Cloudera Data Visualization 7.2.3

CDP Data Visualization Quickstart

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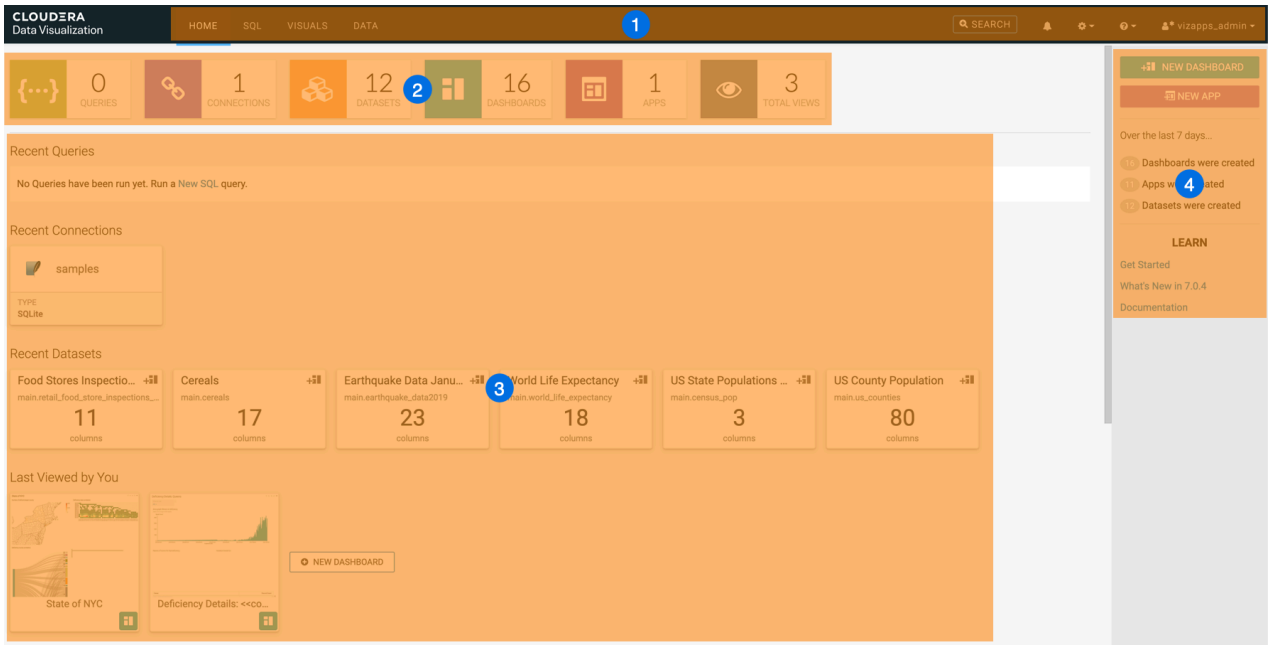
Understand the Data Visualization user interface

CDP Data Visualization enables you to explore data and communicate insights across the whole data lifecycle by using visual objects. The web-based user interface provides user-friendly, clear and intuitive navigation in Data Visualization.

The default CDP Data Visualization homepage contains the following main items:



1. The main navigation bar offers you direct access to the following interfaces and actions:
   - Home
   - SQL
   - Visuals
   - Data
   - Search
   - Notifications center
   - Settings
   - Help
   - User management
2. The statistics banner shows the number of queries, connections, datasets, dashboards, apps, and total views in your Data Visualization instance.
3. The preview area provides quick access to the following items:
   - Recent queries
   - Recent connections
   - Recent datasets
   - Favorites
   - Items you last viewed
   - Items you recently created
   - Overall most popular items
   - Sample dashboards

4. The homepage side menu bar offers you access to the following functions:
   - NEW SQL takes you to the Data Connection interface, where you can compose a SQL query.
   - NEW DASHBOARD takes you to the Dashboard Designer interface, where you can create new dashboards and visuals.
   - NEW APP takes you to the App Designer interface, where you can build and style custom applications from existing dashboards and visuals.
   - Over the last 7 days... shows statistics on how many dashboards, apps, and datasets were created.
   - In the LEARN section, you can find the following information:
     - Get Started points to help content embedded in the tool.
     - What's New in opens a modal window showcasing new features.
     - Documentation opens this product documentation library.

If you need more information about the UI, see *Cloudera Data Visualization homepage*.

Related Information

Cloudera Data Visualization homepage

Set up your data

CDP Data Visualization supports a large number of data connections.

Related Information

Data connections in CDP Data Visualization

Creating a data connection

You must connect to your data before you can start using CDP Data Visualization for modeling and visualizing the data. You can define connections to various source systems. Learn how to create a simple data connection.

About this task

In Cloudera Data Warehouse (CDW), the connection to the database catalog is automatically set up when you enable Data Visualization in a Virtual Data Warehouse.

Note: You can create your own connections to other data warehouses, but it is not supported.

Database catalogs and virtual data warehouses automatically inherit the same security restrictions that are applicable to your CDP environment. There is no need to specify the security setup again for each database catalog or virtual warehouse. If you cannot see the data in the connected database catalog after you log in, check and adjust data access permissions or your environment and data warehouse user permissions.

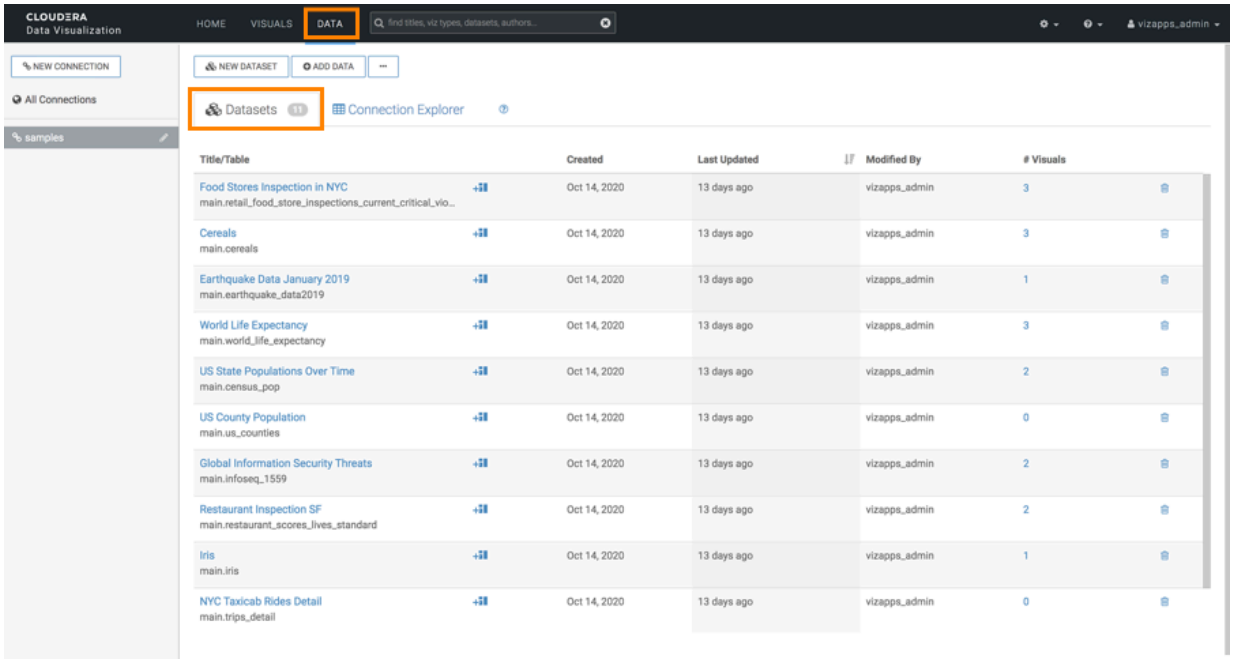
In Cloudera Machine Learning (CML), you can set up several connection types. For example, you can connect Data Visualization to an Impala or Hive data warehouse. For more information on connection types, see *Data connections in CDP Data Visualization*.

