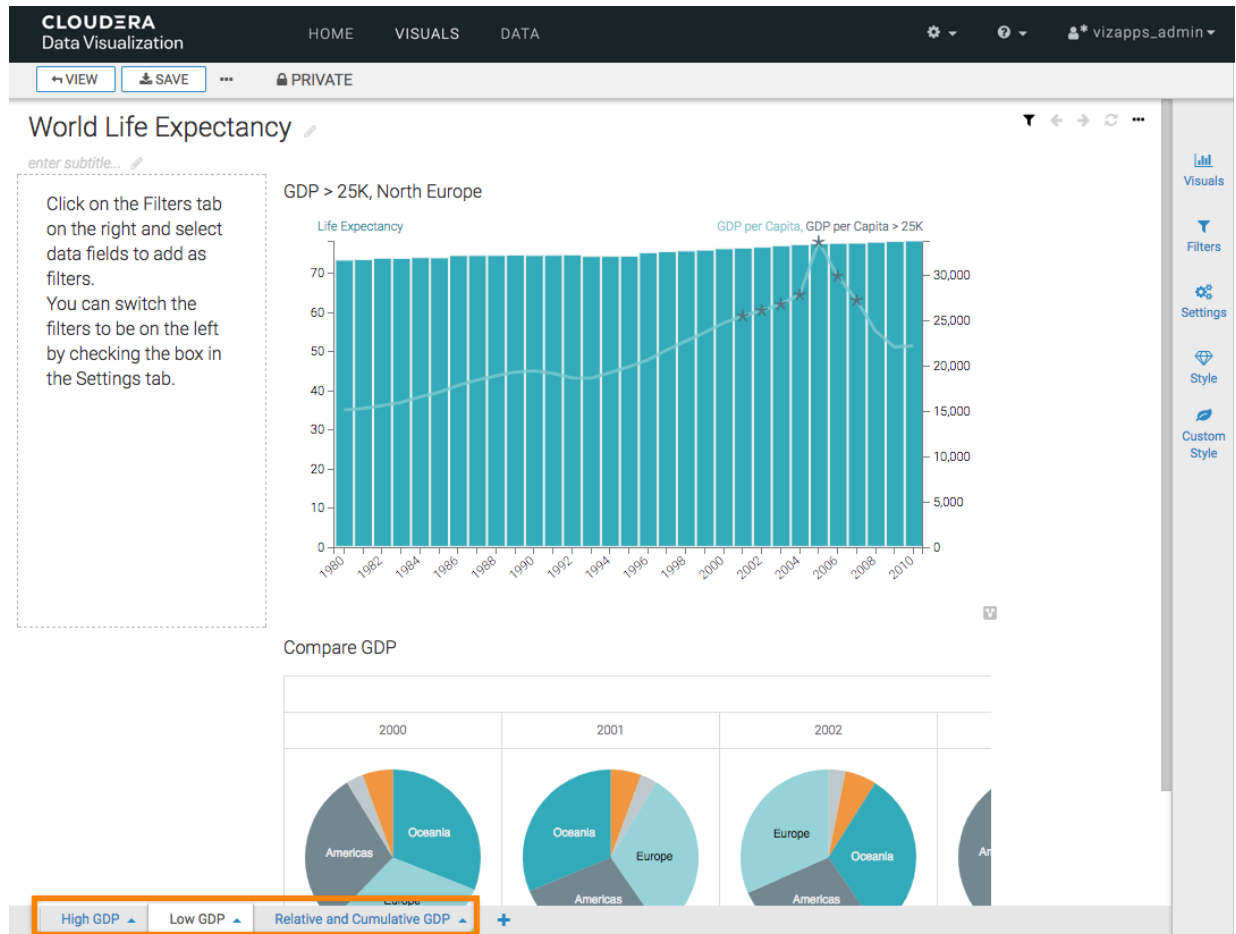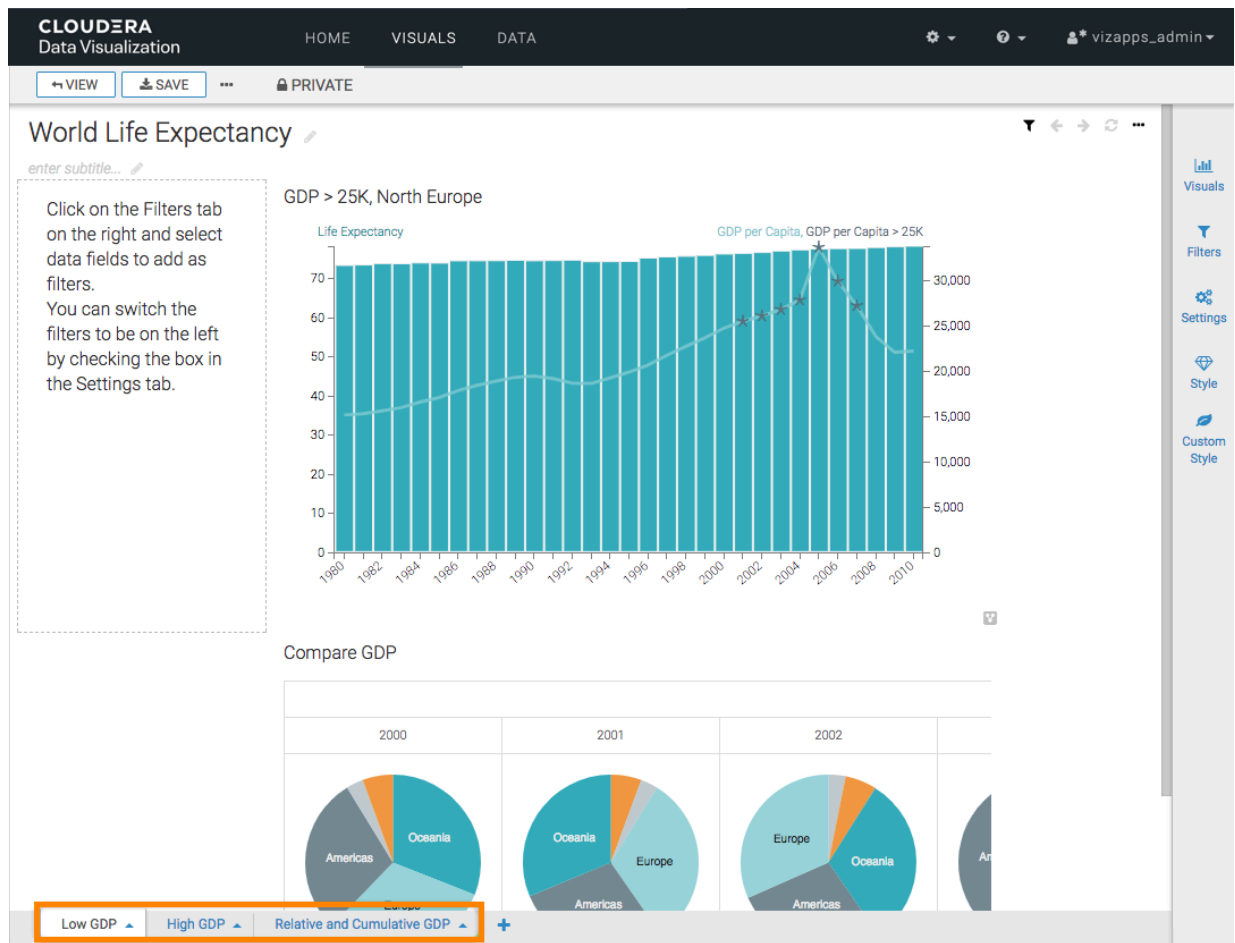
3. To move a sheet to the left, click the (up arrow) icon next to the title of the sheet, and choose the Move Left
option.

Similarly, if you wanted to move the sheet to the right instead, choose the Move Right option.

The dashboard moves to the extreme left, or the first sheet in the dashboard.