Important: Only users with Manage data connections privilege can create and manage connections in Data Visualization. If you create a connection, you automatically have the privileges to create and manage datasets on this connection, and also build dashboards and visuals in these datasets. For more information on user privileges, see *RBAC permissions*.

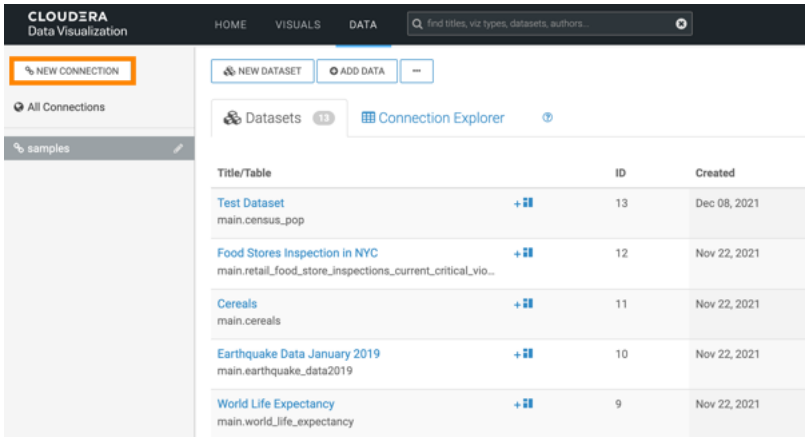
Procedure

1. On the main navigation bar, click DATA.

   You get to the DATA interface, open on the Datasets tab.

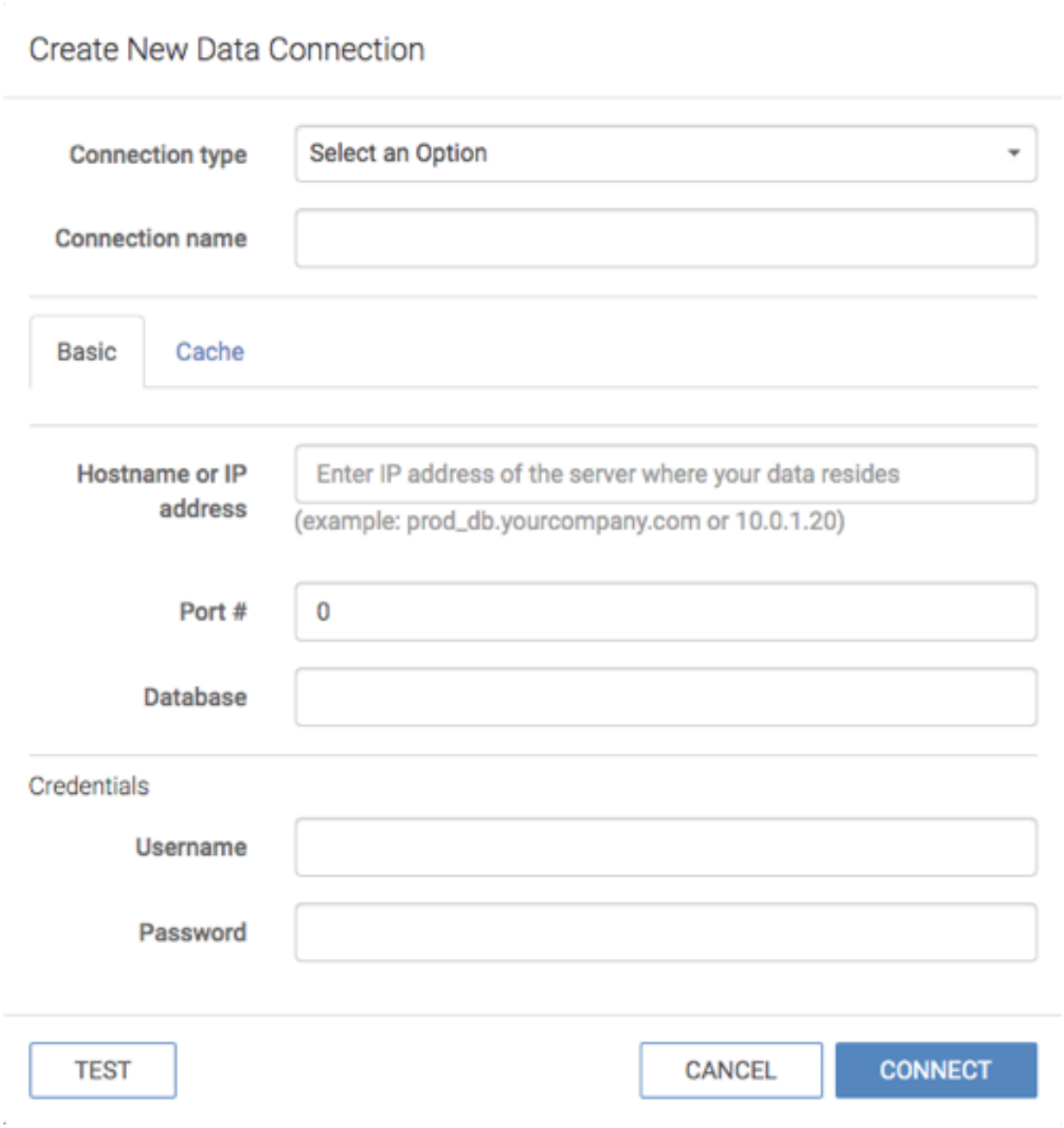


2. In the side menu bar, click NEW CONNECTION.



   The Create New Data Connection modal window appears.

3. Specify the details of the new connection.



4. Click TEST.
   If the connection is valid, the system returns a Connection Verified message.
5. Click CONNECT.

Results

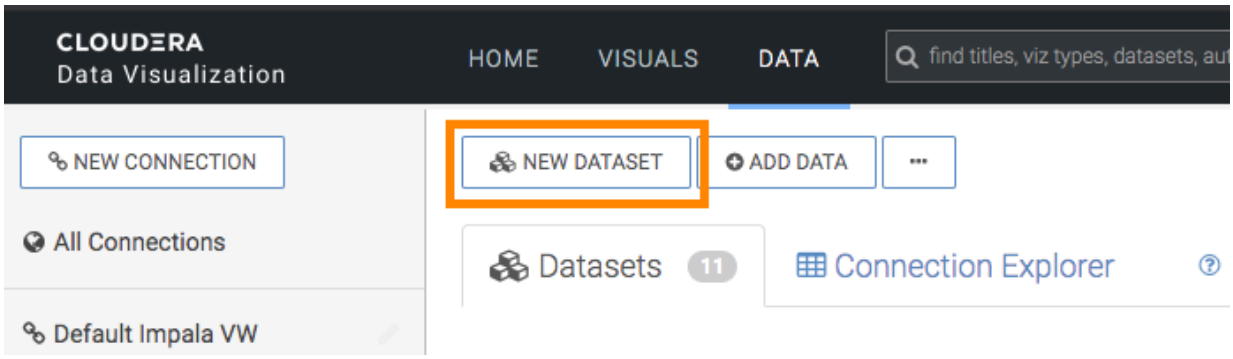
If this operation succeeds, the name of the new connection appears on the side menu bar.

Creating a dataset

You can define datasets as a semantic layer on top of your data tables and views in the data store. You need to create a dataset before you can create dashboards or apps. Learn how to create a dataset in CDP Data Visualization.

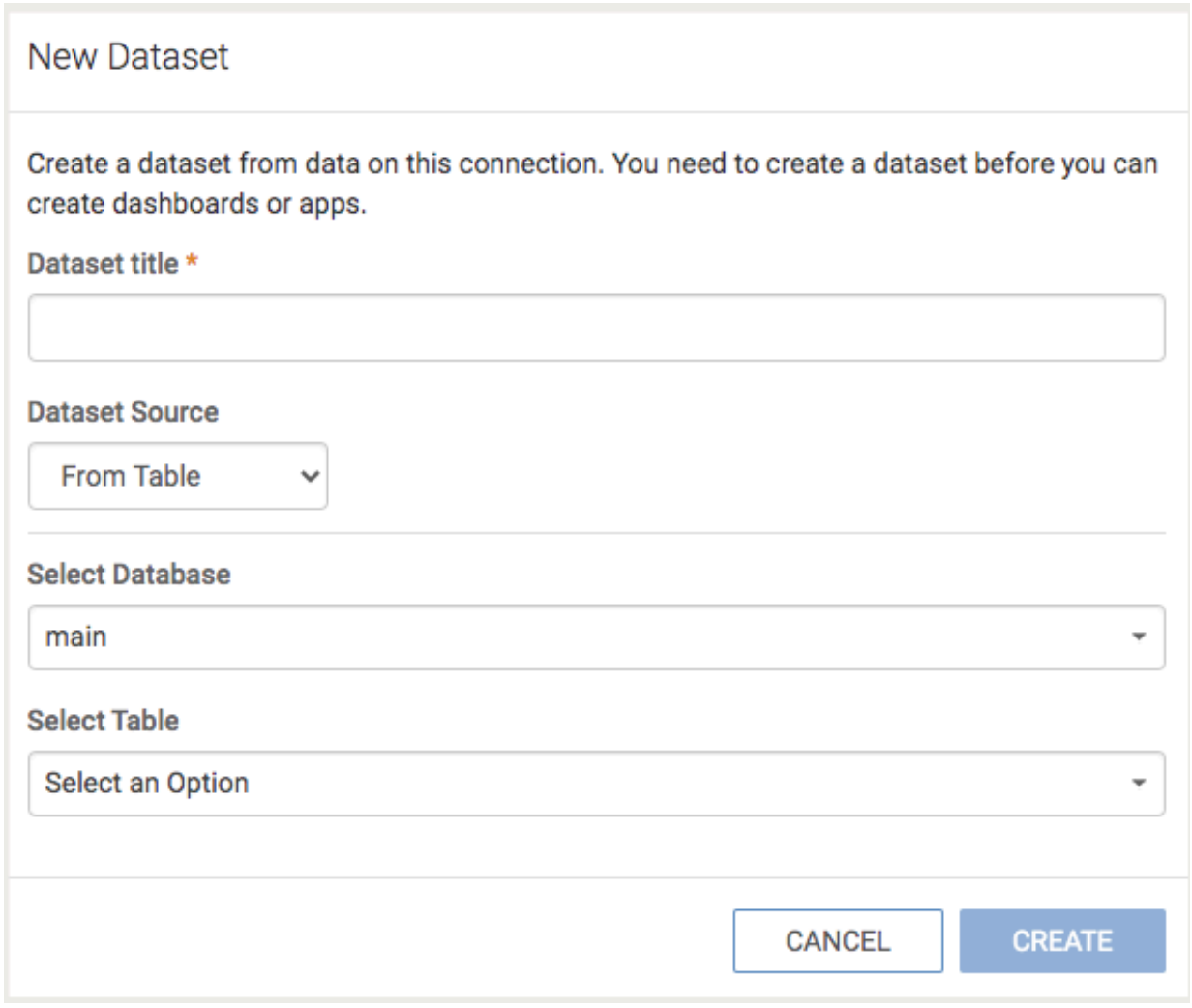
Procedure

1. On the main navigation bar, click DATA.
2. Select a connection from the side menu bar.
3. Click NEW DATASET near the top of the screen.



The New Dataset modal window appears.

4. Specify the details of the new dataset.



5. Click CREATE.

Results

You can see the newly created dataset under the Datasets tab in the DATA interface.

Tip: To find the dataset in the future, you can scroll through the list of datasets on the connection, or use Search at the top of the page.

What to do next

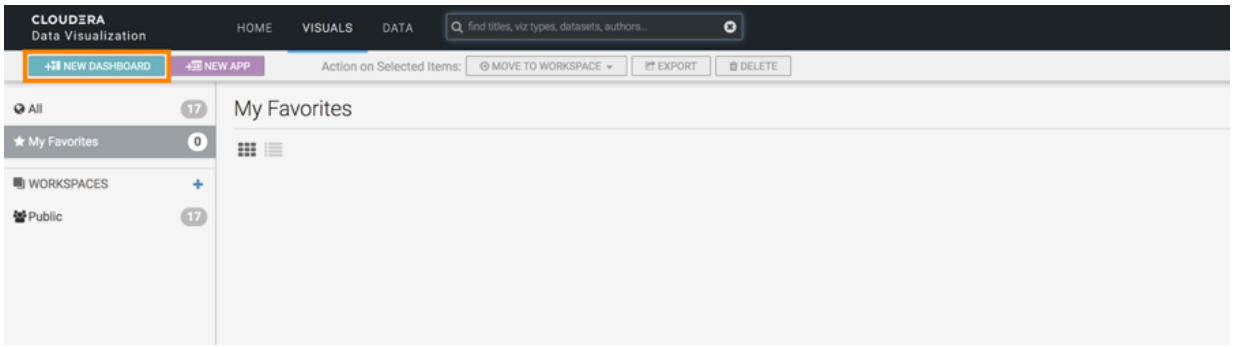
You can now start creating visualizations and organize your visual artifacts into dashboards and applications.

Create a visual

Learn how you can create a visual in CDP Data Visualization.

Procedure

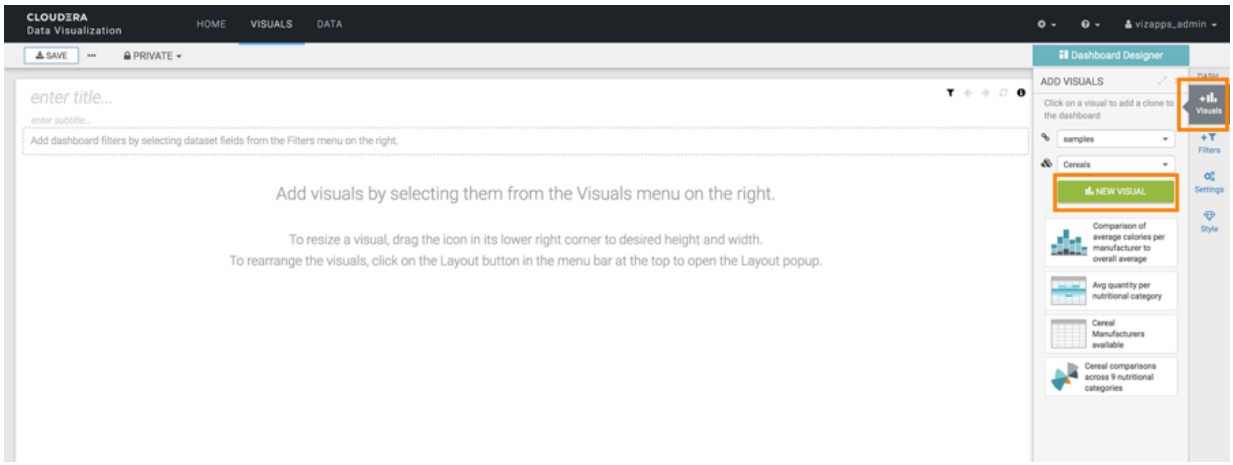
1. On the main navigation bar, click VISUALS.
2. Click NEW DASHBOARD to open a new dashboard in Edit mode.