4. Click SAVE to save all changes to the dashboard.

5. To see how the dashboard appears at runtime and to confirm that the order of sheets is correct, click VIEW.

In this example, the order of sheets in the dashboard is just like intended.
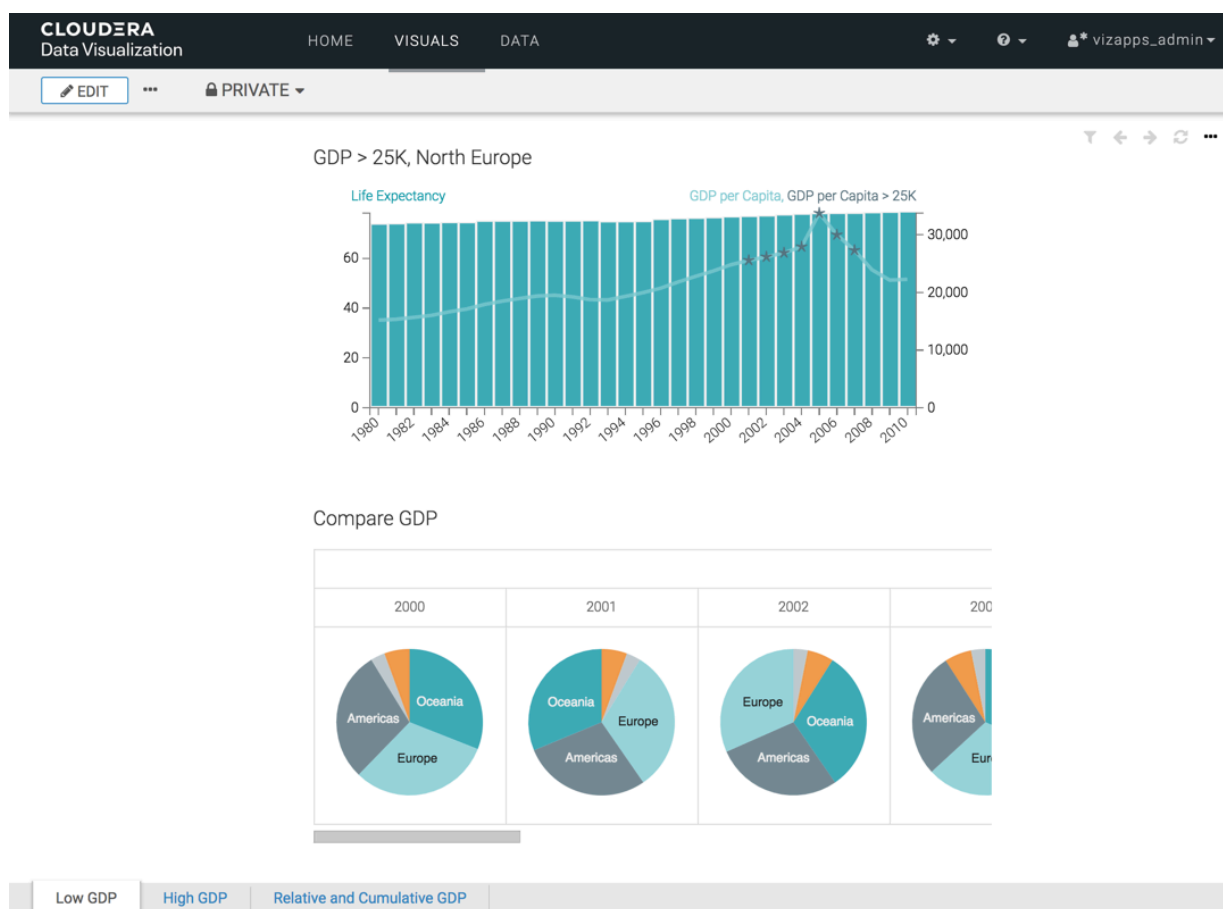
Reordering sheet IDs to match positions

Cloudera Data Visualization allows you to reassign the sheet IDs based on their new order within the dashboard after reordering or deleting sheets. This ensures consistency between sheet IDs and the display order of the actual sheets.

About this task

In addition to their names, each sheet in the dashboard has a unique identifier, which is visible in the sheet's URL. This unique ID helps you to easily differentiate between various sheets within the dashboard.

The IDs are assigned based on the original order of the sheets. When sheets are repositioned or removed, the ID sequence can lose alignment with the current sheet order. To maintain a coherent reference system, you can reassign sheet IDs based on their new order.

Procedure

1. Open the dashboard in Edit mode.

2.

Hover over the icon at the bottom left corner of the Dashboard Designer interface and click the icon that appears next to it.
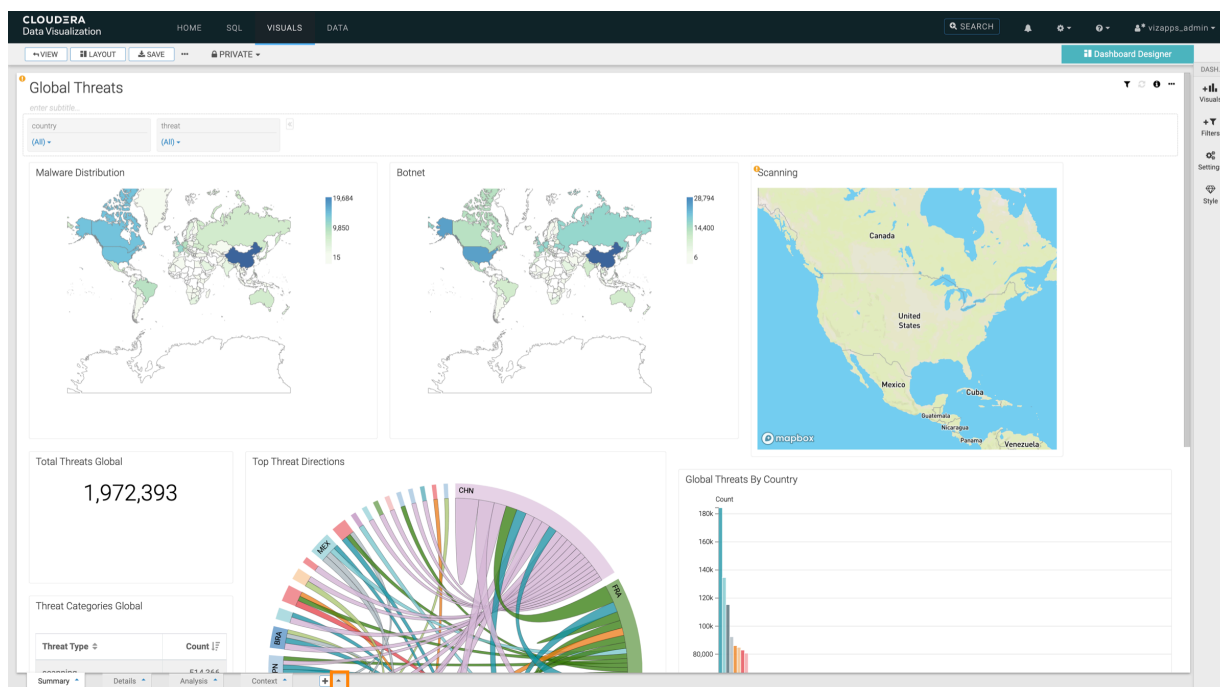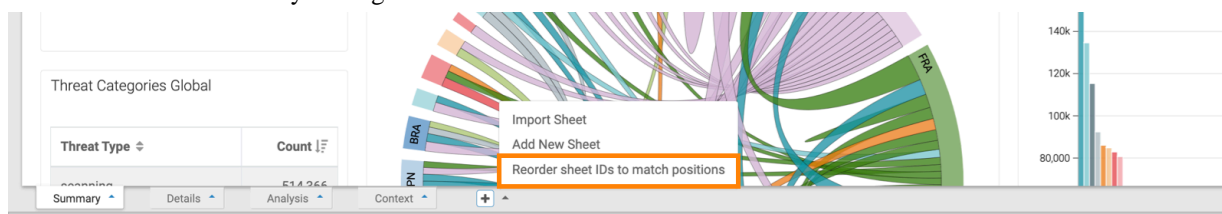

3. Select Reorder sheet IDs to match positions from the pop-up menu.

Sheet IDs are automatically reassigned based on the new order of sheets.

4. Click SAVE to save all changes to the dashboard.

Results

The new sheet ID numbering now corresponds to the order of the sheets on the dashboard.

Cloning a sheet

Cloudera Data Visualization enables you to clone a sheet in a dashboard.