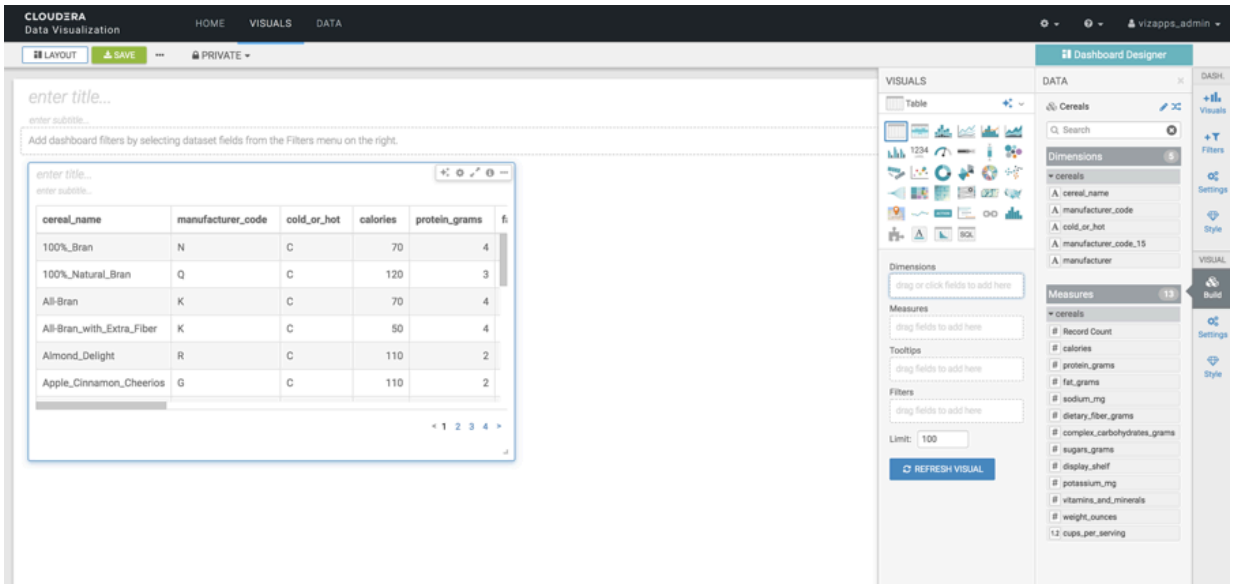
Alternatively, click an existing dashboard, and then click Edit to make changes to it.

3. In the Dashboard Designer menu, click the Visuals icon to open the ADD VISUALS interface.

4. Click NEW VISUAL.



The visual designer interface opens with a default table representation of the dataset you want to visualize.



5. Choose a visual type from the VISUALS catalog, which shows the standard visual types. You can switch between visual types by selecting a different type in the catalog.

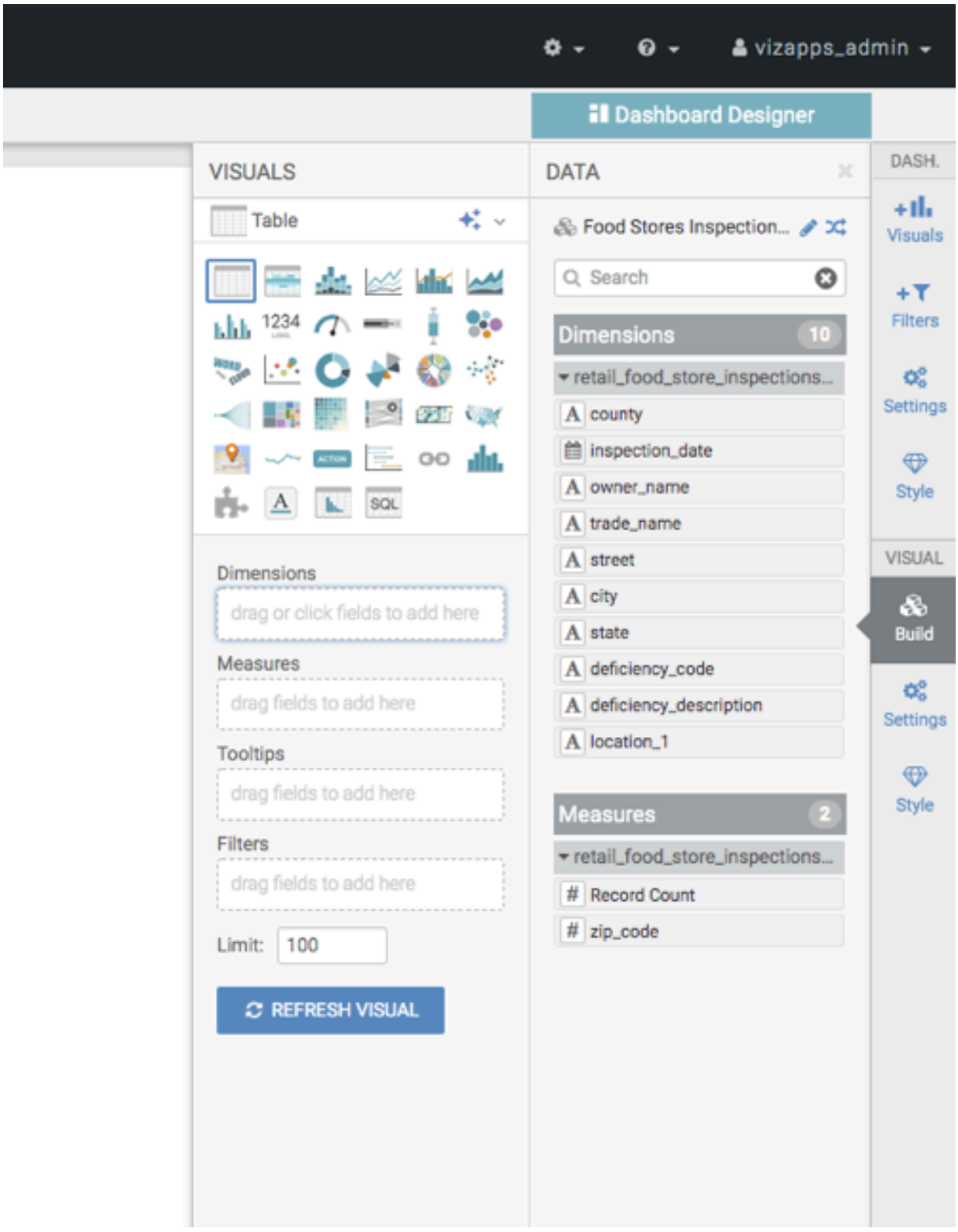
Tip:

When creating a new visual for a dataset, you can get visualization suggestions for your data. For details, see *Exploring visual options*.