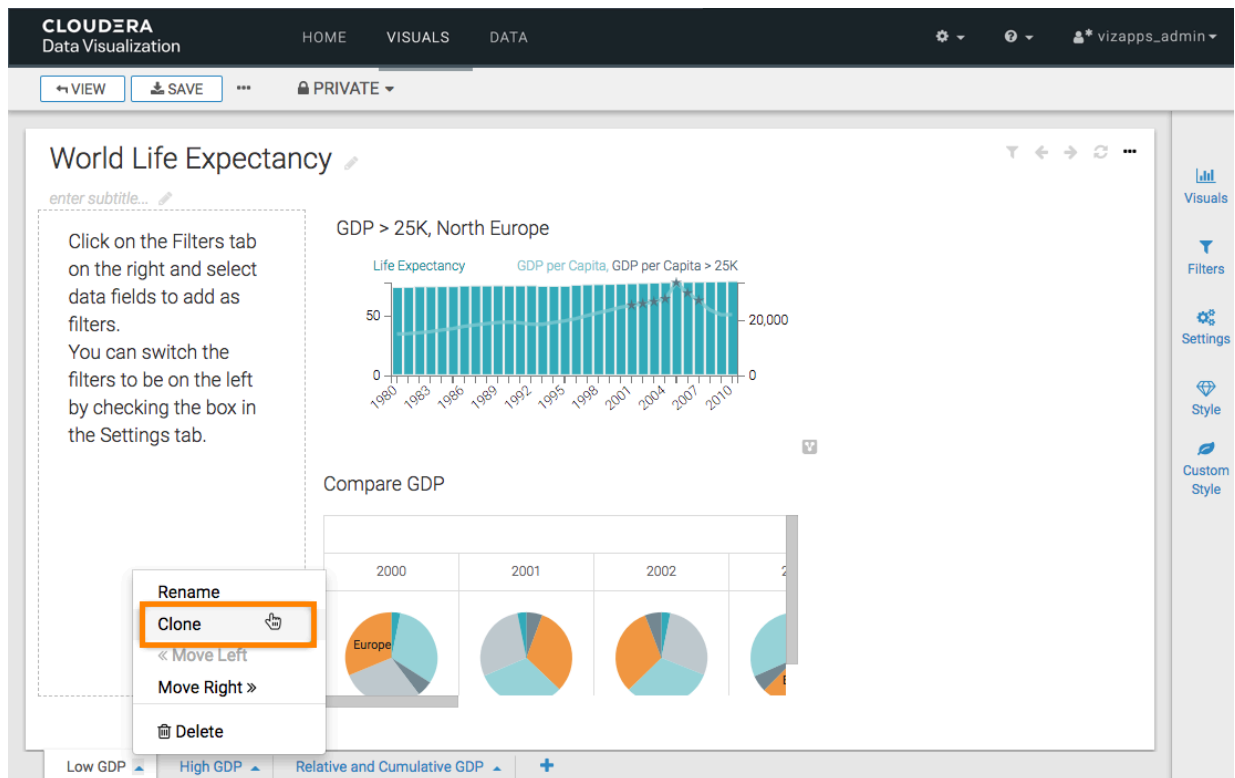You can clone internal and external sheets.

Cloning an internal sheet in a dashboard

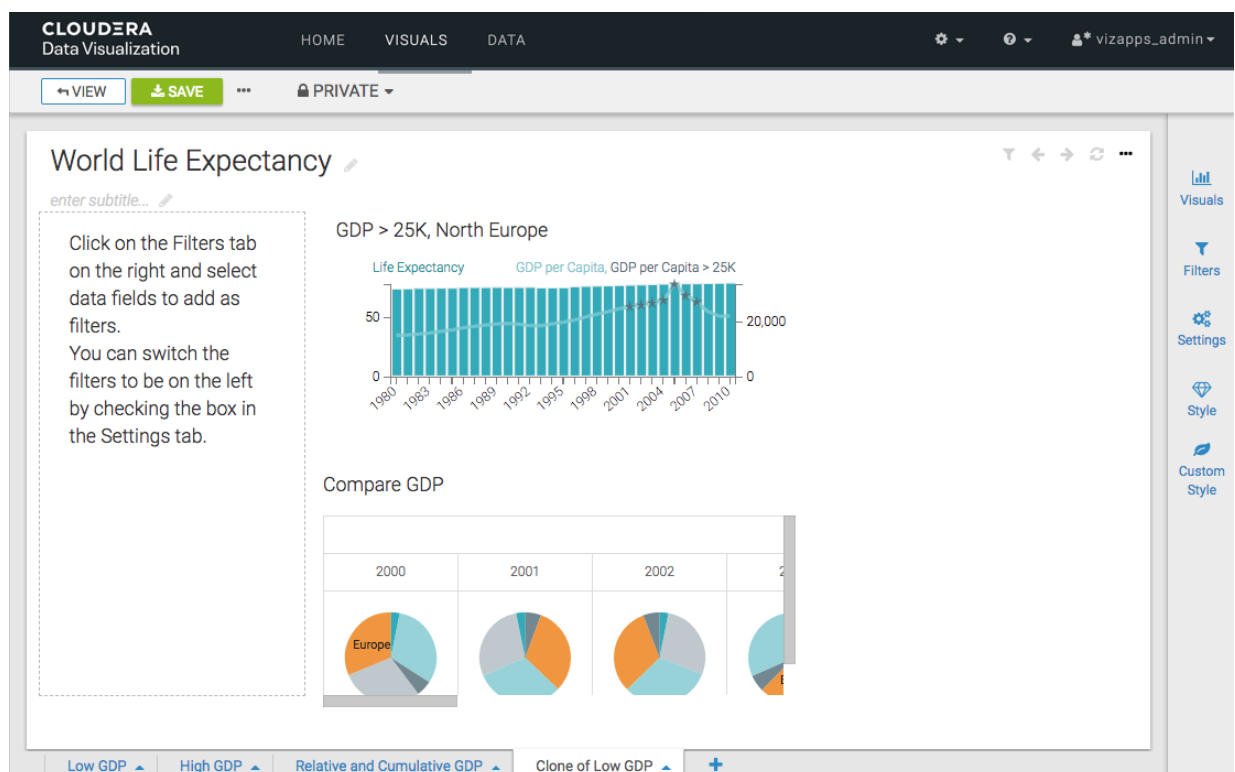In Cloudera Data Visualization, you can clone sheets within a dashboard.

Procedure

1. Open the dashboard in Edit mode.

2. Select the sheet you want to clone by clicking on its tab, at the bottom left corner of the interface.

In this example, the sheet Low GDP is chosen.

3. Click the (up arrow) icon next to the title of the sheet, and choose the Clone option.

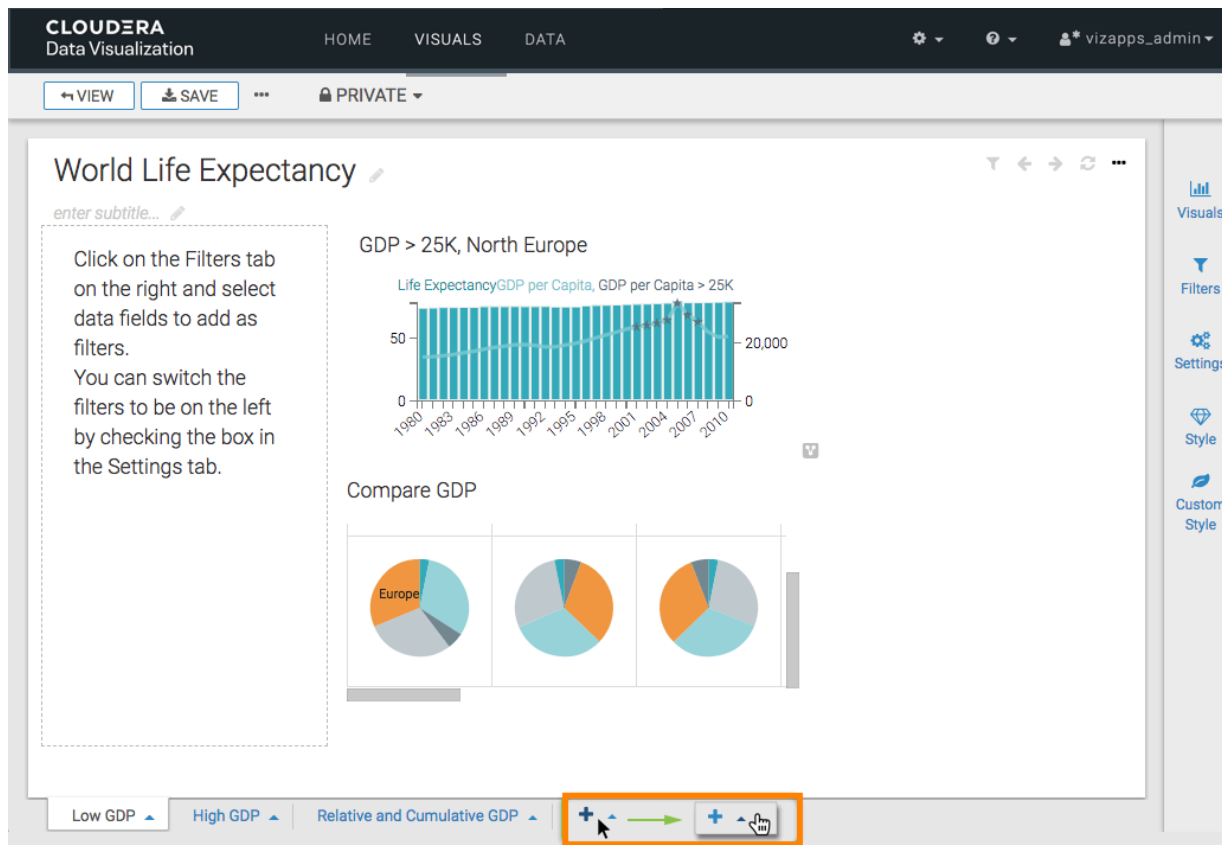Data Vizualization creates a clone of the sheet, and places it on the extreme right.