If Explore Options Visual Types is not available on the UI when creating a new visual, enable it in the Site Settings interface. For details, see *Enabling exploring visual options*.

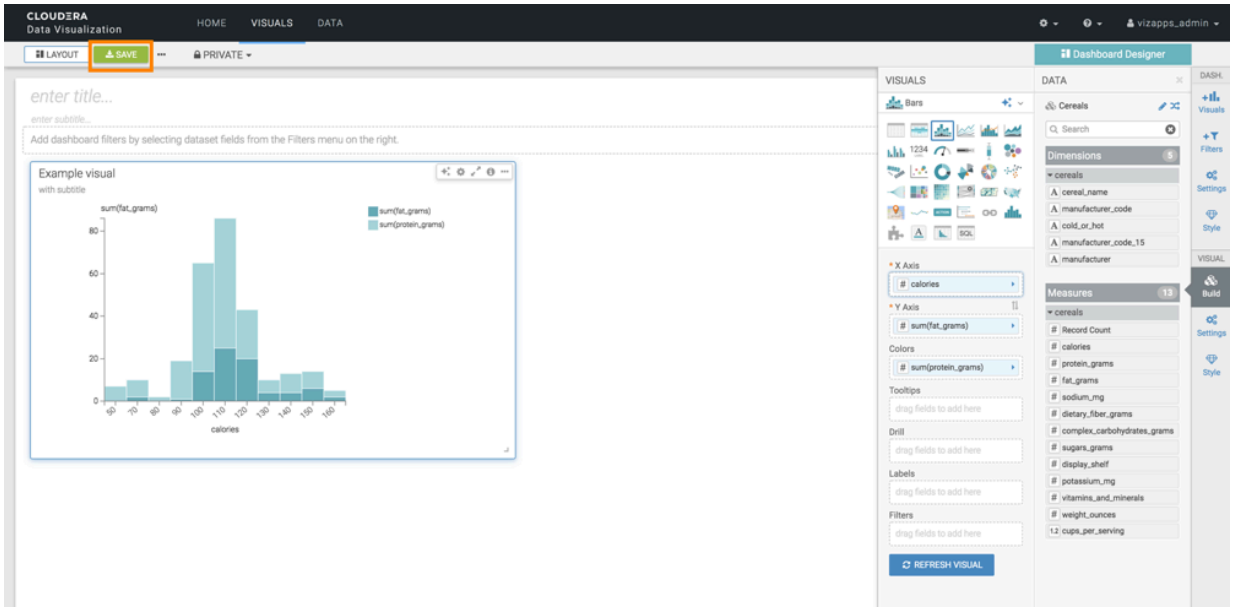
6. Populate the shelves from the available Dimensions and Measure fields.

   The shelves of a visual specify the fields and segments that provide the data for visualization. Different visual types require specific information, and have somewhat different shelves.



7. Click REFRESH VISUAL.
8. Add a title for the visual by clicking into the enter title... field to edit it.

9. [Optional] Add a brief description of the visual by clicking into the enter subtitle... field under the title of the visual.
10. At the top left corner of the visual designer, click SAVE.



Related Information

Exploring visual options

Enabling exploring visual options

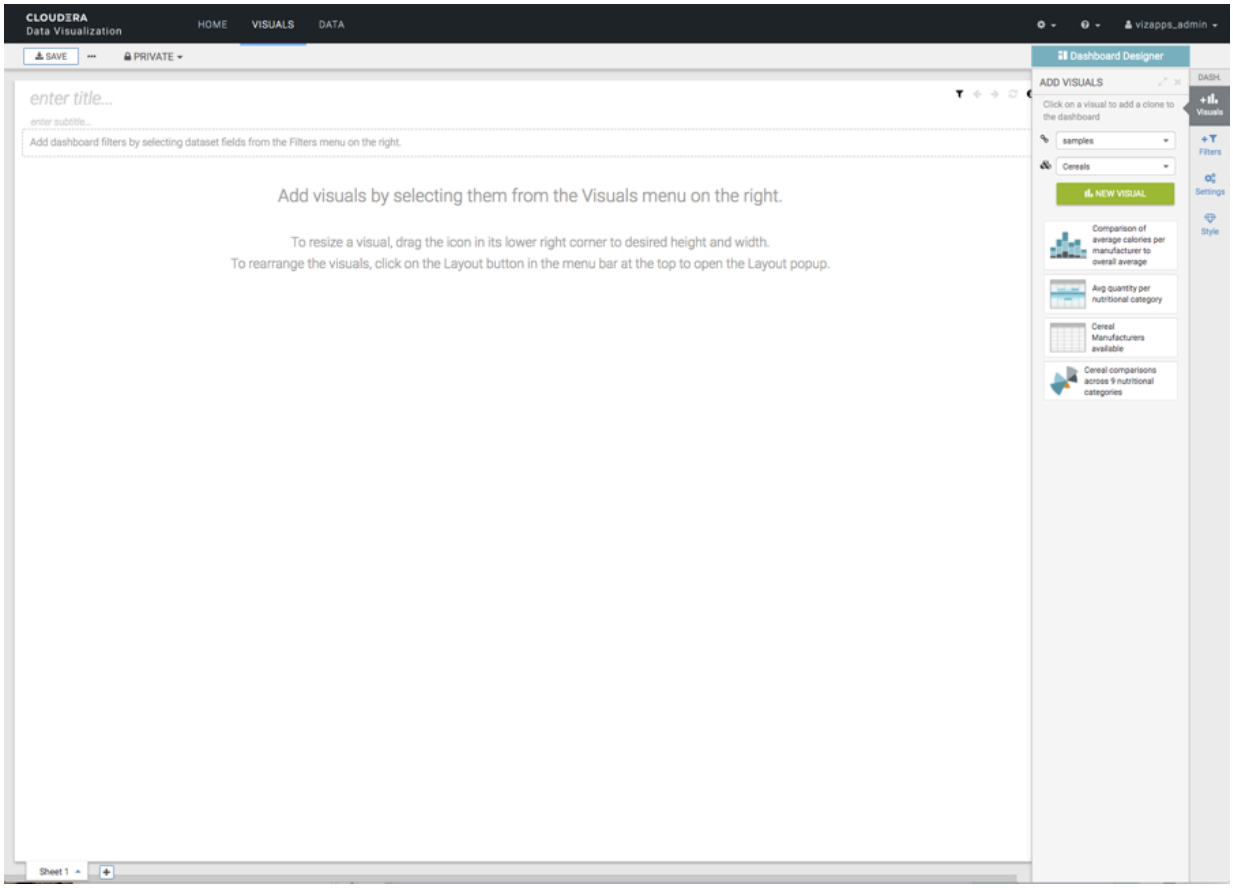
Create a dashboard

Learn how you can create a dashboard in Cloudera Data Visualization.

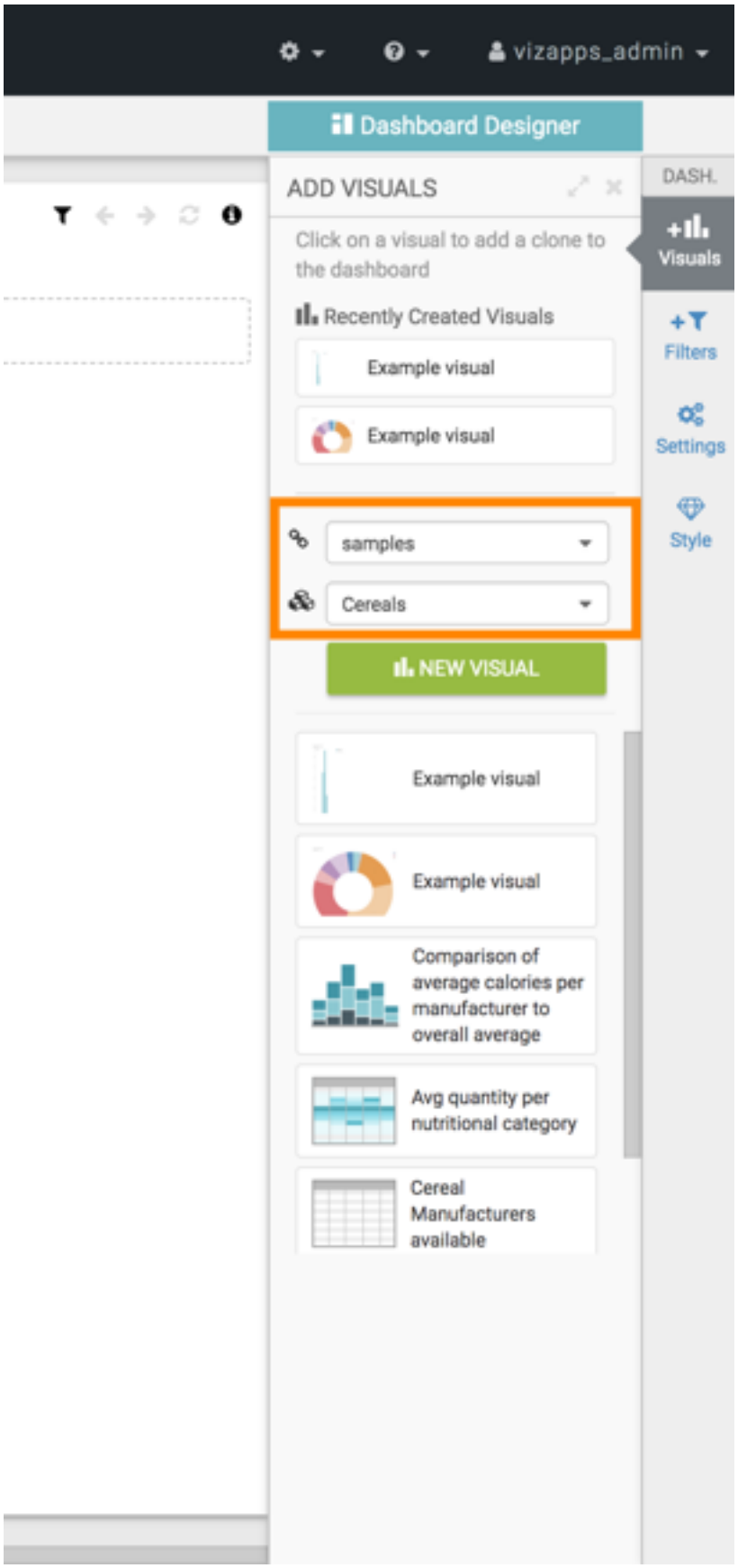
Procedure

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 Create New Dashboard in the top right corner.
   - On the DATA interface, click the 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 on an empty dashboard.



2. Check the dataset of the dashboard In the Visuals menu of the Dashboard Designer, and change it if needed.

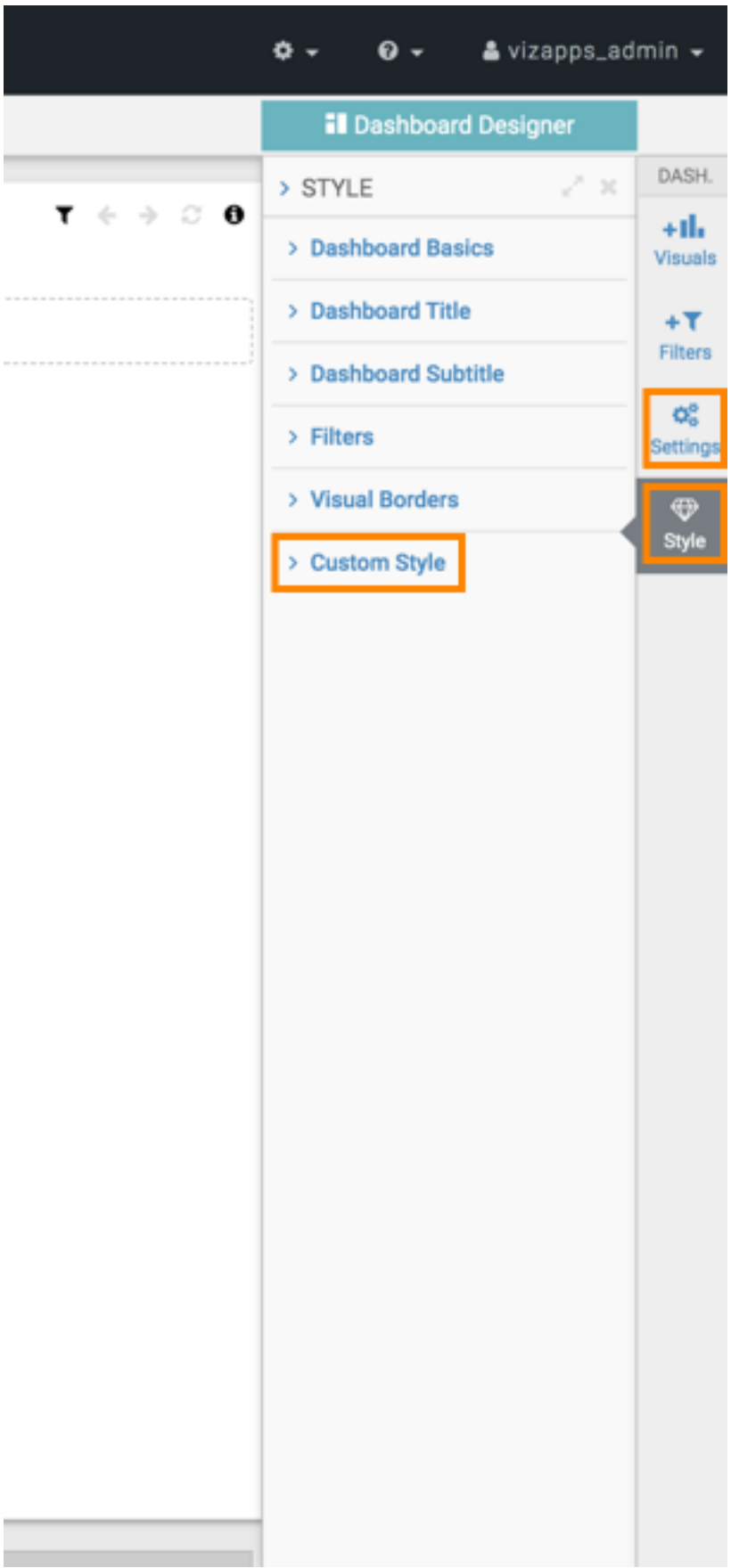


3. In the Visuals menu, click NEW VISUAL to add a new visual to the dashboard.

   Important: You cannot save an empty dashboard. You must add at least one visual to a sheet before saving the dashboard.