4. Rename the sheet, and click SAVE to save the all changes to the dashboard.

Cloning an external sheet in a dashboard

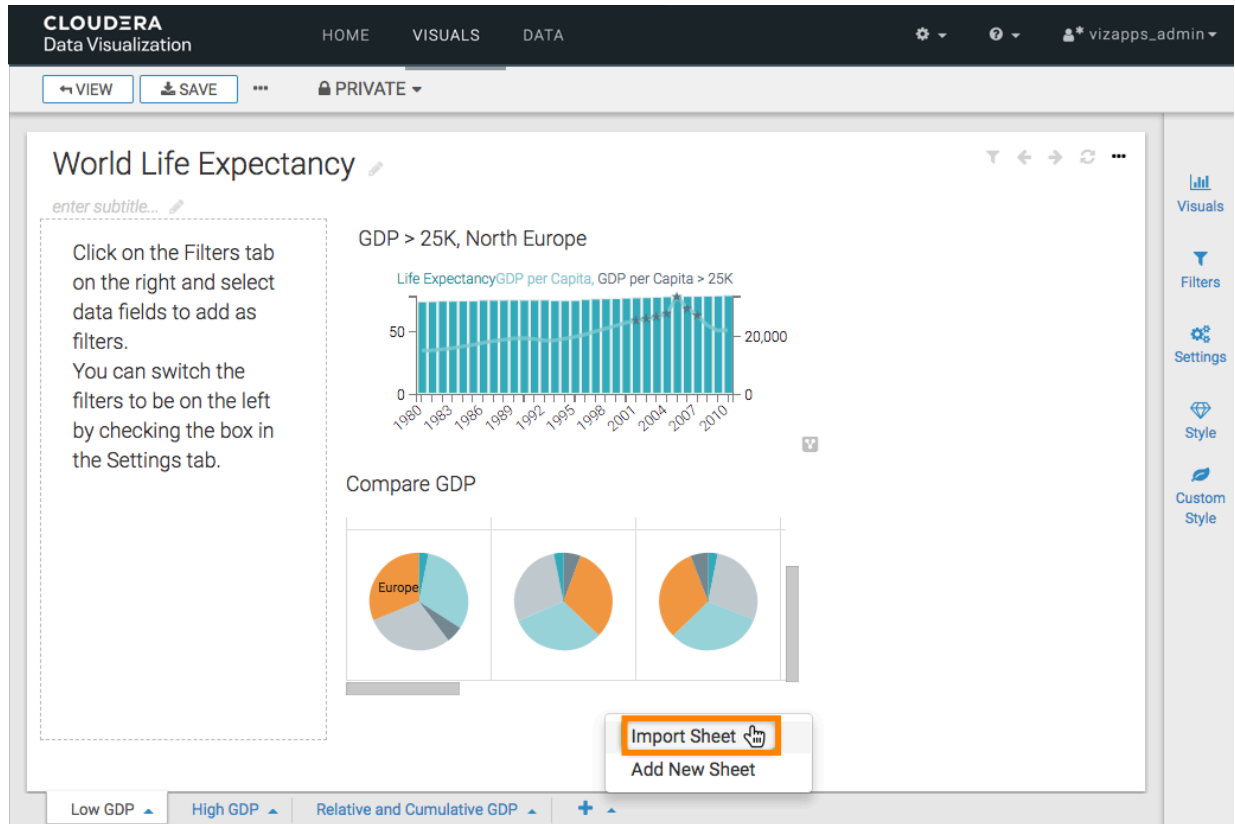In Cloudera Data Visualization, you can clone a sheet from another dashboard, and import it into your current dashboard.

Procedure

1. Open the dashboard in Edit mode.
2. At the bottom of the interface, hover over the (plus) icon next to the right-most sheet title.

   A new widget, the (up) icon, appears to the right of the (plus) icon.
3. Click the (up) icon.

4. In the menu, select Import Sheet.
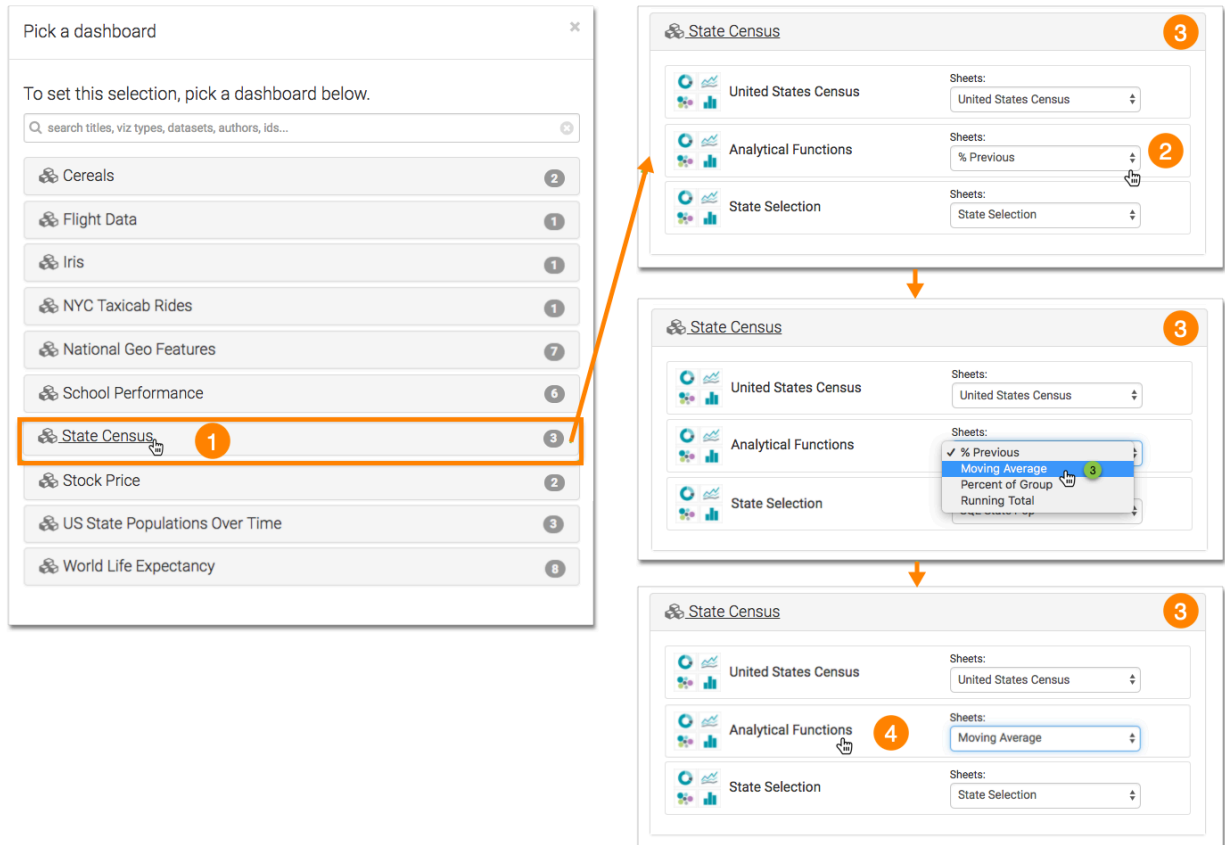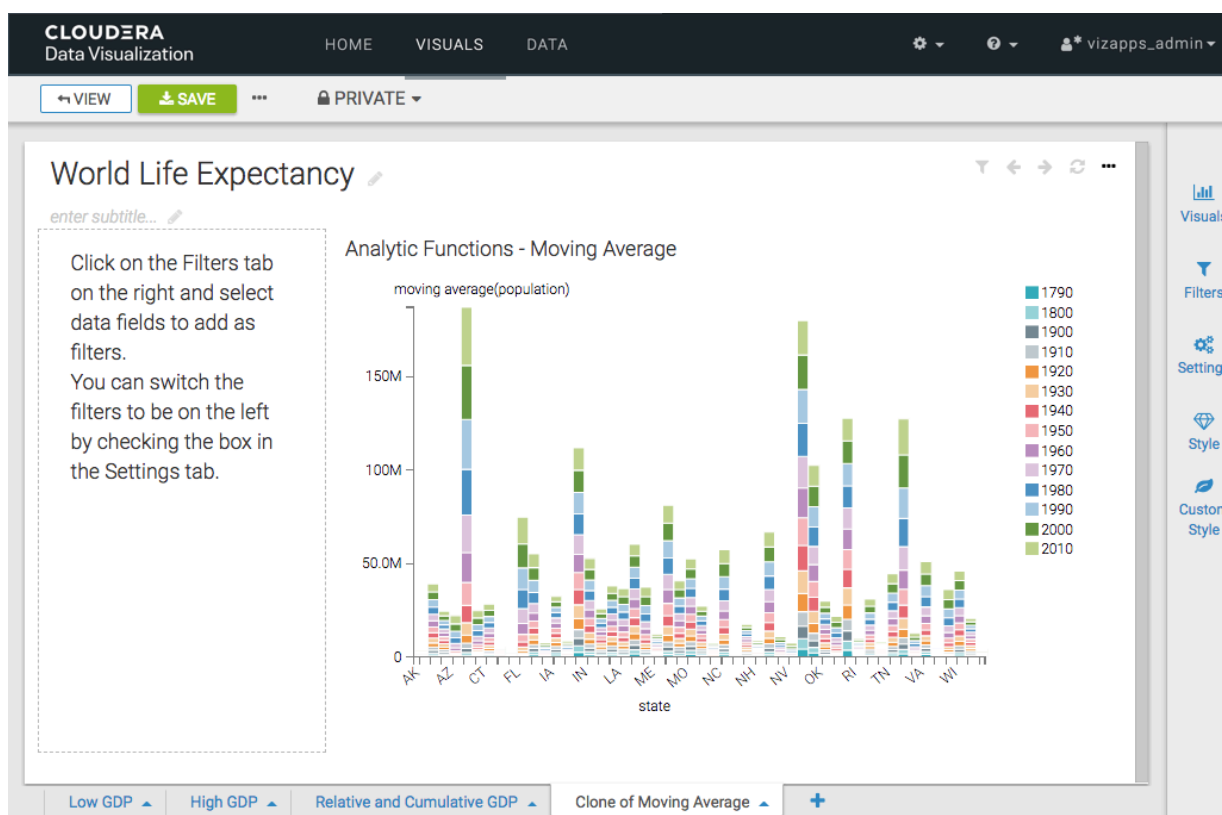
5. In the Pick a dashboard modal window, make the selection in the following manner:

    a. Select the dataset.

    b. Select the dashboard.

    c. Select the particular sheet that you plan to import.

    d. Click the dashboard.

Data Visualization creates a clone of the external sheet, and imports it into the dashboard, placing it on the extreme right.

6. Rename the sheet and click SAVE to save the all changes to the dashboard.

Downloading a sheet

Cloudera Data Visualization enables you save the current sheet of a dashboard as a .png file and to download the entire dashboard as a PDF file with each sheet on a separate page.

Downloading dashboard sheets as PNG files

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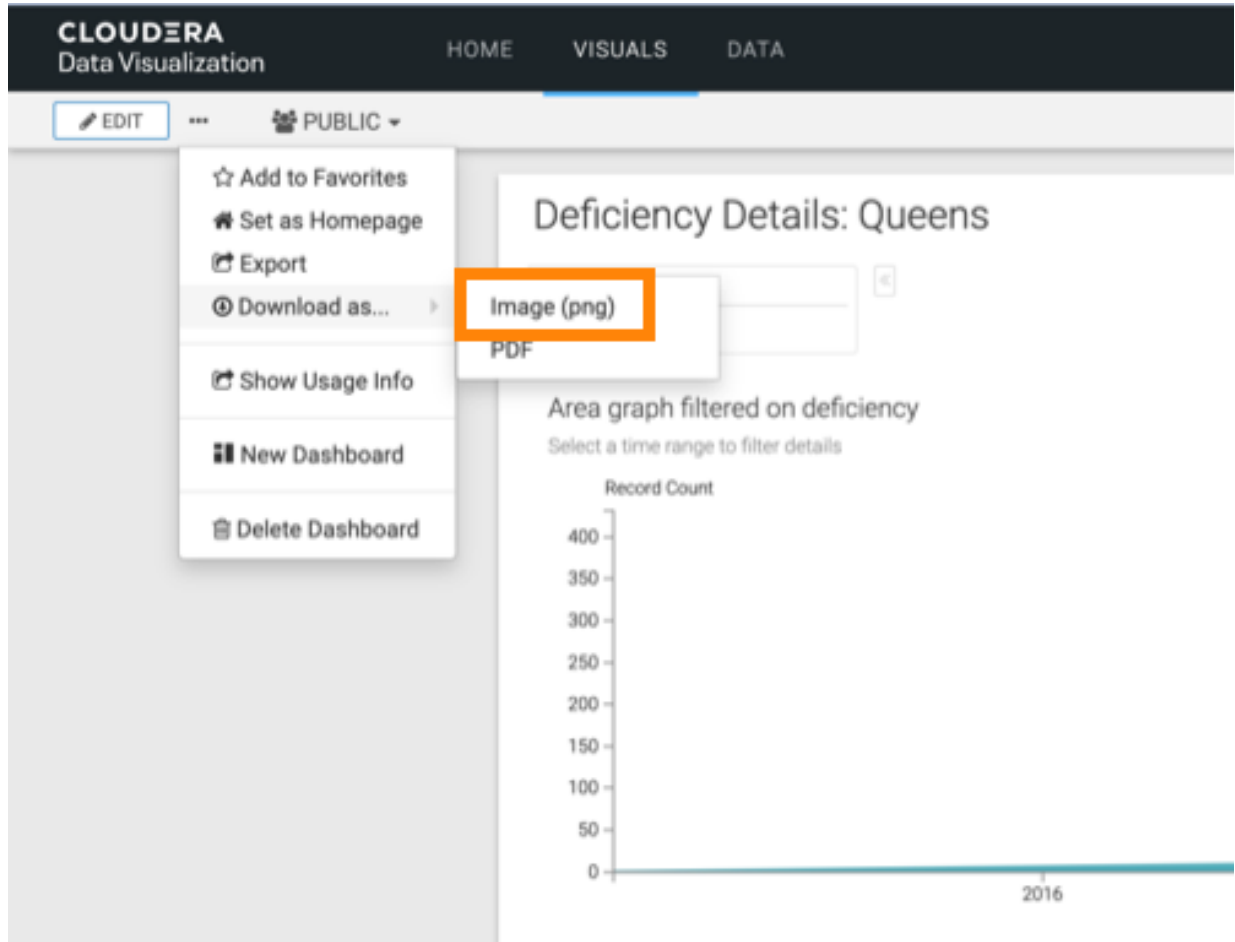
> **Note:**
> - This feature is available only when thumbnails are enabled.
> - For snapshots of custom JS visuals, CDV supports only ECMA Script 5 for Javascript.
> - CDV does not support PNG download on the Windows platform.