4. Add a title for the dashboard. Optionally, you can also add a subtitle.

5. [Optional] You can customize Settings, Styles, and Custom Styles for the dashboard in the Dashboard Designer side menu bar.


vizapps_admin
Dashboard Designer
STYLE
Dashboard Basics
Dashboard Title
Dashboard Subtitle
Filters
Visual Borders
Custom Style
DASH.
Visuals
Filters
Settings
Style

6. Click SAVE in the top left corner.

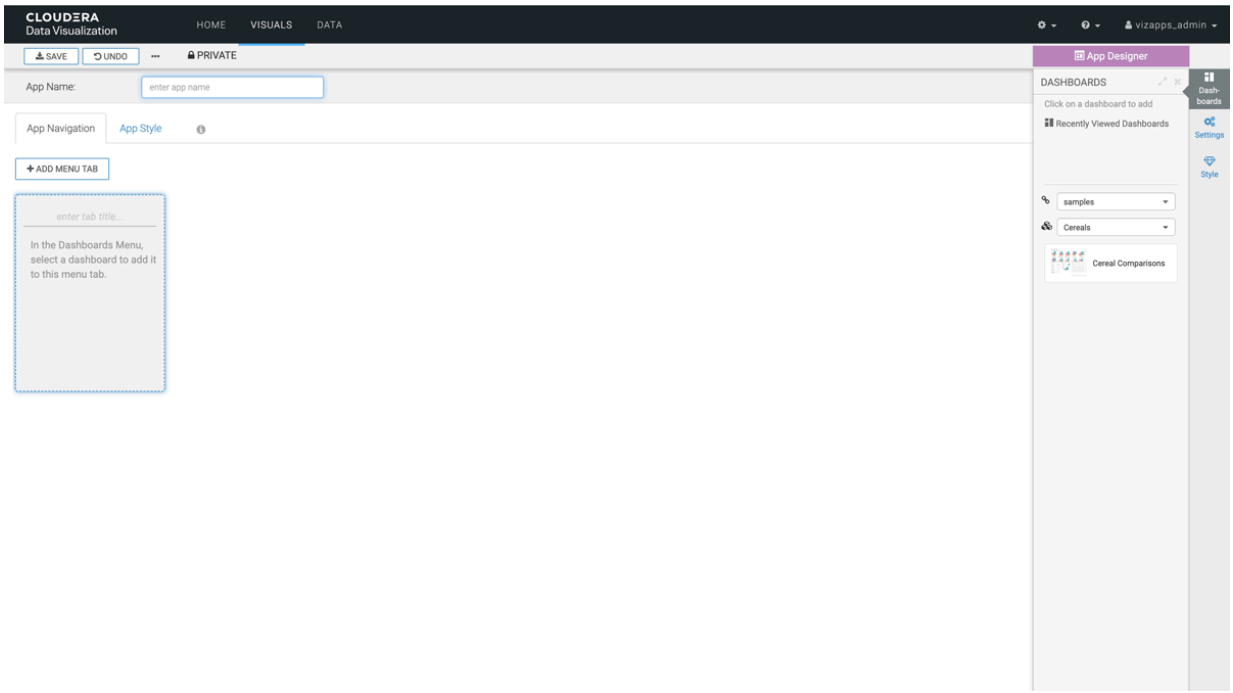
Create an app

Learn how you can create an app in Cloudera Data Visualization.

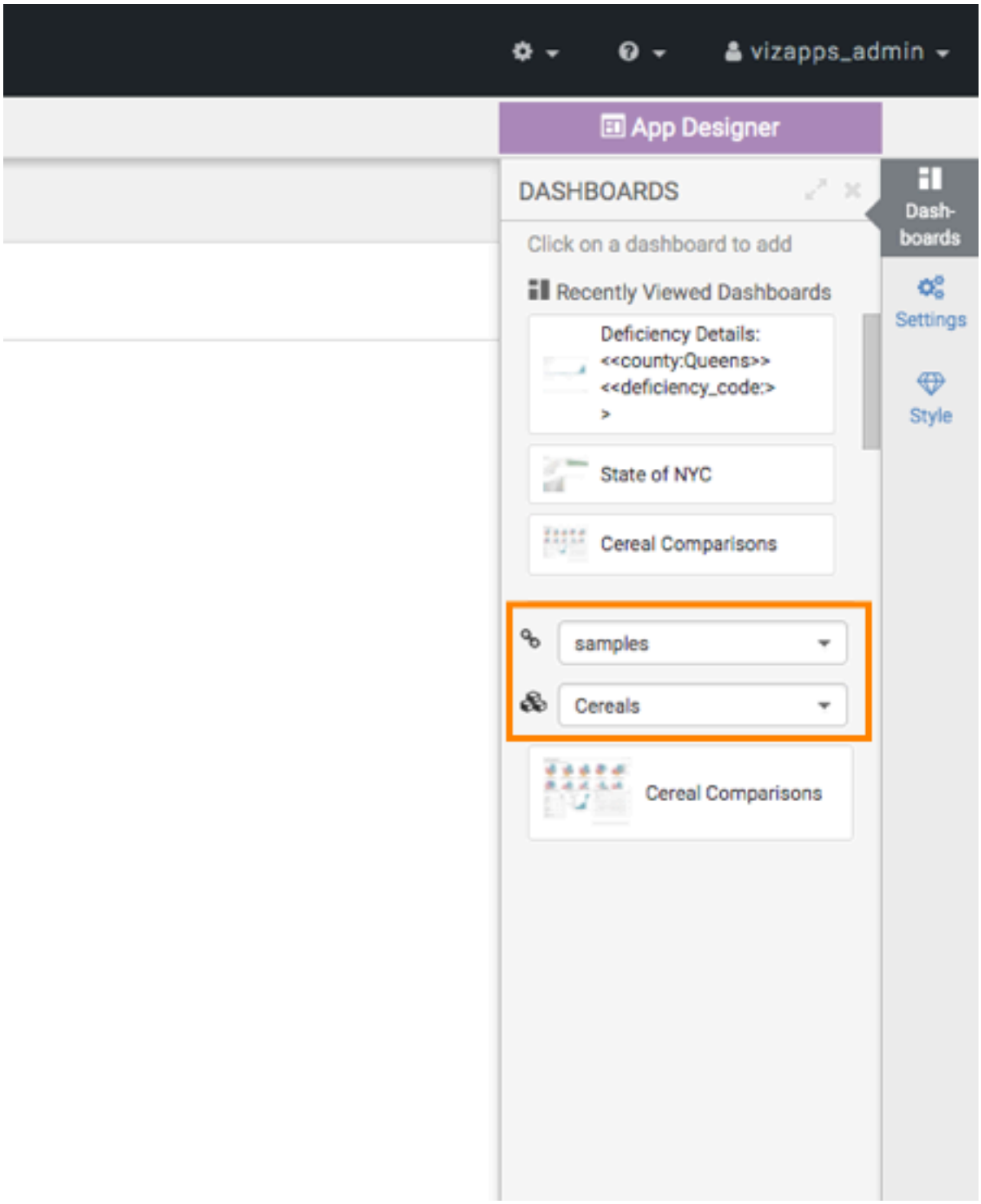
Procedure

1. Click NEW APP on the HOME interface, in the top right corner on the side panel.
   Alternatively, click Create New App in the top right corner.