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 issue_xxxxxxxxxxxxxx.pdf, replacing the forward-slash (ASCII #47) character with a space.
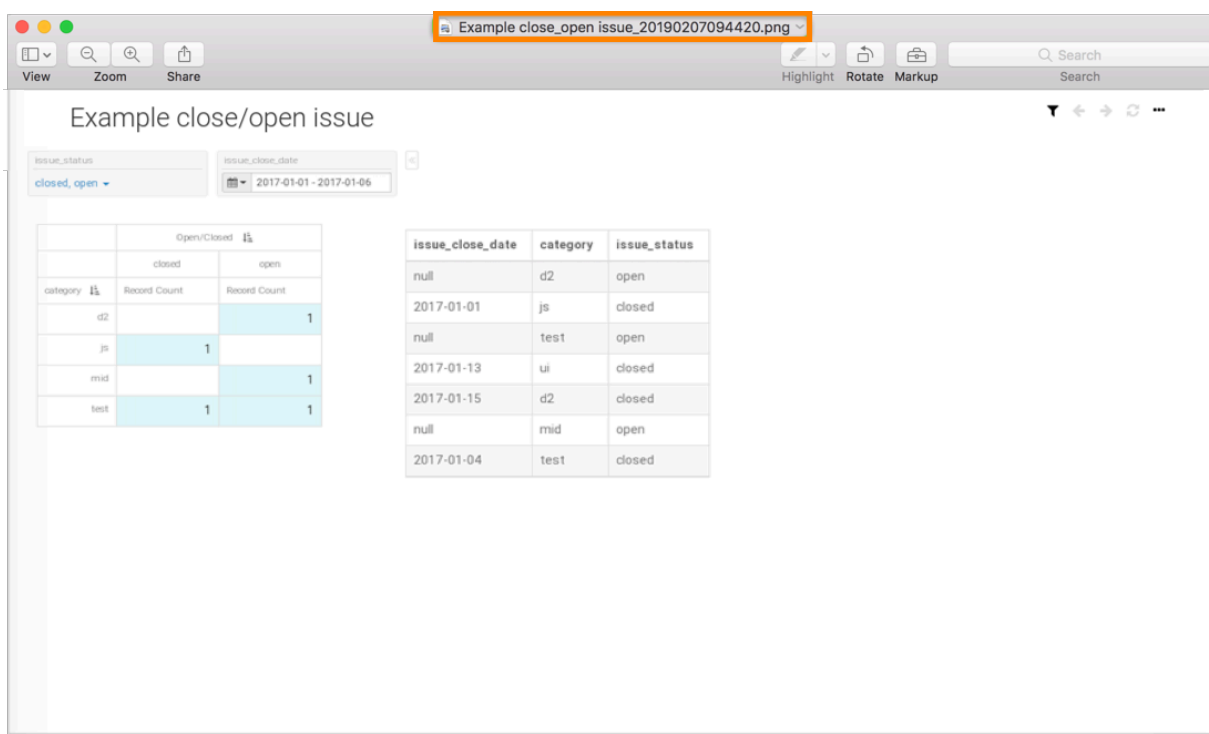
Downloading all sheets as a PDF File

Cloudera 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 .
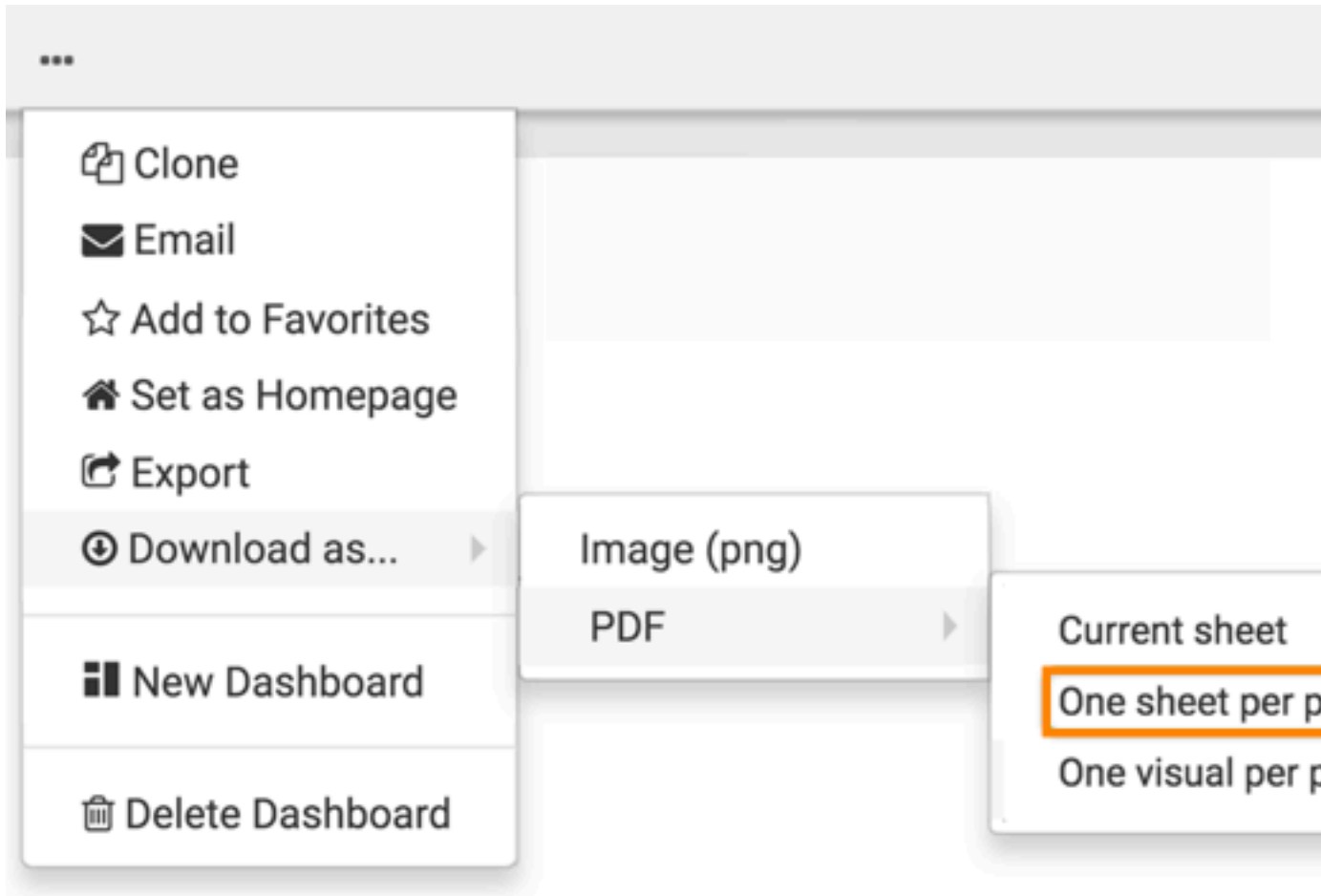
Procedure

1. Open any dashboard. In this example, the PDF Export dashboard that has two sheets is used.
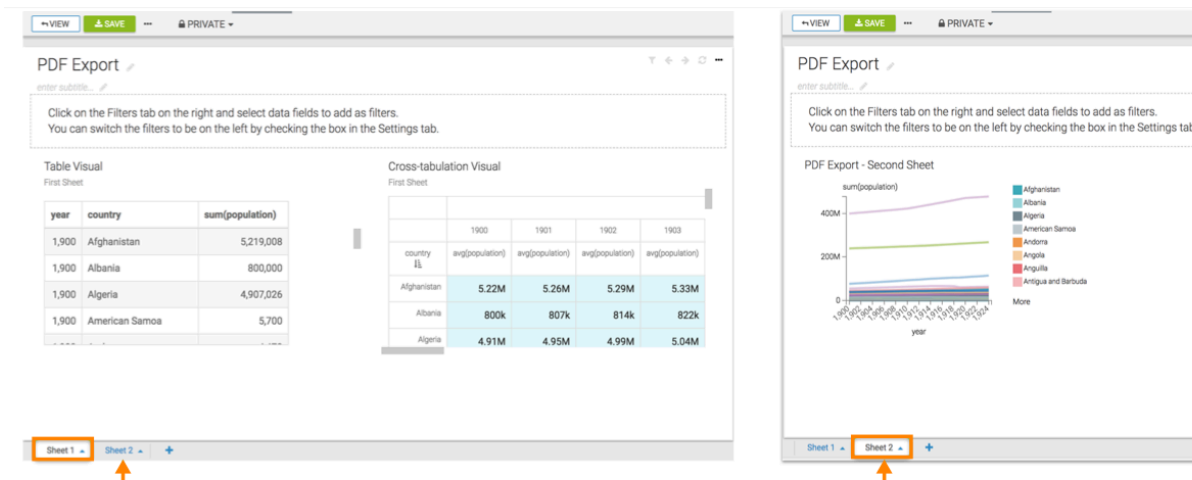
2. Click the (ellipsis) icon at the top left corner of the interface.

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_xxxxxxxxxxxxxx.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 sheet of the dashboard is on a separate page.

Downloading current sheet as a PDF file

Cloudera Data Visualization 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 .
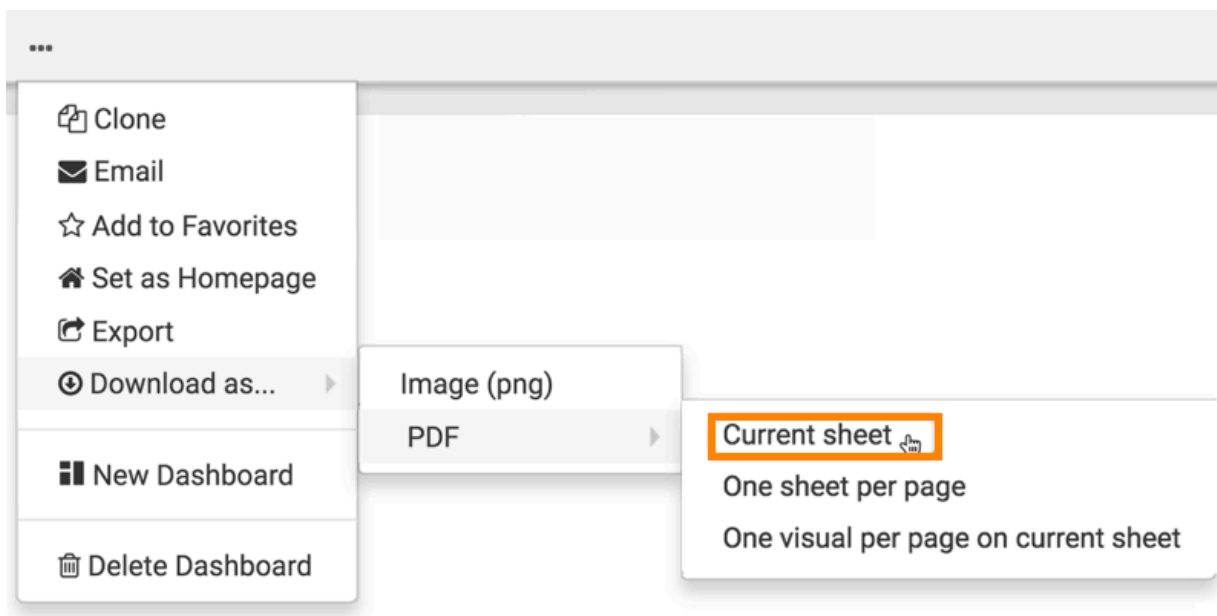
A Generating the requested file message appears.

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

> **Note:** CDP 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_xxxxxxxxxxxxx x.pdf, replacing the forward-slash (ASCII #47) character with a space.
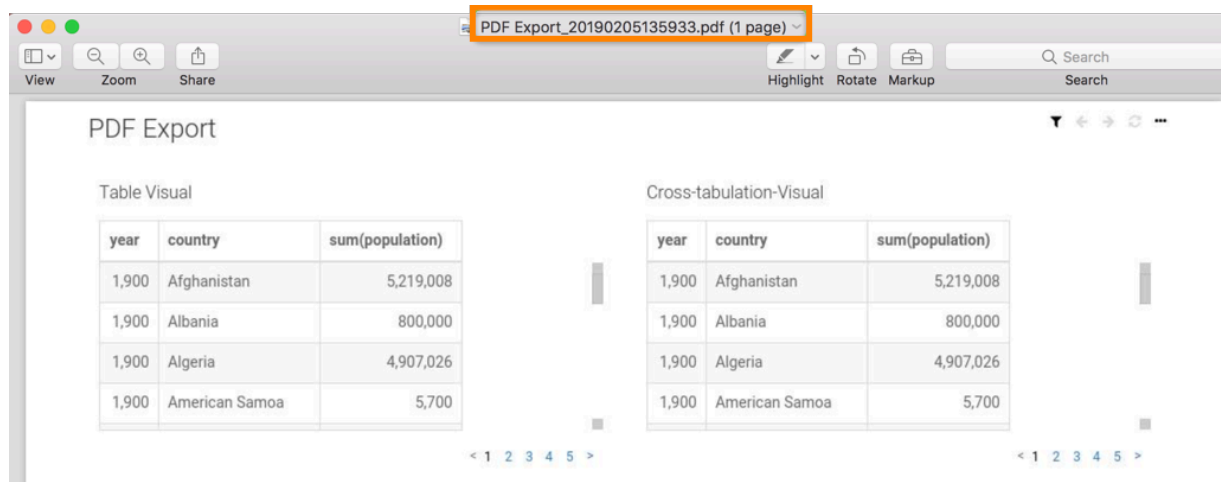
The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created.

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

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

Cloudera Data Visualization 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

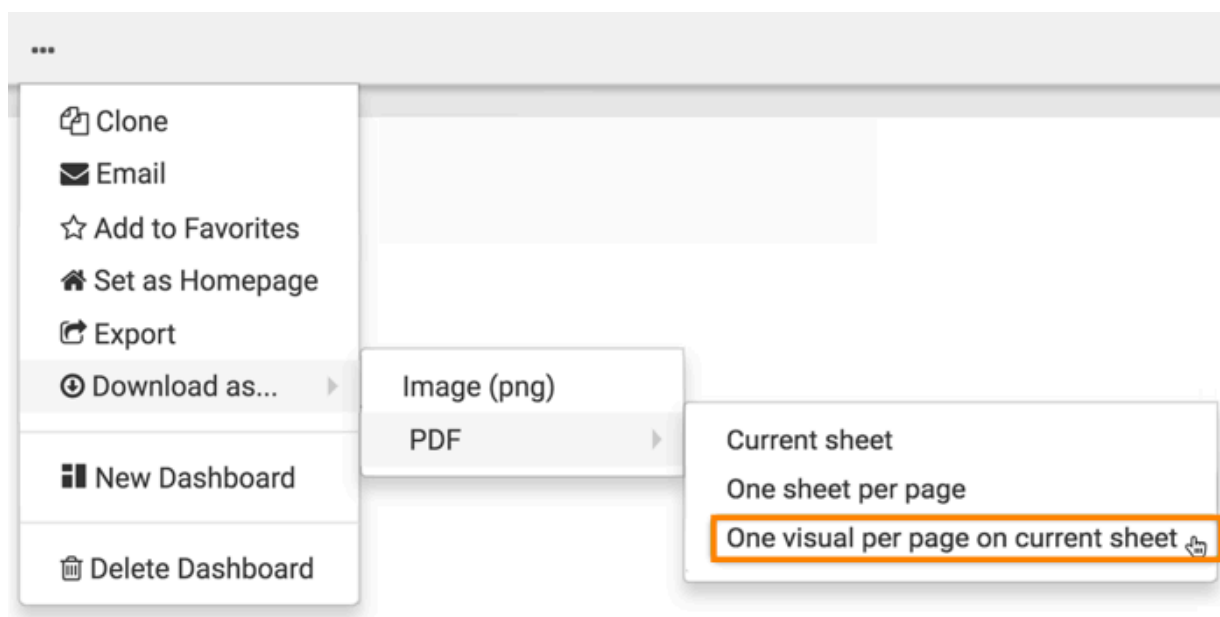1. Open any dashboard. In this example, the PDF Export dashboard is used, which has two visuals.

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_xxxxxxxxxxxxxx.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.

Emailing sheets

Cloudera Data Visualization enables you to share dashboards through email. You can send them immediately, schedule them at specific times and intervals, or through a triggered response when reaching a specific monitored threshold.

Before you begin

Before using the email function, you must enable the feature in site settings. For instructions, see *Email settings*.

Complete these prerequisites in your system configuration:

- Enable screenshot and thumbnail downloads. For instructions, see *Snapshots*.
- Enable email functionality. For instructions, see *Email settings*.
- Enable scheduled jobs. For instructions, see *Enabling scheduled jobs*.

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

Procedure

1. Select the sheet you want to share in email by clicking on its tab at the bottom left corner of the Dashboard Designer interface.
2. In the top menu bar, click the (ellipsis) icon to open the supplemental menu, and select Email.
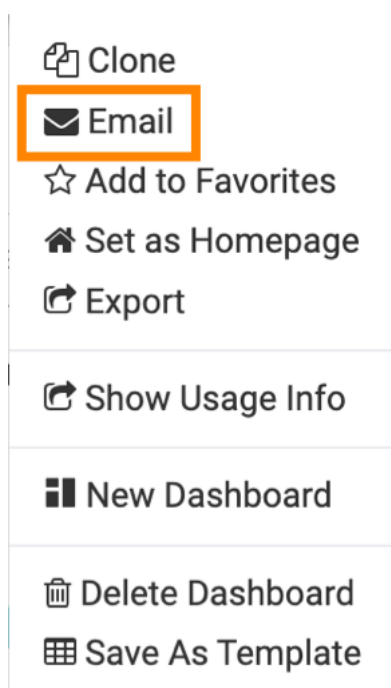
The Email Current Sheet modal window appears.