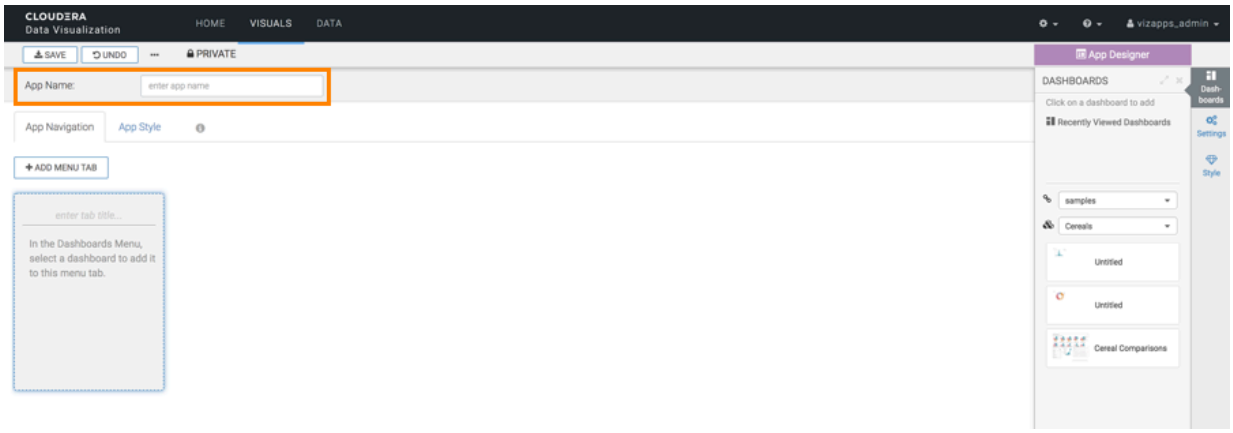
   The App Designer interface is displayed. It opens on the App Navigation tab, and it shows a default menu tab tile.



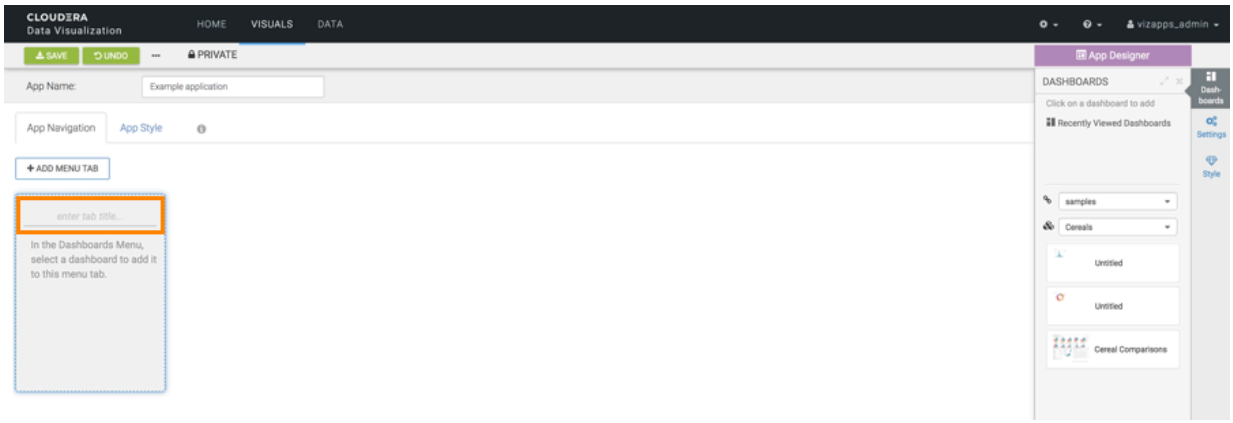
2. In the DASHBOARDS menu of the App Designer, select a dataset.



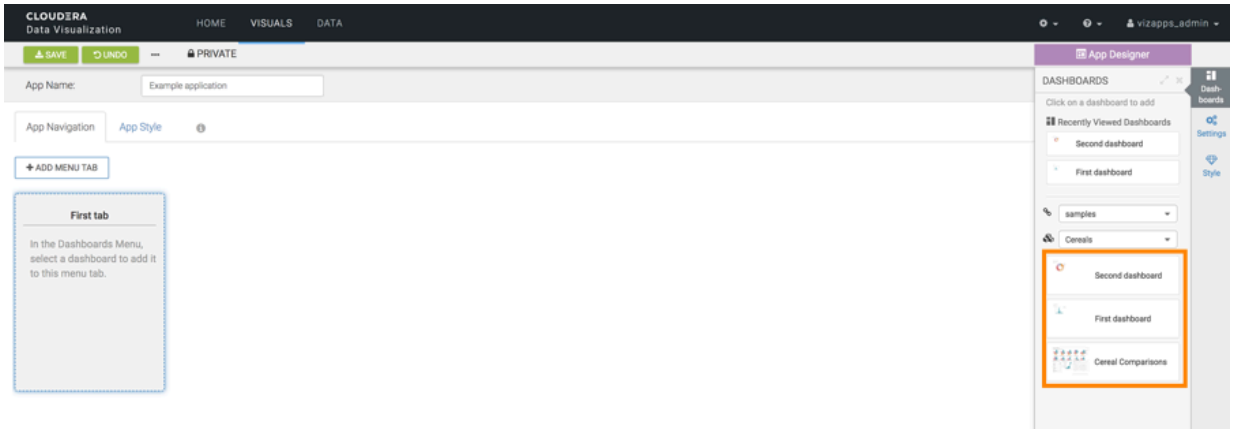
3. Enter a name for your app in the App Name text box.



4. In the highlighted empty tab, enter the tab title.

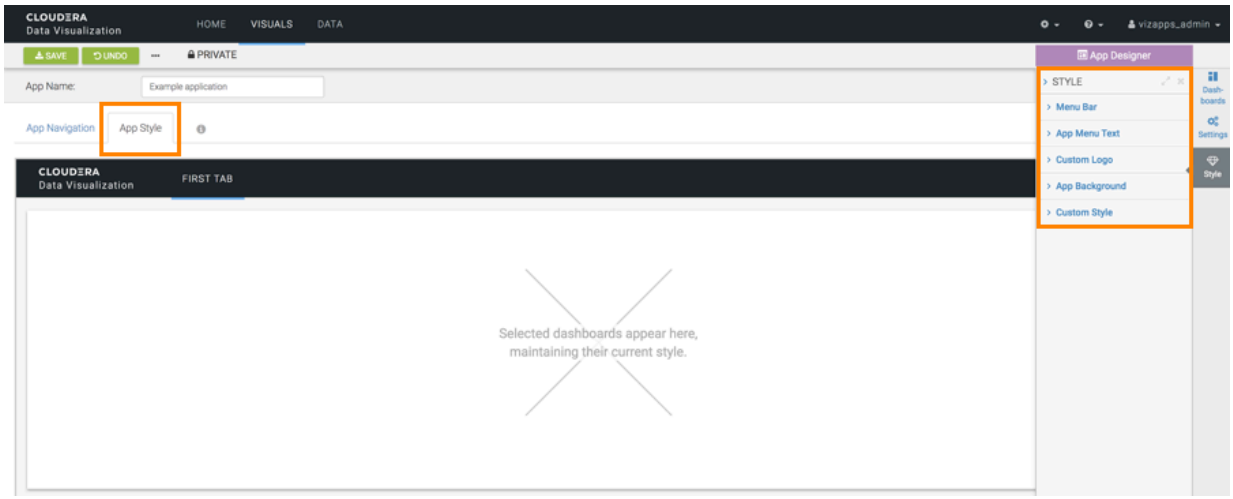


5. In the DASHBOARDS menu, select a dashboard to add it to this tab.



6. Switch to the App Style tab.

7. Design the appearance of your new app using the various style menu options on the side panel.



8. Click SAVE.

Results

You have created a new Data Visualization app. To the right of the App Name, you can see the ID of the app, its update time information, and the last user who modified it.