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

1. Email now – For instructions on providing email details, see *Immediate email*.

2. Schedule Email – For instructions on providing email details, see *Schedule-based email*.

3. Email based on threshold – For instructions on providing email details, see *Threshold-based email*.

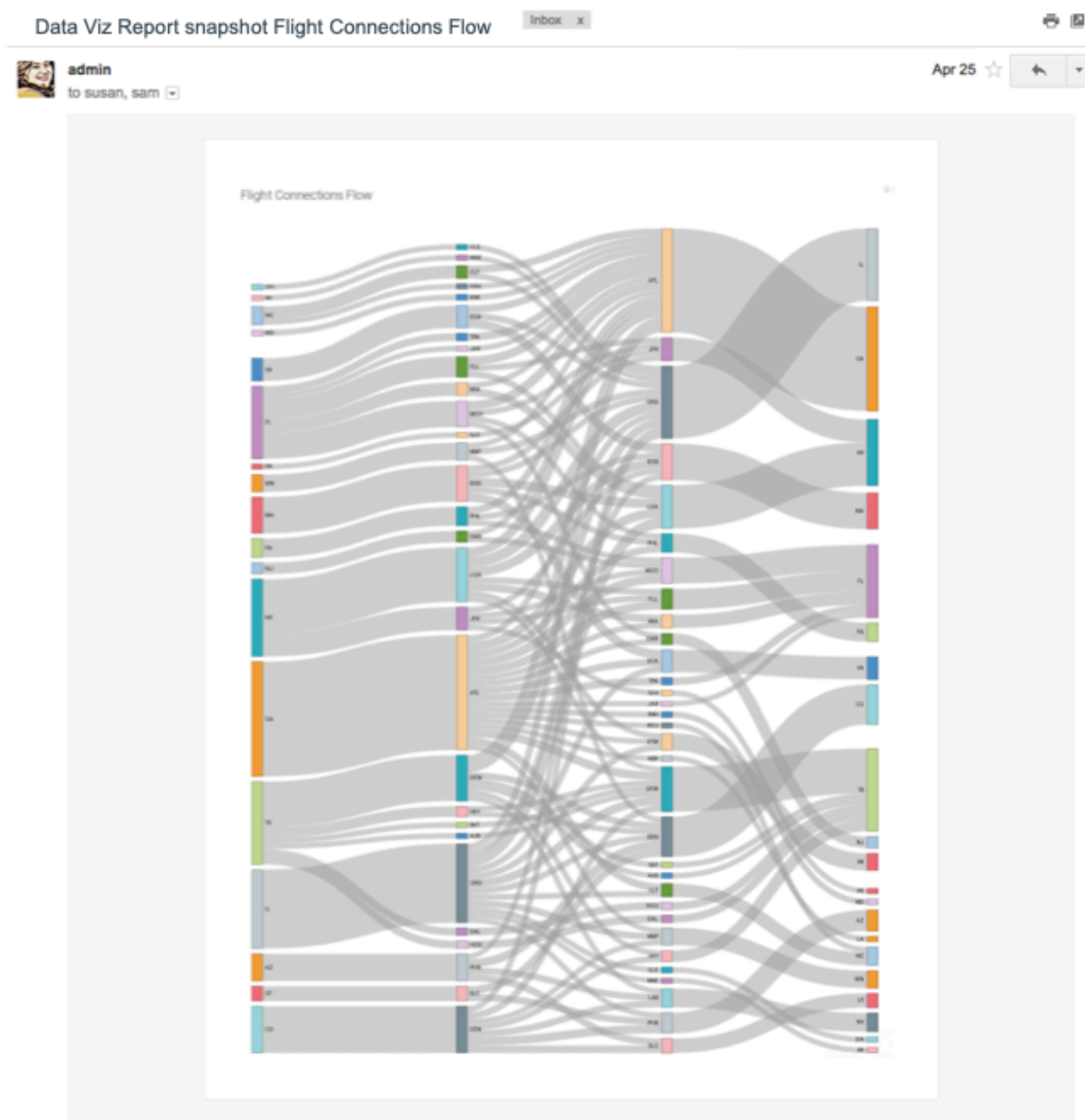**4.** After creating emails, you can monitor them in the Jobs interface, review their details, rerun, cancel, and so on.
For more information, see *Managing jobs*.

Example

A sample email may look like this:

Note: You can only email one dashboard sheet at a time, but if you have more sheets on your dashboard, you can repeat this procedure for each sheet.

Related Information
Email settings
Snapshots
Enabling scheduled jobs
Immediate email
Schedule-based email
Threshold-based email
Managing jobs

Deleting a sheet

Cloudera Data Visualization enables you to delete sheets from a dashboard.

Procedure

1. Open a dashboard in Edit mode.
2. Click the ▲ icon on tab of the sheet that you want to remove.
3. In the sheet management menu, click Delete.
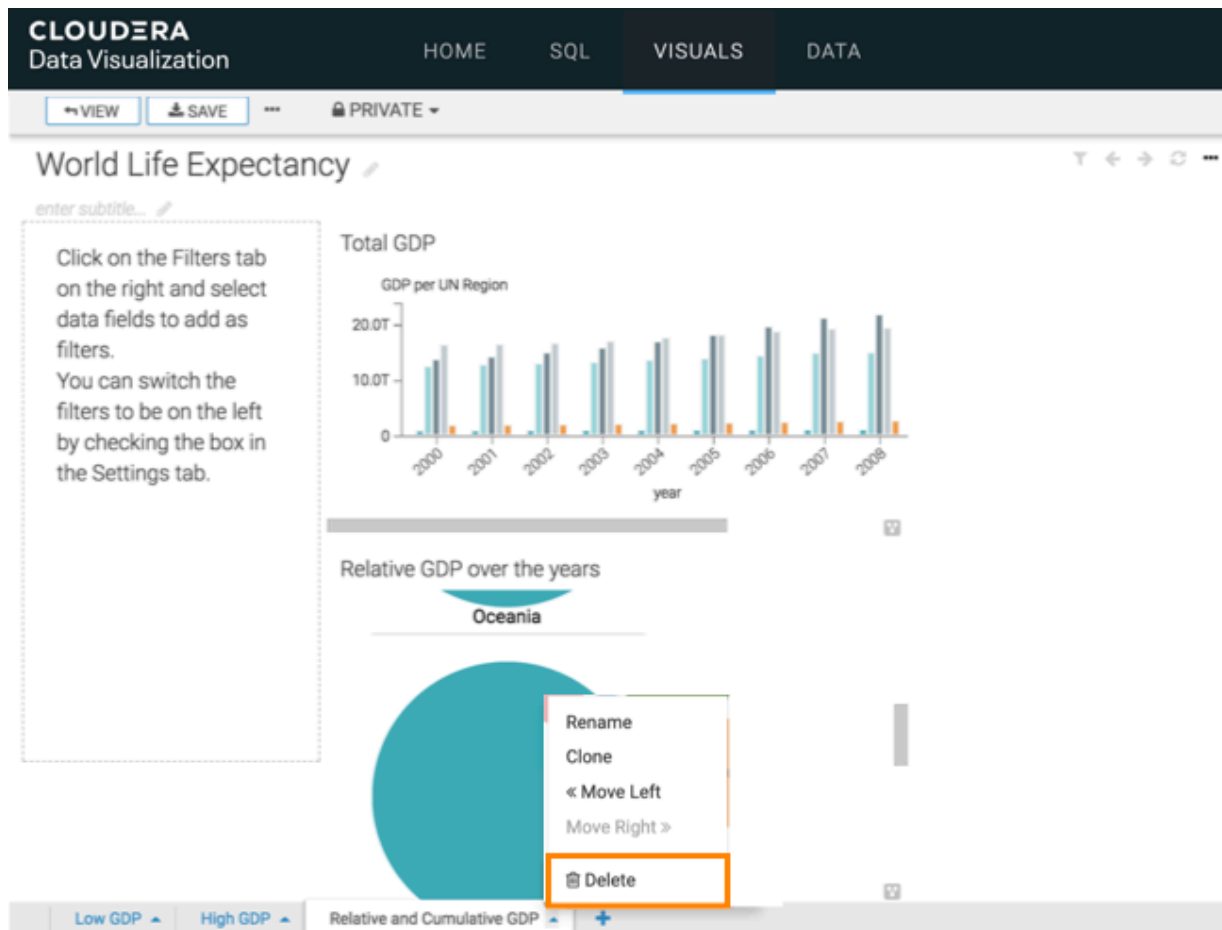
4. Click SAVE to save all changes made.

Results

After saving the dashboard, you can see that the deleted sheet is no longer visible.